

**AoD**

**Attendance on Demand  
User  
Guide**

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Start by logging into Attendance on Demand (Use your login name & password)

A

## The Daily Dashboard

The daily dashboard provides complete status information by the day for the pay period

Menu Administrator Browser Profile

Periods Current Period

Calendar Dashboard

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
May 10	May 11	May 12 Exceptions 2	May 13 Missing Punches 1	May 14 Absent Today 0 Currently Working 24 Available Employees 16	May 15
May 17	May 18	May 19	May 20	May 21	May 22

Unauthorized Timecards (No Issues) 40 Employees

Leave Requests 9 request(s) made between Thu May-15 08 and Thu May-14 09

- Daily Dashboard
- Scheduling Dashboard
- Payroll Activity
- Employee List
- Terminated Employees
- Employee Schedules
- Scheduled Absences Next Week
- Schedule Patterns
- Department Hours
- Employee Hours
- Employee Exceptions
- System Reports
- My Reports
- Add New Employee
- Setup
- Holiday Dates
- Group Adjustment
- My Account

B

## Gauges

Wednesday	Thursday
May 13 Missing Punches 1	May 14 Absent Today 0 Currently Working 24 Available Employees 16

The Dashboard uses informational **Gauges** to inform the supervisor on existing conditions.

Gauges are day sensitive. Notice that the current day's gage provides different information than the previous days gauges provide.

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## News Items

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⌵

**Employees Need Review**

1 Employees

⌵

**Unauthorized Timecards**

17 Employees

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⌵

**Leave Requests**

2 request(s) made between Mon Nov-27 00 and Sun Dec-03 00

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⌵

**Scheduled Coverage**

Thu Nov-30 00

A Variety of **News Items** may provide the Supervisor with relevant weekly information

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**Leave Requests**

2 request(s) made between Mon Nov-27 00 and Sun Dec-03 00

Employee	Request	Hired	Requested On
Benedict, Matthew A	Request 32.00 Hours from Tue Dec-26 00 to Fri Dec-29 00. Using Personal.	Fri Dec-07 90	Thu Nov-30 00 9:43p
Byelich, Mary	Request 8.00 Hours on Wed Dec-06 00. Using Vacation.	Thu Jul-06 00	Thu Nov-30 00 10:00p

**News Items** expand when you left click on the icon ⌵

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Thursday	
Nov	30
Absent Today	2
Currently Working	8
Scheduled Off	1
Leave Requests	2
Available Employees	2

### Drill Down Capabilities

Gauges allow drill downs or additional information.

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**Currently Working**

Last Name	First Name	ID Number	Last Punch
Furey	John	430	Thu Nov-30 00 8:13a
Patel	Kristina	129	Thu Nov-30 00 8:03a
Louis	Doyle	247	Thu Nov-30 00 8:03a
Gerner	Anna	163	Thu Nov-30 00 3:30a
Goral	Gina Marie	196	Thu Nov-30 00 5:47a
Campione	Teresa	140	Thu Nov-30 00 5:38a
Debuysers	Roseanne	202	Thu Nov-30 00 8:31a
Benedict	Matthew A	000115	Thu Nov-30 00 6:00a

Left clicking on *Currently Working* presents a list of Employees who are currently clocked in. The list may be sorted by left clicking on any header of the information.

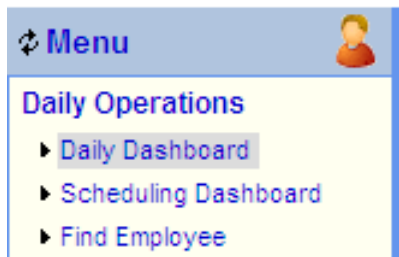
A

**For Thu Nov-30 00**

Last Name	First Name	ID Number	Last Punch
Gerner	Anna	163	Thu Nov-30 00 3:30a
Campione	Teresa	140	Thu Nov-30 00 5:38a
Goral	Gina Marie	196	Thu Nov-30 00 5:47a
Benedict	Matthew A	000115	Thu Nov-30 00 6:00a
Patel	Kristina	129	Thu Nov-30 00 8:03a
Louis	Doyle	247	Thu Nov-30 00 8:03a
Furey	John	430	Thu Nov-30 00 8:13a
Debuyser	Roseanne	202	Thu Nov-30 00 8:31a

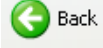
In the example to the left, employees are sorted by the actual punch in time, earliest to latest.

B

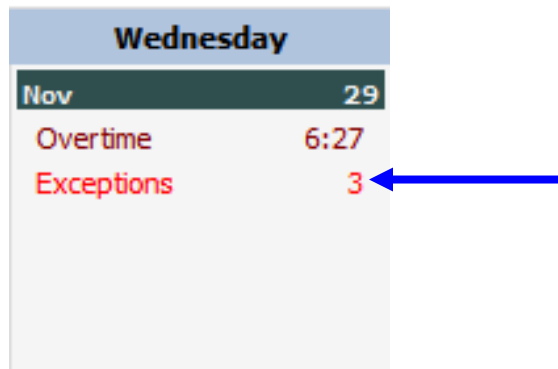


Return to the Daily Dashboard by left clicking on Daily Dashboard

Caution must be used when choosing the

Browser back icon.  **No processing of data occurs when the back icon is used**

C



**Exception Monitoring**

Exception tracking is the heart of the supervisor monitoring employee work performance.

Left click on Wednesdays **Exceptions**.

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## The List of Exception Employees Only

**You may edit all employees on a single screen or go to the individual time card**

Employee Time Cards by Day											
Last Name		First Name		ID	Department						
Benedict		Matthew A		000115	TELMRK						
Date	Date	Schedule		Punches	Hours	Workgroups					
		Start	End			In	Out	Department	From	To	Hours
3	Nov-29	6:00a	2:00p	5:22a 2:00p	8.13	TELMRK	5:22a	2:00p	8.13	Arr. Early	
Burke		Adele		103	TELMRK						
Date	Date	Schedule		Punches	Hours	Workgroups					
		Start	End			In	Out	Department	From	To	Hours
3	Nov-29	9:00a	6:00p	9:32a TDY 1.00 Point	0.00		9:32a	9:32a	0.00	Tardy, Miss. Pun. Tardy < 2 Hours	
Hoesle		Mary		680	OFFICE						
Date	Date	Schedule		Punches	Hours	Workgroups					
		Start	End			In	Out	Department	From	To	Hours
3	Nov-29	10:30a	3:15p	9:45a 10:30p	0.00		9:45a	9:45a	0.00	Arr. Early, Miss. Pun.	
3	Nov-29				0.00		10:30p	10:30p	0.00	Unsch., Miss. Pun.	

B

### Viewing the Entire Timecard

Last Name		First Name		ID	Department						
Benedict		Matthew A		000115	TELMRK						
Date	Date	Schedule		Punches	Hours	Workgroups					
		Start	End			In	Out	Department	From	To	Hours
3	Nov-29	6:00a	2:00p	5:22a 2:00p	8.13	TELMRK	5:22a	2:00p	8.13	Arr. Early	
Burke		Adele		103	TELMRK						

If you prefer to view the entire timecard for each employee you may left click on the **employee name** to bring up the entire imecard

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Pages	Time Card	Pay Periods	Current Period	Employee	Benedict, Matthew A						
Benedict, Matthew A (TELMRK)					Benedict, Matthew A Burke, Adele Hoesle, Mary						
Last Name		First Name		ID	Department						
Benedict		Matthew A		000115	TELMRK						
Date	Date	Schedule		Punches	Hours	Workgroups					
		Start	End			In	Out	Department	From	To	Hours
1	Nov-27	6:00a	2:00p	6:05a 2:08p	7.42	TELMR					
2	Nov-28	6:00a	2:00p	5:50a 2:08p	7.50	TELMR					
3	Nov-29	6:00a	2:00p	5:22a 2:00p	8.13	TELMR					
4	Nov-30	6:00a	2:00p	6:00a	0.00						
5	Dec-1	Vacation	8.00		8.00						
6	Dec-2										

With the entire timecard viewed, you have an *Employee* drop down that lists only the employees with exceptions on the day you're monitoring

D

### Adding a Missing Punch

Burke		Adele		103	TELMRK						
Date	Date	Schedule		Punches	Hours	Workgroups					
		Start	End			In	Out	Department	From	To	Hours
3	Nov-29	9:00a	6:00p	9:32a	0.00		9:32a				

Right click on the date (Nov-29 for Adele Burke) to display the editing options.

Left click on *Adjustments* then on *Add a Punch*

**Add a New Punch for This Employee**

Date: 11/29/2000

Time: 6pm

Transaction Type: Standard Transaction

Station: None

Reason: Failure to Punch

Ok Cancel

Fill in the Punch time and choose a *Reason* code for the edit. (Administrators may add and edit reason codes under *Operations, Setup* in the menu section)

Process by left clicking on OK

A

Schedule		Punches			Hours
Start	End	Unreviewed Exceptions			
		In	Out		
9:00a	6:00p	9:32a	6:00p	TDY 1.00 Point	7.97
BILL ADD PUN Wed Nov-29 00 6:00p (Failure to Punch)					

The punch is added and the daily total is calculated.

Left click on the drop down symbol to view edits made to this day and the reason code assigned

B

Punches			Hours	Department
Unreviewed Exceptions				
	In	Out		
9:32a	6:00p		TDY	
OFFICE				

Remove This Punch

Alter Punch to Become...

### Removing a Punch

Right click on the punch you wish to remove and select *Remove This Punch*

C

Punches			Hours	Workgroups	
Unreviewed Exceptions				Department	From
	In	Out			
9:45a	10:30p		0.00	9:45a	9:4
10:30p			0.00	10:30p	10:3

Remove This Punch

Alter Punch to Become...

- A Standard Punch
- The Start of a Shift
- The End of a Shift
- Part of the Previous Shift

### Altering a Punch

You may alter the punch alignment by right clicking on the punch to alter and selecting *Alter Punch to Become....* And making the desired selection


D

Punches			Hours
Unreviewed Exceptions			
	In	Out	
9:45a	10:30p		12.25



Altering the punch alignment allows you to over ride the maximum shift length rule to calculate extra long shifts.

