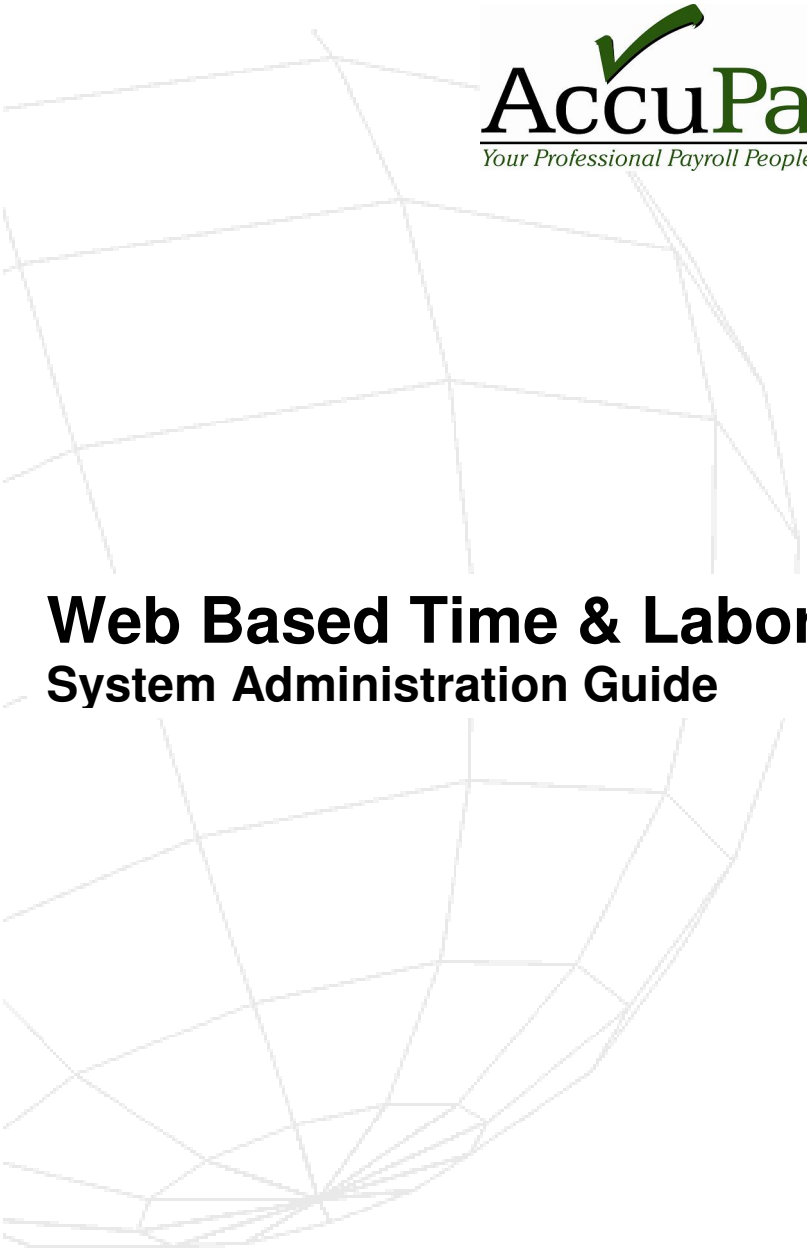

Web Based Time & Labor Management
System Administration Guide

Web Based Time & Labor Management System Administration Guide

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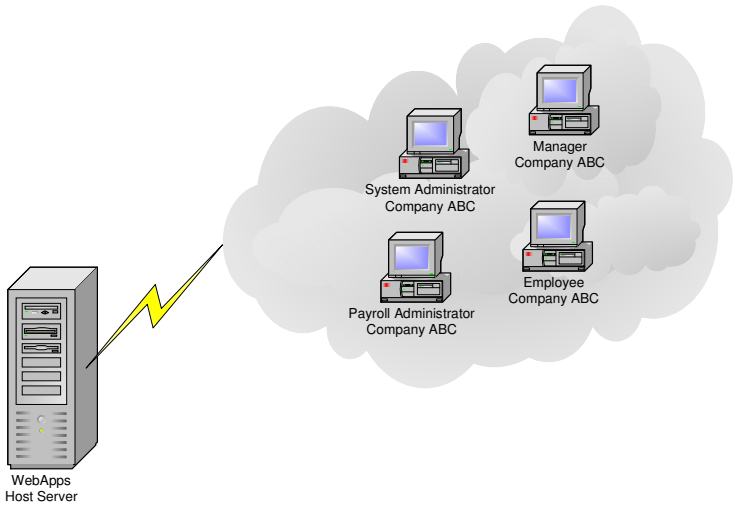
Introduction

This chapter provides introductory information about Web Based Time & Labor Management and this guide. It contains the following sections:

- About Web Based Time & Labor Management
- About this Guide

About Web Based Time & Labor Management

Web Based Time & Labor Management is a web-based time and attendance system used for a variety of labor tracking needs such as attendance management, project tracking, benefit entitlements, payroll preparation, and more. Requiring minimal configuration and maintenance, Web Based Time & Labor Management is a flexible solution that lets users log into their account from any location via the Internet, as shown in the illustration below.



Network Diagram

Web Based Time & Labor Management offers extensive access privilege configuration capabilities for total control over what users can see and do within the system. After minimal setup and configuration, users can use Web Based Time & Labor Management to record time entry information, submit timesheets, and request time off, while Managers can access user information and respond quickly to requests without the hassle of paperwork.

About this Guide

This guide describes tasks that are typically only performed by system administrators in Web Based Time & Labor Management. This guide contains the following chapters:

- **Introduction** - provides a brief system overview on Web Based Time & Labor Management and describes this guide.
- **Getting Started** - helps you get started with Web Based Time & Labor Management with log-in information and user interface fundamentals.
- **System Admin Tasks** - describes each system administration function within Web Based Time & Labor Management to help you set up and maintain your Web Based Time & Labor Management system.
- **FAQs** - provides answers to questions frequently asked by Web Based Time & Labor Management system administrators.

Separate guides have been created for manager and basic user users. The *Web Based Time & Labor Management User Guide for Managers* provides instructions on typical tasks performed by managers in Web Based Time & Labor Management, while the *Web Based Time & Labor Management User Guide for Employees* describes typical tasks performed by employees in Web Based Time & Labor Management.

Getting Started

This chapter provides information to help you get started with Web Based Time & Labor Management. It contains the following sections:

- Logging In
- Changing Your Password
- Common Icons and Screen Functions

Logging In

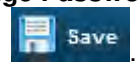
To log into Web Based Time & Labor Management, simply point your web browser to https://secure.entertimeonline.com/ta/[CompanyShortName].login. Replace the word **CompanyShortName** in the URL with your company's short name. For instance, if your company's name is **XYZ Business** and it's short name is **XYZ**; you would substitute **CompanyShortName** with **XYZ**. The URL would then read as follows: https://secure.entertimeonline.com/ta/XYZ.login. Then enter your username and password and click **Login**.

NOTE: If SS# is used as the username, all but the last 4 digits are 'masked'.

When logging in as an administrator, you will have more menu options than basic level employees, and managers. Menu options are determined by your security level and the software modules that are enabled on your Web Based Time & Labor Management system. Example: if your company is not using Web Based Time & Labor Management to track benefit accruals, the **Accruals** menu will not appear within your menus. An administrator's menu bar typically contains the following options:

- **My Account** - Use this menu to work on your own timesheets and Time Off requests.
- **My Employees -** used to manage users in the company, can also include **Accruals** which would be used to run accrual rules against timesheet data, depending on enabled functionality.
- **Manage Time** - Use this menu to manage all timesheets and Time Off requests. May also vary depending on your system access, as well as what modules have been enabled. You may see
  a. **Schedules** - used to create, modify and assign schedules to employees on a recurring basis or for one instance.
- **Manage Payroll** - Will allow you to process and export payroll.
  a. **Time Prep** - used to apply pay rules against timesheet data and export the data to your payroll provider for processing.
- **My Reports** - Use this menu to run reports.
- **Our Company –** allows for the uploading and referencing of **Company Documents.**
- **Company Settings -** Use this menu to change your employee's settings in Web Based Time & Labor Management.

Changing Your Password

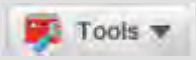
To change your password, select **My Account > My Settings > Change Password**. Use the fields on the **Change Password** screen to enter your old and new password, and then click 

.

Common Icons and Screen Functions

This section describes common icons and screen functions that can be found throughout the Web Based Time & Labor Management interface.

Icon	Function
	Provides calendar pop-up for you to select a date.
	Delete current selection.
	View/Edit current selection.
	Enter note.
	Punch in and punch out.

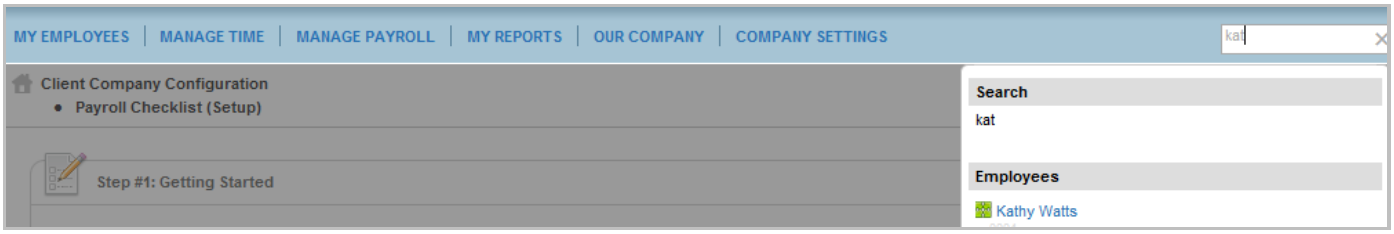
Icon	Function
	Print timesheet.
	View Group Permissions.
	View Approval History.
	Lookup options for current selection.
	View more detail.
	Lookup history.
	Lookup Employee
	View time off counts.
	Select, add, or approve.
	Reject.
	Add/change functions of a report.

Navigation Bars

Each page in Web Based Time & Labor Management contains a navigation bar that provides buttons for performing actions specific to that area of the software (see example below). Always use the navigation bar buttons along with Web Based Time & Labor Management menu options to navigate throughout the application, rather than the "Back" button offered in your web browser.

Search

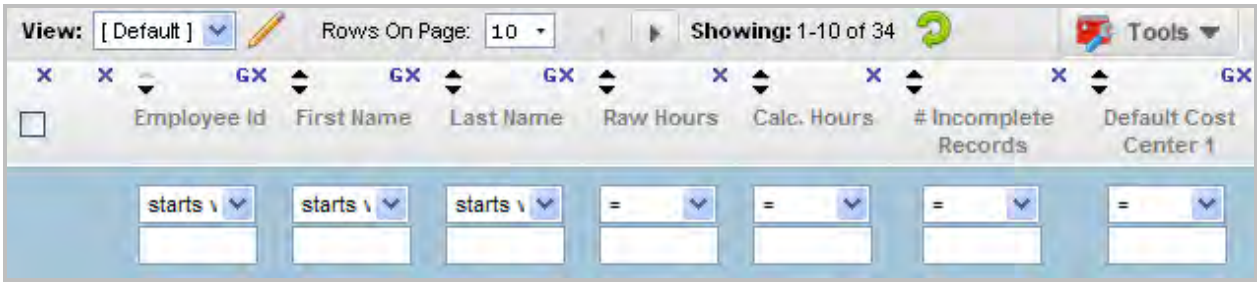
There is a Search Bar within the system that allows you to search for items throughout the system. This field will allow you to search for configuration pieces that are clickable, as well as specific employees (by name, Id, or badge). You will only be able to search for items based on your Security.



Filters

Many pages in Web Based Time & Labor Management offer filters for sorting data that appears on the page (see example on next page). These filters can be very helpful if you are looking for a specific record within a long list of data.

Example: you might be trying to find an employee account to edit amongst a long list of employees. You can find that employee account quickly by entering the first few letters of an employee's last name in the **Last Name** filter field, selecting the **starts with** option, and clicking **Run**. The page will refresh and display all users who fit the criteria entered. (Ex. If you enter in Smi, both Sally Smith and Jane Smiley will display).

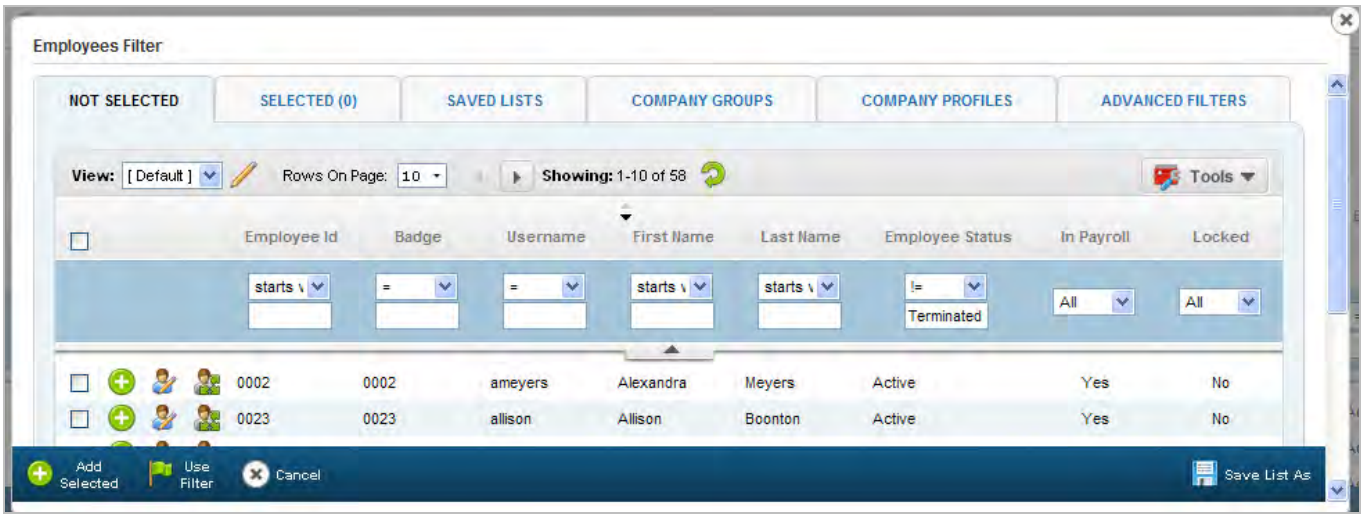


You will notice most column headings in the filter area contain **G** and **X** symbols. The **G** symbol lets you group the data on the page by that data type. The **X** symbol lets you remove that data column altogether from the results on the page.

In the drop down menu, you will also see a variety of other symbols that allow you to search more specifically for an item. The following table defines and provides an example for each symbol.

Symbol	Definition	Example
=	Entry is exactly this	The entry equals 03/30/06
! =	Entry is not this	The entry does not equal 03/30/06
starts with	Entry starts with	Entry starts with abc
not starts with	Entry does not start with	Entry does not start with abc
Like	Entry is like	Entry contains abc
not like	Entry is not like	Entry does not contain abc
<	Entries are less than	The entry is before 03/30/06
>	Entries are greater than	The entry is after 03/30/06
<=	Entries are not less than	The entry is before or on 03/30/06
>=	Entries are not greater than	The entry is on or after 03/30/06
is null	Entries that are blank	The entry is blank
is not null	Entries that are not blank	The entry has been filled in
In	Entries that include	The entry includes 03/30/06
not in	Entries that do not include	The entry does not include 03/30/06

The employee filter icon will allow you to filter reports by choosing specific employees or groups of employees. Once you click on the icon, a screen appears (as shown below) with six tabs at the top of the screen:



- **Not Selected** - shows all available employees. You can click on the boxes to individually select employees to include in the report. Click

- **Selected** - shows selected employees.
- **Saved Lists** - indicates previously saved lists. You can create new lists by clicking on the 'Save List As' button.
- **Company Groups** - allows you to filter report by company groups.
- **Company Profiles** - allows you to filter report by company profiles.
- **Advanced Filters** - allows you to create a custom filter based on the settings that you choose.

System Admin Tasks

This chapter provides comprehensive training on Web Based Time & Labor Management functions specific to the system administrator role. It contains the following sections:

- The Company Information Screen
- The Company Configuration Screen
- Creating Time Off Definitions
- Company Global Policies
- Setting Up System Notifications
- Creating List Definitions
- System Events
- Changing the Interface Look and Feel
- Setting Up Profiles
- Rates
- User Accounts
- Schedules
- Accruals
- Reports

Global Setup

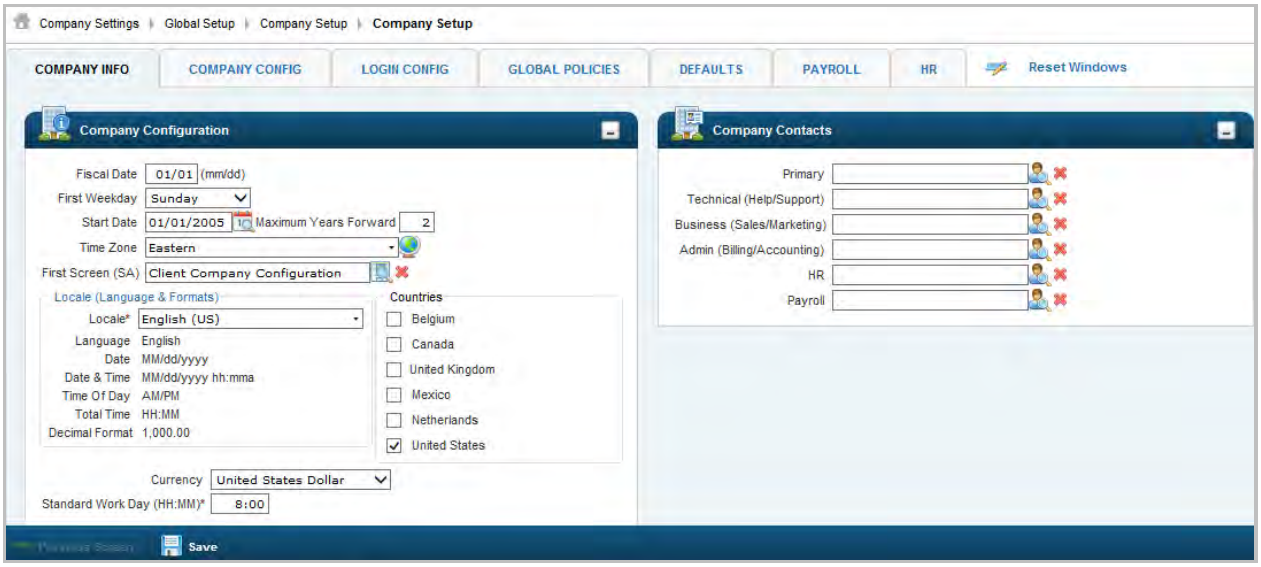
The Company Set-up Screen

The **Company Information** screen contains your company's address and contact information. If you need to modify these settings, use the information in this section as a guideline.

The **Company Configuration** screen contains system-wide settings associated with your Web Based Time & Labor Management system. If you need to modify these settings, use the information in this section as a guideline.

1. Go to **Company Settings > Global Setup > Company Set-up**. You will be able to tab through the settings, modify as desired and click the

button. The list below provides definitions for each field/setting.



2. **Company Configuration**
   - **Fiscal Date (mm/dd) -** fiscal date used by your company.
   - **First Week Day -** day of the week used by your company as the start of the business week
   - **Start Date -** start date from which your Web Based Time & Labor Management account functionality begins
   - **Time Zone -** time zone to be used when a new user is added and no time zone is specified in their user file
   - **First Screen –** the defaulted first screen when logging in as the System Administrator.
   - **Locale (Language & Formats) –** controls the format in which the Date, Date & Time, Time of Day, and Total Time are displayed within the system. Additionally, the text can be set to display in **English** or **Spanish.**
   - **Country –** the defaulted country for the company.
   - **Currency –** controls the default currency for the company and the way money displays within the system.
   - **Standard Work Day (HH.00) -** number of hours that is typically worked on a given day.

3. **Contacts (Optional)**
   - **Primary -** primary contact person for your company.
   - **Technical (Help/Support)** - your company's technical support person.
   - **Business (Sales/Marketing)** - the person responsible for your company's Sales and Marketing.
   - **Admin (Billing/Accounting) -** person responsible for your company's Billing and Accounting.

4. **Company Address**
   - **Company Name -** name of your company, as you want it to appear within the Web Based Time & Labor Management application.
   - **Company ID -** an abbreviation for your company name, typically consisting of 2-3 letters, used to identify your company at the initial login screen. This field cannot be modified.
   - **Tax ID -** your company's tax ID. This information is used for payment tracking. Example: if an adjustment is required to your account, your tax ID is required for us to issue payment.
   - **Street, City, State, and Zip -** your company's address.

The Company Configuration Screen

The **Company Configuration** screen contains system-wide settings associated with your Web Based Time & Labor Management system. If you need to modify these settings, use the information in this section as a guideline.

Click on the **Company Config tab**. Modify the settings as desired and click the

button. The following outline provides definitions for each field/setting.

Auto Groups

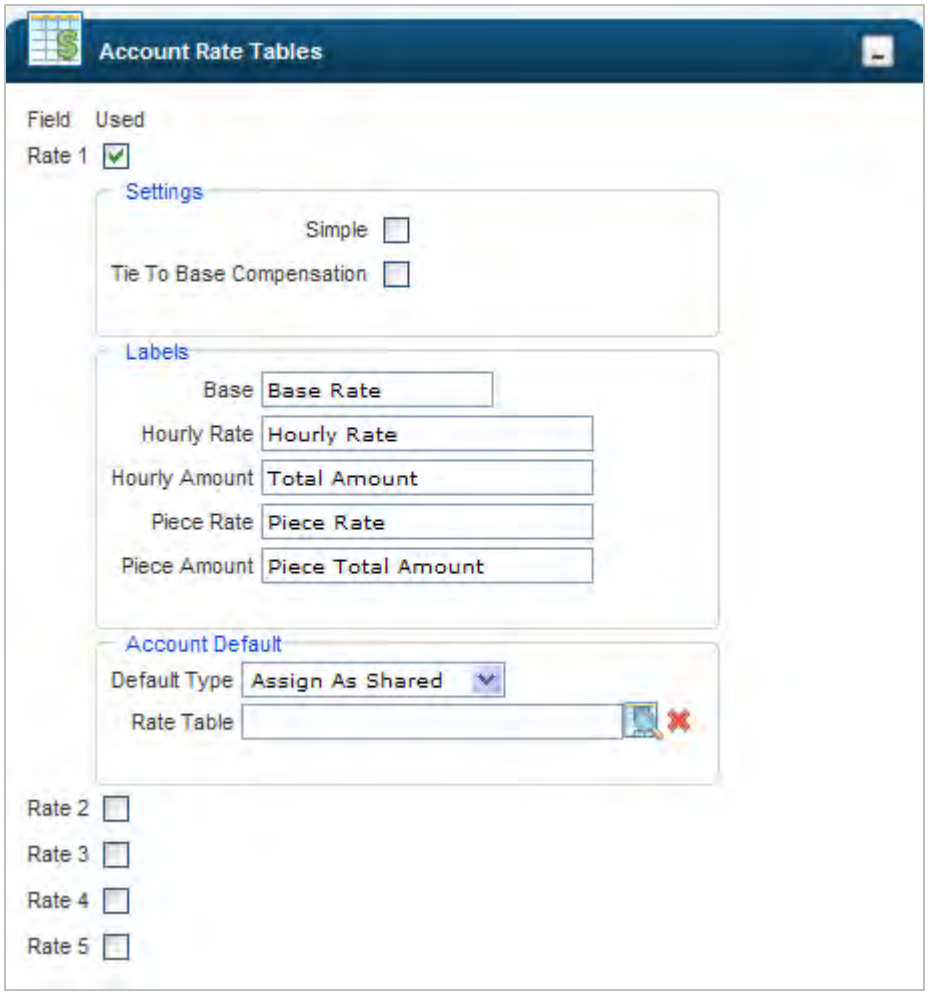
1. When enabled (check marked), groups are automatically created based on these fields. The user is automatically moved in and out of said groups as the values of these fields are changed in their user file.

Account Extra Fields

1. Extra user-definable fields for recording additional user information. Example: a company that requires users to wear uniforms might create a field called "Uniform Size". Fields created and enabled here will appear in each user account, where you can record the information.
2. **Used -** checkboxes to enable/disable any user-defined fields configured in this area for sorting and running reports.
3. **Label -** field to enter the name of the field you need added to the user account (maximum of 30 characters).

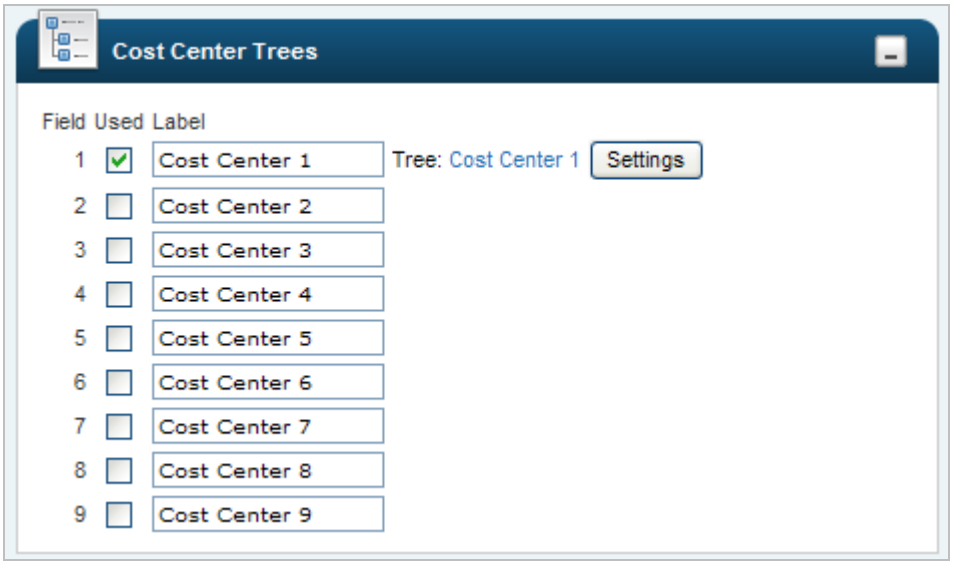
Lookup List To Use - drop down arrow to choose a lookup list (a list of acceptable choices for this field). The Lookup List has to be created under **Our Company > Global Setup > Global List Definitions > Lookup List Definitions** first. If no Lookup List is chosen, then this field is a 'free form entry' and there is no control over what a person types in this field.

Account Rate Tables



1. Extra user-definable fields for recording **Rate Table** information. Example: a company that pays a different hourly rate based on what cost center the user works in might create a rate table called “Payable”. Rate tables defined here will appear in each user account.
2. **Used -** checkboxes to enable/disable any user-defined fields configured in this area for sorting and running reports.
3. **Settings -**
   - **Simple -** will allow the rate to be entered right on the employee’s information profile without using rate tables. This functionality only allows for one base rate per employee.
   - **Tie To Base Compensation** - allows the tying of the Base Compensation Amount information entered on the employee’s information profile to populate within the employee’s rate table.
4. **Labels -** field to enter the name of the rate table you need added to the user account (maximum of 30 characters).
   - **Base -** when enabled, this field can be pulled into a report to show the employee's base rate, without multipliers attached.
   - **Hourly Rate -** when enabled, this field can be pulling into a report to show the employee's base rate multiplied by the pay category multiplier.
   - **Hourly Amount-** employee base rate multiplied by hours worked.
   - **Piece Rate -** rate per piece.
   - **Piece Amount -** employee piece rate multiplied by pieces.
5. **Account Default**
   - **Default Type -** specify whether the Rate Table is personal to the employee, or can be shared
   - **Rate Table -** a default rate table assigned to an employee once they are created in the system.

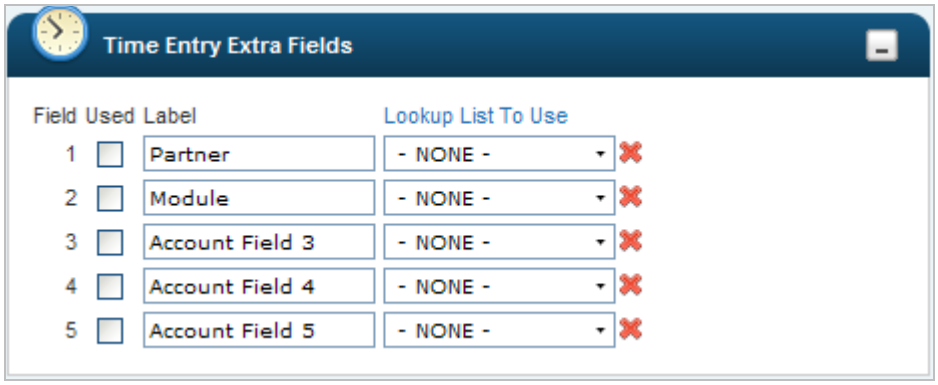
Cost Center Trees



1. Web Based Time & Labor Management provides you with the ability to utilize up to 5 Cost Center Trees. Cost Centers are categories of different labor breakdowns used within your organization to allocate and track time. Example: you might have Cost Centers for different job types, office locations, and departments. In Web Based Time & Labor Management you can create any number of Cost Centers (parent) and sub divisions (children) and organize them according to your company's policies.
2. **Custom Fields -** extra user-definable fields for recording additional Cost Center information. Example: a company that has geographic locations associated with each Cost Center might create a field called "Location".

- **Used** - checkboxes to enable/disable any user-defined fields configured in this area for sorting and running reports.
- **Label -** user defined label for the cost center tree (maximum of 30 characters).
- **Tree -** links to the specific cost centers within the cost center tree.
- **Settings -** allows you to define settings per cost center (i.e. limit the number of levels per cost center).

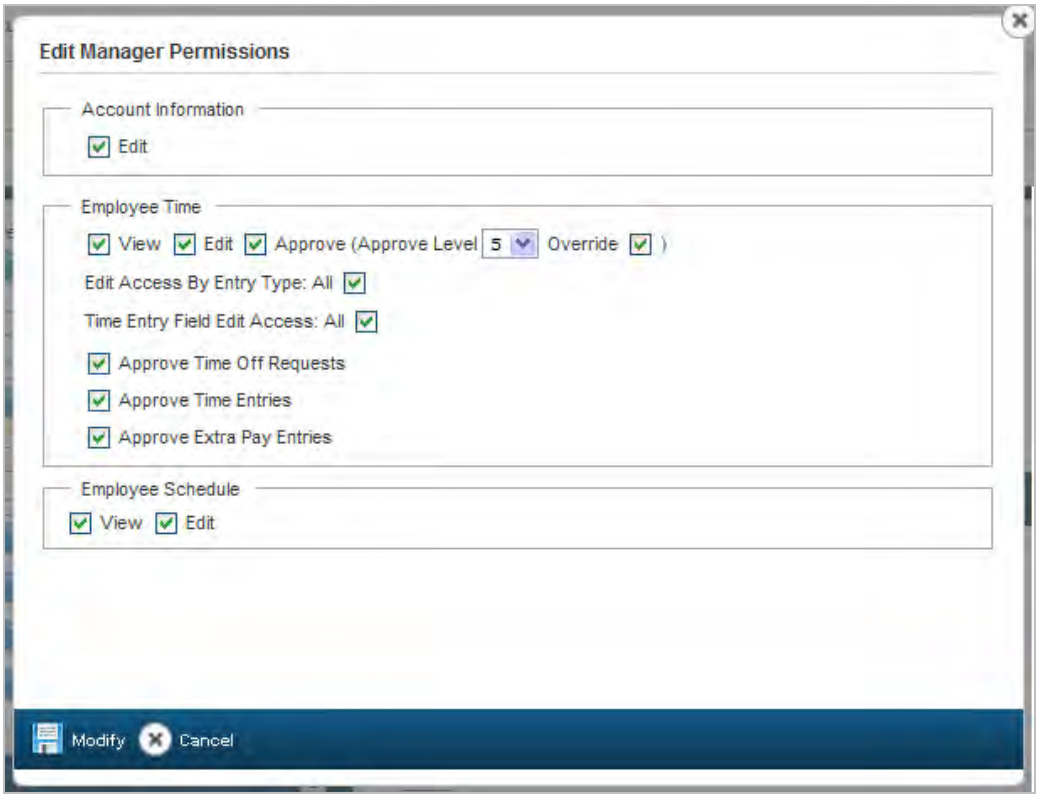
Time Entry Extra Fields



1. **Time Entry Extra Fields -** are user-definable fields for recording additional user time entry information. Example: a company that requires users to track their daily work by Projects might also need to know what type of work was done on said Project (follow up with client, revised user manual, etc.) Fields created and enabled here will appear in each user timesheet, where you can record the information.
2. **Used** - checkboxes to enable/disable any user-defined fields configured in this area for sorting and running reports.
3. **Label -** field to enter the name of the field you need added to the user account (maximum of 30 characters).
4. **Lookup List To Use -** drop down arrow to choose a lookup list (a list of acceptable choices for this field).

Manager Information

1. **Manager Information** allows you to determine the approval workflow within your company. There are up to 5 levels of approval available. Fields created and enabled here will appear in each employee record, where you can then assign the appropriate approver to that employee.
2. **Used** - checkboxes to enable/disable any user-defined fields configured in this area for sorting and running reports.
3. **Label** - field to enter the common name given to an approver/s within your company.



4. **Permission** - field to determine the functionality the approver will have access to, buy clicking on the button.
5. **Default Manager -** allows you to define default managers at each level to be assigned to an employee once they are created in the system. I.E. Manager or Time Off Requests Handler.

Click on the **Login Config tab**. Modify the settings as desired and click the Save button. The following outline provides definitions for each field/setting.

Mobile Application

Web Based Time & Labor Management offers a Mobile App that includes company, manager, and employee level functions. The Mobile App can be downloaded from the App Marketplace on your iPhone or Droid.

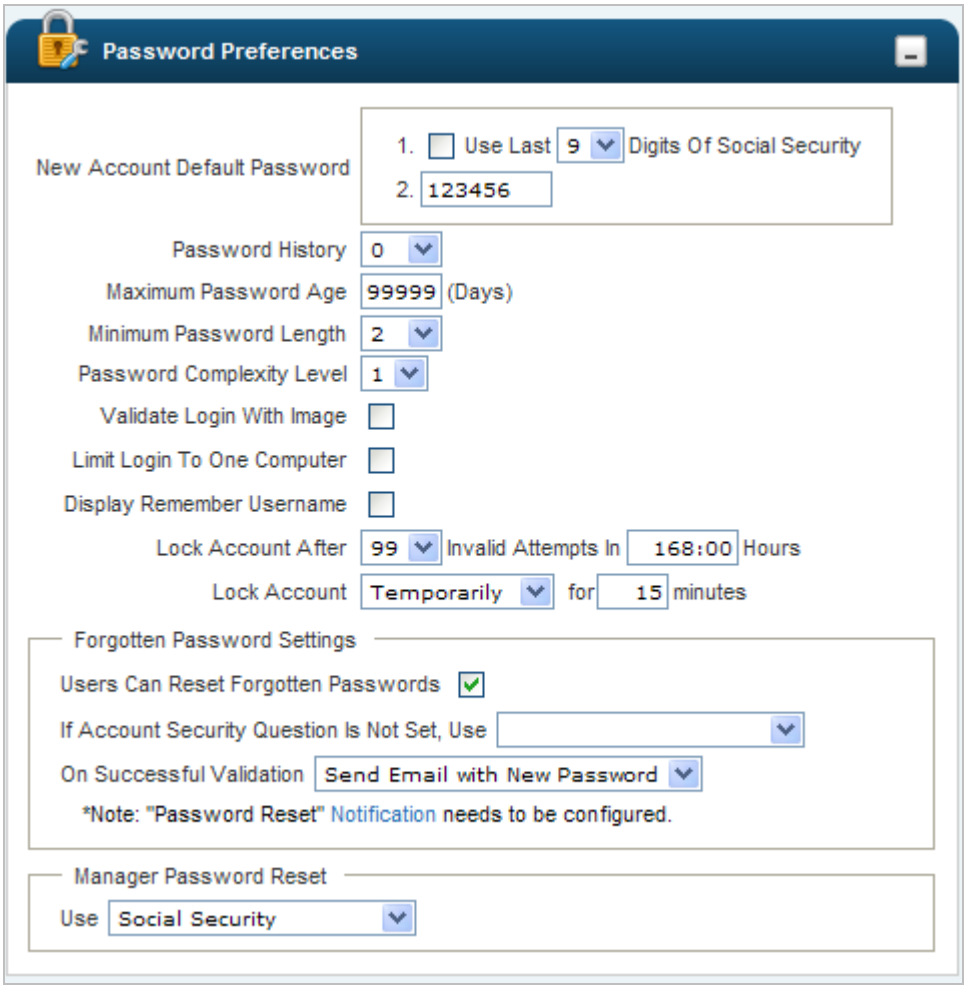
Company Level: Ability to customize preferences, such as remembering an employee's login information and also enabling or disabling the use of the application for each company. The login screen can also be customized to fit each company's needs. GPS coordinates can also be captured with punches, and visible within the All Punches Report in the "Location" column.
Manger Level: Can view Employee Lists which will display employee's Timesheets, Schedules, and more, and can also Approve Time Off Requests.
Employee Level: Ability to view personal Timesheet, Time Off Balances, Request Time Off, view personal Time Off Calendar, as well as the Dot Board Report.

Mobile Preferences are configurable under **Company Settings > Global Setup > Company Setup**. Click on the **Login Config Tab** to see the **Mobile** widget (if the widget is not listed in your company, click on the icon to drag the window into your view).

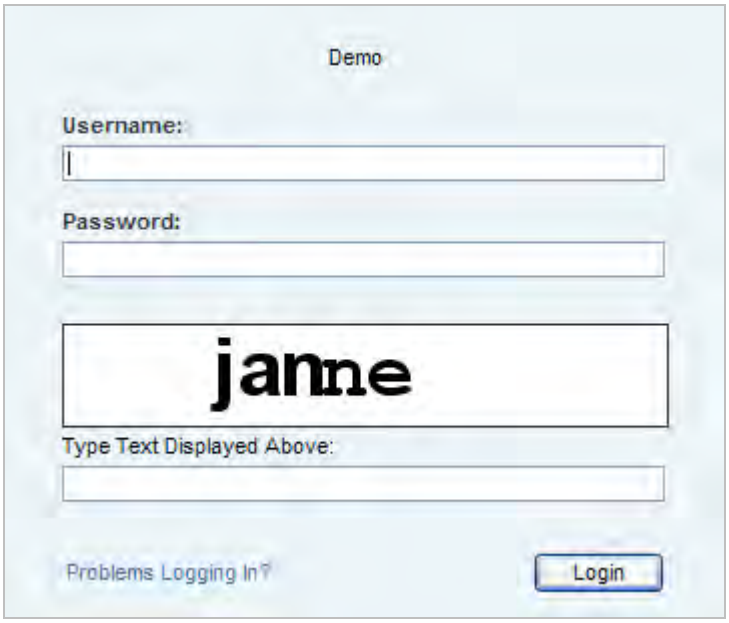
1. **Enable –** enables mobile functionality for this company.
2. **Allow Mobile Login –** when disabled, the mobile app will act just like a hardware device, allowing just punch in/out and job cost functionality. When enabled, a user has access to run reports, request time off, etc. All is dependent on the user's access within Groups and Security Profile.
3. **Allow Mobile Clock –** restricts a user from being able to punch on the mobile device.
4. **Store Token:**
   - **Do Not Store** – username and password must be entered each time mobile app is accessed. This means the users will be required to enter their username and password each time they open the app and attempt to login. Additionally, they will need to enter their password each time they enter secure areas of the mobile application.
   - **Full Token** – username and password are stored and do NOT need to be entered each time mobile app is accessed. However, a user will still need to enter their password to access more secure areas of the mobile application.
   - **Username Only –** username is stored, but password must be entered each time mobile app is accessed.
   - **# Days –** appears when Full Token or Username Only are selected. When # is left blank, system assumes to store indefinitely.
5. **Allow Change User –** would allow multiple users to punch in using the same mobile device.
6. **Allow Change Company –** would allow users to log in / out of multiple companies from mobile device.
7. **Offline Punches –** allows punches to be stored if there is no Wi-Fi connection on the phone. Punches will be stored and uploaded once connectivity is restored.
8. **Check Distance –** allows you to limit a user's ability to login and punch from outside a specific location's coordinates. By default, coordinates are always captured and stored on each punch as long as the smart phone has GPS capabilities enabled. If GPS capability is disabled on the smart phone, a user will not be able to login or punch.

NOTE: These settings are also available within the Security Profile, so different functions can be enabled or disabled based on the user's role.

Password Preferences



1. **New Account Default Password -** the temporary default password for new user/employee accounts. This value should be between 5 and 10 characters in length.
2. **Password History -** the number of most recently used passwords the system will remember and not allow you to reuse.
3. **Maximum Password Age (Days) -** the number of days this password will be active before the system prompts the user to enter a new password. (If '0' is entered, then the password will be active for an infinite amount of time.)
4. **Minimum Password Length -** least number of characters needed for a valid password.
5. **Password Complexity Level** - allows you to determine how complex a password can be. There are 4 different characters that can be present in a password: upper case letters, lower case letters, numbers and symbols. Each level requires 1 or more differing characters. Ex:
   Level 1: welcome
   Level 2: Welcome
   Level 3: Welcome1
   Level 4: Welcome1!
   If the complexity is set to Level 1, the user can always make their password more complex, but it is not required. However, if the complexity level is set above Level 1, they must use the required number of varied characters.
6. **Validate Login with Image** - this setting allows you to force the user to verify their login by typing in letters visible in an image, as shown in the image below.

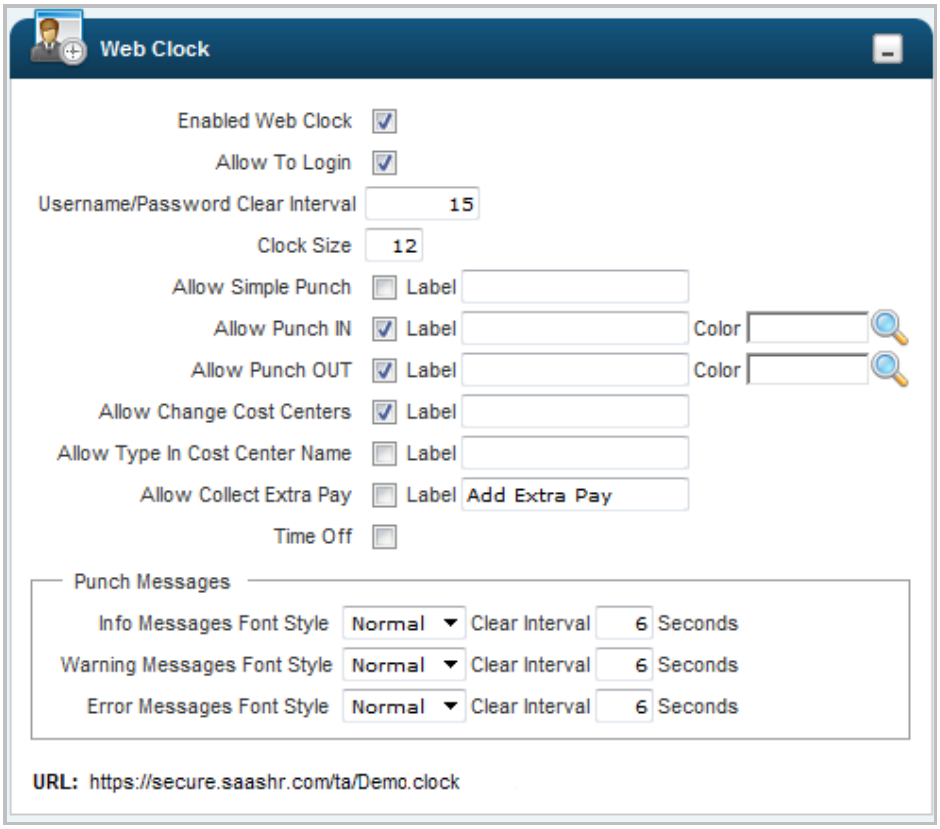


7. **Display Remember Username** - will display a check box on the login screen, allowing the system to remember the username entered for the next login.
8. **Lock Account After 'X' Invalid Attempts -** number of invalid attempts before the system locks the user account and prevents any more login attempts.
9. **Lock Account -** allows you to define how long you would like the user's account for (if they have reached a certain number of invalid login attempts. **Permanently** will lock the user's account until a manager or administrator unlocks them. Temporarily allows you to define the number of minutes the user's account should be locked for.
10. **Forgotten Password Settings**
    - **User Can Reset Forgotten Passwords -** if checked, users can reset their own passwords
    - **If Account Security Question Is Not Set, Use -** system will prompt the user for their Social Security number to validate who they are.
    - **On Successful Validation -** allows you to send the employee an email on successful validation (e-mail notification must be configured under **Our Company > Global Setup > Notifications**).
11. **Manager Password Reset**
    - **Use -** allows the manager to use their SS number, last four digits of their SS number, or a user defined password to have the system generate them a new password.

Login/Logout Preferences

1. **URL To Show On Logout -** This setting determines the web page address to be displayed when a user logs out. This is not a required field. It can be left blank, in which case the generic user login screen would be displayed. If you would like your company specific login screen to be displayed at logout, type the URL in this field. Example: your company's web address.
2. **Remote Login**
    - **Session Validation URL –** When using Single Sign-On, this is the URL that would allow our system to connect back to a 3rd party system to validate the session and let the user through to our system.

Web Clock



1. **Enable Web Clock** - allow clocking in/out from provided URL
2. **Allow To Login** - gives the employees the ability to log in to the system
3. **Username/Password Clear Interval** -
4. **Clock Size** -
5. **Allow Simple Punch** - Uses one button for clocking in, out, and changing cost centers
6. **Allow Punch IN** - Shows a clock-in button, allowing employees to clock in directly from the log-in page
7. **Allow Punch OUT** - Shows a clock-out button, allowing employees to clock out directly from the log-in page
8. **Allow Change Cost Centers** - Shows a change cost center button, allowing employees to change cost centers directly from the log-in page
9. **Allow Type In Cost Center Name** - Allows employees to type in their cost center, instead of selecting it
10. **Allow Collect Extra Pay** – Allows employees to enter an extra pay amount when clocking in or out
11. **Time Off** – Allows employees to designate time off when clocking in or out
12. **Punch Messages** – Sets the message font style and length it displays when an employee's punch triggers either an information, warning, or error message.
13. **Automatic Cost Center Allocation based on URL** – logic can be added to the **.clock**'s URL screen to specify which cost center the employee is punching in to, without them needing to specify.
    https://secure.entertimeonline.com/ta/<COMPANYSHORTNAME>.clock?@DefaultCost1-5=<ExternalID>
    - **<COMPANYSHORTNAME>** - replace with the shortname of the company.
    - **DefaultCost1-5=<ExternalID> -** represents the Cost Center Tree (1 through 5) and External ID of the specific Cost Center on that tree. Multiple levels of job costing can also be handled through this new method, you will include &@ symbols between each tree. For example: …**clock?@DefaultCost1=123&@DefaultCost2=456&@DefaultCost3=**789, etc.

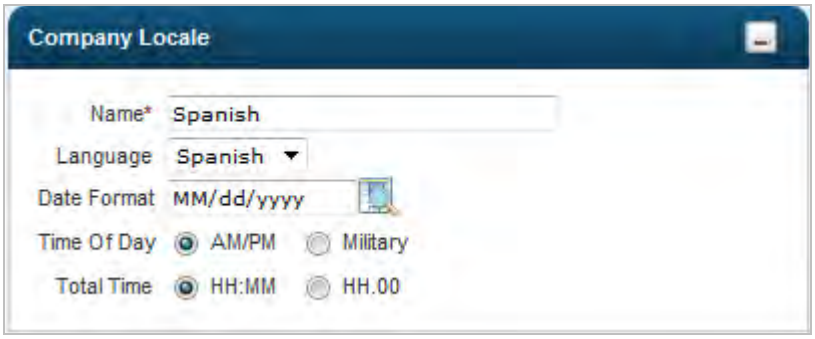
Locales

***Currently, the system can display in either English (US), French, French Canadian, or Spanish.**

To create the Locale (Language & Formats):

1. Select **Company Settings > Global Setup > Locales** and click

.



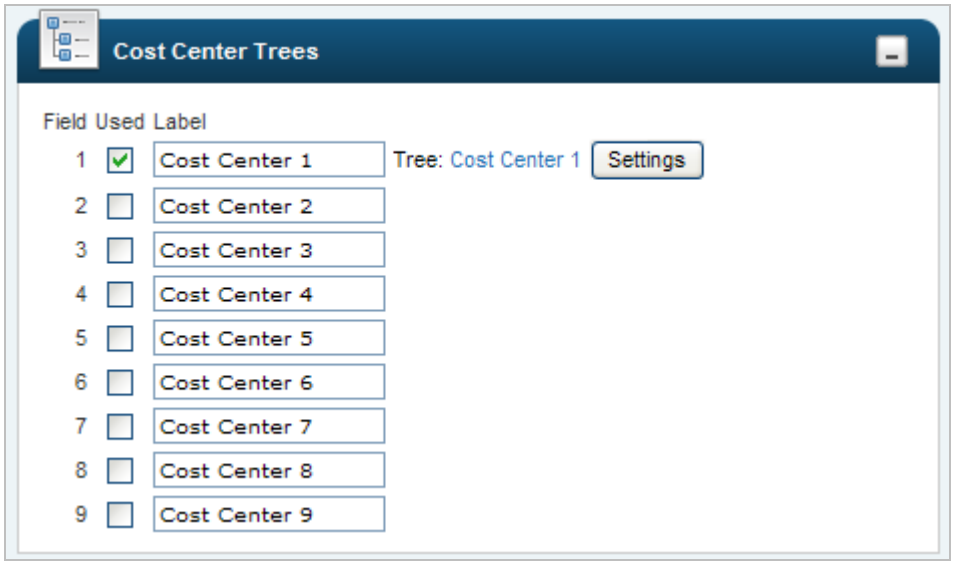
- **Name –** the display name for the locale being created.
- **Language –** either English (US) or Spanish.
- **Date Format –** format in which Date fields should appear in Web Based Time & Labor Management. Example: entering mm/dd/yyyy indicates that you want all Date fields to appear in this format throughout the user interface.
- **Time of Day –** format in which Time of Day fields should appear in Web Based Time & Labor Management. Example: choosing Military (24 hour clock) indicates that you want all Time of Day fields to appear in this format throughout the user interface.
- **Total Time –** format in which Total Time fields should appear in Web Based Time & Labor Management. Example: choosing HH:00 (hours.decimal) indicates that you want all Total Time fields to appear in this format throughout the user interface.

NOTE: The Locale can be set at the Company **and** Employee level**.** So, a company's defaulted locale may be English (US), but Spanish speaking employees can have their view in Spanish. Keep in mind the view set for the Company will apply when logging in as the System Administrator.

Creating Cost Centers

To create a Cost Center:

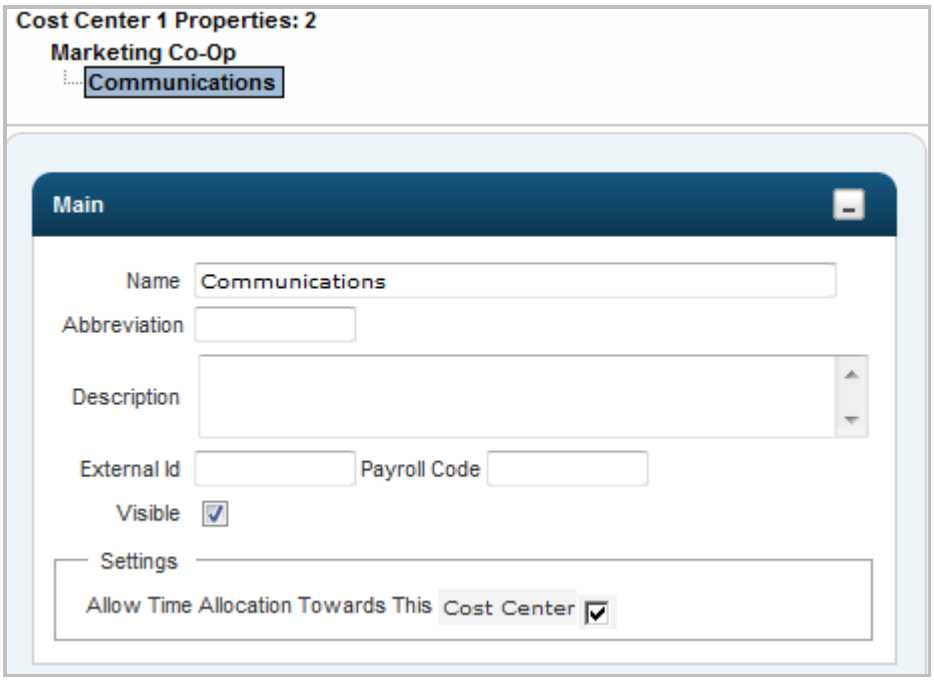
1. Select **Company Settings > Global Setup > Company Set-up**. In the **Cost Center Trees** window you will see this image.



2. Select the **Used** check box to enable a **Cost Center Tree** and click

.
3. Then, select the blue hyperlink next to **Tree** to edit the **Cost Center Tree**. On the right side of your screen, you will see the cost centers already created, in a tree structure as shown below.
4. Click the ⊞ to pull down the list of cost centers beneath their parent. For example, under Executive Offices there are 4 children.

5. By clicking on one of these cost centers, you have the option to view the properties assigned, as shown below.



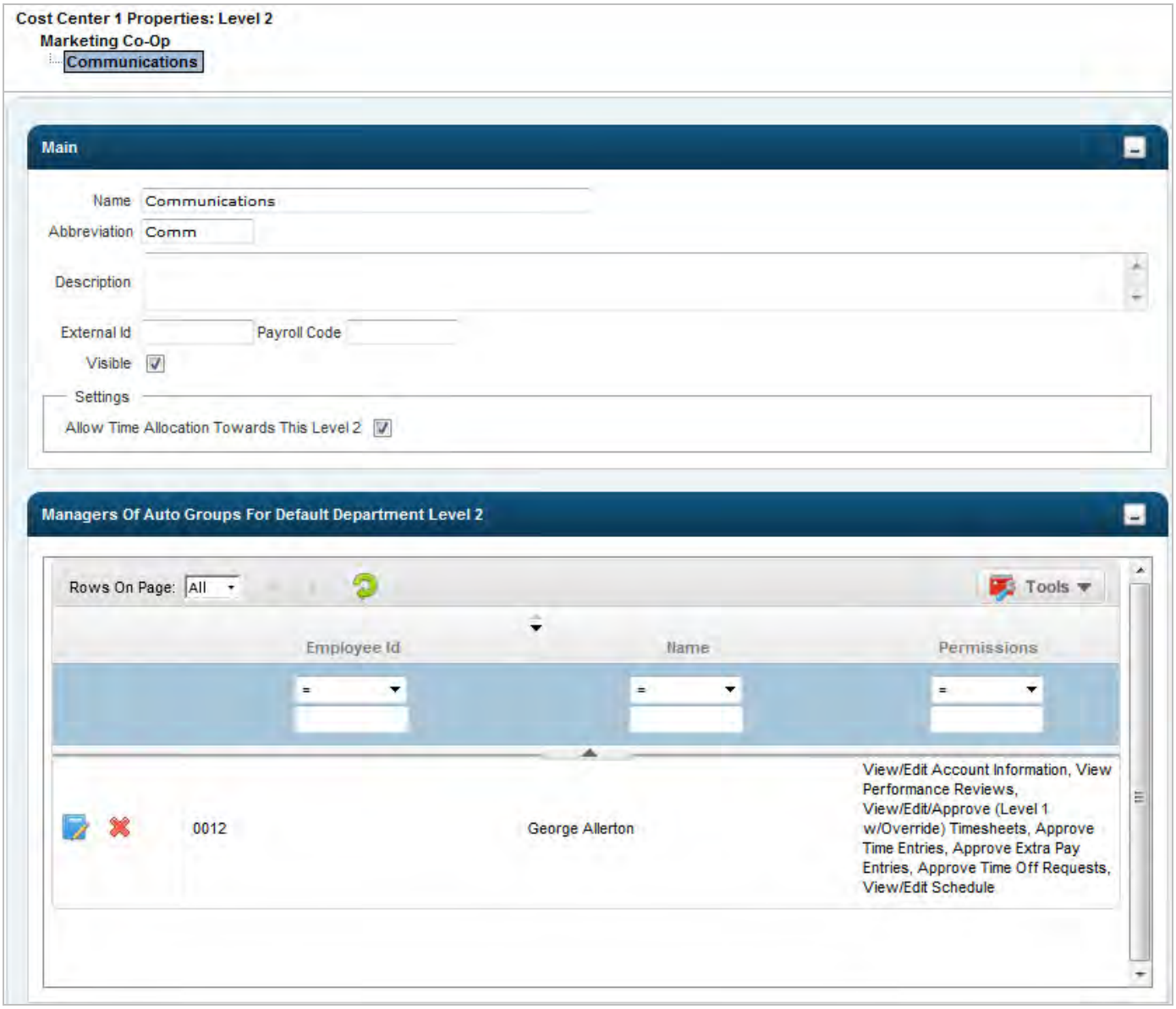
6. Enter the properties of the Cost Center and click the

button. The following table provides definitions for each field in the Cost Centers Properties screen.
   - **Name -** name for the Cost Center.
   - **Abbreviation -** an abbreviation for the Cost Center, which allows for up to 12 characters. This is for display purposes.
   - **Description -** a brief description about the Cost Center.
   - **External ID -** this field is a unique link to an external system. If you are using a hardware device and job costing, a numeric code must be entered in this field.
   - **Payroll Code -** specify a payroll code that will be used in the payroll export file.
   - **Settings -** checkbox to allow time to towards this Cost Center

- **Extra Fields -** if cost center extra fields for recording additional Cost Center information have been created and enabled in Company Configuration, they will display here. (Example: a company that has geographic locations associated with each Cost Center might create a field called "Location".)

7. To add a new Cost Center at the top-most level (parent), click the Add New button.
8. To add a sub Cost Center (child) below an existing Cost Center, select the existing Cost Center you want to work with. Then, click the Add New (Child: 1) button.
9. Click the Save button to save the Cost Center.

10. If you have **Auto Groups** based on Cost Centers enabled within **Company Configuration**, you will also be able to add / edit / remove manager permissions from within your cost center tree as can within the Groups screen.



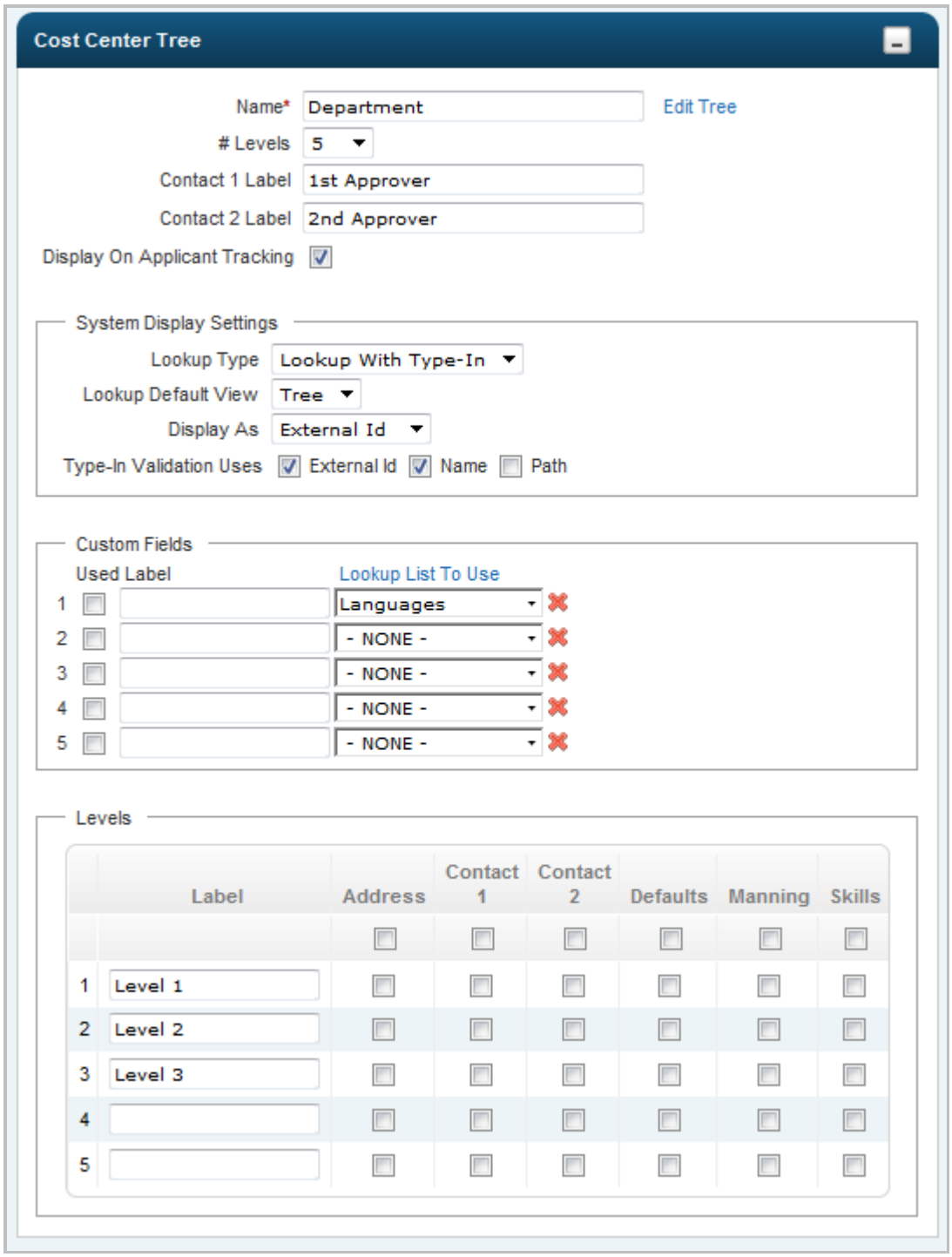
Tips on Managing Cost Centers

When you need to modify or delete a **Cost Center** follow these next steps.
Go to **Company Settings > Global Setup > Cost Centers** and use the following guidelines:

- To **modify a Cost Center**, select the button next to the Cost Center in which you want to modify.
- Make your changes and select the

button.
- To **delete a Cost Center**, select the button next to the Cost Center you want to delete. If this Cost Center has not been assigned on any timesheets it will delete, and you will receive an error message alerting you to this fact. You will not be able to delete a cost center if it is the root cost center.
- To **search for a Cost Center**, use the filters at the top of the page, and then click on the **Run** button.

By clicking on the **Settings** button you will be taken to the following **Cost Center Tree** screen:



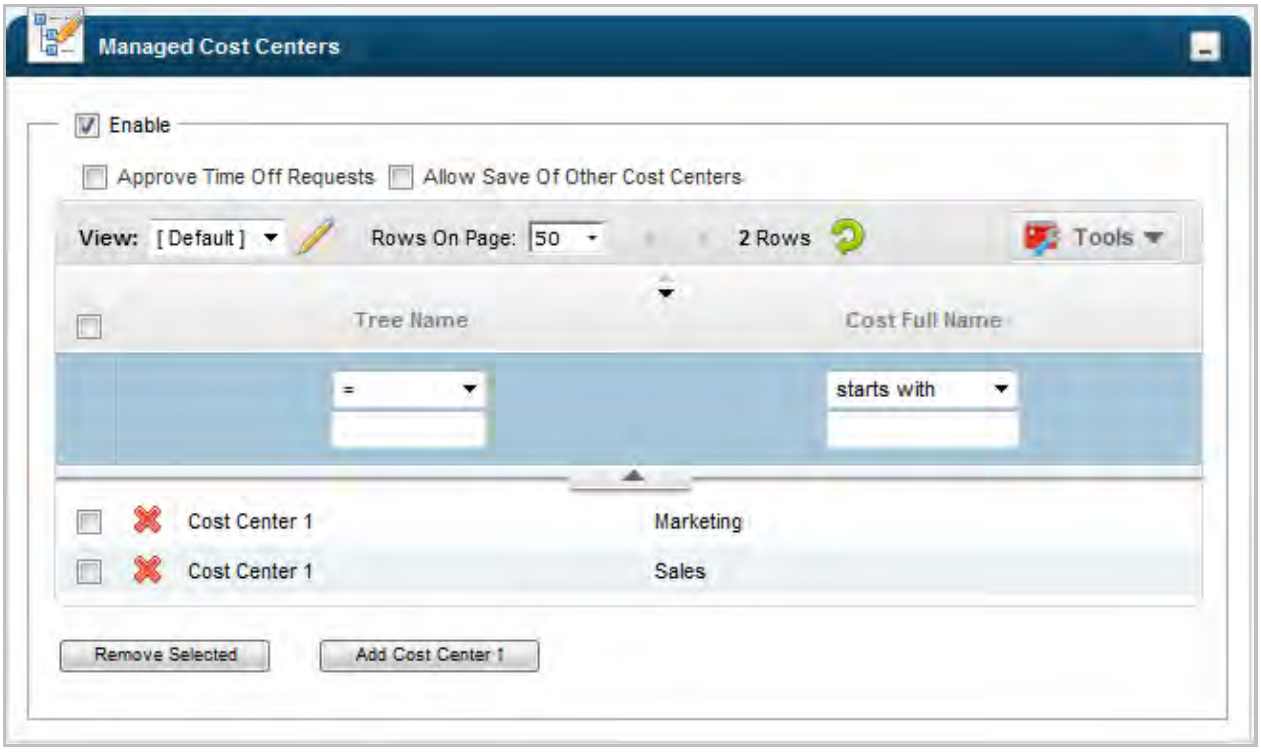
- **# Levels -** allows you to specify a maximum number of levels per cost center tree.
- **Contact 1 and Contact 2 Label** - allows you to define a label for contacts that are associated with this cost center, for example, that Cost Center's manager. At this time, this information is just for reporting purposes.
- **System Display Settings –** determines how the Cost Centers will display throughout the system.
  a. **Lookup Type** – allows the option for look-up, type-in, or a combination.
  b. **Lookup Default View** – specifies how the lookup screen should display, either tree or list view on the employee's timesheet
  c. **Display As** – determines what format the Cost Centers should display in (abbreviated, external ID, name, etc.)

d. **Type-in Validation Uses** – if utilizing the type-in option, this specifies what the system will use to match those fields

- **Custom Fields -** allow you to enable custom fields which are tied to cost centers and reportable upon.
- **Levels** - rather than calling the levels **Level 1** and **Level 2** within reports, you can now customize this label.
  a. **Checkboxes** - allow you to enable additional windows and settings within the Edit Cost Center window, including:
  b. **Address** - allows you to enter in address information for that cost center. For example, if your cost center tree consists of Locations, you now would have fields available to enter in Address information for that location.
  c. **Contact 1 and Contact 2** - allows you to enable / disable Contacts 1 and 2 at multiple levels.
  d. **Defaults** - allows you to specify default Profiles that can be assigned to an employee if they are assigned to this cost center as a default.
  e. **Manning -** with future enhancements to the system, you would be able to specify the number of employees needed to work in a specific cost center. Then, you would be able to report on this field to see how many employees were manned for this cost center versus how many employees worked.
  f. **Skills –** with future enhancements to the system, you would be able to specify skills associated with the cost center.

Utilizing Managed Cost Centers

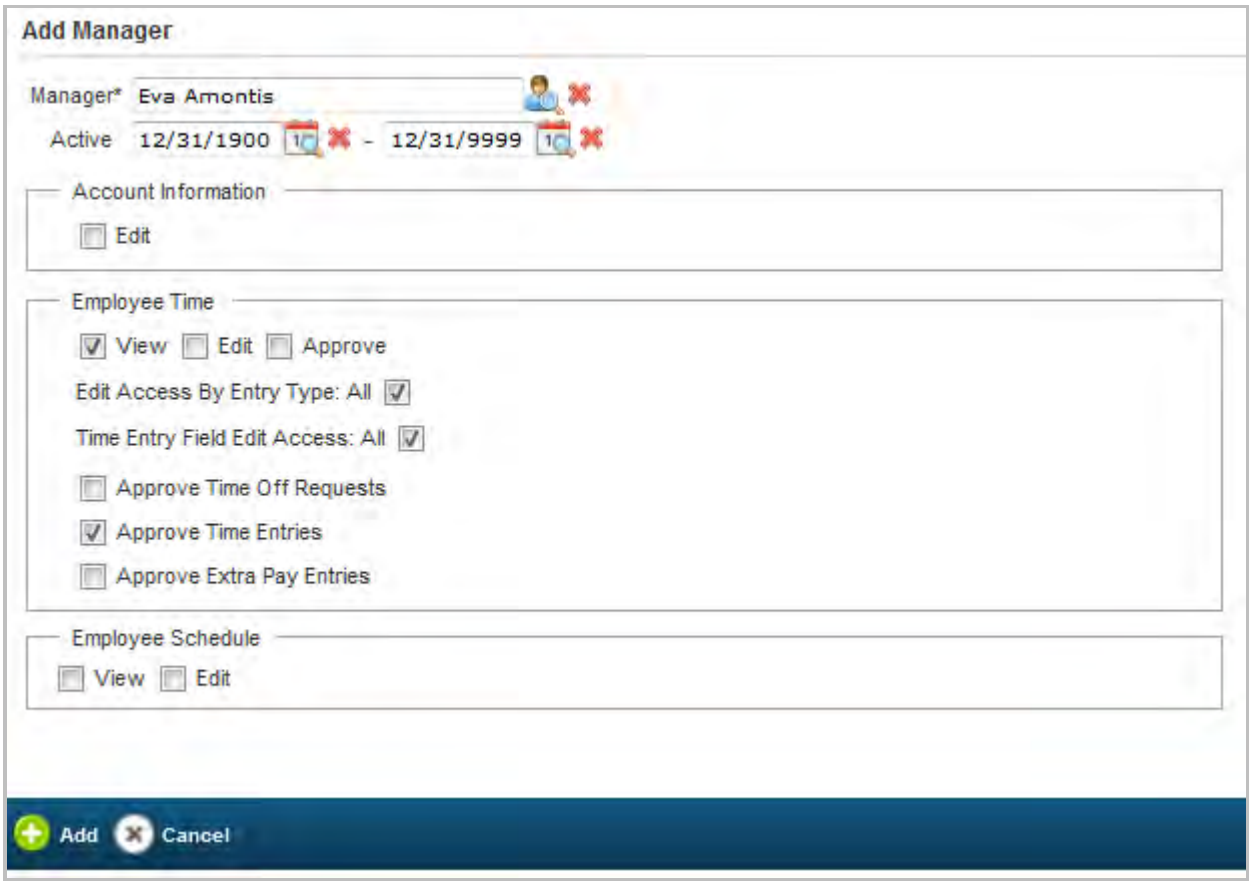
Managed Cost Centers can be used when managers should have access to employees based on the cost center(s) that an employee works in. So, Mr. Manager may see John Smith's time when he works in Department A because Mr. Manager oversees Department A, even though John Smith's default department is really Department C. So aside from the time John Smith works in Department A, Mr. Manager isn't responsible for his time entries or timesheet.



To enable and utilize Managed Cost Centers:

1. Within an employee's Information Profile, click on the button, and within the **Available Windows** column, drag the **Managed Cost Centers** option to where you'd like it to display on the profile, and save.
2. You can then go into the manager's Information Profiles and click on the checkbox to **enable Managed Cost Centers** for them, and click on the Add Cost Center 1 button to add the appropriate Cost Center(s) that the manager should have access to.

3. You'll also be able to determine if the managers should have access to also approve time off requests, and allow the saving of other cost centers when the manager is in the employee's timesheet.



4. Then, within the **Company Information** screen in your **Admin Account**, under

you'll need to make sure Approve Individual Time Entries is checked off.
5. Finally, under **Company Settings > Global Setup > Groups > Edit**, you'll need to add the managers to **the All Company Employees** group with the permission to **View Timesheets**, and to **Approve Individual Time Entries**.
6. Managers will then be able to go to **Manage Time > Manage Timesheets > Approve Time Entries** to view and approve time entries that have been worked within their Cost Center(s).

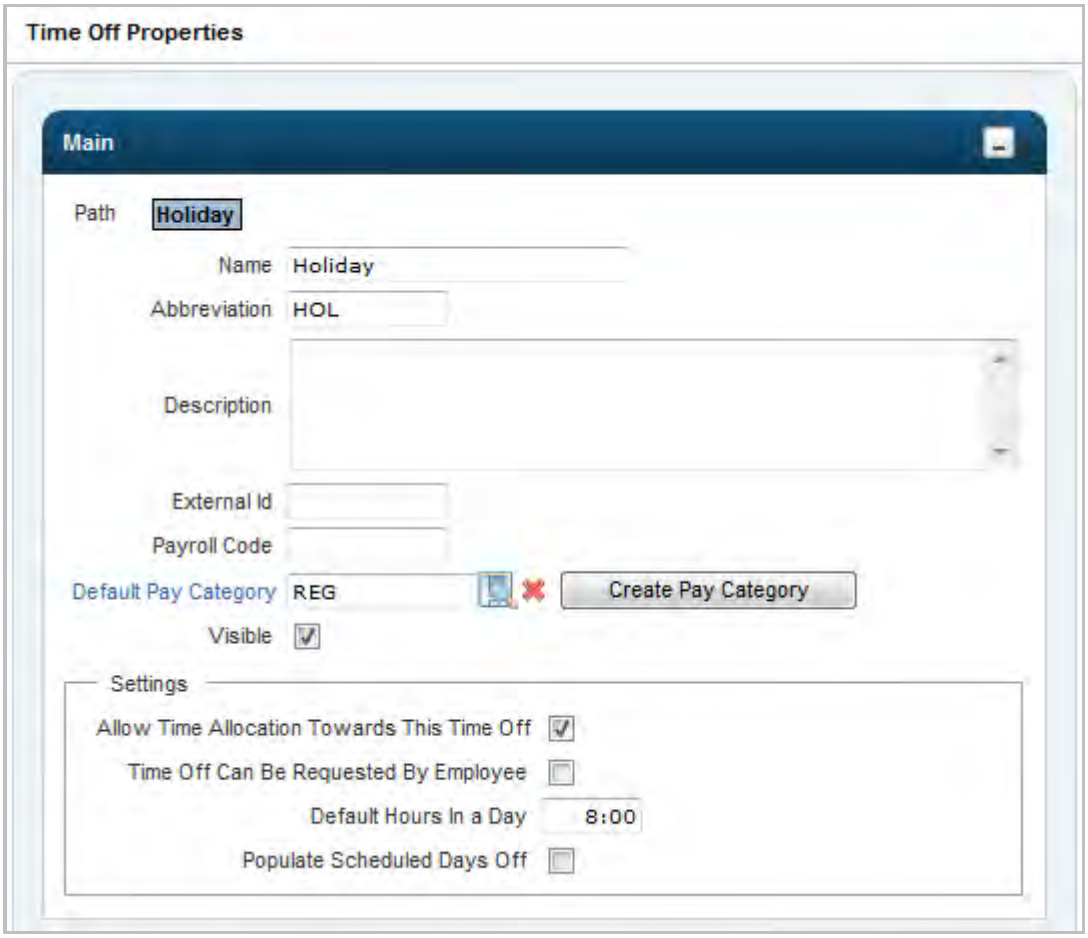
Creating Time Off Definitions

Time Off Definitions are the categories used within your organization to track Time Off. Typical categories that fall under Time Off in any organization include: Sick, Vacation, Jury Duty, Bereavement, Holiday, and Personal. In Web Based Time & Labor Management you can create any number of Time Off Definitions and organize them according to your company's policies.

To create a Time Off Definition:

1. Select **Company Settings > Global Setup > Time Offs**. The **Time Off Definitions** screen will display containing two parts. The left side lists any Time Off Definitions that are configured.
2. There are two options when creating **Time Off Definitions**; similar to cost centers, Time Off Definitions allow you to have a parent/child structure.

3. To add a new Time Off Definition at the top-most level (parent), select the item in the Time Off Definition list and click the Add New (Same Level) button.
4. To add a sub Time Off Definition (child) below an existing Time Off Definition, select the existing Time Off Definition you want to work with and click the Add New (Child) button.
5. You can then edit the properties of the Time Off Definition and click the Save button. The table below provides definitions for each field/setting.