E

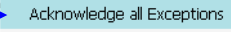
Date	Start	End	In	Out	
Nov-29	6:00a	2:30p	5:22a	2:00p	9:08

 BILL ADD 1:00 TO Wed Nov-29 00 (Supervisor Permission)

### Cancel an Edit

Left click on the  to see a list of edits. You may Cancel an Edit using the  *Cancel Icon*

Punches		Hours	Workgroups		Exceptions
In	Out		Department	From	To
5:22a	2:00p	8:08	TELMRK	5:22a	2:00p

 Acknowledge all Exceptions

Acknowledge Arr. Early  
 Acknowledge Left Early

### Acknowledge Exceptions

Left Click on the exceptions and choose an individual exception or *Acknowledge all Exceptions*



Date	Schedule	Punches
Date	Start	End
Aug-19	23:00	7:00
Aug-20		23:00 7:00

Date	Schedule	In	Out
Date	Start	End	
Nov-27	11:00p	7:30a	10:58p 7:32a

### Special Consideration for 3<sup>rd</sup> Shift

Punches for 3<sup>rd</sup> shift employees that cross midnight will display the date in which the hours are programmed to be assigned.

-  Indicates the scheduled In time Starts on the previous day and shows the start date
-  Indicates the scheduled Out time Ends on the next day

Dec-2		8:00a	8:20a	TELMRK	8:00a
Dec-3					

Remove This Punch  
 Alter Punch to Become...  
 Change To Callback Style...

- Min 2 Hours
- Min 1 Hour OVT
- Callback Style 3
- Callback Style 4
- Callback Style 5

### Call Back Styles

Right click on the start punch of a day you wish to assign a call back style and select *Change To Callback Style* (Dec 2 8:00am in this example) And choose from the 5 available styles.

Dec-2		8:00a	8:20a		2.00
Dec-3					

The change will immediately reflect in the daily hours

First Name	ID	Department
Matthew A	000115	TELMRK


  

Schedule	Punches	Hours	Workgroups
Start	In	Out	Department
6:00a 2:00p	6:05a 2:08p	7.42	TELMRK
6:00a 2:00p	5:50a 2:08p	7.50	TELMRK
6:00a 2:00p	5:22a 2:00p	8.13	TELMRK
6:00a 2:00p	6:00a	0.00	TELMRK
Vacation 8.00	Vacation	8.00	

TDY 1.00 Point  
 Transfer at time of Day  
 Reallocate Hours  
 Cancel Transfer Adjs

### Workgroup Transfers

Right click anywhere in the workgroup area on the day you want to initiate a workgroup transfer and select *Transfer at time of Day*

 *Reallocate Hours* Allows you to transfer in blocks of time

First Name	ID	Department
Matthew A	000115	TELMRK

Schedule	Punches	Hours	Workgroup
6:00a	6:05a 2:08p	7.42	TELMRK
6:00a			HELPER

**Transfer Employee at Time of Day**

Date: 11/27/2000

Time: 12:00

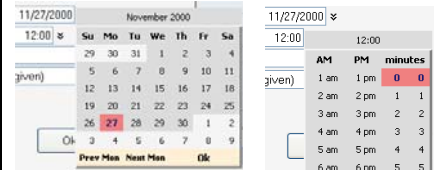
Department: HELPER

Reason: [no reason given]

Ok Cancel

Fill in the transfer window with the appropriate information.

The drop down arrows will bring up help in selecting a date or time.



A

Schedule	Start	End	Punches	In	Out	Hours	Department	Workgroups	From	To	Hours	Exc
6:00a	2:00p		6:05a	2:08p	7.42	TELMRK	6:05a	12:00p	5.42	Tar		
							HELPER	12:00p	2:08p	2.00	Tar	

TDY 1.00 Point

Once the Transfer is completed, the results can be seen in the **workgroup area** highlighted in red.

B

Hours	Workgroups	
Department	From	To
7:00	TELMRK	6:05a 2:08p
7	Reallocate Pay Designation Hours	
8	Rate Transfer on Mon 27-Nov	

### Other Transfer Types

Right Click on the **daily hours** and other transfer option are presented

C

## Scheduling in the Time Card

Date	Start	End	In	Out
Mo Aug-20				
Tu Aug-21	Scheduling			
We Aug-22	Adjustments			
Th Aug-23	Workgroup Ops			
Fr Aug-24	Notes/Comments			
Sa Aug-25				
Su Aug-26	Review			
Mo Aug-27				

### Adding Schedules

Right click on the date field and select *Scheduling*.

*Off This Day*

Removes all schedules

*Flex Schedule*

No start or end time

*Quick Schedules*

Pick list of common schedules

*Benefit Schedules*

Insert Planned Absence time

*Add a Schedule*

Add additional schedules

D

	<p style="text-align: right;">A</p> <h3 style="text-align: center;">Quick Schedules</h3> <p>Quick Schedules are a set of preset common schedules allowing the operator to quickly select the appropriate schedule.</p>
	<p style="text-align: right;">B</p> <p>The selected schedule is inserted on the date specified</p>
	<p style="text-align: right;">C</p> <h3 style="text-align: center;">Benefit Scheduling</h3> <p>Right click on the date to add the benefit schedule, choose Scheduling, Benefit Schedules and select the benefit type and amount. You may edit the amount after the selection by right clicking on the actual benefit schedule</p>
	<p style="text-align: right;">D</p> <p>The Benefit is scheduled</p>
	<p style="text-align: right;">E</p> <h3 style="text-align: center;">Schedule Changes</h3> <p>You may double left click on a schedule to edit the time. Press enter once you have entered the new scheduled time</p>
	<p style="text-align: right;">F</p> <p>More detailed editing is available by right clicking on the actual schedule.</p> <ul style="list-style-type: none"> <li><i>Add a Schedule</i> Add additional schedules</li> <li><i>Edit Schedule</i> Edit the existing schedule</li> <li><i>Delete Schedule</i> Delete the individual schedule</li> </ul>

A

**Edit Schedule for This Employee**

**Date** 8/20/2007

**Schedule Type** Standard Schedule

**Benefit** Vacation

**Start Time** 7:30a

**End Time** 3:00p

**Amount** 8.00

**Location** 001

**Department** 002

**Cost Center** 003

**Rate** 7.1500

**Schedule Style** Standard

Ok Cancel

### Editing the existing Schedule

You may edit the schedule type  
*Standard Schedule*  
*Flex*  
*Plan Absence schedule*

You may edit the *start/end* times

You may edit the *workgroup* assigned to this schedule

You may edit the rate of pay

You may assign any special schedule styles

B

2	Nov-28	6:00a	2:00p	5:50a	2:08p	7.50	TELMRK
3	Nov-29	6:00a	2:00p	5:22a	2:00p	8.13	TELMRK
4	Nov-30	6:00a	2:00p			0.00	
5	Dec-1	6:00a	2:00p			8.00	
6	Dec-2	6:00a	2:00p			2.00	TELMRK
7	Dec-3	6:00a	2:00p				

Right click on the date column, go to *Adjustment, Special Edits* and choose one of the four options.

In the example on Nov-28 Matthew is paid from his actual punch in time even though the punch occurred during the normal no-pay entry period

### Special Edits

Right click on the date column, go to *Adjustment, Special Edits* and choose one of the four options.

In the example on Nov-28 Matthew is paid from his actual punch in time even though the punch occurred during the normal no-pay entry period

C

Nov-28	6:00a	2:00p	5:50a	2:08p	7.67
Nov-29	6:00a	2:00p	5:22a	2:00p	8.13

Note the worked hours changed from 7.50 to 7.67

Note the worked hours changed from 7.50 to 7.67

D

Date	Schedule	Punches		Hours
		In	Out	
1	Nov-27	6:15a	2:00p	7.25
2	Nov-28	6:00a	2:00p	7.67
3	Nov-29	6:00a	2:00p	8.13
4	Nov-30	6:00a	2:00p	0.00
5	Dec-1	6:00a	2:00p	8.00
6	Dec-2	6:00a	2:00p	2.00
7	Dec-3	6:00a	2:00p	

Right Click on the Date (Nov-27) Select *Adjustments* and *Credit Worked Time*

**Crediting Non Worked Time**

This same selection may be used to Credit/Debit hours & dollars. To debit hours or dollars use the - sign to add a negative number

### Crediting Worked Hours

Right Click on the Date (Nov-27) Select *Adjustments* and *Credit Worked Time*

**Crediting Non Worked Time**

This same selection may be used to Credit/Debit hours & dollars. To debit hours or dollars use the - sign to add a negative number

A

**Credit Worked Hours for This Employee**

Date: 11/27/2000

Time: 12:00p

Amount: 1:00

Worked Time to Compensate: Pay Lunch Amount Deducted

Reason: Pay Amount Indicated, Pay Lunch Amount Deducted

Ok Cancel

Select the amount to credit and *Pay Amount Indicated* or select *Pay Lunch Amount Deducted* to automatically credit back the deducted lunch.

**Be sure to select a time when the employee was actually working or the edit will not take effect.**

B

Date	Schedule		Punches		Hours
	Start	End	In	Out	
Nov-27	6:15a	2:00p	6:05a	2:08p	7.75

Note the increase in daily hours from 7.25 to 7.75 with the 30 min lunch added back into the total

C

Date	Start	End	In	Out	Hours
Nov-27			6:05a	2:08p	7.25
Nov-27					TDY 1.00 Poi
Nov-27			5:50a	2:08p	7.75

**Adding Notes to the Timecard**

Right click on the date (Nov-27) and select *Adjustments*, *Notes/Comments*, *Add Note/Comment*

D

**Add Note/Comment for this Day**

Date: 11/27/2000

Comment: Permission to start 15 mins later

Ok Cancel

Fill in the Comment area with the desired note and select OK

Date	Schedule		Punches		Hours
	Start	End	In	Out	
<b>Nov-27</b>	6:15a	2:00p	6:05a	2:08p	7.75
	Permission to start 15 mins later		TDY 1.00 Point		
Nov-28	6:00a	2:00p	5:50a	2:08p	7.67
Nov-29	6:00a	2:00p	5:22a	2:00p	8.13
Nov-30	6:00a	2:00p	6:00a		0.00

The **date turns bold** to indicate a note exists. When the cursor is left on the date, the note will balloon out as seen here.

Date	Start	End	In	Out
<b>Nov-27</b>	6:15a	2:00p	6:05a	2:08p

- Scheduling
- Adjustments
- Workgroup Ops
- Notes/Comments
- Review
  - Daily Summaries
  - Period Summaries
  - Supervisor Adjustments
  - Notes/Comments
  - Benefit Balances

### Reviewing All Time Card Notes

You may also review all of the notes for the entire pay period by right clicking on any date and selecting *Review* then *Notes/Comments*.

**Employee Notes/Comments (Mon Nov-27 00 to Sun Dec-03 00)**

Date	Note/Comment
Mon Nov-27 00	Permission to start 15 mins later
Wed Nov-29 00	Requested Matthew start 30 mins early

Cancel

All Notes for the pay period will be displayed sorted by date.

Leave Requests			
2 request(s) made between Mon Nov-27 00 and Sun Dec-03 00			
Employee	Request	Hired	Requested On
Benedict, Matthew A	Request 32:00 Hours from Tue Dec-26 00 to Fri Dec-29 00. Using Personal.	Fri Dec-07 90	Thu Nov-30 00 9:43p
Byelich, Mary	Request 8:00 Hours on Wed Dec-06 00. Using Vacation.	Thu Jul-06 00	Thu Nov-30 00 10:00p

**Managing Leave Requests**  
Expand the Leave Requests news item. Note requests are sorted by seniority. Left click on Matthew Benedict's name.

Employee	Benedict, Matthew A									
Options	Time Off Request						Mo Tu We Th Fr Sa Su			
<b>Approve</b>	ID	Badge	Workgroup	Dec 18	19	20	21	22	23	24
<b>Deny</b>	<b>Benedict, Matthew A</b>			Dec 25	26	27	28	29	30	31
	<i>Request 32:00 Hours from Tue Dec-26 00 to Fri Dec-29 00. Using Personal.</i>			Jan 1	2	3	4	5	6	7
				8	9	10	11	12	13	14
				15	16	17	18	19	20	21

The First section displays the employee's request detail

Benefit Balances						Employee History from Mon Nov-20 00 to Sun Dec-03 00		
Benefit	Current Balance	Projected Use	Existing Requests	Projected Future Balance	Projected New Ending Balance	Vacation	Sick	Personal
Vacation	110:00	60:00	40:00	10:00	10:00	8:00		
Sick	5:30	0:00	0:00	5:30	5:30			
Personal	64:00	0:00	0:00	64:00	32:00			
Jury Duty	0.0000	0.0000	0.0000	0.0000	0.0000			
Unpaid Off	0.0000	0.0000	0.0000	0.0000	0.0000			
Brvment	0.0000	0.0000	0.0000	0.0000	0.0000			
Holiday	0.0000	0.0000	0.0000	0.0000	0.0000			
Lft Prm Un	0.0000	0.0000	0.0000	0.0000	0.0000			
FMLA	0:00	0:00	0:00	0:00	0:00			
Wrk Comp	0.0000	0.0000	0.0000	0.0000	0.0000			

The Second section displays the status of the employees current benefit bank balances

Tuesday			Wednesday			Thursday			Friday		
Dec 26	Dec 27	Dec 28	Dec 27	Dec 28	Dec 29	Dec 28	Dec 29	Dec 29	Dec 29	Dec 29	Dec 29
<b>Benedict, Matthew A</b>			<b>Benedict, Matthew A</b>			<b>Benedict, Matthew A</b>			<b>Benedict, Matthew A</b>		
Start	End	Amount	Start	End	Amount	Start	End	Amount	Start	End	Amount
6:00a	2:00p	8:00	6:00a	2:00p	8:00	6:00a	2:00p	8:00	6:00a	2:00p	8:00
<b>Workgroup Statistics</b>			<b>Workgroup Statistics</b>			<b>Workgroup Statistics</b>			<b>Workgroup Statistics</b>		
Schedules	Hours		Schedules	Hours		Schedules	Hours		Schedules	Hours	
Normal	85 682:00		Normal	85 682:00		Normal	85 682:00		Normal	69 551:30	
Absent	0 0:00		Absent	0 0:00		Absent	0 0:00		Absent	0 0:00	

The Third section provides both the personal schedule and the employee's workgroup statistics

**Options**

**Approve**

**Deny**

**Approve** - the software will automatically schedule the benefit time  
**Deny** – No schedule changes will be made

The software notifies the employee through the ESS activity screen as seen below

Time Off Requests	
Status	Req
Approved	Vac
Denied	Per

Menu

Periods: Current Week

Calendar Dashboard

Sunday 26 Monday 27

Reg	Ovt	Reg	Ovt
7.40 100%	0.00 0%	103.05 99%	1.02 0%
		Overtime	1.02

Unauthorized Timecards  
17 Employees

## Authorizing Your Time Cards

Return to the daily Dashboard

The **Unauthorized Timecards** News Item shows the number of employees yet to be authorized

Use the Drop Down to open the news item

Unauthorized Timecards  
17 Employees

Alexander, David  
Benedict, Matthew A  
Burke, Adele  
Byelich, Mary  
Campione, Teresa

More Employees...

Authorize All

A brief list of employees will display as well as the *Authorize All* option.

By simply left clicking on **Authorize All** you will accomplish the authorization. This will lock your employee timecards and alert payroll/HR that you are ready for processing.

5	Nov-24	6:00a	2:00p
6	Nov-25		
7	Nov-26		

Time Card Locked

Summaries Time Off

The *Unauthorized Timecards* News Item will disappear and each individual time card will display a **Time Card Locked** message in the lower left hand corner of the time card

Attendance Enterprise  
Employee Attendance System

November 30 2000 18 Active, 3 In  
Pay Period is Mon Nov-27 00 to Sun Dec-

Welcome William Smi

Hide Menu

Menu

Locate an Employee


Employee Properties Employee Workgroup Assignments

Search [b] Return

Excel Print Preview

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK
Burke	Adele	103	TELMRK
Byelich	Mary	241	SALESC
Debuyser	Roseanne	202	OFFICE
Elizabeth	Baughman	271	TELMRK

## Locating an Employee

To locate an employee left click on the  **Locate Icon** or select **Find Employee** and type in the first part of a last or first name. The software will display the nearest matches allowing you to choose the employee by left clicking on any personal field

Pages Time Card Pay Periods Previous Period Employee Benedict, Matthew A

Personal Info. (TELMRK) Previous Period  
Time Card Current Period  
Schedules Next Period  
History  
Archives  
Benefits

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

Date	Schedule	Punches		Hours
		Open Conditions		
Nov-20	6:00a 2:00p	5:55a 1:54p	7:24	
Nov-21	6:00a 2:00p	5:56a 2:02p	7:30	
Nov-22	6:00a 2:00p	5:59a 2:00p	7:30	
Nov-23	6:00a 2:30p	6:00a 2:00p	7:30	
Nov-24	6:00a 2:00p	5:57a 2:09p	7:30	
Nov-25				
Nov-26				

A

This brings you directly to the employee timecard. Using the **Pages dropdown** you can select any of the other areas of Employee information.

Pay Periods can also be selected using the **Pay Periods** drop down.

Pages Personal Info. Pay Periods Current Period Employee Benedict, Matthew A

Personal Info. (TELMRK)  
Time Card  
Schedules  
History  
Archives  
Benefits

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

Date	Schedule	Punches		Hours
		Open Conditions		
Nov-27	6:15a 2:00p	6:05a 2:08p	7.75	
Nov-28	6:00a 2:00p	5:50a 2:08p	7.67	

B

### The Employee Schedule

When scheduling needs to be done beyond the current pay period, use the employee schedule screen.

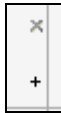
Left click on the **Pages** drop down and choose **Schedules**

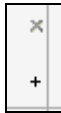
Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Week of Nov-27	6:15a/2p	6a/2p	6a/2p	6a/2p	Vacation 8.00	Off	Off	40.00
Week of Dec-4	6a/2p	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off	40.00
Week of Dec-11	Vacation 8.00	Vacation 8.00	Vacation 8.00	Vacation 8.00	Vacation 8.00	Off	Off	40.00
Week of Dec-18	6a/2p	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off	40.00
Week of Dec-25	Off	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off	32.00

C

The schedule for the entire current month will display



The  controls allow you to add or delete schedules to an individual day

**Edit Schedule for This Employee**

Date: 11/30/2000

Schedule Type: Standard Schedule

Benefit: Vacation

Start Time: 6:00a

End Time: 2:00p

Amount: 8.00

Department: TELMRK

Rate: 18.00

Schedule Style: Standard

Ok Cancel

## Schedule Editing

To edit an existing schedule, simply double left click on the current schedule to bring up the schedule properties. The date reflects the date you double clicked on but may be changed. You may add any start and end time needed.

**Edit Schedule for This Employee**

Date: 11/30/2000

Schedule Type: Standard Schedule

Benefit: Standard Schedule  
Flex Schedule  
Abs. Plan. Schedule

Start Time: 2:00p

End Time: 8:00

Department: TELMRK

Rate: 18.00

Schedule Style: Standard  
Standard  
Cold Weather Pay  
Under 48 Hr Notifica  
Schedule Style 3  
Schedule Style 4  
Schedule Style 5  
Schedule Style 6  
Schedule Style 7  
Schedule Style 8  
Schedule Style 9  
Schedule Style 10

In addition to the Schedule Start and End times, options exist for the *Schedule Type*, the *Department* worked as well as Special *Schedule Styles*

**Benedict, Matthew A (TELMRK)**

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Week of Nov-27	6a/2p	6a/2p	6a/2p	6a/2p	Vacation 8:00	Off	Off
Week of Dec-4	6a/2p	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off
Week of Dec-11	Vacation 8:00	Vacation 8:00	Vac 8:00	6a/2p	6a/2p	Off	Off
Week of Dec-18	6a/2p	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off
Week of Dec-25	Off	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off

Quick Schedules:

- 7:30a/3p (7:30a/3p)
- 8a/5p (8a/5p)
- 7:00a/ 3:30p
- 8:30a/ 5:30p

## Quick Schedules

Quick Schedule changes can be performed with a right click on a day and a left click on *Quick Schedules*. Now simply choose the preset schedule you desire.