- **Name -** name for the Time Off Definition.
- **Abbreviation -** abbreviation for the Time Off Definition.
- **Description -** brief description about the Time Off Definition.
- **Payroll Code -** payroll code that can be used when exporting data to payroll.
- **Default Pay Category -** specifies the category at which the time off is paid.
- **Admin Settings**
  a. **Visible -** allows you to hide the definition from being used in the future. This definition cannot be deleted if there is historical data tied to it.
- **Settings**

a. **Allow Time Allocation Towards This Time Off -** allows a user to allocate time on their timesheet to this definition.
b. **Time Off Can Be Requested By Employee -** allows this Time Off Definition to be requested by the employee through the Time Off Request tool.
c. **Default Hours In a Day -** default amount of hours to be paid when this definition is selected when requesting a full day off.
d. **Populate Scheduled Days Off** – check box if the system should automatically populate timesheets with approved Time Off requests charged to this category.

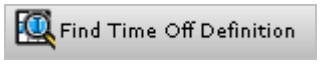
Tips on Managing Time Off Definitions

At some point you may need to modify or delete a Time Off Definition.

Go to **Company Settings > Global Setup > Time Offs** and use the following guidelines:

- To **modify a Time Off Definition**, select the item you want to modify and make your changes under **Time Off Properties**, and click the

button.
- To **delete a Time Off Definition**, select the item you want to delete click the

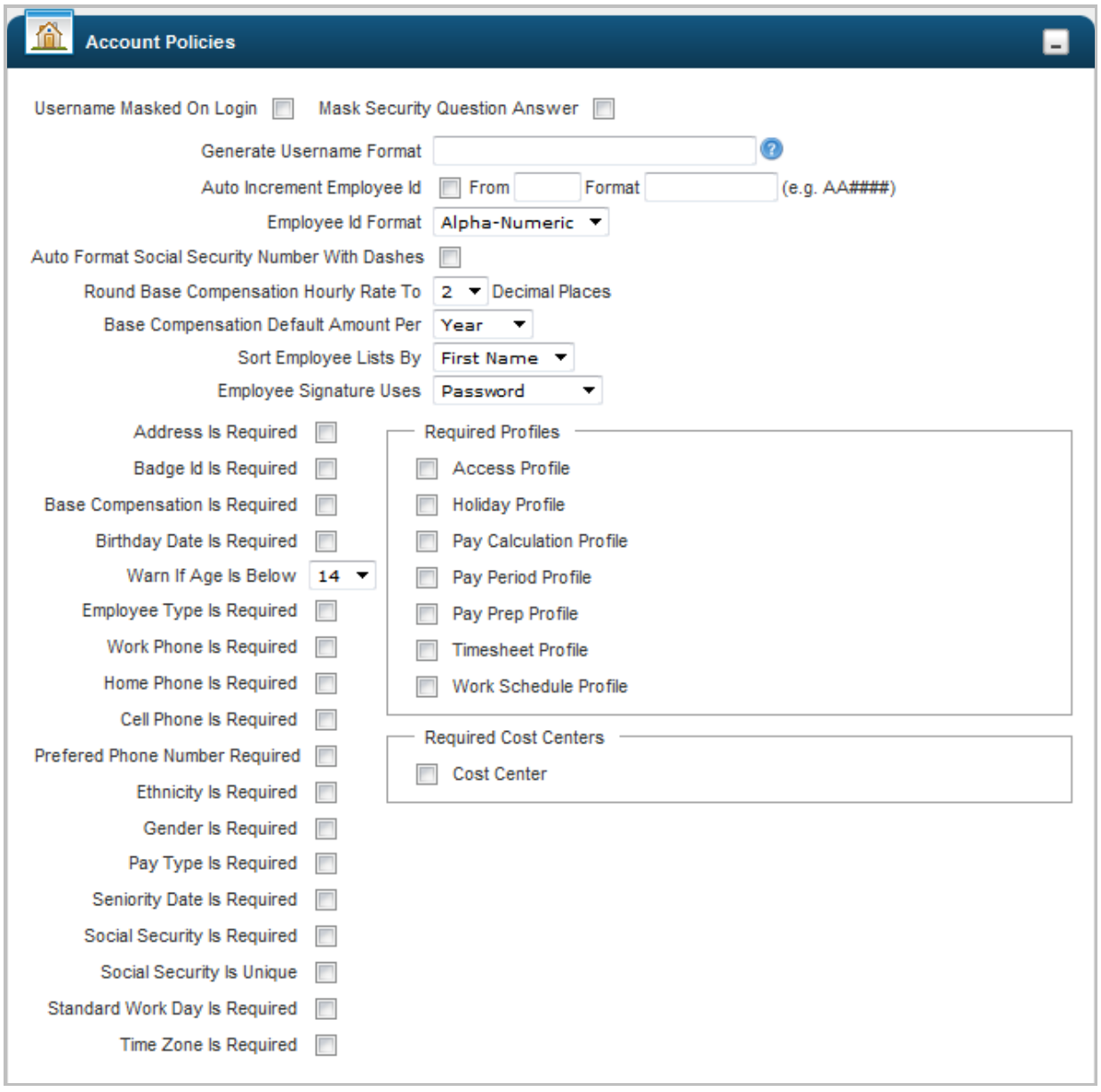
button. If this Time Off Definition has been assigned on any timesheets you will receive an error message alerting you that this Time Off cannot be deleted.
- To **search** for a **Time Off Definition**, click the 

button. Use the **Find Time Off Definition** screen to specify search criteria and then click the **Run** button.

Global Settings

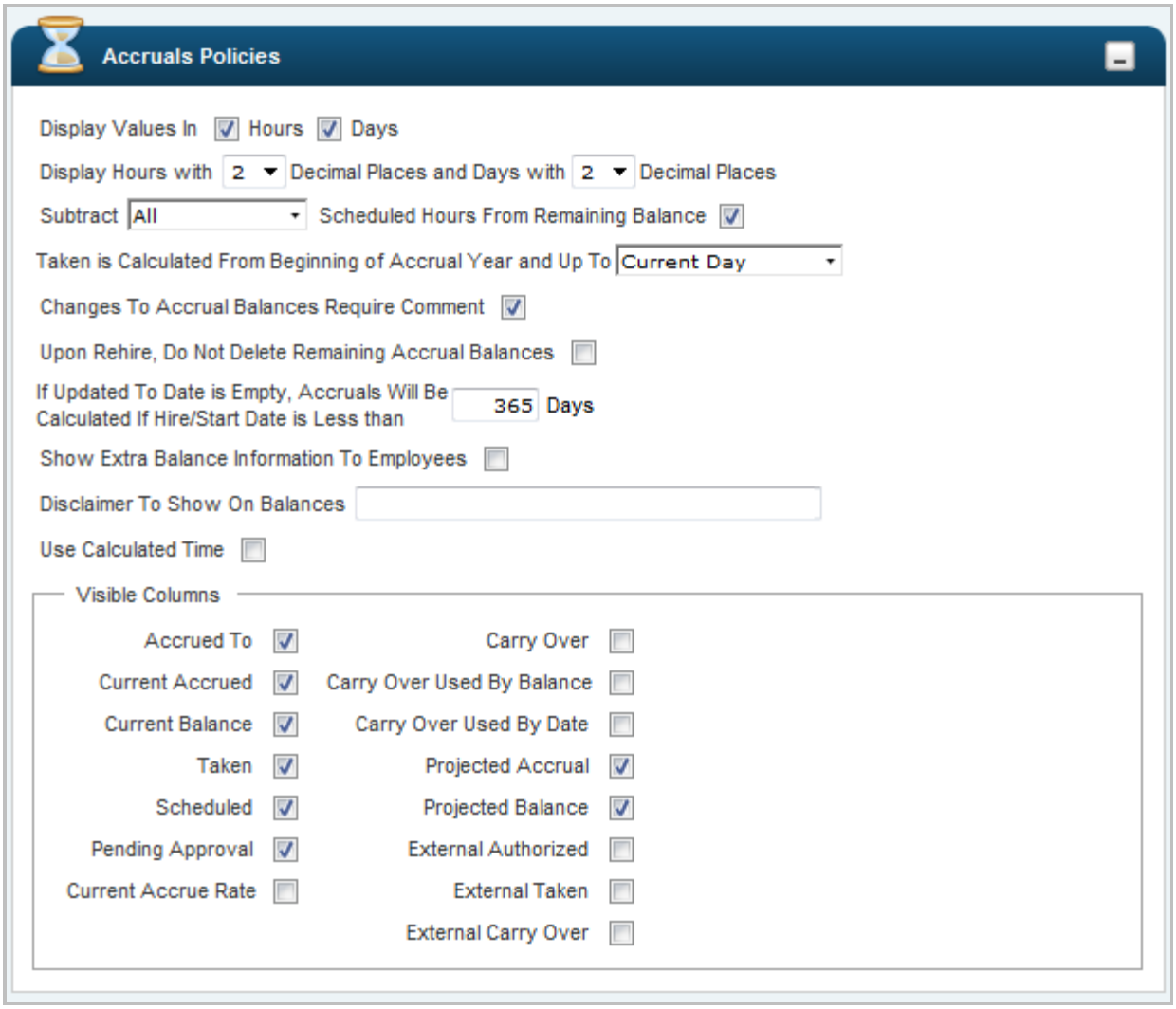
In Web Based Time & Labor Management you can set company policies that apply to all users, no matter what profiles they have been. Example: if an employee's username is their SSN, then you could have the username masked at login. To review these policies, go to **Company Settings > Global Setup > Company Set-up > Global Policies Tab**.

Account Policies



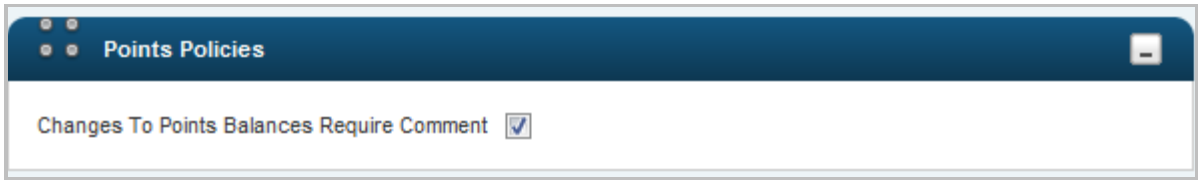
1. **Username Masked On Login -** masks the username on login.
2. **Mask Security Question Answer -** masks the Security Questions Answer
3. **Auto Increment Employee ID -** allows you to automatically generate employee IDs within the system.
4. **Required Fields**
   - Each check box enables the corresponding field in employee's file to be a required field when adding a new account. Therefore, information must be entered in this field and you will not be able to save the employee's file without filling out that field.

Accruals



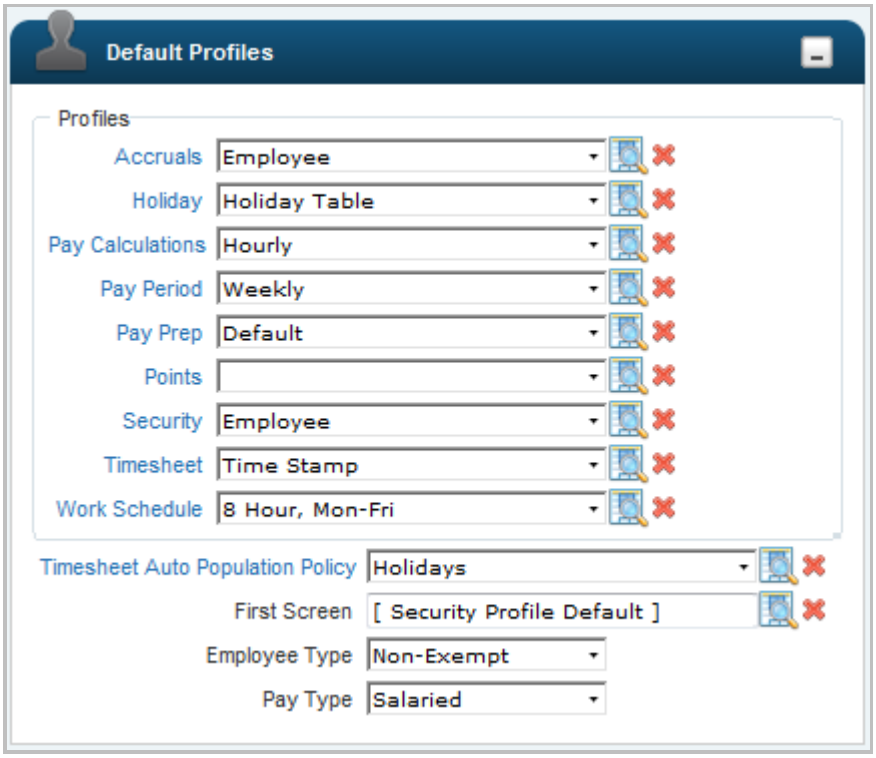
1. **Display Values In Hour/Days -** choose to display values in Hours, Days or both in an employee's file.
2. **Display Days with [ ] Decimal Places -** specifies number of decimal places for days balance in an employee's file.
3. **Subtract [Current Year, All] Scheduled Hours From Remaining Balances -** allows you to specify if scheduled time off will be deducted from an employee's accrual balance.
4. **Taken is Calculated From Beginning of Accrual Year and Up [Current Day, Up To Date] -** allows you to specify that taken time off should be considered from the beginning of the accrual year (based on the Anchor Date in the Accrual Profile), through the today's date, or an updated to date (as shown within the employee's file, in the Accruals window).
5. **Changes To Accrual Balances Require Comment -** forces a manager to add a comment if they modify an employee's accrual balance.
6. **If Updated To Date is Empty, Accruals Will Be Calculated If Hire/Start Date is Less than _____ Days** - allows you to execute accruals for anyone whose hire date is within 365 days from today, and prevents you from executing accruals if you have not set the employee's updated to date.
7. **Disclaimer To Show On Balances -** provides company with the ability to display a message to an employee in their accrual balance window.
8. **Use Calculated Time –** allows for accruals to execute based on the Employee's calculated time entries (including rounding rules, etc.) instead of just their raw punches.
9. **Visible Columns** - allows you to enable / disable which columns should display when reviewing accrual balances.

Points



1. **Changes to Points Balances Require Comment -** forces a manager changing point balances to leave a comment.

Default Values



1. Settings within this window determine the Profiles a user will be assigned upon creation of their account.
   - **Security -** the default Security Profile for new accounts created in the system.
   - **Holiday -** the default Holiday table to be applied to all new accounts in the system.
   - **Pay Period -** the default pay period to be applied to all new accounts enrolled in the system.
   - **Timesheet -** the default Timesheet to be applied to all new accounts enrolled in the system.
   - **Accruals -** the default Accruals to be applied to all new accounts enrolled in the system.
   - **Work Schedule -** the default Work Schedule to be applied to all new accounts enrolled in the system.
   - **Pay Prep -** the default Pay Prep to be applied to all new accounts enrolled in the system.
   - **Pay Calculations -** the default Pay Calculations to be applied to all new accounts enrolled in the system.
   - **Timesheet Auto Population Policy -** the default Timesheet type that will be auto populated.
   - **First Screen -** the default screen that will be displayed when a user first enters the system.

Creating E-mail Notifications

In Web Based Time & Labor Management you can set up notifications to alert selected users when a specific criterion has been met. Example: you might notify users when their timesheet is due, or you might notify managers to review submitted timesheets and Time Off requests. Web Based Time & Labor Management offers several notification rules you can work with.

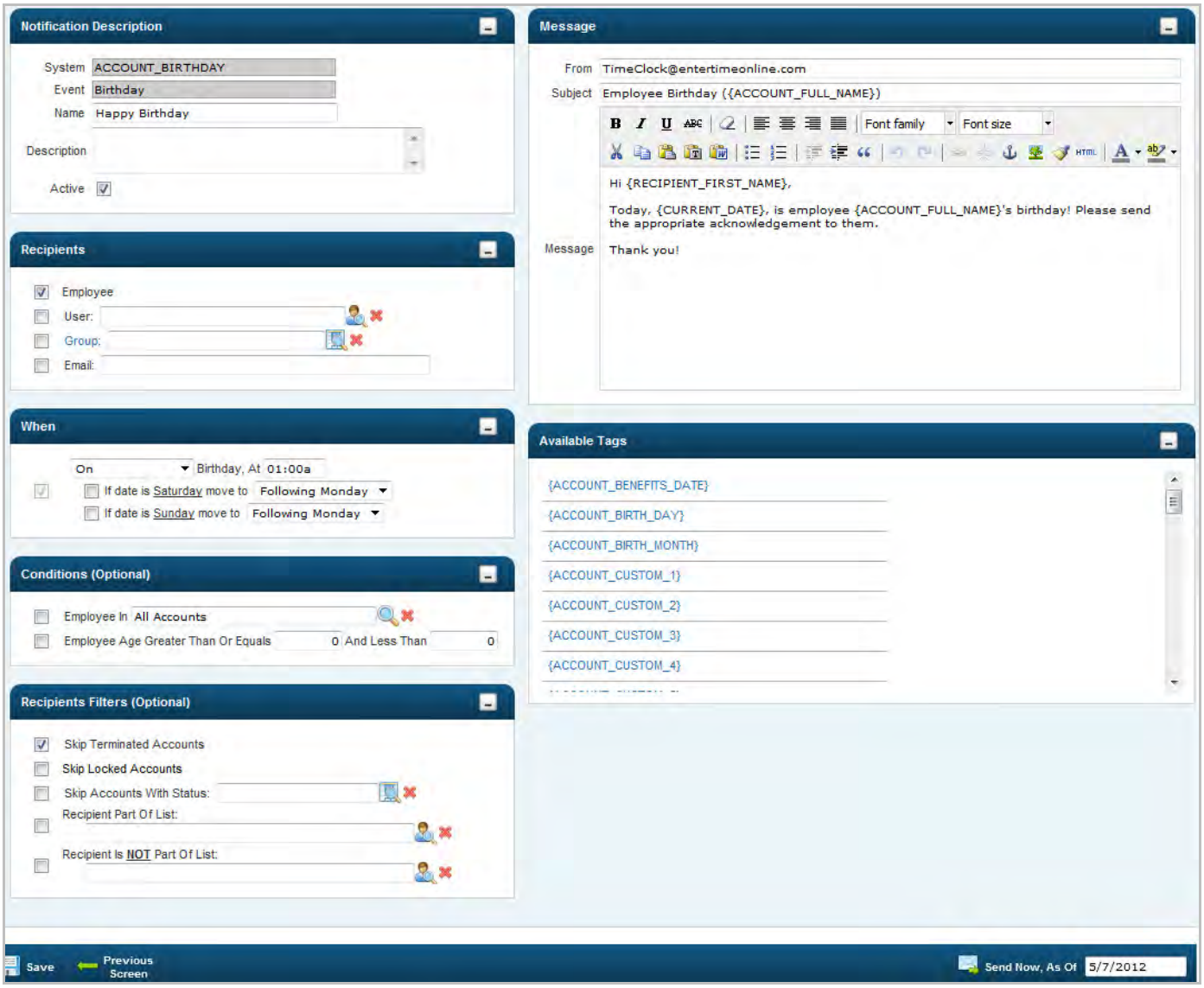
To set up a System Notification:

1. Go to **Company Settings > Global Setup > Notifications.**

2. The **Company Notifications** screen displays. Click on the

button to display the screen that contains the scenarios for which you can create notifications.

3. Within the **Available Notification** screen you will see the notification type, title, and description. Click the icon next to the scenario you want to work with. In the example below we are working with the Account Birthday notification.



4. Use the fields provided on the **Notification Information** screen to configure the rules associated with the notification you selected. The fields may vary depending on the notification you selected. Make sure you select the appropriate recipients for the notification and include an appropriate message. You can also apply conditions and filters to this notification.
   - **Notification Description -** allows you to enter in the name and description of this notification. The **Enable** check box allows this notification to be active.
   - **Recipients -** allows you to specify the recipients of this notification.
   - **Message -** contains the following fields:
     a. **From** - must follow standard e-mail convention (email@domain.com)
     b. **Subject -** what the recipients of the notification will see in the subject line of this notification.
     c. **Message -** the body of your notification.

d. **When -** allows you to select the time and date that you want to send the message out, as well as alert you to the last time the notification was scheduled to run. If the notification already ran for that day, any changes you make would be available on the next run. Only available on certain notifications.

e. **Recipients Filters (Optional) -** allows you to filter the recipients you have selected within the Recipient window.

- **Available Tags -** auto-text can be used in the message area of a notification to automate your message. To add a tag, first place your mouse within the message body (click to set) and then click the tag you want to include.

Tip: You can personalize the message in the notification by including names, for example, the recipient's name. Use the **Available Tags** area to select the data types you want included in the message. Simply click the data type to insert it into your message.

5. Click

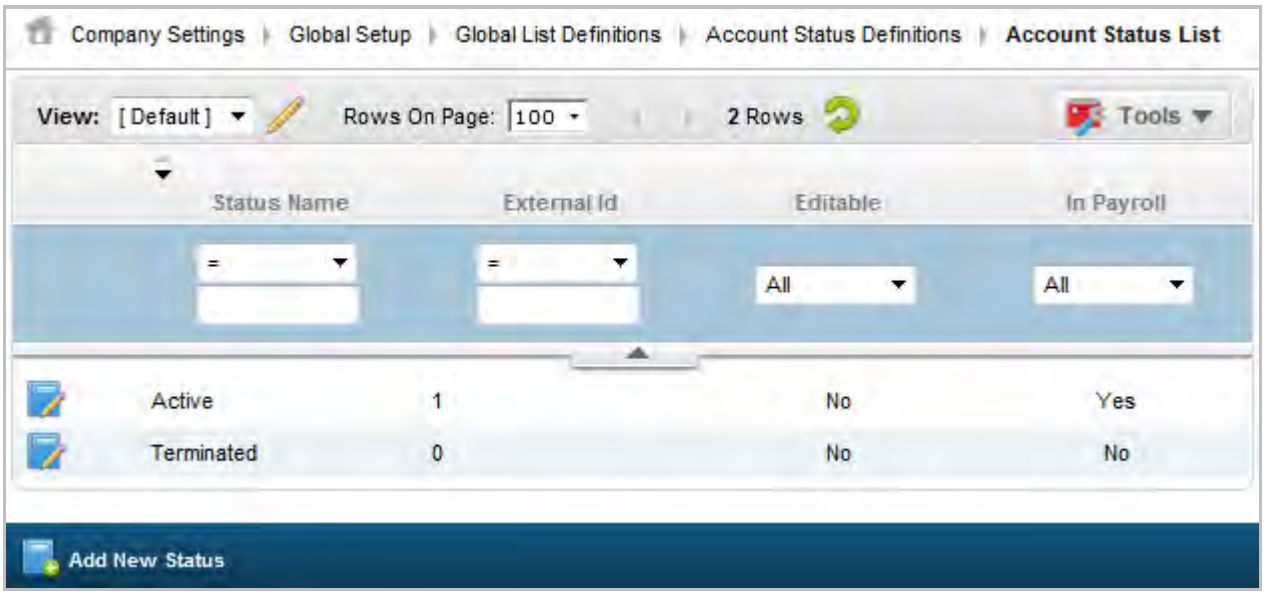
when finished.

Creating List Definitions

In Web Based Time & Labor Management you can set up company-defined lists to configure the system to match your company definitions. Example: you can create a company-defined list to identify a user's account status, pay type, or employee type.

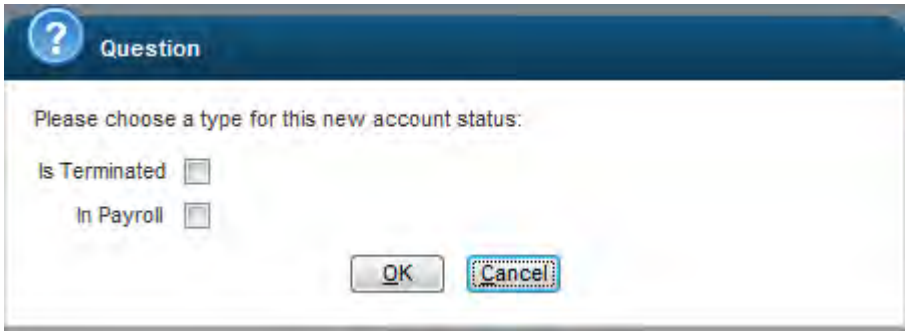
To set up an Account Status Definition:

1. Go to **Company Settings > Global Setup > Global List Definitions > Account Status Definitions.** The **Account Status List** screen displays **Active** and **Terminated** by default. These definitions have pre-configured meanings in the system and cannot be modified.



2. To create a new account status, click on the

button. The **New Account Status** screen displays.



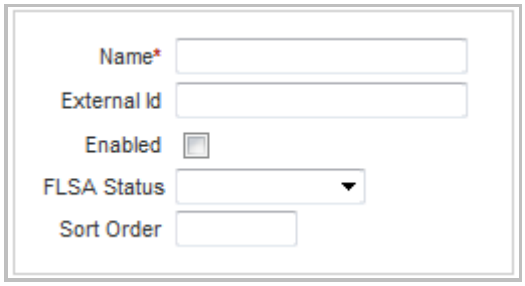
3. Enter the **Name** for the new status and check the box for **In Payroll** if this status is considered payable. The **External ID** field allows you to attach a number or code associated with this status.
4. Click on the

button.

To set up an Employee Type:

1. Go to **Company Settings > Global Setup > Global List Definitions > Employee Types.** The **Employee Types** screen displays **Exempt, Non-Exempt,** and **Consultant**; the number of employees assigned to this type, and the date the employee type was created.
2. To create a new employee type, click on the

button. The **Edit Employee Types** screen displays.



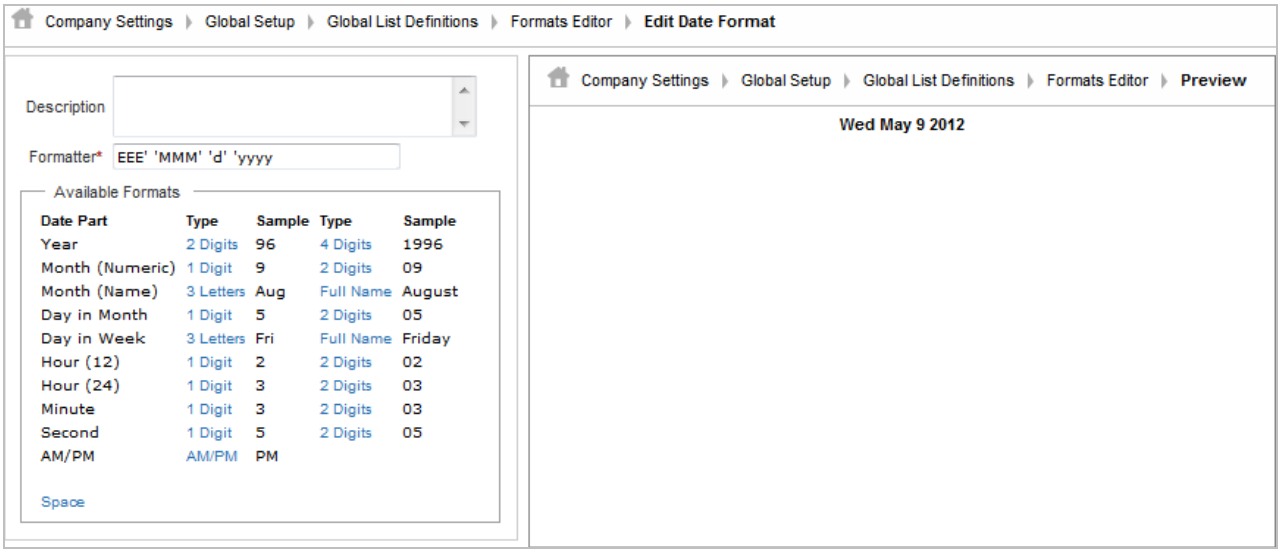
3. Enter the **Name** for the new type. The **External ID** field allows you to attach a number or code associated with this status.
4. Click on the

button.

To set up a Company Date Formatter:

1. Go to **Company Settings > Global Setup > Global List Definitions > Formats Editor.** The **Company Date Formatters** screen displays the system defined date format values, descriptions, and the created date.
2. To create a new date format, click on the

button.
3. The **New Date Formatter** screen will appear.
4. Enter in a description for this new date format and build the date code by selecting the blue hyperlink words in the **Type** column.
   - In order to create a setting which reads **Tue July 24 2007** take the following steps:
     a. Select **3 Letters** next to **Day in Week,** and press the **Space** tag at the bottom of the screen.
     b. Select **3 Letters** next to **Month (Name),** and press the **Space** tag.
     c. Select **1 Digit** next to **Day in Month**, and press the **Space** tag.
     d. Finally, select **4 Digits** that is across from **Year**.
     e. The example below displays your results.

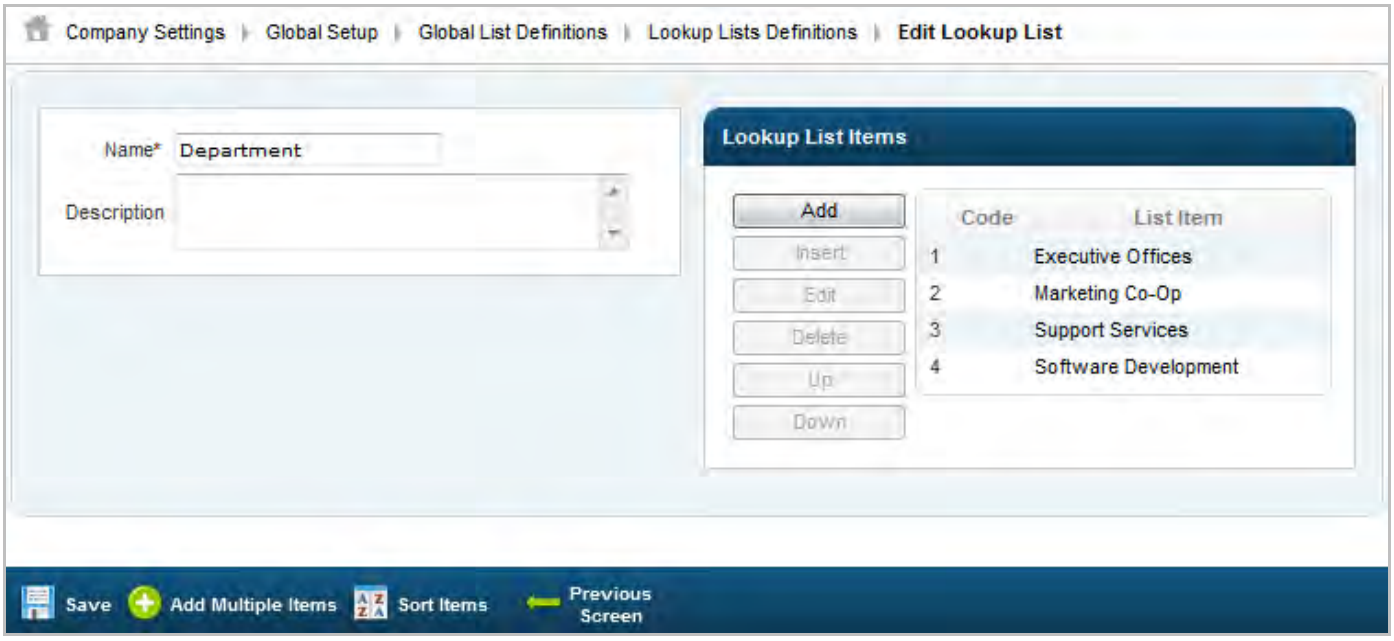


5. Click on the Save button to add the new date format list.
6. The date formats list is accessible in the **Company Configuration** window, under **Company > Company Configuration** in the box labeled **Formats.** There is a field called **Date & Time,** where you can select the format you have created.

To set up a Lookup List:

1. Go to **Company Settings > Global Setup > Global List Definitions > Lookup Lists Definitions.** The **Lookup Lists** screen is shown below.
2. You can define your own company lists and they can be tied to custom fields, reason codes, etc. These lists will become drop down choices for these fields in the employee file **(Account Extra Fields)**, in cost center definitions **(Cost Center Extra Fields)**, or in the timesheet **(Time Entry Extra Fields)**.
3. To create a new lookup list, click on the Add New Lookup List button.
4. Enter the list name and description for this list, and click the Save button.
5. To add an item to the list, click on the Add button in the **Lookup List Items** window. Type in an **Item Value** name and click on the Add button in the **Add New Item** window.

6. Repeat this procedure until all list items are added.



7. To add multiple items at a time, click on the

button. You are able to cut and paste lists from external sources. Once you have completed your list select the

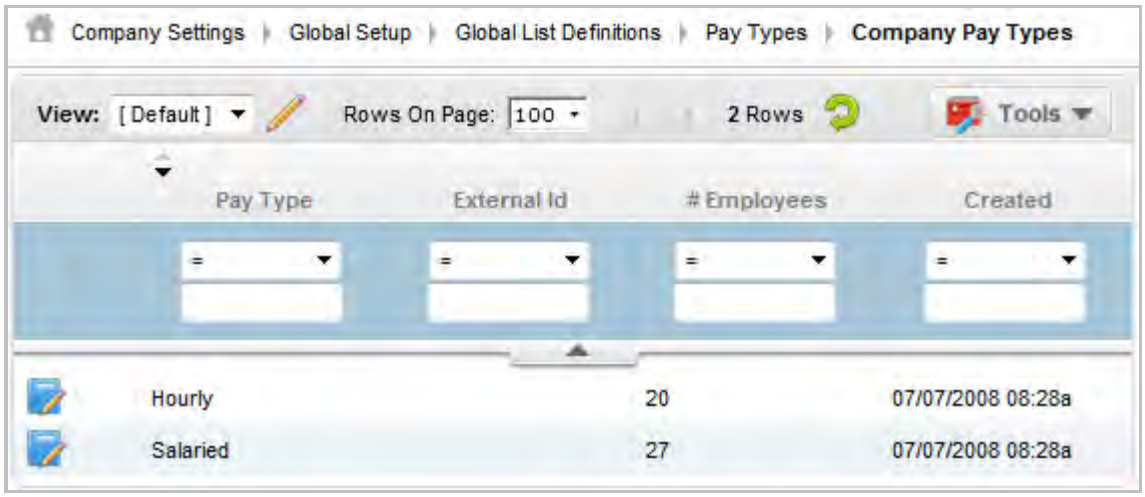
button in the **Add Multiple Items** window.
8. To Insert, Edit, or Delete the list items on this list use the appropriate buttons in the **Look Up List Items** window. You can also change the order of the list using the

button.
9. Click on the

button to save the list.

To set up a Pay Type:

1. Go to **Company Settings > Global Setup > Global List Definitions > Pay Types.** The **Pay Types** screen display shows the system defined pay types (hourly and salaried); the number of employees assigned to this type, and the date the pay type was created.



2. To create a new pay type, click on the

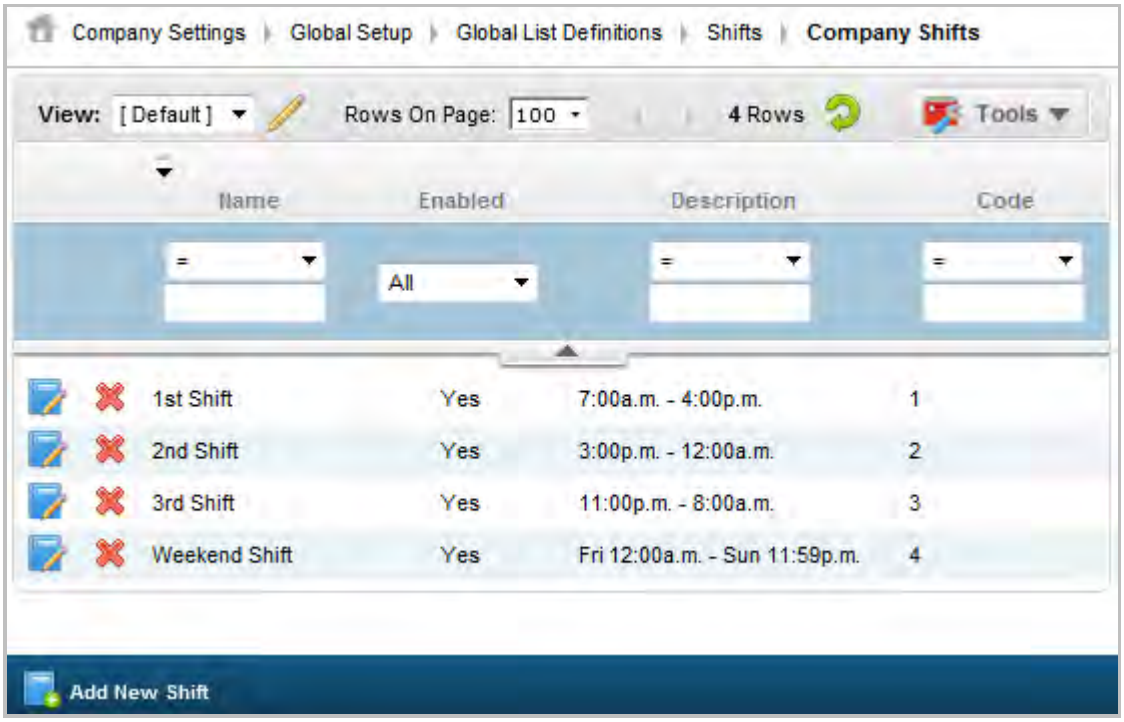
button.

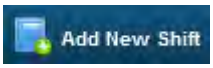
3. Enter the **Name** for the new type. The **External ID** field allows you to attach a number or code associated with this status.
4. Click on the

button.

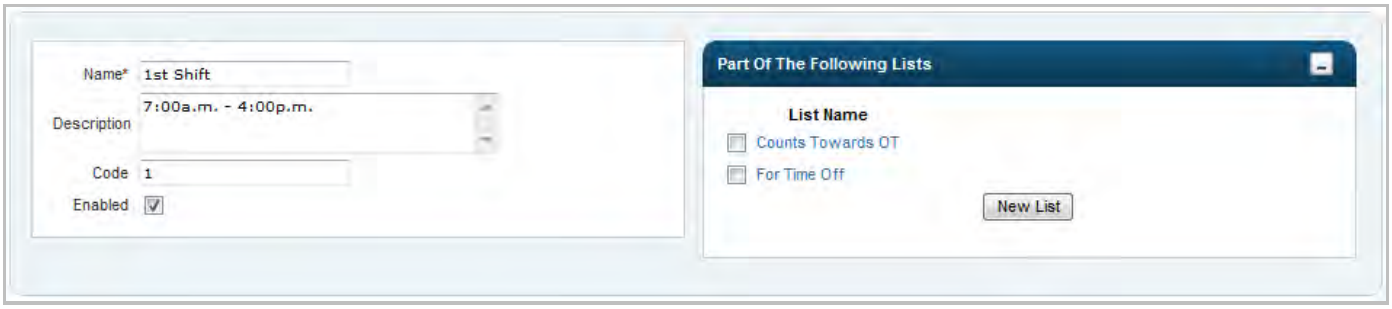
To set up a Shift Definition:

1. Go to **Company Settings > Global Setup > Global List Definitions > Shifts.** The **Company Shifts** screen displays. Within this screen you are able to define shifts to categorize time entries.



2. To create a new shift definition, click on the 

button.



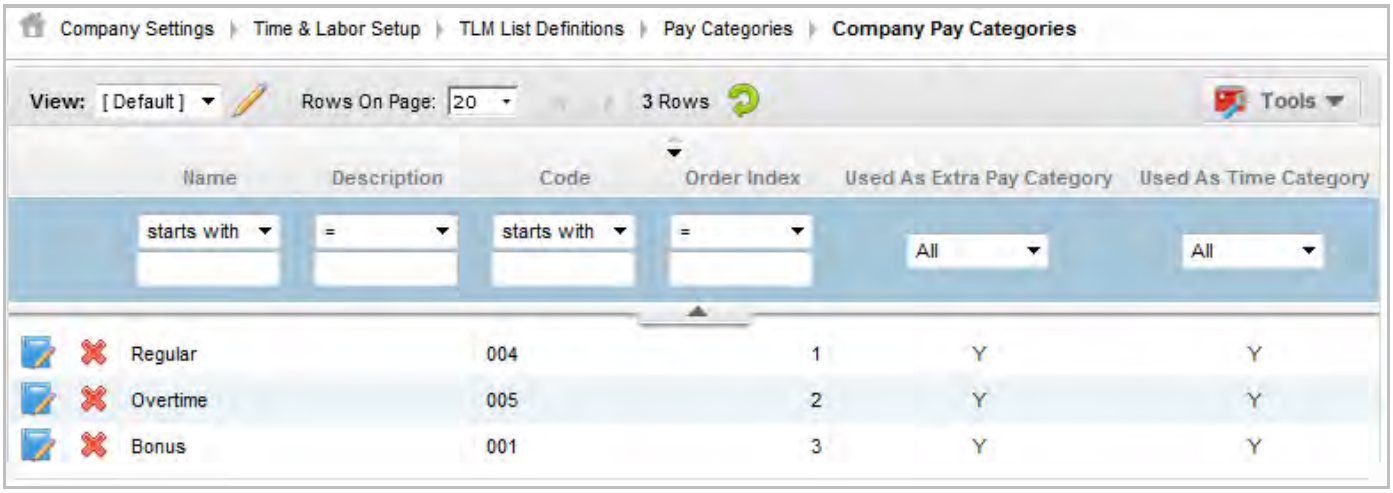
3. Next type in a **Name**, **Description**, and **Code** (if applicable) for this shift. If you want this shift definition to be enabled in the system, select the **Enabled** check box.
4. In the **Part Of The Following Lists** box, you now have the ability to view which lists this shift is a part of.
5. Click on the

button to save this shift definition.
6. Click on the

button. The new shift definition has now been added to **Company Shifts** screen.

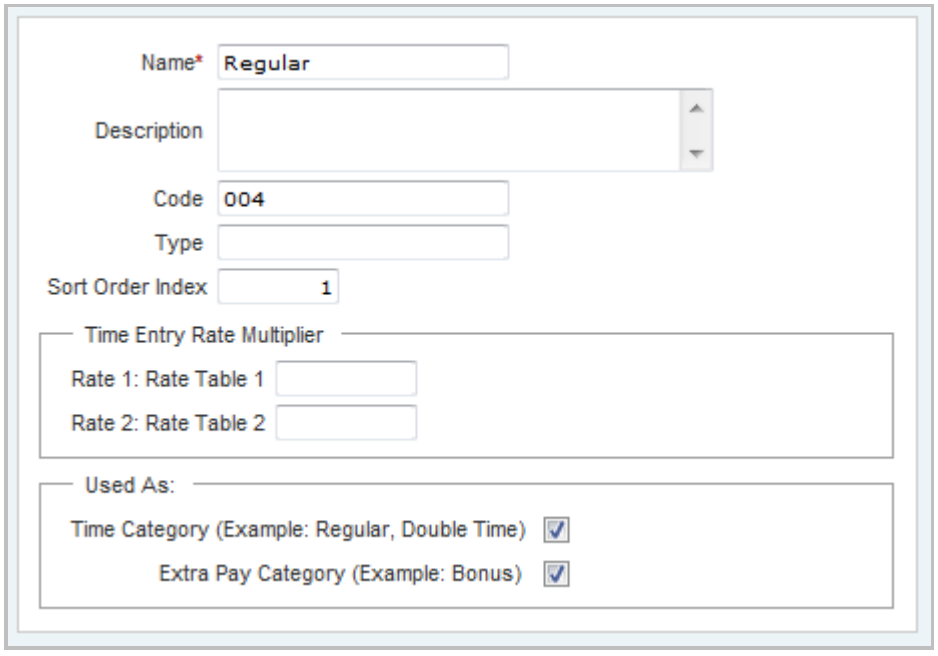
To set up a Pay Category:

1. Go to **Company Settings > Time & Labor Set-up > TLM List Definitions > Pay Categories**. Pay categories allow you to classify records in terms of how worked time is paid. Example: Overtime hours are paid differently than a Bonus (flat dollar amount).



2. To create a new pay category, click on the

button.
3. The **Edit Pay Category** screen is shown below.



- **Name** - enter the name of the Pay Category.
- **Description** - enter a brief description about your selected Pay Category.
- **Code** - enter in a code for this selected Pay Category, it can be letters or numbers.
- **Type** - enter in the selected Pay Category Type.
- **Sort Order Index** - allows you to specify the order in which categories will appear on reports.
- **Time Entry Rate Multiplier** - allows you to apply a multiplier to the rate per pay category. In the example above, we are defining a rate multiplier against two different rate tables: **Rate 1**: **Base Rate,** and **Rate 2: Diff. Rate.** This step is **REQUIRED** if you are interested in exporting rate information to payroll or running reports on rates.
- **Used As Time Category** - specifies that this category will be tracked against hours.

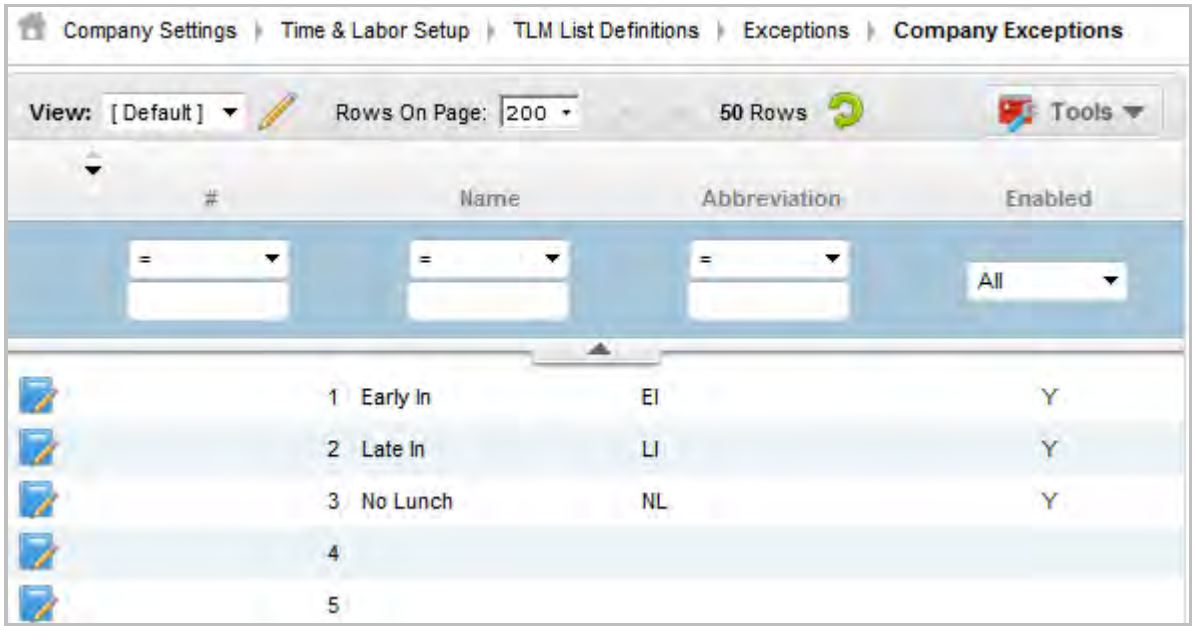
- **Used As Extra Pay Category** - specifies that this category will be tracked against dollars. **NOTE:** if needed both time and extra pay check boxes can be enabled.
- Click on the

button to save this pay category.
- Click on the

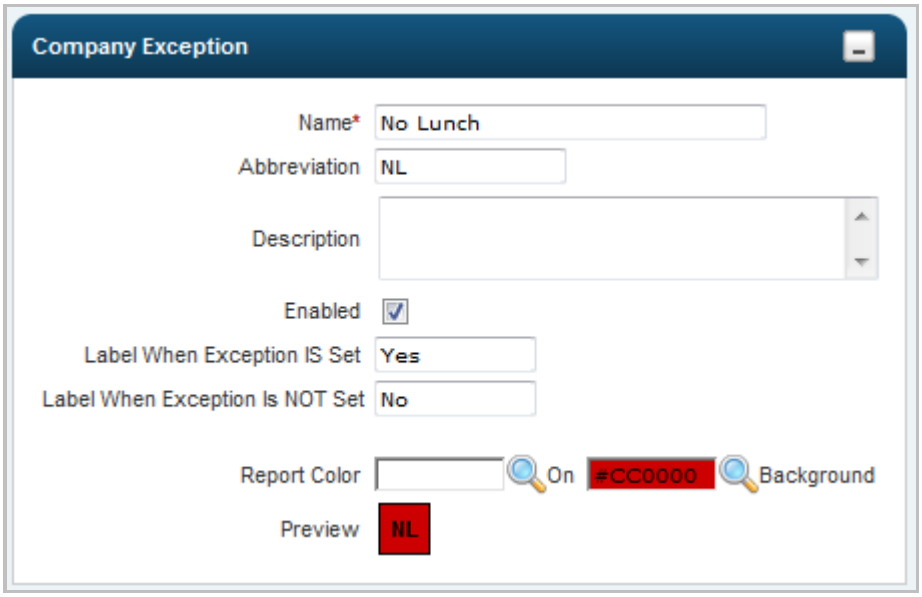
button. The new pay category has now been added to the **Company Pay Categories** screen.

To set up Exceptions:

1. Under **Company Settings > Time & Labor Setup > TLM List Definitions > Exceptions**, you can create **Exceptions**. This option allows you to define certain exceptions that can be flagged on the timesheet (i.e. late, early, no lunch).



2. By clicking on the icon, you have the ability to define an Exception.

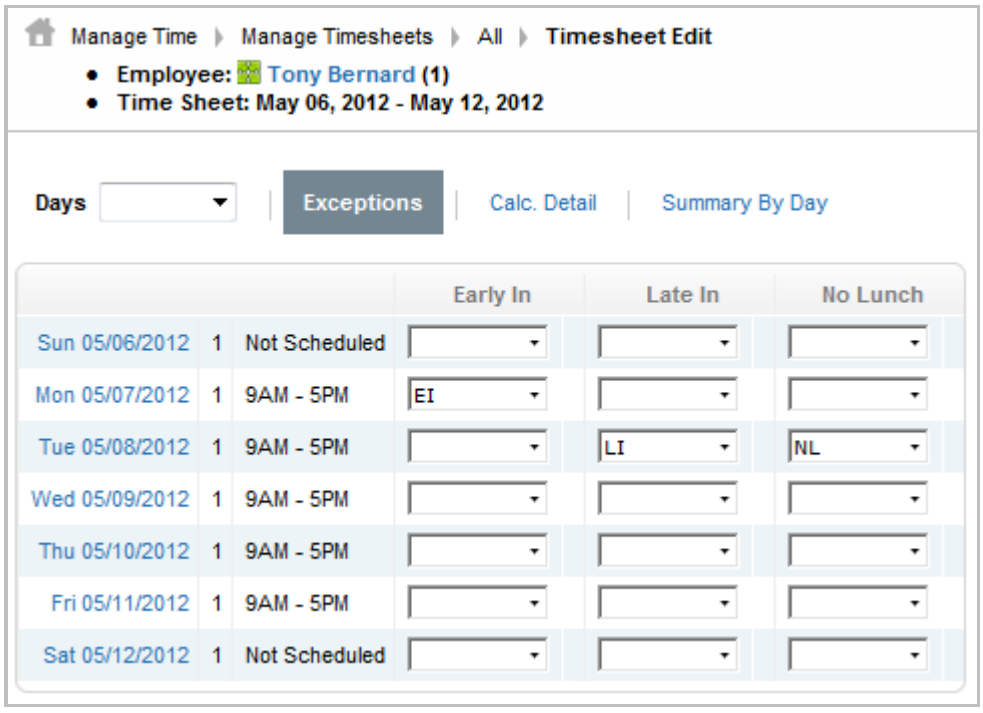


- The **Abbreviation** field should list the code associated with this Exception and will display in Exception reports and on the employee's timesheets.

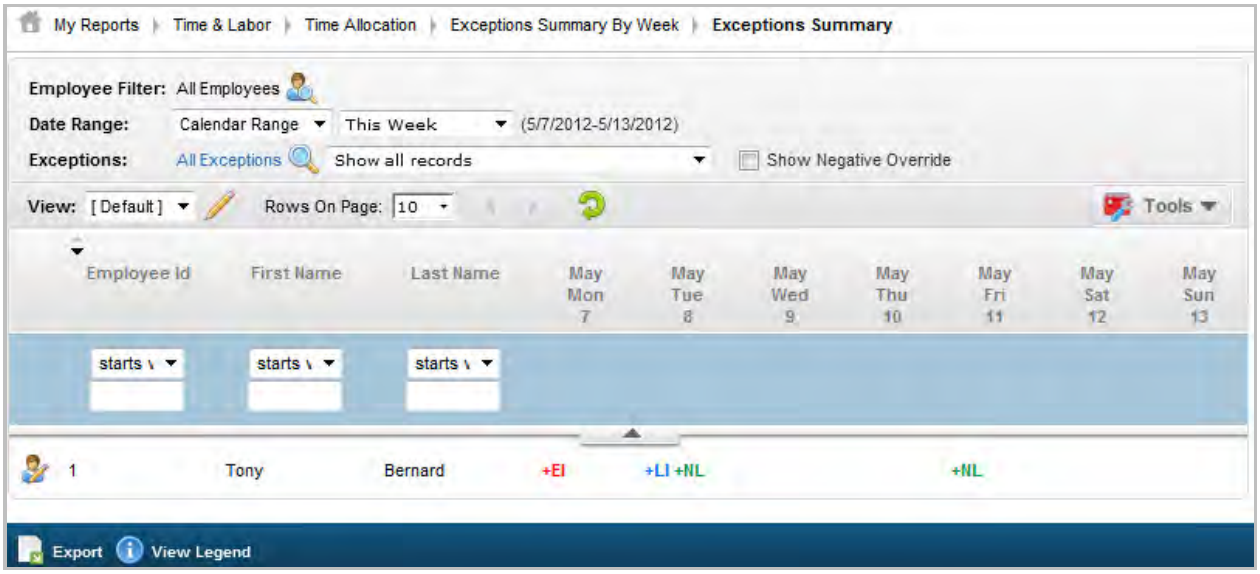
- The **Enabled** checkbox allows you to enable/disable this Exception. For example, if you decided to discontinue the use of an Exception, you would uncheck this box.
- **Report Color** determines the color of the Abbreviation when displayed within Exception reports.

3. Then, under **Company Settings > Profiles/Policies > Timesheets**, you can enable which Exceptions should be displayed on the employee's timesheet. Enabling Exceptions will create a separate tab on the timesheet to track Exceptions. You also have the ability to allow employees to see and even edit some (or all) of the Exceptions.

4. Then, within the employee's timesheet, you'll now see an **Exceptions** tab. On the Exceptions tab, you will see a column for the employee's scheduled hours, as well as one column per Exception enabled. Here, you're able to manually set Exceptions on the timesheet, which will display within Exception reports.

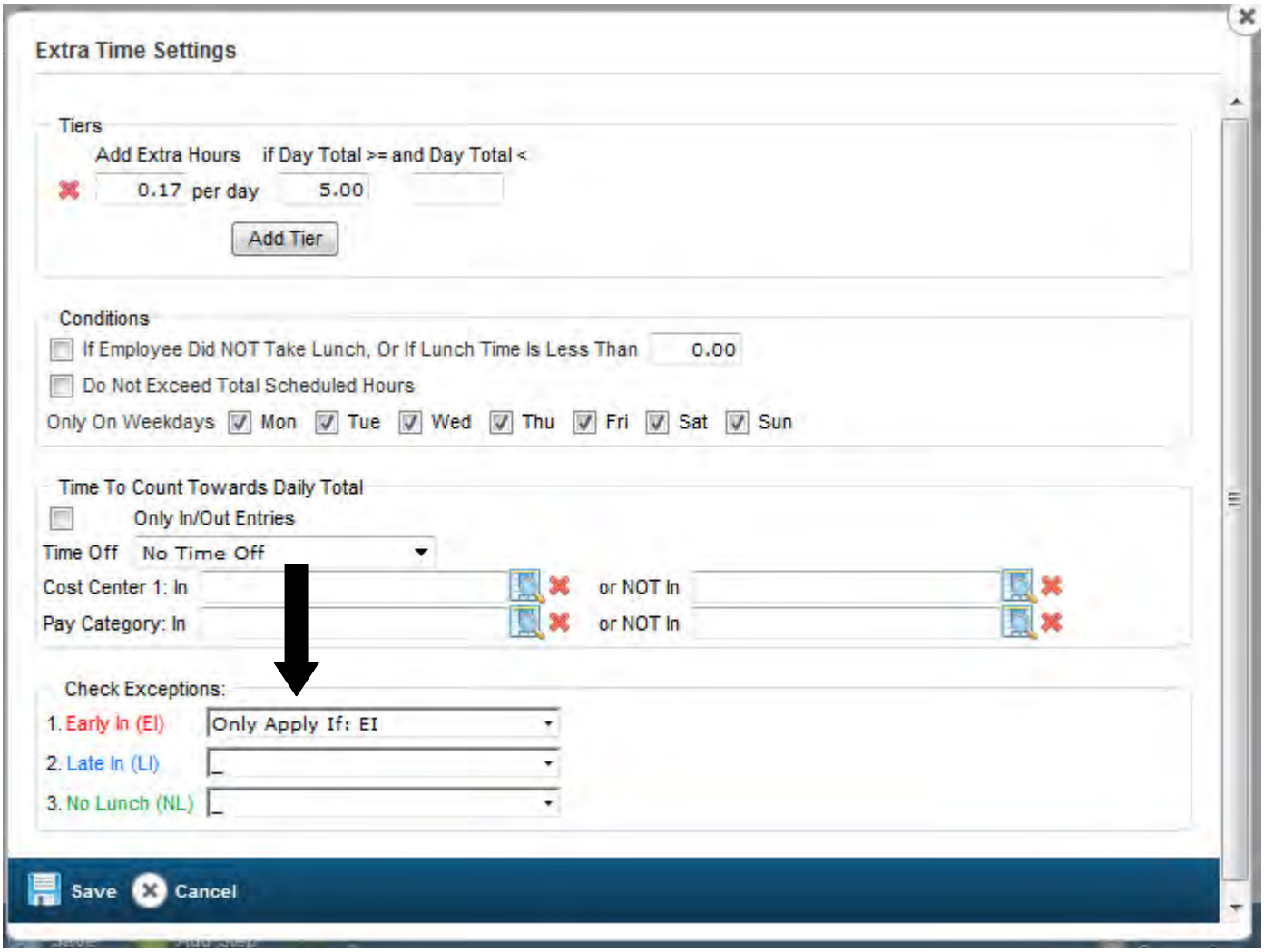


5. Next, under **My Reports > Time & Labor > Time Allocation**, there are two reports labeled **Exceptions** and **Exception Summary By Week**. The Exception Summary By Week report will display, per employee, any Exceptions flagged within a specific date range, color coded based on the Exception configuration. Then, by clicking on an Exception, you will be taken to the employee's timesheet and to the day where the Exception is flagged. The **Exceptions** report will show you a more detailed view of the Exceptions.



6. You can also click on the **View Legend** button (shown above) to see a quick view of each Exception with both color and abbreviation.

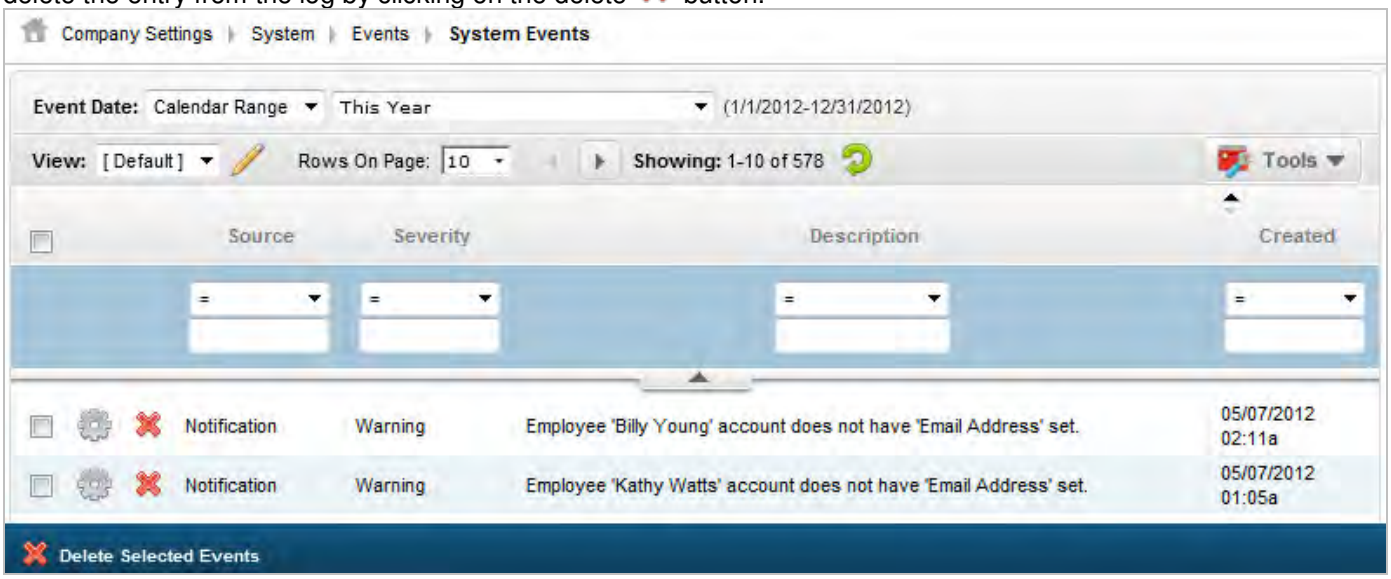
7. Within the **Pay Calculations Profile**, you can specify that certain rules should not apply based on an Exception being flagged in the employee's timesheet. **Deduct Lunch** and **Add Extra Time** rules currently support this functionality. In the example below, the system would only add an extra 10 minutes of time if the employee had the Early In exception set to **Yes** on their timesheet.


Extra Time Settings
Tiers
Add Extra Hours
if Day Total >= and Day Total <
0.17 per day
5.00
Add Tier
Conditions
If Employee Did NOT Take Lunch, Or If Lunch Time Is Less Than
0.00
Do Not Exceed Total Scheduled Hours
Only On Weekdays
Mon
Tue
Wed
Thu
Fri
Sat
Sun
Time To Count Towards Daily Total
Only In/Out Entries
Time Off
No Time Off
Cost Center 1: In
or NOT In
Pay Category: In
or NOT In
Check Exceptions:
1. Early In (EI)
Only Apply If: EI
2. Late In (LI)
3. No Lunch (NL)
Save
Cancel

System Events

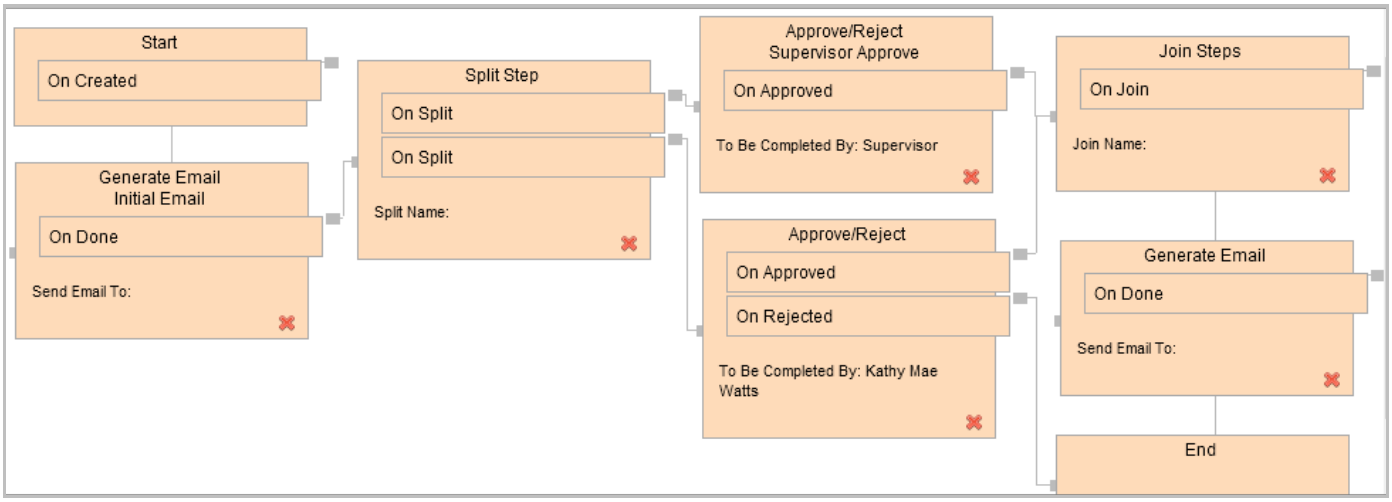
System Events are error messages and/or warnings that are generated based on certain actions or events that occurred within the system. Example: a badge ID was not recognized at a clock.

To check the System Events log, go to **Company Settings > System > Events.** The related page button will take you to a screen where you should be able to correct the issue. Once the issue has been addressed, you can delete the entry from the log by clicking on the delete button.



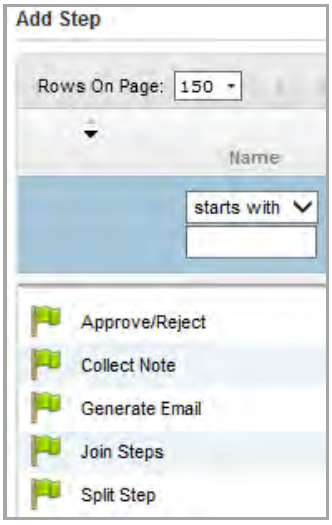
Workflow for Time Off & Overtime Requests

In Web Based Time & Labor Management you can set up custom workflow profiles for Time Off and Overtime Requests, which will allow for multiple layers of approval and rejection. Users will need to be given access to view, create, edit, and/or delete Workflow Profiles within their specific Security Profile.



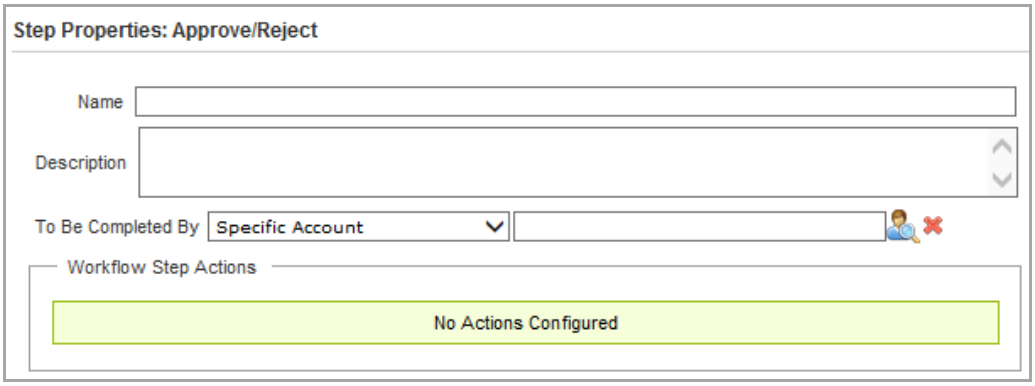
To set up a Time Off or Overtime Request Workflow:

1. Go to **Company Settings > Global Setup > Workflows**.
2. A default Time Off Workflow can be added by clicking on the "Add Default" option. Otherwise, a new Profile can be created by clicking "Add New."



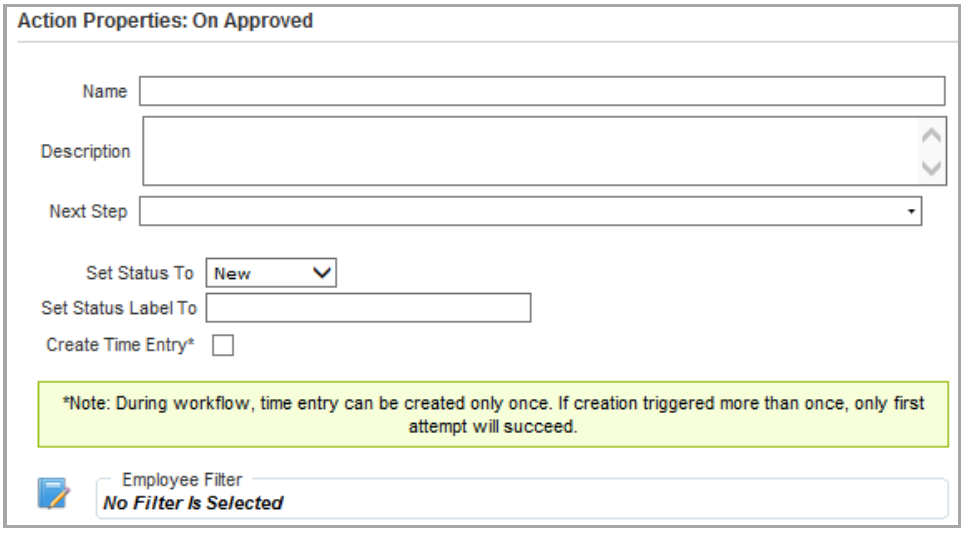
3. To add a step, click "Add Step." Here, the type of step can be selected, which will determine what configuration is needed. The options are as follows:
   - **Approve/Reject:** allows you to configure what should happen when a request is either approved or rejected.
   - **Collect Note:** will display specific (entered) text to a user.
   - **Generate Email:** allows you to configure an e-mail to be generated based on the steps (i.e. when a request is approved, send that notification to the employee).
   - **Join Steps:** allows you to join steps together. For example, once a notification is approved by Level 1 and Level 2, those separate steps should come together to generate one approval e-mail to the employee.
   - **Split Steps:** allows you to specify what should happen when a step may have multiple outcomes. For example, a manager receives the request and has the ability to either approve it, or reject it. In the event it is approved, a time entry should be created and an email generated. In the event it is rejected, an email should be generated, and there is no need for a time entry to be created.

   Once a step is selected, it will automatically be added to the workflow screen. You then have the ability to double-click on it to configure the step as needed, and then move it around the workflow screen.

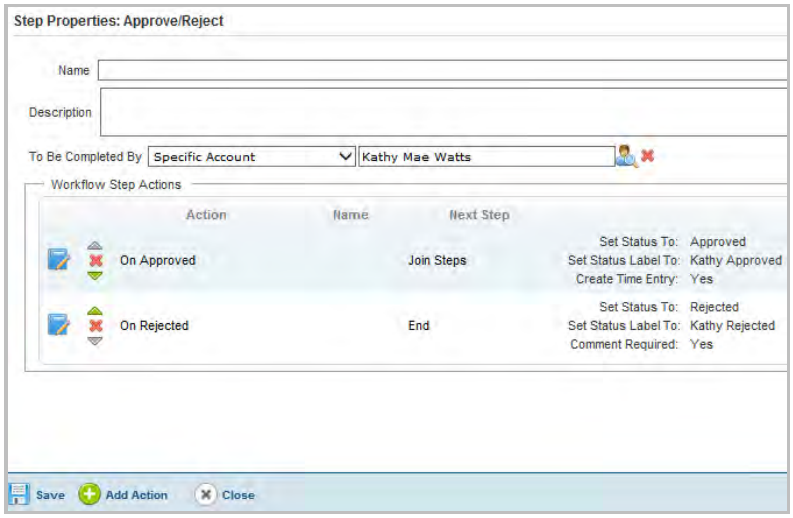


4. In the example above, the **Approve/Reject** step has been added.
   - **Name** – the name of the step
   - **Description** – a brief (not required) description of the step
   - **To Be Completed By** – allows you to select a specific account, group of users, time off request handler, employee, or manager
   - **Workflow Step Actions** – allows you to add the specific steps associated with the workflow step

5. In the example above, the **Approve/Reject** step has two options: On Approved, and/or On Rejected.



6. Similar to the initial step, the **Action** needs to be configured with the following:
   - **Name** - name of the action
   - **Description** - brief (optional) description of the action
   - **Next Step** - this will connect the current step (i.e. approving the request) to the next step in the workflow (i.e. sending an e-mail notification to the employee alerting them of their approved request)
   - **Set Status To** - will change the status of the time off request, to either new, approved, or rejected once this step is completed
   - **Set Status Label To** - allows you to determine what the status should display as within the system (will be new, approved, or rejected by default)
   - **Create Time Entry** - if enabled, will create a time entry based on the approval of the employee's request.
   - **Employee Filter** - will allow you to filter so this action applies only to certain employees

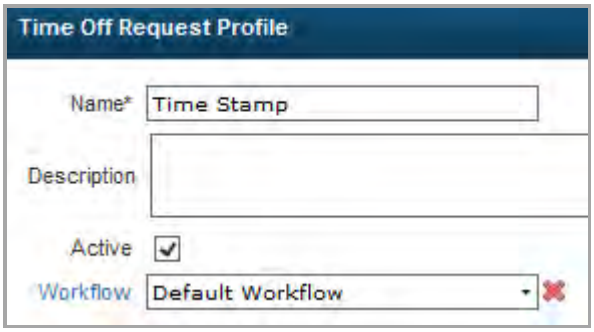


NOTE: When enabling or subsequently disabling Workflow for Time Off Requests, any pending requests will be discarded. Please ensure that all exiting Time Off Requests have been taken care of (approved, rejected, etc.) *PRIOR* to enabling or disabling Workflow.

Once a Workflow is created, the settings need to be adjusted **under Company Settings > Global Setup > Company Setup**. Here, a widget for "Workflow Policies" will need to be added by editing the Tabs. The box for "Use Workflow for Time Off Requests" will need to be enabled.

When selected, a confirmation will pop-up to remind you that in-process Time Off Requests will be discarded and Time Off Request e-mails will no longer work, as notifications will need to be configured in the Workflow itself.

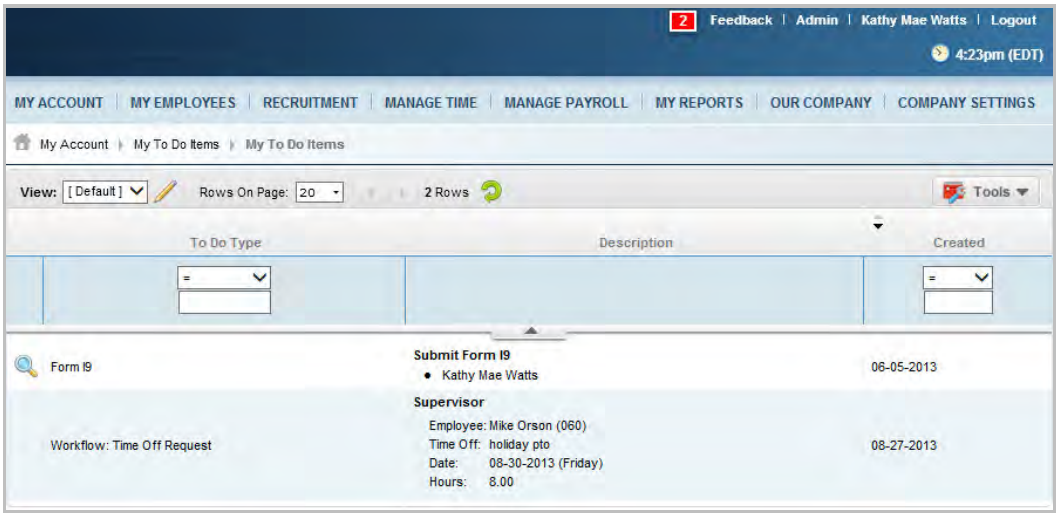
The Time Off Request Profile will then need to be adjusted under **Company Settings > Profiles/Policies >Timesheets**. Within the appropriate Profile's Time Off Settings, a new Time Off Request Profile will need to be added, and the Workflow Profile that should be used for this Timesheet Profile can be added.



Workflows for Overtime also include steps for "Activate Contract" and "Sign Opt-Out" which can be configured similarly to the Time Off Workflows.

To Do's

For companies utilizing Workflow, To Do's will be automatically created, and can be tracked accordingly. Access to To Do's can be granted under the ESS Tab of the Security Profile. To Do's will be created automatically based on Workflow and Requests that require action by the user.



Users will automatically see a number in red in the upper right-hand corner of their screen, alerting them of any To Do's. Those To Do's that are assigned to a user and require action on their part can be viewed **under My Account > My To Do Items**, as seen above.

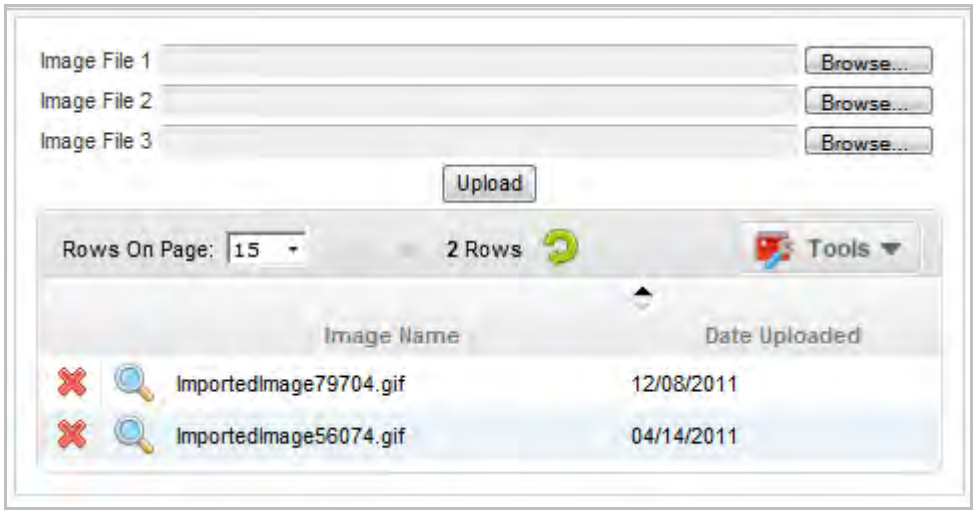
Changing the Interface Look and Feel

Web Based Time & Labor Management allows you to control the look of the system. The following system components are configurable:

- **System Header -** the top section of the screen that contains your company's logo and background image.
- **Menu** - the pull down bars (Example: Company, Functions, My Settings, etc.)
- **Floating Bar -** the navigation bar at the bottom of your screen.
- **Body -** allows you to configure the text, font type, font size, and colors of windows and reports.

To upload graphics:

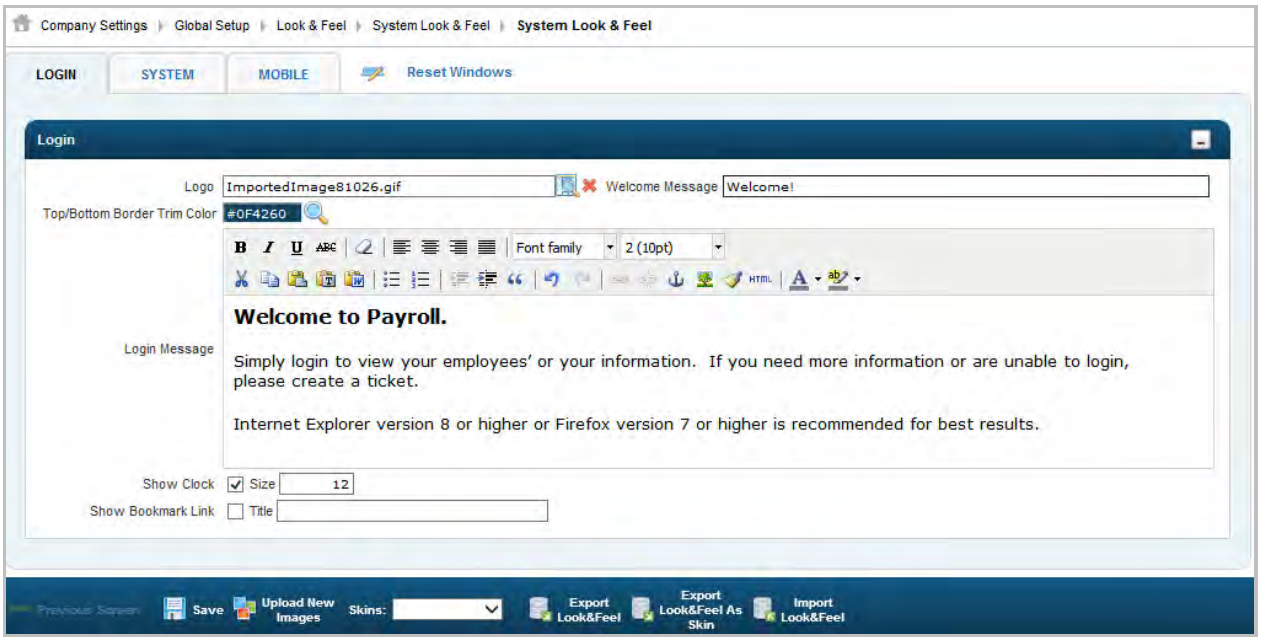
1. Select **Company Settings > Global Set-up > Look & Feel > Upload Images**.



2. Click the Browse... button, locate the file you want to upload and click Upload. The image you uploaded appears in the table. Files can be uploaded as GIF, JPEG, or PNG.

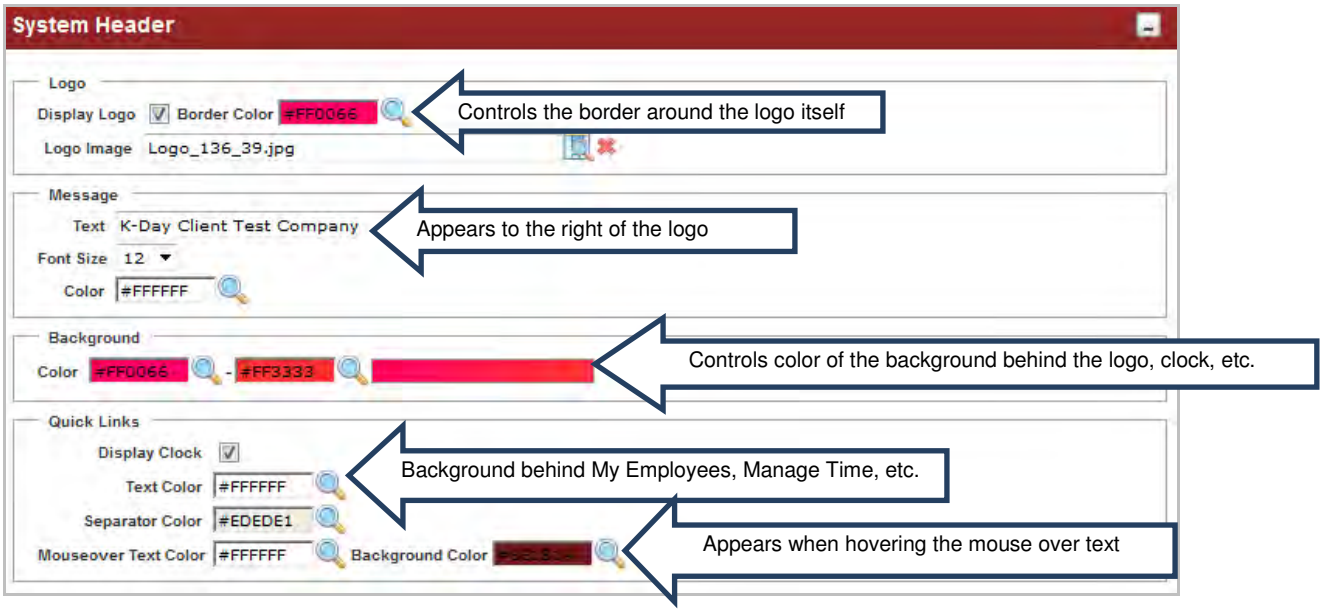
To format the logo area and background screens:

1. Select **Company Settings > Global Set-up > Look & Feel > System Look & Feel**.
2. The **System Look & Feel** screen will appear with three tabs: Login, System, and Mobile.
3. The **Login Tab** has the following options:



- In the **Logo** field, specify the image you want to appear in the background area of the Web Based Time & Labor Management login screen. Click the button to select from images that were uploaded.
- The Welcome Message will display within the Login box, and the TopBottom Border Trim Color will display on the top and bottom of the webpage.
- The **Login Message** can be configured to display whatever information the company would like to display to its users prior to logging in, with up to 1024 characters.
- A clock (with the current time based on the Company's Time Zone) can be selected to display, as well as a hyperlink with the option to Bookmark the URL.

4. Select the Save button.
5. The System Tab has the following options:
   - System Header, Menu, Floating Bar, System, Body, Reports, and Report Extra Settings. An example of the selections and what they control within the System Header can be seen below.



6. The **Mobile Tab** allows you to configure the look & feel a user will experience when accessing the system via a mobile device. A separate image, background color, and text color can be configured.
7. In the **System Header** window, in the **Logo** box, specify the logo image you want to appear in the top left corner of Web Based Time & Labor Management.
8. Click the Save button to save settings between Tabs, and the entire Look & Feel when done.

NOTE: You can also upload a new image from this screen by clicking on the Upload New Images button.

Additionally, a set Look & Feel can be exported from one company by clicking on the Export Look&Feel button (and saving the file), and imported into another by clicking on the Import Look&Feel button in the new company.

Setting up Profiles

Profiles are settings which are applied to user accounts that determine key aspects for the user such as: the type of timesheet, the security level, pay frequency, holiday schedule, work schedule, etc. Profiles provide a convenient way to apply many settings to user accounts. You can create Profiles for the following areas of the system:

- **Access** - specifies a single or range of IP addresses which a user is allowed to login or clock in from.
- **Benefit Accruals** - determines the rate at which the user accumulates vacation time, personal days, etc.
- **Days** - allows you to specify a block of days that can then be used to prevent employees from requesting off on those designated days.
- **Holiday Tables** - determines the user's holiday time off schedule.
- **Pay Periods** - determines the user's compensation schedule (i.e.: weekly, bi-weekly, monthly, etc.).
- **Pay Calculations** - determines the rules that are applied to raw hours; which are then used for payroll.
- **Pay Prep** - determines final summation of hours either by employee, pay category, shift, etc.
- **Punch Code Lookup Tables** - allows you to specify that punches coming in from a specific hardware device should be allocated to a cost center or multiple cost centers.
- **Schedules** - determines a user's daily or recurring schedule (i.e.: Monday 8-4, Tuesday 9-5, Wednesday 8:30 - 4:30, etc.).
- **Security** - determines the user's access privileges to system functions (i.e.: running reports).
- **Timesheet Auto Population** - determines how holidays and/or schedules are auto populated into timesheets.
- **Timesheets** - determines the manner in which a user will collect data (i.e.: clocking in and out, entering tips, etc.).

Access Profiles

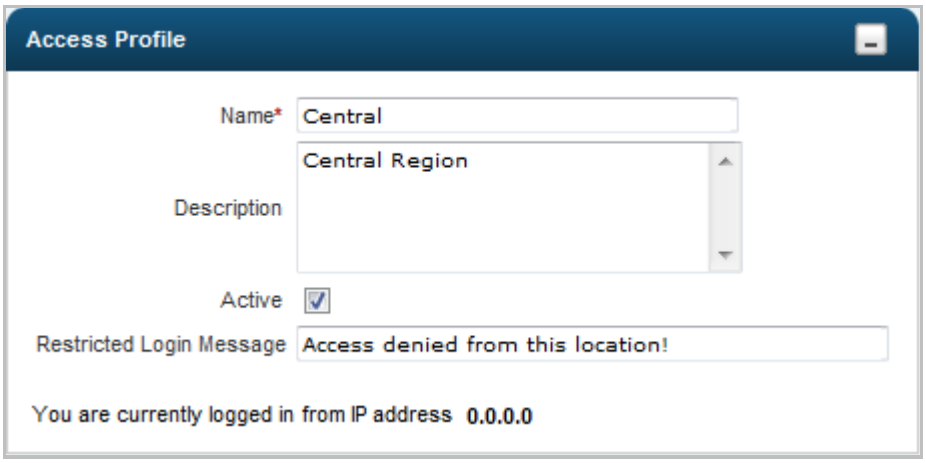
The Access Profile specifies a single or range of IP addresses which a user is allowed to login or clock in from. This profile can be assigned globally preventing all company employees from logging in, or to a timesheet profile that allows login privileges but prevents punching. This profile can also be assigned on a user-to-user basis.

To create an Access Profile:

1. Select **Company Settings > Profiles/Policies > Access**. The **Company Access Policies** screen will display.
2. Click on the

button to create a new policy.
3. In the **Edit Access Policy** screen, enter the **Name** and a **Description** for the access policy, and then click on the

button. You can also enter a **Restricted Login Message** that displays when logging or punching from restricted IP addresses.



4. Click on the

button. The **Add New Access Option** window will open. Specify a single IP address or a range of IP addresses and then click on the **Add** button. Repeat this process until all allowed IP addresses have been entered into the system.
5. Then, the **Access Profile** can be assigned to a user, a timesheet profile, or a security profile.

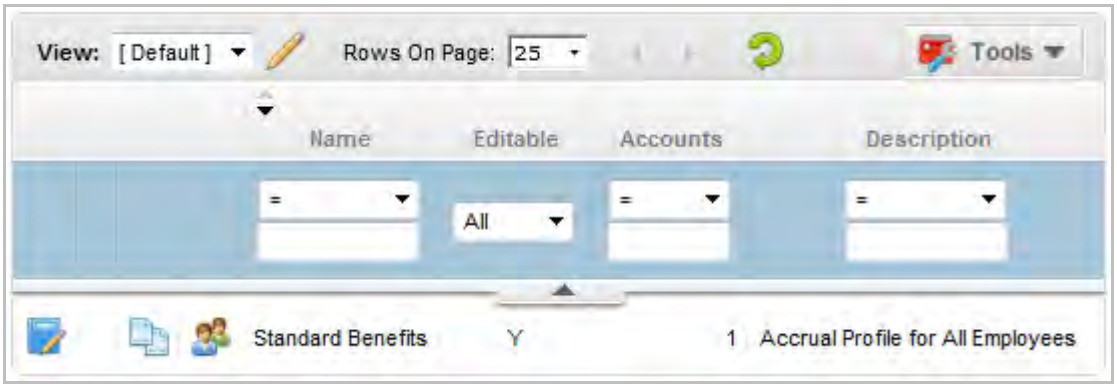
Benefit Accrual Profiles

The Benefit Accrual Profile applied to a user account determines the rate in which the user accrues benefit time. You can create any number of Benefit Accrual Profiles to reflect the different benefit accrual policies used within your organization. Example: if your full-time and part-time users accrue benefit time at different rates, you would create two different Benefit Accrual Profiles (one for the full-time users and one for the part-time users) and apply them to the user accounts accordingly.

NOTE: The Benefit Accrual module is optional component of Web Based Time & Labor Management. If your company is not using Web Based Time & Labor Management to track benefit time, this module will not appear under the **Profiles/Policies** menu. If you are interested in adding this module to your Web Based Time & Labor Management account, contact your Web Based Time & Labor Management representative.

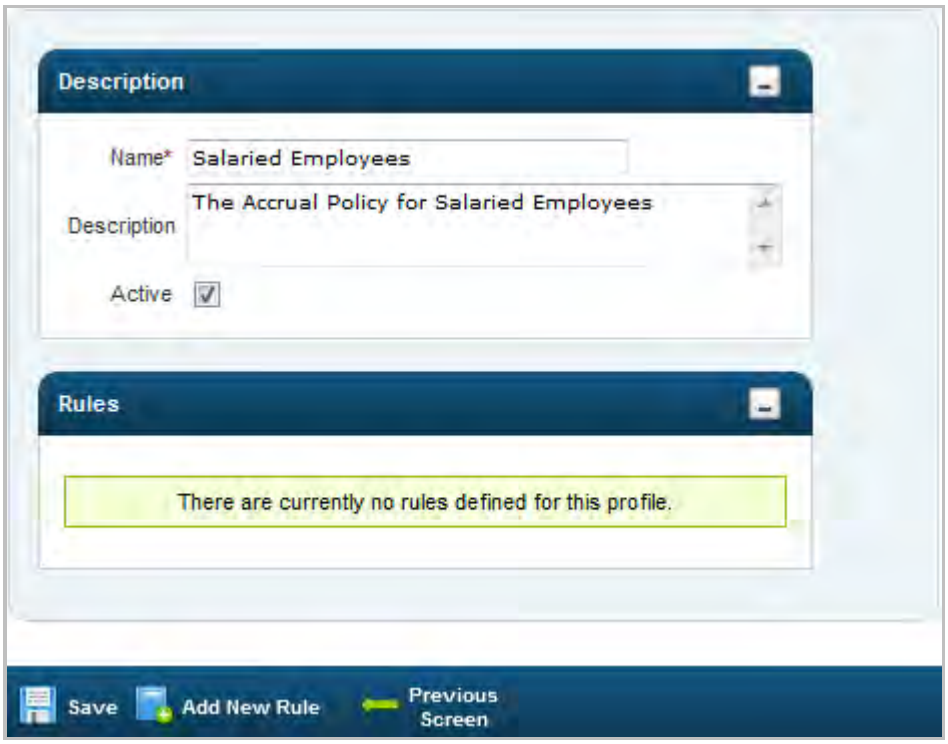
To create a Benefit Accrual Profile:

1. Select **Company Settings > Profiles/Policies > Benefit Accruals.**



2. Click on the

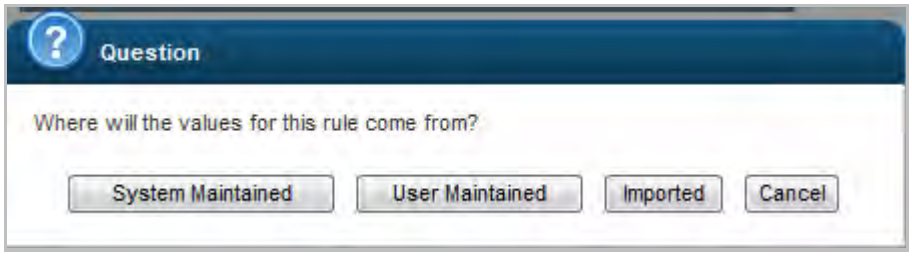
button.
3. Enter a profile name and brief description for the Benefit Accrual Profile you are creating.



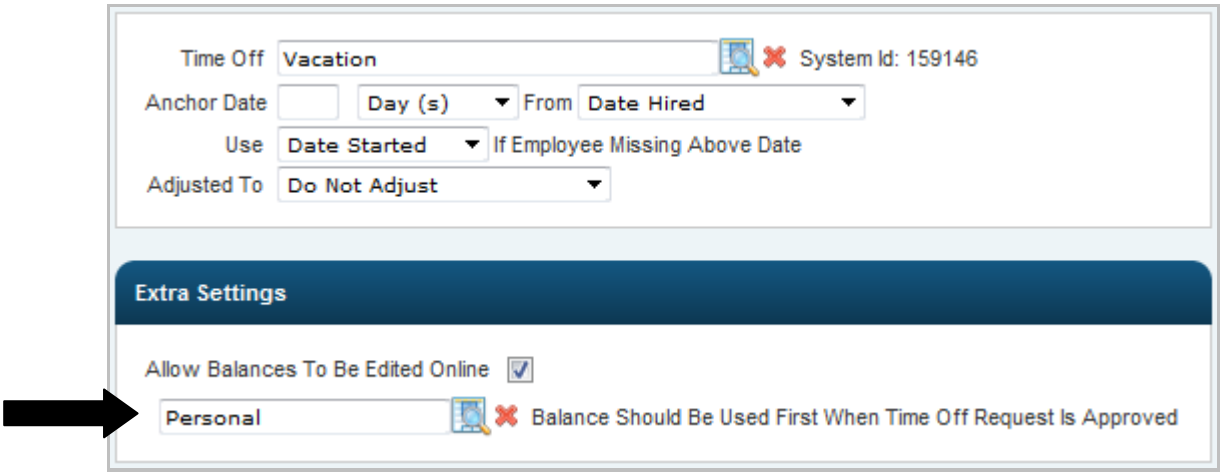
4. Click the

button. The new profile must be saved before rules can be added to it.
5. Click the

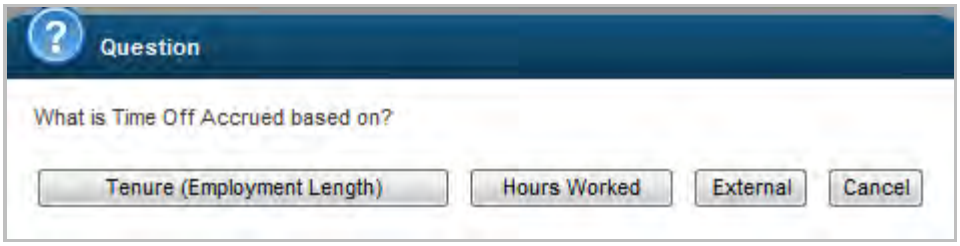
button to add a new rule to the **Benefit Accrual Profile**. You will have to add a rule for each type of accrued time off (i.e. vacation, personal, sick) under this Benefit Accrual Profile.



6. Define where the values for this rule will come from: **System Maintained** (i.e. the system will automatically calculate the accruals), **User Maintained** (i.e. the accrual balances will be manually updated by the System Administrator) or **Imported** (i.e. the accrual balances will be calculated externally and imported into the system on a regular basis).
   - If you chose **User Maintained** or **Imported**, you will need to specify the time off category and the anchor date.
   - You can also force an employee to use a specific time off category first when requesting time off

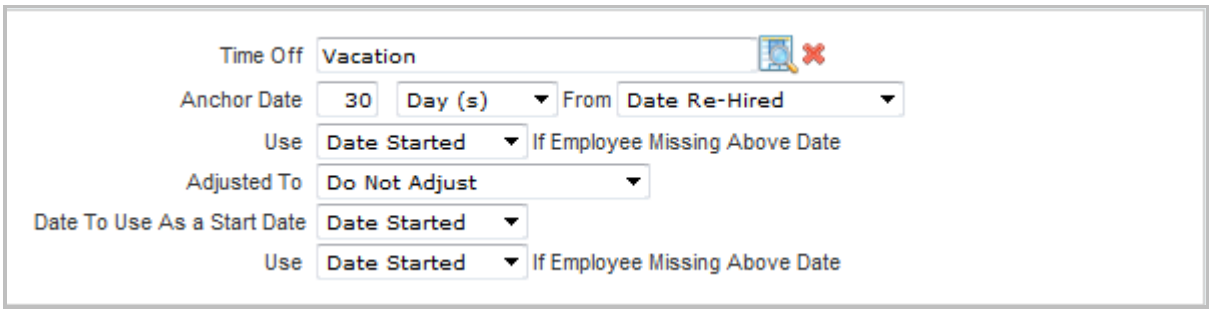


   - If you chose **System Maintained**, next define what the time off accrual is based on: **Tenure** (employment length) or **Hours Worked**.



7. The **Benefit Accruals Rules Edit** screen will now display. This screen is used to specify the settings for the rule you are adding to this profile. When finished defining the rule, click the **Save** button.

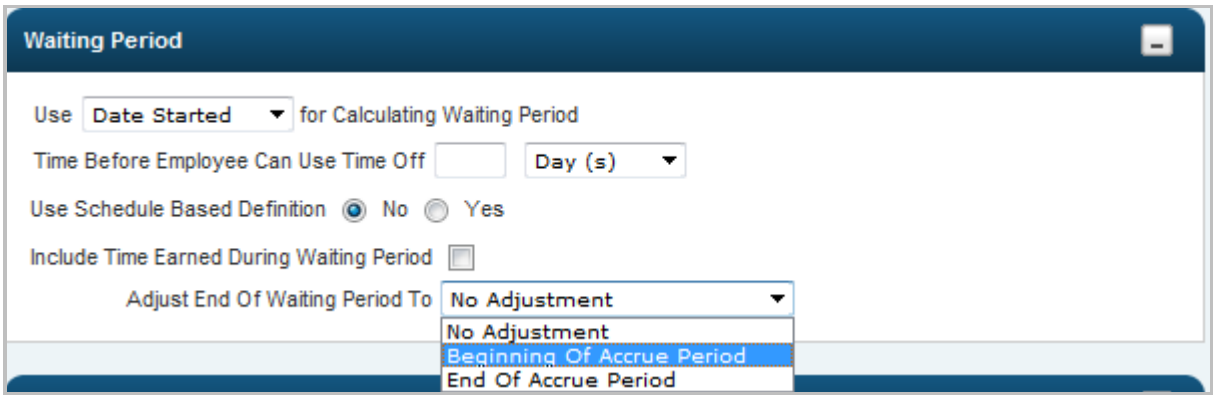
Tenure Table



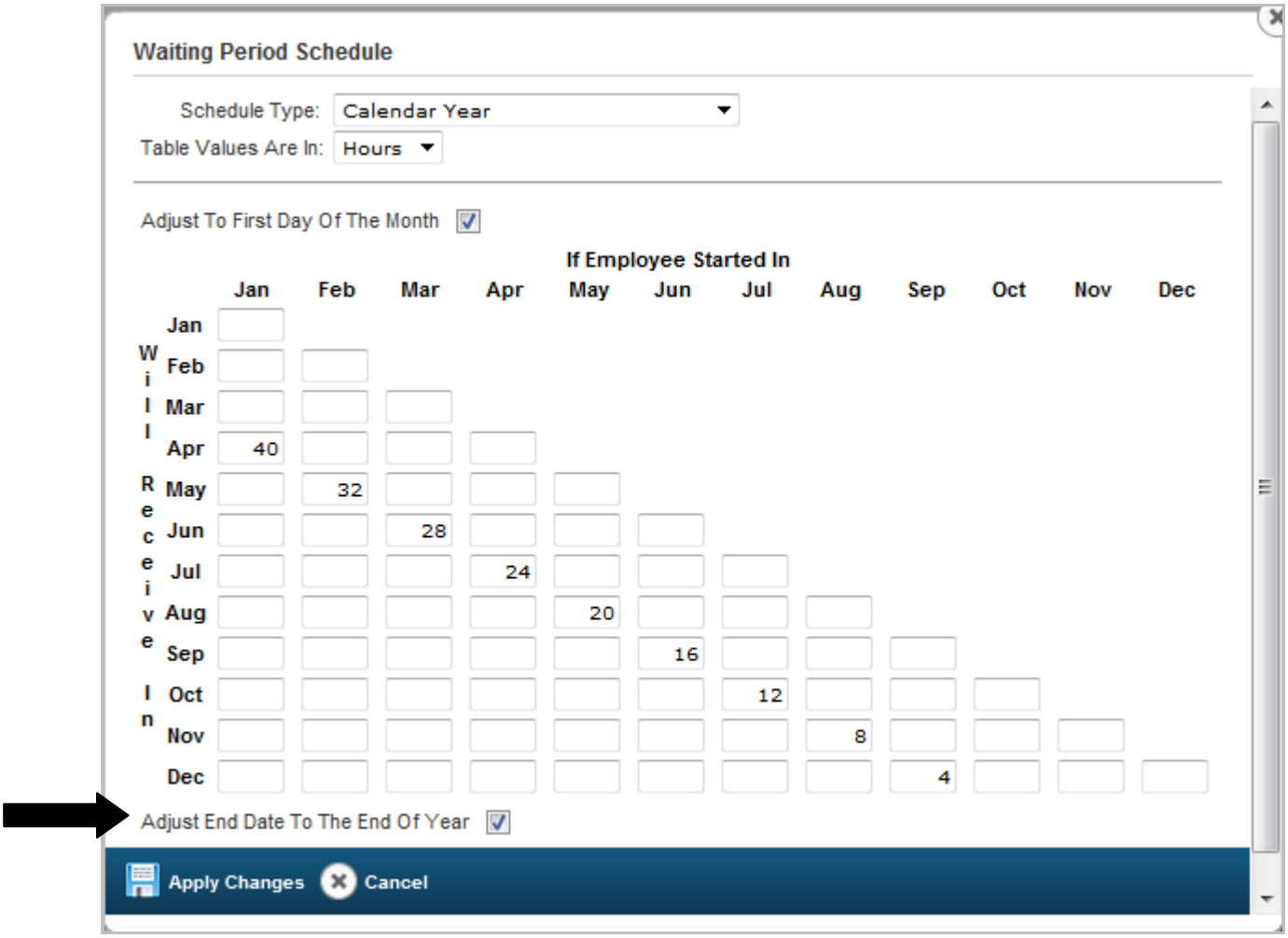
- **Time Off -** select the Time Off category associated with the rule you are creating by clicking on the button (i.e. if you are creating a rule for how a user accrues vacation time, you would select **Vacation** here).
- **Anchor Date -** the date in which your accrual schedule is based and when your new accrual year starts.

- **Use –** allows you to specify which date should be used for accrual purposes if the date you specify in the Anchor Date is not present.
- **Adjust To –** provides the option to further adjust the Anchor Date.
- **Date To Use As A Start Date** - the date in which the system should use an employee's start date for accrual calculation.
- **Use –** allows you to specify a different field to pull from if the employee is missing the designated date to use as start date.

Waiting Period

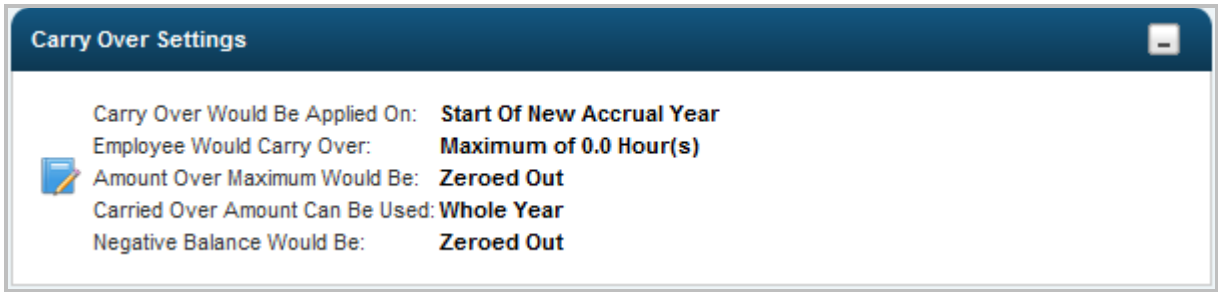


- **Use (Blank) for Calculating Waiting Period -** date to be used to start the waiting period.
- **Time Before Employee Can Use Time Off -** amount of time an employee must wait before they will begin accruing.
- **Use Schedule Based Definition -** if yes is selected, allows you to define a schedule of how an employee will accrue during their first year to two years of employment. In the example below, a user hired in January will receive 40 hours in the April following their hire date and a user hired in September will receive 4 hours in the December following their hire date.
- **Include Time Earned During Waiting Period** – allows employees to accrue during their waiting period, but are not eligible to use it until outside that period.
- **Adjust End of Waiting Period To –** specifies when the waiting period should end



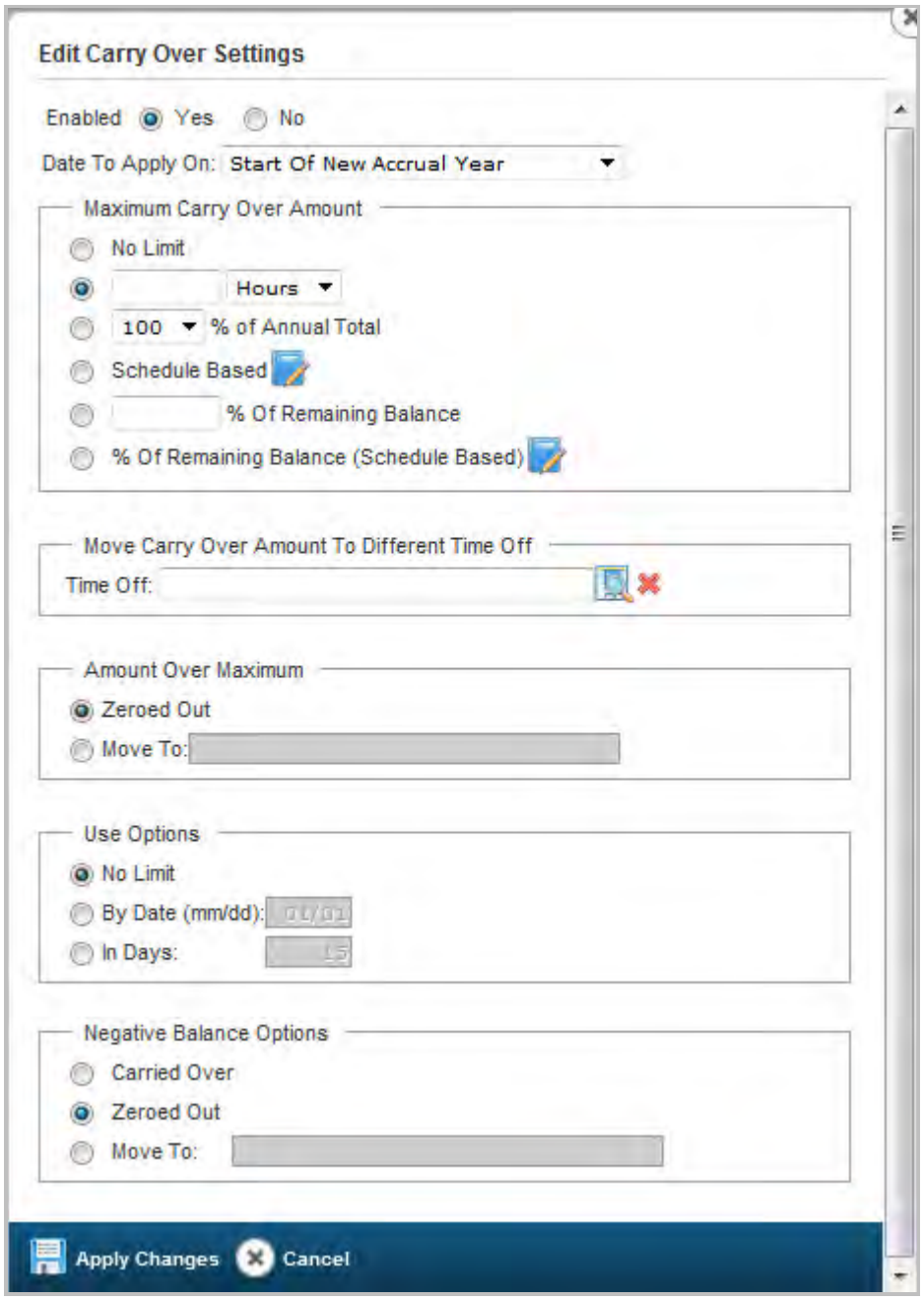
- **Adjust To First Day of A Month –** forces the accrual within the waiting period schedule to apply on the first day of the month. For example, if I'm hired on January 15th, I would accrue on April 1st, rather than April 15th.
- **Adjust End Date To The End Of Year –** forces the accrual within the waiting period schedule to adjust to the end of the year for that waiting period.
- **Include Time Earned During Waiting Period -** enables the employee to earn accruals while they are in the waiting period.

Carry Over Settings



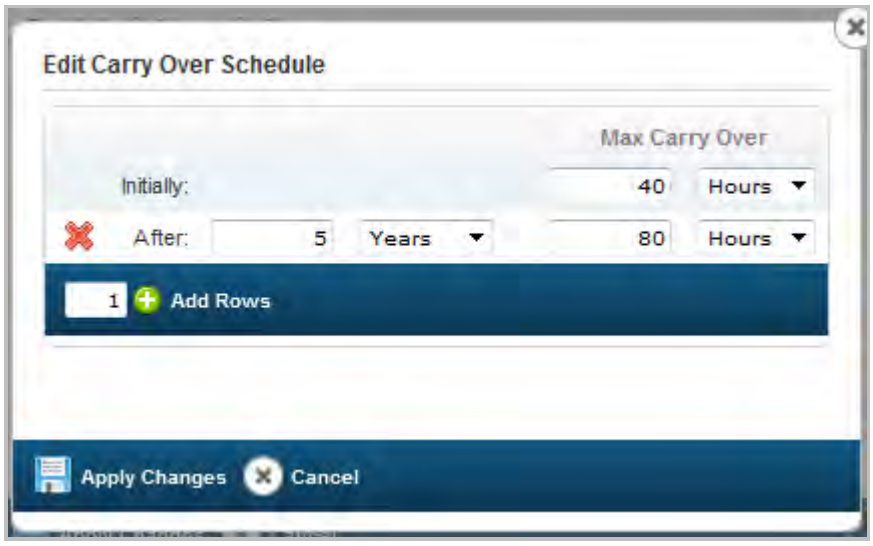
- **Carry Over Would Be Applied On -** specifies the date in which carry over will occur.
- **Employee Would Carry Over -** the number of hours an employee would carry over.
- **Amount Over Maximum Would Be -** specifies what should happen with the amount over the maximum carry over.

- **Carried Over Amount Can Be Used -** specifies the time frame in which an employee can use their carried over balance.
- **Negative Balance Would Be -** specifies what should happen to a negative accrual balance.



- **Enabled -** enables carryover.
- **Date to Apply On -** specify when carry over should occur
  a. **Calendar Day** - specific calendar day.
  b. **Start of New Accrual Year -** carry over will then go by the Anchor Date specified above.
  c. **Beginning of Last Accrue Period** - carry over is applied at the beginning of the previous accrue period.
  d. **Every Accrue Period** - carry over is applied after every accrue period.
- **Maximum Carry Over Amount -** the amount being carried over.
  a. **No Limit** - all balances will be carried over.
  b. **[Blank] Hours/Days** - allows you to specify the number of hours being carried over.
  c. **[Blank] % Of Annual Total** - allows you to specify a percentage of a user's accrued balance should be carried over.

d. **Schedule Based** - allows you to specify carry over based on tenure. In the example below, a user can initially carry over 40 hours, but after 5 years of employment, they can carry over 80 hours.

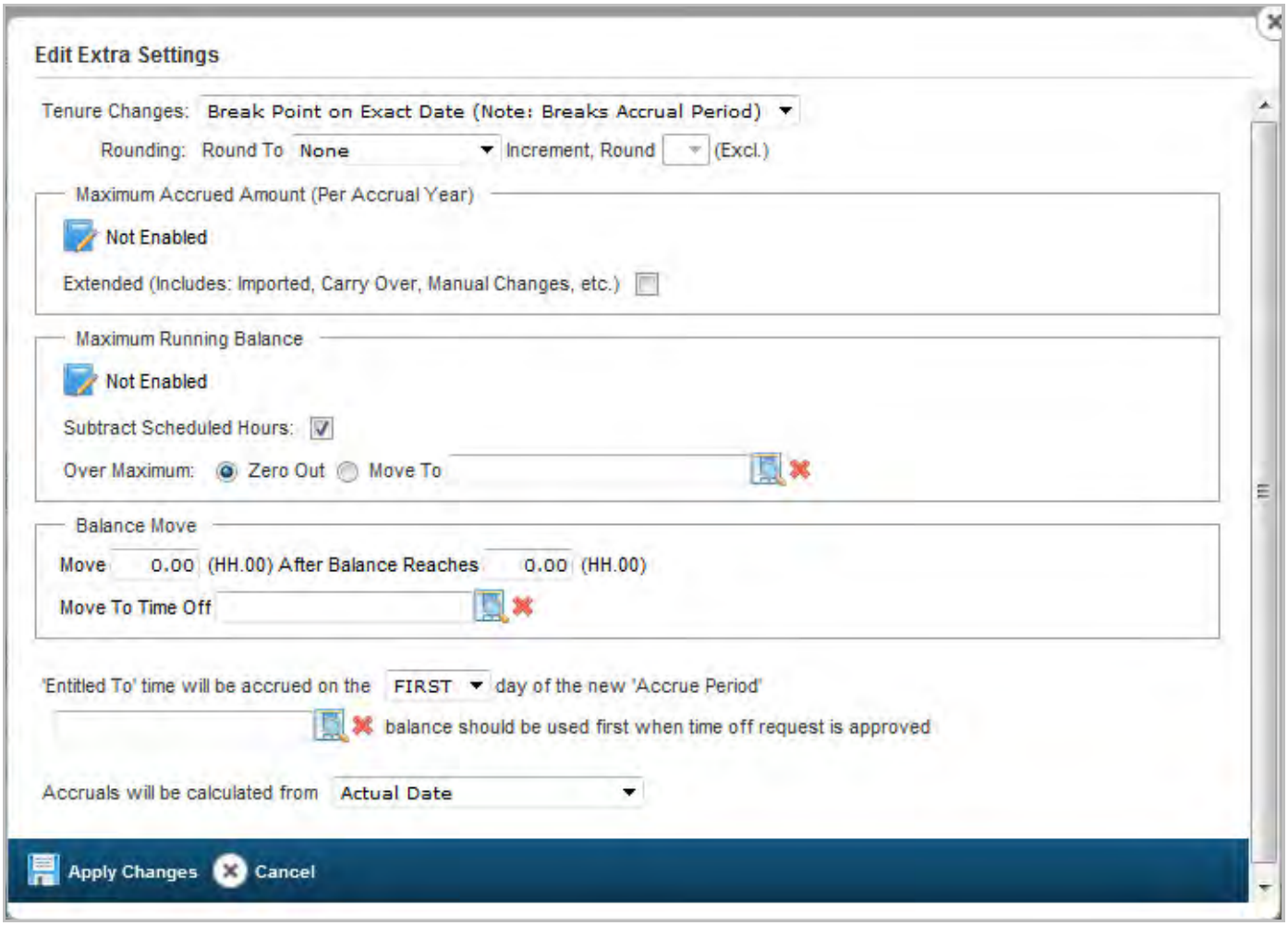


e. **% of Remaining Balance -** allows you to carry over a specific percentage of the employee's remaining balance.

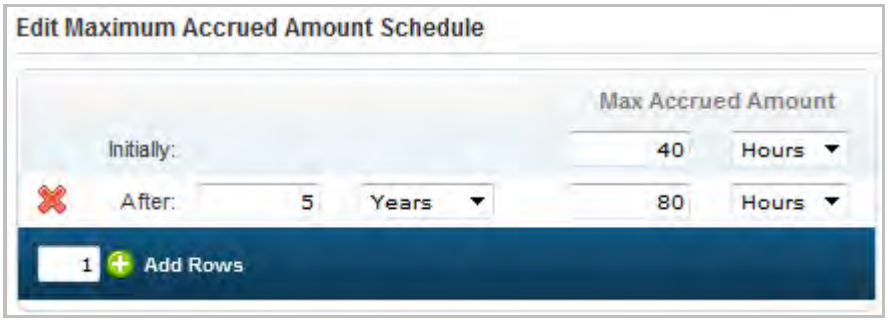
- **Move Carry Over Amount To Different Time Off -** allows you to move carried over amount to a different Time Off Category.
- **Amount Over Maximum** - specifies what to do with a balance that exceeds maximum carry over. It can be zeroed out or moved to a different Time Off Category.
- **Use Options -** if benefit time carried over within this Time Off, you can specify that the balance must be used within a certain time frame. Please note, if you are using any of the options below, you must clear out the employee's accrual balances on that date under **My Employees > Accruals > Use by Balances**.
  a. **No Limit** - all balances can be used within an unlimited time frame.
  b. **By Date -** specifies the date in which the balance must be used by.
  c. **In Days -** specifies the number of days in which the balance must be used by.
- **Negative Balance Options -** specifies what to do with negative accrual balances. You can choose to them to be carried over, zeroed out or moved to another Time Off Category.

Extra Settings

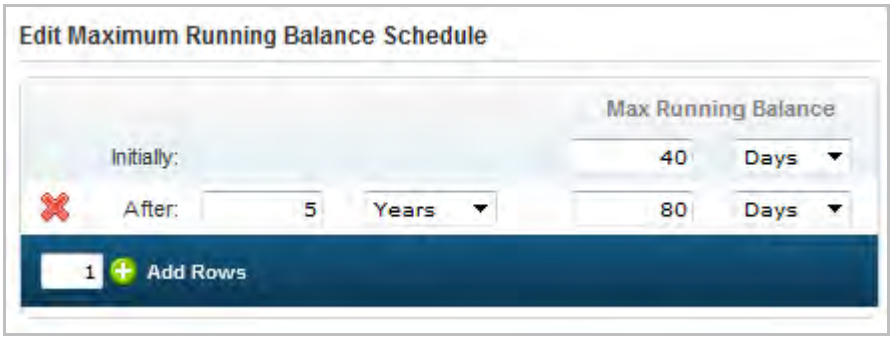
- **Extra Settings** allow you to define miscellaneous rules relating to tenure changes, maximum balances and rounding.
- Click the button to edit **Extra Settings**.



- **Tenure Changes** - if tenure changes in the middle of an accrual period, you have the following options:
  a. **Remains (At The Beginning Of The Next Accrual Period) -** will update the employee's accrue rate at the beginning of the **next accrue period**. For example, if the client accrued per pay period, and the employee's anniversary happened in the middle of the pay period, the employee's accrue rate would **remain** the same until the beginning of the next pay period.
  b. **Break Point (On Exact Date (Note: Breaks Accrual Period)) -** will **pro-rate** the employee's accrual rate based on when their tenure changed. For example, if the client accrued per pay period, and the employee's anniversary date happened in the middle of the pay period, the system would accrue the first half of the pay period at the employee's old rate and the second half of the pay period at the employee's new rate.
  c. **Next (At The Beginning Of Current Accrual Period)** - will update the employee's accrue rate at the beginning of the **current accrue period**. For example, if the client accrued per pay period, and the employee's anniversary happened in the middle of the pay period, the system would bump up to their **next** accrue rate at the beginning of that current pay period.
  d. **At The Beginning Of Current Accrual Year** – will update the employee's accrue rate at the beginning of the **current accrual year**. For example, if the anchor date of the accrual policy was 1/1, and the employee's anniversary date was 6/1/11, the employee's accrue rate would be bumped up on 1/1/11.
  e. **At The Beginning Of The Next Accrual Year** - will update the employee's accrue rate at the beginning of the **next accrual year**. For example, if the anchor date of the accrual policy was 1/1, and the employee's anniversary date was 6/1/11, the employee's accrue rate would be bumped up on 1/1/12.
- **Rounding** - Allows you to round the employee's Accrual Balances to the specified amount
- **Maximum Accrued Amount (Per Accrual Year) -** Allows you to define the maximum hours that can be accrued based on tenure, with the ability to include Imported, Carry Over, Manual Changes, etc. to that amount.



- **Maximum Running Balance -** allows you to define the maximum balance that an employee can have at any given time.

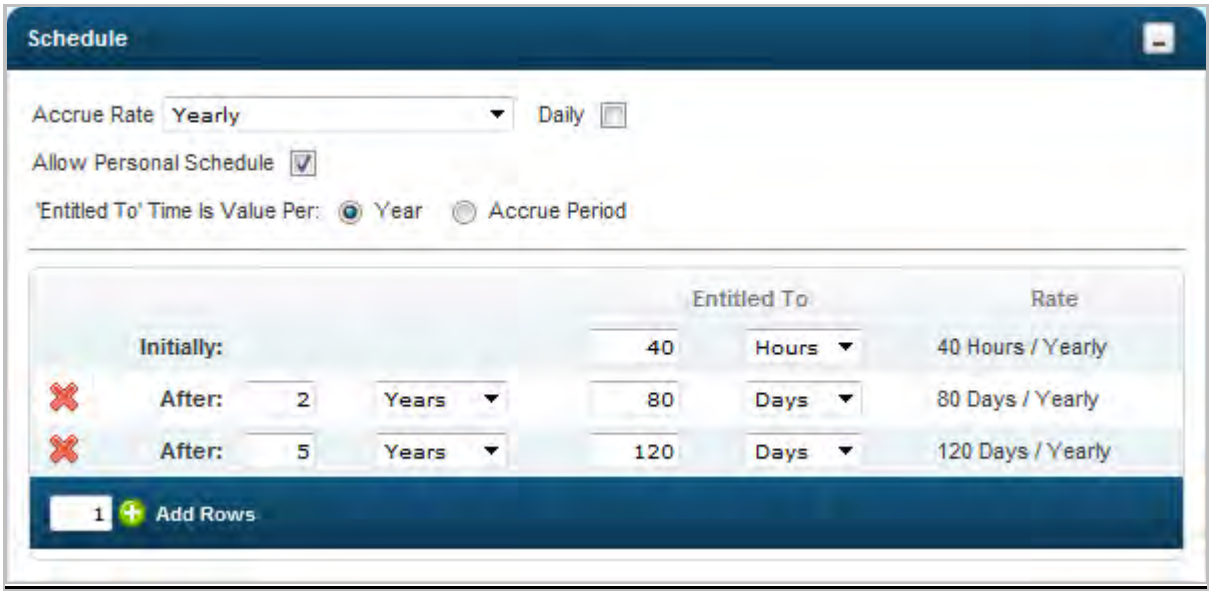


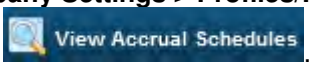
  a. **Subtract Scheduled Hours** - allows you to specify whether or not scheduled time off should be subtracted from an employee's balance.
  b. **Over Maximum** - allows you to define what should happen to the amount over the maximum running balance. It can be zeroed out or moved to a different Time Off Category.

- **Balance Move -** allows you to move any excess accrued amounts to a specific bucket.
- **'Entitled To' time will be accrued on a [First/Last] day of the new 'Accrue Period'** - allows you to specify when accrual should take place, at the beginning or end of the accrual period. For example, if you accrue monthly should you accrue on the first day of the month or the last day of the month?
- **[Blank] balance should be used first when time off request is approved** - Example: Within my Sick policy, a user can specify that when Sick is requested, PTO should be used first if there is a balance in that category.
- **Accruals will be calculated up to [Termination Date/Accrual Year End] for terminated employees -** allows you to specify what should happen to a terminated employee's accruals. Enabling **Termination Date** would mean that the employee stopped accruing as of that date, or enabling **Accrual Year End** would mean that accruals would continue to end of accrual year upon termination.
- **Accruals will be calculated from [Actual Date/Current Accrue Period Start/Next Accrue Period Start]** - allows you to specify what should happen to an employee hired in the middle of an accrual period, for their first accrual. For example, an employee is hired 11/15/07 and accrues monthly, should their first accrual count from 11/15/07, 11/1/07 or 11/30/07.

Schedule

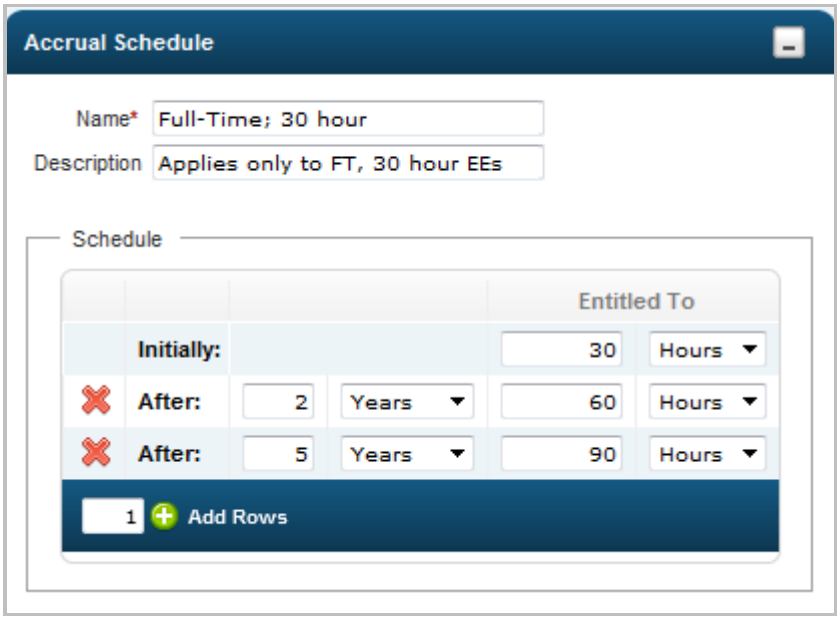
The Schedule allows you to specify schedule by which an employee would accrue after Waiting Period settings have taken place.



- **Accrue Rate** - how often the employee will accrue. In the example above, the employee would accrue yearly.
- **Daily** - if enabled, the system will calculate number of days per month, and accrual will be based on accrue periods. For example, an employee accrues 12 days per year total, on a monthly basis. However, since some months have fewer days than others, the rate at which the employee accrues will be different, but still total 12 days at the end of the accrual year.
- **Allow Personal Schedule** - allows you to have one Benefit Accrual Profile configured, but multiple Personal Schedules, eliminating the need to configure multiple Benefit Accrual profiles.
  a. First click on the check box to enable this feature.
  b. Next, under the Benefit Accruals Profiles (**Company Settings > Profiles/Policies > Benefit Accruals**), click on the button to **View Accrual Schedules** 

.
  c. Then click on the **Add New Schedule button**

, fill out the information requested, add rows as needed, and then click on the **Save** button. The example below is setup for an employee who works 30 hours per week:



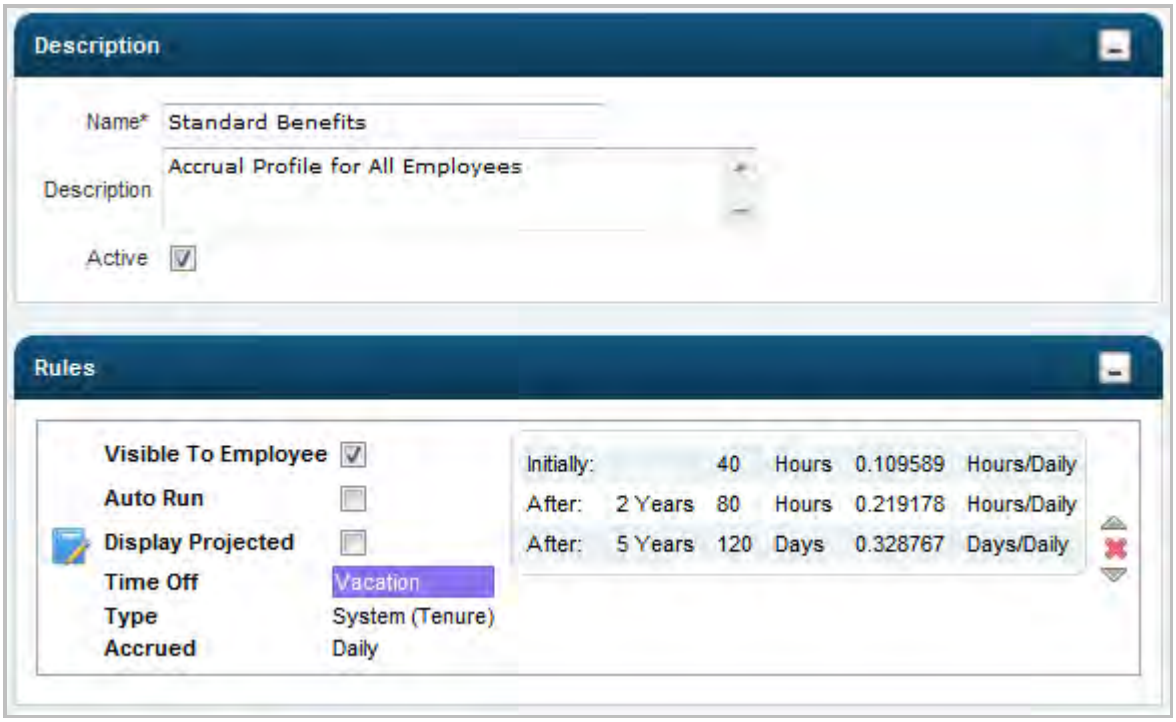
d. You can then assign the schedule to employees by going to **My Employees > Employee Information**

e. Click on the **Employee Information** button for the employee you would like to change.

f. Next go to the **Accrual Schedules** box and select the schedule you would like to use.

- **'Entitled To' Time Is Value Per: Year or Accrue Period -** Example: An employee accrues monthly, but receives 12 days total at the end of the accrual year. Choose Year to enter in 12 days, or choose Accrue Period to enter in 1 day. By choosing Year, the system will calculate the rate for you.
- The Schedule can then be filled in accordingly. On the **Initially** line, you will specify what the employee should accrue after the Waiting Period accruals have taken place. You can then specify what should happen each year following.
- Click the Add Rows button to add additional years to the schedule.
- Then click Save.

Once you have completed adding a rule to your **Benefit Accrual Profile**, you will see the following overview of the rule you have created. To make this rule allow employees to view their balances, click the **Visible to Employee** checkbox. To allow accruals to run automatically, click the **Auto Run** checkbox. **NOTE:** enabling Auto Run should only be done after balances have been uploaded and Updated To Dates have been set.



To setup accruals based on hours worked:

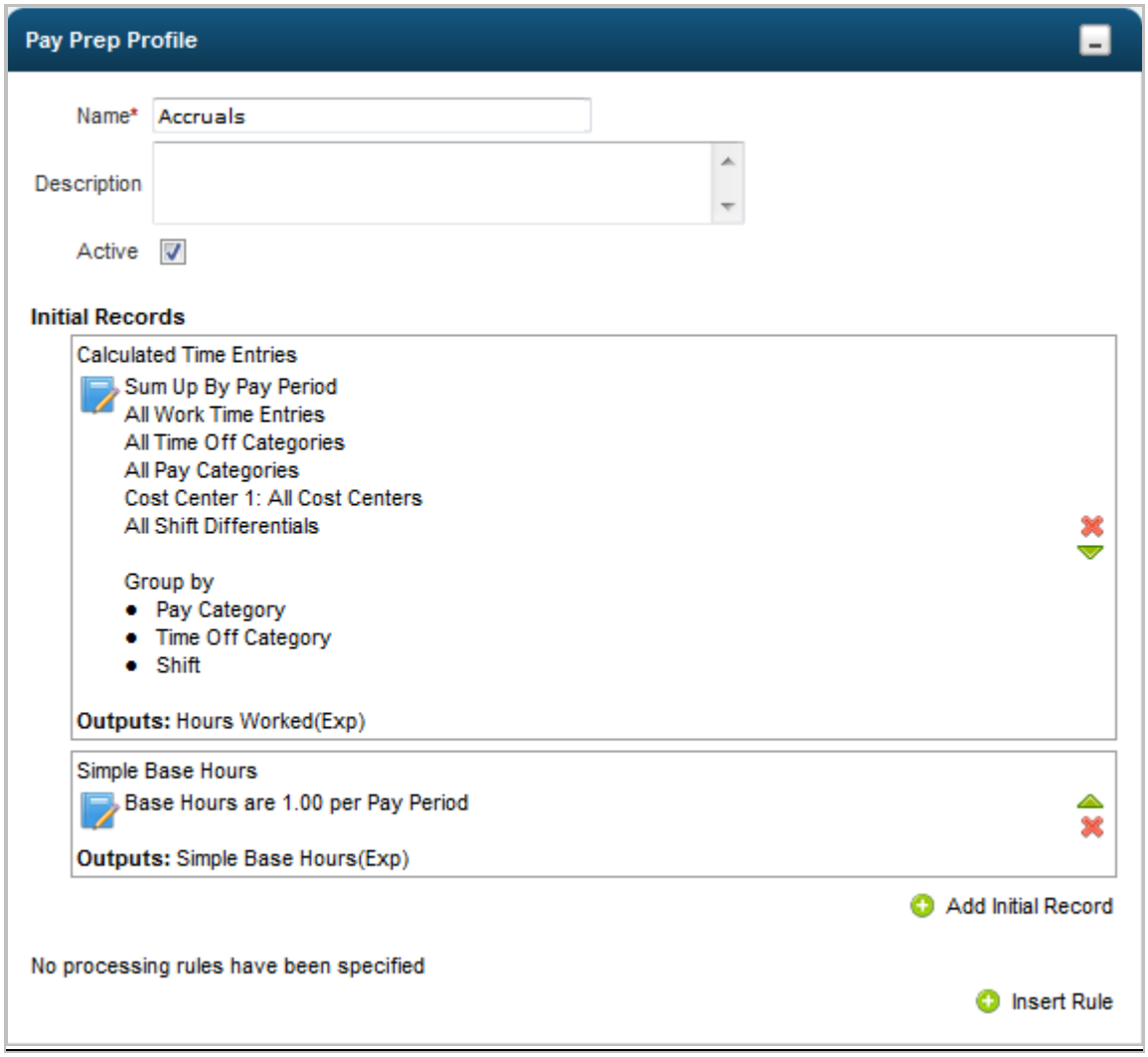
1. To setup accruals based on hours worked, the **Benefit Accrual** and **Pay Prep** Profiles will work together. **NOTE:** Please consult your Application Specialist when implementing such rules, as policies differ across companies.

2. First, go to **Company Settings > Profiles/Policies > Pay Prep.** You will create a profile that sums up **Calculated Time Entries** and defines **Base Hours** (for more details on the Pay Prep Profile, please see page 47).

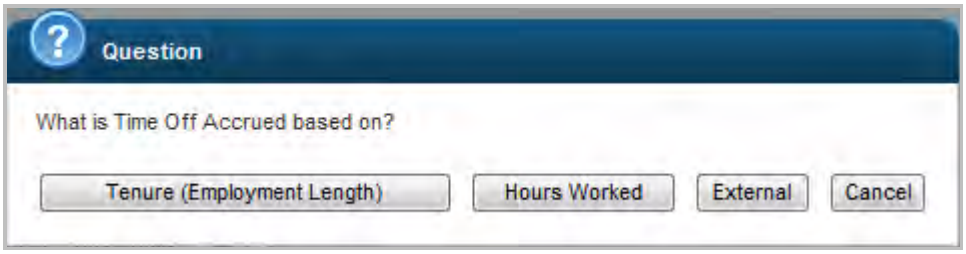
3. In the example below, time off hours and overtime, doubletime and UTO (unpaid time off) are not considered for the calculation of hours worked. We have named this record **Hours Worked**.

4. You will also need to enable the **Add Zero Records** checkbox within the **Calculated Time Entries** record, which will allow accruals to update even in the event the employee has not worked.

5. **Base Hours** allows you to define what your accrual is based off of. In the example below, our base hours are every 1-hour worked.

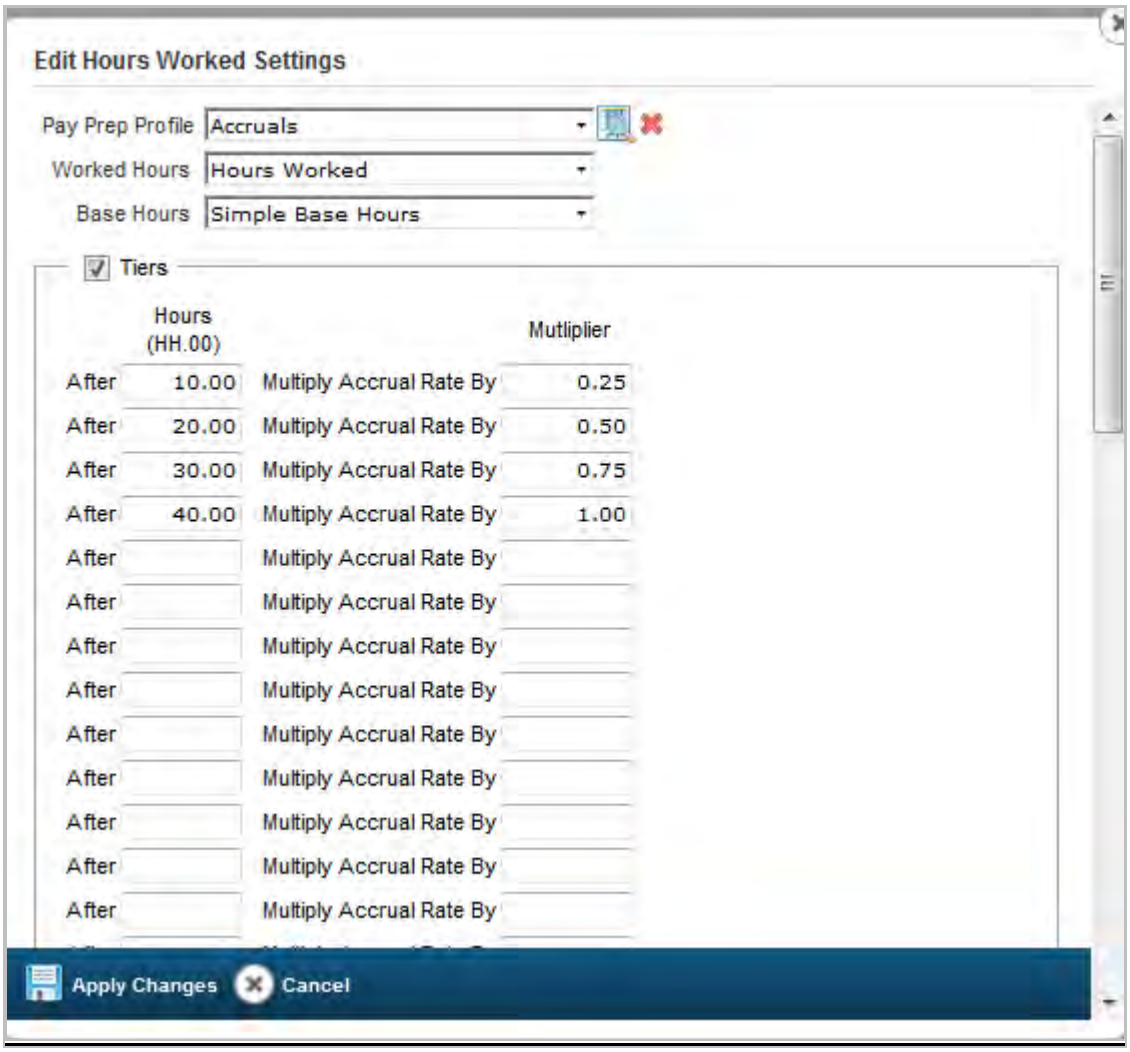


6. The records outputted from the Pay Prep profile will then be used for calculation in the Benefit Accruals Profile.
7. Go to **Company Settings > Profiles/Policies > Benefit Accruals**.
8. After you create a new profile, you'll be asked the following question. Select **Hours Worked**.

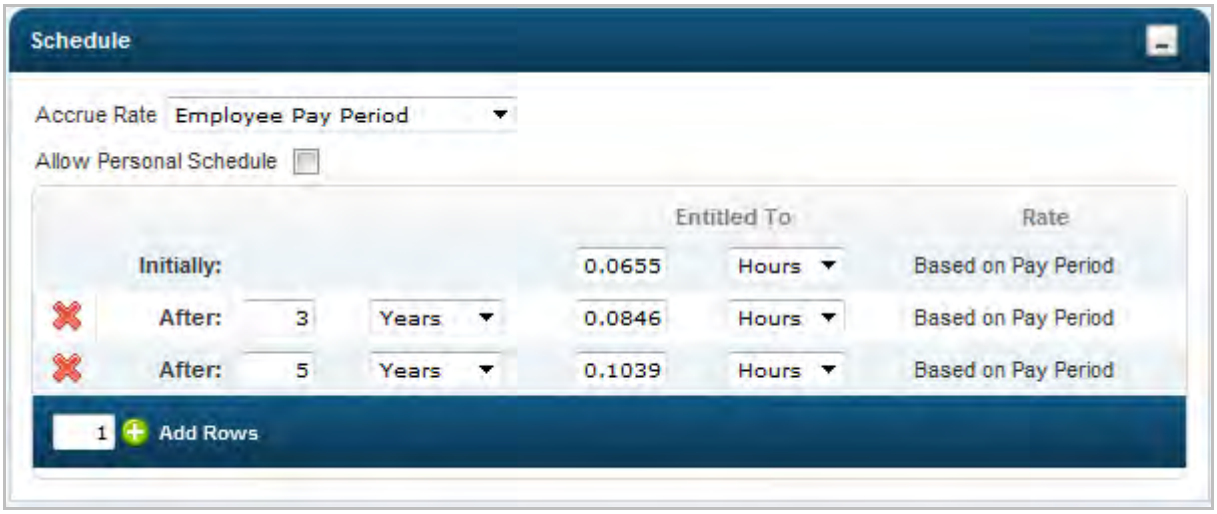


9. All settings will remain the same within this profile, with the exception of the following.

10. In the **Hours Worked Settings** window, click the button.



11. Select the **Pay Prep Profile** you had created for accruals by clicking on the button.
12. For **Worked Hours**, select the record you created which summed up your Calculated Time Entries.
13. You can also enable **Tiers**. For example, if the employee worked 40 or more hours, they should receive 100% of their accrual rate. But, if the employee worked 30-39 hours, they should accrue at 75% of their accrual rate.
14. Then, click Apply Changes.
15. Within the **Schedule** window, you can then specify the amount an employee accrues each pay period.



16. Then, click

.

NOTE: Accruals based on hours worked do **not** execute automatically, and must be manually run as part of processing payroll. This is because calculation of hours worked cannot be done until all hours are entered for the pay period and it has been approved.

Tips on Working with Benefit Accrual Profiles

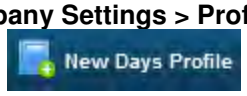
At some point you may need to modify or delete a Benefit Accrual Profile. Go to **Our Company > Profiles/Policies > Benefit Accruals.** When making changes to a Benefit Accrual Profile, please use the following guidelines:

- Before you modify a Benefit Accrual Profile, you might want to view the user accounts associated with it. Simply click the button next the Benefit Accrual Profile you want to modify.
- To **modify a Benefit Accrual Profile**, click the button next to the Benefit Accrual Profile you want to modify. To modify a rule, click its corresponding button. Remember to save your changes.
- To **delete a Benefit Accrual Profile** or rule, click the button next to the Benefit Accrual Profile or rule you want to delete. The system prompts you to confirm the deletion. Click **OK**. Note that you cannot delete any profile that has a user account associated to it.

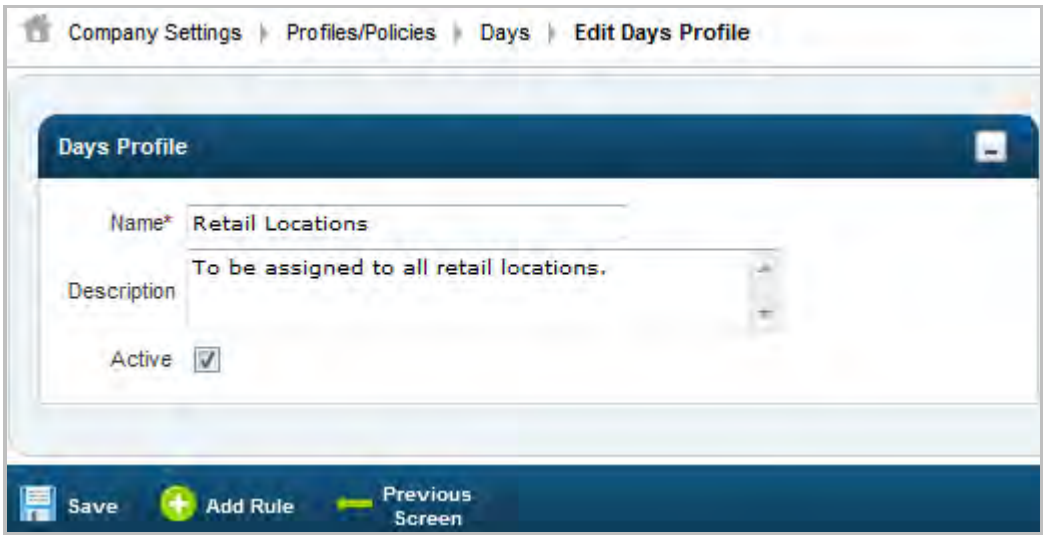
Days Profile

The Days Profile allows you to specify a block of days. The block of days can then be used to prevent employees from requesting off on those designated days (via Timesheet Profile) or calculate overtime on those days (via Pay Calculation Profile).

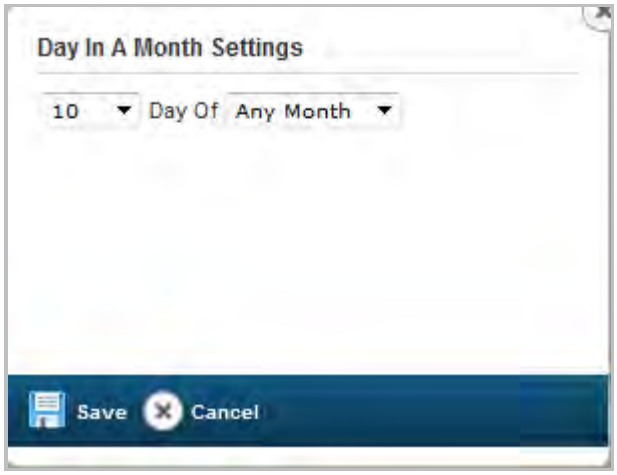
To create a Days Profile:

1. Go to **Company Settings > Profiles/Policies > Days**. The Company Days Profiles screen will display.
2. Click on the 

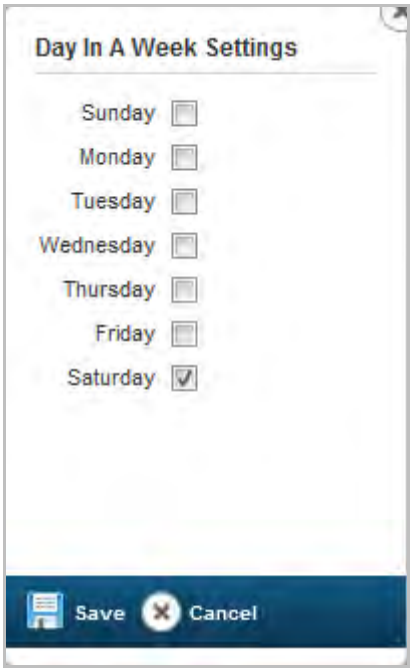
button.
3. Next, name your profile accordingly (for example, this profile may only apply to certain locations, departments, types of employees) and save.



4. Within the profile, click **Add Rule** to view the **Days Rules Lookup**. The following rules are available.

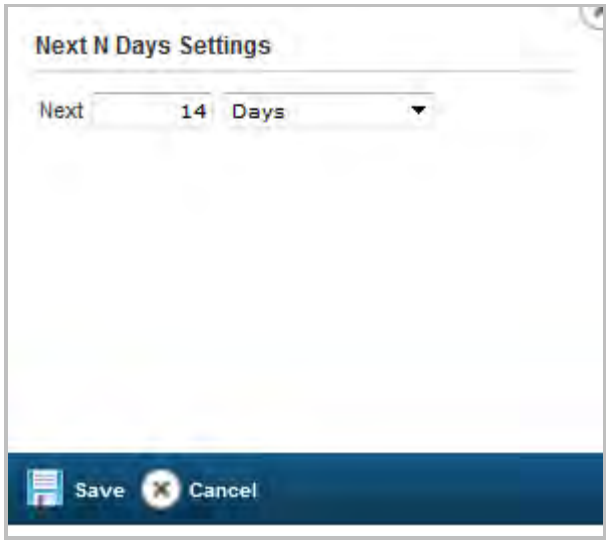


- **Days in a Month -** allows you to specify which day of the month should be blocked out. (Ex. The 10th of every month, as shown below.)

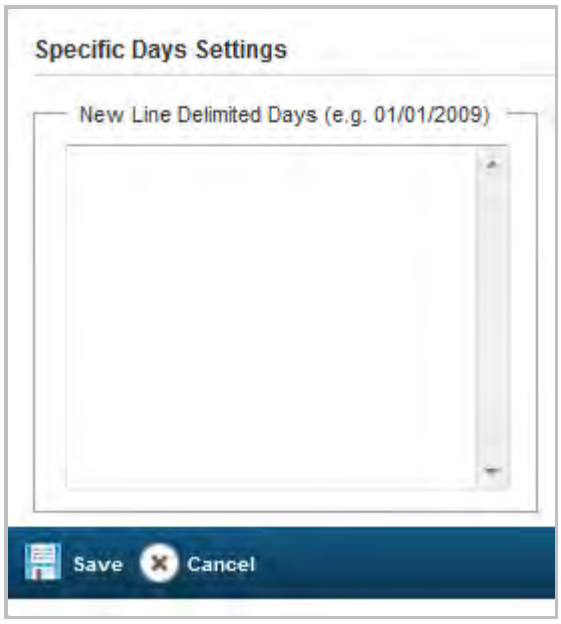


- **Days in a Week** allows you to name specific days in the week that should be blocked out. (Ex. Saturday)

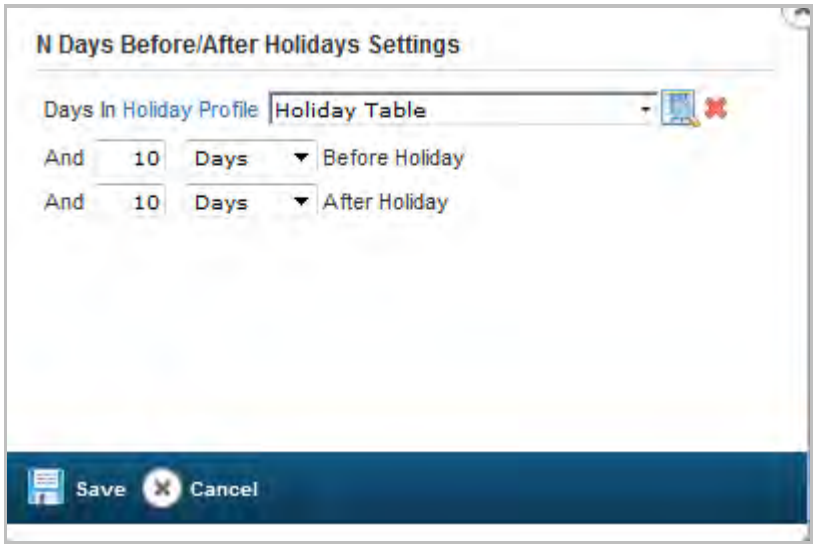
- **Month in a Year** allows you to name specific months that should be blocked out. (Ex. December)



- **Next N Days** allows you to restrict, from today, a certain number of days in the future. For example, an employee cannot request time off within the next 14 days.



- **Specific Days** allows you to name specific days that should be blocked out. (Ex. 11/23/07)

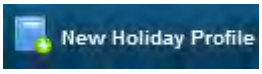


- **N Days Before/After Holiday** allows you to set-up a block of days surrounding a company Holiday.