The list of quick schedules is controlled by your system administrator

Benedict, Matthew A (TELMRK)						
Last Name	First Name	ID	Department			
Benedict	Matthew A	000115	TELMRK			
Week of	Monday	Tuesday	Wednesday	Thursday	Friday	
Nov-27	6a/2p	6a/2p	6a/2p	6a/2p	Vacation 8:00	
Dec-4	6a/2p	6a/2p	7:30a/3p	6a/2p	6a/2p	
Dec-11	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	

The *change in schedule color* indicates this schedule has been edited

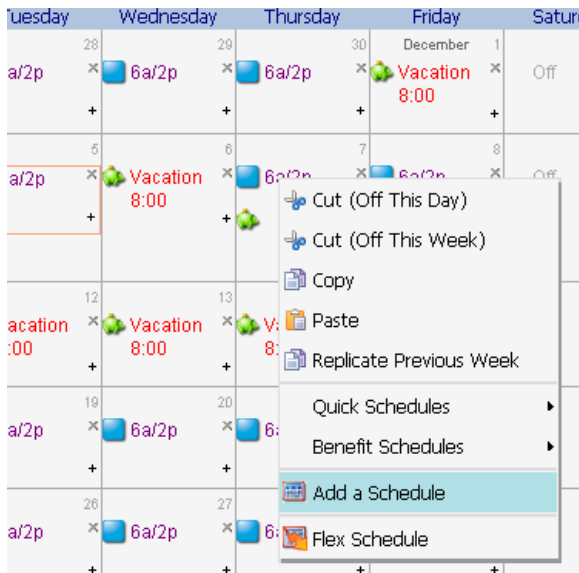
Last Name	First Name	ID	Department						
Benedict	Matthew A	000115	TELMRK						
Week of	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday		
Nov-27	6a/2p	6a/2p	6a/2p	6a/2p	Vacation 8:00	Off	Off		
Dec-4	6a/2p	6a/2p	7:30a/3p	6a/2p	6a/2p	Off	Off		
Dec-11	Vacation 8:00	Vacation 8:00	Vacation 8:00	6a/2p	6a/2p	Off	Off		
Dec-18	6a/2p	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off		
Dec-25	Off	6a/2p	6a/2p	6a/2p	6a/2p	Off	Off		

**Planned Absences**

Planned Absences can also be scheduled with a right click on a day and a left click on *Benefit Schedules*. Choose from the list of preset benefit types.

Last Name	First Name	ID	Department			
Benedict	Matthew A	000115	TELMRK			
Week of	Monday	Tuesday	Wednesday	Thursday		
Nov-27	6a/2p	6a/2p	6a/2p	6a/2p		
Dec-4	6a/2p	6a/2p	Vacation 8:00	6a/2p		
Dec-11	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00		

The schedule is overwritten with the *benefit time*.



## Partial Day Planned Absence

Partial day planned absences are entered with a right click on a day and a left click on *Add a Schedule*.

**Add a New Schedule for This Employee**

Date: 12/7/2000

Schedule Type: Abs. Plan. Schedule

Benefit: Vacation

Start Time: 8:00a

End Time: 5:00p

Amount: 4.00

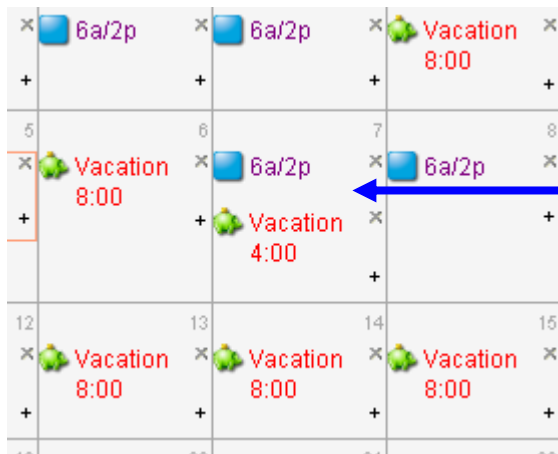
Department: TELMRK

Rate: 18.00

Schedule Style: Standard

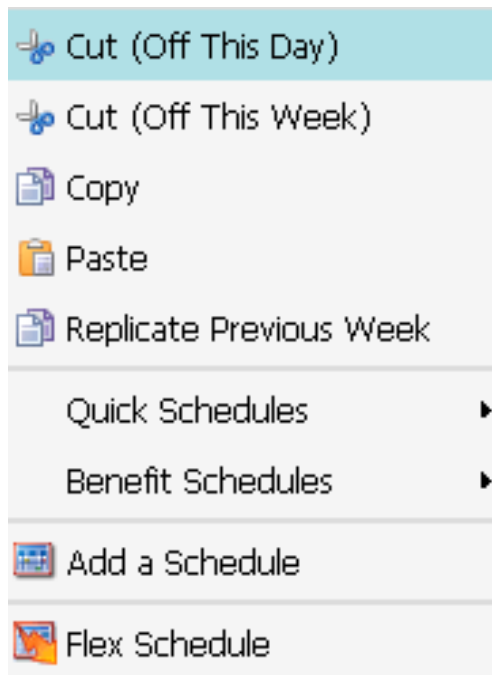
Ok Cancel

Select *Abs. Plan. Schedule*, the benefit type and the number of hours.



The result is a *partial day of planned absence* with the *original schedule* remaining.

Employee will be flagged as “Left Early” if the schedule remains unchanged.



### Other Scheduling Options <sup>A</sup>

\**Cut (Off This Day)* removes the schedule from the selected day

\**Cut (Off This Week)* removes the schedule from the week of the selected day

\*The Cut will **not** place the schedule in the clip board

*Copy* copies the schedule to the clip board

*Paste* pastes from the clip board (individual cells only)

*Replicate Previous Week* copies the schedules to the week you are on from the previous week.

*Flex Schedule* adds the flex schedule

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

Basic		Personal		Private		Address		Workgroup		Active Status		Hourly Status	
Last Name	Benedict												
First Name	Matthew A												
Middle Initial													
ID Number	000115												
Badge	109												
Pay Class	8hr Day/30m Lunch												
Pay Class Eff. Date	Mon May-07 90												
Clock Group	Drivers Only												
Schedule Pattern	06:00 to 14:00 (M-F)												
Sch. Patt. Eff Date	Mon Jun-01 98												
Date of Hire	Fri Dec-07 90												

### Personal Information <sup>B</sup>

Personal information may be limited by your password access. The areas listed here may not all be available to the supervisor.

One area of concern is the **Pay Class** assignment. The pay class sets the calculation rules for this employee. In the example, the employee is assigned to a pay class that pays overtime over 8 hours per day and auto deducts a 30 minute lunch. The labels on your pay classes will be customized to be familiar to your particular company rules.

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

Basic		Personal		Private		Address		Custom		Rates		V	
Social Security Number	000-00-0000												
eMail Address	sample@sample.com												
ESS Pin	109												

### Private Tab <sup>C</sup>

The private tab will include the Social Security number if needed for payroll processing. The eMail Address and ESS PIN number is only used when the customer is utilizing the Employee Self Service Module.

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

▶ Basic ▶ Personal ▶ Private ▶ Address ▶ Custom ▶ **Rates** ▶ Workgroup ▶ Active Status

**Current Rate (Change )** ←

Rate	Pay Type	Effective Date	Comments
18.00	Hourly	Wed Dec-23 92	Performance Raise

**Rate History**

Rate	Pay Type	Effective Date	Comments
14.50	Hourly	Mon May-07 90	Starting Pay
<a href="#">Remove</a>			
16.25	Hourly	Mon Aug-20 90	Good Review
<a href="#">Remove</a>			

A

### Rates Tab

Employee pay rates are tracked for the current rate and previous rates. To change an employee pay rate left click on **(Change)**

**Change Rate of Pay**

**Pay Type**

**Rate of Pay**

**Effective Beginning**

**Comments**

B

Add the rate, the effective date and any comments you desire.

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

▶ Basic ▶ Personal ▶ Private ▶ Address ▶ Custom ▶ Rates ▶ **Workgroup** ▶ Active St

**Current Assignment (Change )**

LOC-DEPT-LBR	Effective Date	Comments
MP-TELMRK-DI	Mon May-07 90	Bumped by Sally

**Assignment History**

LOC-DEPT-LBR	Effective Date	Comments
MP-DRIVER-DI <a href="#">Remove</a>	Tue Jan-01 80	

C

### Workgroup Assignment

The employee's home workgroup is assigned under the *Workgroup* Tab

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

▶ Basic ▶ Personal ▶ Private ▶ Address ▶ Custom ▶ Rates ▶ Workgroup ▶ **Active Status**

**Current Active Status (Change )** ←

ActiveStatus	Condition	Effective Date	Comments
Active	Reviewed	Mon Aug-07 00	Passed 6 month review with perfect attendance

**Active Status History**

ActiveStatus	Condition	Effective Date	Comments
Active <a href="#">Remove</a>	Probation	Sat Feb-07 98	Hired for Probationary period
Active <a href="#">Remove</a>	Reviewed	Fri May-08 98	Taken off Probation with perfect attendance
Active <a href="#">Remove</a>	Reviewed	Fri Aug-07 98	Passed 6 month review with 1 tardy and 1 absense in last 3 months

D

### Active Status

The employee is designated as *Active* or *Terminated*

Active conditions can be used to track employee reviews, probationary periods etc.

Use **(Change)** to edit the employee active status and/or condition

### Transfer Rates

Basic Personal Private Address Custom Rates Workgroup

**Transfers**

Add Personal Workgroup/Rate Entry

OFFICE-DI	Rate	0.5000	<a href="#">Change</a> <a href="#">Remove</a>
	Action	Addition To	
DAYWH-DI	Rate	1.1000	<a href="#">Change</a> <a href="#">Remove</a>
	Action	Multiplicative Factor	

The transfer table stores rate modifications for employees who receive modified rates for work in specific workgroups.

### Employee History

Pages History Employee Benedict, Matthew A Prev. Year Periods Prev. & Current Month

Recent Activity Department TELMRK

**Benedict, Matthew A (TELMRK)**

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Sep 25 '00	26	27	28	29	30	1
Oct 2 '00	ABS 8.00	TDY 0.02	4	5	ABS 8.00	6
Oct 9 '00	10	11	TDY 0.05 LFE 0.07	12	TDY 0.05 LFE 0.08	13
Oct 16 '00	LFE 0.03	17	LFE 0.03	18	LFE 0.10	19
Oct 23 '00	24	LFE 0.05	25	TDY 0.05	26	ABS 8.00
Oct 30 '00	TDY 0.02	31	1	2	TDY 0.05	3
Nov 6 '00	LFE 0.02	7	8	9	TDY 0.02	10
Nov 13 '00	TDY 0.02	14	ABS 8.00	15	16	17
Nov 20 '00	LFE 0.10	21	22	23	24	25

The Calendar history screen displays a preset group of exceptions and pay designations for the selected period.

**Benedict, Matthew A (TELMRK)**

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Sep 25 '00	26	27	28	29	30	1
Oct 2 '00	ABS 8.00	TDY 0.02	4	5	ABS 8.00	6
Oct 9 '00	10	11	TDY 0.05 LFE 0.07	12	TDY 0.05 LFE 0.08	13
Oct 16 '00	LFE 0.03	17	LFE 0.03	18	LFE 0.10	19
Oct 23 '00	24	LFE 0.05	25	TDY 0.05	26	ABS 8.00
Oct 30 '00	TDY 0.02	31	1	2	TDY 0.05	3
Nov 6 '00	LFE 0.02	7	8	9	TDY 0.02	10
Nov 13 '00	TDY 0.02	14	ABS 8.00	15	16	17
Nov 20 '00	LFE 0.10	21	22	23	24	25

**Benedict, Matthew A (TELMRK)**

Date	Transactions	Amount	Schedule	Description	Rate	Exceptions
Mon-Oct-16-00	7:49 8:00a	7.49	6:00a/2:00p	Left Early	0.03	LFE 0.03
Tue-Oct-17-00	7:49 8:00a	7.49	6:00a/2:00p	Left Early	0.03	LFE 0.03
Wed-Oct-18-00	7:49 8:00a	7.49	6:00a/2:00p	Left Early	0.10	LFE 0.10
Thu-Oct-19-00	7:49 8:00a	7.49	6:00a/2:00p	Left Early	0.08	LFE 0.08
Fri-Oct-20-00	7:49 8:00a	7.49	6:00a/2:00p	Left Early	0.02	LFE 0.02
Sat-Oct-21-00	7:49 8:00a	7.49	6:00a/2:00p	Left Early	0.02	LFE 0.02

**Summaries**

Mon	Tue	Wed	Thu	Fri	Sat	Sun	Tot
REG	REG	REG	REG	REG	REG	REG	REG

Each cell is *linked to the appropriate archived time* card to allow the user to left click on a cell and enter into the archive time card for the period with the day in question

Pages Archives Employee Benedict, Matthew A Pay Periods Mon Nov-27 00 to Sun Dec-03 00

**Benedict, Matthew A (TELMRK)**

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

**Date Transactions**

Date	In	Out	In	Out	Amount	Schedule
Mon Nov-27 00	6:05a	2:08p			7:33	6:00a/2:30p
BOB ADJ TRANS TIME FROM Mon Nov-27 00 5:50a TO Mon Nov-27 00 6:05a (Wed BILL REVIEWED Tardy Mon Nov-27 00 (Tue Sep-19 06 9:31a)						
Tue Nov-28 00	5:50a	2:08p			7:38	6:00a/2:30p
Wed Nov-29 00	5:22a	2:00p			9:08	6:00a/2:30p
BOB ADJ TRANS TIME FROM Wed Nov-29 00 5:52a TO Wed Nov-29 00 5:22a (Thu BOB ADJ TRANS TIME FROM Wed Nov-29 00 1:59p TO Wed Nov-29 00 2:00p (Fri A BILL ADD 1:00 TO Wed Nov-29 00 (Supervisor Permission) (Thu Nov-30 00 10:28a)						
Thu Nov-30 00	6:00a				0:00	6:00a/2:00p
BOB DEL PUN Thu Nov-30 00 2:00p (Thu Aug-18 05 8:45p) BOB ADJ TRANS TIME FROM Thu Nov-30 00 6:03a TO Thu Nov-30 00 5:30a (Fri Aug BOB ADJ TRANS TIME FROM Thu Nov-30 00 5:30a TO Thu Nov-30 00 6:00a (Wed J BROWSER TRANSFER TO MP-HELPER-DI ON Thu Nov-30 00 AT 9:15a (Thu Nov-30 00 ESSUSER TRANSFER TO MP-DRIVER-DI ON Thu Nov-30 00 AT 9:24a (Thu Nov-30 00 BOB DEL PUN Thu Nov-30 00 9:15a (Wed Sep-27 06 10:15p) BOB DEL PUN Thu Nov-30 00 9:14a (Wed Sep-27 06 10:15p)						

## Employee Archives

The Archive *Pay Period* drop down provides access to all archived time cards. It is simple to look up an old time card from 3 weeks ago, three months ago or even three years ago!

Pages Benefits Employee Benedict, Matthew A Department TELMRK

**Benedict, Matthew A (TELMRK)**

Last Name	First Name	ID	Department
Benedict	Matthew A	000115	TELMRK

► Vacation ► Sick ► Personal ► Jury Duty ► Unpaid Off ► Brvment ► Holiday

Vacation activity from Sat Jan-01 00 to Sun Dec-31 00 (earliest adjustment date is May-18-1998)

Date	Credit	Debit	Balance
Sat Jan-01 00			69:20
Sat Jan-01 00		13:20	82:40
Wed Jan-05 00		8:00	74:40
Fri Jan-07 00		4:00	70:40
Wed Jan-12 00		4:00	66:40
Tue Feb-01 00	13:20		80:00
Thu Feb-03 00		8:00	72:00
Wed Feb-09 00		2:00	70:00
Wed Mar-01 00	13:20		83:20
Mon Mar-13 00		8:00	75:20
Thu Mar-16 00		2:00	73:20
Sat Apr-01 00	13:20		86:40
Fri Apr-07 00		8:00	78:40
Mon May-01 00	13:20		92:00
Thu Jun-01 00	13:20		105:20
Wed Jun-07 00		8:00	97:20

## Employee Benefits

Each Benefit time has a separate tab and displays a 12 month running total of Credits, Debits and running balance

Menu

Employee Schedules

Employees	Monday	Tuesday	Wednesday	Thursday	Friday
Alexander, David 216 300 OFFICE	Off	Off	Off	Off	Off
Benedict, Matthe... 000115 109 TELMRK	6a/2p	6a/2p	6a/2p	Off	6a/2p
Burke, Adele 103 257 TELMRK	6a/2:30p	6a/2:30p	6a/2:30p	6a/2:30p	6a/2:30p
Bvelich, Mary 241 265 SALESC	6a/2:30p	6a/2:30p	6a/2:30p	6a/2:30p	6a/2:30p
Campione, Teresa 140	6a/2:30p	6a/2:30p	6a/2:30p	6a/2:30p	6a/2:30p

## Group Scheduling

Left click on *Employee Schedules*

All the features of an employee individual schedule are available on the Group Schedule page

A

Employee Schedules

### Additional Group Schedule Options

- Remove Selection of Schedules
- Copy Selected Area
- Paste Previous Copy Selection
- Previous Week Go to the Previous Week
- Next Week Go to Next Week
- Prev. Page Go to Previous Page
- Next Page Go to Next page
- Page 1 of 1 Currently Viewed Page

B

Scheduled Time Off

Employees	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Benedict, Matthe... 000115 109 TELMRK	6a/2p	6a/2p	Vacation 8:00	6a/2p	6a/2p	Off
Burke, Adele 103 257 TELMRK	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	Off
Elizabeth, Bauch... 271 271 TELMRK	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	Off
Louis, Doyle 247 268 SALESC	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	Vacation 8:00	Off

### Scheduled Absences Next Week

This Schedule screen displays any employee that has a scheduled absence next week. An employee will appear if any part of their schedule includes a scheduled absence.

C

Department Hours

Department	REG	OVT	RG2	VAC	Totals
<b>Totals</b>	<b>262.50</b>	<b>13.85</b>	<b>22.15</b>	<b>48.00</b>	<b>346.50</b>
OFFICE	108.93	5.60	6.50		121.03
SALESC	47.97	1.73		40.00	89.70
TELMRK	105.60	6.52	15.65	8.00	135.77

### Summary Sheets

You will have a list of available summary sheets to choose from [Summary Sheets](#)

- ▶ [Department Hours](#)
- ▶ [Employee Hours](#)
- ▶ [Employee Exceptions](#)

The example to the left is the Department Hours Summary Sheet

A

Periods: Current Period

Departments: **Previous Period**

	OVT	RG2
Totals	13.85	22.15
OFFICE	5.60	6.50
SALESC	1.73	
TELMRK	6.52	15.65

OFFICE Previous Week  
SALESC Current Week  
TELMRK Next Week  
Previous Fortnight  
Current Fortnight  
Next Fortnight  
Previous Month  
Current Month  
Next Month  
Previous Year  
Current Year  
Next Year  
Last 12 Months (FMLA)  
Last 12 Months from End of Current Pe  
Last 12 Months from End of Next Peric  
Last 12 Months from End of Current M  
Last 12 Months from End of Next Mont  
Prev. & Current Calendar Year  
Prev. & Current Period  
Prev. & Current Month  
Current & Next Month  
Two Days Ago

You may choose from a variety of date ranges to view.

Options include a Print Preview and a link to populate an Excel spreadsheet

B

Email Search Select Text

**Department Hours**

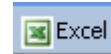
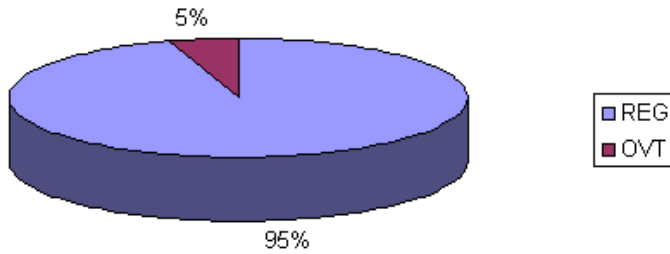
Department Hours

Department	REG	OVT	RG2	VAC	Totals
OFFICE	108.93	5.60	6.50		121.03
SALESC	47.97	1.73		40.00	89.70
TELMRK	105.60	6.52	15.65	8.00	135.77

The Print Preview will display the report in Adobe PDF format. You may also Save, Print or Email the report

Email

	A	B	C	D	E	F	G	H	I
1	Department	REG	OVT	RG2	VAC	Totals			
2	Totals	262.5	13.85	22.15	48	346.5			
3	OFFICE	108.93	5.6	6.5		121.03			
4	SALESC	47.97	1.73		40	89.7			
5	TELMRK	105.6	6.52	15.65	8	135.77			
6									
7									
8									
9									
10									
11									
12									
13									
14									
15									
16									
17									
18									
19									
20									
21									
22									
23									
24									



The Export to Excel

Provides the user with a direct data transfer to an excel spreadsheet.

**WARNING!!**

The results can get quite graphic!

A

### Reports

Report Title		Description
Time Card Report		Time Card Report
Period Totals Report		Period Totals Report
Exception Report		Exception Report
Schedules		Schedules

### Reports

Reports

▶ Reports

Reports are categorized into time frames and report types using multiple Report Group Tabs

B

### Time Card Report

#### Select Employees

Choose...

Select Employees to Include

#### Select Workgroups

Choose...

Select Workgroups to Include

#### Select Pay Class.

Show only Employees Belonging to Selected Pay Class.

#### Save This Report to My Reports

Enable to save this report with your selected options and place into the My Reports area.

#### Report Name

Give this report a name. It will be referenced by this name in the future.

#### Group Name

The report group where this report will be placed. Duplications are replaced by this version.