Holiday Table Profiles

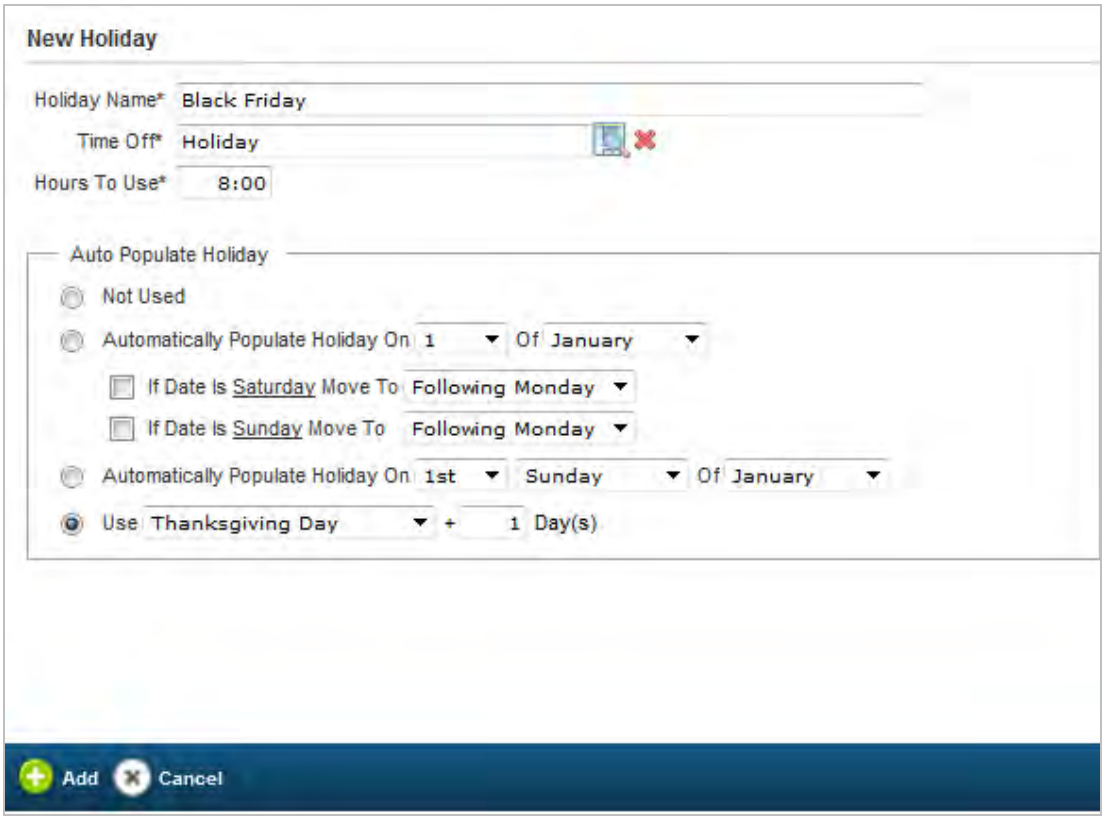
The Holiday Table Profile applied to a user account determines the user's holiday schedule. You can create any number of Holiday Table Profiles to reflect the different holiday schedules used within your organization. Example: if your full-time and part-time users were not eligible for the same holidays, you would create two different Holiday Table Profiles (one for the full-time users and one for the part-time users) and apply them to the user accounts accordingly.

To create a Holiday Table Profile:

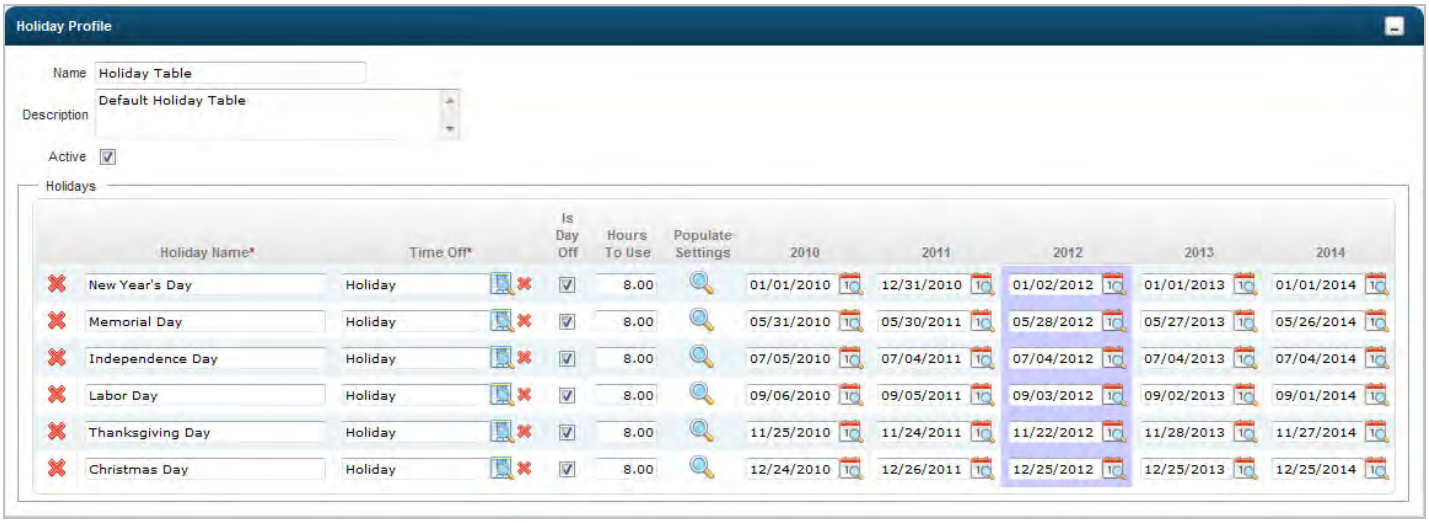
1. Go to **Company Settings > Profiles/Policies > Holiday Tables**. The **Company Holiday Profiles** screen will display. You will see a few Holidays already entered for you.
2. To add additional Holidays, click on the 

button.
3. Enter the Name and Description in the appropriate fields. Then, click the

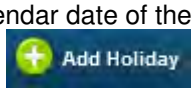
to bring up the Holiday Table Profile. The table below provides definitions for each field/setting.



- **Holiday Name** - name of the holiday you are adding to this Holiday Table Profile.
- **Time Off** - select the type of Time Off. Click the button for your list of Time Offs.
- **Hours to Use** - type in the amount of time allocated to the holiday.
- **Not Used** - select if you do not want this holiday to be automatically populated.
- **Automatically Populate Holiday On** - select if this holiday falls on the same date each year. Example: New Year's Day always falls on January 1.
- **If Date is Saturday** - if the holiday falls on a Saturday you can choose to move the day off to Friday or Monday, or to not have it populate.
- **If Date is Sunday** - if the holiday falls on a Sunday you can choose to move the day off to Friday or Monday, or to not have it populate.
- **Automatically Populate Holiday on** - select if a holiday always falls on a certain weekday within a month.
- **Use** – select if a holiday does not follow a typical cycle. Example: Black Friday is always the day after Thanksgiving, so utilizing the Thanksgiving Holiday already created in the Holiday Table, we can specify that Black Friday falls 1 day after the Thanksgiving Holiday.



- **Name -** name for the Holiday Table Profile.
- **Description -** brief description about the Holiday Table Profile.
- **Holiday Name -** the name of the Holiday.
- **Time Off -** the Time off category assigned to this holiday.
- **Is Day Off -** allows you to designate whether a holiday is a workday. For example, on New Year's Eve, you are scheduled to work for 4 hours, and are paid an additional 4 hours of holiday pay on that day. This setting would allow your schedule to populate on the holiday.
- **Hours to Use -** the amount of hours to be paid for the holiday.
- **Populate Settings** - view a read-only window of a particular holiday.
- **Date -** calendar date of the holiday in a particular year.

4. Then, click the 

button.
5. Click the

button.

Tips on Managing Holiday Table Profiles

At some point you may need to modify or delete a Holiday Profile. Go to **Our Company > Profiles/Policies > Holiday Tables** and use the following guidelines:

- Before you modify a Holiday Profile, you might want to view the user accounts associated with it. To do this, simply click the button next the Holiday Profile you want to modify.
- To **modify a Holiday Profile**, click the button next to the Holiday Profile you want to modify. Make your changes as desired and click the **Save** button.
- To **delete a Holiday Profile** click the button next to the Holiday Profile you want to delete. The system prompts you to confirm the deletion. Click **OK**. Note that you cannot delete any profile that has a user account associated to it.

Pay Period Profiles

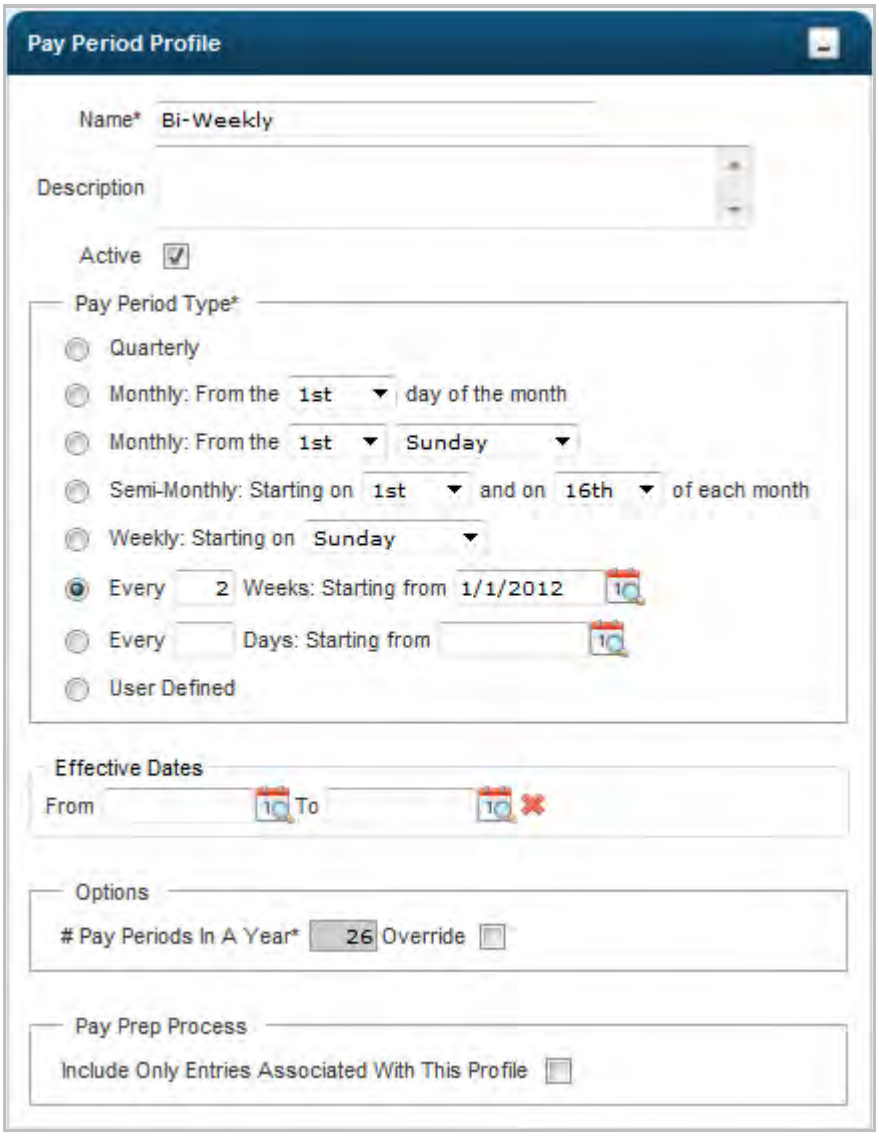
The Pay Period Profile applied to a user account determines the user's pay frequency. You can create any number of Pay Period Profiles to reflect the different pay frequencies used within your organization. Example: if your full-time and part-time users were paid on different pay frequencies, you would create two different Pay Period Profiles (one for the full-time users and one for the part-time users) and apply them to the user accounts accordingly.

To create a Pay Period Profile:

1. Go to **Company Settings > Profiles/Policies > Pay Periods**. The **Company Pay Period Profiles** screen will display.

2. Click on the

button and enter the appropriate information as described below.



- **Name -** name for the Pay Period Profile.
- **Description -** brief description about the Pay Period Profile.
- **Pay Period Type -** these settings specify the pay frequency of this Pay Period Profile. Select the appropriate radio button and enter any additional information if required.
  a. **Monthly, From The (blank) day of the Month -** starting date.
  b. **Monthly, From The (blank) (day of week) -** starting weekday of the month.
  c. **Semi-Monthly starting on (blank) and on (blank) of each month -** enter start dates for each block of time. Example: the 1st and 15th of each month.
  d. **Weekly, Starting on (blank) -** specify first day of the week.
  e. **Every (blank) Weeks, Starting From (blank) -** used for bi-weekly pay periods, as shown in the example above. The date entered should be the first day of your pay period, not your check date.
  f. **Every (blank) Days, Starting From (blank) -** pay period is created based on the number of days you define. Example: the pay period occurs every 20 days.
  g. **User Defined** – allows you to create a custom pay period with user defined date ranges.

- **Effective Dates -** the date that the pay period is effective from. You will only need to fill in the **To** if your pay period is changing. Otherwise, this field should be left blank, meaning this pay period will remain active indefinitely.
- **Include Only Entries Associated With This Profile -** allows entries associated with this pay period to be exported. This setting is utilized only when a user's pay period changes.
- **# Pay Periods In A Year ___ Override** – allows you to enter in the number of pay periods in the year based on your cycle. In the example above, we are creating a Bi-Weekly Pay Period which will have 24 pay periods yearly. This field is required.

Tips on Managing Pay Period Profiles

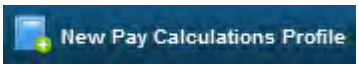
At some point you may need to modify or delete a Pay Period Profile. ***Before*** you modify a Pay Period Profile, please contact a www.entertimeonline.com representative so they can assist you in this process. ***Do not*** attempt to make this change on your own as the new pay period may not align with the existing pay period and thus cause duplicate timesheets to be created.

Pay Calculations Profile

The Pay Calculations Profile applied to a user account determines how the timesheet hours are calculated. You can create any number of Pay Calculations Profiles to reflect the different pay policies used within your organization. Example: if timesheet data belonging to full-time and part-time users were processed differently, you would create two different Pay Calculations Profiles (one for full-time users and one for part-time users) and apply them to the user accounts accordingly.

To create a Pay Calculations Profile:

a. Select **Company Settings > Profiles/Policies > Pay Calculations**. The **Company Pay Calculations Profiles** screen will display. This screen lists any Pay Calculations Profiles that have been created.

b. Click the 

button. The **Edit Pay Calculations Profile** screen will display. This screen is used to create the steps associated with the Pay Calculations Profile you are adding.

c. Enter a **Name** and **Description** for this Pay Calculations Profile you are adding. Example: you might be adding the Pay Calculations Profile for your full-time users, so you would call the profile *Full-Time.*

d. There are 2 rules automatically created within a Pay Calculations Profile. Those 2 rules are:
   1. **Default Time Entry Pay Category** - specifies the default Pay Category at which all hours are paid. Additional rules for overtime and shifts can be specified below.
   2. **Schedules are Not Enabled** - allows for the consideration of schedules when time is calculated.

e. Click on the (edit step) button pertaining to each of these 2 rules and specify their properties. Rules are executed in the order in which they appear within the Edit Pay Calculations Profile screen. Example: rounding rules will appear before overtime rules because rounding should occur before summing up your hours for overtime.

f. Click

when finished.

g. To add additional steps (rules) to this Pay Calculations Profile, you must first click on the

button. The **Pay Calculations Steps Lookup** screen will appear.

h. Rules are broken up into specific categories:
   - **Breaks and Lunch –** please sure the Identify Lunch and Breaks rule is enabled to allow the system to appropriately identify the various breaks in the day as either a break or lunch.
     a. Identify Lunch and Breaks - specifies category assigned to gaps of time. By default the system assumes that all gaps are breaks and this rule determines which of those gaps should be allocated towards lunch.
     b. Ignore Punched Out Breaks - adjusts in or out time of break to pay employee for that time.
     c. Find Punched Out Breaks - allocates punched out breaks to a specific pay category, shift, or time off category.

d. Credit Back Paid Break For Unpaid Lunch Time - automatically credits back unpaid time that should be paid. Example: An employee is entitled to 30 minutes of unpaid lunch and 15 minutes of paid break. If the employee chooses to take that time at once (clock out for 45 minutes) this rule will credit back 15 minutes to be paid.

e. Credit Extra Time for NOT Taking Lunch - automatically credits extra time when an employee does not take lunch.

f. Deduct Breaks - automatically deducts breaks based on configurable settings.

g. Deduct Lunch Time (Specific From-To Time) - automatically deducts lunches based on configurable time settings.

h. Round Total Time For Lunch Or Break - adjusts out punch or in punch for lunch to round total time. Example: if employee punches from 12:01PM to 1:02PM, in punch would round to 12:02.

i. Adjust Lunch In/Out Based on Schedule - rounds lunch based on scheduled time..

j. Deduct Scheduled Lunch Time (Specific From-To Time) - automatically deducts a scheduled lunch from and to time based on configurable settings.

k. Round Lunch to Scheduled Time – allows you to round an employee's out punch to lunch or punch in from lunch ensure the scheduled total time for lunch, as long as the punches are within ___ minutes.

l. Paid Break - specifies settings that determine how breaks are paid.

m. Paid Break v2 – specifies settings that determine how breaks are paid, and allows for multiple Paid Breaks to be applied as tiers.

- **Breaks and Lunch (v.2)**

a. Deduct Lunch - automatically deducts lunch based on configurable settings. This rule currently works in conjunction with our Exceptions module, allowing you to disable this rule applying if a certain Exception is set on the employee's timesheet. For further details, please review the section regarding Exceptions.

b. Paid Lunch - specifies settings that determine how lunches are paid.

- **Exceptions –** when using Exception rules, please ensure you have first setup Exceptions under **Company Settings > Time & Labor Setup > TLM List Definitions > Exceptions**. Also, Exceptions apply based on a schedule, so if the client is not using schedules, you'll need to enable the Enable Exceptions setting in the **Find Appropriate Schedule** rule in the Pay Calculation Profile (2nd rule from the top).

b. Exception Based on Advanced Filter - allows you to create an exception based on match criteria (such as cost center, time off, etc.

c. Exception Based on End Time - allows you to automatically flag an exception if an employee left late or early.

d. Exception Based on Holiday – allows you to automatically flag if an employee if they've worked within a specific time frame in regards to the Holiday (either by percentage or first in punch).

e. Exception Based on Hours Worked Per Shift – allows you to define an exception if an employee works more than or less than a certain number of hours.

f. Exception Based on Lunch – allows you to have the system automatically flag an employee's lunch time if they've taken more, or less than the designated lunch period, or no lunch at all.

g. Exception Based on Scheduled Shift Missed – allows you to automatically flag an employee that was scheduled to work and did not.

h. Exception Based on Start Time - allows you to automatically flag an employee that either came in late or early.

i. Exception Based on Worked Time – allows you to automatically flag an employee that has worked either more or less than their scheduled hours.

j. Exception Based on Time Between Two Shifts – allows you to automatically flag an employee that has more or less than a designated amount of time between worked shifts.

- **Extra Flat Pay**

a. Add Extra Flat Pay Per Day - adds extra dollar amount to employee's pay.

b. Add Extra Flat Pay Per Pay Period - adds extra dollar amount to employee's pay per pay period.

c. Add Extra Flat Pay Per Shift - adds extra dollar amount to employee's pay per shift.

d. Add Extra Flat Pay Per Week – adds extra dollar amount to employee's pay per week.

e. Guaranteed Minimum Hourly Pay Per Day – will look to the employee's hours, piecework, and extra pay to ensure that the employee is paid at least a minimum hourly rate (defined in the rule) on a daily basis. If the employee's hours, piecework, and extra pay do not equal at least the minimum hourly rate specified within the rule, the system will then add a flat extra pay entry to ensure the minimum is reached.

f. Guaranteed Minimum Hourly Pay Per Week – will look to the employee's hours, piecework, and extra pay to ensure that the employee is paid at least a minimum hourly rate (defined in the rule) on a weekly basis. If the employee's hours, piecework, and extra pay do not equal at least the minimum hourly rate specified within the rule, the system will then add a flat extra pay entry to ensure the minimum is reached.

- **Extra Time or Guaranteed Minimum Time**

a. Add Extra Hours Per Week (v.2) – adds extra hours to employee's timesheet if criteria are met.

b. Add Extra Time Based On Continuous Hours Worked – adds extra hours when an employee works a continuous amount of hours. Meaning, if an employee works multiple times within one day and meets the criteria for total hours within that day, they will receive additional hours.

c. Add Extra Time During Daylight Savings Time – adds a defined amount of hours during Daylight Savings Time if an employee works through the hour lost.

d. Add Extra Time Per Day (v.2) - adds extra hours to days on an employee's timesheet if criteria are met, including lunch/break penalty options. Also has the option to apply the extra time to a lunch or break and only count worked hours. Example: An employee is entitled to an extra 10 minutes to be added to their work day if they do not take a lunch or break during their work day. The rule can also be configured to take into account already taken or scheduled breaks and lunches, and add extra time based on scheduled lunch time and actual lunch time taken. This rule currently works in conjunction with our Exceptions module, allowing you to disable this rule applying if a certain Exception is set on the employee's timesheet. For further details, please review the section regarding Exceptions.

e. Add Extra Time Per Day Based on Spread of Hours – will add extra time to an employee's timesheet if they work, then leave, and then come back to work again within a designated number of hours from their last punch.

f. Add Extra Time Per Shift (v.2) – allows you to designate for either Spring or Fall Daylight Savings whether time should be added or subtracted from the employee's timesheet.

g. Add Extra Time Per Time Entry - will allow you to add a tiered amount of hours per time entry, when the employee's total time is between two amounts. Example: when an employee has a time entry that is between .01 and 2.0 hours, they will receive 2 extra hours for that time entry.

h. Add Extra Time With Multiplier – adds extra hours to an employee's timesheet based on certain criteria, with a multiplier and rounding attached to the hours.

i. Guaranteed Minimum Hours Per Day (v.2) - guarantees an employee a certain number of hours if they meet the criteria. Example: An employee who works on Saturday is guaranteed 4 hours of additional pay regardless of hours worked.

j. Guaranteed Minimum Hours Per Shift - guarantees an employee a certain number of hours if they meet the criteria. Example: An employee who works on Saturday from 8pm to 4am is guaranteed 2 hours of additional pay regardless of hours worked.

k. Guaranteed Minimum Hours Per Time Entry – guarantees an employee a certain number of hours if they have met a certain criteria for each time entry within a day.

l. Guaranteed Minimum Hours Per Week - guarantees an employee a certain number of hours if they have met a certain criteria. For example, an employee is guaranteed 40 hours a week if they work 36 hours that week.

- **Grace And Rounding**

a. Adjust In/Out Time Based on Schedule - adjusts in and out punches that are outside of scheduled time to the scheduled time.

b. Adjust Start or End Time with Multi Options - Allows you to enter in specific from and to times to be rounded. Example: 6:03am should round to 6:15am.

c. Allocate Late In/Early Out To Time Off - penalizes an employee for arriving late or leaving early, by taking away hours from a specific time off bucket.

d. Round All In/Out Time, Including Breaks and Lunches - Rounds all punches the same way regardless of in or out.

e. Round In/Out Time - adjusts time in and out and provides you with the ability to round in punches differently than out punches.

f. Round To Schedule Total - adjusts total time to assigned schedule total. Example: if an employee is assigned an 8 hour schedule, and works 7 hours and 56 minutes, the system would round their total to 8 hours.

g. Round Total Time (Per Entry) - adjusts out punch or in punch for each shift to round total time. Example: If an employee punches in at 8:01AM and out at 12:02PM, the out punch would be rounded to 12:01PM, so the total for the entry is a round number (4 hours).

h. Round Total Time (Per Week) – adjusts an employee's time to ensure the timesheet's total is rounded.

i. Round Total Time Per Day - adjusts out punch or in punch for day to round total time, with the ability to not round the first X minutes within the hour. Example: if an employee punches in at 8:01AM and out at 5:02PM, the out punch would be rounded to 5:01PM, so the total for the day is a round number (9 hours). You can also choose a decimal place for **Up After**, for example 3 min = 0.05 Hr.

- **Holiday Pay**

a. Calculate Holiday Pay As Average Hours Worked Prior - will allow you to define how auto-populated holiday hours should be paid, based on average hours worked in a specific period. Please note, this rule allows you to define a specific look back period to determine average hours worked. If any hours are changed within the look back period that are NOT part of the employee's current timesheet, the current timesheet will need to be recalculated in order to calculate the holiday appropriately.

b. Holiday Eligibility - specifies the different criteria an employee has to meet to be paid for a holiday. Example: an employee would need to be scheduled the day before the holiday, the day of, and the day after to be paid for the holiday. If the employee is eligible to receive holiday pay, you can override the pay category accordingly (regular, overtime, etc.). If the employee is not eligible, you can override the pay category to one that is non-paid. Then, exclude the pay category from being exported in Time Prep. Please see the Pay Prep Section for further clarification.

c. Holiday Eligibility Based On Days/Hours Worked Prior – determines whether or not an employee is eligible for holiday pay based on working a certain number of days in a specific period surrounding a holiday.

d. Holiday Pay - ensures that auto populated holiday pay is equal to the number of hours actually worked on the day of the holiday. For example, if I work 5.5 hours on the holiday, my auto populated hours would equal 5.5 hours.

- **Holiday, Worked Hours**

a. Hours Worked On Holiday (Specific Hours) - specifies that specific hours worked on a holiday should be allocated to a pay category or shift. You can also specify a waiting period for the employees.

b. Hours Worked On Holiday (Majority Hours) **–** allows you to specify the majority of hours worked on a holiday (entire shift, Holiday time only, or Scheduled time only) should be allocated to a pay category or shift. You can also specify a waiting period for the employees.

- **Misc**

a. Change Pay Category – allows a specific pay category to be changed to another based on match criteria.

b. Distribute by Workday Breakdown – allows you to specify what should be considered as worked time to be used in conjunction with Workday Breakdown. This rule will need to be used if Workday Breakdown is calculated on Worked Time, instead of Scheduled Time.

Additionally, the Workday Breakdown profile selected within the rule will apply to already broken-down time (in the event an employee already has Workday Breakdown based on their assigned schedule).

c. Projected Hours Settings – allows you to set up projected hours to display on an employee's timesheet. The rule can be configured to project hours for the entire timesheet, or up to the last 10 days. You will also be able to determine what hours should be projected (scheduled time or a bulk amount of time entered), and what should happen if time is already entered on a day in the period.

d. Zero Out Time for Certain Category - zeroes out hours worked under a specific pay category, cost center, time off definition, etc.

- **Overtime**

a. Bi-Weekly Overtime With Weekly Dependencies – allows you to specify two sets of criteria required in order for an employee to receive overtime. Example: an employee must work at least 40 hours in each of the two week period, and then within each of those weeks, any hours over 42.5 will be Overtime.
b. Crossing Midnight Overtime – allocates time before or after a certain time (i.e. 12:00am) over a specified amount to be considered overtime.
c. Daily Overtime - allocates that over X hours in a day are counted towards overtime and double time.
d. Daily Overtime After Weekly Overtime - applies weekly overtime before allocating daily overtime.
e. Daily Overtime with Weekly Dependencies - applies daily overtime and double time if certain criteria are met within the week. And can allocate paid breaks, lunches, and/or time off.
f. Daily Overtime with Rest Period – applies daily overtime that includes a pre-determined rest period, and resets once the predetermined amount of time has been reached. Example: an employee typically works 8 hours a day, and if they work over that amount they receive Overtime. Additionally, there is typically a 10 hour "rest period" between their 8 hour shifts. With the rule configured, if an employee were to work 8 hours, then return within 10 hours, the second set of worked hours would be calculated as Overtime.
g. Daily Schedule Based Overtime - applies daily overtime and double time if over scheduled hours.
h. Daily Split Overtime – has the system look from midnight to midnight each day to determine if an employee has worked over the designated amount of hours making them eligible for overtime, regardless of any split settings within the Timesheet Profile.
i. Days Profile Overtime – allows you to pull in a Days Profile rule, which can count towards overtime. Example: employees will receive overtime for over 10 hours worked on the last two Saturdays of each quarter.
j. Every Nth Day Overtime – allows you to specify that an employee should receive overtime on certain days of a cycle after meeting specific criteria.
k. Floating 24 Hours Overtime - allows you to allocate overtime based on hours worked within a 24 hour period.
l. Hours Prior to and Passed Scheduled Time - applies overtime and double time to hours worked outside of schedule.
m. Non-Rolling Period (N-Days) Overtime – applies overtime to hours worked within a specific number of days as of a certain date that is not rolling.
n. Nth Day In a Week - applies overtime and double time if you work over a certain number of hours on a specific day of the work cycle. Example: overtime is applied to hours worked on the 6th of 7 days.
o. Nth Day Overtime - applies overtime and double time to hours worked on the Nth consecutive day worked. Example: overtime is applied to hours worked on the 8th consecutive work day.
p. Pay Period Overtime - applies overtime and double time when hours exceed the limit for the pay period. Example: over 80 hours per pay period are considered for overtime.
q. Rolling Period (N-Days) Overtime – applies overtime to hours worked within a specific number of days on a continual rolling basis.
r. Weekly Overtime (From-To Specific Hour) - allows you to calculate overtime or doubletime on a weekly basis with a start and end time for the week.
s. Weekly Overtime (v.3) - applies overtime and double time when hours exceed the limit for the week, as defined in this rule. Example: over 40 hours per week are considered for overtime. Also allows the specification for the overtime to apply if the employee works over their scheduled hours or over a certain number of hours per week.

- **Rates**
  a. Add Extra Flat Pay Rate (Weekly) - allows you to add a dollar amount to the employee's rate based on certain conditions. Example: if the employee works over 10 hours in a particular day, add $1.00 to the employee's rate.
  b. Apply Timesheet Rate Table – will apply the rate directly to the employee's timesheet.
- **Shift Premium**
  a. Shift Based on Advanced Filter - applies shift based on criteria defined in user file. Example: a shift is assigned to hours worked in a specific cost center.
  b. Shift Based on Day of the Week and Majority Hours of Day - applies hours to shift with majority of time worked in that shift.

c. Shift Based on Day of the Week and Time of Day - applies shift premium to certain time periods on certain days. Example: an employee is entitled to a shift premium if they work anytime between 12:00AM and 7:00AM on Friday.

d. Shift Based on Day of the Week and Time of Day with Grace Time - applies shift premium and/or pay category to certain time periods on certain days, with a grace period of when an employee could punch and receive premium. Example: an employee is entitled to a shift premium if they work anytime between 12:00AM and 7:00AM on Friday, and if they arrive 30 minutes prior to shift time.

e. Shift Based On Day Of The Week And Time Of Day With Required Minimum Time - allows you to specify a premium based on day of week, time of day, with required minimum hours worked in that shift to be eligible for the premium.

f. Shift Based on Day Of Week/Time of Day and Next Shift Premium – applies a shift premium based on days of the week and time worked, with certain criteria (when shift starts, when shift starts after worked past scheduled time, etc.).

g. Shift Based on Schedule - applies shift and/or time off based on schedule hours worked.

h. Shift Based on Type of Schedule - applies shift based on type of schedule (free flow, fixed, etc.)

i. Shift Based on Start or End Time - applies shift if the employee's start or end time is within a defined range. Example: an employee is entitled to a shift premium if their in punch is between 8:00PM and 10:00PM.

j. Shift Based on Start or End Time and Day of the Week –

k. Shift Based on Time of Day - applies shift premium to a specific time of day everyday. Example: an employee is entitled to a shift premium if they work anytime between 12:00AM and 7:00AM.

l. Shift Based on Type of Schedule – applies a shift premium to hours prior to or past an employee's scheduled hours.

m. Shift Override – tells the system to recognize any shift overrides on the employee's timesheet instead of applying the shift rules from within the pay calculations profile. By default the system will always go based on the pay calculations rules, regardless if the shift is changed on the timesheet. This tells the system to make the timesheet edits the priority.

n. Split Shift after Set Number of Hours in Day – will split an employee's shift at a certain point, once the shift has exceeded a certain number of worked hours, specified by day of the week. Example: if an employee has worked longer than 14 hours, after the 8 hour mark the system will split the shift into two – assigning the first 8 hours to 1st shift, and the latter hours to 2nd shift.

- **Time Off**
  a. Daily Time Off Hours Premium - splits time off proportionally among pay categories. For example, if the employee had 45 hours of vacation, the hours could be split as 40 Regular/Vacation, 5 Overtime/Vacation.
  b. Distribute Time Off Cost Centers – will distribute time off entered on the timesheet proportionally across cost centers based on where the hours have been worked throughout the pay period.
  c. Reduce Time Off Hours by Hours Worked That Day – will reduce the employee's already entered Time Off hours based on any hours they've worked that day.

i. Click on the button pertaining to the step you want to work with. When the pop-up window closes, the step you had selected will appear in the list of rules and will need to be configured accordingly.

j. Continue adding rules and click

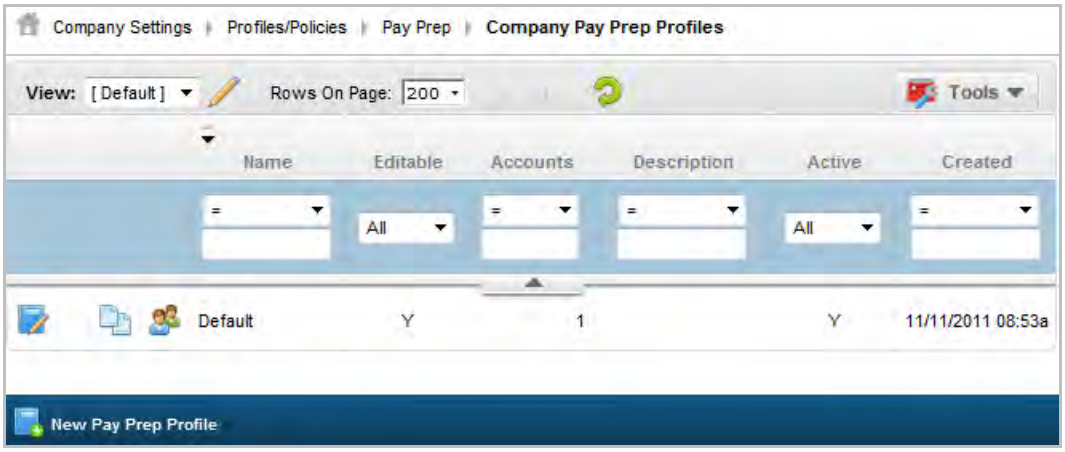
button when finished.

Pay Prep Profile

The Pay Prep Profile applied to a user account determines final summation of hours. You can determine if the sum is grouped by day, week, and pay period, etc. You also have the option of having separate totals for each cost center or other time entry extra field.

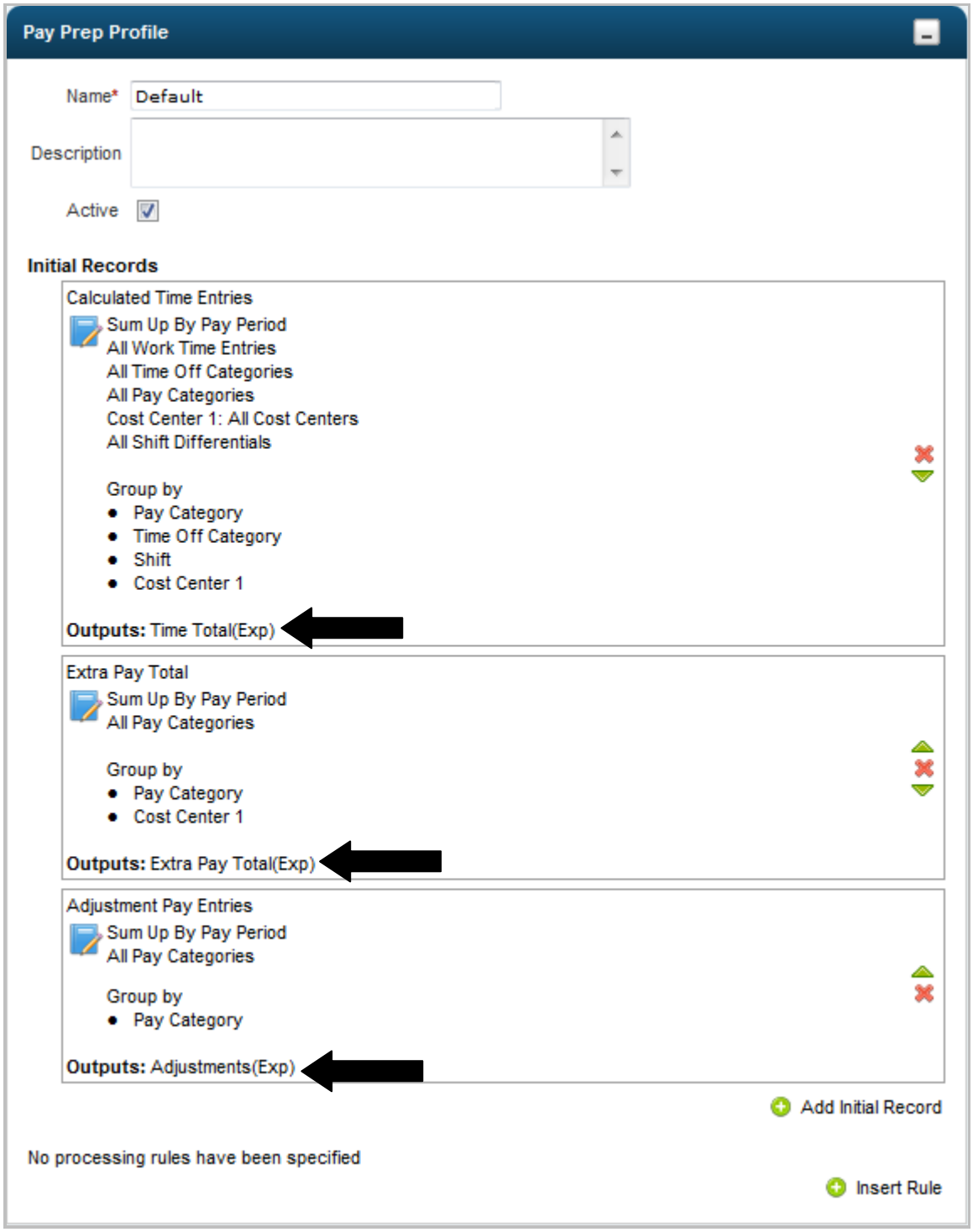
To create a Pay Prep Profile:

1. Select **Company Settings > Profiles/Policies > Pay Prep**. The Company Pay Prep Profiles screen will display. This screen lists any Pay Prep Profiles that have been created.



2. Click the

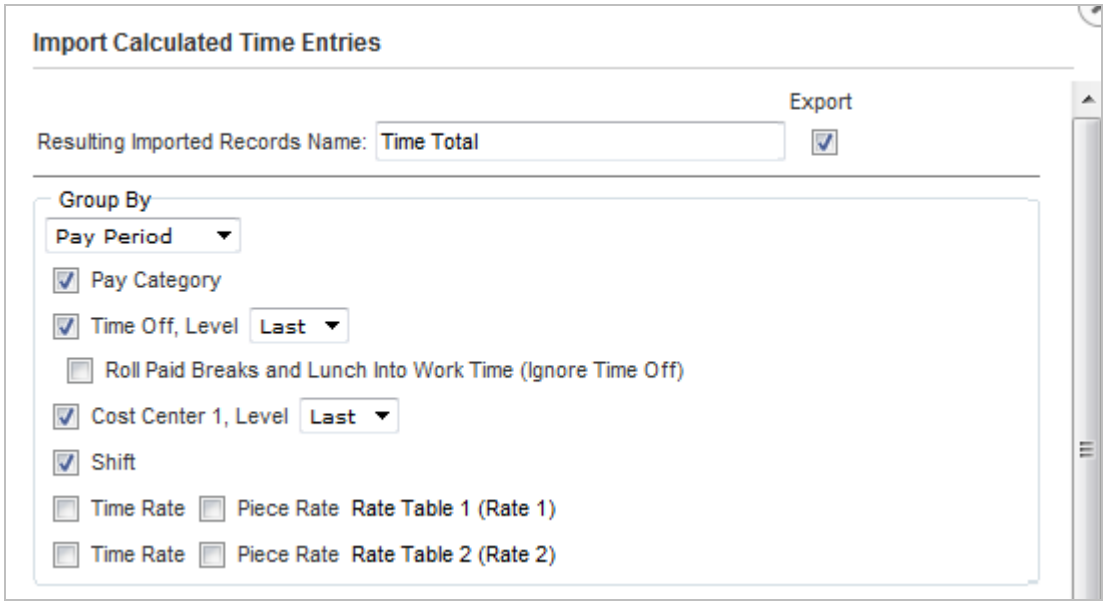
button. The Edit Pay Prep Profile screen will display. This screen is used to create the rules associated with the Pay Prep Profile you are adding. Enter a name and description for this Pay Prep Profile.



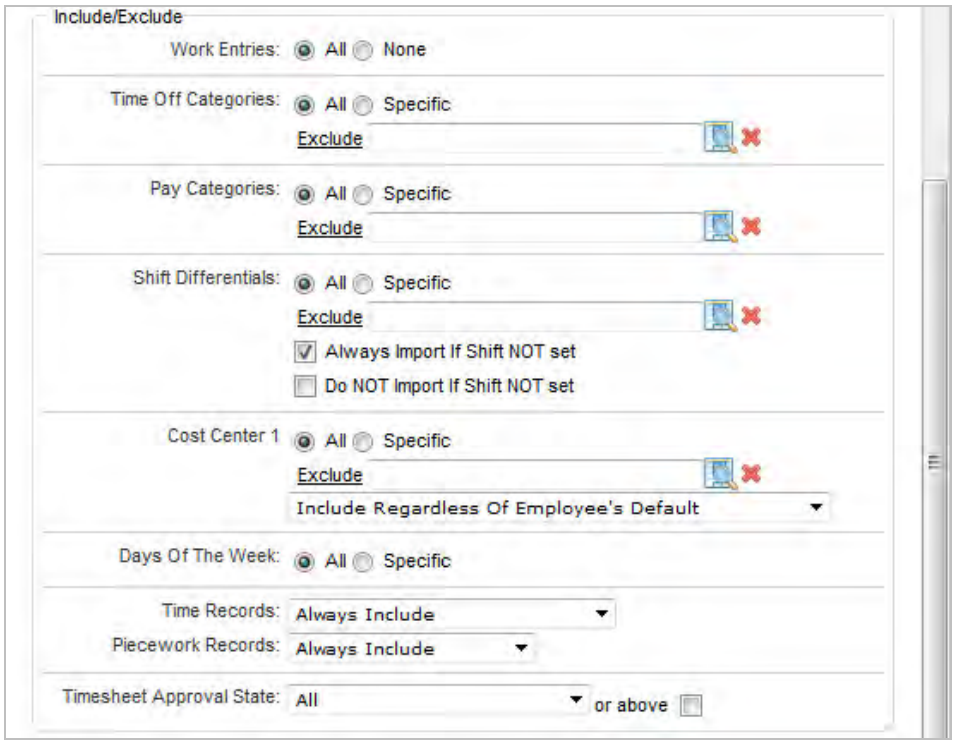
- **Initial Records** - allows this profile to review all data collected on timesheets and group it into specific records. In the example above, we are exporting the following:
  c. **Time Total** - a summation of all time entries.
  d. **Extra Pay Total** - a summation of all extra pay entries.
  e. **Adjustments** - a summation of all adjustment entries.

3. You must click the Add Initial Record button to add additional records to this profile

4. Click the Edit Rule button next to the initial record to edit the settings currently configured. The following window will display for Calculated Time Entries.



- **Resulting Imported Records Name** - allows you to name the record you are creating.
- **The Export** checkbox allows you to specify whether or not you would like this record to be exported to payroll.
- **Group By** - allows you to group your calculated time entries by any of the items listed. For example, if you need to export time allocated to specific jobs, you would want to select the Cost Center 1 checkbox, as shown above.



- **Include/Exclude -** allows you to define whether or not certain categories should be exported. For example, if an employee has **Unpaid Time Off** entered on their timesheet, you may want to prevent these hours from passing to payroll.
- **Time Records -** allows you to include or exclude time records based on how they were entered on the timesheet.
- **Piecework Records -** allows you to include or exclude piecework entries based on how they were entered on the timesheet.
- **Timesheet Approval State –** allows you to include or exclude timesheets based on the timesheet's approval state. By default the system will continue to assume that all timesheets, whether or not they are approved, should export. Through this setting, the timesheet states which should be included in the export file can be designated.

- Select the checkbox for **Add Zero Record** if you would like an employee with zero hours to export to payroll. This setting should also be enabled for accruals based on hours worked, as accruals should be updated even when the employee has not worked.
- **Negate Total Time -** when pay prep is processed, this setting allows you to make time entered and summed up by this record a negative value.
- **Clear Total Time –** when pay prep is processed, this setting allows you to clear out any time summed up by this record and exclude it from exporting.
- **Clear Time Rate –** when pay prep is processed, this setting allows you to clear out any rates associated with time that's been summed up in this record.
- Clear Piece Rate – when pay prep is processed, this setting allows you to clear out any rates associated with piecework that's been summed up in this record.
-

3. Click

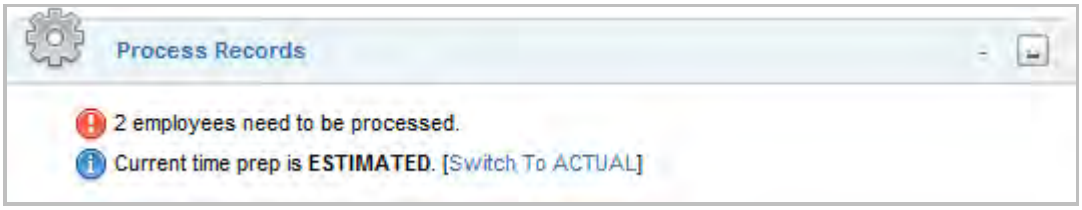
button and select the process you want to use from the pop-up window. When the pop-up window closes, the process you selected will appear in the **Initial Records** area.
4. Records are broken up into specific categories:
   - **Accruals**
     - Import Accrual Balances – allows you to export hours taken, earned, remaining, or accrued (year to date).
   - **Adjustment Pay**
     - Adjustment Pay Entries – sums-up and allows you to export adjustment pay entries from the employee's timesheet.
   - **Base Hours**
     - Simple Base Hours – allows you to define a set number of base hours per day, week, or pay period to export. This can be used to override hours on the timesheet, be added in addition to clocked hours, or is used for hours worked accruals (please see the accruals section for more details).
   - **Base Pay**
     - Pro-Rated Base Pay – allows you to prorate an employee's base pay amount.

- Simple Base Pay – similar to Simple Base Hours, except using a dollar amount instead of a number of hours.

- **Estimate**
  - Estimate Missing Time – allows you to estimate time worked for an employee based on a typical work week, used in-conjunction with the time prep process steps for estimating time and taking snapshots. This is useful for companies that pay current.

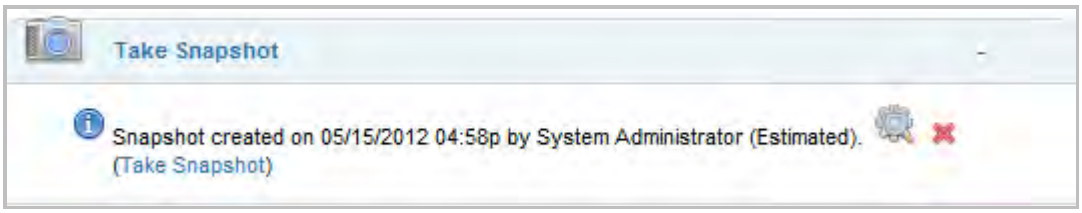
Once estimates are configured, additional steps must be added within the **Time Prep Process** in order to have the system calculate the estimates, actual, and also determine a difference. The **Calculate Hours (With Estimates) and Take Snap Shot Business Process Steps** will need to be enabled within the **Company Information** screen.

When the payroll is ready to be processed (before the actual pay period end date), the user will go to **Manage Payroll > Manage Payrolls > Process and Export**, and select the current pay period. The process will be the same until the **Process Records** step.

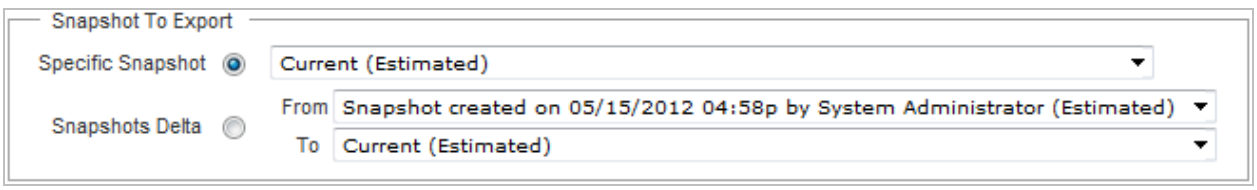


By default the **Process Records** will be set to **ESTIMATED**. This will allow you to run the **Process Records** step taking any completed time entries currently on the timesheet, and completing the rest of the pay period based on the configuration of the **Estimate Missing Time** record.

After Processing Records, you'll need to **Take Snapshot** in order to save the employee's worked and estimated time.

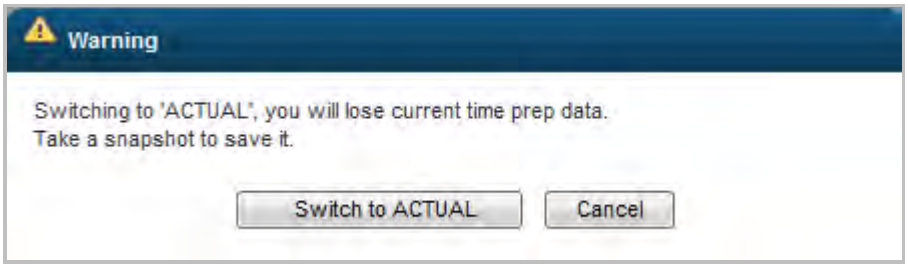


Once the snapshot is taken a timestamp will appear – you have the ability to take multiple snapshots, or delete them if needed.

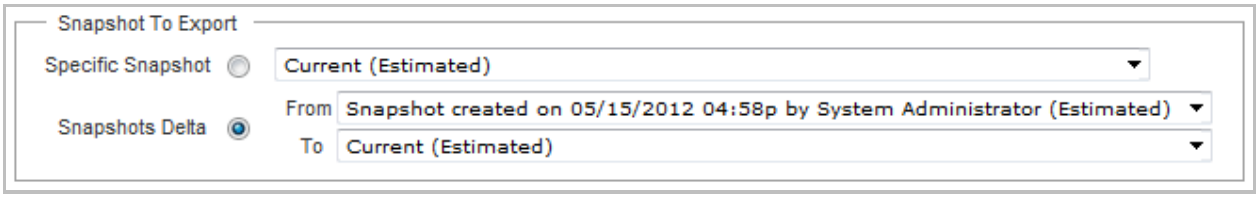


To export the estimated time, within the **Create Payroll Interface File**, you'll want to select the **Specific Snapshot** you've created.

Once the pay period has ended, you'll need to go back into what is now the previous Pay Period, and go through the **Time Prep Process** again.



The process will be the same until the **Process Records** step. Here, you'll need to click on the hyperlink to switch from **ESTIMATED** to **ACTUAL**. The system will then process the employee's records based solely on what is entered on their Timesheet.



The final step**, Create Payroll Interface File** will allow you to export the difference between your original snapshot, and the employee's final time after the pay period has ended. So, in the event you exported 80 hours for an Employee but they only worked 72, the system would export -8.

- **Extra Pay**
  - Extra Pay Entries – sums-up and allows you to export extra pay entries from the employee's timesheet.
- **Time Entry**
  - Average Calculated Time – determines the average hours worked per weekly, bi-weekly, monthly, quarterly, or pay period time frame based on criteria defined within the record.
  - Calculated Time Entries – sums up and exports hours from the employee's timesheet based on the grouping and inclusions/exclusions defined within the record.
  - Calculated Time Entries By Timesheet Pay Date – sums up and exports hours from the employee's timesheet based on the grouping and inclusions/exclusions defined within the record, based on the timesheet's pay date.
  - Calculated Time Entries v.2 – similar to Calculated Time Entries, however, this rule allows you to set specific pay categories, cost centers, etc., for the grouped information to export as.
  - Work Day Summary – allows you to export a punch summary for each worked day, based on the first in and last out punch.
  - Time Entries – allows you to export a punch summary for each worked day including in and out punches.
- **Work Schedule**
  - Work Schedule Summary – allows you to export a summary of the employee's work schedule.

5. Click the Insert Rule button and select the processing rule you'd like to use from the pop-up window. When the pop-up window closes, the process rules you've selected will appear in the **Processing Rules** section.

6. Rules are broken into specific categories:

- **Checks**

  - Conditional Check And remove Entry Records – allows you to remove time entries from an Initial Record if those records are empty.

  - Conditional Check If Total Hours Under Minimum – allows you to remove or zero out the total hours by pay period, day, or week if they are below a certain threshold within any of the initial records.

  - Check Time Entry Fields Are Populated – allows you to generate a warning or error if the fields are not set.

- **Docked Time**

  - Docked Time From Schedule – allows you to dock an employee's time from their schedule if they haven't worked at least their scheduled hours, or a specified amount within the rule.

  - Docked Time From Base Time – allows you to dock an employee's time from the initial record's base hours if they haven't worked at least that amount.

- **Math**

  - Add Time Records – allows you to add more than one initial record together.

  - Multiply Time – allows you to multiple an initial record by a set amount (i.e. multiply by 2 to double).

  - Subtract Time Records – allows you to subtract one initial record from another.

- **Overtime**

  - Daily Overtime – similar to the pay calculation profile rule, this allows you to apply daily overtime during the time prep process instead of having it calculate directly onto the employee's timesheet.

  - Simple Pay Period Overtime – similar to the pay calculation profile rule, this allows you to apply pay period overtime during the time prep process instead of having it calculate directly onto the employee's timesheet.

  - Simple Weekly Overtime – similar to the pay calculation profile rule, this allows you to apply weekly overtime during the pay prep process instead of having it calculate directly onto the employee's timesheet.

- **Rates**

  - Apply Weighted Average Overtime Rate – allows you to pull the employee's rate(s) and divide it by their worked hours, including any extra pay and additional records, only applying the premium to that amount. For example, if Overtime has a multiplier of 1.5, this rule will take the employee's rate and multiply it by .5, and add that as an additional rate for the Overtime hours.

  - Apply Blended Overtime Rate – allows you to pull the employee's rate(s) and divide it by their worked hours, including any extra pay and additional records, and overrides the initial rate with the new calculated amount for the Overtime hours.

  - Apply Rate Table – allows you to apply the employee's rate table or a specific rate table to the employee's processed time.

  - Apply Split Overtime Rate – allows you to calculate an employee's rate based on their total worked time (potentially across multiple pay categories with multiple rates of pay), and to then have the Overtime rate of 1.5 be applied accordingly. The Pay Prep Profile will need to have the employee's regular hours as well as other hours grouped separately within the Initial Records, and Rate Tables will need to be enabled and tied to the employees accordingly.

  - Apply Variable Overtime Rate – allows for the employee's overtime rate to be calculated per week, by taking the employee's weekly salary, dividing by the number of hours worked within the week, taking the total, and multiplying that by the overtime pay category multiplier. This amount is then paid on top of the employee's salary for the week.

  - Calculate Rate Information – in conjunction with piecework, will calculate an hourly rate to pay an employee based on the rate they receive per piece.

- Calculate Average Rate – allows you to calculate the employee's average rate.
- Calculate Rate Based on Employee Compensation – allows you to calculate the employee's hourly rate based on their pay period salary, and the number of hours they've worked within the pay period.
- Copy Rate – allows you to copy or add rates from one rate field to another (i.e. the base rate, actual rate, or the difference between the two).
- Calculated Rate Based on Formulas – allows you to create custom rate calculations based on a list of available expressions that can be applied to the different rate tables within the system.

- **Rounding**
  - Round Time – allows you to round the total time that results from the time prep process and all of the previous processing rules.
- **Split Time**
  - Split Hours Based On Cost Center Breakdown – allows the breakdown of an employee's calculated time based on the percentage breakdown of cost centers the employee worked in a given period. The percentages will apply to the employee's base hours, and can be set to round.

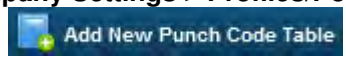
7. Continue adding processing rules, as appropriate, in the order they should be processed and click

when finished.

Punch Code Lookup Tables

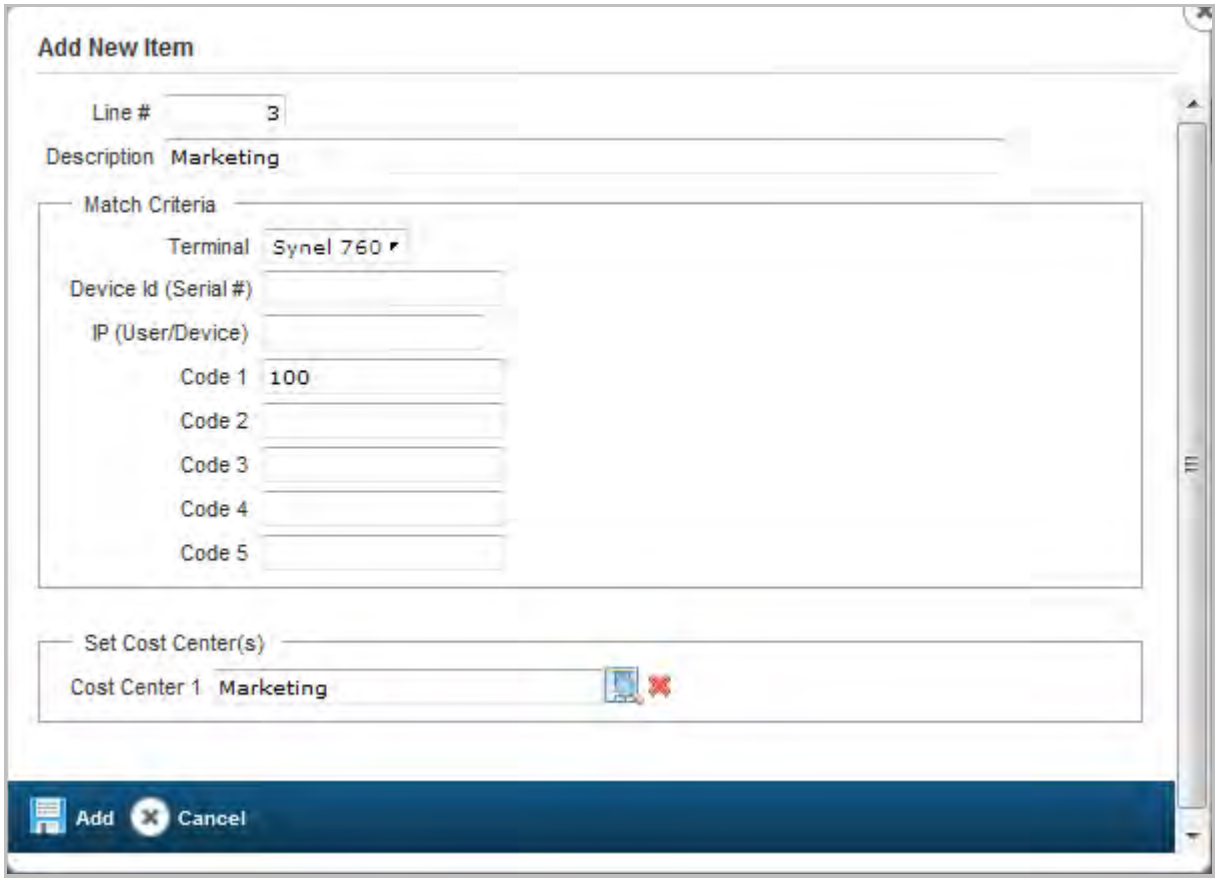
The **Punch Code Lookup Table Profile** allows you to specify that punches coming in from a specific hardware device should be allocated to a cost center or multiple cost centers. In the example below, any punches coming from the Synel 715 will be allocated to the Help Desk Cost Center, and any punches from the RSI HandPunch will be allocated to the Data Synchronization Cost Center.

To create a punch code table:

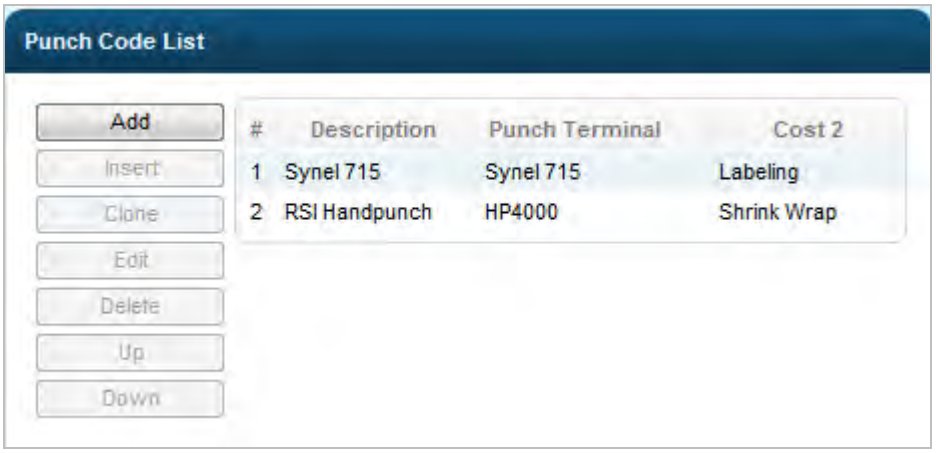
1. Select **Company Settings > Profiles/Policies > Punch Code Lookup Tables.**
2. Click on the 

button to bring up the Edit Punch Code List screen. Give the table a name, and click **Save**.
3. Click the

button to add a new item to the Punch Code List. As shown in the image below, you are able to select the **Terminal** and enter in **Codes 1-5**. For any hardware device that currently supports job costing, the codes allow you to allocate your punches to multiple cost centers as shown in the **Set Cost Center(s)** box. In the example below, if an employee punched in to Code 100 at the Synel 760 terminal, their punches would be allocated to the **Marketing Department** and the **Distribution Project** (two levels of job costing).



4. Click .
5. In the example below, any punches coming from the Synel 715 will be allocated to the Help Desk Cost Center, and any punches from the RSI Handpunch will be allocated to the Data Synchronization Cost Center.



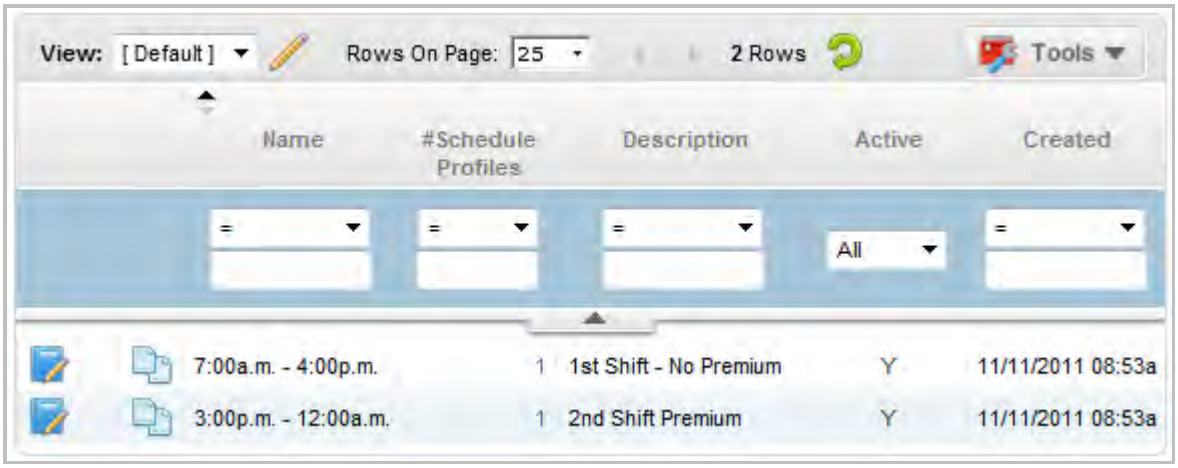
6. Once you create a **Punch Code List**, you must then assign the list to the appropriate **Timesheet Profile**, within the **Punch Settings** window. Then, all users assigned to this profile will have this Punch Code List apply to their punches.

Schedule Profile

The Schedule Profile applied to a user account determines the user's work schedule. You can create any number of **Schedule Daily Rules** and permanent **Work Schedules** to reflect the different schedules used within your organization. You can also have Web Based Time & Labor Management auto populate the user's timesheet with their work schedule (this is specified in the **Employee Information Edit** screen of the user's account).

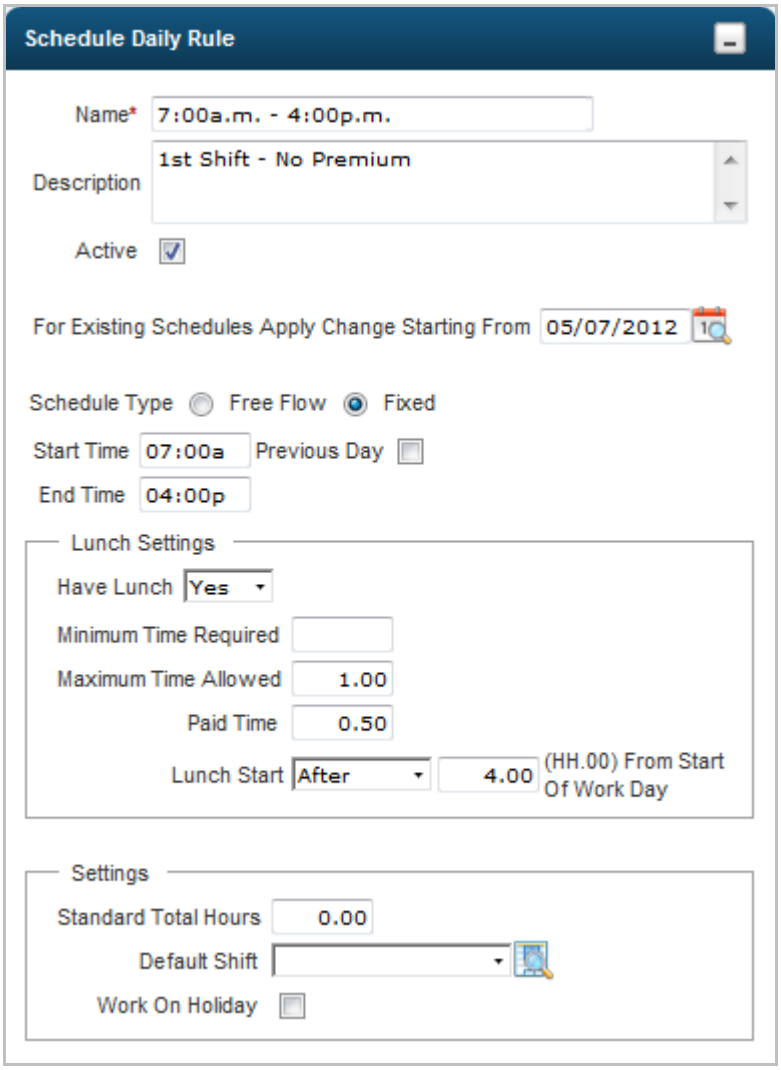
To create daily schedule rules:

1. Select **Company Settings > Profiles/Policies > Schedules > Daily Rules.**



2. Click on the

button to bring up the **Edit Daily Work Schedule** window.

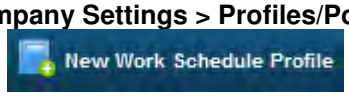


- **Name** / **Description** - Enter the Name and Description of schedule.
- **Schedule Type -** by default there are 4 options:
    a. **Free Flow -** allows you to enter a bulk amount of hours for a day. Example: 8 hours.
    b. **Fixed** - allows you to enter a start and stop time for the schedule. Example: 9AM-5PM as in the example above.
    c. **Floating** - allows you to enter in a range of start times and total hours. Example: the employee can arrive between 8AM-10AM, but they must work a total of 8 hours.
    d. **Flexitime** – allows for a flexible start and/or end time. Example: the employee can start between 7AM – 10AM, and leave between 3PM – 6PM, but must work between the hours of 10AM – 3PM.
- **Start Time -** when fixed is selected, enter in the start time of the schedule.
- **Previous Day -** check if the start time occurs on the previous day than the end time.
- **End Time -** enter in the end time of the schedule.
- **Have Lunch -** select yes or no if this schedule has a lunch. If yes, please fill in the following options:
    a. **Minimum Time Required -** the minimum time an employee is allotted for lunch.
    b. **Maximum Time Allowed -** the maximum time an employee is allotted for lunch.
    c. **Paid Time -** indicates the amount of time that will be paid for lunch
    d. **Lunch Start -** indicates when lunch starts. Example: after 4 hours of work, or at 12 o'clock
- **Standard Total Hours -** type in the standard hours for this daily rule.
- **Default Shift -** select the button and choose the shift you would like to use.
- **Work on Holiday** - select this box if this rule applies to holidays.

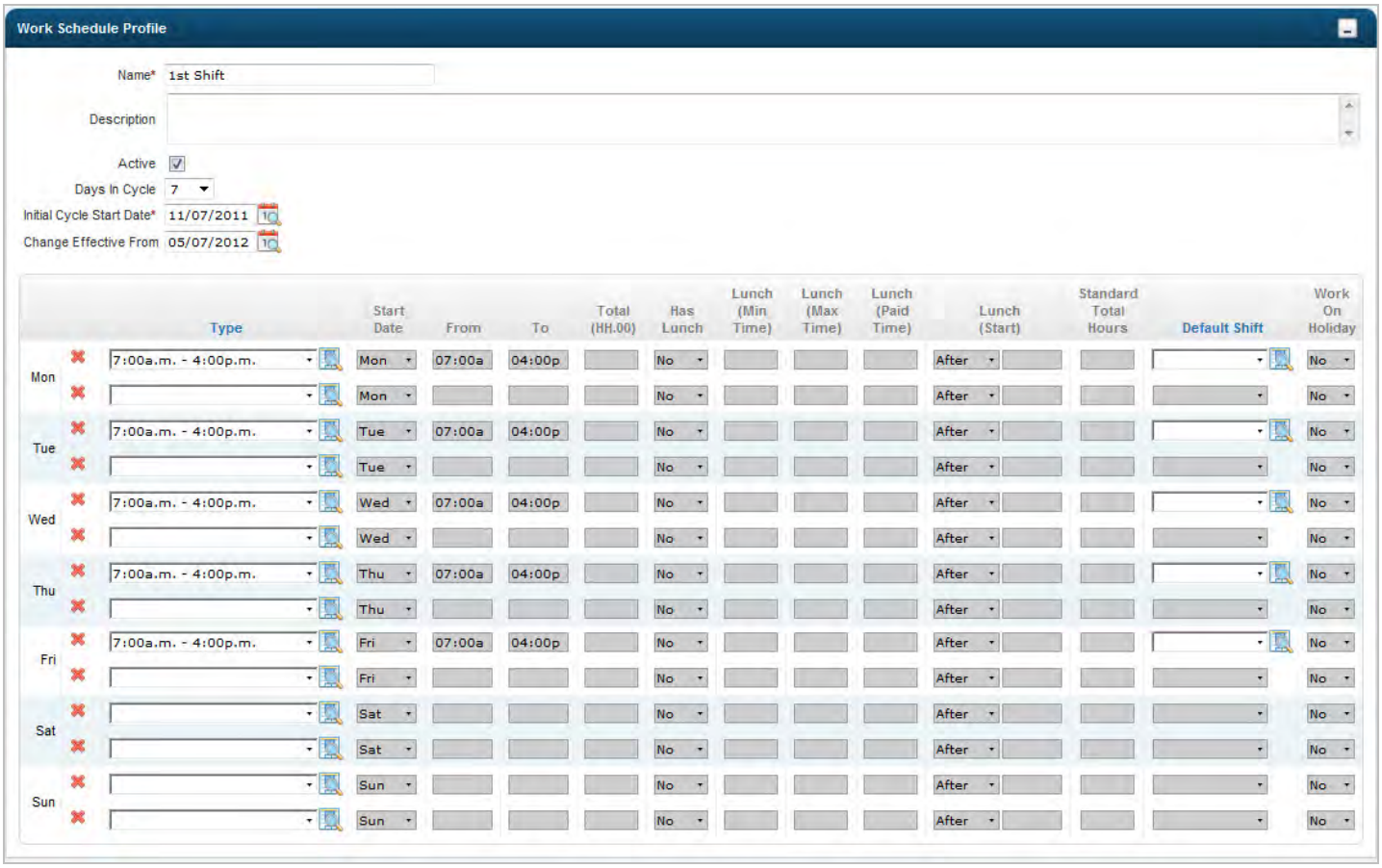
3. Click the

button when finished.

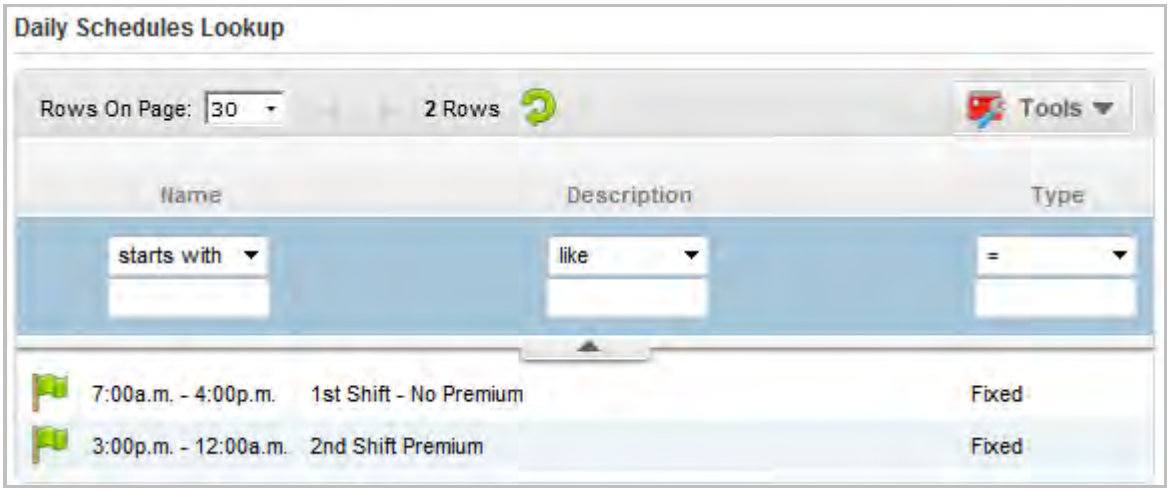
To apply daily rules to work days:

1. Go to **Company Settings > Profiles/Policies > Schedules > Work Schedules**.
2. Select the 

button. This will take you to the **Edit Work Schedule Profile** screen.

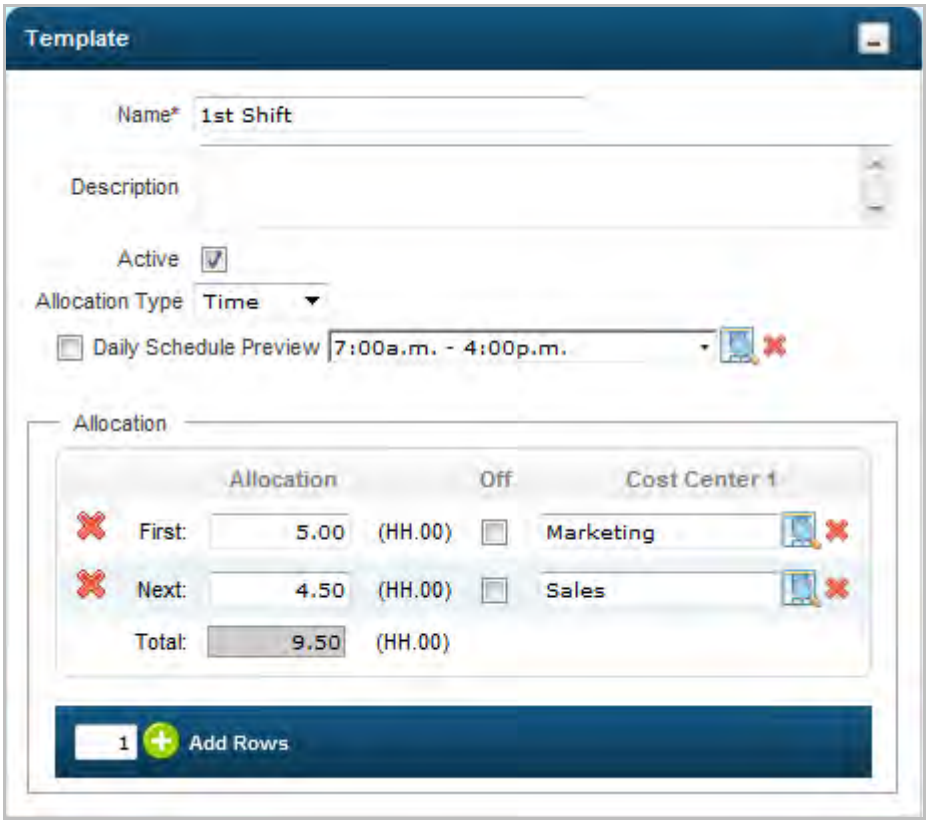


- **Name** - type in the name of the work schedule.
- **Description** - type in a brief description of the work schedule. In the example above, the description of the 1st Shift is 7:00a.m - 4:00 p.m.
- **Days in Cycle -** allows you to specify how many days are in the schedule cycle. In the example above, the schedule reoccurs every 7 days.
- **Initial Cycle Start Date -** allows you to specify the date to be considered as day 1 of the cycle. In the example above, day 1 of the schedule starts on 1/2/05 - Sunday. ***NOTE: changing the days in cycle or cycle start date will take affect from this date forward.***
- Change Effective From - specifies the date the change is effective as of.
- Click on the button at the end of the day that you need to change. The image below will show:



- Choose a new schedule by clicking on the button to the left of the schedule name.