#### View Report Now

Build and present the report immediately. The report will be shown in the view area and presented as a PDF document.

#### eMail Report

Build and email the report immediately. The report will be sent as a PDF document attachment.

Click Run Report to continue this process and build your report.

Run Report

### Select Employees

You may select a single employee or a combination of employees.

OFFICE
<input checked="" type="checkbox"/> Alexander, David
<input checked="" type="checkbox"/> Campione, Teresa
<input checked="" type="checkbox"/> Debuyser, Roseanne
<input checked="" type="checkbox"/> Gerner, Anna
<input checked="" type="checkbox"/> Goral, Gina Marie
<input checked="" type="checkbox"/> Hoesle, Mary
<input checked="" type="checkbox"/> Romano, Susan

By Left Clicking on the **Header Label** you will select all employees listed

### Select Workgroup

You may select a single Workgroup or any combination of Workgroups

Department
<input checked="" type="checkbox"/> DAYWH
<input checked="" type="checkbox"/> DAYHP
<input checked="" type="checkbox"/> DISTMR

### Select Pay Class

You may select a single pay class or all Pay Classes

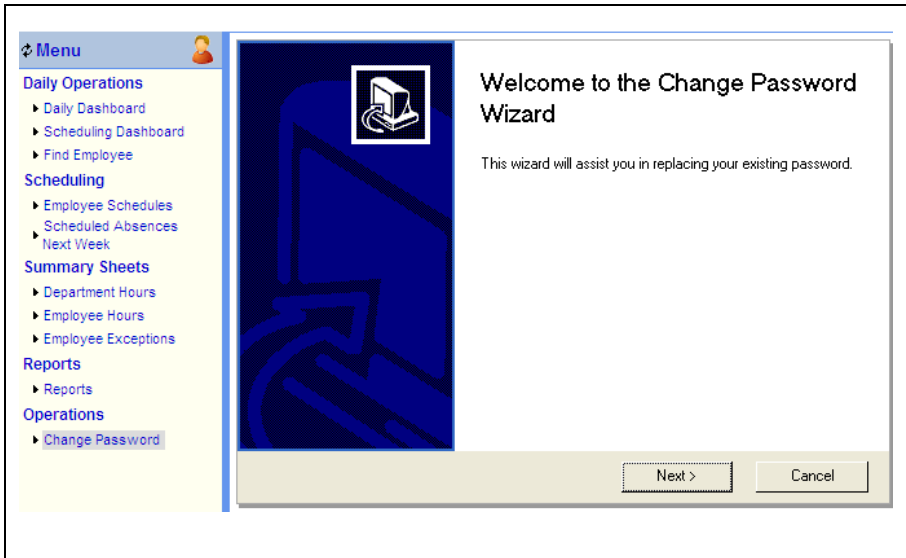
Select Pay Class.
All
8hr Day/No Lunch
8hr Day/30m Lunch
Sch Ovt/No Lunch
10hr Day/30m Lunch
Sch Ovt/30m Lunch
10hr Day/No Lunch
Telemarketing
8hr Ngjt/No Lunch
8hr Day/Ngjt/30m Lunch
Temps

You may **Save** the report to “My Reports” as well as choose the **Report Name** for the task and the **Report Group** it will be assigned.

You may **View** the Report or **eMail** the report.

Run Report

Select to finish



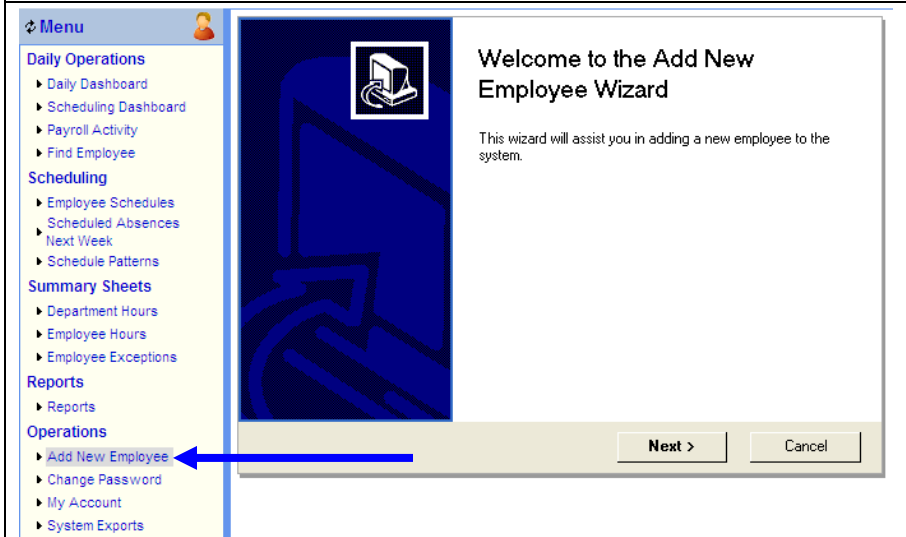
A

## Change Your Password

Operations  
Change Password

Left click on Change Password  
 And follow the Wizard

## Adding Employees

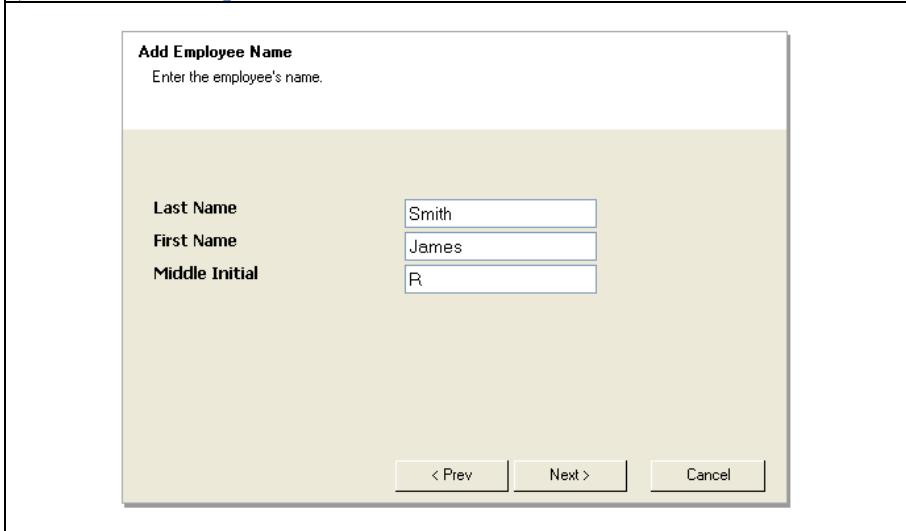


B

Select *Add New Employee* from the *Operations* list.

The Add New Employee Wizard will guide you through the process

Choose *Next*



C

Enter the employee information and select *Next*


**Add Employee Name**  
Enter the employee's name.

**Employee ID**

**Date of Hire**

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

< Prev    Next >    Prev Mon    Next Mon    Ok

Enter the Employee ID number and date of Hire. Use the  to bring up the calendar.

Note: The ID number is the link to your payroll and must match your employee payroll ID exactly.

A

**Add Social Security (Identity) Number**  
Enter the employee's SSN(SIN) number.

**Employee SSN(SIN)**

< Prev    Next >    Cancel

Add the employee social security number if desired

B

**Select a Badge Number**  
Choose a badge number for this employee.

**Employee Badge**

< Prev    Next >    Cancel

Add the employee badge number.

This is also the number used to “clock in” on the Employee Self Service Module

C

**Select a Department**  
Choose this employee's home assignment.

Department

DAYWH  
DAYWH  
DAYHP  
DISTMR  
DFTSP  
DRVOVR  
DRIVER  
EXECUT  
HELPER  
INSTMG  
INVENT  
LSHUTL  
LWAREH  
MKTMGR  
MISC

Cancel

A  
Select the employee's home Department from drop down list.

**Select a Pay Class**  
Choose a pay class for this employee.

Pay Class

8hr Day/No Lunch  
8hr Day/No Lunch  
8hr Day/30m Lunch  
Sch Ovt/No Lunch  
10hr Day/30m Lunch  
Sch Ovt/30m Lunch  
10hr Day/No Lunch  
Telemarketing  
8hr Ngt/No Lunch  
8hr Day/Ngt/30m Lunch  
Temps

< Prev    Next >    Cancel

B  
Select the correct pay class (rule set) for this employee

**Select a Clock Group**  
Choose a clock group for this employee.

Clock Group

Drivers Only  
Drivers Only  
Warehouse Only  
All Clocks

< Prev    Next >    Cancel

C  
Choose a clock group where applicable.

**Select a Schedule Pattern**  
Choose a schedule pattern for this employee.

**Schedule Pattern** 05:00 to 13:00 (M-F) ▾  
**Schedule Pattern Begins** 11/30/2000 ▾

< Prev    Next >    Cancel

<sup>A</sup>  
Select the Schedule Pattern for the employee and the effective date.

Note: The effective date should not be prior to the employee's start date.

**Select an Hourly Status Type**  
Choose a status type for this employee.

**Hourly Status Type** Part Time ▾  
**Status Begins** 11/30/2000 ▾

< Prev    Next >    Cancel

<sup>B</sup>  
Select the Hourly Status Type and the effective date.

**Rate of Pay**  
Enter this employee's Rate of Pay.

**Pay Type** Hourly ▾  
**Rate of Pay** 8.00  
**Effective Beginning** 11/30/2000 ▾

< Prev    Next >    Cancel

<sup>C</sup>  
Select the Pay Type (Hourly or Salary) the employee's rate of pay and the effective date for the rate.

<div data-bbox="228 121 906 600"> <p><b>Address Information</b> Enter employee's address information.</p> <p><b>Address Line 1</b> <input type="text" value="123 main Street"/></p> <p><b>Address Line 2</b> <input type="text"/></p> <p><b>Address Line 3</b> <input type="text"/></p> <p><b>City</b> <input type="text" value="Anytown"/></p> <p><b>State/Prov</b> <input type="text" value="MI"/></p> <p><b>ZIP/PC</b> <input type="text" value="49000"/></p> <p><input style="margin-right: 10px;" type="button" value=" &lt; Prev "/> <input style="margin-right: 10px;" type="button" value=" Next &gt; "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/></p> </div>	<p style="text-align: right;">A</p> <p>Key in the employee address information.</p>
<div data-bbox="228 655 906 1134"> <p><b>eMail Address</b> Enter the employee's eMail address.</p> <p><b>eMail address</b> <input type="text" value="hereiam@yahoo.com"/></p> <p><b>PIN</b> <input type="text" value="1234"/></p> <p><input style="margin-right: 10px;" type="button" value=" &lt; Prev "/> <input style="margin-right: 10px;" type="button" value=" Next &gt; "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/></p> </div>	<p style="text-align: right;">B</p> <p>Key in the employee's email address if desired and the Personal Identification Number.</p> <p>Note: The PIN number is used in conjunction with the badge number to enter into the ESS Module.</p>
<div data-bbox="228 1192 906 1671"> <p><b>Self Service Permissions</b> Select ESS permissions for this employee.</p> <p><b>ESS Authorizations</b></p> <ul style="list-style-type: none"> <li>Employee May Access Account via</li> <li>Employee May Punch IN/OUT</li> <li>Employee May Transfer Workgroup</li> <li>Employee May Indicate Schedule W</li> <li>Employee May Enter Daily Worked I</li> <li>Employee May Authorize Own Time</li> <li>Employee May Enter Time Off (Non</li> <li>Employee May Request Time Off</li> </ul> <p><input style="margin-right: 10px;" type="button" value=" &lt; Prev "/> <input style="margin-right: 10px;" type="button" value=" Next &gt; "/> <input style="margin-right: 10px;" type="button" value=" Cancel "/></p> </div>	<p style="text-align: right;">C</p> <p>ESS Users Only</p> <p>Select the permissions for this employee's access to the Employee Self Service Module.</p> <p>Note: Hold down the Ctrl key to make multiple selections.</p>

**Self Service Cellular Permissions**  
Select ESS cellular permissions for this employee.

**ESS Cell Authorizations**

Employee Cell Phone Activity Allowed  
Employee May Enable Account on First  
Employee Punches IN/OUT on Usage

< Prev   **Next >**   Cancel

Self Service Cellular Permissions <sup>A</sup>

**Phone Numbers and Contact Information**  
Enter employee's contact information.

**Primary Phone Number**   616 599-9999  
**Secondary Phone Number**   248 500-0000  
**Emergency Contact**   MOM 517 333-3333

< Prev   Next >   Cancel

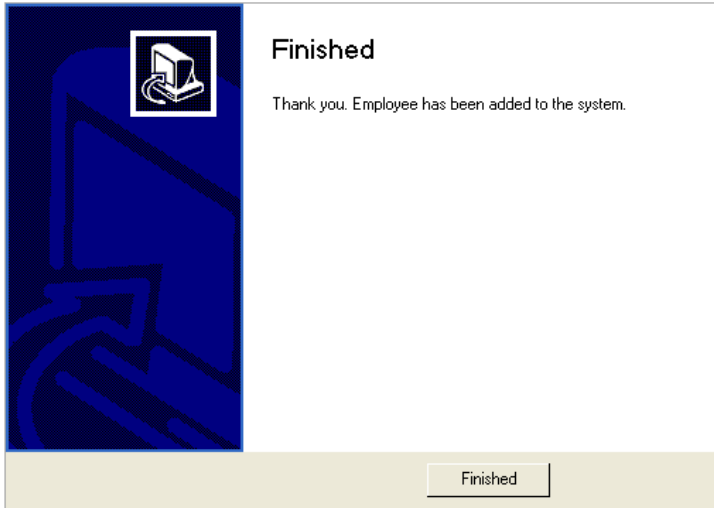
Key in the employee phone and emergency contact information. <sup>B</sup>

**Active Status Information**  
Enter employee's Active Status information.

**Active Status**   Active  
**Active Condition**   Probation  
**Terminated Condition**   Normal  
Probation  
Reviewed  
Training

< Prev   Next >   Cancel

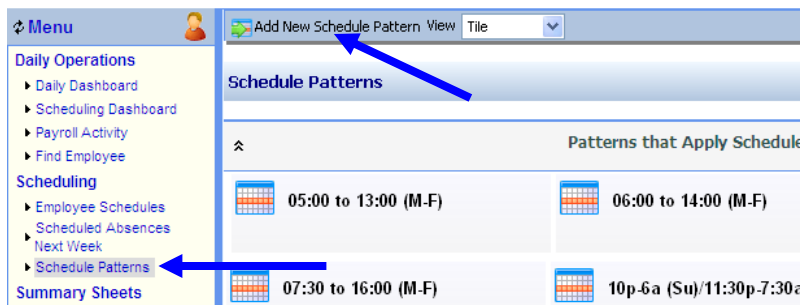
Choose the Active Condition for the employee. <sup>C</sup>



Finished!!!

A

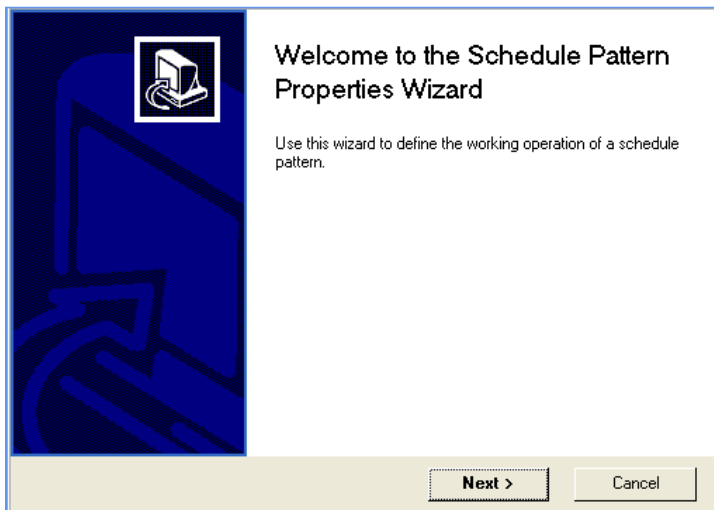
## Schedule Patterns



Select *Schedule Patterns* from the Scheduling menu.

Next select *Add New Schedule Pattern*

B



The Schedule Pattern Properties Wizard will guide you through adding a new pattern.

C

**Schedule Pattern Type**

Select how this schedule pattern will be used.

- Pattern Applies Schedules**  
Pattern will apply its own schedules to assigned employees on a regular basis.
- Pattern Copies Pay Period Schedules**  
Pattern will simply copy current period schedules forward each pay period.
- Pattern Adjusts Existing Schedules Forward**  
Pattern will copy existing employee schedules forward week by week.

< Prev    Next >    Cancel

Select the Appropriate Pattern Type

A

**Repeat of Schedules Period**

Select Duration of Repeat Pattern.

- Weekly Pattern**  
A set of weekly schedules will be built to represent this pattern.
- BiWeekly Pattern**  
A set of biweekly schedules will be built to represent this pattern.
- Other**  
Pattern is neither weekly nor biweekly in duration.

< Prev    Next >    Cancel

Select the Pattern repeat duration.

B

**Life of Schedule Pattern**

Select dates where this schedule pattern is valid.

**Pattern Begins**    1/2/2000

**Ending Rules**    Pattern Runs Forever

**Pattern Ends**    12/31/2099

< Prev    Next >    Cancel

Select the Pattern start date and ending rules.

Note: the start date should coincide with the pay period start day.

C

**Beginning of Week**  
Select the day of the week that defines the beginning of the schedule pattern period.

Pattern Repeats Every

< Prev    Next >    Cancel

A  
Select the day that defines the start of your pay period.

**Schedule Pattern Properties**  
Apply the appropriate values to each option.

Place Schedules On Holidays

Use Emp. Workgroup

Use Emp. Rate of Pay

< Prev    Next >    Cancel

B  
Select the appropriate value for each option.

**Future Application of Schedules**  
Define operating rules when schedule patterns are re-applied to employees.

Days to Build from Today

Apply Beginning From

Days from Current Date

- Default
- Week Before Beginning of Previous Pay Period
- Beginning of Previous Pay Period
- Beginning of Current Pay Period
- Beginning of Next Pay Period
- Beginning of Pay Period after Next Pay Period
- Beginning x Days from Current Date

< Prev    Next >    Cancel

C  
Select the number of days to build ahead and Select the pattern repeating start day.

Note: When using Leave Management, the employee may only request leave for the number of days ahead that schedules were built. (i.e. one year ahead would require a value of 365)

**Visual Presentation**  
Select the first day of week for visual presentation.

Weeks Begins On

< Prev    Next >    Cancel

A  
Select your schedule start day (should coincide with your pay period start day)

**Week by Week Schedule Forwarding**  
Select beginning of week definition when forwarding existing employee schedules.

Name

Description

< Prev    Next >    Cancel

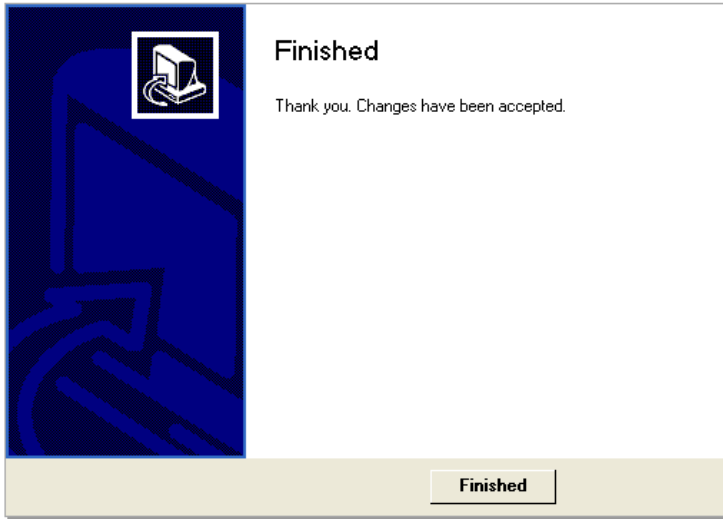
B  
Label the new schedule pattern with a name and description.

**Application**  
Select desired save and application options.

**Save Only**  
Save schedule pattern properties.

< Prev    **Next >**    Cancel

C  
Select the Save pattern properties option.



Select Finished!!

Now lets move on to the setup and assigning of the schedule pattern.

A

Return to Schedule Patterns Render Standard Apply Schedule Pattern Properties Name/Description Assign Remove Remove Schedule Pattern

**1st Shift**

1st Shift Production

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Week 1	7a/3:30p x +	+ +	+ +	+ +	+ +	+ +	+ +	8:00

Last Name First Name ID Schedule Pattern Effective Date

Using the + on each day, setup the schedule times as seen here on Monday.