3. Continue this process until all changes in the cycle are updated.
4. If On The Fly Scheduling has been enabled within Global Settings, select the "Fixed" schedule type, and then enter in the from and to times.
5. You may also allocate the specific schedules to cost centers, which can be done by clicking on the button.
6. **Breakdown** will allow you to allocate specific cost centers to time within the schedule. You can create a **Workday Breakdown Template** by clicking on **Breakdown**, or by going to **Our Company > Profiles/Policies > Schedules > Workday Breakdown Templates**.
7. Click on the Add New Template button to create a new Workday Breakdown Template



- **Name** - Type the name of the Template
- **Description** - Enter in identifying information for the template (i.e. 7am to 4:30pm schedule).
- **Allocation Type** - You may choose Time or Percentage from the drop-down menu, which will allow you to allocate your time within the schedule accordingly.
- **Allocation** - You may enter in the bulk hours or percentage of time within the schedule that should be allocated to a specific cost center, which you may select by clicking on the button. To add additional breakdowns, click on the Add Rows button.

8. Click on the Save button to save the permanent changes to this employee's breakdown.

9. Workday Breakdown Profiles can be configured to apply twice; first traditionally through the assigning of a Profile within a Schedule (as outlined above), and second within the Pay Calculations Profile, using the "Distribute Workday Breakdown" rule.

10. Click Previous Screen to return to the **Work Schedule Cycle**.

11. If **On The Fly Scheduling** has been enabled within Global Settings, select the "**Fixed**" schedule type, and then enter in the from and to times.
12. Select the Create New Daily Schedule button to create a new schedule.
13. Select the Save button when finished.

Tips on Managing Schedule Profiles

At some point you may need to modify or delete a Schedule Profile. Go to **Company Settings > Profiles/Policies > Schedule Daily Rules** or **Work Schedule** and use the following guidelines:

- **Before you modify a Work Schedule**, you might want to view the user accounts associated with it. To do this, simply click the button next the Work Schedule you want to modify.
- To **modify a Schedule Daily Rule or Work Schedule,** click the button next to the Schedule Profile you want to modify. Make your changes as desired and click the **Save** button.
- To **delete a Work Schedule** click the button next to the Work Schedule you want to delete. The system prompts you to confirm the deletion. Click **OK**. Note that you cannot delete any profile that has a user account associated to it.
- To **clone a Schedule Daily Rule or Work Schedule,** click the button next to the Schedule Profile you want to clone and answer 'Yes' to the warning message. Next, click the button next to the copied Schedule Profile. Rename it and make your changes as desired and click the **Save** button.

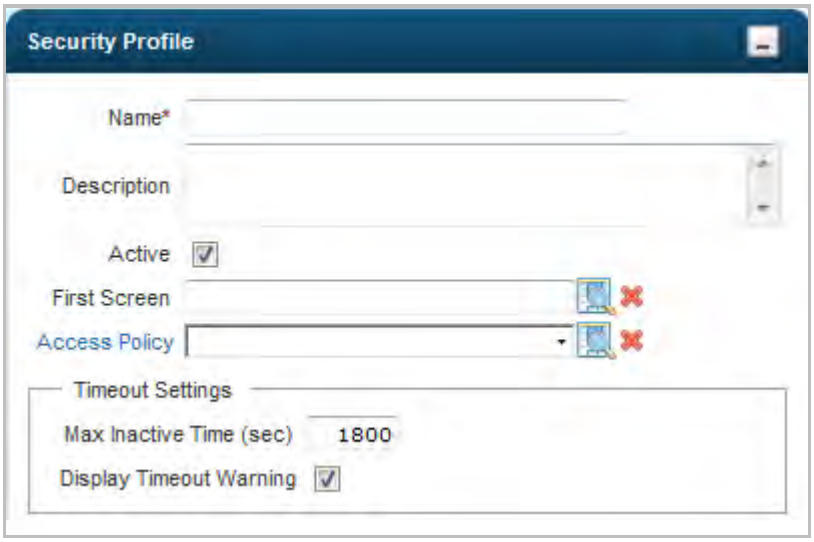
Security Level Profiles

Four default Security Level Profiles are provided in Web Based Time & Labor Management: **Company Administrator**, **Payroll Administrator, Department Manager**, and **Employee**. The Security Level Profile applied to a user account determines the user's access privileges to system functions (what the user can see in the system). You can configure the settings associated with these default Security Level Profiles, as well as create additional Security Level Profiles.

NOTE: The Security Level Profile determines a user's access privileges to system functions, while **Groups** and **Group Permissions** determines a user's access privileges to other user accounts (who they can see in the system).

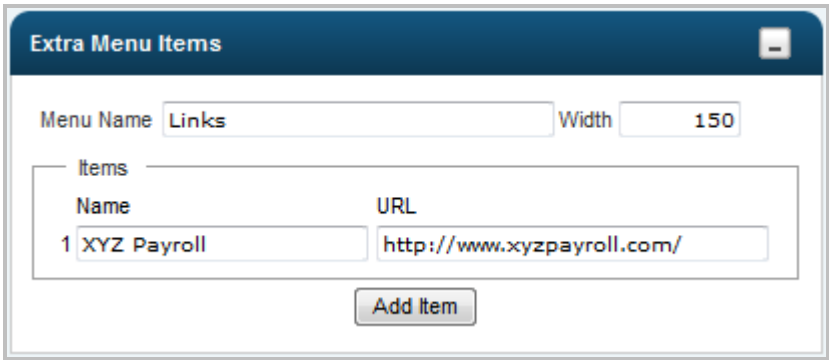
To create a new Security Level Profile:

1. Select **Company Settings > Profiles/Policies > Security**. The **Company Security Profiles** screen shows you four predefined Web Based Time & Labor Management Security Level Profiles and the number accounts associated with each.
2. To create a new Security Level Profile, click on the New Security Profile button. The **Security Profile Edit** screen displays. Enter the properties of the Security Profile. The table below provides definitions for each field/setting.

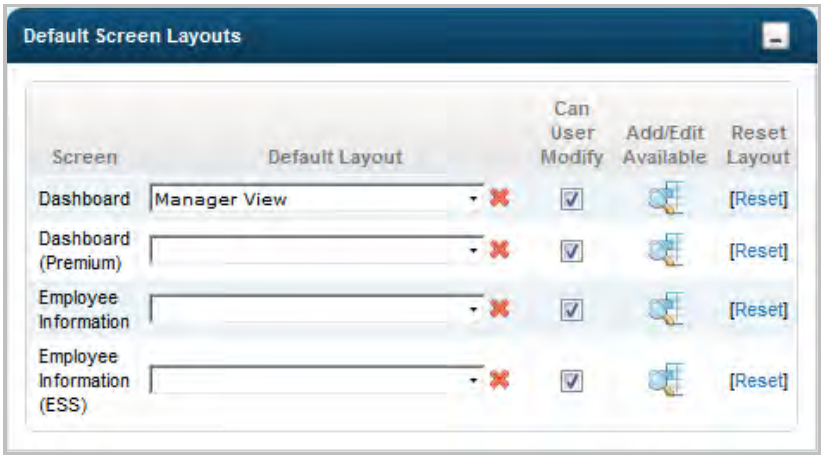


- **Name -** name of the Security Profile.
- **Description -** brief description about the Security Profile.
- **First Screen -** first screen displayed to users assigned to this Security Profile upon successfully logging in. May also be selected within user account if this default is not used.

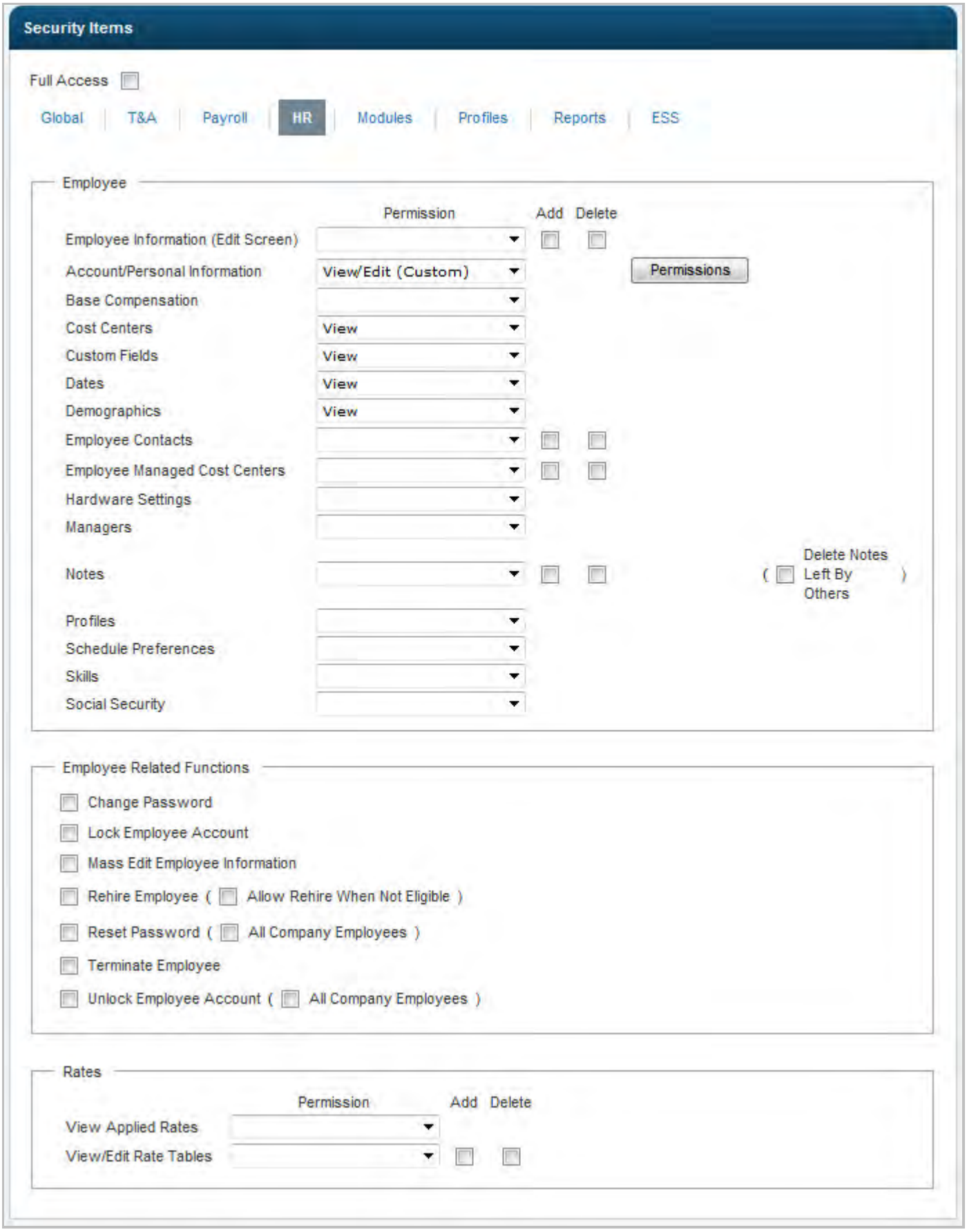
- **Access Policy -** access policy applied to users assigned to this Security Profile that restricts the IP addresses where a user can login.
- **Timeout Settings**
  a. **Max Inactive Time (sec) -** length of time (in seconds) the system should wait to log the user out when no activity occurs.
  b. **Display Timeout Warning -** select this checkbox if you want Web Based Time & Labor Management to display a warning before the system logs the user out when the **Max Inactive Time** is reached.



- **Extra Menu Items -** allows you to create an additional menu on your menu bar with external links.
  a. **Menu Name -** the name of the menu you would like to create.
  b. **Width -** allows you to specify the width of the menu, to include more text.
  c. **Click** the Add Item button to add items to your list:
    i. **Items -** allows you to enter the **Name** of the link and its **URL**.



- **Default Screen Layouts** – allows you to create and set defaulted Dashboards for users assigned to different Security Profiles.
  a. **Screen –** the screens that can be configured with defaults; Dashboard, Premium Dashboard, Employee Information Profile, and/or Employee Information (Employee view).
  b. **Default Layout –** the defaulted view that will apply to all users assigned to the Security Profile.
  c. **User Can Modify –** if enabled, the user will have the ability to edit their defaulted screen and customize it, based on the defaulted options made available via the Security Profile.
  d. **Add/Edit Available –** allows you to create a default screen, and select it within the "Default Layout" box.
  e. **Reset Layout –** will re-set the Default Layout.


Security Items
Full Access
Global
T&A
Payroll
HR
Modules
Profiles
Reports
ESS
Employee
Permission
Add
Delete
Employee Information (Edit Screen)
Account/Personal Information
View/Edit (Custom)
Permissions
Base Compensation
Cost Centers
View
Custom Fields
View
Dates
View
Demographics
View
Employee Contacts
Employee Managed Cost Centers
Hardware Settings
Managers
Notes
Delete Notes Left By Others
Profiles
Schedule Preferences
Skills
Social Security
Employee Related Functions
Change Password
Lock Employee Account
Mass Edit Employee Information
Rehire Employee
Allow Rehire When Not Eligible
Reset Password
All Company Employees
Terminate Employee
Unlock Employee Account
All Company Employees
Rates
Permission
Add
Delete
View Applied Rates
View/Edit Rate Tables

- **Security Items -** allows you to modify security items by clicking on specific tabs and highlighting the features you would like to make available. By highlighting the Full Access check box, all features will be made available in the Security Profile.

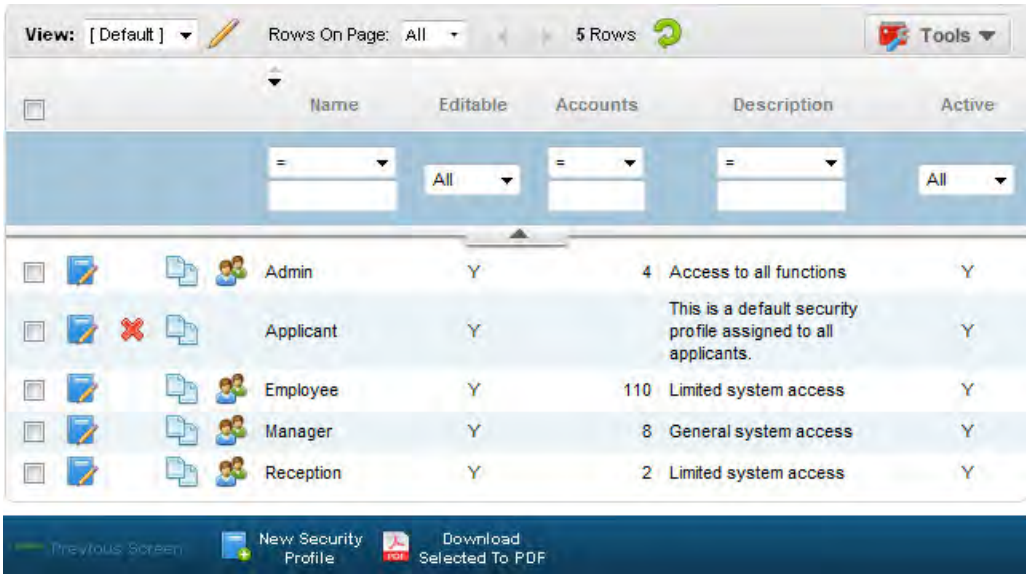
NOTE: Any user with access to edit the Security Profile cannot enable functionality that they themselves do not have access to. For example, if as a manager I am able to edit the Security Profile but I cannot Add Employees, I would not be able to enable the Add Employee functionality on another security profile.

- The **Global** tab allows you to grant a user access to the configuration of a company, which allows them to manage the creation of codes, cost centers, pay types, etc.
- The **Time Management** tab allows you to grant a user access to time editing / approving functionality. Please note that the Security Profile works in conjunction with the Groups module. The Security Profile gives the user access to the specific screens they will need to see in order to edit / approve timesheets. However, they must also be assigned to the appropriate employees within the Groups module in order to see employees in those screens.
- The **Payroll Management** tab allows you to grant a user access to run through the Time Prep Process and configure the Payroll Export Format.
- The **HR Management** tab allows you to grant a user access to view / edit information within the employee's file, as well as terminate, rehire, and change employee's passwords. Enabling settings on this tab works in conjunction with our Groups module, same as with Time Management.
- The **Modules** tab allows you to grant a user access to Points, Schedules and Accrual Balances from a functional perspective. For example, you would not be able to change the configuration of the Profiles associated to these modules, however, you can change an employee's schedule, run accruals, and view point balances.
- The **Profiles** tab allows you to grant a user access to view, edit, add and delete profiles within the system including Benefit Accruals, Holiday tables, Security Profile, Timesheets, etc.
- The **Reports** tab allows you to grant a user access to view various reports within the system. A user's access to specific employees within reports is determined by our Groups module. Several reports also have the option for "All Company Employees", this would allow you to enable a report and bypass the Groups module, giving a user access to view everyone in the company if they have access to that report.
- The **ESS** (Employee Self Service) tab allows you to grant a user access to their personal employee file, timesheet, request time off, and access other personal information.

3. Click the

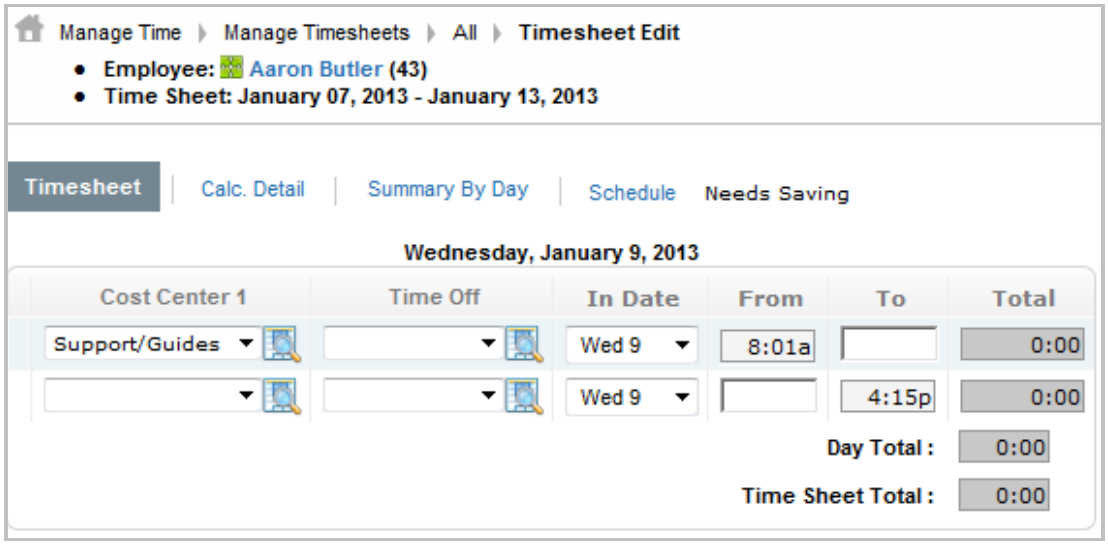
button to save your changes.

4. Security Profiles can be downloaded to PDF by clicking on the "Download Selected to PDF within the main profile screen, or within each individual profile.

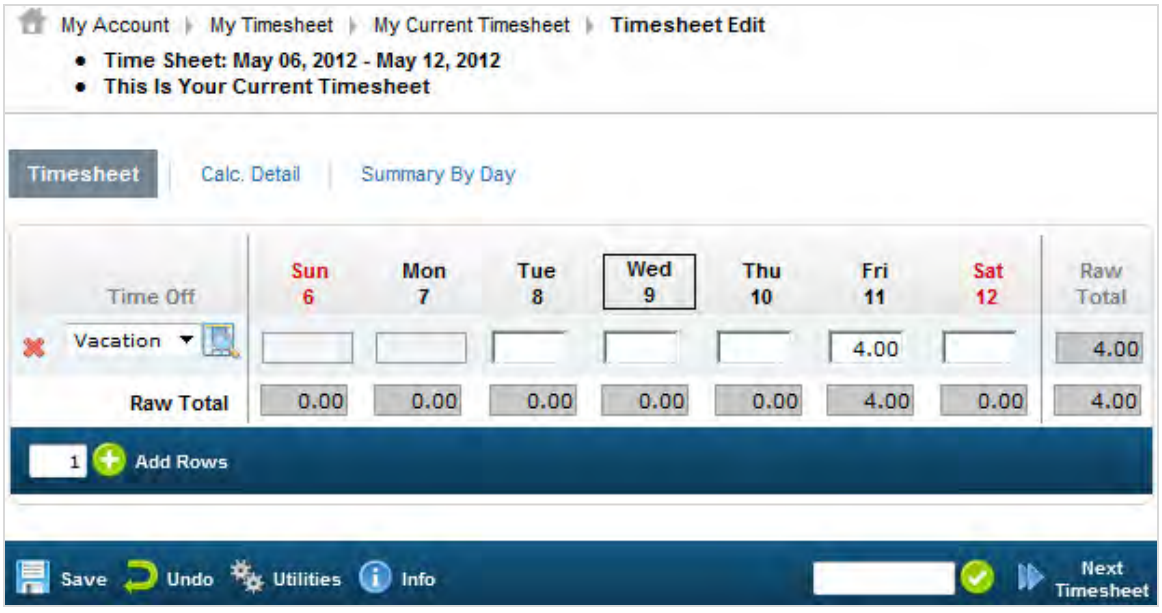


Timesheet Profiles

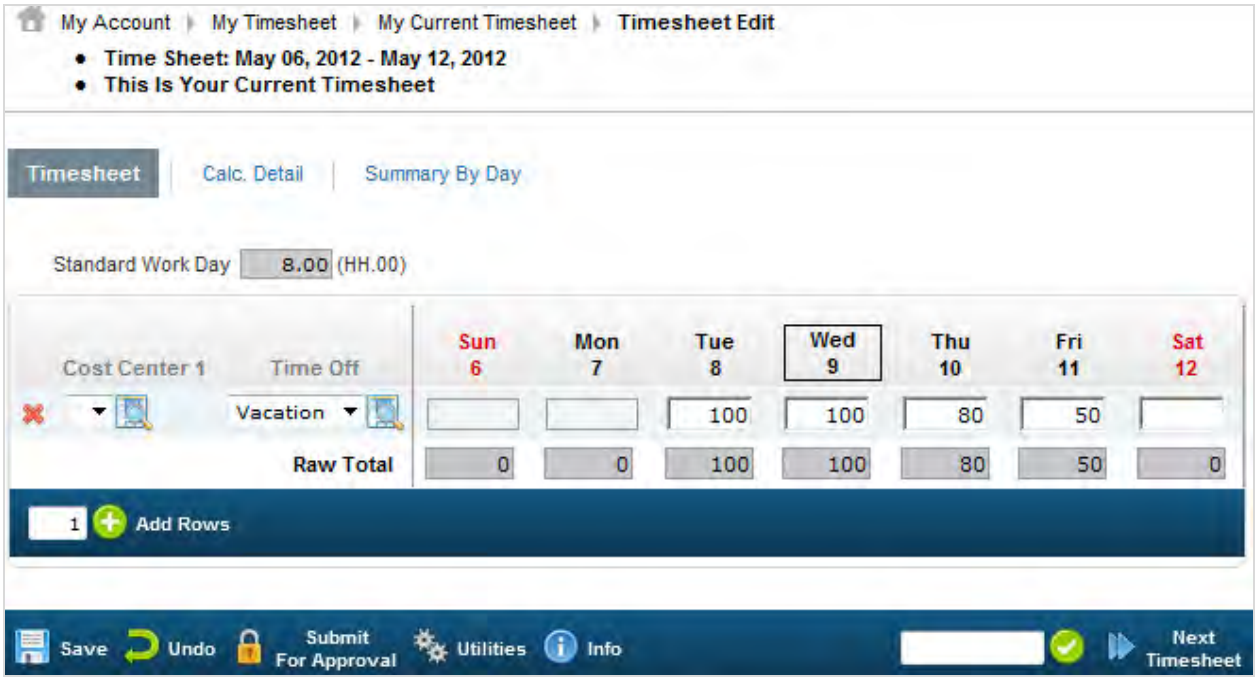
Five default Timesheet Profiles are provided in Web Based Time & Labor Management: **Start/Stop**, **Bulk Hours**, **Time Stamp**, **Start/End All Days** and **Graphical View**. The Timesheet Profile applied to a user account determines the user's timesheet type. You can configure the settings associated with these default Timesheet Profiles, as well as create additional Timesheet Profiles based on these default timesheet types. A description for each default Timesheet Profile is provided below:



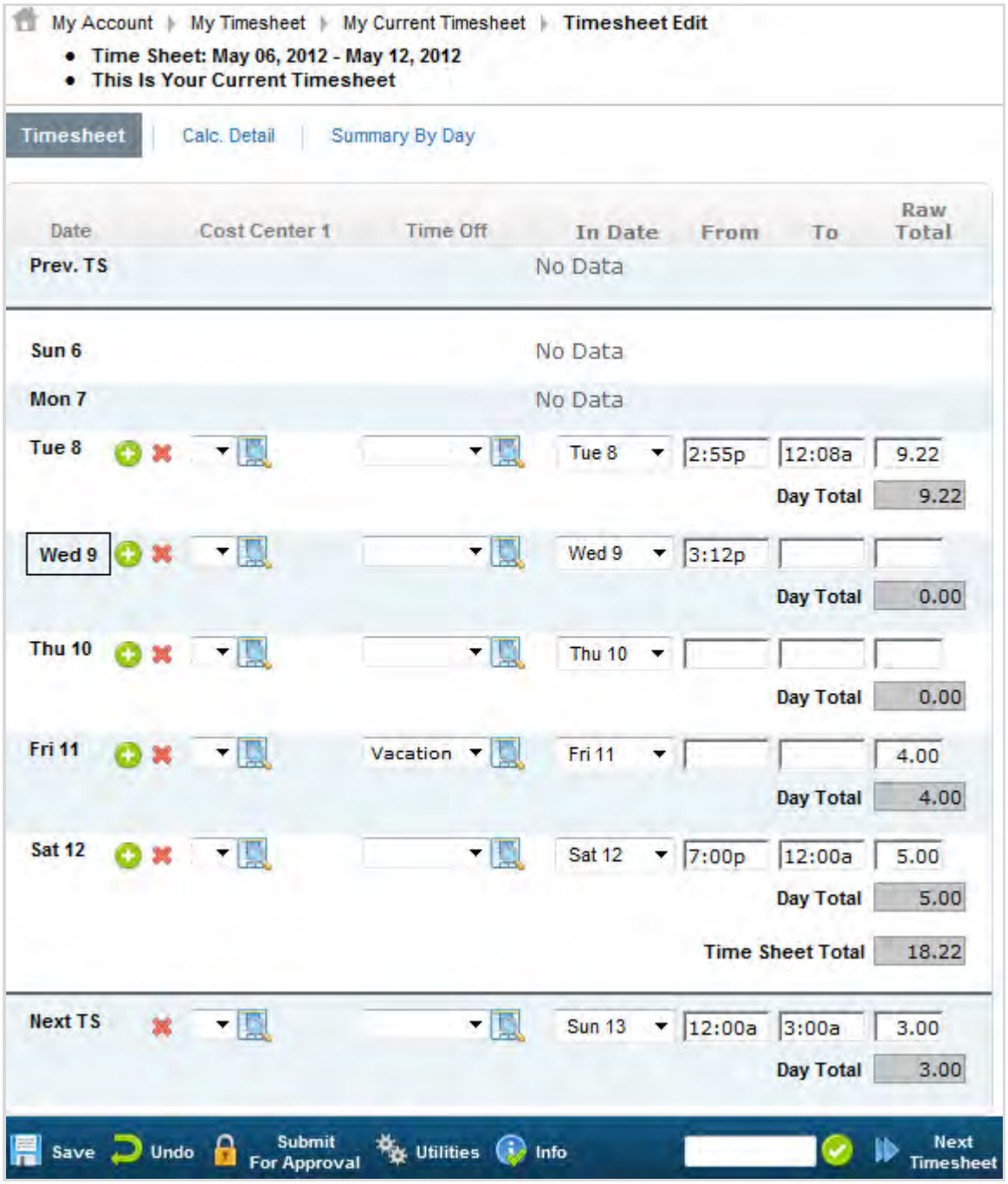
- **Frozen Punches** – similar to the Punch Clock Profile (described below), this profile allows an employee to clock in and out utilizing the clock in/out buttons without the ability to edit the first or last punch of the day. The employee can, however, split the time entry to add additional punches between their first in and last out punch of the day.



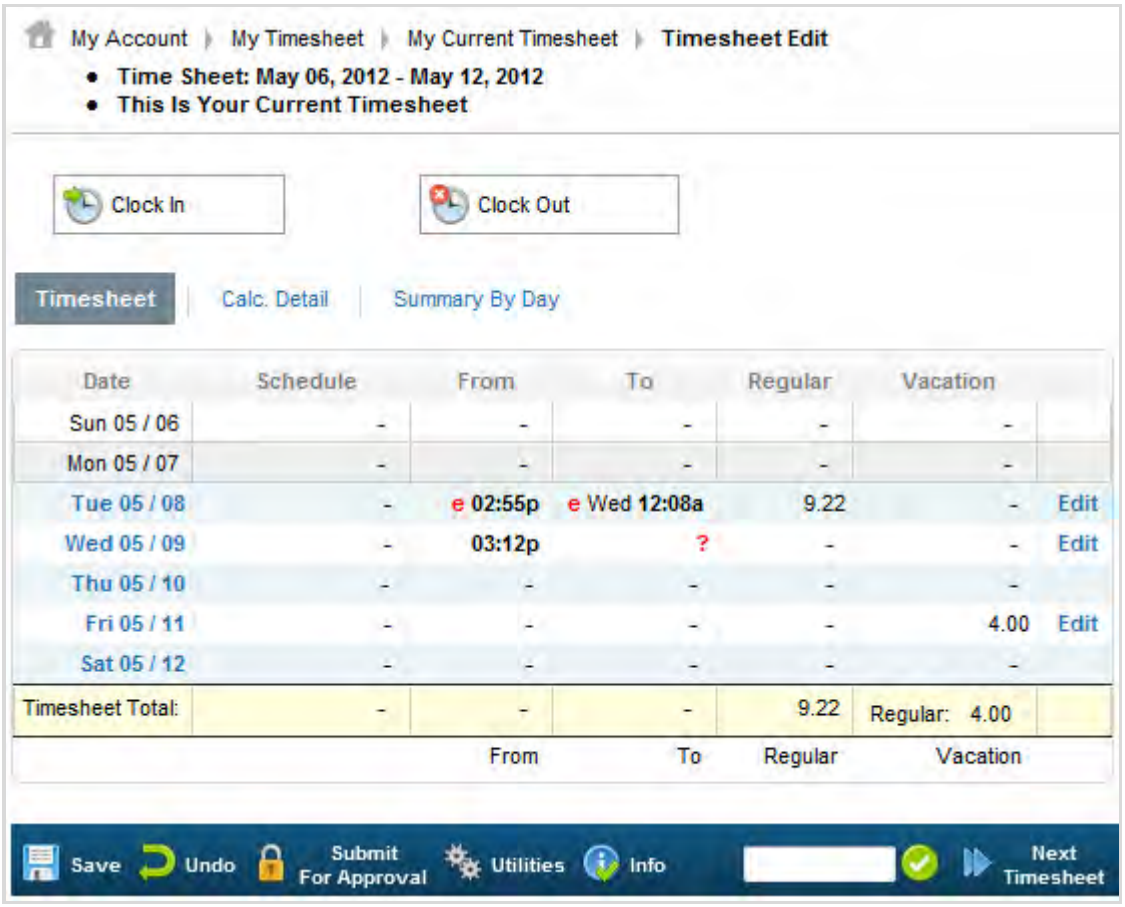
- **Time Off Only –** allows only tracking of time off. Employees with this timesheet profile would not be able to request enter time, or use schedules.



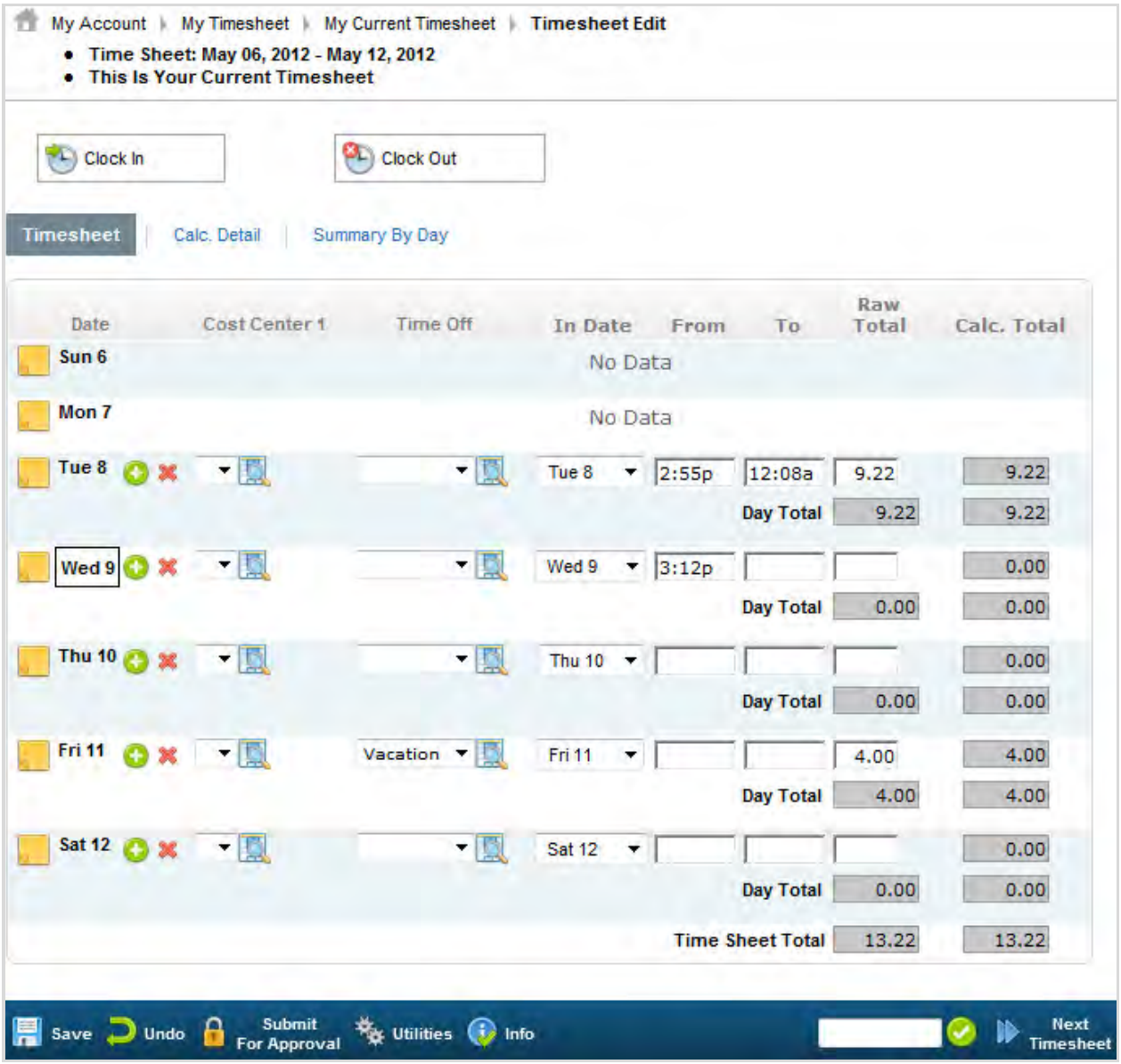
- **Bulk Hours (Percent) –** allows an employee to enter in the percentage of time they are working at or on specific cost centers. The employee's standard workday is defined on the top of this timesheet, and the employee will enter the percentage of their workday spent on each cost center on the appropriate dates. Based on the percentage entered and the employee's standard workday, the system will calculate the total hours the employee worked on a particular day for reporting and payroll export purposes.



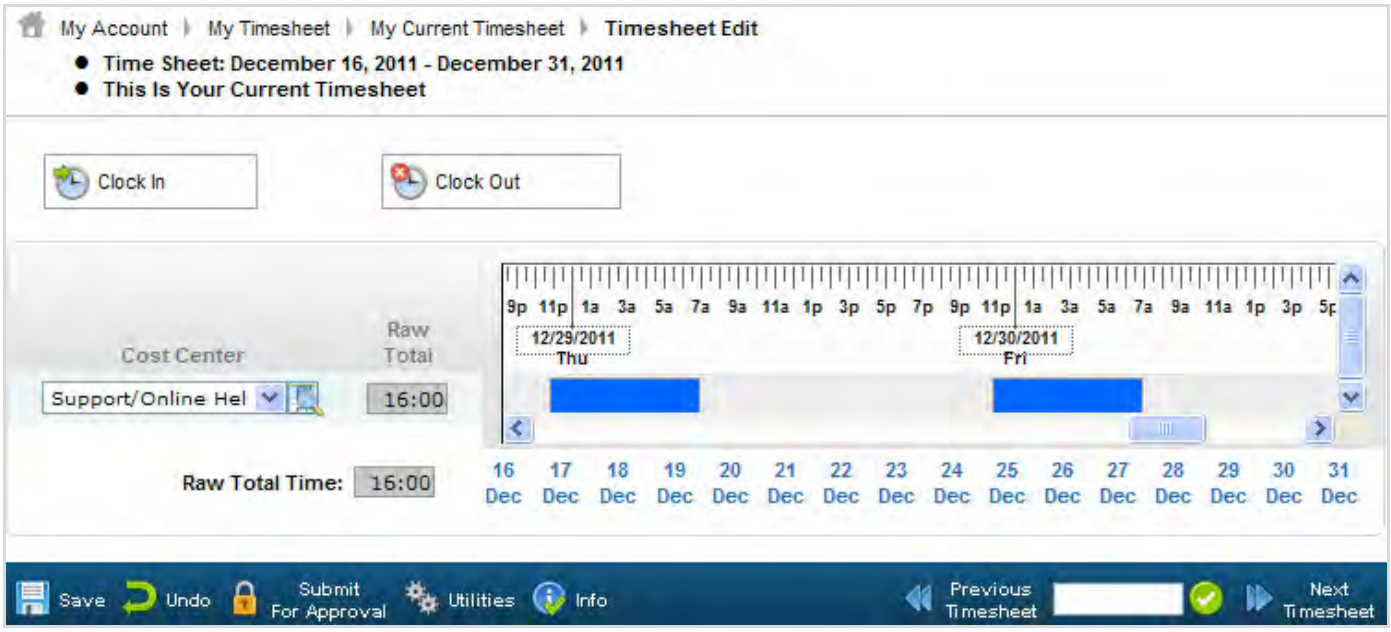
- **Start/End (All Days) With Auto Splits -** allows the same back-end functionality as the Graphical View timesheet, but with the simplified view of the Start/End (All Days) timesheet. The system will perform an automatic split between time entries crossing multiple days, displayed on the Calculated Detailed Tab.



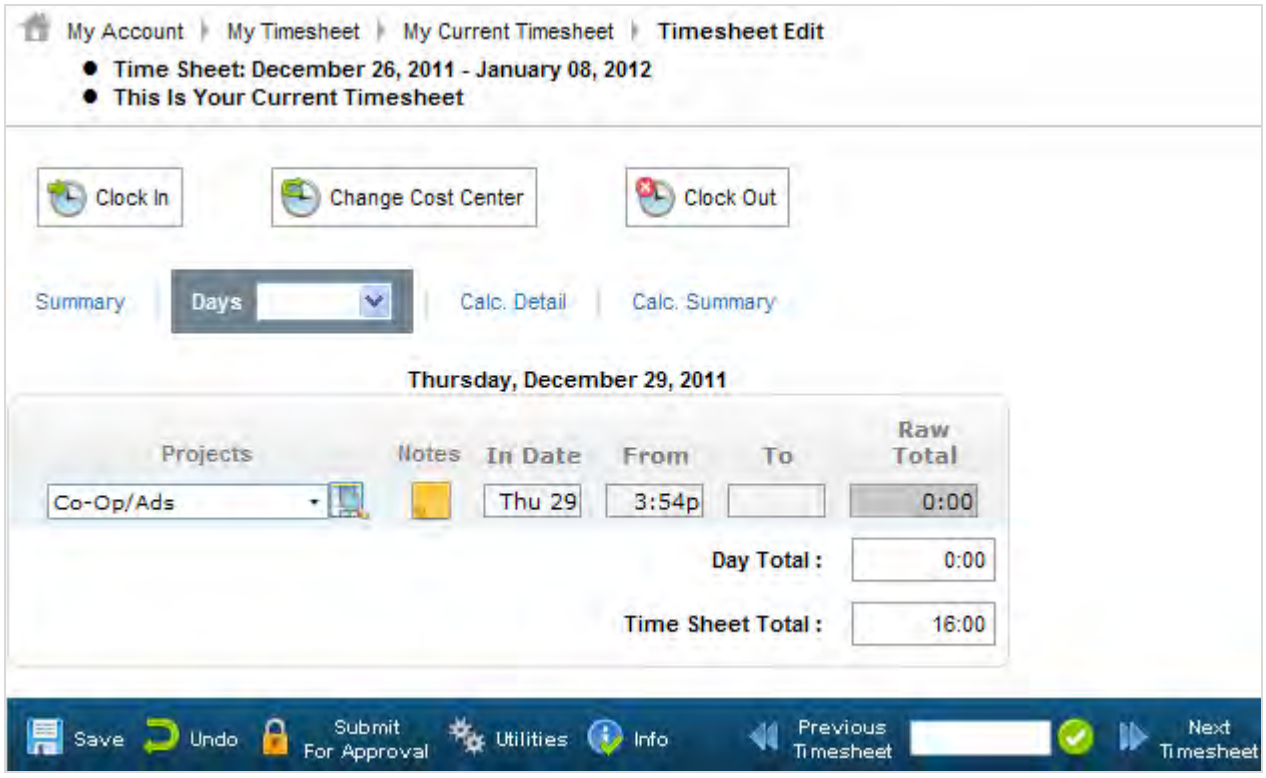
- **Small Business –** this profile has a similar layout of the timesheet within the Small Business Edition, allowing for an even smoother upgrade from SBE to Enterprise, as employees will be able to continue using the same timesheet layout they are used to.



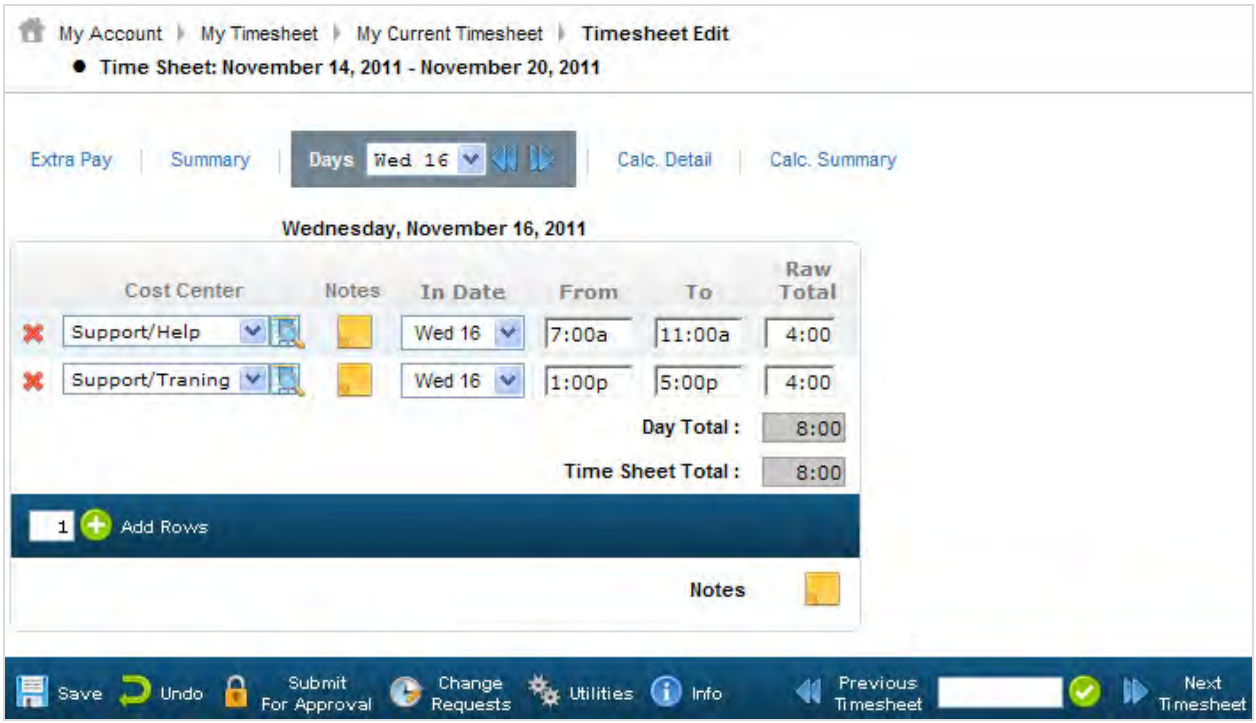
- **Start/End (All Days)** – this profile can take on the properties of a **Punch Clock** or **Start/End** timesheet, but, differs in that the user is able to view all days within a pay period on one screen.



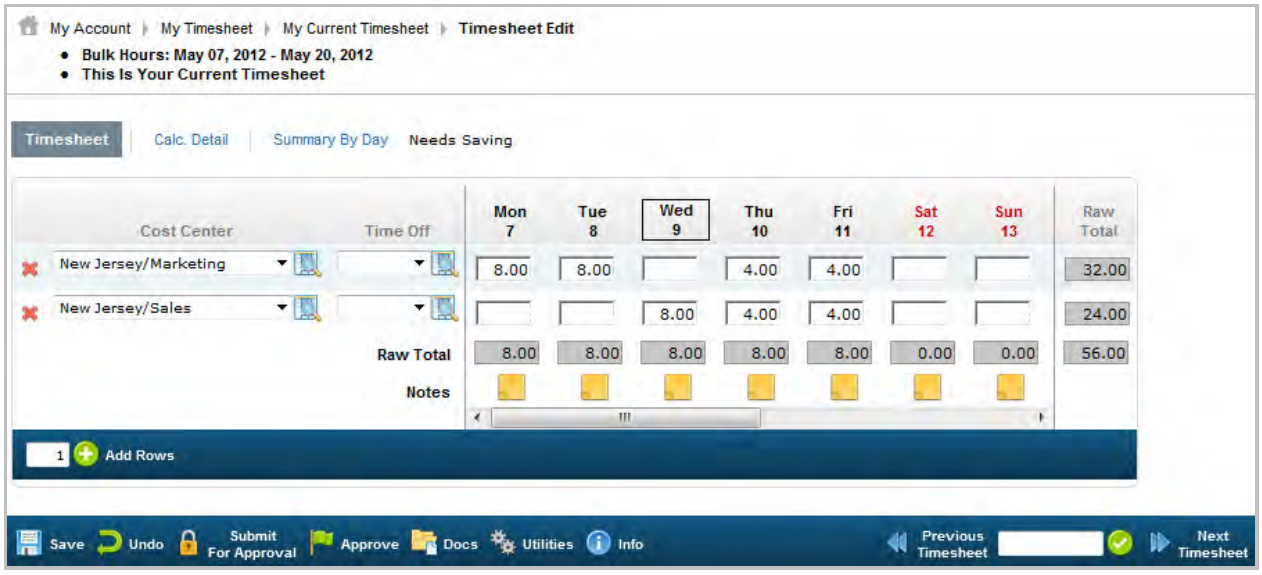
- **Graph -** users are able see their hours in a more visual format which facilitates review, edit, and approval of punches. This format is helpful for employees who work shifts that cross midnight.



- **Punch Clock** - works similar to a physical time clock used to punch in/out. This profile is restrictive in that the employee is prohibited from editing their time. Formerly known as **Time Stamp**.



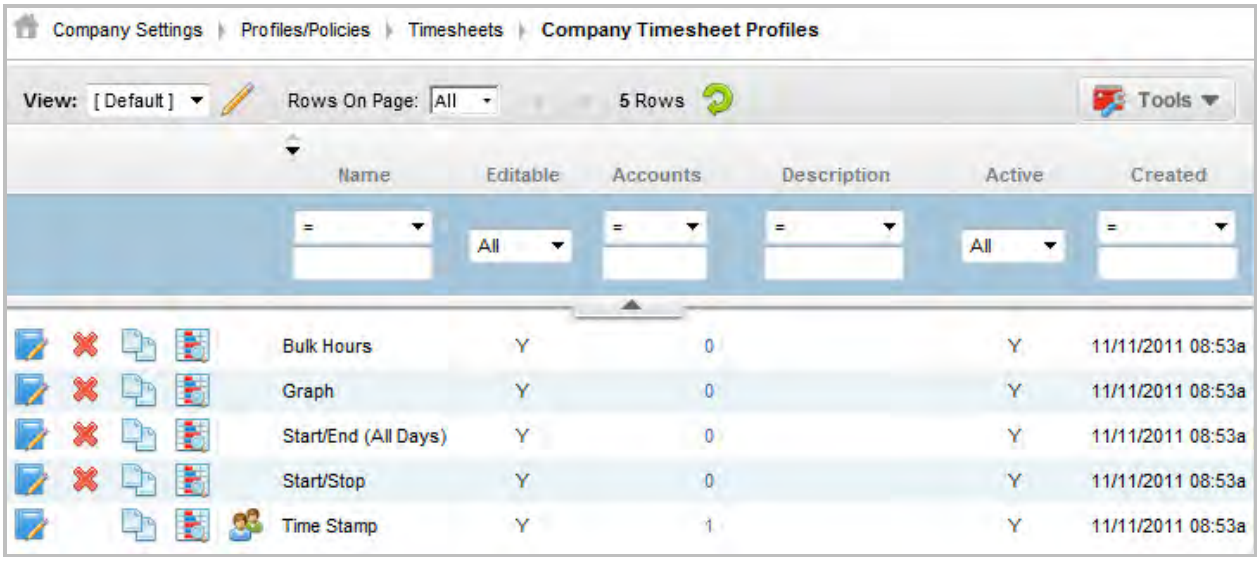
- **Start/End** - allows a user to enter their own start and end times of their workday. This profile is an honor system concept, giving the employee the freedom to edit their timesheet.



- **Bulk Hours -** allows a user to enter time in bulk hours without specifying exact start and end times. This profile is typically enabled for exempt or salaried employees and can be set to auto populate. Piecework can also be enabled.

Creating Timesheet Rules:

7. Go to **Company Settings > Profiles/Policies > Timesheets**. You will then see the following Timesheet Profiles by default:



8. By clicking on the icon, you can add rules to this profile.

9. There are 4 categories of rules: **On Approval, On Populate, On Punch, On Save, and On Submit** as seen below. The rules are designed to work when there is an action in the system, for example, warning an employee if there are missing punches when they ***submit*** their timesheet. Click on the to add a rule to this Timesheet Profile.

   - **On Approval**: when a manager approves an employee's timesheet, the following warnings or errors can be enabled:
     a. **Current or Future Timesheet -** will display an error or warning message if an employee submits a current or future timesheet.
     b. **Incomplete Timesheet -** will display a warning or error when approving an employee's timesheet if there are any missed punches.
     c. **Incomplete Timesheet Based on Advanced Filter -** if an employee has incomplete time entries on their timesheet in any of the fields in the advanced filter, the system will display an error or warning message upon approval of the timesheet.
     d. **Limit Extra Pay Amounts -** ability to specify a minimum and maximum dollar amount that can be entered on the Extra Pay tab of the timesheet.
     e. **Maximum Hours Worked Per Day Exceeded –** allows you to define the maximum number of hours an employee can work within a day.
     f. **Minimum Hours Worked Per Day Not Reached –** allows you to define the minimum number of hours an employee must work within a day.
     g. **Move Time Off Entries to Eliminate Gaps and Overlaps -** will eliminate a time entry gap or overlapping time entry if the time entry is within the defined amount of time between the last/first time entry.
     h. **Piecework is Missing Pay Category –** checks to confirm piecework is tied to a pay category.
     i. **Send Email Notification When Extra Pay is Approved –** when an extra pay entry is approved on an employee's timesheet, a notification will be triggered.
     j. **Time Entries or Time Off Requests After Employee Termination Date –** can be configured to produce a warning or error when a manager attempts to approve an employee's timesheet that contains time entries and/or time off requests populated past their termination date.
     k. **Time Entry Begins or Ends Outside of Timesheet –** if an employee has a time entry including a punch either before or after the timesheet's start or end will generate a warning or an error.
     l. **Time Off Exceeded -** will display an error or warning message when a manager is approving an employee's timesheet if the time off entered will result in a negative accrual balance. You can also

specify that an employee's accrual balance can go negative only up to a certain limit. So, for example, if this is set to -8 hours, if the employee has a time entry on their timesheet that brings their balance below -8 hours, either an error or warning will generate. The message will appear upon approval of the timesheet.

m. **Time Off For Consecutive Work Days** – this will generate a warning or error, and if a Notification is configured, trigger a notification to send in the event an employee has a certain number of consecutive work days off (the number can be configured within the rule).
n. **Time Off Is Not Equal To Employees Schedule or Standard Work Day -** if amount of time off hours entered on timesheet for any given day does not match the employee's scheduled or standard work hours.
o. **Time Off Request Pending -** will display an error or warning message when approving an employee's timesheet if an employee has any unapproved time off requests.
p. **Timesheet Change Requests Pending –** either displays a warning or an error if there is a timesheet change request pending approval.
q. **Verify All Time Entries Are Approved –** this rule will prevent a manager from approving a timesheet if there are unapproved time entries within that timesheet.
r. **Verify Piecework is Separate From Hours –** confirms hours and piecework are separate within the employee's timesheet.
s. **Verify Time Entries Are Not Overlapping –** confirms employee's time entries are not overlapping on the timesheet.

- **On Populate**: when an employee's Timesheet is Populated, the following can be enabled:
  a. **Automatic Cost Center Allocation By Work Day Breakdown** – will allocate a workday breakdown template to the employee's timesheet, if configured in schedules.

- **On Punch**: when an employee Punches in the following warnings or errors can be enabled:
  a. **Automatic Cost Center Allocation by Workday Breakdown –** will allocate a workday breakdown template to the employee's timesheet, if configured in schedules.
  b. **Delete Time Off Entries on Punch In -** will delete the selected time off time off entries when an employee punches in.
  c. **Move Auto Split Punches To Match Schedule –** will automatically process an employee's punches and split them accordingly, without needing to save the timesheet first.
  d. **Remove Autopopulated Time Entries On Punch In -** will delete the pre-populated time entries when an employee punches in.
  e. **Time Between Punches –** allows you to designate a required amount of time an employee must have between their last out and next in punch (i.e. 30 minutes). The system can generate a warning or error.
  f. **Use Punch Code List To Match Cost Centers –** will look to the Punch Code List to ensure punches match the appropriate cost center.
  g. **Verify Time Entries Are Not Overlapping -** confirms employee's time entries are not overlapping on the timesheet.

- **On Save**: when an employee saves their timesheet the following warnings or errors can be enabled:
  a. **Automatic Cost Center Allocation by Workday Breakdown -** will allocate a workday breakdown template to the employee's timesheet, if configured in schedules.
  b. **Change Schedule on Save of Time Off Category** - allows you to determine that an employee's schedule should change upon save of a time off entry.
  c. **Clear Cost Centers on Save of Time Off Category** – will take any cost centers or time entry extra fields enabled within the company that an employee may allocate their time towards (by default or through selection) can be cleared when specific time offs are entered onto the employee's timesheet, either through a time off request approval or manually entering on the timesheet.
  d. **Future Timesheet or Time Entry** – will display an error or warning message if an employee attempts to enter time in the future.
  e. **Incomplete Timesheet -** if an employee has incomplete time entries on their timesheet, then the system will display an error or warning message when saving their timesheet.
  f. **Incomplete Timesheet Based on Advanced Filter -** if an employee has incomplete time entries on their timesheet in any of the fields in the advanced filter, the system will display an error or warning message upon saving of the timesheet.
  g. **Limit Extra Pay Amounts -** ability to specify a minimum and maximum dollar amount that can be entered on the Extra Pay tab of the timesheet.

h. **Limit Time Supervisor Has to Edit Time Entries –** allows the customization of a time frame in which supervisors can edit employee's time.
i. **Match Adjustment Total to Day Total –** when the Adjustment Tab is enabled, this rule will work in conjunction with it to give employees the ability to allocate bulk hours between frozen in and out punches.
j. **Maximum Hours Worked Per Day Exceeded –** allows you to define the maximum number of hours an employee can work within a day.
k. **Maximum Time Entered by Pay Category –** allows you to define the maximum number of hours an employee can work within a week, month, pay period, or year within a certain pay category or pay categories.
l. **Maximum Time Off by Type -** can be configured to limit a specific number of hours entered within a certain time off per week, month, pay period, or year.
m. **Merge Time Entries –** allows you to merge time entries that are consecutive bulk entries with the same characteristics (shifts, cost centers, etc.)
n. **Move Time Off Entries to Eliminate Gaps and Overlaps** - will eliminate a time entry gap or overlapping time entry if the time entry is within the defined amount of time between the last/first time entry.
o. **Piecework is Missing Pay Category –** checks to confirm piecework is tied to a pay category.
p. **Send Email Notification When Exception is Created –** when an exception is created on the employee's timesheet, a notification will be triggered.
q. **Send Email Notification When Extra Pay is Added** – when an extra pay entry is added on an employee's timesheet, a notification will be triggered.
r. **Set Cost Centers by Pay Category –** when configured, can assign a specific Cost Center when certain Pay Categories are on the employee's timesheet.
s. **Time Between Punches –**
t. **Time Entry Begins or Ends Outside of Timesheet –** if an employee has a time entry including a punch either before or after the timesheet's start or end will generate a warning or an error.
u. **Time Off Allocated to Default Cost Center -** automatically allocates time off to an employee's default cost center.
v. **Time Off Allocated to Specific Cost Center –** automatically allocates time off to a specified cost center.
w. **Time Off Exceeded -** will display an error or warning message if an employee enters time off that will result in a negative accrual balance when an employee saves their timesheet. You can also specify that an employee's accrual balance can go negative only up to a certain limit. So, for example, if this is set to -8 hours, if the employee has a time entry on their timesheet that brings their balance below -8 hours, either an error or warning will generate. The message will appear upon saving of the timesheet, when the request is submitted, or when the manager tries to approve the request.
x. **Time Off is Not Equal to Employees Schedule or Standard Work Day** - if amount of time off hours entered on timesheet for any given day does not match the employee's scheduled or standard work hours.
y. **Verify Piecework is Separate From Hours** – confirms hours and piecework are separate within the employee's timesheet.
z. **Verify Time Entries Are Not Overlapping** – confirms employee's time entries are not overlapping on the timesheet.
aa. **Verify Time Off Entered in Increments** – confirms employee's time entries are not entered in increments defined within the rule.

- **On Submit**: when an employee submits their timesheet the following warnings or errors can be enabled:
  a. **Automatic Cost Center Allocation by Workday Breakdown** - will allocate a workday breakdown template to the employee's timesheet, if configured in schedules.
  b. **Current or Future Timesheet** - will display an error or warning message if an employee submits a current or future timesheet.
  c. **Incomplete Timesheet** - if an employee has incomplete time entries on their timesheet, then the system will display an error or warning message upon submission of their timesheet.
  d. **Incomplete Timesheet Based on Advanced Filter –** if an employee has incomplete time entries on their timesheet in any of the fields in the advanced filter, the system will display an error or warning message upon submission of the timesheet.
  e. **Limit Extra Pay Amounts** - ability to specify a minimum and maximum dollar amount that can be entered on the Extra Pay tab of the timesheet.

f. **Maximum Hours Worked Per Day Exceeded –** allows you to define the maximum number of hours an employee can work within a day.
g. **Merge Time Entries –** allows you to merge time entries that are consecutive bulk entries with the same characteristics (shifts, cost centers, etc.)
h. **Minimum Hours Worked Per Day Not Reached –** allows you to define the minimum number of hours an employee must work within a day.
i. **Move Time Off Entries to Eliminate Gaps and Overlaps –** will eliminate a time entry gap or overlapping time entry if the time entry is within the defined amount of time between the last/first time entry.
j. **Piecework is Missing Pay Category –** checks to confirm piecework is tied to a pay category.
k. **Send Email Notification When Extra Pay is Submitted** – when an extra pay entry is submitted on an employee's timesheet, a notification will be triggered.
l. **Time Entry Begins or Ends Outside of Timesheet –** if an employee has a time entry including a punch either before or after the timesheet's start or end will generate a warning or an error.
m. **Time Off Exceeded** - will display an error or warning message if an employee enters time off that will result in a negative accrual balance. You can also specify that an employee's accrual balance can go negative only up to a certain limit. So, for example, if this is set to -8 hours, if the employee has a time entry on their timesheet that brings their balance below -8 hours, either an error or warning will generate. The message will appear upon submission of their timesheet.
n. **Time Off is Not Equal to Employees Schedule or Standard Work Day -** if amount of time off hours entered on timesheet for any given day does not match the employee's scheduled or standard work hours.
o. **Time Off Request Pending -** either displays an error message or a warning message if an employee has unapproved time off requests. The message will appear upon submission of their timesheet.
p. **Timesheet Change Request Pending –** either displays a warning or an error if there is a timesheet change request pending approval.
q. **Verify Piecework is Separate from Hours –** confirms hours and piecework are separate within the employee's timesheet.
r. **Verify Time Entries Are Not Overlapping –** confirms employee's time entries are not overlapping on the timesheet.
s. **Maximum Time Entered by Pay Category –** can be configured to limit a specific number of hours entered within a certain pay category per week, month, pay period, or year.
t. **Maximum Time Off by Type -** can be configured to limit a specific number of hours entered within a certain time off per week, month, pay period, or year.

10. Navigate between the Timesheet Profile and Timesheet Profile Rules by clicking on the **View/Edit Profile** button (when you are in the Rules screen) or **View/Edit Rules** button (when you are in the Profile screen) on the right of your navigation bar.

To create a new Timesheet Profile:

When creating a new Timesheet Profile, you must select the default Timesheet type on which it is based.

1. Select **Company Settings > Profiles/Policies > Timesheets**. The **Company Timesheet Profiles** screen will display. Click the

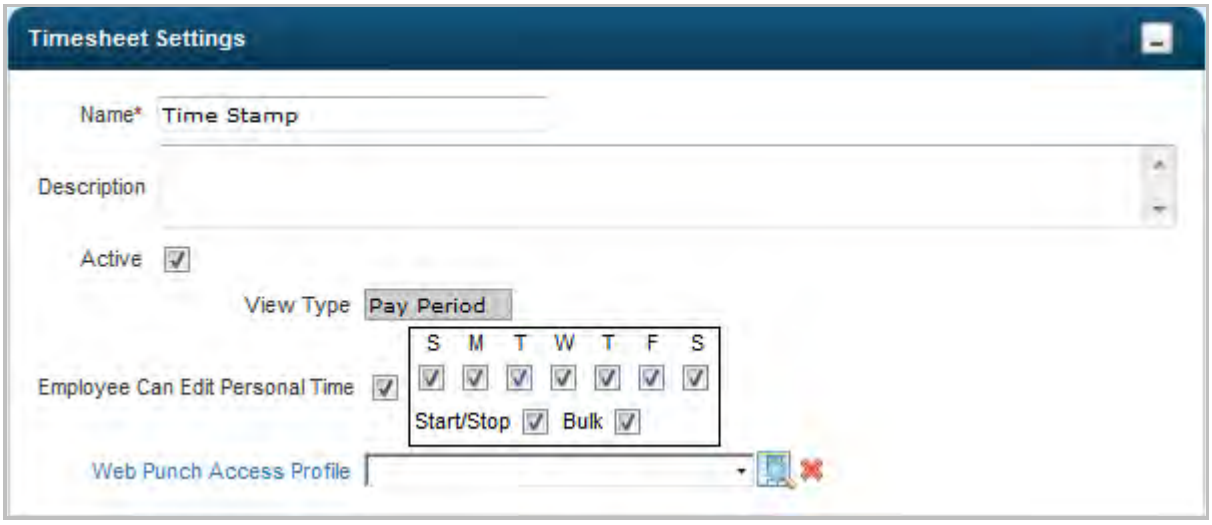
button.
2. From the **Available Time Sheet Types** screen, click the button that corresponds to the timesheet type on which you want to base the new Timesheet Profile.
3. Enter the properties of the Timesheet Profile, and then click the

button.

To edit a Timesheet Profile:

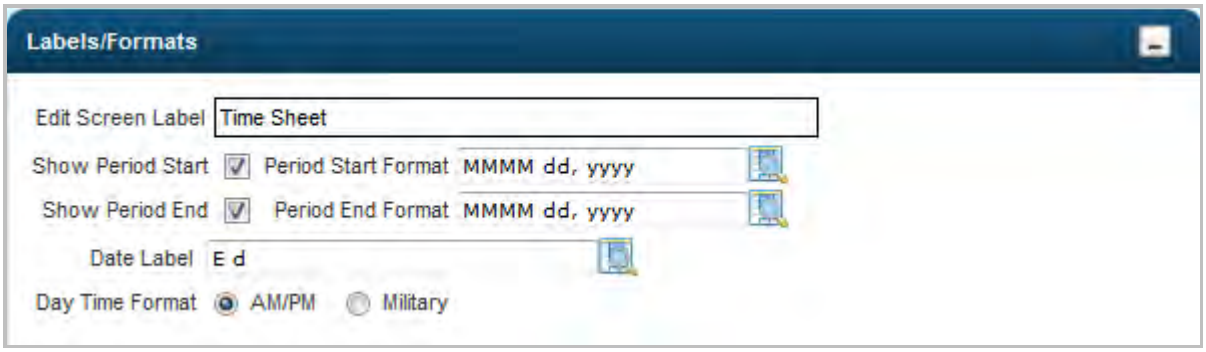
The following section describes each setting as displayed within a timesheet profile.

Timesheet Settings



1. **Name -** name for the Timesheet Profile.
2. **Description -** brief description about the Timesheet Profile.
3. **View Type -** period of time that the profile displays.
4. **Employee Can Edit Time -** checking this box allows an employee to edit their start/stop or bulk hours on their timesheet. Un-checking this box prevents an employee from editing their timesheet.
5. **Web Punch Access Profile** - use the icon to select an access profile that would restrict an employee from clocking in outside of the specific range of IP addresses.

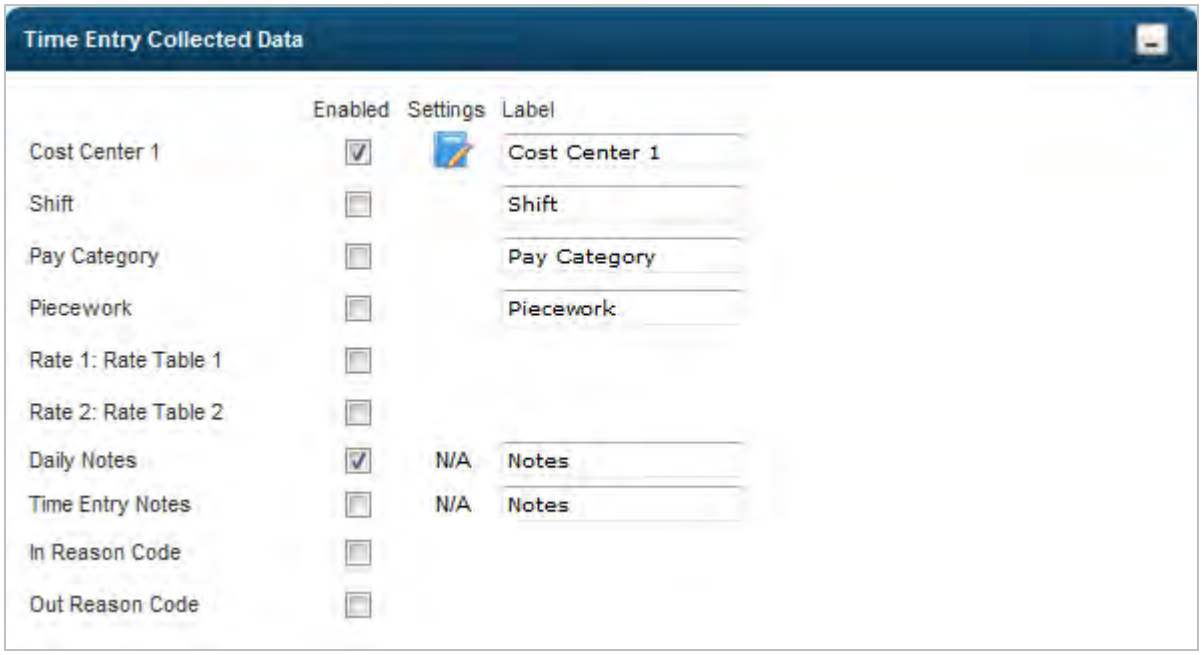
Labels/Formats



1. **Edit Screen Label** - heading label that will appear at the top of the Timesheet screen.
2. **Show Period Start, Period Start Format** - click the check box to display the start date of the pay period in the Header area of the timesheet. Then, specify the format that should be used to display the start date in the Period Start Format field. Click the button to select from different date formats.
3. **Show Period End, Period End Format** - click the check box display the end date of the pay period in the Header area of the timesheet. Then specify the format that should be used to display the end date in the Period End Format field. Click the button to select from different date formats.
4. **Date Label** - specify the date format for date entries on the timesheet.

5. **Day Time Format AM/PM, Military** - this setting controls how time should appear on the timesheet. Select the button for the **Day Time Format** you want to apply; the options are AM/PM (5:00 PM) or Military (17:00).

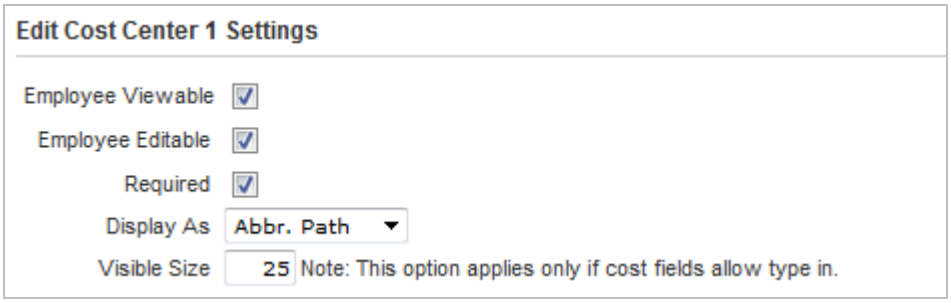
Time Entry Collected Data



The screen above determines how hours are collected on an employee's timesheet.

1. **Cost Center 1-10 -** allows you to allocate time to a specific cost center. In the example above, only one tree has been enabled for this company, however if multiple trees are enabled you would have the option to allocate time towards those cost centers.
2. **Shift** - allows you to manually allocate time to a specific shift. Automatic shift calculations can also be done through Pay Calculations.
3. **Pay Category** - allows you to manually allocate time to a specific Pay Category. Automatic calculation of overtime and double time can also be done through Pay Calculations. If you choose to make this field editable by an employee, you will then be able to limit which category the employee and manager (at different levels) are able to edit on the timesheet.
4. **Piecework** - allow you to track pieces on the timesheet. Example: 200 miles or 10 pages. Enabling this functionality would allow rates to be applied per piece.
5. **Rate Table –** if rates are enabled, allows you to override the assigned hourly rate directly on the employee's timesheet.
6. **Daily Notes** - enables notes for each day on a timesheet. Notes are reportable upon and can be viewed by both the employee and managers.
7. **Time Entry Notes** - enables notes for time entry on a timesheet. Notes are reportable upon and can be viewed by both the employee and managers.
8. **In Reason Code** - prompts the employee for a reason why they are punching in.
9. **Out Reason Code** - prompts the employee for a reason why they are punching out.

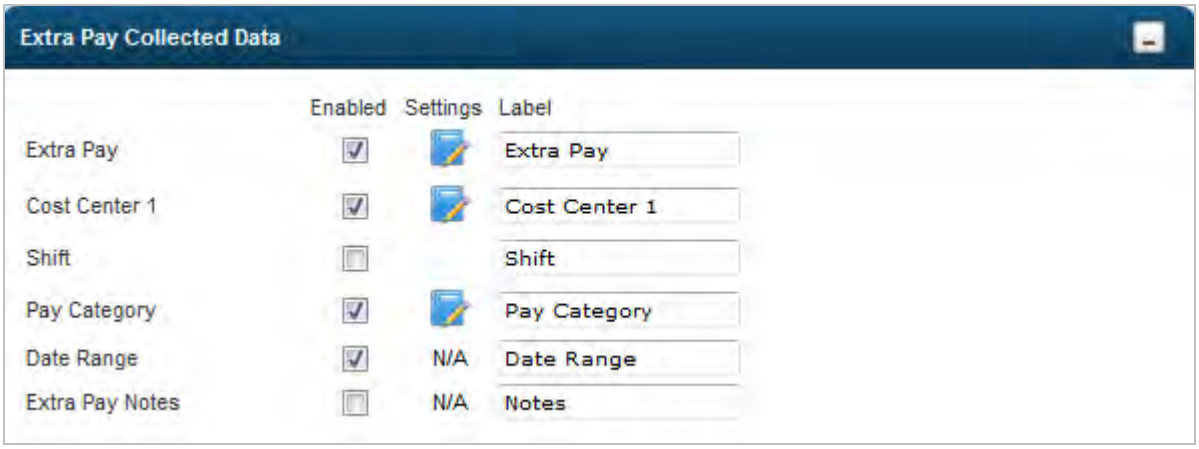
Checking the **Enabled** checkbox allows you to collect data based on the category that is enabled. Once enabled, click the Settings button to edit the settings of that field.



1. **Edit Settings**
   - **Employee Viewable** - allows the employee to view the cost center.
   - **Employee Editable** - allows the employee to edit the cost center they are allocating time to.
   - **Required** - requires that an employee choose a cost center, working in conjunction with the Incomplete Timesheet Rule.
   - **Display As** - shows display for name of cost center for an employee to choose from.
   - **Visible Size** - amount of characters shown for name in display.

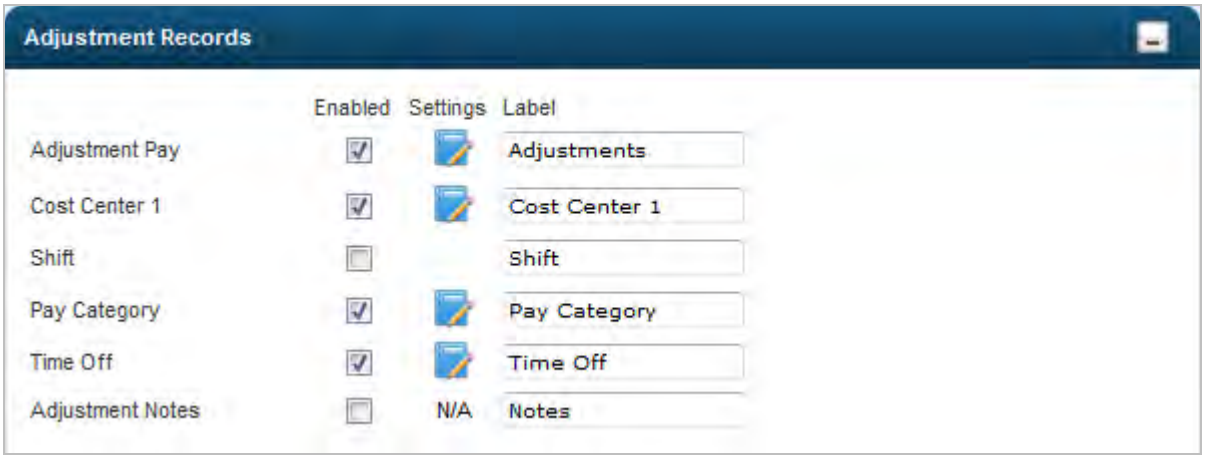
Extra Pay Collected Data

The screen above determines how dollars are collected on an employee's timesheet. You can also determine what is enabled, edit the settings and label what you would like to call the extra pay data.



1. **Extra Pay -** enables the ability to track dollars on the employee's timesheet.
2. **Cost Center 1 -** allows you to allocate dollars to a specific cost center. In the example above, only one tree has been enabled for this company called Department, however if multiple trees are enabled you would have the option to allocate dollars towards those cost centers.
3. **Shift** - allows you to manually allocate dollars to a specific shift.
4. **Pay Category** - allows you to manually allocate dollars to a specific Pay Category.
5. **Date Range** – allows you to enter a date range for the dollar amounts entered, that do not necessarily have to correspond to the pay period dates that the dollars are entered on.
6. **Extra Pay Notes** - enables notes for extra pay entries. Notes are reportable upon and can be viewed by both the employee and managers.

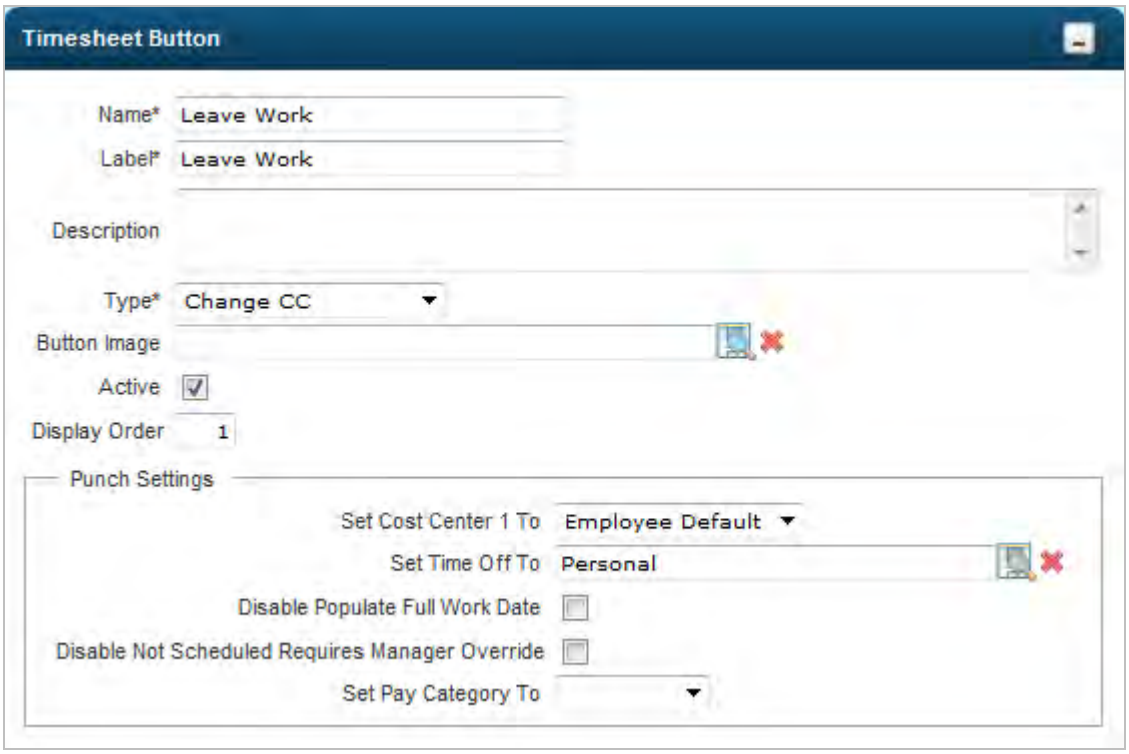
Adjustment Records



1. **Adjustment Pay** - allows the employee to ether view or edit adjustments to their time sheet if enabled.
2. **Cost Center 1 -** allows you to allocate adjustments to a specific cost center. In the example above, only one tree has been enabled for this company, however if multiple trees are enabled you would have the option to allocate dollars towards those cost centers.
3. **Shift** - allows you to manually allocate adjustments to a specific shift.
4. **Pay Category** - allows you to manually allocate adjustments to a specific Pay Category.
5. **Time Off -** allows you to manually allocate time towards specific Time Off categories.
6. **Adjustment Notes** - enables notes for adjustments. Notes are reportable upon and can be viewed by both the employee and managers.

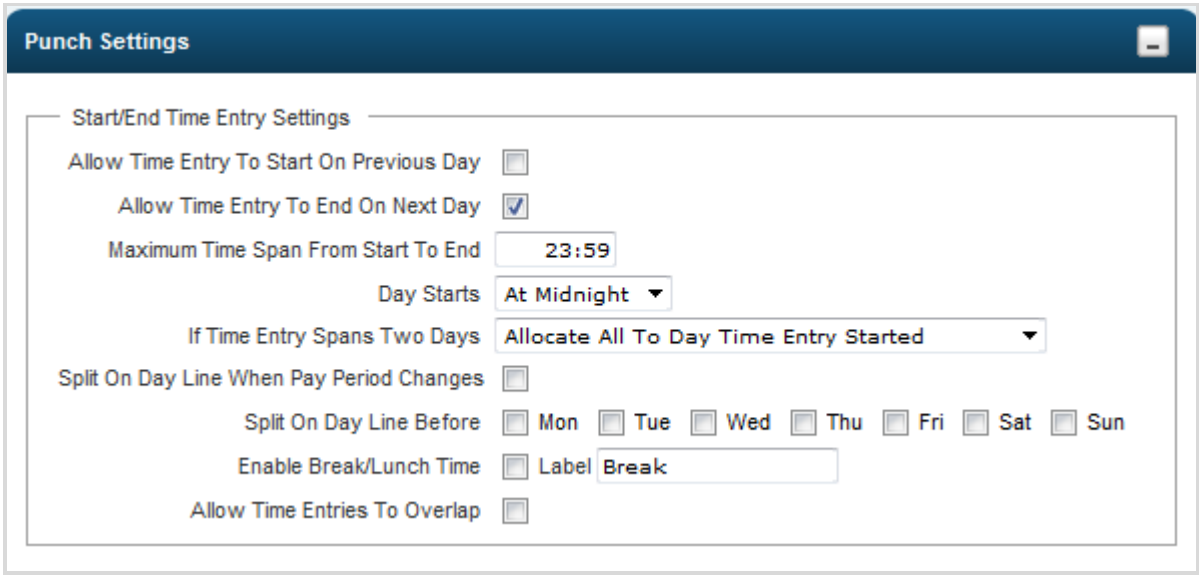
NOTE: All Timesheet Profile types have the ability to allocate bulk hours between frozen (punches that cannot be edited) in and out punches. The Adjustment Records will need to be enabled, and marked as employee viewable and editable. Additionally, a Timesheet Rule will need to be added for Match Adjustment Total to Day Total.

Adding Additional Timesheet Buttons

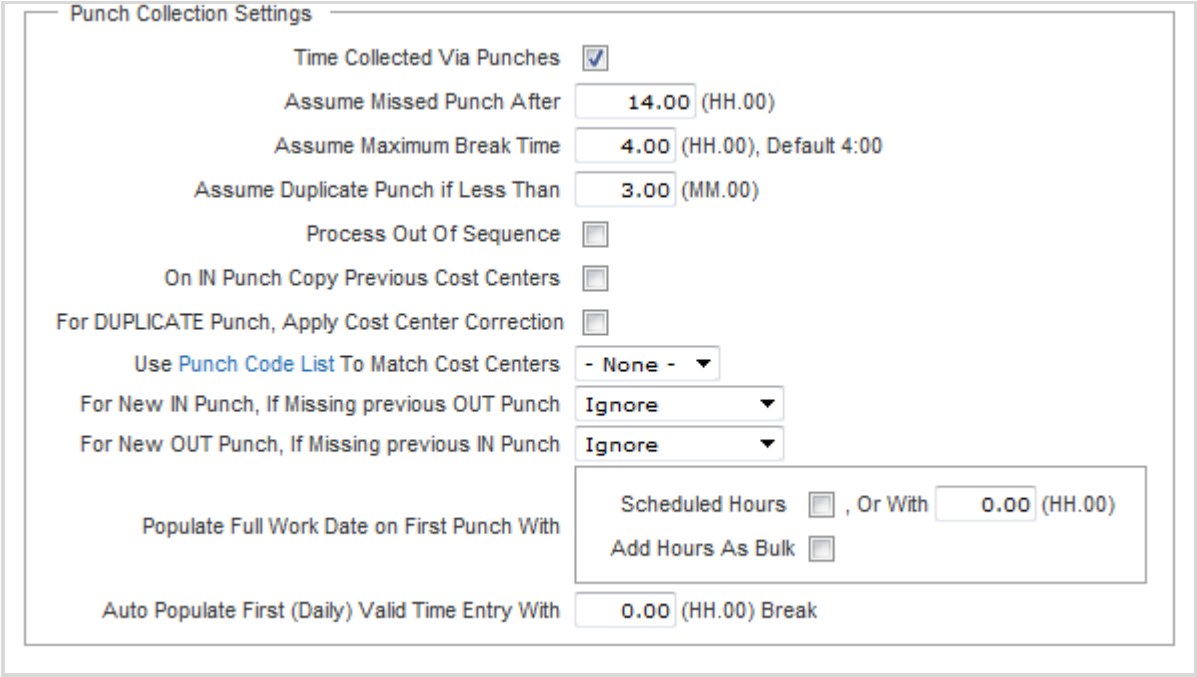


1. **Define Custom Buttons to appear on employee's timesheet** – click on **View Button** on the navigation bar to create custom buttons similar to **Clock In**, **Clock Out**, and **Change Cost Center**.
2. Once enabled, the setting can then be edited within the **Punch Settings**

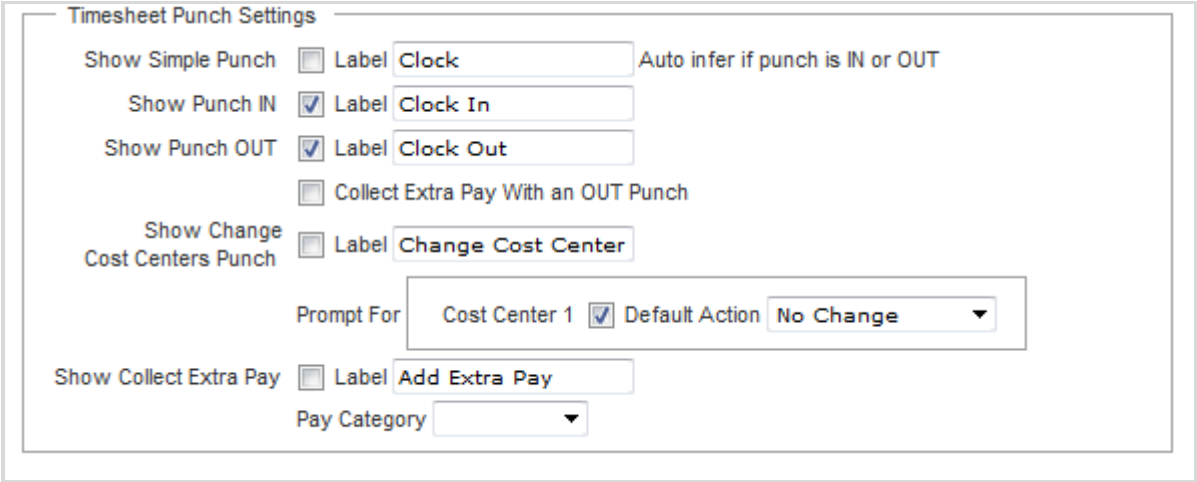
Punch Settings



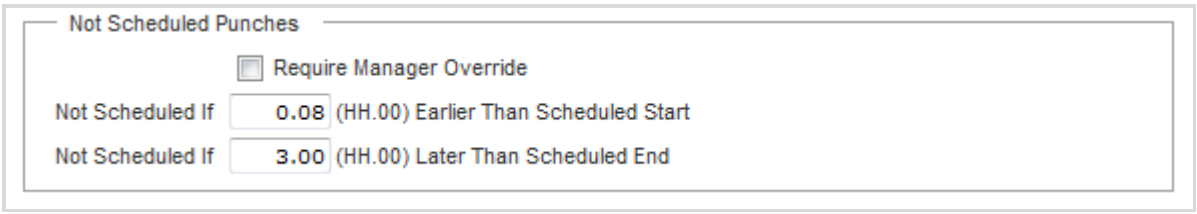
1. **Allow Time Entry to Start on Previous Day -** enables the display of the **In Date** column on the timesheet, allowing you to edit the day when the employee's punch is allocated to.
2. **Allow Time Entry To End On Next Day** - enables the display of the **In Date** column on the timesheet, allowing you to edit the day when the employee's punch is allocated to.
3. **Maximum Time Span From Start To End** – allows you to specify the maximum length of time that may occur between two punches.
4. **Day Starts [At Midnight, Prev. Day, Same Day] -** allows you to define specifically when midnight should take place. Example: setting is applicable to a client whose day starts at 7:00AM.
5. **If Time Entry Spans Two Days [ ] -** allows you to specify what should happen when a time entry crosses midnight. You have the option to allocate all to day time entry started, allocate all to day time entry ended, split between two days, or split between two days based on the time entry's start.
6. **Split on Day Line when Pay Period Changes –** if a pay period crosses a timesheet, the system will add a line to designate the different pay periods.
7. **Split on Line Day Before –** allows you to add a line split for a specific day of the week.
8. **Enable Break/Lunch Time -** enables a column on the timesheet where an employee can enter in a bulk time entry for their break or lunch. Example: the employee can enter in .5 in this column for the 30-minute lunch they took. The Label allows you to provide a header for this column.
9. **Allow Time Entries To Overlap** - the system will allow an employee to have time overlapping on their timesheet.



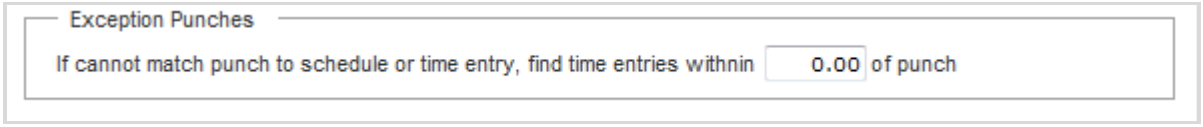
10. **Time Collected Via Punches** - the employee's time is collected through punches via the web or the hardware device.
11. **Assumed Missed Punch After** - the system will assume that the employee has missed a punch after a certain amount of time.
12. **Assume Maximum Break Time** - the system will assume that any hours worked with greater than X hours of break time in between, are two separate shifts.
13. **Assume Duplicate Punch if Less Than** - the system will assume that a punch is a duplicate punch if punches occur within a certain amount of time.
14. **Process Out Of Sequence** - used specifically for modem base hardware devices where an employee will punch in on one device and out on another. The system will reprocess the punches so they appear in chronological order.
15. **On IN Punch Copy Previous Cost Centers -** this allows employee's previously selected cost centers to automatically copy over to their new timesheet.
16. **For DUPLICATE Punch, Apply Cost Center Correction** - the system can override an error made by an employee when changing cost centers. Example: an employee punches into Cost Center A, and switches into Cost Center B, by mistake. To fix this, she then changes cost center again to Cost Center C. The system will then correct the cost center from a duplicate punch. Therefore, the system will see the 2nd change cost center come through (within the assume duplicate punch timeframe) and correct the punches automatically.
17. **Use Punch Code List to Match Cost Centers** - applies a Punch Code Table to any employee's punches as they come in from a hardware device.
18. **For New IN Punch, If Missing previous OUT Punch [Ignore, Show Warning, Show Error]** - the system can show a warning an error if an employee clicks the clock in button while already punched in.
19. **For New OUT Punch, If Missing previous IN Punch [Ignore, Show Warning, Show Error] -** the system can show a warning an error if an employee clicks the clock out button while already punched out.
20. **Populate Full Work Date on First Punch With -** allows an employee to punch in on a clock only once, and populate timesheet with their scheduled hours, with X number of hours, or a set bulk amount of hours.
21. **Auto Populate First (Daily) Valid Time Entry With [ ] (HH:MM) Break -** populates the employee's first time entry with a specified break time. This setting can now be accomplished through Pay Calculations.



22. **Show Simple Punch -** this enables the clock in, out, and change cost center buttons to be one on the employee's timesheet.
23. **Show Punch IN -** this enables the clock **in** button on the employee's timesheet.
24. **Show Punch OUT -** this enables the clock **out** button on the employee's timesheet.
25. **Show Change Cost Center Punch Button** - the system will display the change cost center button on the employee's timesheet. Allows the employee to change departments, job, location, etc. without losing any minutes.
26. **Prompt For** – allows you to specify which cost center(s) should be prompted when the employee clocks in, and also what should happen if no selection is made.
27. **Show Collected Extra Pay** - this enables the extra pay button the employee's timesheet for easy dollar amount entry.

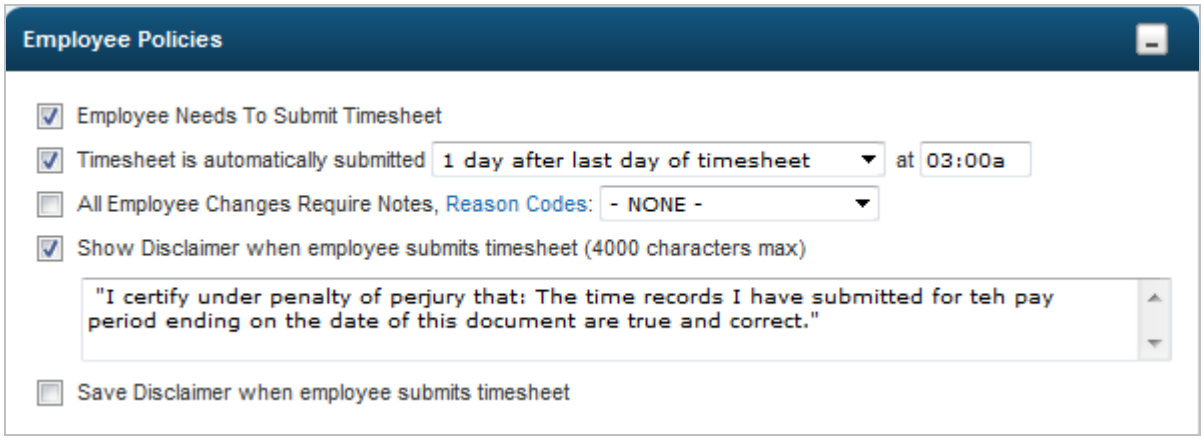


28. **Requires Manager Override** - forces a manager to override a punch by an employee prior to scheduled time. This setting is applicable to web based time collection and on some hardware devices. Please contact your Application Specialist for options regarding schedules on hardware devices.
29. **Not Scheduled If (HH.00) Earlier Than Scheduled Start** - allows you to restrict an employee from punching IN prior to their scheduled time.
30. **Not Scheduled If (HH.00) Later Than Scheduled End** - allows you to restrict an employee from punching OUT after their scheduled time.



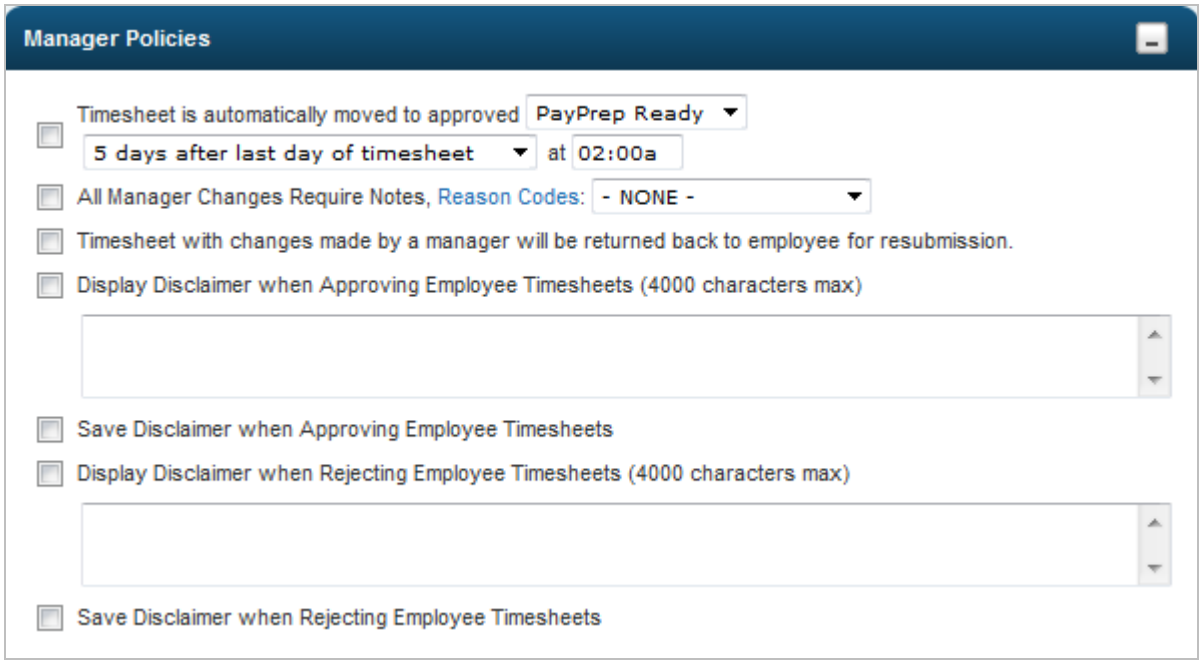
31. **If Cannot Match Punch to Schedule or Time Entry, Find Time Entry Within [ ] of punch** – if a punch is too far from the employee's scheduled time, the system can look within a specified time frame to associate that punch with the closest punch.

Employee Policies



1. Employee Needs To Submit Timesheet - **enables the submit timesheet button for the employee.**
2. Timesheet is automatically submitted - enables the system to automatically submit an employee's timesheet after a defined amount of time from the end of the pay period.
3. All Employee Changes Require Notes, Reason Codes - enables the system to prompt the employee to enter a reason when editing their timesheet.
4. Show Pay Calculations Summary Tabs To The Employee - enables the pay calculations tabs to be shown to the employee allowing them to see how time is calculated (rounding, overtime, lunch deductions).
5. Show Disclaimer when employee submits timesheet - allows you to display a disclaimer when an employee is submitting their timesheet.
6. Save Disclaimer when employee submits timesheet - allows you to save a disclaimer for an employee submitting their timesheet.

Manager Policies



1. **Timesheet is automatically moved to approved -** moves a timesheet to a new level of approval after a selected amount of time has passed
2. **All Manager Changes Require Notes, Reason Codes -** any changes made by a manager will require a reason code be entered.
3. **Timesheet with changes made by a manager will be returned back to employee for resubmission -** if a manager edits an employee's timesheet it will be sent back to the employee for resubmission.
4. **Display Disclaimer when Approving Employee Timesheets -** allows you to display a disclaimer when a manager either approves an employee's time sheet.
5. **Save Disclaimer when Approving Employee Timesheets -** allows you to save a disclaimer for an employee when approving their timesheet.
6. **Display Disclaimer when Rejecting Employee Timesheets -** allows you to display a disclaimer when a manager rejects an employee's time sheet.
7. **Save Disclaimer when Rejecting Employee Timesheets -** allows you to save a disclaimer for an employee when rejecting their timesheet.

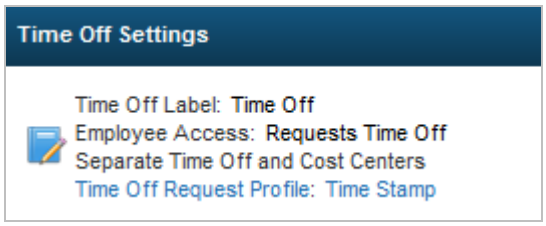
Change Requests Employee Can Perform

1. **Add Punch In –** allows employees to request an In punch to be added to their timesheet.

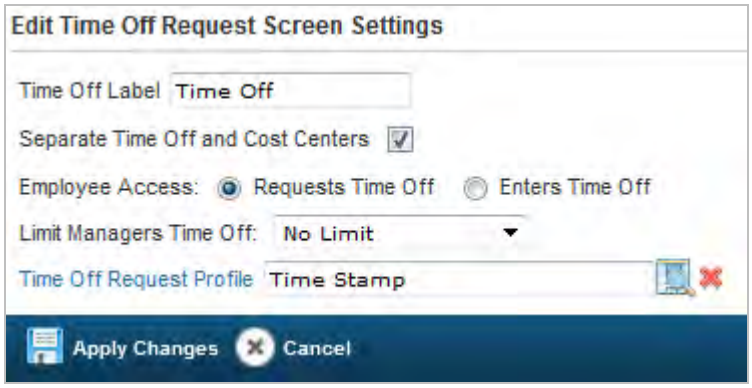
2. **Add Punch Out –** allows employees to request an Out punch to be added to their timesheet.
3. **Add Time Entry –** allows employees to request a time entry be added to their timesheet.
4. **Cancel Time Off** – allows employees to request an already approved time off to be edited or deleted by their manager. The employee and manager's Security Profiles will need to be updated in order to allow for the request and approval of the changes.
5. **Modify Cost Center** – allows employees to request a change to a time entry's already designated cost center.
6. **Modify Pay Category** – allows employees to request a change to a time entry's already designated pay category.
7. **Modify Punch In** – allows employees to request a change to an existing in punch.
8. **Modify Punch Out** – allows employees to request a change to an existing out punch.
9. **Modify Shift** – allows employees to request a change to a time entry's already designated shift.

Time Off Settings

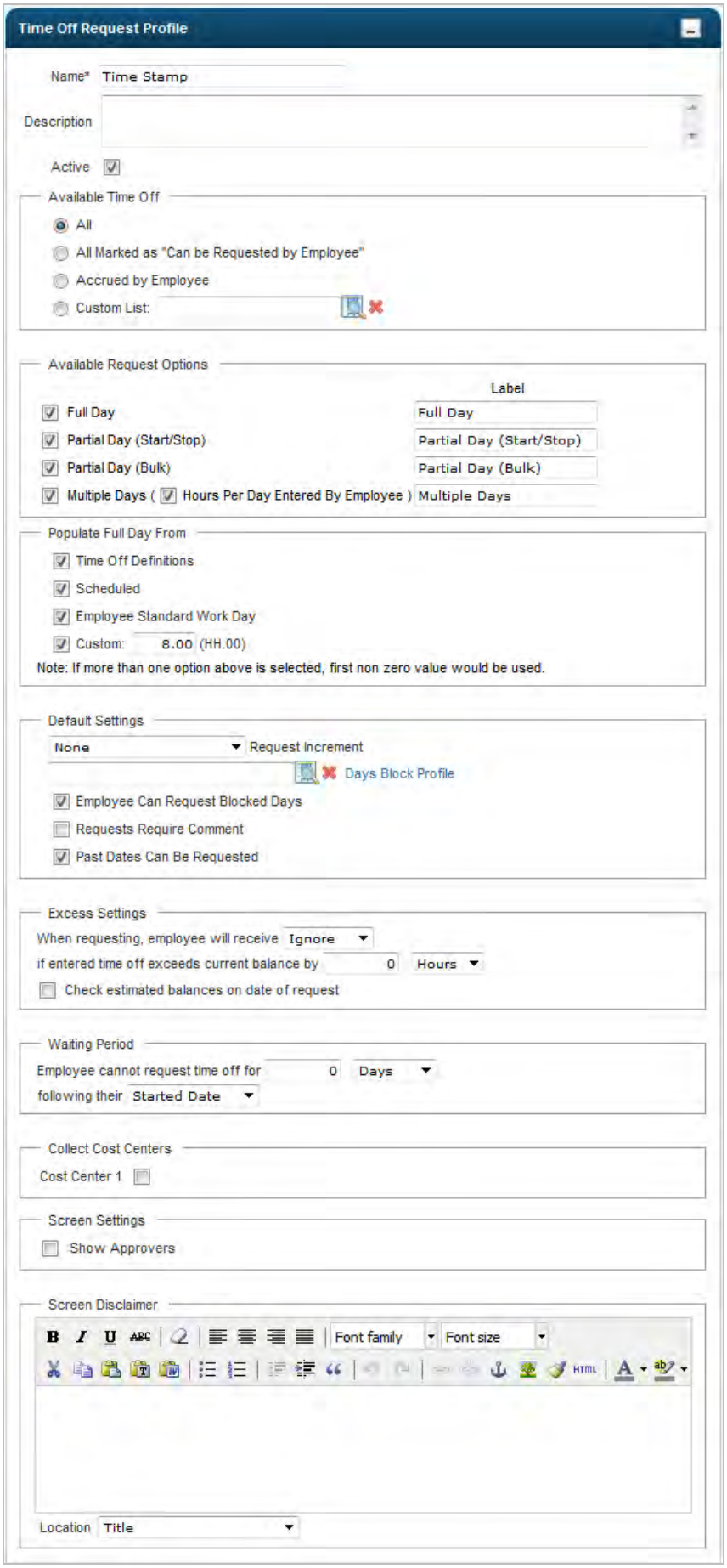
1. By clicking on hyperlink within the **Timesheet profile**, for the **Time Off**, you can edit time off settings relating to both entering and requesting time off.



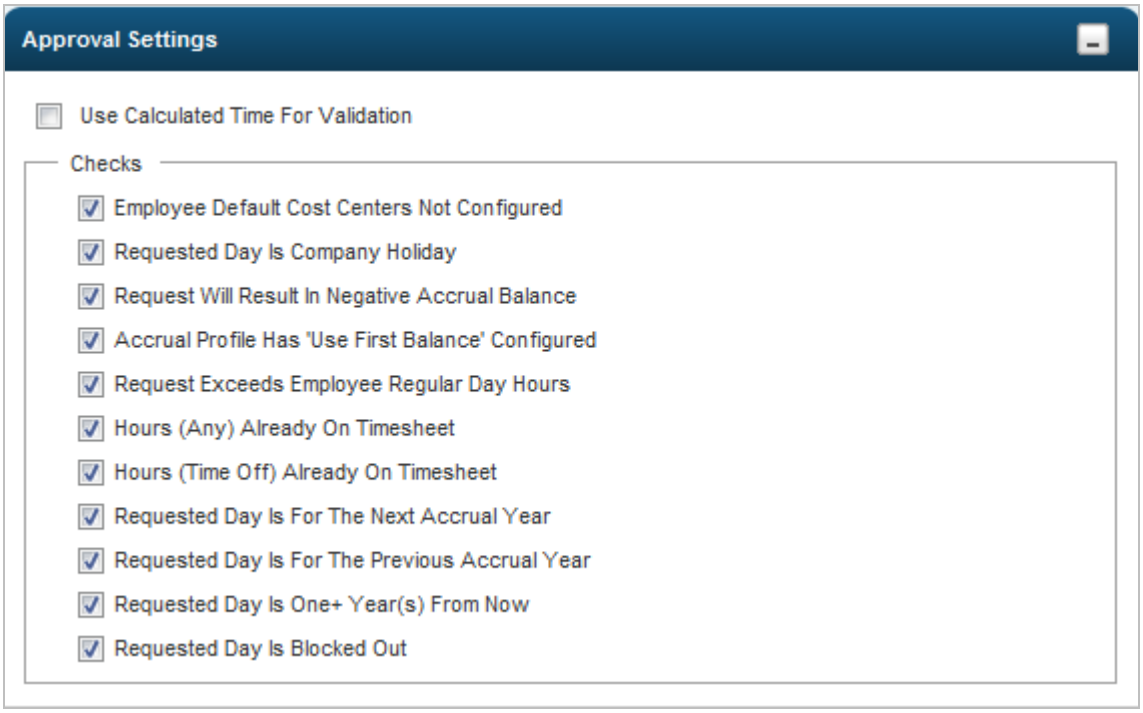
By clicking on the blue pad and pencil, the following screen will display:



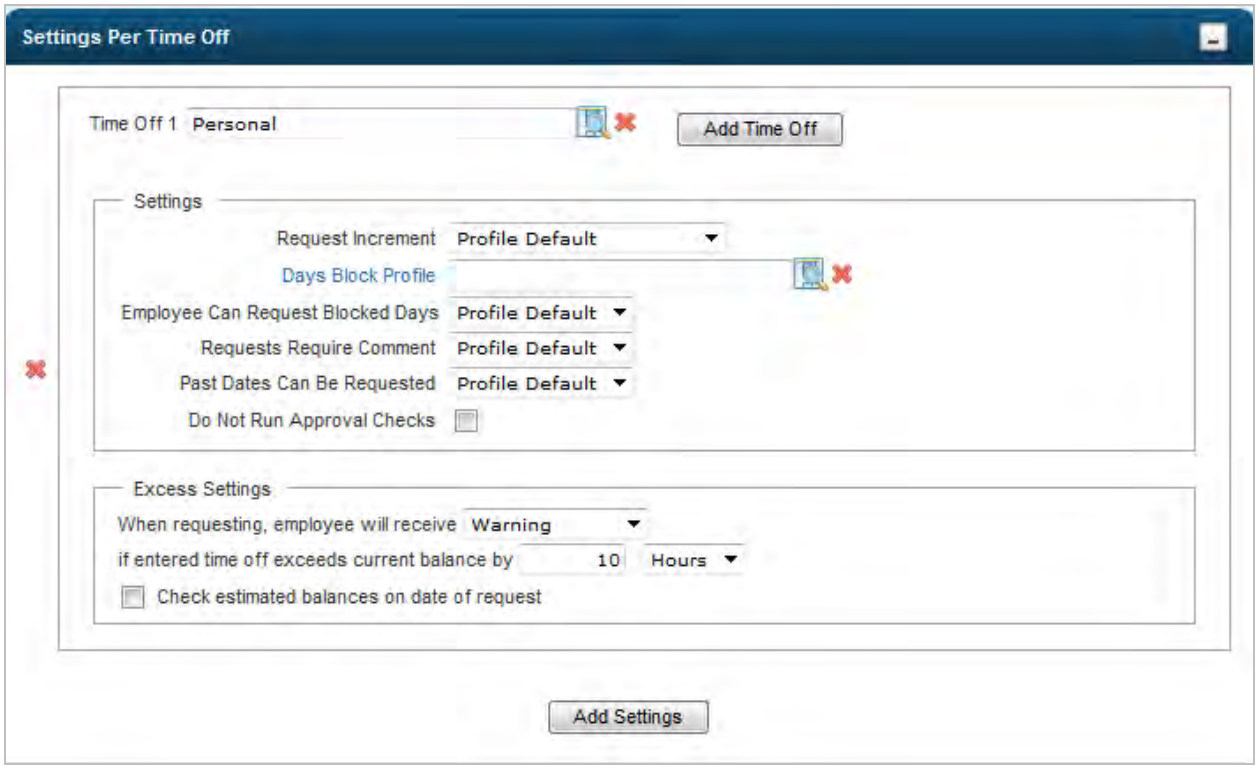
- **Time Off Label** – allows you to change the label of time off, when displayed on the timesheet
- **Separate Time Off and Cost Centers** – when clicking on the look-up for cost centers and time offs, you can have them all grouped together, or displayed as separate look-up icons.
- **Employee Access** – provides the option to allow employees to enter time onto their timesheets (in addition to requesting time off), if they have the ability to edit their personal timesheets
- **Limit Managers Time Off** – can limit the types of time off that a manager has the ability to see and allocate time towards on an employee's timesheet
- **Time Off Request Profile** – attaches the defined Time Off Request Profile (below) to a specific Timesheet Profile.


Time Off Request Profile
Name* Time Stamp
Description
Active
Available Time Off
All
All Marked as "Can be Requested by Employee"
Accrued by Employee
Custom List:
Available Request Options
Label
Full Day
Full Day
Partial Day (Start/Stop)
Partial Day (Start/Stop)
Partial Day (Bulk)
Partial Day (Bulk)
Multiple Days (Hours Per Day Entered By Employee)
Multiple Days
Populate Full Day From
Time Off Definitions
Scheduled
Employee Standard Work Day
Custom: 8.00 (HH.00)
Note: If more than one option above is selected, first non zero value would be used.
Default Settings
None
Request Increment
Days Block Profile
Employee Can Request Blocked Days
Requests Require Comment
Past Dates Can Be Requested
Excess Settings
When requesting, employee will receive Ignore
if entered time off exceeds current balance by 0 Hours
Check estimated balances on date of request
Waiting Period
Employee cannot request time off for 0 Days
following their Started Date
Collect Cost Centers
Cost Center 1
Screen Settings
Show Approvers
Screen Disclaimer
Font family
Font size
Location Title

1. **Available Time Off** - the following selection will limit what an employee is able to choose when requesting time off.
   - **All** - all time off categories.
   - **All Marked as "Can Be Requested by Employee" -** allows you to limit time off requests to only those marked within the Time Off Definitions as **Requestable**.
   - **Accrued By Employee -** allows you to limit time off requests to only those categories for which an employee accrues.
   - **Custom List -** allows you to define a custom list of categories an employee can request off.
2. **Available Request Options** - allow you to limit the options an employee has on the **Request Time Off** screen.
   - **Available Request Full Day** - allows the employee to choose a full calendar day off.
   - **Available Request Partial Day (Start/Stop)** - allows the employee to choose a partial day, and enter a start/stop time for their request. Example: 3PM-5PM
   - **Available Request Partial Day (Bulk)** - allows the employee to choose a partial day, and enter in bulk hours for their request. Example: 2 hours.
   - **Available Request Multiple Days** - allows the employee to request multiple consecutive days off. Example: 2 weeks.
     a. **Hours Per Day Entered by Employee -** allows employee to enter the number of hours they need off for each day requested.
3. **Populate Full Day From** - allows you to define what a Full Day request would mean to an employee assigned to this timesheet profile.
   - **Time Off Definitions** - the full day value will pull from the **Default Hours in a Day** field within the Time Off Definitions.
   - **Scheduled -** the full day value will pull from an employee's schedule on that date.
   - **Employee Standard Workday** - the full day value will pull from the **Standard Work Day** field within an employee's file.
   - **Custom** - allows you to define a custom number of hours.
4. **Default Settings -**
   - **Request Increment** - allows you to specify a minimum increment at which an employee can request time off. For example, selecting 30 minutes would allow an employee to request time off in 30-minute increments.
   - **Days Block Profile** - allows you to select the Days Profile that should apply to this timesheet profile.
   - **Employee Can Request Blocked Days** - allows employees to request blocked out days
   - **Request Require Comments** - can be made mandatory to enter a comment when requesting time off
   - **Past Dates Can Be Requested** - allows employees to request time off retroactively
5. **Excess Settings** – can display a warning or error if an employee makes a time off request that will exceed their current accrued amount. This can then be tied to the **Approval Settings** below.
6. **Waiting Period** – allows you to define the amount of time an employee must wait before having the ability to request time off.
7. **Collect Cost Centers** – allows you to collect cost centers tied to the time off requests employees make.
8. **Screen Settings: Show Approvers** - allows you to specify whether or not the **Approvers** box should appear in the employee's Request Time Off screen.
9. **Screen Disclaimer** - places a disclaimer within the Request Time Off screen. Example: Please ensure to cover your shift on all time off requests. You may determine the location of the request using the drop down with the following options: **Title**, **Before Pending Request**, **On Submit Request**.

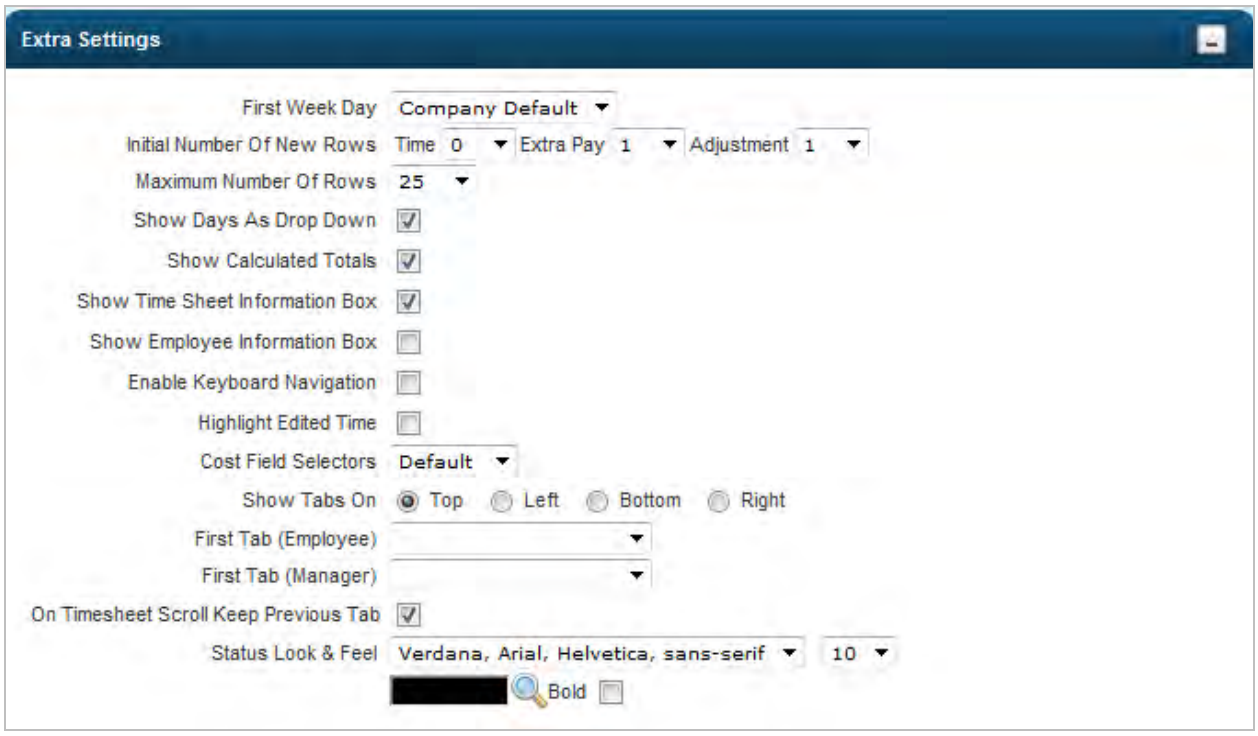


10. **The Approval Settings** box that allows you to configure what warnings should be generated when a manager approves a time off request. Prior to this release, these warnings were in place on the back end with no options to enable and disable. Now, you can enable / disable those options, as you need.



11. **The Settings per Time Off** box, allowing you to configure a request increment, tie a days profile, and warn or error when an employee makes a request putting them into a negative.

Extra Settings

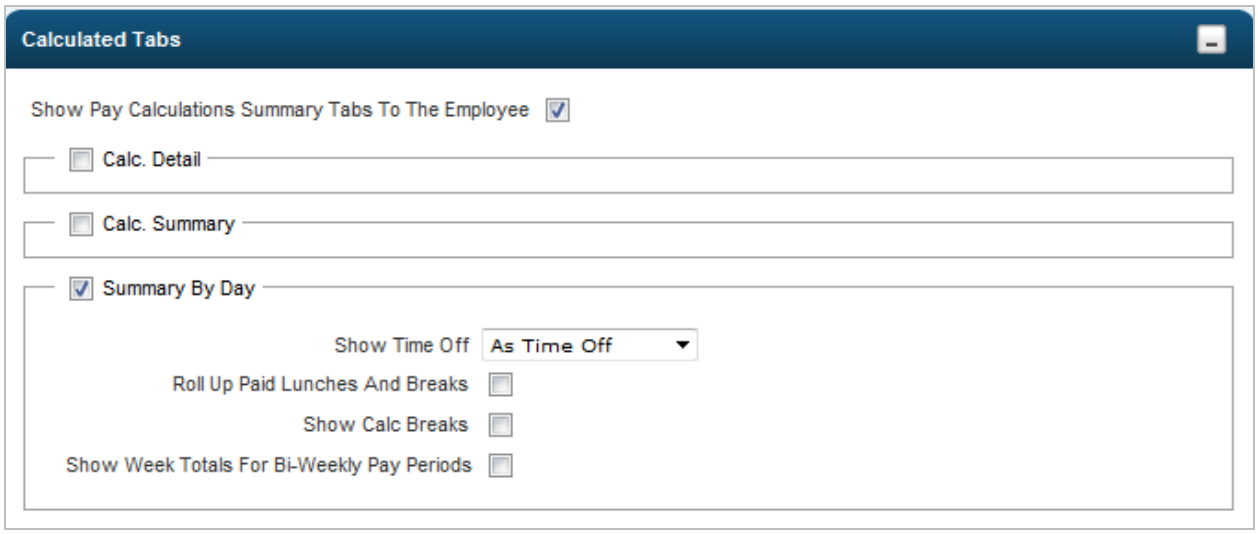


1. **First Week Day** – allows the timesheet profile to have a different first day of the week from other profiles and the company.
2. **Initial Number Of New Rows -** enter the number of rows you want users to start out with on their timesheet. The defaults can be set for both extra pay and hours.
3. **Maximum Number Of Rows -** enter the maximum number of rows users can add to their timesheet.
4. **Show Days As Drop Down -** shows the days in an employee's timesheet as a dropdown selection. Disabling this box would display the days as tabs rather than a drop down.
5. **Show Calculated Totals -** displays calculated totals on each day of the timesheet.
6. **Show Time Sheet Information Box -** displays a box that contains the date the timesheet was created, its current state, and the employee's default cost center.
7. **Show Employee Information Box -** displays the employee's hire and start dates for the manager.
8. **Enable Keyboard Navigation -** allows you to use "Excel" navigation throughout the employee's timesheet, using your arrow keys.
9. **Highlight Edited Time -** allows you to display an "**e**" next to edited punches on the front of the employee's timesheet.
10. **Cost Field Selectors –** allows you to enable or disable the "recently used" cost center drop-down field on the employee's timesheet.
11. **Show Tabs On Top, Left, Bottom, Right -** allows you to choose where the timesheet tabs will display.
12. **First Tab (Employee) -** specify default tab to be displayed for an employee
13. **First Tab (Manager)** - specify default tab to be displayed for a manager
14. **On Timesheet Scroll Keep Previous Tab** - when selecting and scrolling through multiple timesheets, this setting will force the system remember the last tab you were on when scrolling. For example, if you click on the Calc. Detailed Tab, and then scroll to the next timesheet, the system will remember you were looking at the Calc. Detailed Tab.
15. **Status Look & Feel [Font Style] [Font Size] [Font Color] Bold -** allows you to choose the look and feel of the "Needs Saving" by selecting the font style, font size, font color and if it is displayed as bold. This message appears when changes were made to the timesheet but not yet saved.

NOTE: Bulk Hours & Start/Stop Timesheets also have the following options:

16. **Remember Timesheet State** – will remember how the columns within the timesheet are sorted for each timesheet moving forward (Bulk Hours only).
17. **Copy Timesheet State** – will copy over timesheet settings such as selected Cost Centers, Shifts, etc.

Calculated Tabs

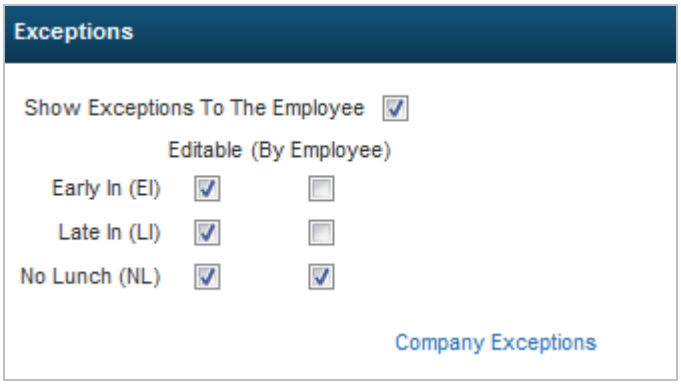


1. **Calculated Detailed** - allows you to enable the calculated detailed tab for display on the timesheet. This feature displays a breakdown of the hours for the user's pay period.
   - **Show Schedule** - allows the user to view their schedule on the Calculated Detailed tab.
   - **Show Raw To/From** – allows you to determine whether or not to display raw from and to times.
   - **Show Calc To/From** – allows you to determine whether or not to display calculated from and to times.
   - **Show Raw Total Hrs**. - allows you to determine whether or not to display raw hours.
   - **Show Daily Notes** – allows for the display of employee's daily notes.
   - **Show TE Notes** – allows for the display of timesheet notes.
   - **Show Days –** allows for the display of days on the timesheet within the timesheet range, or beyond.
   - **Display Cost Centers** – allows you to always display the time entry cost centers, or only when it isn't the employee's default.
   - **Display Cost Centers As** - allows you to determine how cost center information should be displayed (i.e. Name, Abbreviation, etc.)
2. **Calculated Summary** - allows the user to view the calculated summary of hours.
3. **Summary By Day** - allows you to enable the Summary By Day for display on the timesheet. This feature displays a total for the categories listed. I.E. # of Incomplete Records, Calculated Totals, etc.
   - **Show Time Off –** allows you to determine how time off should be displayed – either just the time off, the pay category associated with it, or both.
   - **Roll Up Paid Lunches and Breaks** – when enabled, combines the totals for Paid Lunch into the appropriate column (i.e. Regular, etc.)
   - **Show Cal Breaks** – when enabled, will display calculated breaks (typically visible on the Calculated Detailed Tab)
   - **Show Week Totals For Bi-Weekly Pay Periods** – will display weekly totals on the timesheet even if the pay period is bi-weekly.

NOTE: If Time Entry Approval is enabled, you have the ability to enable a checkbox within the Calculated Tabs window that will allow a manager to approve individual time entries via the Calc. Detailed tab of the employee's timesheet.

Exceptions

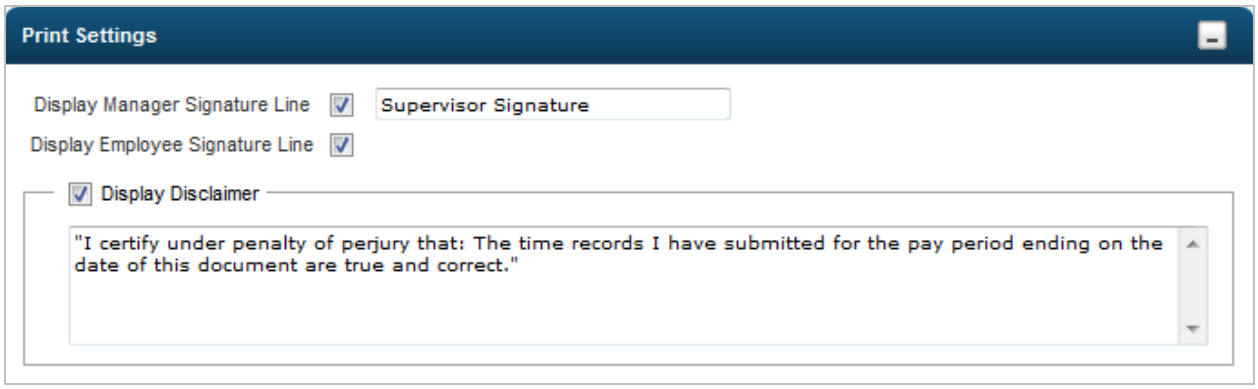
Once an Exception is created (see page 33 on how to create an Exception), you can enable those that are applicable for each Timesheet Profile to display. Those exceptions can then be made employee viewable and/or editable. There are multiple Pay Calculations rules that can be configured as well to automatically generate Exceptions onto the employee's timesheet (see page 58 for more information on those different rules).



1. **Show Exceptions To The Employee** – provides the option to have exceptions viewable to the employees, or only seen by their managers.
2. **Editable (By Employee)** – gives the employees the ability to edit their own exceptions (whether automatically generated in the system or manually assigned), if they are able to see the **Exceptions Tab**.

Print Settings

Within the **Print Settings** window, you now have the ability to enable signature lines, and write a disclaimer that will display on the timesheet when printed.



Timesheet Auto Population

The Timesheet Auto Population Policy applied to a user account determines the user's auto population type. You can have the user's timesheet automatically populated with dates from the holiday table, populated with hours from their schedule cycle, or both. You can configure the settings associated with these Timesheet Auto Population Policies, as well as create additional Timesheet Auto Population Policies.

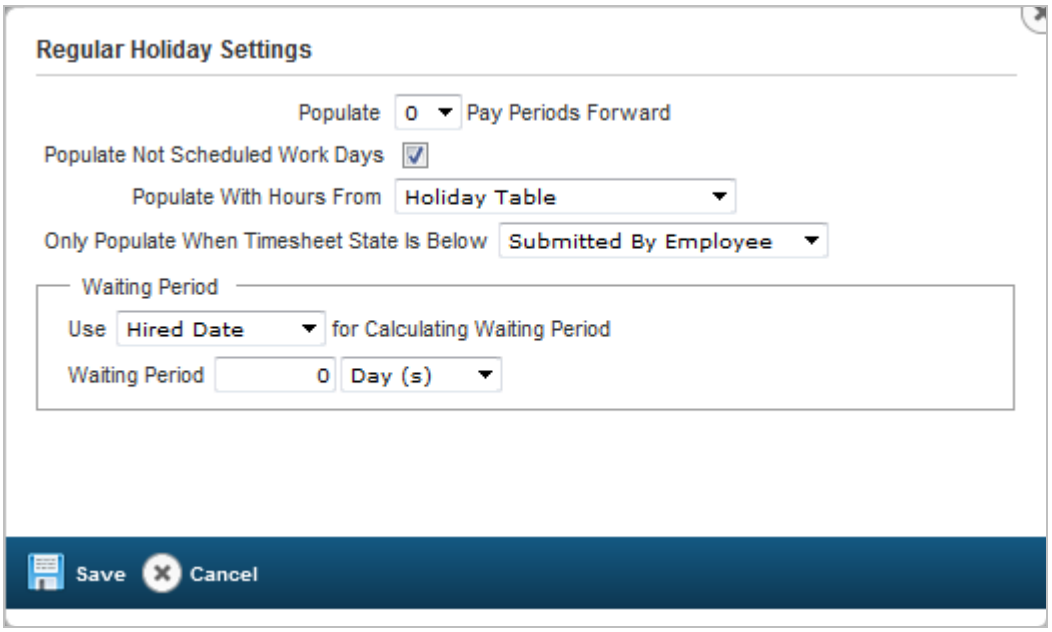
To create a timesheet auto populate policy:

1. Select **Company Settings > Profiles/Policies > Timesheet Auto Population.** The **Company Timesheet Auto Population Policies** screen will display.
2. Click on the

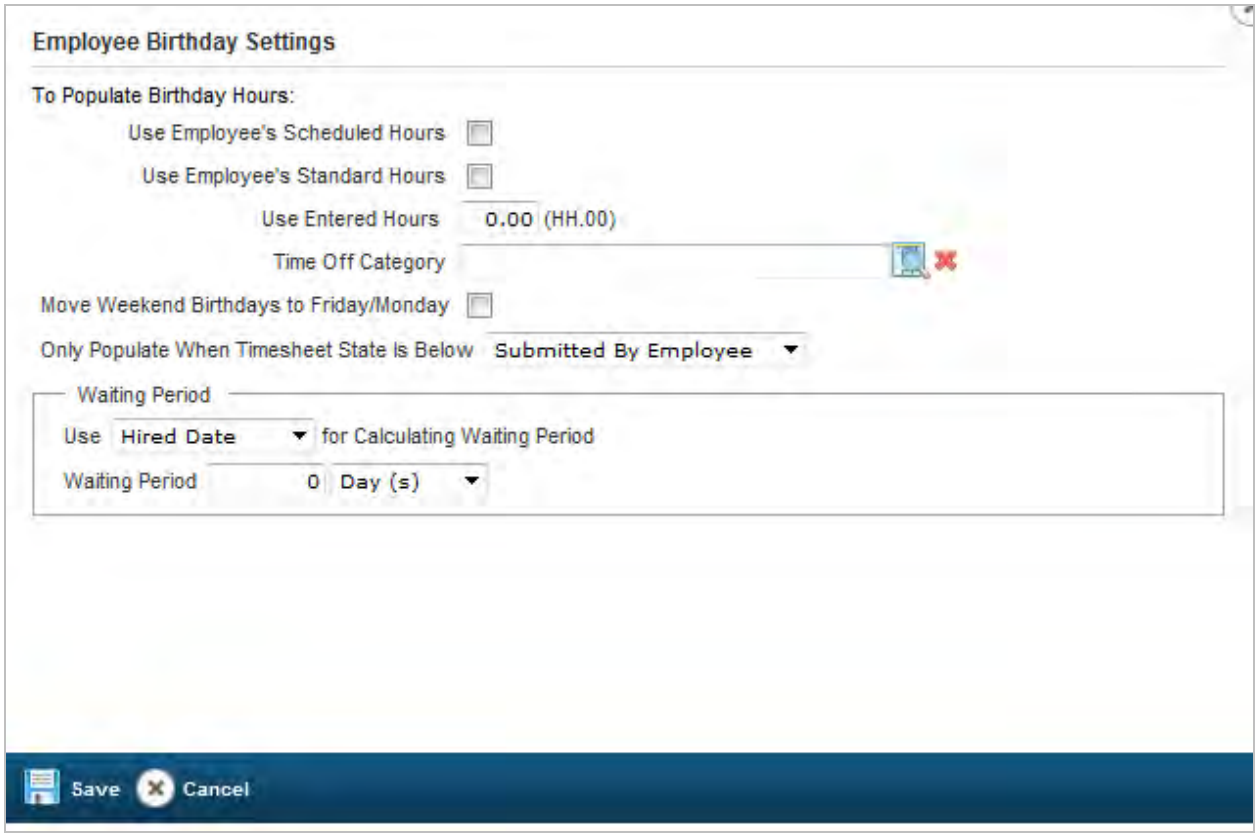
button. The **Timesheet Auto Population Policy Edit** screen will display. Enter the properties of the timesheet auto population policy, and then click the

button. The list below provides definitions for each setting.

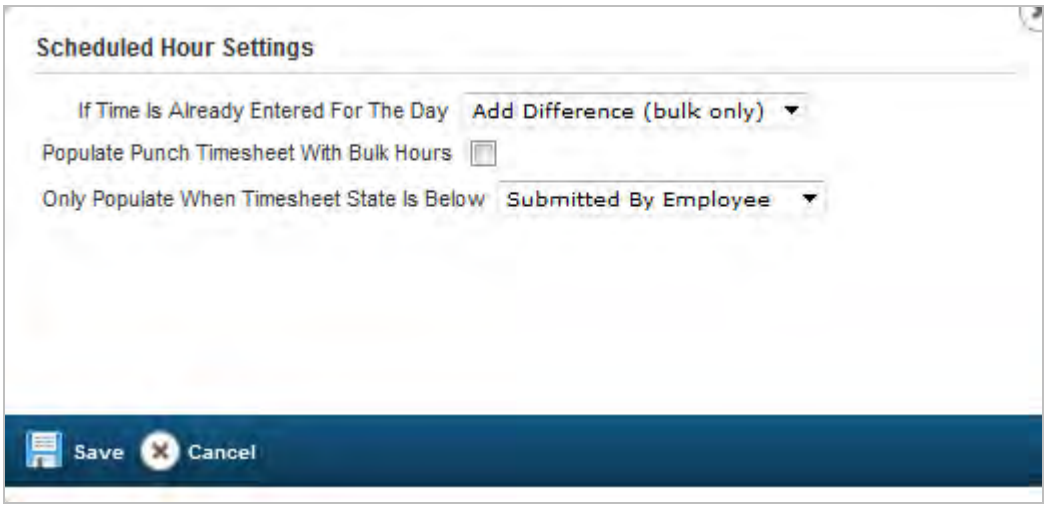
- **Name -** enter a name for the Timesheet Auto Population Policy.
- **Description -** enter a brief description about the Timesheet Auto Population Policy.
- **Populated On -** you can specify whether to populate the hours at the beginning of the pay period, the end of the pay period, or daily.



- **Holidays**
  a. **Populate 0, 1, 2 or 3 Pay Periods Forward -** gives you the ability to populate up to three pay periods forward.
  b. **Populate Not Scheduled Work Days -** select to have holiday dates automatically populate on a not scheduled workday. A not scheduled workday is any non working day as defined in the schedule profile. If no schedule profile is defined, then a not scheduled workday is Saturday and Sunday.
  c. **Populate With Hours From -** the hours for the holiday can pull from the Holiday Table, the employee's Work Schedule, or the Employee's Standard Hours.
  d. **Only Populate When Timesheet Is Below –** determines when the holiday should populate onto the employee's timesheet (i.e. if the timesheet has been submitted prior to the holiday populating, based on the setting in the screenshot above, it would not populate).
  e. **Holiday Probation Period (Days) -** enter the number of days of the probation period if there is a company-defined policy before holidays are given. The start date is the anchor date for this probation period setting.
  f. **Waiting Period -** allows you to specify a waiting period for when an employee is eligible to receive birthday hours.



- **Birthdays**
  a. **Use Employee's Scheduled Hours –** allows you to specify if the hours should pull from the Employee's scheduled hours.
  b. **Use Employee's Standard Hours –** allows you to specify if the hours should pull from the Employee's standard hours.
  c. **Use Entered Hours –** allows you to specify if the hours should pull from the hours entered in the rule
  d. **Time Off Category –** allows you to assign the Birthday hours to a specific Time Off
  e. **Move Weekend Birthdays to Friday/Monday** – will move Birthday hours that fall on Saturdays or Sundays to either Friday or Monday of the previous or next week
  f. **Only Populate When Timesheet Is Below** – determines when the holiday should populate onto the employee's timesheet (i.e. if the timesheet has been submitted prior to the holiday populating, based on the setting in the screenshot above, it would not populate).
  g. **Waiting Period** - allows you to specify a waiting period for when an employee is eligible to receive birthday hours.



- **Scheduled Hours**
  a. **Populate -** to have work schedule hours automatically populate on the timesheet, select the **Populate from Schedule** checkbox.
  b. **If Time Is Already Entered For The Day** - to define what to do if time is already entered on the timesheet, from the **If Time Is Already Entered For The Day** drop down list, you have the following options
     i. **Add All** - populates normal work hours, ignoring the hours already entered on the timesheet.
     ii. **Add Nothing** - does not populate any hours to the timesheet.
     iii. **Add Difference -** populates the difference in hours. Example: if an employee's schedule is for an 8-hour day, and 3 hours are already entered on the timesheet, then 5 hours will automatically populate.

To Auto Populate with Bulk Hours

For a timesheet to auto populate with Bulk Hours, the employee needs to be assigned to the following profiles:

1. A **Work Schedule** configured for M-F, 8 hours per day. Please refer back to the **Schedule Profiles** for complete instructions
2. The **Bulk Hours Timesheet Profile** needs to be assigned to the employee. Please refer back to **Timesheet Profiles** for complete instructions.
3. The **Timesheet Auto Population Policy** has to have **Populate Schedules** enabled. Please refer back to the **Timesheet Auto Population** for complete instructions.

Once you assign the employee to these profiles, the auto population will kick in on the next pay period. To force auto population, do the following:

1. Within your Admin Account, go to **Maintenance > Timesheet > Timesheet Auto Populate**. Find the company, and the employee you want to auto populate.
2. Select the date range you want to auto populate (enter dates for current pay period, not any further in the future. Auto population will kick in on the next pay period).
3. Click **Auto Populate Timesheet**.

Managing Groups

Web Based Time & Labor Management allows you to sort users into **Groups** so that you can assign managers to only those users they should have access to. **Group Permissions** allows you to determine the permission level a manager has over a group.

By default, Web Based Time & Labor Management creates and maintains a group called **All Company Employees**. All newly added users are automatically added to this Group. If after adding user accounts you notice you do not see those accounts when you access **My Employees > Employee Information**, it is because you do not have permissions to the **All Company Employees** Group. Typically, only Company Administrators should have permissions to the **All Company Employees** Group.

You can create any number of Groups to help organize personnel and management responsibilities. Example: you might create a Group called 'Sales' that includes all users that belong to the Sales department. You would then provide the Manager of that department access to the Group with view, edit, and approve permissions over the user accounts that belong to the Group. When the Sales Manager logs in, he/she would see only those accounts, timesheets, and time off requests belonging to the users in the Sales Group. As the example above indicates, managing Groups involves two processes:

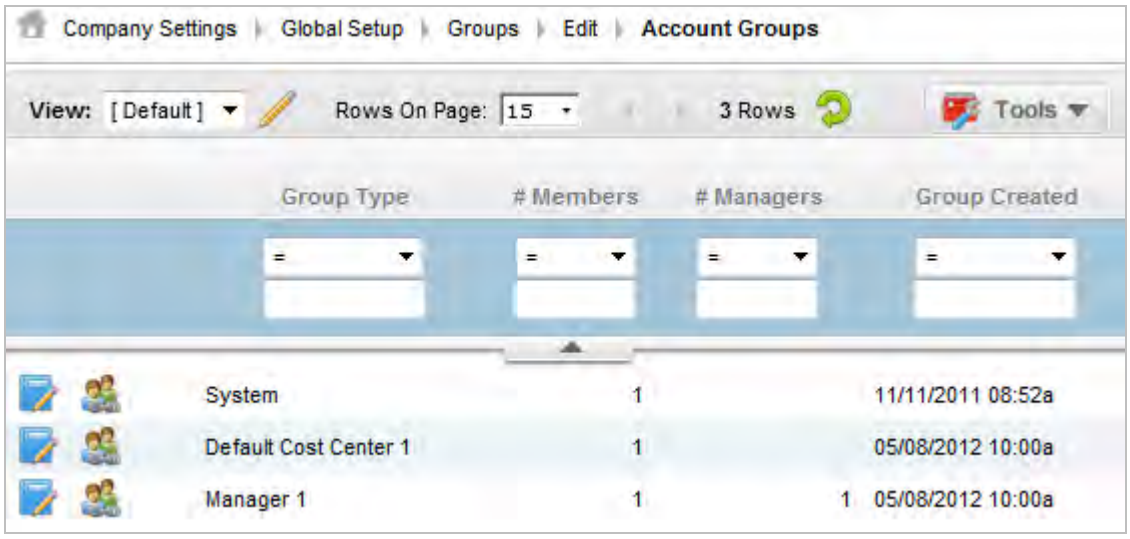
Creating Groups (manually, imported or system generated) and adding users that belong to them.
Assigning permission levels to those that should have access Groups.

You can also provide temporary Group access to a user account if, for example, a manager is on vacation and another user account is substituting for that manager while they are away.

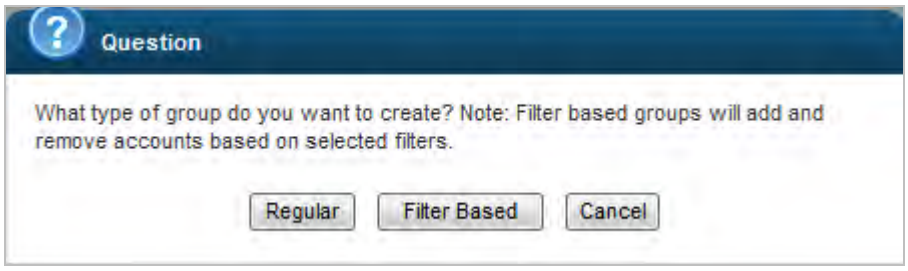
To create an automatic Group:
1. Under **Company Settings > Global Set-up > Company Setup > Company Config Tab**, you can enable different groups that you would like to be automatically created in the system based on what an employee is assigned. For example, as employees are assigned to different Default Departments, the employees will automatically be placed in groups labeled as such. Managers can then be added to those groups accordingly. See below for instructions on adding managers to Groups.

To create a manual Group:

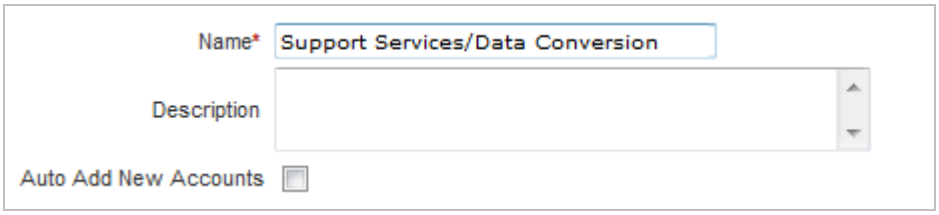
1. Select **Company Settings > Global Set-up > Groups > Edit** to display the following screen.
   - The button allows you to edit the employees within this group.
   - The button allows you to edit the manager permissions of this group.



2. Select New Group to add a new group. **NOTE:** when creating groups in this way, they are not automatically generated by the system, and therefore they have to be maintained and updated manually.
3. You will be prompted with the following window where you can determine whether your group is **Regular** or **Filter Based**. A **Regular** group allows you to add employees individually, while the **Filter Based** group allows you to add employees based on specific attributes such as Default Cost Center, Account Status, etc.



4. In a **Regular** group, you can add employees to this group by clicking the Add To Group button that corresponds to each user account you want to add to the Group.
5. In a **Filter Based** group, you will first enter the name and give a brief description of the group.



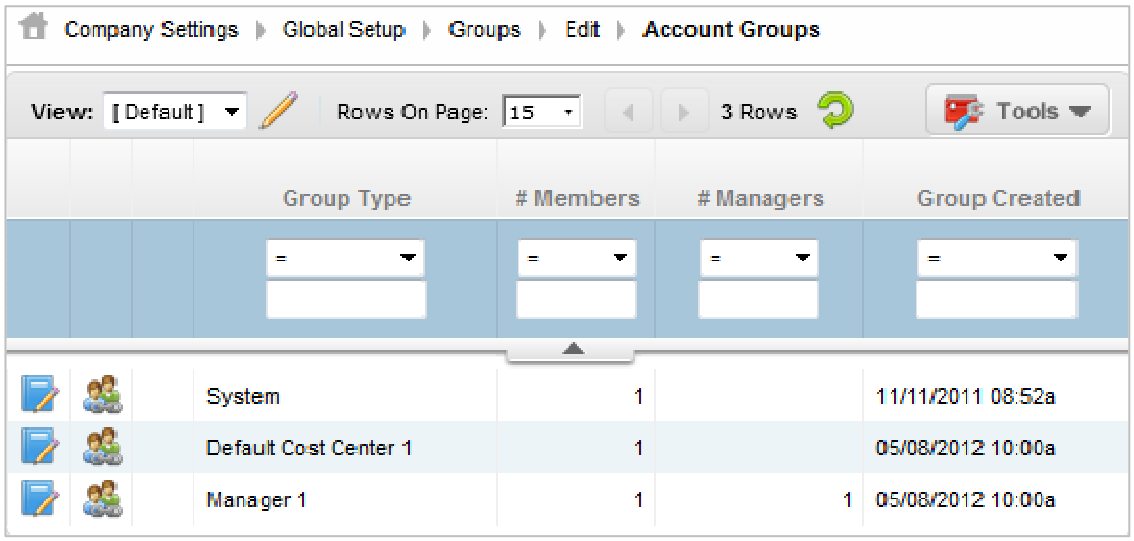
6. Next, click the Save button.
7. In a **Filter Based** group, you can add employees by clicking the Add button. You will then be prompted with the following window.

8. Within the window above, you can select which filter you would like to apply to your group by clicking the button. The employees that fall in the criteria defined by the filters will be added to the new group.
9. Click the Save button.

Tip: Alternatively, you can select the checkbox that corresponds to each user account you want to add to the Group and click the Add To Group button. Then, click the Save button.

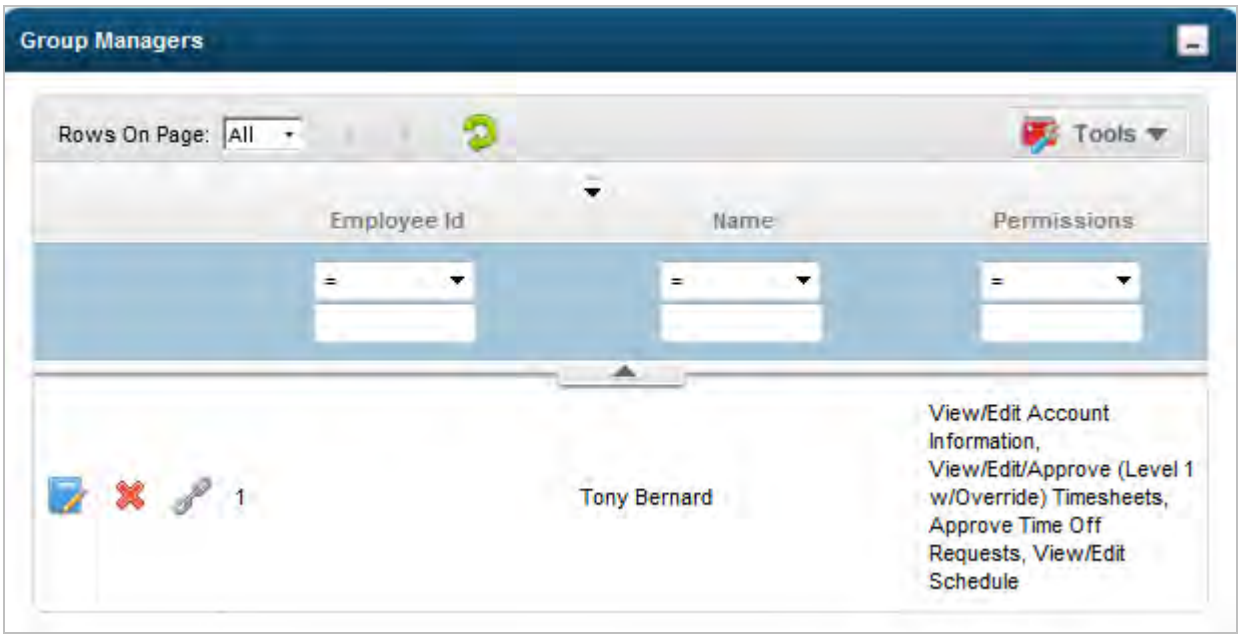
To assign permissions to a Group:

1. Select **Company Settings > Global Set-up > Groups > Edit**. The **Company Groups** screen displays and lists all Groups that have been added.

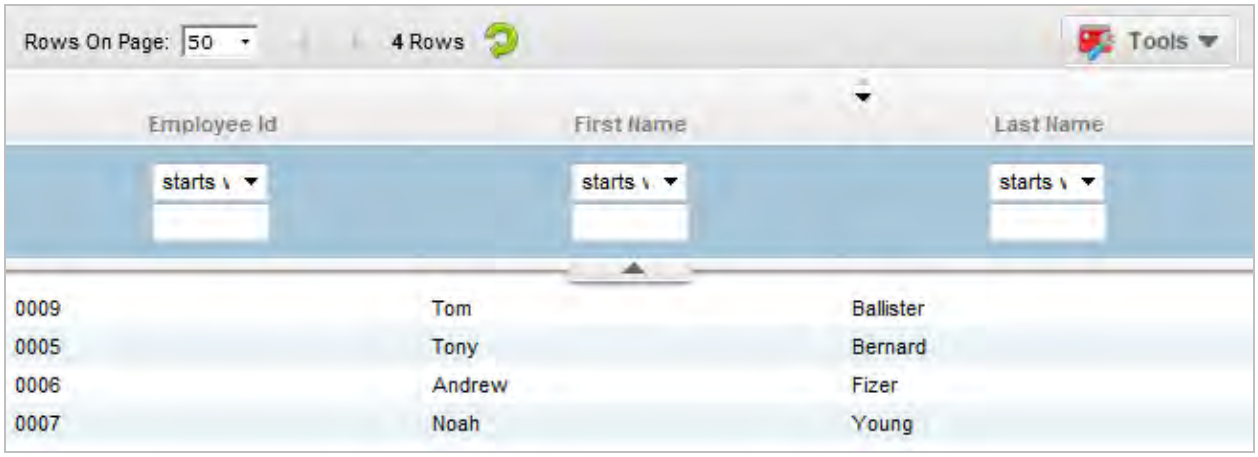


2. Find the Group you want to work with from the list and click its corresponding Group Permissions button. The **Edit Group Permissions** screen will display.