B

Return to Schedule Patterns Render Standard Apply Schedule Pattern Properties Name/Description Assign Remove Remove Schedule Pattern

**1st Shift**

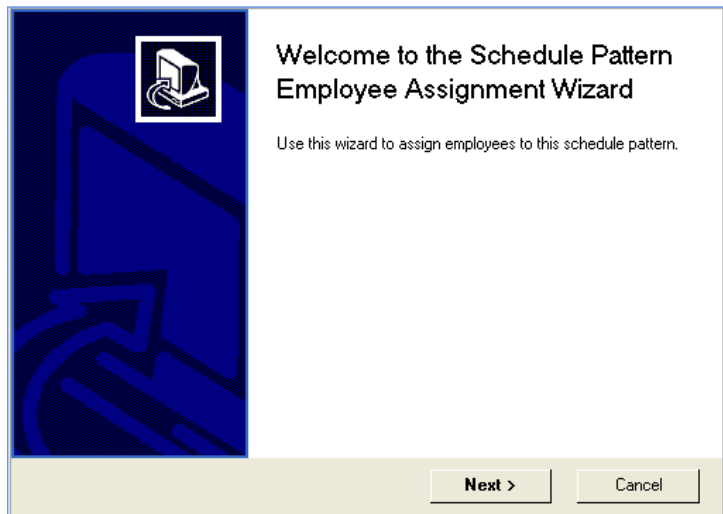
1st Shift Production

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Week 1	7a/3:30p x +	7a/3:30p x +	7a/3:30p x +	7a/3:30p x +	7a/3:30p x +	+ +	+ +	40:00

Last Name First Name ID Schedule Pattern Effective Date

When finished, select *Assign*

C



The *Schedule Pattern Employee Assignment Wizard* will guide you through the process.

D

### Employees to Assign

Determine the group of employees.

- Currently Unassigned**  
Select employees who are currently not assigned to any schedule pattern.
- Currently Assigned Elsewhere**  
Select employees who are currently assigned to another schedule pattern.
- Free Form Selection**  
Select from all employees.

< Prev      Next >      Cancel

Choose the type of employee to assign to this pattern.

Note: Free Form Selection allows you to choose any employee in any schedule state.

A

### Select Employees

Select the employees to assign to this schedule pattern

OFFICE	SALESC	TELMRK	DRIVE
<input type="checkbox"/> Alexander, David	<input checked="" type="checkbox"/> Byelich, Mary	<input checked="" type="checkbox"/> Benedict, Matthew A	<input type="checkbox"/> Adolph, Jose
<input type="checkbox"/> Campione, Teresa	<input checked="" type="checkbox"/> Furey, John	<input checked="" type="checkbox"/> Burke, Adele	<input type="checkbox"/> Camm, Jose
<input type="checkbox"/> Debuyser, Roseanne	<input type="checkbox"/> Louis, Doyle	<input type="checkbox"/> Elizabeth, Baughman	<input type="checkbox"/> Capanna, M
<input type="checkbox"/> Gerner, Anna	<input type="checkbox"/> Ryan, Timothy	<input type="checkbox"/> Jessica, Lee	<input type="checkbox"/> Castelberg, J
<input type="checkbox"/> Goral, Gina Marie		<input type="checkbox"/> Newman, Dawn	<input type="checkbox"/> Cavanaugh, J
<input type="checkbox"/> Hoesle, Mary		<input type="checkbox"/> Patel, Kristina	<input type="checkbox"/> Clark, Josep
<input type="checkbox"/> Romano, Susan			<input type="checkbox"/> Collins, Sanf
			<input type="checkbox"/> Crawford, Th
			<input type="checkbox"/> Cummings, T
			<input type="checkbox"/> Fitzsimmons, J
			<input type="checkbox"/> Frank, Jame
			<input type="checkbox"/> Friel Jr, Jame
			<input type="checkbox"/> Galbraith, Al
			<input type="checkbox"/> Harrell, Norri
			<input type="checkbox"/> Harvey, Ricl
			<input type="checkbox"/> Hazlett, Antl
			<input type="checkbox"/> Hellmig, Will

Select the employees from each workgroup to assign to this schedule pattern.

B

### Apply Date

Select the date upon which the schedules from this schedule pattern will be applied.

#### Apply Beginning

11/26/2000

November 2000

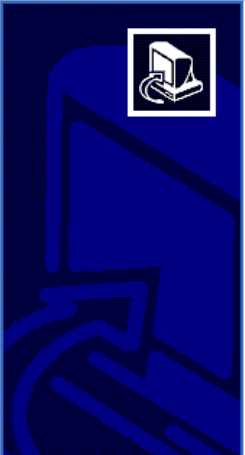
Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Prev Mon    Next Mon    Ok

< Prev      Next >      Cancel

Choose the start date fro the pattern schedule.

C

<div data-bbox="203 121 933 651"> <p><b>Existing Schedules</b> Select how to manage existing employee schedules.</p> <p><input checked="" type="radio"/> <b>Change Existing Pattern Schedules to This Pattern</b> Existing schedules from earlier patterns are replaced.</p> <p><input type="radio"/> <b>Change All Schedules to This Pattern</b> Existing schedules from earlier patterns AND manager applied schedules are replaced.</p> <p>&lt; Prev    Next &gt;    Cancel</p> </div>	<p style="text-align: right;">A</p> <p>Choose how to handle existing schedules.</p> <p><b>Caution:</b> Choosing <i>Change All Schedules to This Pattern</i> will overwrite any pre scheduled benefit time.</p>
<div data-bbox="203 703 933 1228"> <p><b>Confirmation</b> Confirm the employees to be added to this schedule pattern.</p> <p><b>Notes</b></p> <div data-bbox="511 882 852 1018" style="border: 1px solid gray; padding: 5px;"> <p>4 Employee(s) selected to be added to this schedule pattern.</p> </div> <p>&lt; Prev    Next &gt;    Cancel</p> </div>	<p style="text-align: right;">B</p> <p>The software requires a confirmation on the number of employees the schedule change will effect.</p>
<div data-bbox="203 1281 933 1795">  <p><b>Finished</b> Thank you. Assignments Completed.</p> <p>Finished</p> </div>	<p style="text-align: right;">C</p> <p>Finished!</p>

A

1st Shift							
1st Shift Production							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Week 1	7a/3:30p x	7a/3:30p x	7a/3:30p x	7a/3:30p x	7a/3:30p x		
	+	+	+	+	+		

Last Name	First Name	ID	Schedule Pattern	Effective Date
Benedict	Matthew A	000115	1st Shift	Sun Nov-26 00
Burke	Adele	103	1st Shift	Sun Nov-26 00
Byelich	Mary	241	1st Shift	Sun Nov-26 00
Furey	John	430	1st Shift	Sun Nov-26 00

The software now displays the schedule pattern and the employees assigned to the pattern.

## The Payroll Activity Screen

B

Payroll	Scheduling	H.R.
<b>Weekly&gt;Mon to Sun</b>	<b>This Week</b>	<b>Usage</b>
Employees 87	Begins Mon Nov-27 00	Active Employees 87
Previous Period	Ends Sun Dec-03 00	Hourly Status Types
Begins Mon Nov-20 00	Employees Scheduled 75	Full Time 85
Ends Sun Nov-26 00	Employees Scheduled Off 11	Part Time 2
Posted	Employees Without Schedules 5	Active Conditions
Issues 3, 2 critical	<b>Next Week</b>	Normal 82
Hours 3165:01	Begins Mon Dec-04 00	Probation 2
Dollars 39837.97	Ends Sun Dec-10 00	Reviewed 3
Status Please Repair!	Employees Scheduled 81	Training 0
Current Period	Employees Scheduled Off 7	
Begins Mon Nov-27 00	Employees Without Schedules 2	
Ends Sun Dec-03 00		
Issues 46, 19 critical		
Hours 2045:00		
Dollars 21650.97		
Status Please Repair!		

The Employee Status Screen presents the current and previous pay period *status* as well as scheduling and H.R. information.

C

Excel Print Preview

Close Payroll Sheet

Last Name	First Name	ID	Department	Condition
Fera Jr	Charles	000410	NTWARE	Missing Punches
Powers	Steven M	001290	DAYWH	Missing Punches
Byelich	Mary	241	SALESC	Unreviewed Absences

By selecting the Issues **Issues 3, 2 critical** you will be presented with the critical (**Bold Print**) and non-critical issues.

D

Payroll	Scheduling	H.R.
<b>Weekly&gt;Mon to Sun</b>	<b>This Week</b>	<b>Usage</b>
Employees 87	Begins Mon Nov-27 00	Active Employees 87
Previous Period	Ends Sun Dec-03 00	Hourly Status Types
Begins Mon Nov-20 00	Employees Scheduled 75	Full Time 85
Ends Sun Nov-26 00	Employees Scheduled Off 11	Part Time 2
Posted	Employees Without Schedules 5	Active Conditions
Issues 1, 0 critical	<b>Next Week</b>	Normal 82
Hours 3181:01	Begins Mon Dec-04 00	Probation 2
Dollars 40134.84	Ends Sun Dec-10 00	Reviewed 3
Status Sufficient to Proceed	Employees Scheduled 81	Training 0
Current Period	Employees Scheduled Off 7	
Begins Mon Nov-27 00	Employees Without Schedules 2	
Ends Sun Dec-03 00		
Issues 46, 19 critical		
Hours 2045:00		
Dollars 21650.97		
Status Please Repair!		

Once the critical issues are resolved the status will change to *Sufficient to Proceed* in yellow.

Payroll		Scheduling		H.R.	
<b>Weekly&gt;Mon to Sun</b>		<b>This Week</b>		<b>Usage</b>	
Employees	87	Begins	Mon Nov-27 00	Active Employees	87
<b>Previous Period</b>		Ends	Sun Dec-03 00	<b>Hourly Status Types</b>	
Begins	Mon Nov-20 00	Employees Scheduled	75	Full Time	85
Ends	Sun Nov-26 00	Employees Scheduled Off	11	Part Time	2
Posted		Employees Without Schedules	5	<b>Active Conditions</b>	
Issues	0, 0 critical	<b>Next Week</b>		Normal	82
Hours	3181:01	Begins	Mon Dec-04 00	Probation	2
Dollars	40134.84	Ends	Sun Dec-10 00	Reviewed	3
Status	Ready	Employees Scheduled	81	Training	0
<b>Current Period</b>		Employees Scheduled Off	7		
Begins	Mon Nov-27 00	Employees Without Schedules	2		
Ends	Sun Dec-03 00				
Issues	-6, 19 critical				
Hours	2045:00				
Dollars	21650.97				
Status	Please Repair!				

Once the non-critical issues are resolved, the status will change to *Ready* in green.