3. The **Group Managers** section allows you to view, edit and add managers that should have permissions to this Group. (If there are already group permissions set up, then the **Group Managers** section would list any users that currently have permissions to this Group, their permission, and approval level)

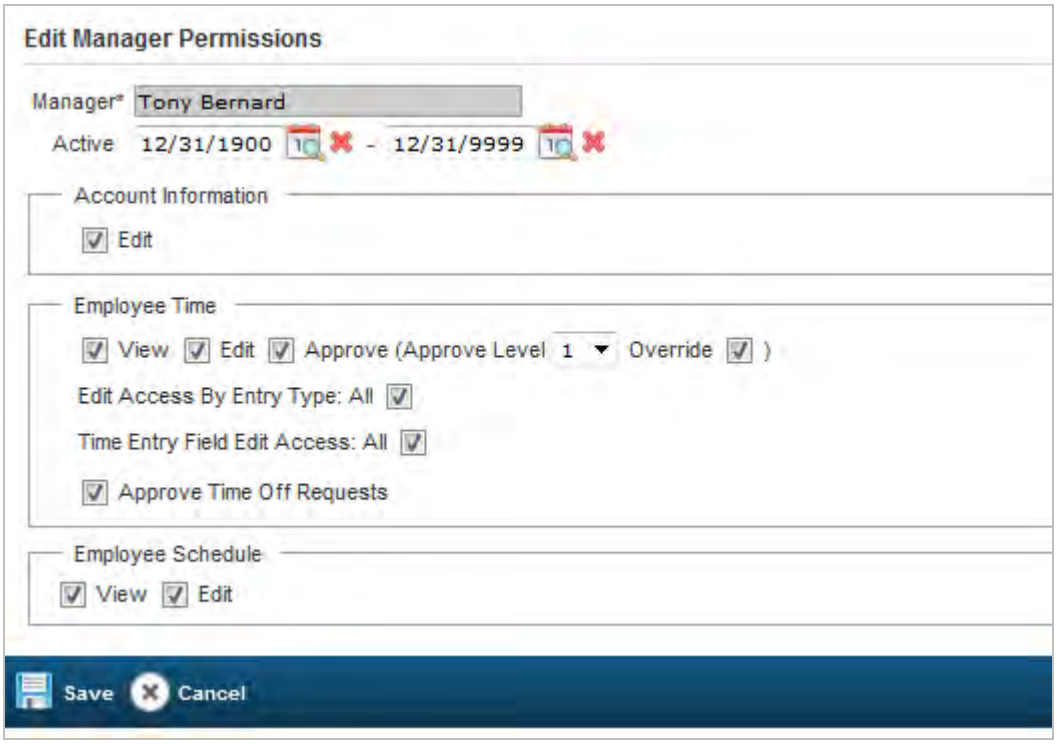


4. The **Employees In Group** section lists the user accounts that belong to this Group.



5. Then, click the

button to view the **Add Manager** window.
6. In the **Add Manager** window, in the **Manager** field, select the user that should have access to this Group by clicking the view list of employees button and selecting the button next to the user account.



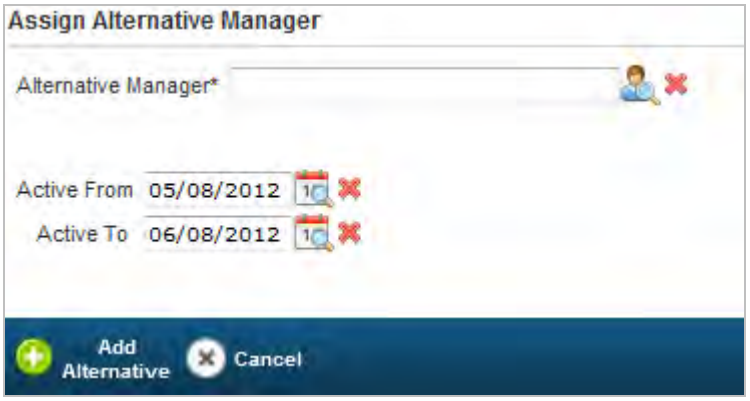
7. In the **Add Manager** window, select the level of permissions you want to give to this user account:
   - **Account Information**
     a. **Edit** - provides the ability to edit user account information (Example: Badge ID).
   - **Employee Time**
     a. **View** - ability to view employee timesheets.
     b. **View/Edit** - ability to view and edit employee timesheets.
     c. **View/Edit/Approve** - ability to view and edit employee timesheets, as well as approve timesheets.
     d. **Override** - ability to override another manager's approval that has a lower approval level than yours.
     e. **Edit Time Entry Type: All** - provides the ability to edit time entry fields such as Time and Time Off.
     f. **Time Entry Field Edit Access: All** - provides the ability to limit which fields a manager has access to edit on a timesheet.
     g. **Approve Time Off Requests** - provides the ability to approve time off requests.
     h. **Approve Time Entries -** provides the ability to approve individual employee time entries.
   - **Employee Schedule**

a. **View/Edit** - ability to view and edit employee schedules.

8. Click the Add button, and then click the Save button.

To assign temporary Group permissions:

1. Select **Company Settings > Global Setup > Groups > Edit**.
2. Click the Group Permissions button next to the Group you want to work with.
3. In the **Group Managers** section, click the Assign Alternative Employee button for the user who needs a substitute manager. You will then be prompted with the following screen.



4. In the **Alternative Manager** field, click the button and select the user account that should have temporary Group permissions. The **Alternative Manager** will have the same permissions as the regular manager.
5. In the **Active From** and **Active To** fields, specify the date range this user should have temporary permissions to the Group.
6. Click Add Alternative.

NOTE: If the user is no longer needed before the date range has expired, you can easily remove their temporary permissions by clicking the Remove Alternative Employee button. Otherwise, once the **Active To** date has expired, the temporary group permission will remain to show as history. If you do not want this to remain to show, you can remove it by clicking the Remove Alternative Employee button.

To manage Group membership:

1. The following reports are available to manage Group membership:
   - **Company Settings > Global Set-up > Groups > Employee Group Membership** - displays all users and the groups that they are members of.
   - **Company Settings> Global Set-up > Groups > Manager Group Access** -- displays all managers and their permissions over groups.
   - **Company Settings > Global Set-up > Groups > Manager Employees Access -** displays all managers and their permissions over employees.
2. **To add/remove users to/from a Group**:
   - Go to **Company Settings > Global Set-up > Groups > Edit**.
   - Click the button that corresponds to the Group you want to modify.
   - Use the button and buttons to add and remove users to and from the Group. Click the Save.
3. **To remove a user's permissions to a Group:**
   - Go to **Company Settings > Global Set-up > Groups > Edit**.

- Click the button next to the Group you want to work with.
- In the **Group Managers** screen, click the button next to each user account you want removed from having permissions to this Group.

4. **To delete a Group:**
   - Go to **Company Settings > Global Set-up > Groups > Edit**.
   - Click the button that corresponds to the Group you want to delete.
   - You will then be prompted to confirm the deletion of this group.

Rate Tables

Rate Tables in Web Based Time & Labor Management can be used for forecasting labor dollars, calculating gross dollars per payroll period, and for billing a third party or client. You can specify rate tables by different categories of time entries, per user (personal rate table), or per shared rate table.

Web Based Time & Labor Management allows you to create as many rate tables as needed per category. Each rate table can be configured with the effective dating feature so as to retain a rate history based on a certain date range. When a time entry is added into the system, a look-up is made for the rate and the rate is assigned to the time entry based on the table rules. All time entry reports allow the amount and rate columns to be displayed, if the rate tables have been enabled. See the following explanation of how a rate assignment would work in the system.

Assigning a Rate to Time Entry:

A time entry has multiple properties assigned to it: Cost Center, Time Off, Shift, etc. The rates are specified based on any of the time entry properties or combination of the time entry properties.

Example:
- If Cost Center = NJ / Bridgewater, then rate = $6.00
- If Cost Center = NJ / Fords, then rate = $7.00
- If Cost Center = PA (including sub tree), then rate = $8.00
- If Cost Center = NJ / Fords & Shift 2nd then rate = $8.00
- If Shift = 3rd then rate = $10.00
- If Shift = 3rd & Custom Field = ABC, then rate = $20.00

A rule is set to match a rate table list record if all of the fields specified in the rule match the time entry record. Order is very important in the rate table. Any rule that is more specific (has more fields specified in match criteria) should be before any rule that is more generic (has fewer fields specified in match criteria). A rule that does not specify any criteria will match any record. A rule like this could be used as a default rule: i.e. if nothing matches, use this rule, but it has to be the LAST rule in the list, as in the example below.

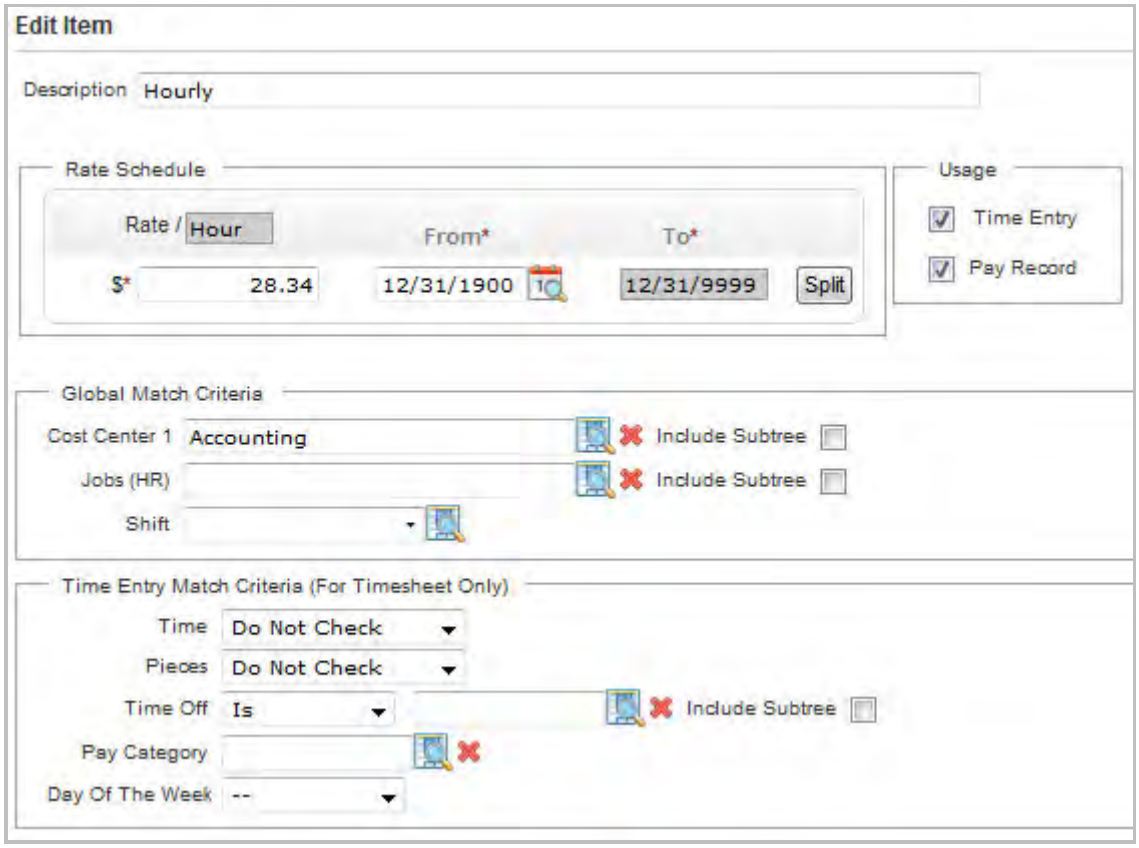
To set up a shared rate table:

1. Select **My Employees > Employee Maintenance > Rates > Rate Tables**. The **Company Rate Tables** screen will display.
2. Click on the

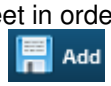
button. The Edit Rate Table window will display. Define a Name and Description for this rate table. The rate table must have a name before any rules can be added. Click on the

button. Now the Rate Table List can be defined.
3. Click on the

button. The **Add New Item** window will display.



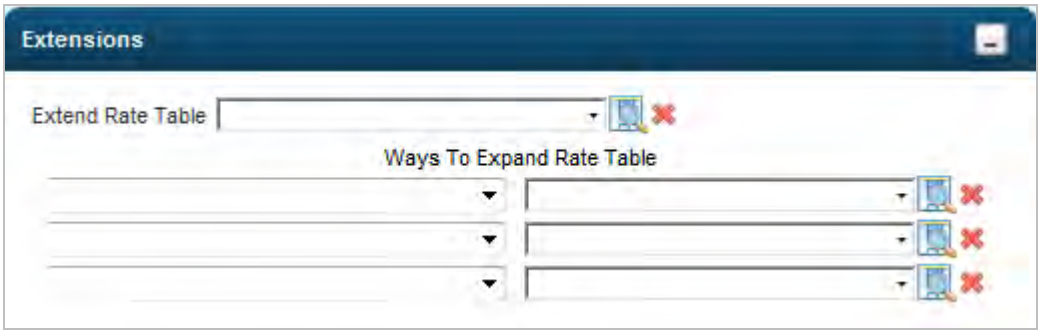
- **Description -** allows you to enter in a description about this rate.
- **Rate Schedule**
  a. **Rate/Hour or Piece** - allows you to select whether this rate is a dollar amount per hour or per piece.
  b. **$** - allows you to enter the rate.
  c. **Effective Date** - allows you to define the dates for which this rate is in effect.
  d. **Split -** allows you to change an employees rate while keeping effective date information in rate history.
- **Usage –** allows you to specify if the defined rate should apply to Time Entries (i.e. directly on the employee's Timesheet), and/or Pay Records (i.e. based on rules defined in the Pay Prep Profile).
- **Global Match Criteria –** allows you to define the criteria which must be met based on the employee in order for this rate to apply. In the example above, an employee assigned to this rate table would be paid $28.34 per hour if they worked in the Cost Center of Accounting.
- **Time Record Match Criteria -** allows you to define the criteria which must be met on the employee's timesheet in order for this rate to apply.

4. Click on the 

button.

To extend a personal rate table:

1. This allows you to pull rates from different rate tables and apply those rates over what is in the personal table, and vice versa. The top option (Extend Rate Table) is the same as using the "Get Alternative Rate From" option listed below. The system will check the rate table assigned within "Extend Rate Table" first, and if no match is found, it will then look to each of the listed extended rate tables to find a match.



- **Get alternative max rate from** – will apply the higher of the two rates to the entry on the timesheet.
- **Add extra rate from** – will apply the sum of the two rates to the entry on the timesheet.
- **Get alternative rate from** – will always apply the rate in the personal rate table instead of the extended rate table, unless there is no match in the personal rate table.
- **Get first alternative rate from** – will always apply the rate in the extended rate table instead of the personal rate table, unless there is no match in the extended rate table.
- **Multiply by rate from** – will apply the product of the two rates to the entry on the timesheet.

To view employee rate table assignments:

1. Select **My Employees > Employee Maintenance > Rates > View Employee Rate Tables**. The **Rate Tables Assigned to Employees** screen will display, showing the employee ID, first name, last name, and rate table name.

2. If you need to change the rate table for a user, you can access the employee file by clicking on the edit employee button and changing the rate in the **Pay Information** area.

To reapply a rate to a previous date:

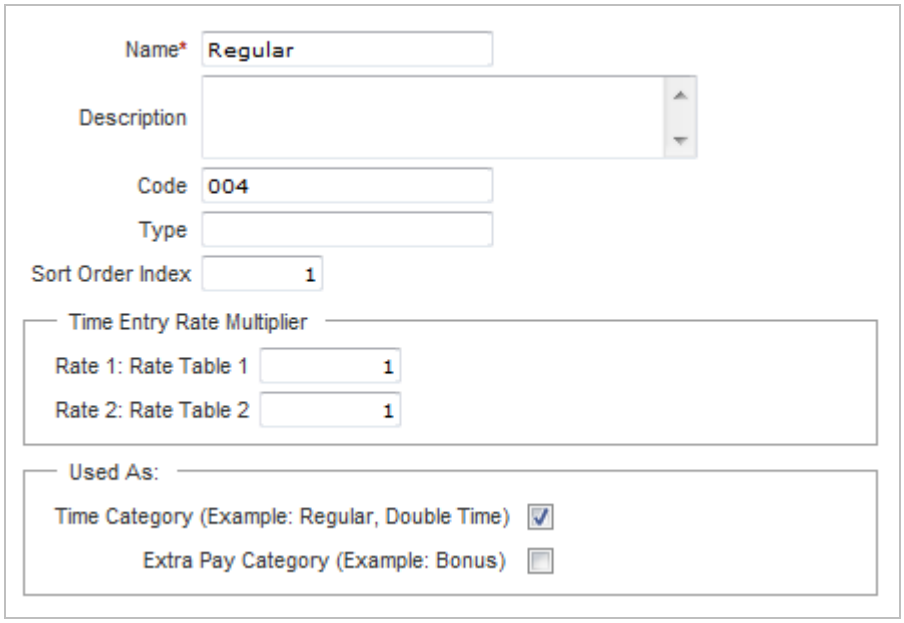
1. Select **My Employees > Employee Maintenance > Rates > Reapply Rates**. The **Reapply Rates** screen will display.
2. Select the **From** and **To** dates that this rate will need to be reapplied to, then select the users this applies to.
3. Click on the Reapply Rates button. The rates will be applied to the time entries for the selected dates.

To review a rate report for employees:

1. Go to **My Employees > Employee Maintenance > Rates > Detailed Rate Report**. This report allows you to review and edit rates for all employees you have access to.
2. Click on the button to edit an employee's rate table.

Assigning a Rate Multiplier to Pay Categories

2. Go to **Company Settings > Time and Labor Set-up > TML List Definitions > Pay Categories.** Click on the pay category in which you would like to attach a rate multiplier to.



- **Name** - allows you to enter a name to use for this pay category.
- **Description** - allows you to enter in a description about this pay category.
- **Code** - allows you to enter a code for the pay category.
- **Type** - allows you to enter in the type of pay category.
- **Sort Order Index** - allows you to enter a sort number as a way of filtering through the pay categories quicker.

3. **Time Entry Rate Multiplier** - allows you to fill in the appropriate Base (Rate 1) and Differential Rate (Rate 2).
4. **Used As** - allows you to choose if the pay category will be used as a time category or as an extra pay category.

User Accounts

Web Based Time & Labor Management allows you to create as many user accounts as needed. Please note that access privileges to software functionality is determined by one's Security Level Profile (**what** you can see) and access privileges to user accounts is determined by Groups and Group Permissions (**who** you can see).

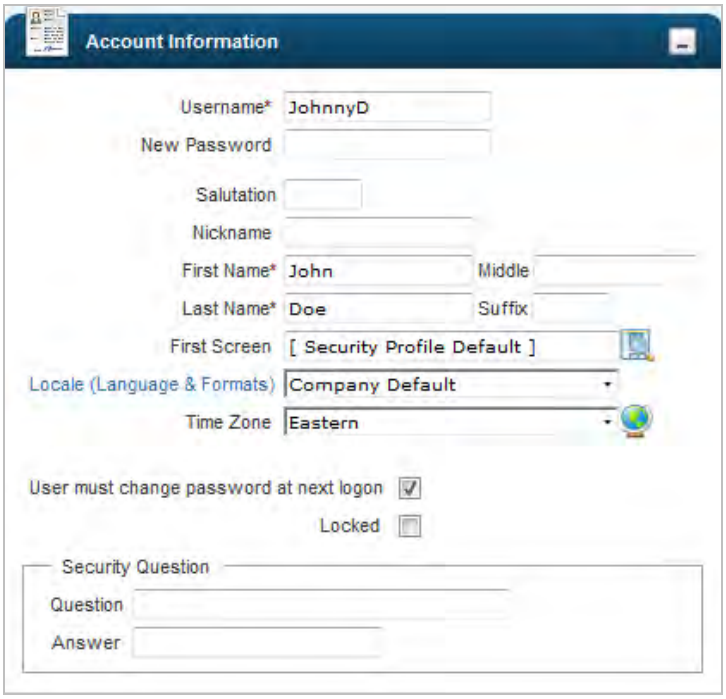
After adding the user accounts, you will need to add the users to the appropriate Group(s) and specify which users should have permissions over the Group(s). For more information, see "**Managing Groups**" on page 60.

To create a user account:

1. Select **My Employees > Employee Maintenance > Hire**. Alternatively, you can select **My Employees > Employee Information** and click the

button.
2. Within the Employee Information Edit Screen, you will see the following windows:

Account Information



- **Username -** the name in which a user will enter when logging into the system. This is typically an abbreviation of the user's full name and is 6 to 20 characters long. **This is a required field in the employee file.**
- **New Password -** assigns a new password to this user. This is a string between 5 and 10 characters long. If this is not populated, it will default to the company defined default value.
- **Salutation -** Mr. Mrs. Ms.
- **First Name -** user's first name.
- **MI -** middle initial.
- **Last Name -** user's last name.
- **Suffix -** Jr. or III.
- **First Screen –** the first screen the employee will see when they login.
- **Locale (Language & Formats) –** allows you to select the appropriate Locale for the employee.
- **Time Zone –** the employee's default Time Zone. If the employee's time zone changes in their employee file, an additional column will appear on the employee's timesheet to reflect the time zone within the employee's file at the time of the first punch since the change. Employee's punches recorded at any clock in any time zone will always be converted to the appropriate time zone based on the employee's default time zone.
- **User Must Change Password at Next Logon -** if selected, this user will be prompted to change his/her password at the next login.
- **Locked -** when selected, prevents this user from logging into the system.

- **Security Question**
  a. **Question** - security question to access the system in case the user forgets his/her password.
  b. **Answer –** answer to the security question.

Profiles

- Lists all profiles assigned to a user account.
- Select the to change the profile assigned. Then, click Save

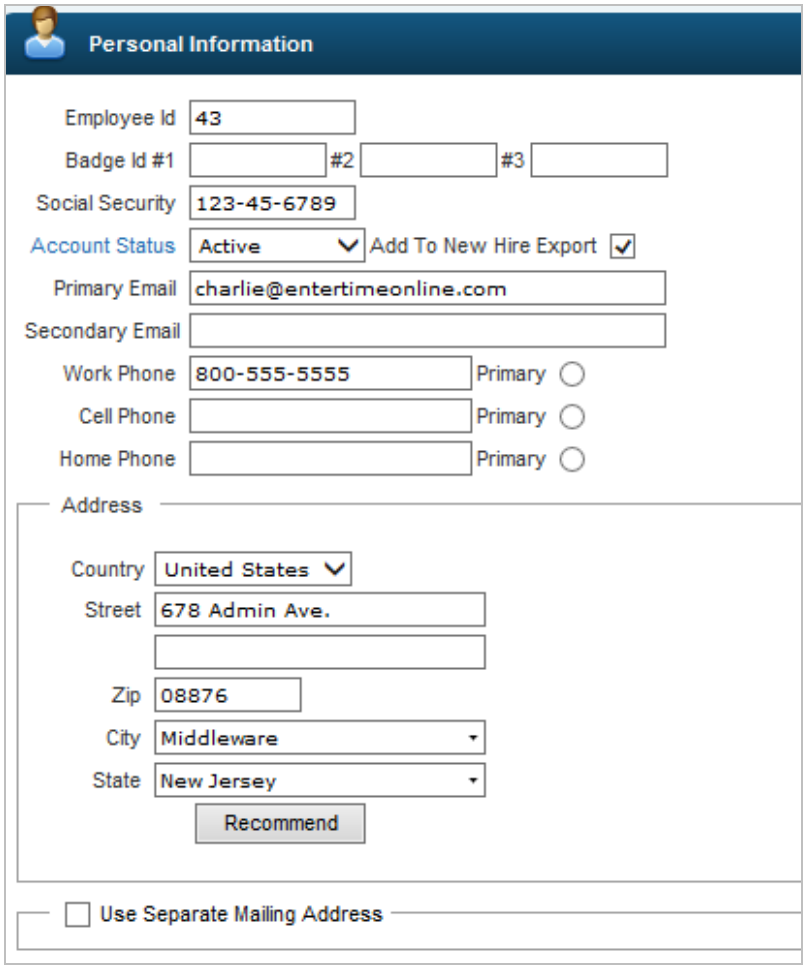
Settings

- **Supervisor/Manager/Time Off Request Handler -** if groups are setup by manager, you would then see these fields allowing you to choose an employee to manage this user. Labels will vary depending on your setup. Moving the pointer over the label will display the permissions of each level you have enabled.
- **Root Cost Center 1 -** limits available cost centers from appearing as a selection within the timesheet. This user will be granted access to the cost center (parent) specified, and to any cost centers underneath (children) who belong to it.
- **Default Cost Center 1 -** enters the new user into a default cost center. Depending on Cost Center setup, you may also see additional fields for each tree enabled.

Accruals

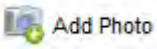
- **Edit Accrual Balances -** manually edit **Accrued To** date and **Hours Remaining** for each accrued time off definition.
- **Time Off Balances -** area describes how much benefit time the user is entitled to, how much they have taken, and whether they have any time off requests pending approval.

Personal Information



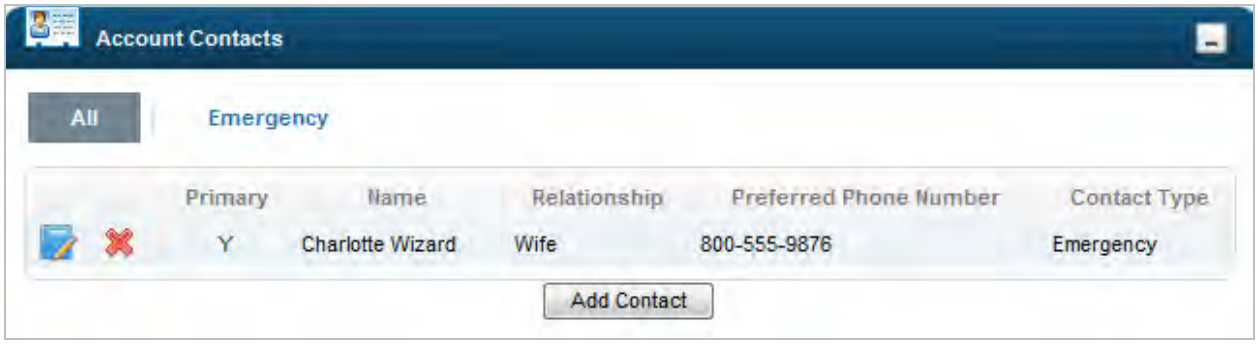
- **Employee ID -** unique ID for this user account, consisting of any combination of letters and/or numbers between 1- 20 characters in length. **This is a required field in the employee file.**
- **Badge ID -** unique ID for this user account, consisting of any combination of letters and/or numbers between 1- 20 characters in length. This field may be required depending on a company's use of a hardware device.
- **Social Security -** user's social security number. This field is not required unless needed to pull over for payroll.

- **Account Status -** user's status in the system: if Inactive, this user will not be able to enter time records.
- **Primary Email -** best address to contact this user via email for system notifications.
- **Secondary Email -** if available used as an alternative address when the primary one is not accessible.
- **Work Phone -** work phone number.
- **Cell Phone -** cell phone number.
- **Home Phone -** home phone number.
- **Address -** user's address information.
- **Use Separate Mailing Address –** allows you to enter an additional address for mailing purposes.

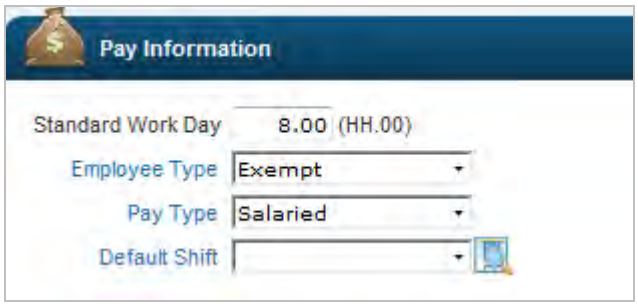
Account Demographics - fields are not required. Click on the 

button to upload an image of an employee.

Account Contact - an employee's regular and emergency contact's information can be entered within this window.

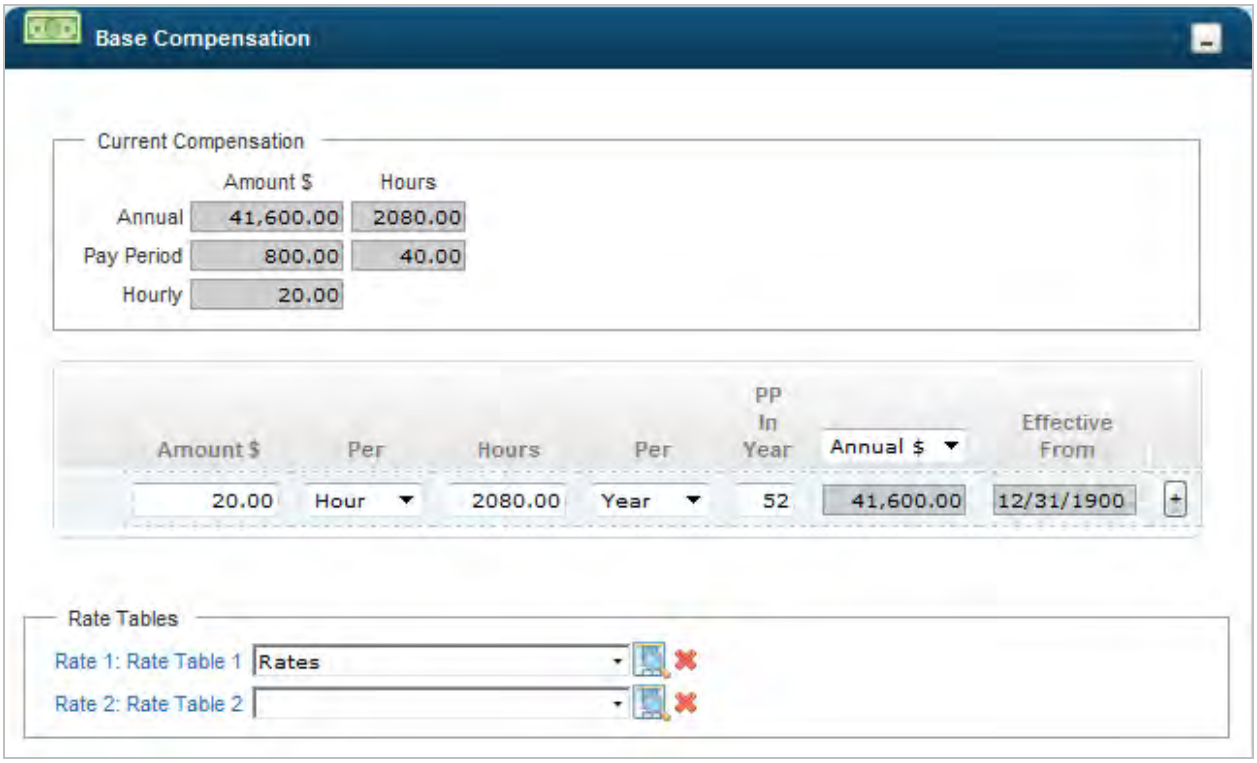


Pay Information



- **Standard Work Day -** standard workday for an employee represented in hour and minutes.
- **Employee Type -** drop down list in this area to indicate whether the user is an Exempt, Non-Exempt, or a Consultant. If you have defined other company user types, they will be included in the drop down list as well.
- **Pay Type -** drop down list in this area to indicate whether the user is paid hourly or by salary. If you have defined other company pay types, they will be included in the drop down list as well.
- **Default Shift -** drop down list in this area to indicate the user's default shift. This shift will apply to all hours worked and time off.

Base Compensation

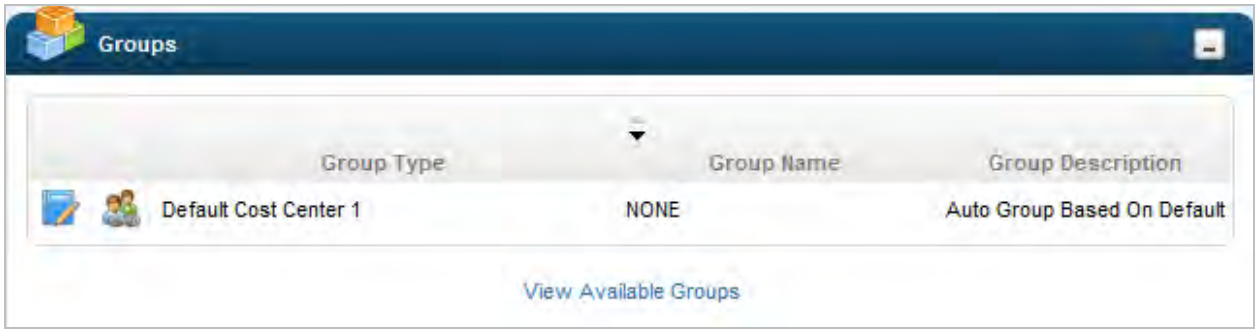


- **Current Compensation -** user's current salary. This field is for display purposes only.
- **Amount –** editable field that will adjust the employee's current compensation. For display purposes only.
- **Rate Table**
  a. **Base Rate -** user's base rate.
  b. **Diff. Rate -** user's differential rate.

Dates

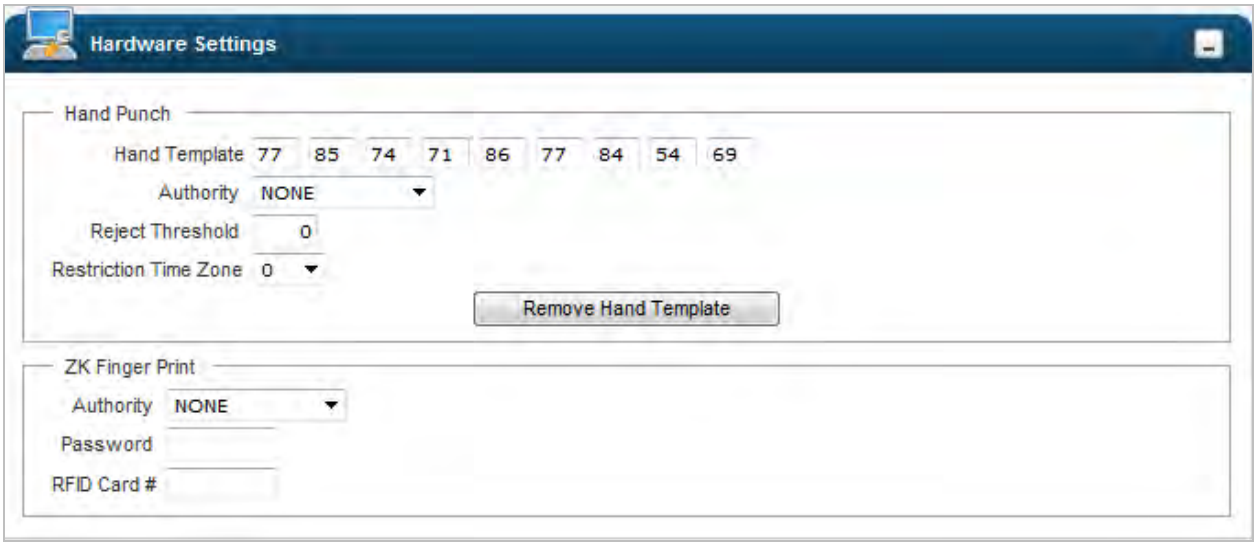
- **Hired -** date of hire used for seniority based reporting. **This field is required.**
- **Started -** start date used for seniority based reporting. **This field is required.**
- **Birthday -** date of birth. (This must be entered if used as an anchor date for benefit accruals.)
- **Re-Hired –** date of rehire if an employee has been previously terminated.
- **Deceased –** date of death.
- **Terminated -** date of termination; will be blank on an active user.
- **Review -** date of the user's most recent review. This field is for reporting purposes only.
- **Seniority -** seniority date. This must be entered if used as an anchor date for benefit accruals.
- **Benefits –** allows you to track an employee's benefit date (such as when they became eligible).
- **Retired –** date of retirement.

Groups - all groups this employee belongs to will be displayed here.



Extra Fields - if any extra user-definable account fields were created within Company Configuration, these fields appear here. Information can be entered into these fields for grouping within reports and other system functions such as mass editing.

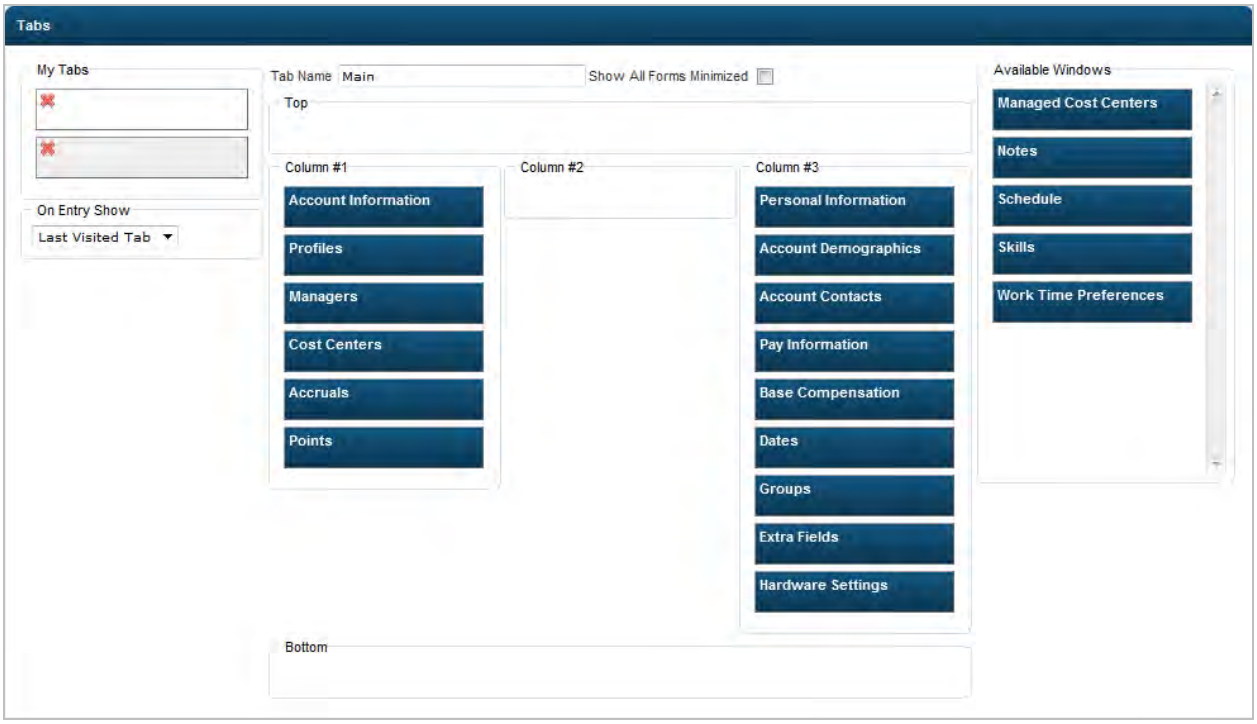
Hardware Settings - the following window will only be displayed if your company is using a RSI HP Series hardware device or ZK Software Finger Print Reader. This window displays a user's hand template and their authority on the clock.



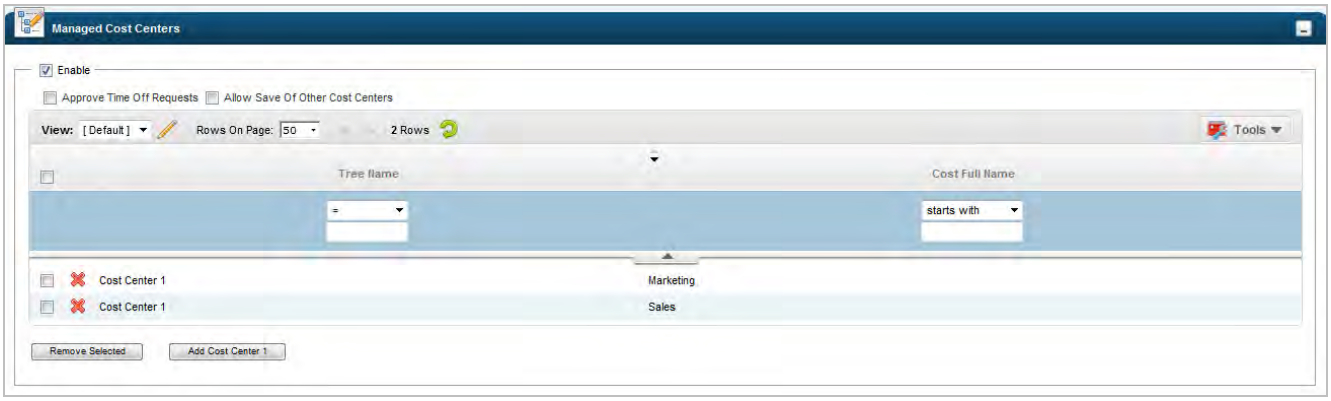
My Tabs - within the Tabs configuration, you have the ability to specify what information should be displayed on the employee's Information Profile.

- **Available Windows** – by clicking the button, you can drag and drop the tabs you'd like included on the Information Profile

a. **Managed Cost Centers** - allows you to specify which cost centers within a company a Manager should have access to. So, for example Alex should see any employee working in her department to approve that time; but not any time outside her respective department.

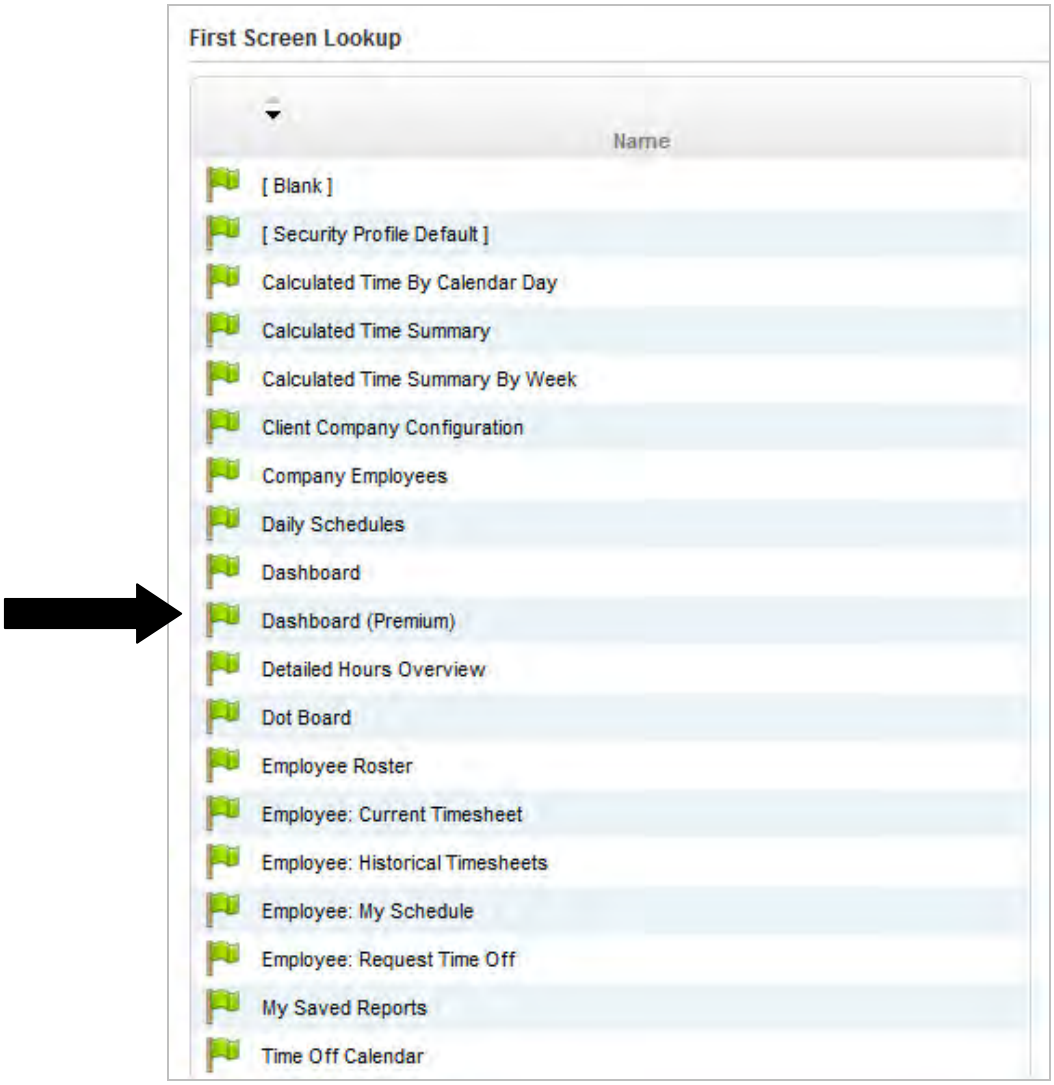


Once enabled, you will see the following window in Alex's employee file. You can simply Add cost centers by clicking on the 'Add" button. This will give Alex access to any employee's time worked the below departments – by adding a "Parent" Cost Center, all of the "Children" (sub-cost centers) will be included.

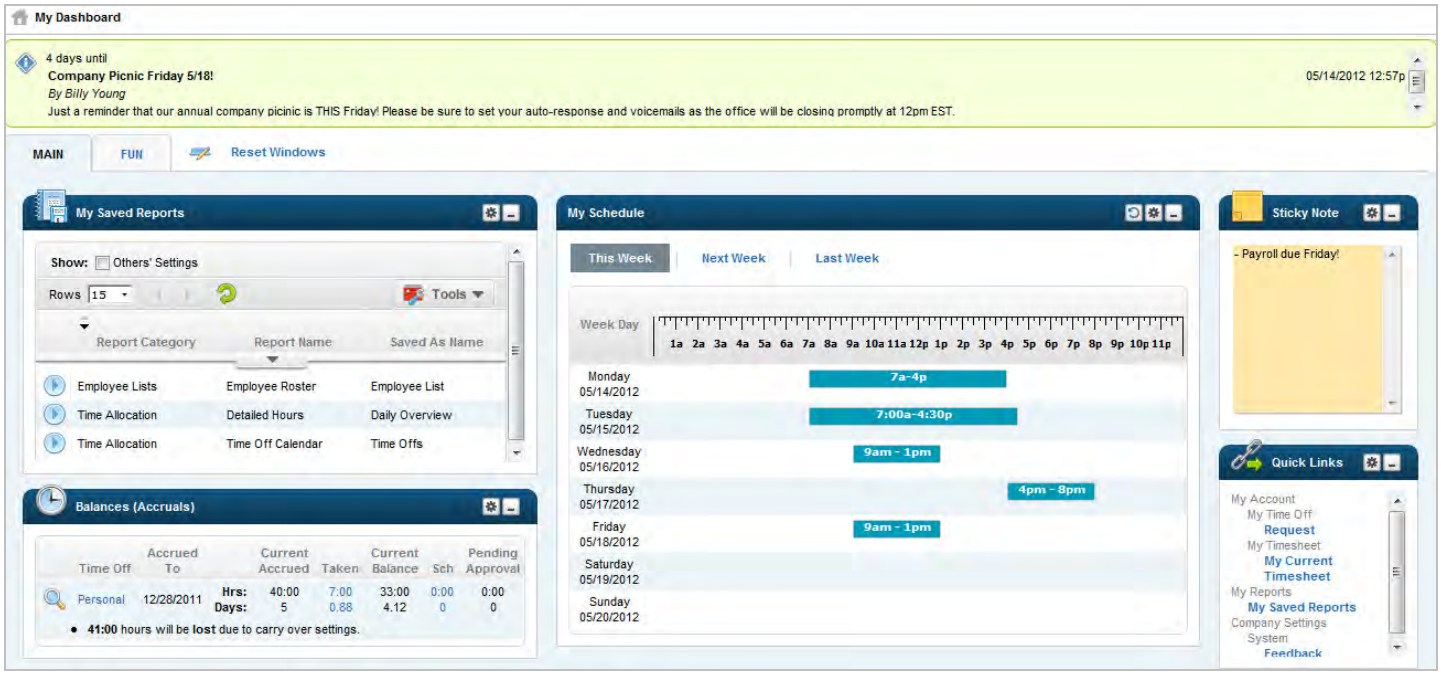


Employee Dashboard – this screen allows you to define a quick snapshot of various reports and tools all in one convenient screen. There are two different dashboard types available, **Dashboard** and **Dashboard (Premium)**.

- Under **My Employees > Employee Information**, or **My Employees > Employee Maintenance > Mass Edit**, you can now assign **Dashboard** or **Dashboard (Premium)** as a first screen.



- The **Dashboard** option will display within **the First Screen Lookup**, however the **Dashboard (Premium)** option will need to be enabled through your **Partner Admin Account**, under **Maintenance > Companies > All System Companies**, and within the **Edit** icon for any **Mid-Market Edition Company**, click on the **Premium Features** link **to Add Premium Feature**. Here, you can select **Dashboard (Premium)**.
- Once a dashboard type is assigned as the employee's first screen, the employee can then configure their **Dashboard** to their liking by clicking on the icon. The image below depicts the default screen that will display.



- Within the **Dashboard Tabs Configuration**, you have several widgets available:
    a. **My Saved Reports** – shows a similar version of the **My Saved Reports** screen, which is also under **My Reports > My Saved Reports**.
    b. **Sticky Note** – an electronic notepad
    c. **Quick Links** – user configurable links to the most commonly accessed areas of the system; My Timesheet, Request Time Off, etc.
    d. **Balances (Accruals)** – displays that employee's current accrual balances, which is also available within the employee's timesheet under **Utilities > Time Off Counts**, or within the **Request Time Off** screen.
    e. **My Schedule** – a quick view of the employee's schedule for that week. Also available under **My Account > My Schedule**.
    f. **Turtles** – when enabled, displays a window of turtles in their tank with the flexibility to adjust the amount of water and turtles that inhabit your dashboard. In order to be a responsible turtle parent, turtle owners must click the tank to provide food and nourishment. In return, your turtles will provide countless hours of friendship and loyalty.
- The **Dashboard (Premium)** option allows for additional, more robust reporting for both Managers and Administrators, including graphs, missing punch overview, pending time off requests, upcoming birthdays and the Dot Board.
- If you navigate away from the **Dashboard**, you must simply click your company's logo in the upper left corner of your screen to return to the **Dashboard**.

Tips on Managing User Accounts

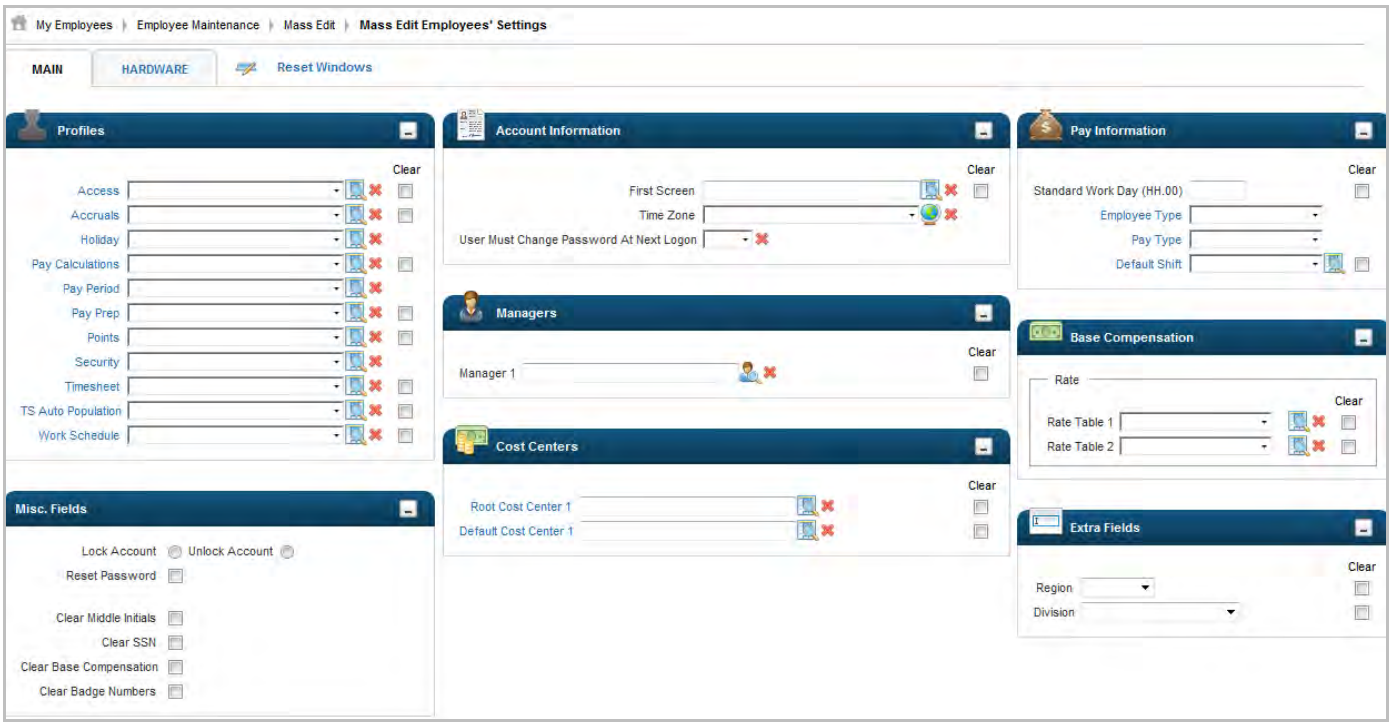
When you are ready to modify or delete user accounts, use the following guidelines:

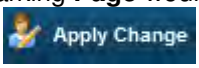
1. To **modify an individual user account**, go to **My Employees > Employee Information**. Click the button that corresponds to the user account you want to modify. Alternatively, you can also select the checkbox that corresponds to the user account you want to modify and click the View Selected Employees button. If you select multiple checkboxes, use the Next Employee Prev Employee buttons to scroll through the selected user accounts and make your changes. Make your changes as desired and click the **Save** button.

2. To **delete a user account**, go to **My Employees > Employee Maintenance**. Click the button that corresponds to the user account you want to delete. The system prompts you to confirm the deletion. Click **OK**.
3. When you need to make changes to multiple user accounts, the most efficient method to use is the **Mass Edit** tool (described below).

To mass edit user accounts:

1. Select **My Employees > Employee Maintenance > Mass Edit**.
2. The **Profiles, Settings, HR Info, and Misc. Fields** windows allow you to select the settings you want to apply to the user accounts listed below. To do this, simply click the lookup buttons next to each field and select the desired setting by clicking its corresponding select button.

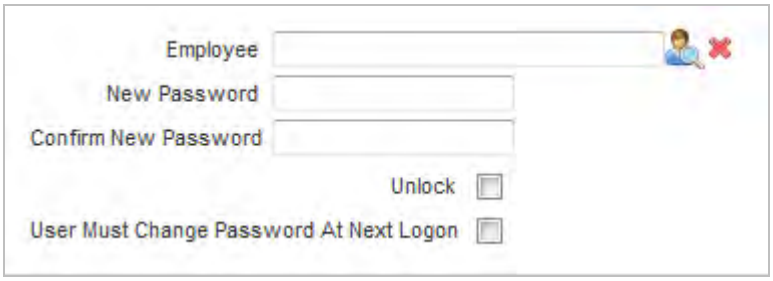


3. In the employee list, select the checkbox for each user account this mass edit applies to. (Under the **Run** button, check marking **All** would apply this change to everyone in this report, even if they are not showing on the screen; check marking **Page** would apply this change to just the users showing on this screen.)
4. Click the 

button.

To change an employee's password:

5. Go to **My Employees > Employee Maintenance > Change Password**.
6. Select the button to find the employee whose password you would like to change.
7. Enter in the new password, and specify whether you would like to unlock the employee, and if they should change their password the next time they clock in.



8. Click the Change Password to change the employee's password.

To reset an employee's password:

1. Select **My Employees > Employee Maintenance > Reset Password**.
2. Filter to find the employee with the button.
3. You can choose the unlock check box if the employee has been locked out of the system. After 3 failed login attempts, an employee is automatically locked out of the system for security purposes.

4. Click on the Reset Password button. The password will be reset based on password settings configured in Company Configuration.

To unlock an employee's account:

1. Go to **My Employees > Employee Maintenance > Unlock.**
2. Filter to find the employee with the button.

3. Click on the Unlock button.

To terminate a user account:

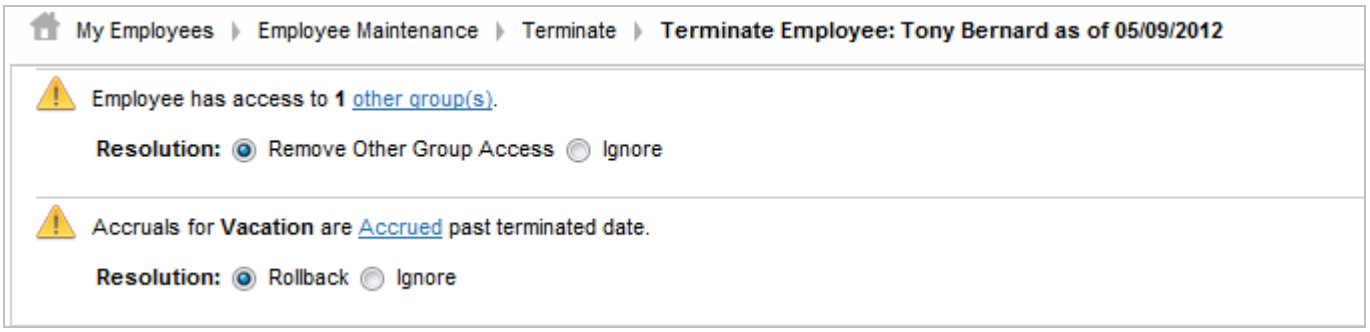
1. Select **My Employees > Employee Maintenance > Terminate**.

2. Select the employee using the button.
3. Select the **Last Employment Date** using the button.
4. Select the Continue Termination button at the bottom of the screen to terminate the employee.

Tip: Alternatively, you can terminate a user by going to **My Employees > Employee Information**, select the user using the edit employee button, and selecting the Terminate button from the **Dates** window of the **Employee Information Edit** screen.

5. A series of checks will take place to:
   - Ensure there are no pending time off requests after the terminated date.
   - Ensure that there is no time entered on the timesheet after the terminated date.
   - Ensure that if this user is a manager, that they have no time off requests waiting their approval.
   - Ensure that if this user is a manager and has access to groups, that they are removed from the group or the group is reassigned to a new manager, and looks at the security profile and specific tasks are reassigned.

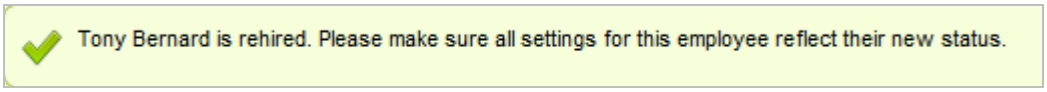
- Ensure that accrual up to date equals the terminated date (if the date has past, it must be edited and put back to the terminated date).



6. To handle each issue listed above, click on the **blue** underlined link and it will take you to the appropriate screen to handle this concern. Once all issues have been addressed, then the user will successfully be terminated and the terminated date will be added to the employee file.

To re-instate a user account:

1. Select **My Employees > Employee Information**.
2. Locate the terminated user from the **Employee Lists** screen and click on the button.
3. Click on the Rehire button under the **Personal Information** or **Dates** area of the **Employee Information Edit** screen.
4. Enter the **Rehire As Of** date using the calendar button, and click Rehire Employee on the navigation bar.
5. The rehire process was successful when the following message appears at the top of the **Employee Information Edit** screen:



To delete a user account:

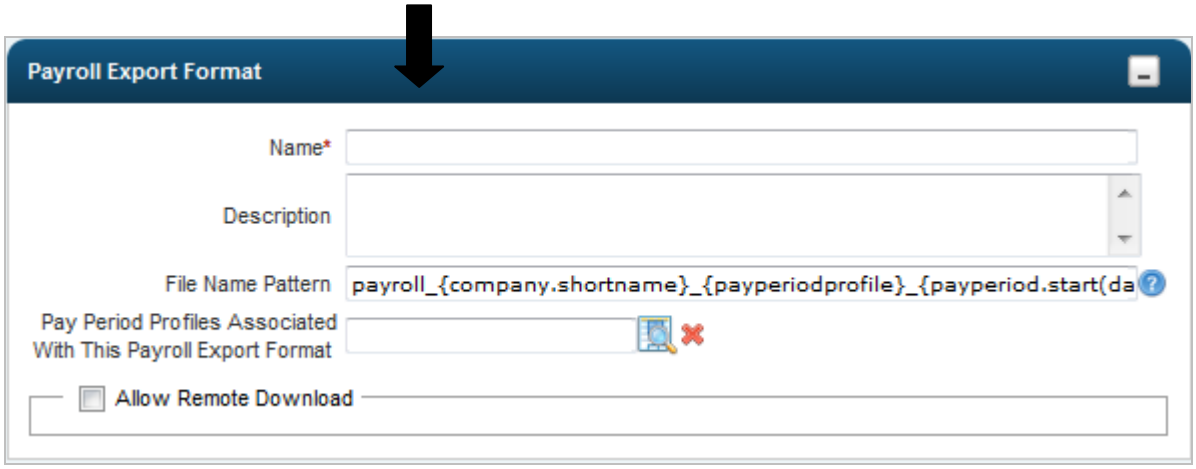
1. Go to **My Employees > Employee Information** and click on the Tools and click **Select Columns**.
2. Add **Button: Delete Employee** by clicking on the to move it over, and click **Select Columns**.
3. Click on the to delete the desired employee. You'll be prompted to enter your password.

Please Note: Deleting a user account in the system will remove all historical data.

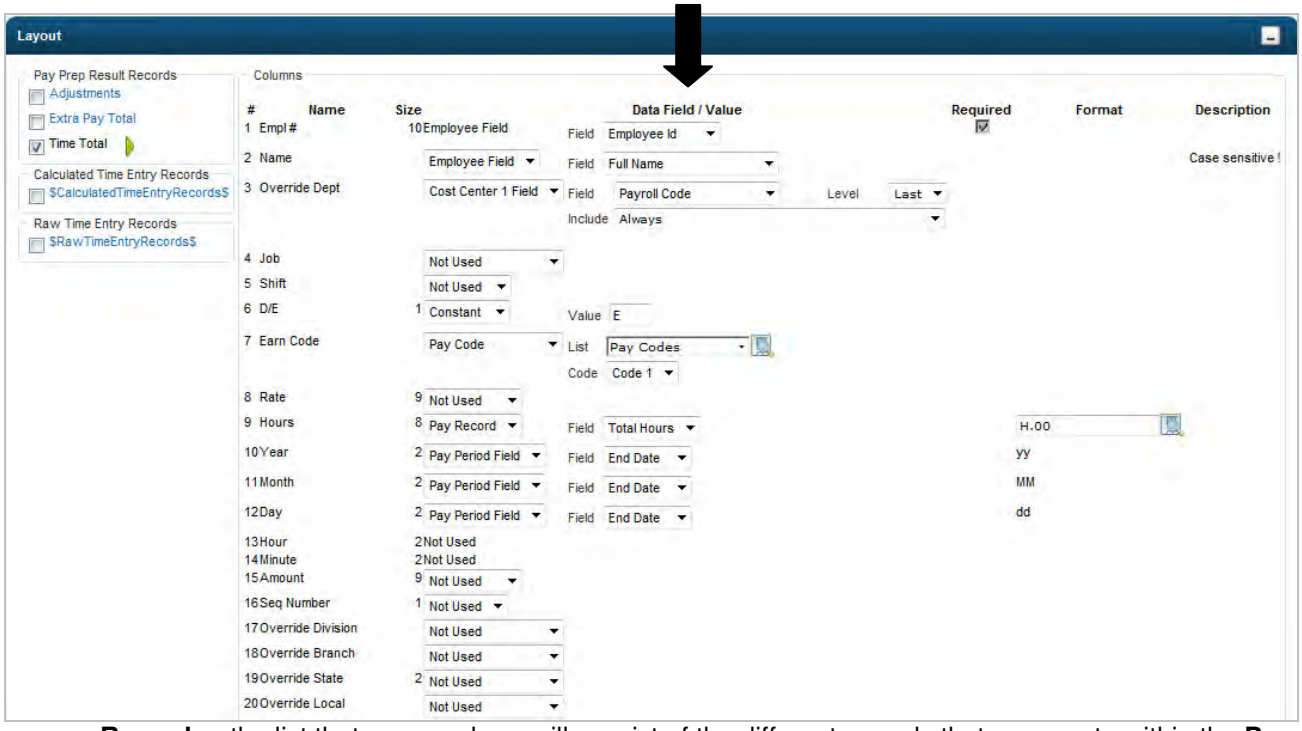
Processing Payroll

To define your payroll export format:

1. Select **Company Settings > Time & Labor Set-up > Export > Payroll Export Formats**.
2. To create a new export profile, select the New Payroll Export Format Profile button.
3. Select the export format that you will be using. Example: selecting the Evolution button. This will take you to the **Payroll Export Format Profile**.



- **Profile Name** - type in the profile name of your payroll export format.
- **Description** - type in a brief description of the payroll export format.
- **File Name Pattern** - the pattern in which your payroll file name is formatted.
- **Pay Period Profiles Associated With This Payroll Export Format** – allows you to tie one specific pay period to the format, instead of configuring it to apply to all pay periods.



- **Records** - the list that appears here will consist of the different records that you create within the **Pay Prep Profile**. Example: if you were summing up the extra pay total in Pay Prep, you would also see this record listed here.
- **Columns** - define the data field payroll is looking for and the value Web Based Time & Labor Management will provide. For example, on line 1 payroll needs the employee's number, in the drop down above Web Based Time & Labor Management can provide **Employee ID, Social Security, Badge ID, or Username**.

4. After all the information has been filled in select the

button.

5. To view the Payroll Export Codes select the

button or go to **Our Company > Time and Labor Set-up > Export > Payroll Export Codes.**

6. Click on the

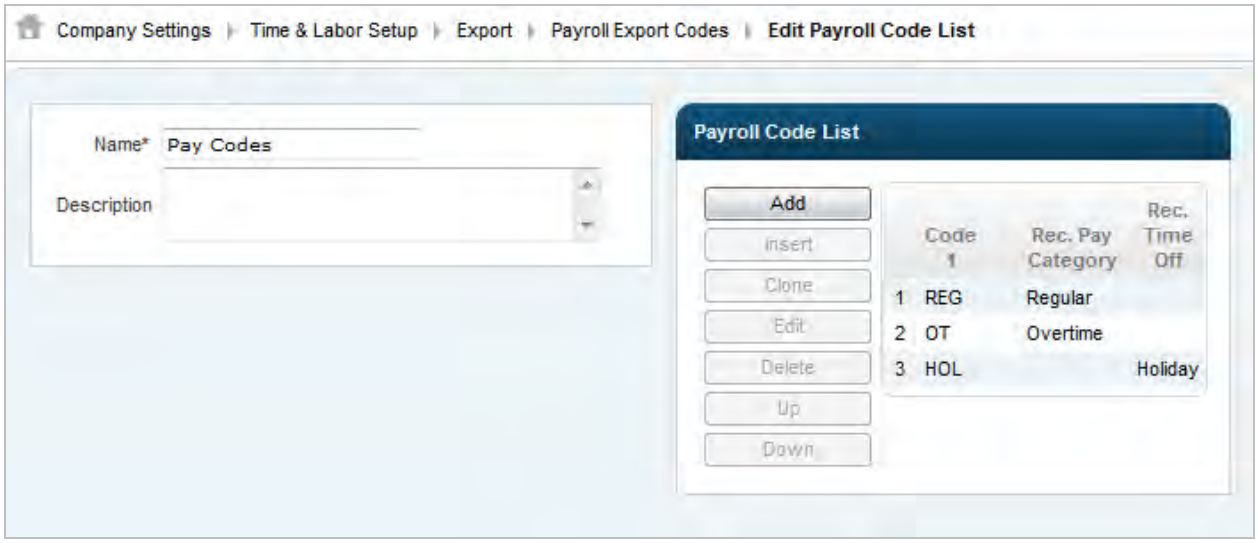
button to add a new list.

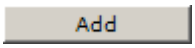
NOTE: Code List has to be saved before rate items can be added.

- **Name** - type in the name of the payroll edit code list.
- **Description** - type in a brief description of the payroll code list.

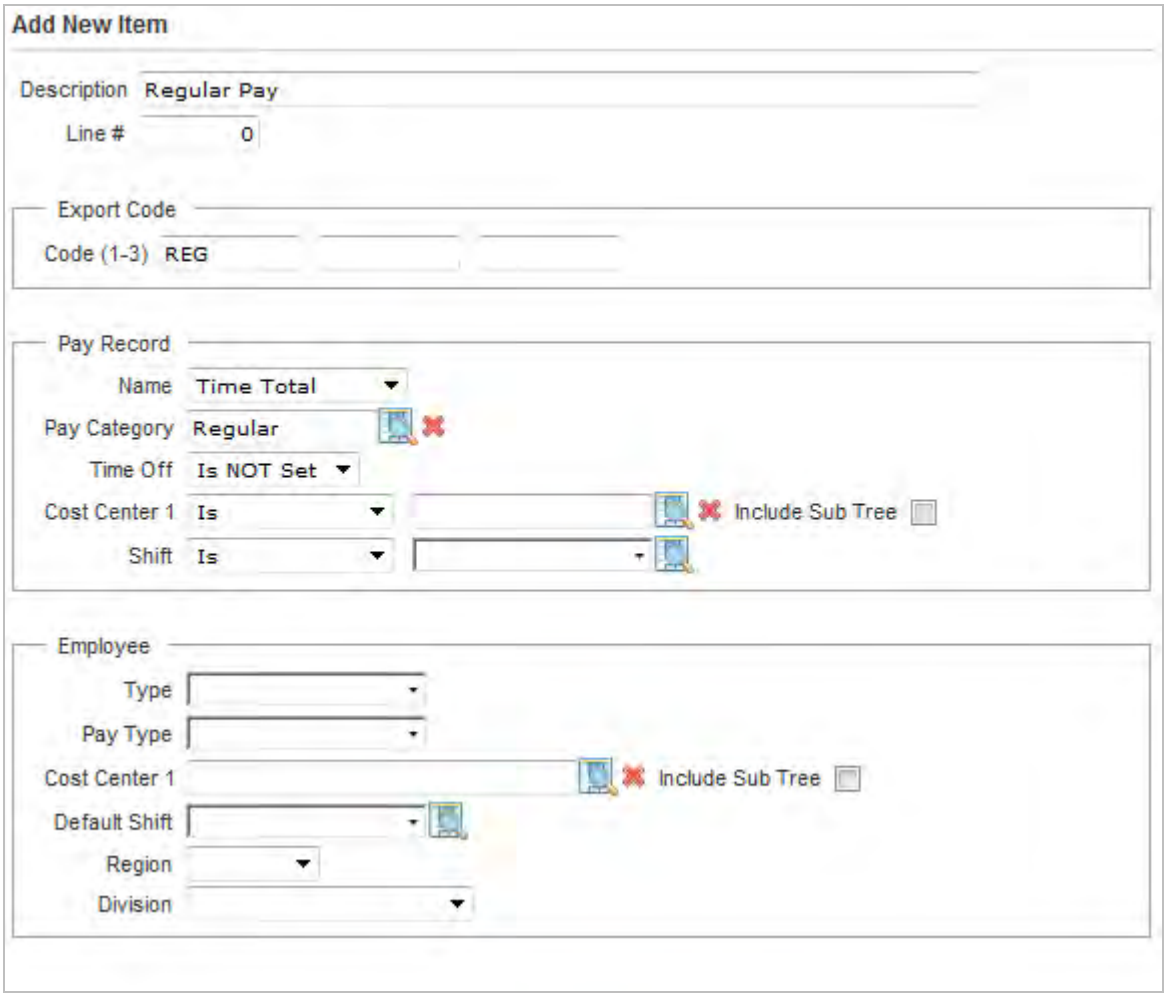
Once all the information has been completed select the

button.



a. To add a new payroll code, select the 

button.



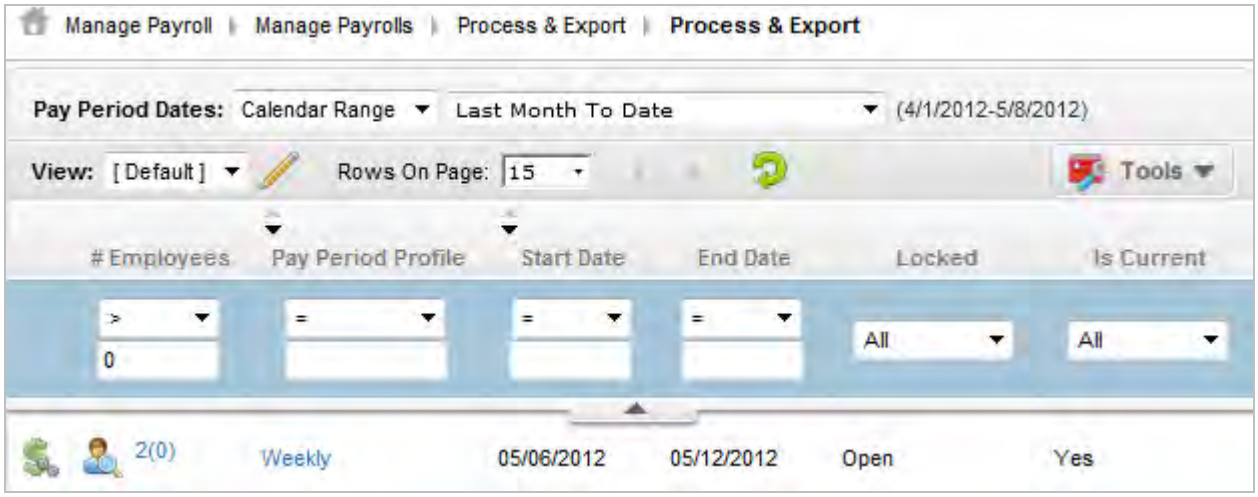
b. **Code** - type in the payroll export code.
c. **Description** - type in a brief description of the payroll export code.
d. **Line** - type in the line number of the payroll code.
e. **Pay Records -** lists the criteria that are tied to the time entries. For example, when assigning a code the system will look to a time entry to verify that it meets the criteria defined below.
   i. **Name** - the list that appears here will consist of the different records that you create within the **Pay Prep Profile**. Example: if you were summing up the extra pay total in Pay Prep, you would also see this record listed here.
   ii. **Pay Category** - select the correct pay category for the new payroll export code.
   iii. **Time Off Is** - click the button to select the correct time off category.
   iv. **Time Off Is Set** - allows you to define that <u>any</u> time off category would export as this specific code.
   v. **Time Off Is Not Set** - allows you to define that time off is not set, meaning no time off category is assigned to this time entry.
   vi. **Cost Center** - click the button to select the correct cost center.
   vii. **Include Sub Tree** - chooses if you would like the cost centers listed below the one selected to also export as this code.
   viii. **Shift** - there are five options;
      1. **Is** - click the button to select the correct shift.
      2. **Is Default** - select if you would like this code to apply only when an employee's default shift is chosen on the timesheet.
      3. **Is Not Default** - select if you would like this code to apply only when an employee's default shift is <u>not</u> chosen on the timesheet.
      4. **Is Set** - allows you to define that <u>any</u> shift would export as this specific code.
      5. **Is Not Set** - allows you to define that time off is not set, meaning no shift is assigned to this time entry.

f. **Employee -** lists the criteria that are tied to an employee's file. For example, when assigning a code the system will look to an employee's file to verify that it meets the criteria defined below.
   i. **Employee Type** - select the employee type from the drop down which should receive this code.
   ii. **Pay Type** - select the employees pay type. For example: Hourly or Salaried pay, which should receive this code.
   iii. **Cost Center 1** - select the button and choose the employee's default cost center, which should receive this code.
   iv. **Default Shift** - select the button and choose the employee's default shift, which should receive this code.

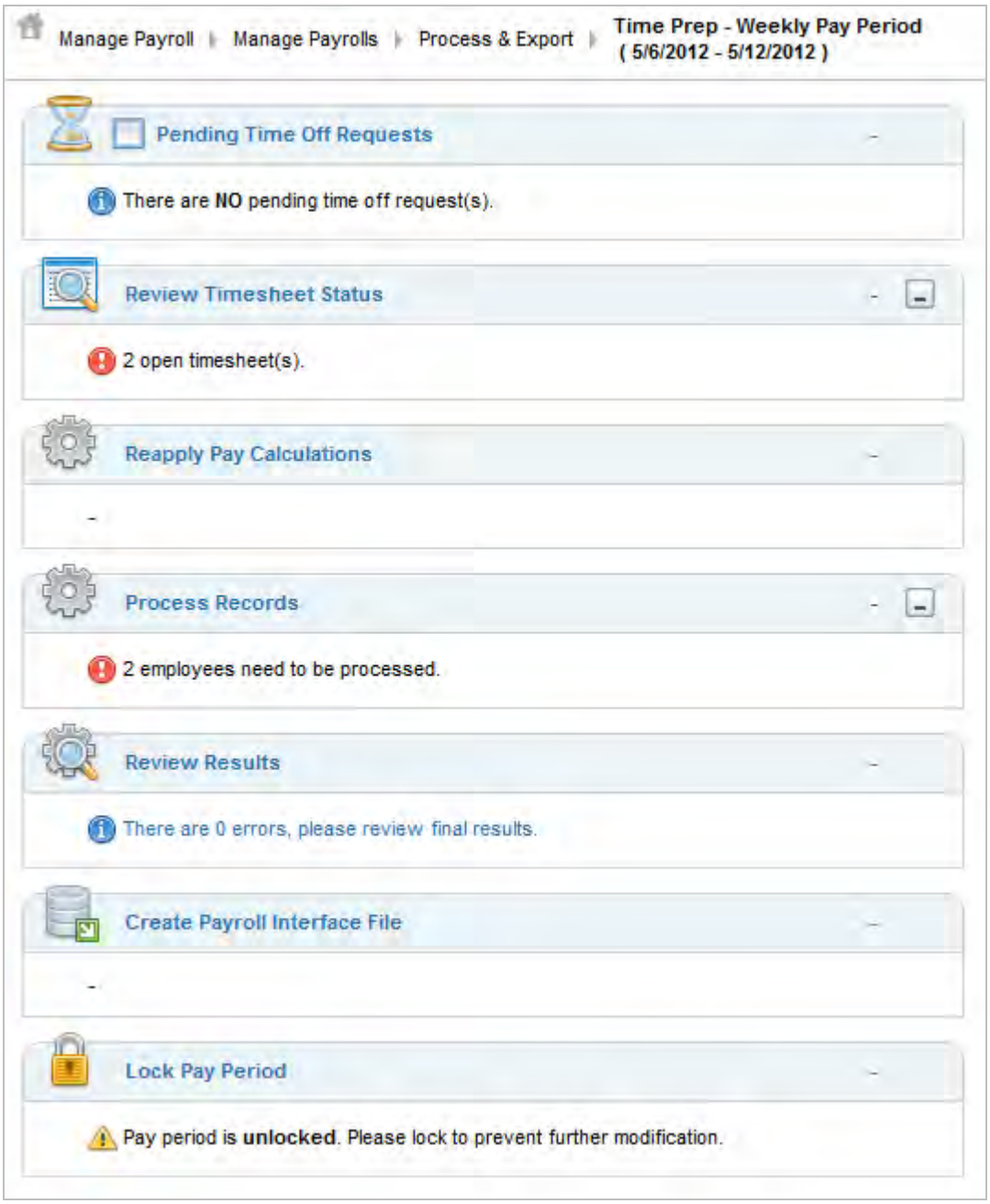
g. Once the new code information has been completely filled out select the Add button. This will add the new code to the list. Select the Save button.

To view Pay Periods:

1. Select **Manage Payroll > Manage Payrolls > Process & Export**. Here you can view all open pay periods.



2. **Pay Period Dates** - select which pay period dates you would like to view.
3. To begin the Pay Prep process, select **Manage Payrolls > Process & Export**. Click the icon next to the pay period you want to work with. The **Pay Prep Process** screen will display. The Pay Prep module allows you to apply your pay rules to timesheet data in order to prepare the data for payroll processing. Once you run Pay Prep, you can export the file to your payroll provider.
4. The **Time Prep Process** screen guides you through the six simple steps to completing the payroll preparation process:



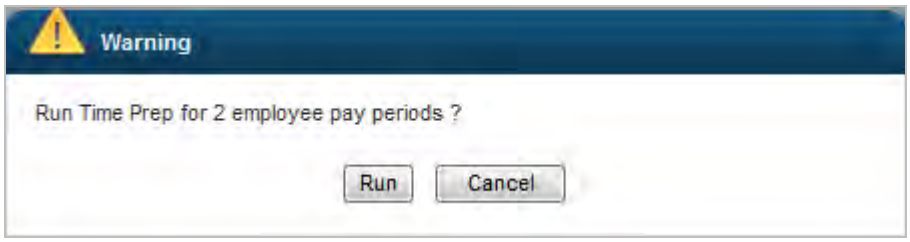
- **Pending Time Off Requests** - all pending Time Off Requests for the pay period must be resolved to ensure accurate payroll calculations.
  a. If a message appears in the first row of the **Notes** column, click **Pending Time Off Requests** to view a report containing all pending Time Off requests for this pay period.
  b. From the **All Open Time Off Requests for Pay Period** screen, you can approve or reject the pending Time Off requests.
  c. Once all pending Time Off requests have been addressed, you can click the ☐ check box to complete the step. The green check icon ☑ will display, indicating that you've completed this step.

NOTE: Clicking the ☐ check box to complete the step and getting the green check icon ☑ is **not required** to complete the Time Prep Process.

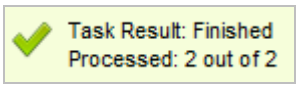
- **Review Timesheet Status -** all pending timesheets for the pay period must be resolved to ensure accurate payroll calculations.
  a. If a message appears in the second row of the **Notes** column, click the **Review Timesheet Status** button to view a report containing all pending timesheets for this pay period.
  b. From the **Unapproved Report** screen, you can approve or reject the pending timesheets.
  c. Once all pending timesheets have been addressed, you can click the check box to complete the step. The green check icon will display, indicating that you've completed this step.

- **Reapply Pay Calculations -** allows you to reapply pay calculations to all pending timesheets for the pay period to reflect any changes in payroll for the employees.

- **Process Records -** allows you to process the pay period records for all pending timesheets and used in **Calculating Payroll Hours.**
  a. If a message appears in the first row of the **Notes** column, click **Process Records** button to view a report containing all pending timesheets for this pay period.
  b. A prompt will pop up warning you that you are running Pay Prep for X employee pay periods as follows.

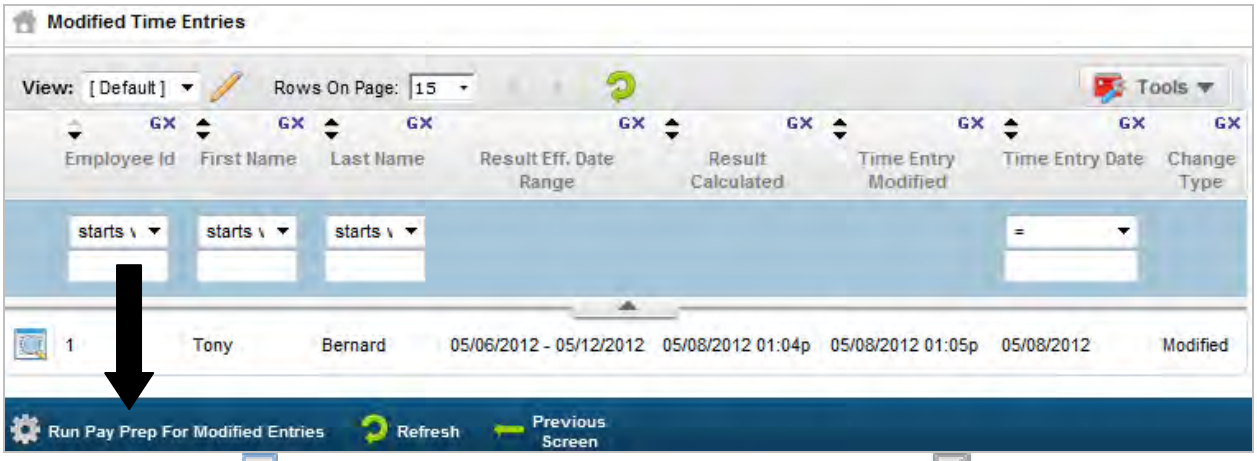


  c. Once all hours have been calculated, you will receive the following results letting you know many records were processed.



- **Review Results -** if any errors occurred during the record processing a hyper link would appear as shown below:

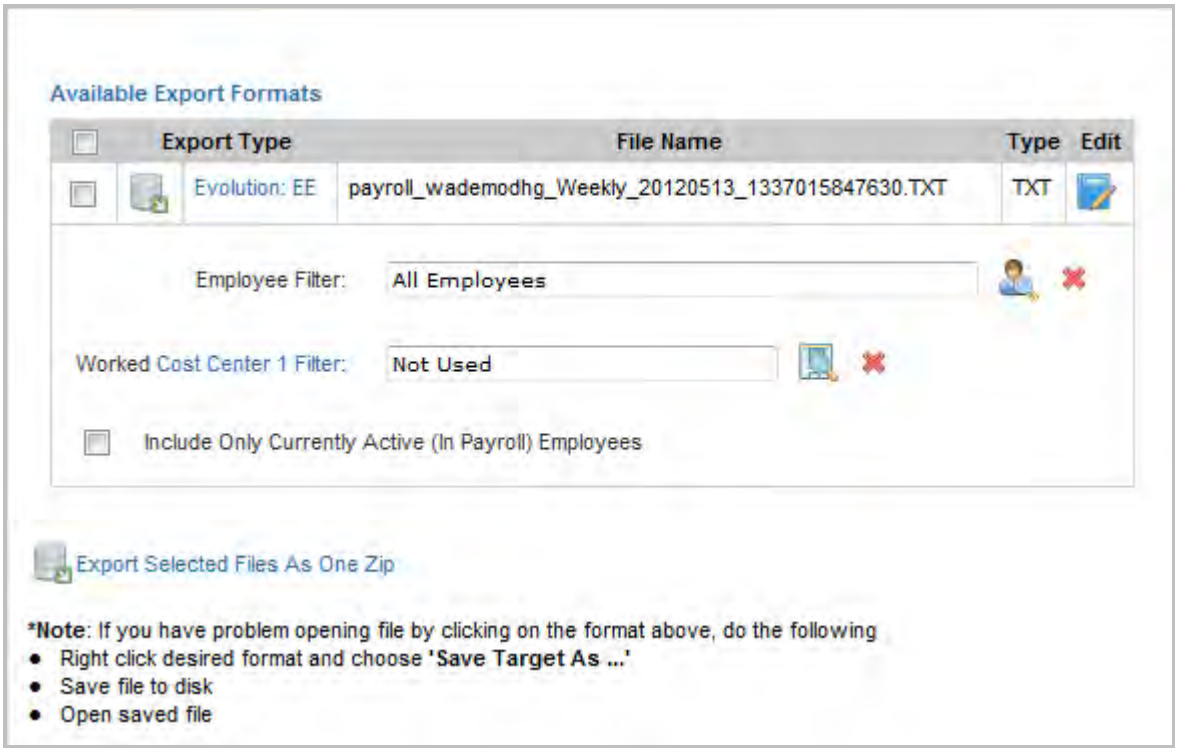
  a. Click on the blue hyperlink to view and correct all the errors in the calculated results. If any time entries were modified, you must reprocess records. Now, you can click on the hyperlink shown below in **Process Records**, to review the **Modified Time Entries**, and click the link to **# Invalid Employee Pay Prep Result(s), Due to Modified Time Entry(s).**



b. You can click the ☐ check box to complete the step. The green check icon ☑ will display, indicating that you've completed this step.
c. To review calculated hours, click **Review Results**. The screen contains the payroll calculation results for each employee.
d. On the **Time Prep** screen, click the ☐ check box to complete the step. The green check icon ☑ will display, indicating that you've completed this step.

- **Take Snapshot** - will save the results you have just processed. This result set can then be used to compare to the employee's actual hours at a later date. **Please Note:** in order to take advantage of this new functionality, you need to enable **Calculate Hours (With Estimates)** and **Take Snapshot** steps within your Admin Account, under the **Business Process Steps**.

- **Create Payroll Interface File**
  a. To generate the payroll export file, click **Create Payroll Interface File**. Click the export file name listed in the **Export Type** column. Save the payroll export file.
  b. You can also export any previous snapshots you have taken, or the difference between one snapshot vs. another using the Snapshot to Export options.



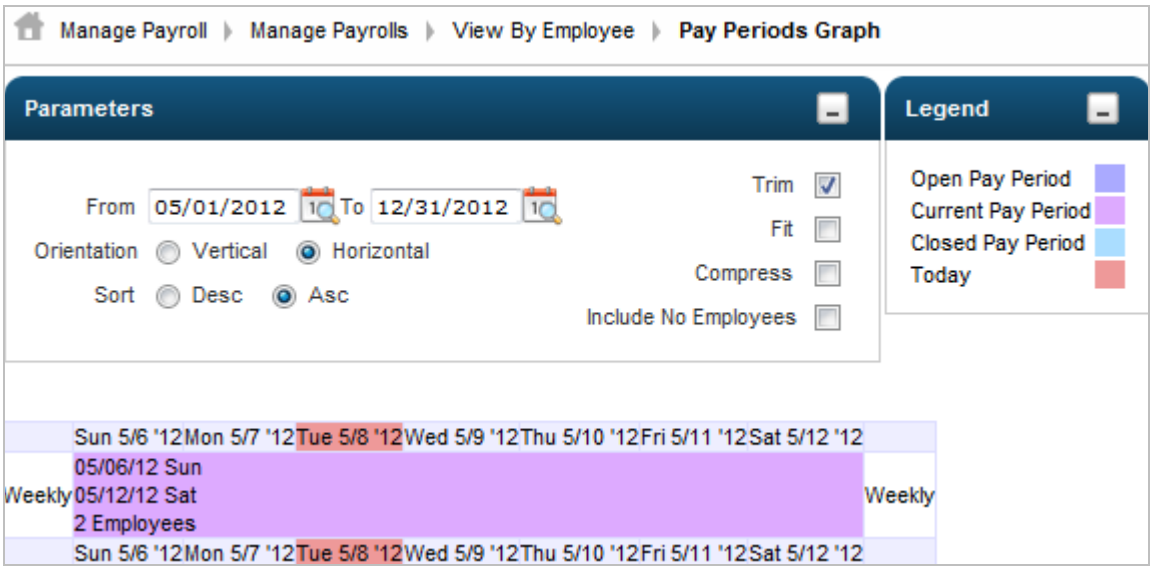
c. On the **Time Prep** screen, click the check box to complete the step. The green check icon will display, indicating that you've completed this step.

- **Lock Pay Period**
  a. To lock the pay period, simply click **Lock Pay Period**.
  b. Click the check box to complete the step. The green check icon will display, indicating that you've completed this step.
  c. Click the Previous Screen button to return to the Company Open Pay Periods screen.

5. To **View Employees Associated with this Pay Period**, select the Employees button.
   - To run time prep, select the checkbox next to the employees you would like to process, then click the Run Pay Prep button.
   - To **View Pay Prep Results**, select the employee(s) you would like to review, then click the View Pay Prep Results button.
   - To **Lock Employees**, select the employee(s) you would like to lock, then click the Lock Employees button.
   - To **Unlock an Employee** select the employee(s) and click the Unlock Employees button.
   - To **Export Pay Prep**, select the employee(s) and click the Export Pay Prep button.
   - To **Remove Employees**, select the employee(s) and the Remove Employees button.
   - To **Add Employees**, select the employee(s) and the Add Employees button.

To View All Pay Periods:

1. Select **Manage Payroll > Manage Payrolls > View All Pay Periods**. This report will show you a view of all pay periods within a specified time frame.
2. Click the View Graph button to view the **Pay Period's Graph**, as shown below.

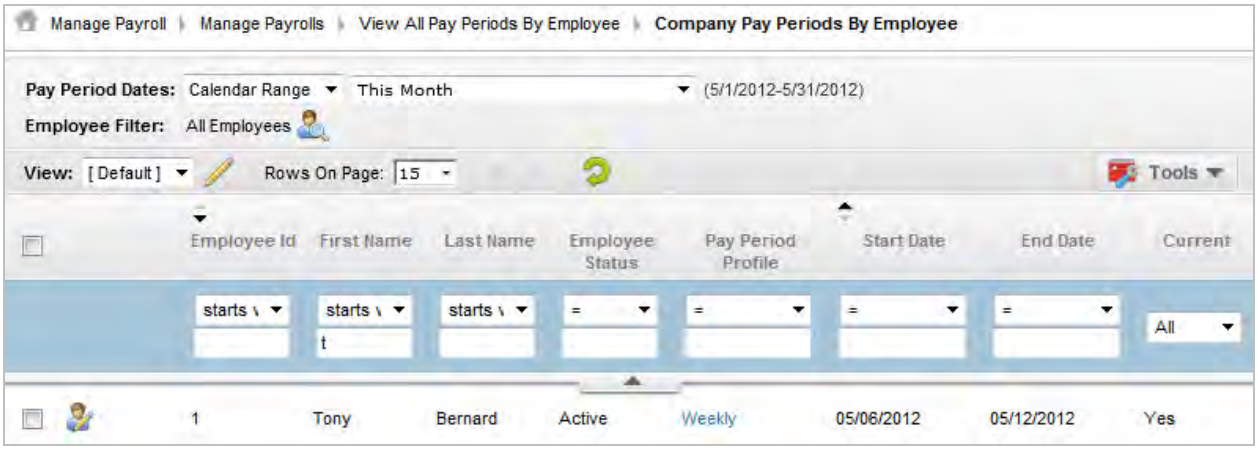


3. The image above displays the graphical view for each pay period profile.
4. Within the parameters box, you have the ability to search for a particular date range and display the graph either vertically or horizontally. You can also specify to display the graph descending (begins graph at date specified in the **To** box) or ascending (begins graph at date specified in the **From** box).

5. The options **Trim, Fit, Compress, and Include No Employees** modify the display of the graph.
6. The **Legend** box displays a color-coded explanation of the shaded graph.
7. Finally, within the graph, you are able to click the button to unlock a pay period or click the button add pay periods.

To View Pay Periods by Employees:

1. Select **Manage Payroll > Manage Payrolls > View All Pay Periods By Employees**.



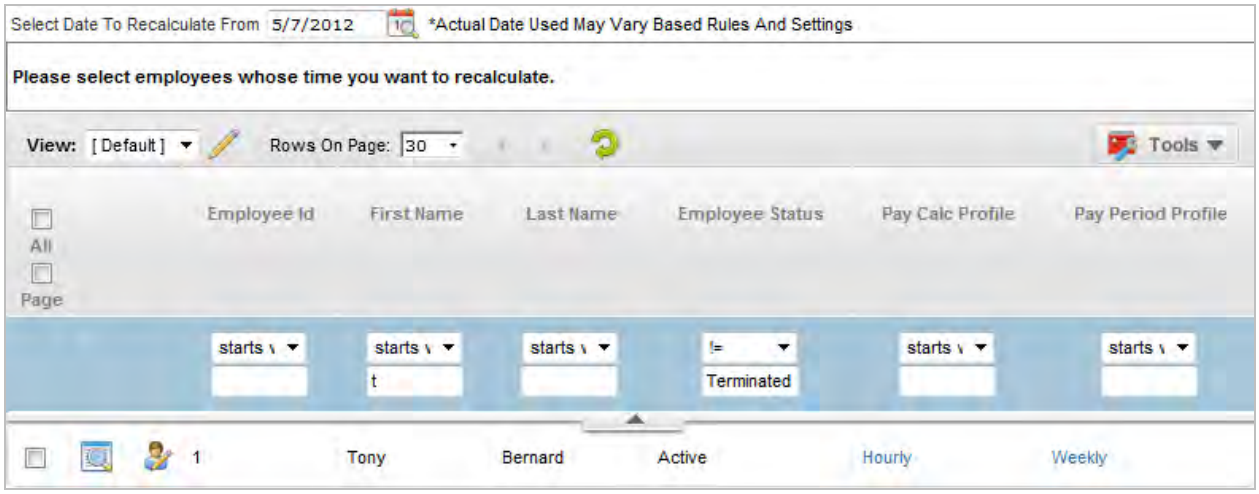
- To **Run Pay Prep**, select the checkbox next to the employees you would like to process, then click the Run Pay Prep button.
- To **View Pay Prep Results**, select the employee(s) you would like to review, then click the View Pay Prep Results button.
- To **Lock Employees**, select the employee(s) you would like to lock, then click the Lock Employees button.
- To **Unlock an Employee** select the employee(s) and click the Unlock Employees button.

To View By Employee:

1. Select **Manage Payroll > Manage Payrolls > View By Employee**. Here you can view all employees and process their payroll individually.
   - To view employee's pay periods select the button.
   - To view an employee's pay period results select the button.

To Reapply Pay Calculations:

1. Select **Manage Time > Manage Timesheets > Reapply Pay Calculations**. This feature allows for modifications to be made to the pay calculations profile, and then to recalculate timesheets on the fly.



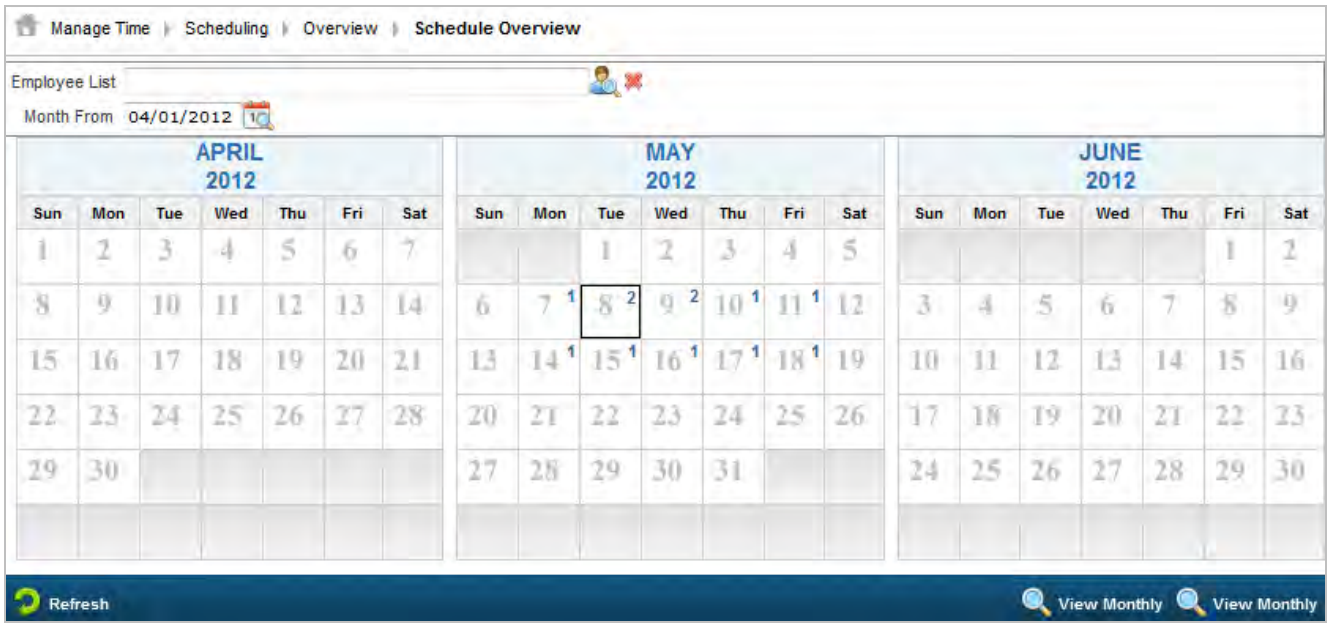
2. Select the date to recalculate from.
3. Select the checkbox next to the employees you will be reapplying a pay calculation to.
4. Select the Recalculate button.

Scheduling Functions

As a Manager it's likely you've been designated to manage some or all of your employee schedules. This section describes how to change a daily schedule and/or weekly schedule for specific days, how to mass edit schedules for several employees, how to change an employee's schedule cycle (permanent change), and how to allow an early punch in.

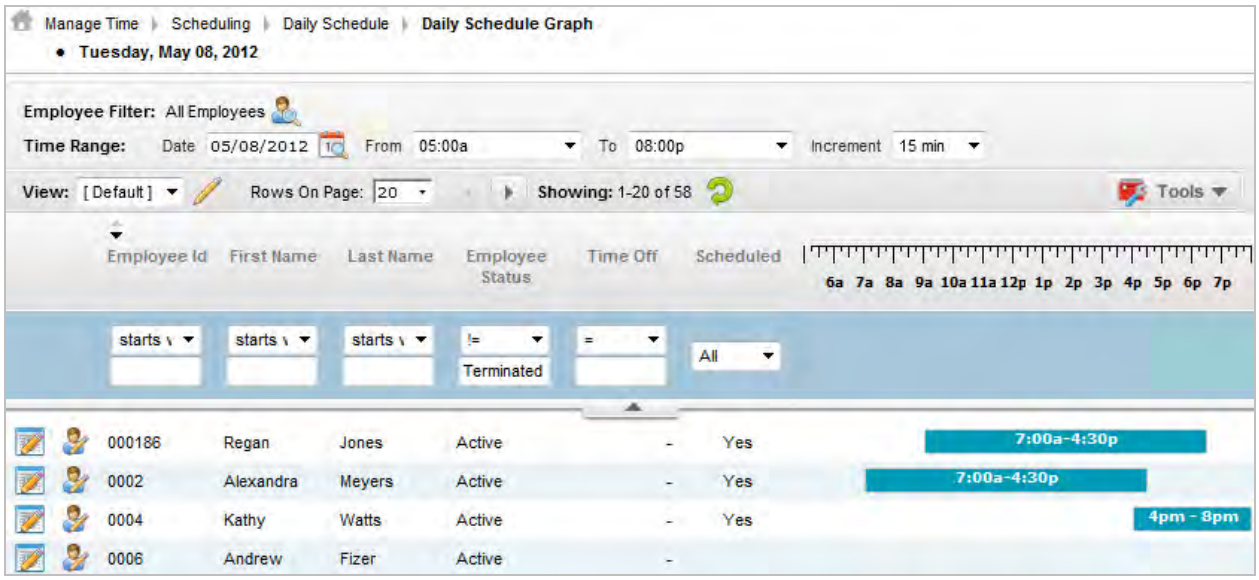
To view the employees scheduled for a particular day:

1. Select **Manage Time > Scheduling > Overview.**



2. By default, you will view all employees you have access to. To view specific employees use the button.
3. Select the particular month you would like to start viewing from using the .

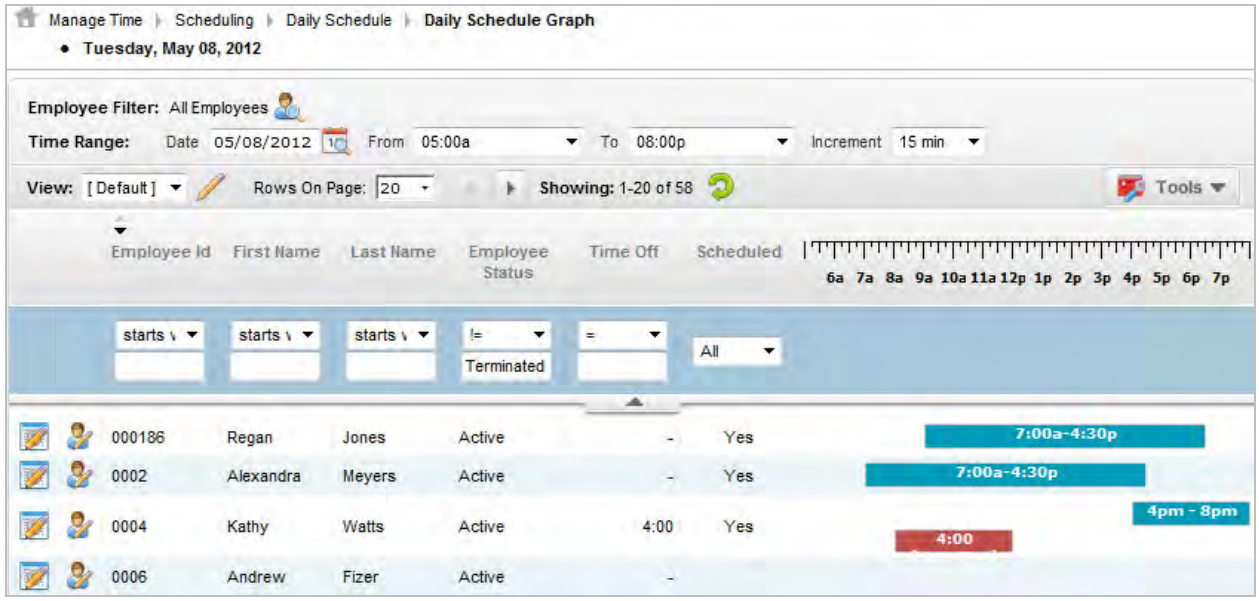
4. Then select the day by clicking on the **blue** numbers in the date. You will then be directed to the **Daily Schedule Graph** window as shown below:



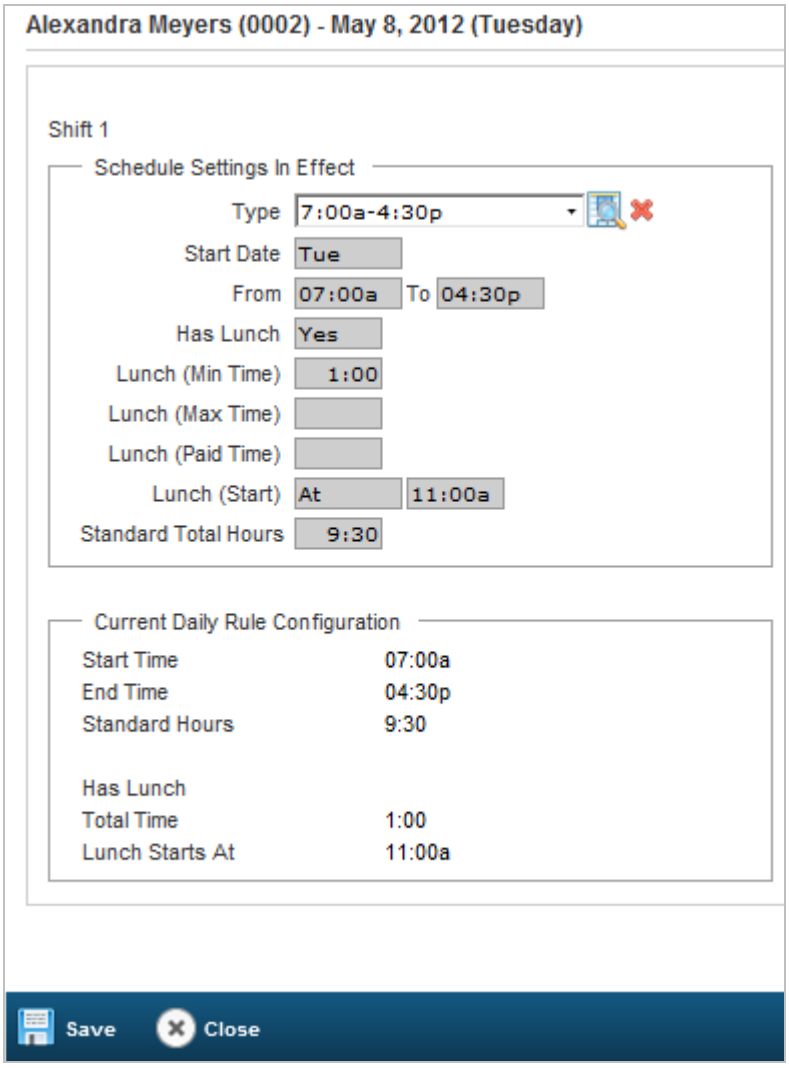
5. To create a new daily schedule select the Create New Daily Schedule button. This will take you directly to the Edit Schedule Daily Rule. Here you can create a new daily schedule.

To view or change a daily schedule:

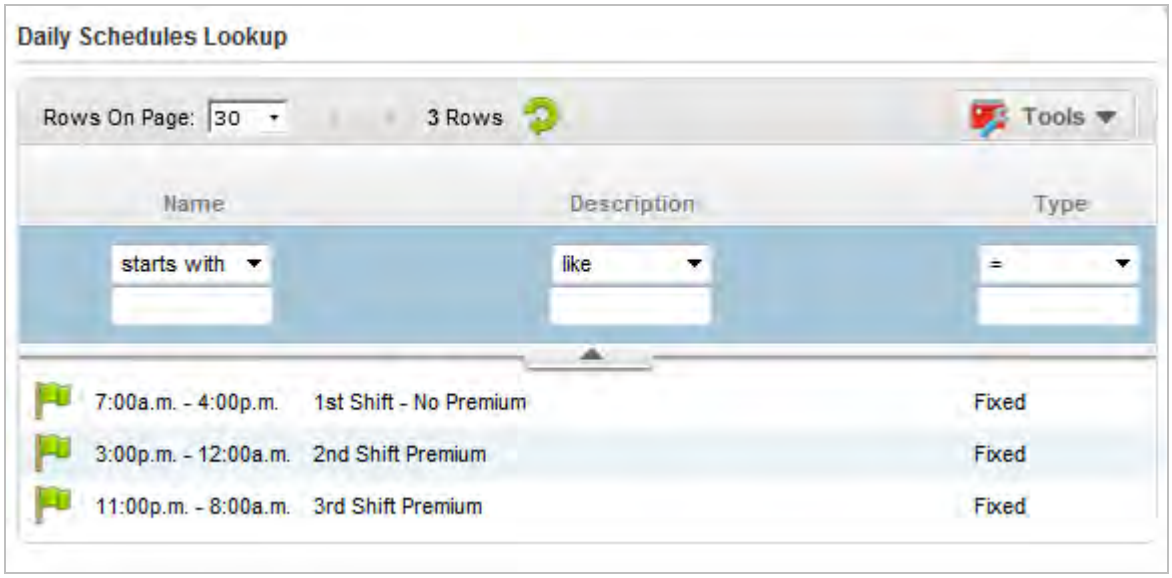
1. Select **Manage Time > Scheduling > Daily Schedule.**
2. The **Daily Schedule Graph** screen for the current date will display. Use the button view a different date.



3. The **blue** schedule bar indicates the employee's schedule for that day and the **red** schedule bar indicates any scheduled time off on that day.
4. To **Override the Schedule for that Day**, double-click the **blue** or **red** schedule bar to view the following window:



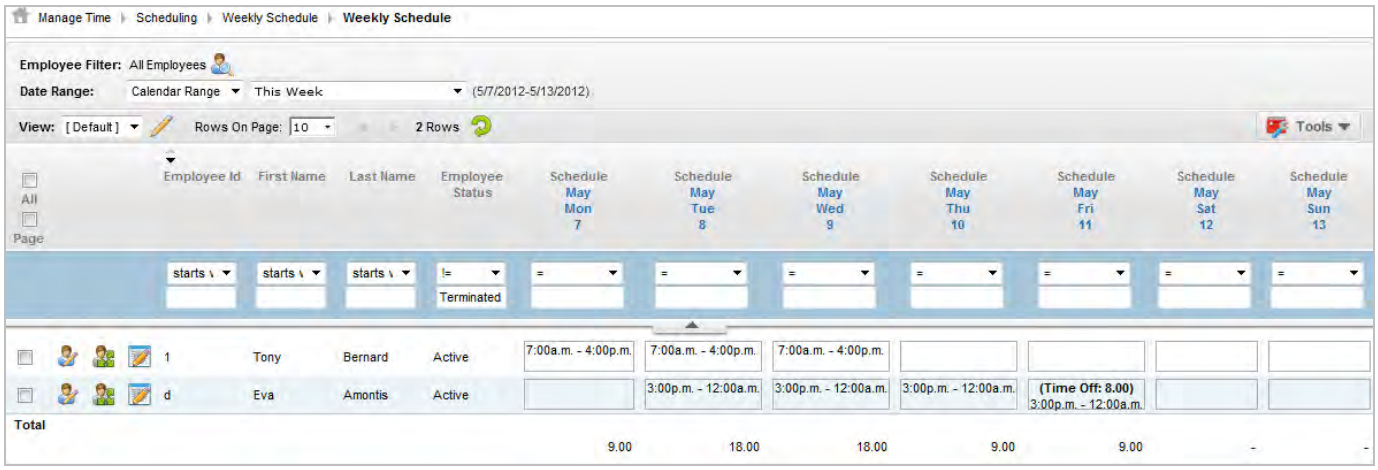
5. You then have the option to delete the existing schedule for that day, or change it to a different schedule.
6. When you click **Change**, you will then be prompted with the **Day Schedule** window, where you can select the schedule you would like to assign.



7. Choose a new **Daily Schedule** by clicking on the button to the left of the schedule name.

To change a weekly schedule:

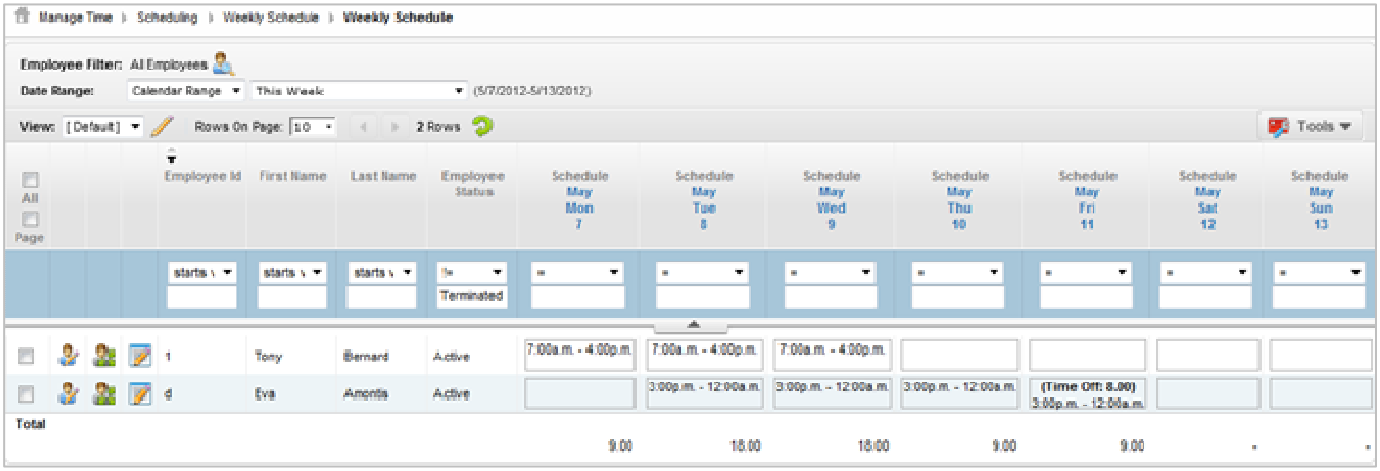
1. Select **Manage Time > Scheduling > Weekly Schedule**.



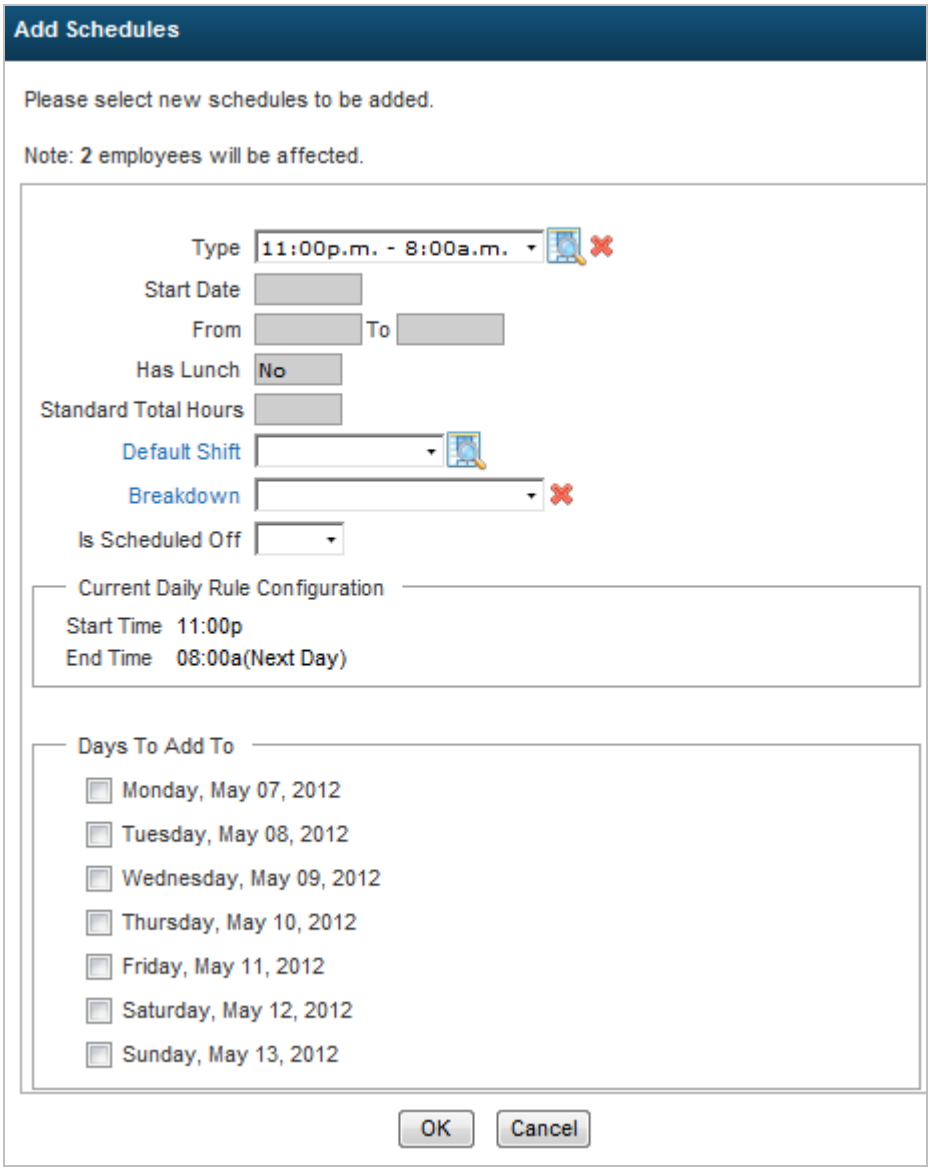
2. By default, you will view all employees you currently have access to. To display only certain employees use the button.
3. Click on the date highlighted in **blue** to take you to that particular date's **Daily Schedule**.

To mass edit several schedule entries at one time:

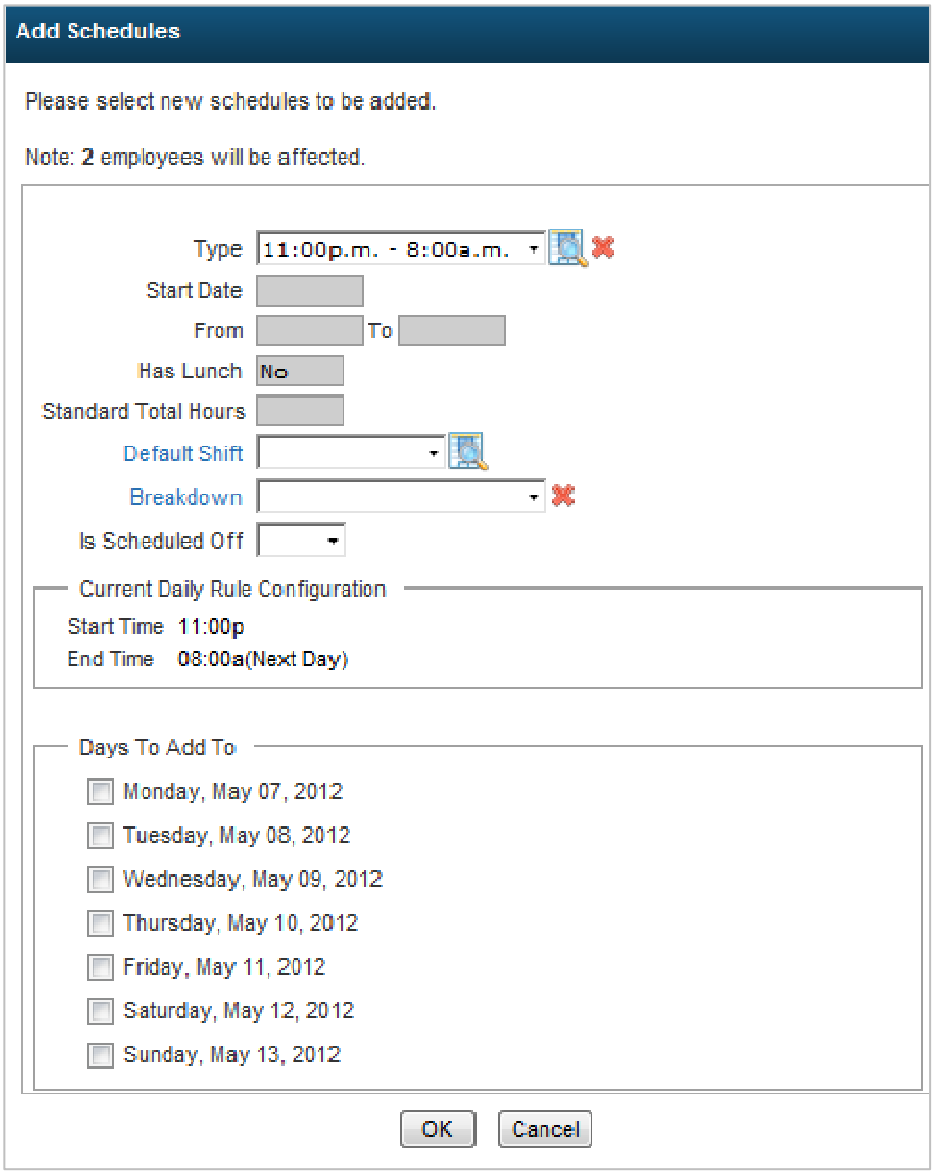
1. Select **Manage Time > Scheduling > Weekly Schedule**. The Weekly Schedule screen for the current week will display. You can change the Date Range by setting the date in the Date Field.



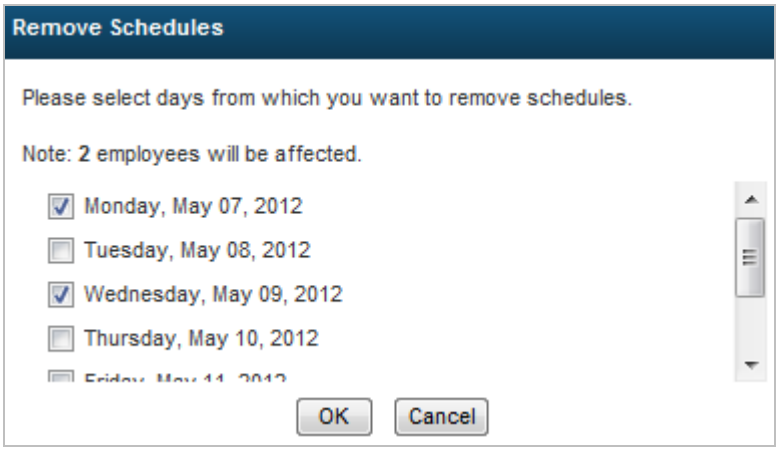
4. Click on the check box to select the employees whose schedule you would like to change.
5. Then, click on the Add Schedules to add a Schedule.
6. Within the **Add Schedules** screen, click the button to select the schedule that you want to add.



7. To replace a schedule, select the Replace Schedules button.
8. Within the **Replace Schedules** screen, click the button to select the schedule that you want to replace.

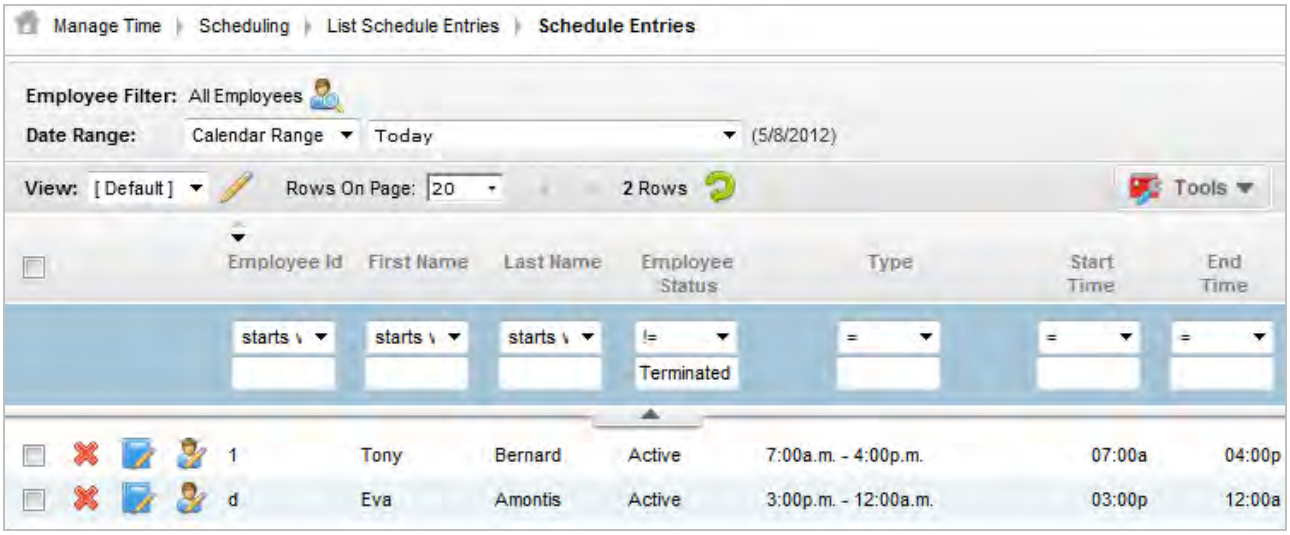


9. To delete a schedule click Remove Schedules button.
10. Within the **Remove Schedules** screen, select the checkbox for which day you want to delete.

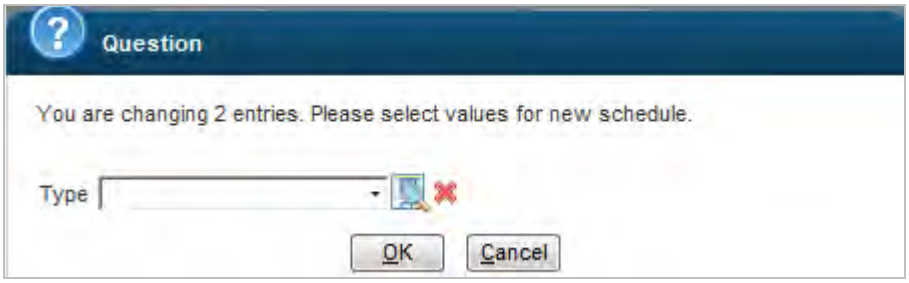


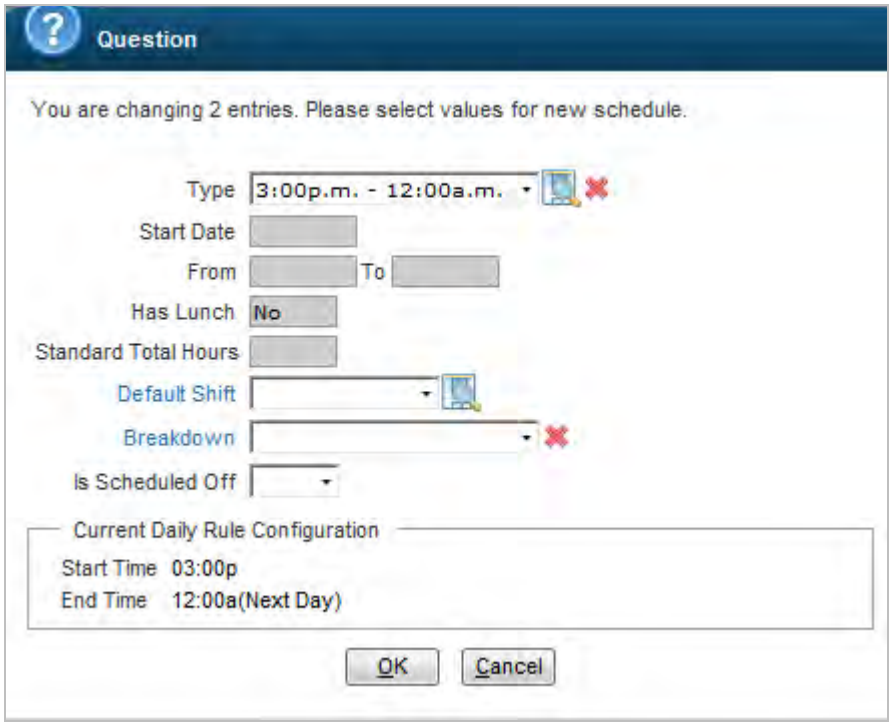
To view employee's schedule entries:

1. Select **Manage Time > Scheduling > List Schedule Entries**.



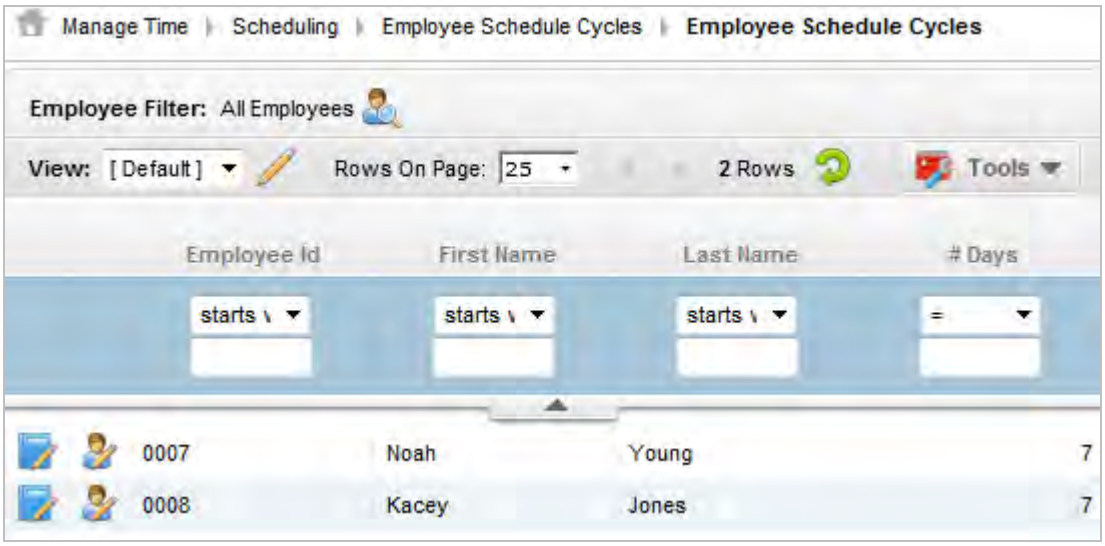
2. To edit one entry one employee's entry, click the button, and make the necessary changes.
3. To edit multiple employee entries, select those employees and click the Change Selected Entries button.
4. You will then be prompted with the **Change Schedule Entries** screen, which allows you to assign a **New Daily Schedule**.




Question
You are changing 2 entries. Please select values for new schedule.
Type
3:00p.m. - 12:00a.m.
Start Date
From
To
Has Lunch
No
Standard Total Hours
Default Shift
Breakdown
Is Scheduled Off
Current Daily Rule Configuration
Start Time 03:00p
End Time 12:00a(Next Day)
OK
Cancel

To make a permanent change to an employee's schedule cycle:

1. Select **Manage Time > Scheduling > Employee Schedule Cycles**.

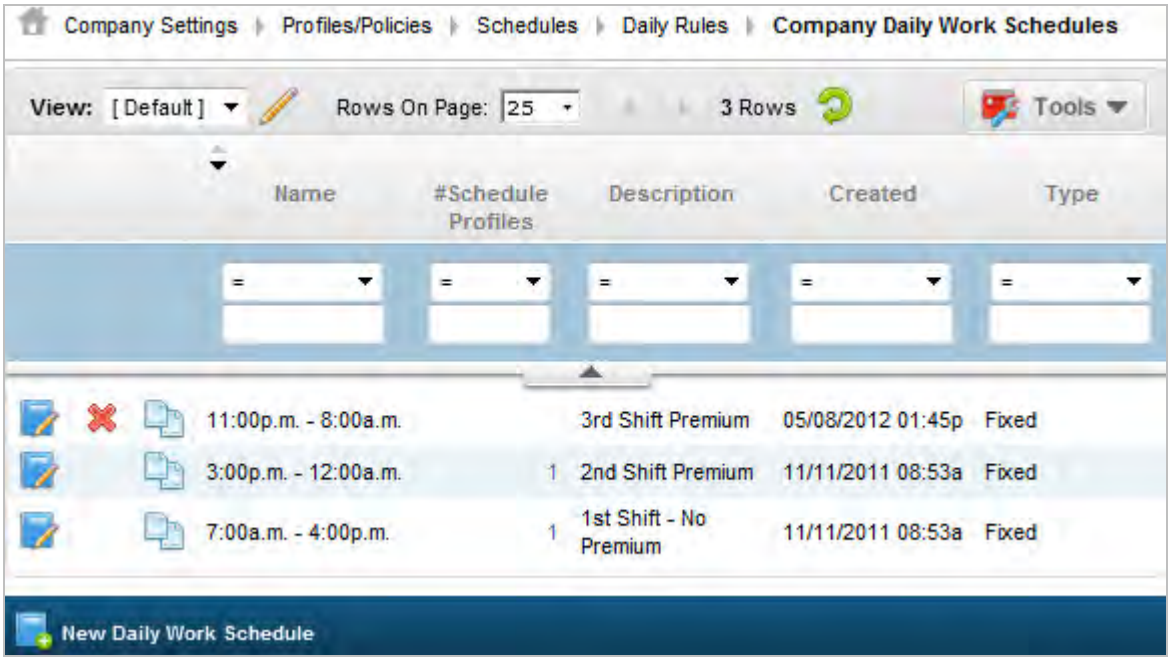


2. Click on the button for the employee schedule cycle you need to change. The **Edit Work Schedule Profile** screen will display.

3. Make changes as needed, and click on the Save button to save the permanent changes to this employee's schedule cycle.

To set up daily schedules:

1. Select **Manage Time > Scheduling > Set Up Schedules > Daily Schedules**.

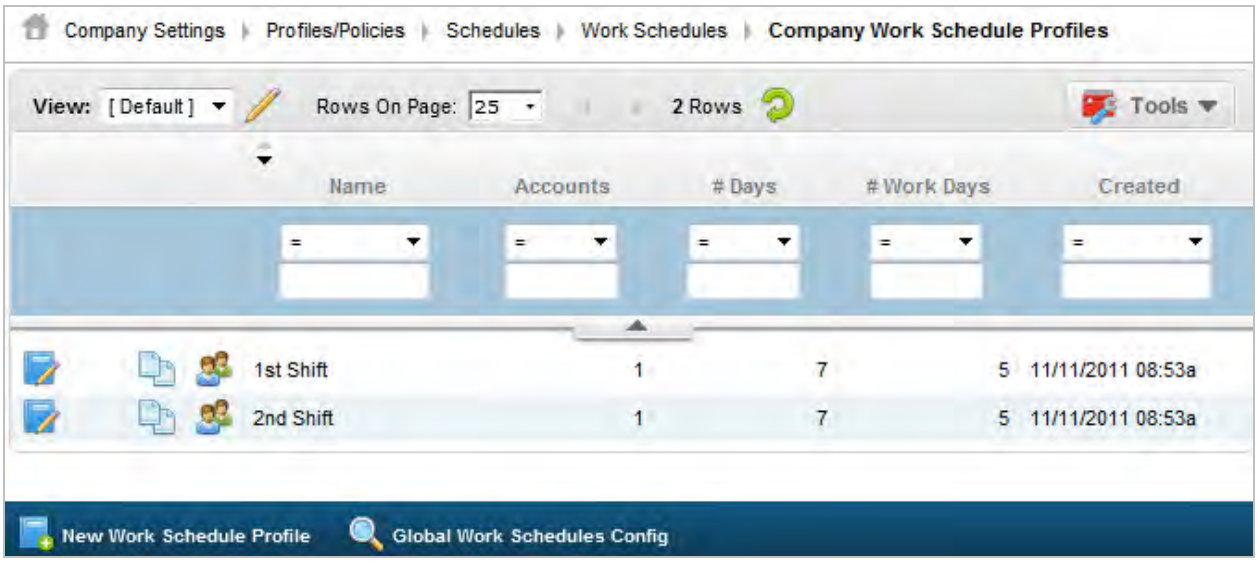


2. Click on the New Daily Work Schedule button to bring up the **Edit Daily Work Schedule** window.

3. Click the Save button when finished.

To set up employee schedule cycles:

1. Select **Manage Time > Scheduling > Set Up Schedules > Work Schedule**.



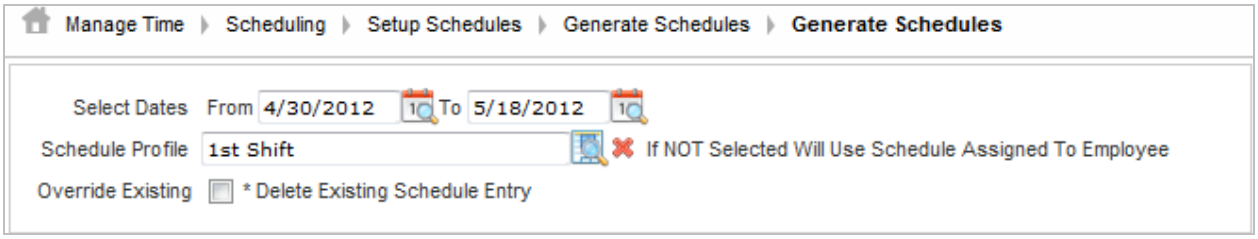
- Click on the

button to open the **Edit Work Schedule Profile** screen.
- Click the

button when finished.

To have the system generate employee schedules:

1. Select **Manage Time > Scheduling > Set Up Schedules > Generate Schedules**.

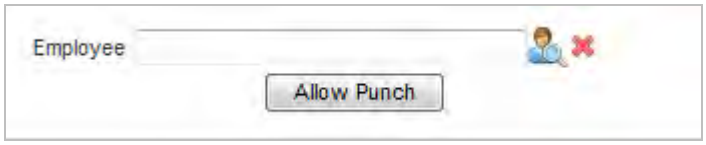


- **Select Dates** - Select the date the system will be assigning the generating the schedule for by filling **From** and **To** fields.
- **Select Profile -** Select the profile to be used by clicking the button.
- **Override Existing -** select this to override existing schedules for employees.
- From the list below, select the employees that the system generated schedule pertains to.
- Click the

button to have the system generate the new schedules.

To allow an early punch:

1. Select **Manage Time > Manage Timesheets > Early/Late Punch Override.**



2. Click on the button. The **Employee Lookup** screen will display.
3. Choose the correct employee by clicking on the button.

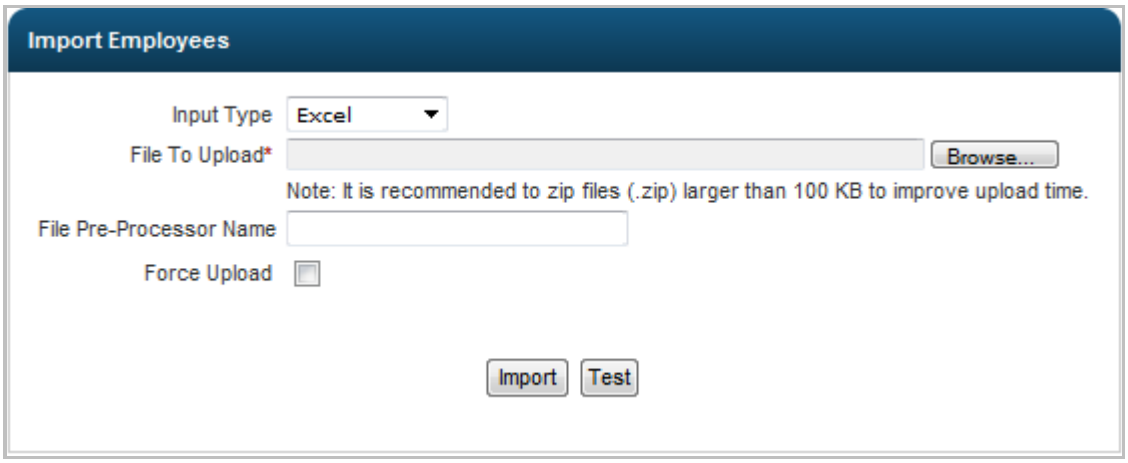
4. Click on the Allow Punch button. The employee now has 15 minutes to punch in early.

NOTE: When assigning **Daily Rules** to a **Work Schedule**, or directly to an employee, the system will only allow for two to be assigned, and they must be at least two hours apart. So, for example, an 8a to 12p and a 2p to 4p schedule would save, however, an 8a to 12p and 1p to 4p schedule would not. If Employees need to be assigned multiple schedules within one day, **Workday Breakdown** would accomplish this.

Importing

To import at the company level:

1. Select **Company Settings > Imports > Overview** to download the needed import file.
2. Once downloaded and completed, the file can be imported back under the appropriate menu path, starting under **Company Settings > Imports**.



- **Input Type** – the type of file being imported; Excel, CSV, or Excel CSV.
- **File To Upload** – the actual file to be uploaded.
- **Force Upload** – if checked, will import the entire file regardless if it has similar information from a previous upload or not.
- **Import** – selecting this will import the file, and display any warnings or errors.
- **Test** – selecting this will allow you to test the import of the file, and display any warnings or errors. You can then make any necessary changes, and Import.

Running Accruals

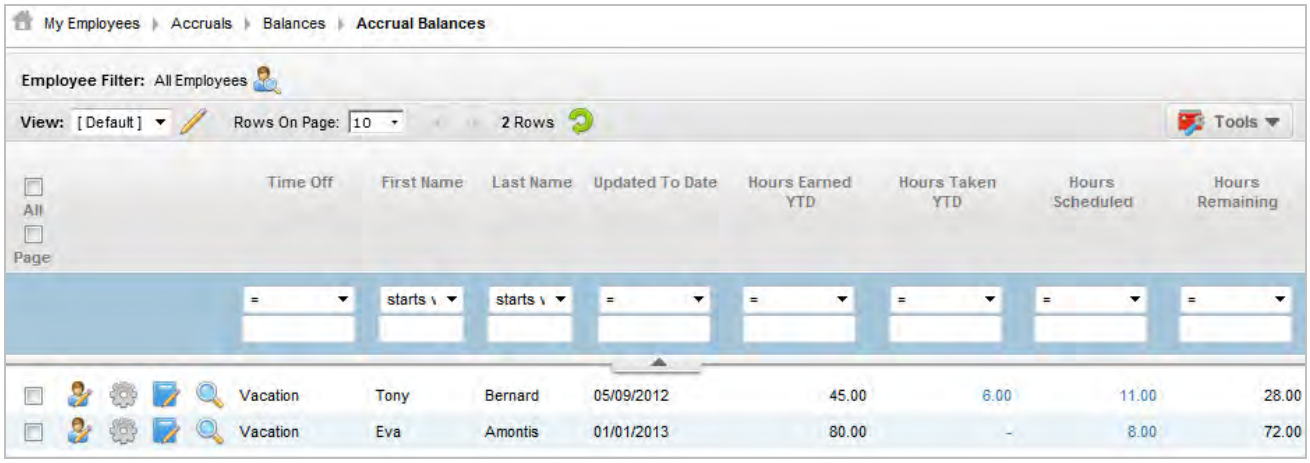
To run accruals:

1. Select **My Employees > Accruals > Run Accruals**. The **Execute Accrual Rules** screen will display. From this screen you can run accruals for all or select users:
   - To run accruals for an **Individual User**, click the button that corresponds to that user.
   - To run accruals for **Multiple Users**, select the checkbox for each user and click the Execute Accruals button.
   - To run accruals for **All Users**, click the **All** checkbox under the button and click the Execute Accruals button.
   - To run accruals for the users just shown on this screen, click the Page checkbox under the button and click the Execute Accruals button.

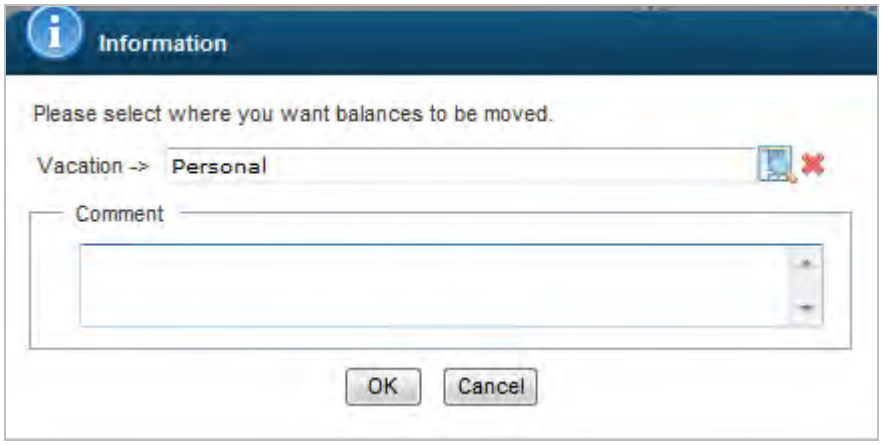
2. Indicate the **Up To Date** from which you want the accruals run.
3. Click the Execute Accruals button. The **Execute Accruals Rules - Results** are displayed on a new screen.

To View Balances:

1. Select **My Employees > Accruals > Balances**.

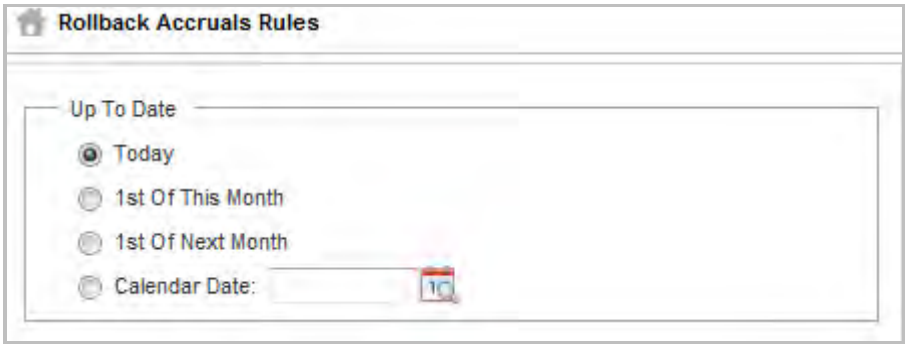


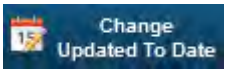
- To edit an employees information select the button.
- To execute accrual rules select button.
- To edit accrual balances select the button.
- To view an employee's history, select the button.
- To move an employee's balance, select the Move Balances button.



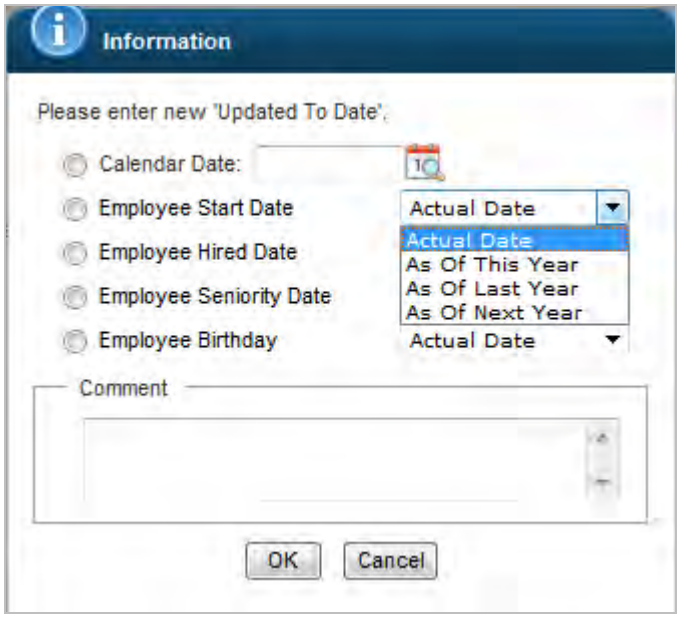
a. Select the button to choose the correct the Time Off.
b. You have the ability to write a note in the comment box.
c. Select the OK button after completing all the information.

- To roll back the accruals, select the Roll Back Accruals button. In the following screen you can specify which date you'd like to roll back to. This is similar to zeroing out, however, it will keep all of the prevoius history whereas zeroing out deletes it.



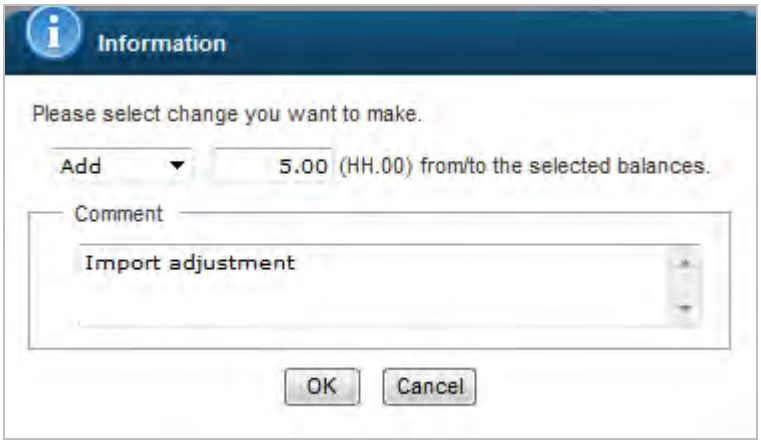
- To change the update to date, select the 

button. In the following screen you can specify which date should be considered the updated to date.

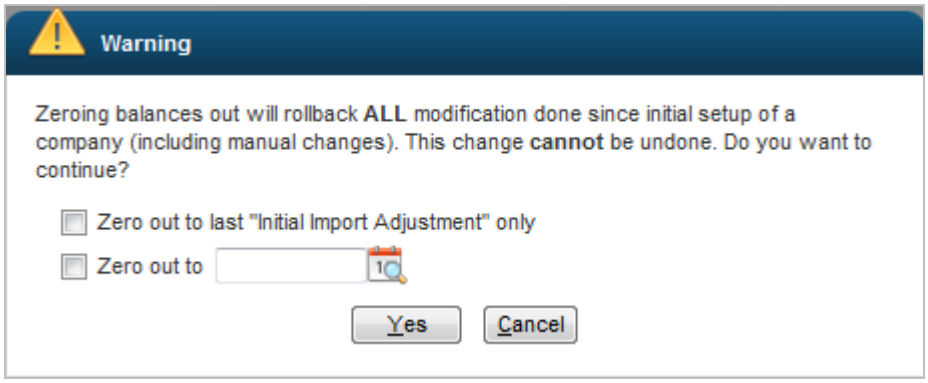


- To change a remaining balance, select the

button. In the following screen, you have the ability to **Add, Subtract, and Set** the employee's remaining balance.



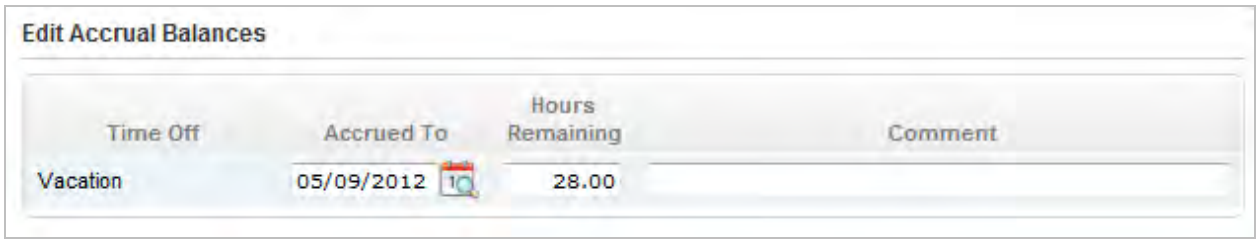
- To zero out accrual balances, select the Zero Out button.



a. **Zero Out To Last Initial Import Adjustment Only** - allows you to zero out all accrual modifications (except time off taken) up to and not including any imported values.
b. **Zero Out To [Date]** - allows you to zero out to a particular date.
c. Select the Yes button when you have completed filing out the needed information.

To modify accrual balances:

1. Select **My Employees > Accruals > Balances**. The **Accrual Balances** screen will display. From this screen you can modify accrual balances for users.
2. Click on the **Edit Accrual Balances** button for the user you want to modify. The **Edit Accrual Balances** screen will display.
3. Define the **Accrued To date** and the **Hours Remaining** for each type of **Time Off** that you need to modify. You also have the option of entering a comment to reference the reason for the modification being made.

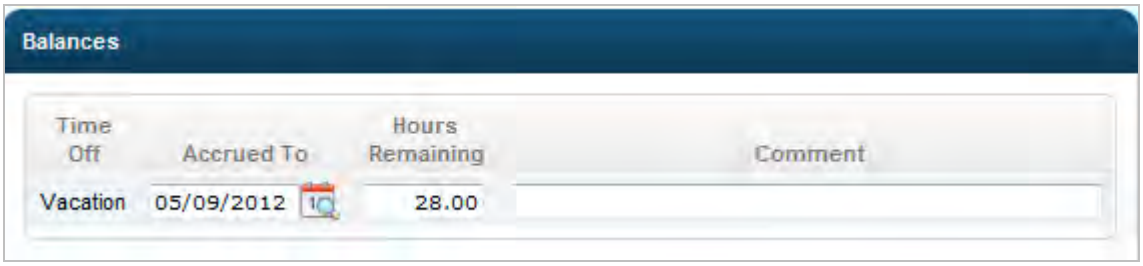


4. Click on Save button.

To modify employee hours:

1. Select **My Employees > Accruals > Modify Employee Hours**. The **Modify Employees Accrual Information** screen with display.

2. Click on the Modify Balances button for the user whose accrual hours you want to modify.

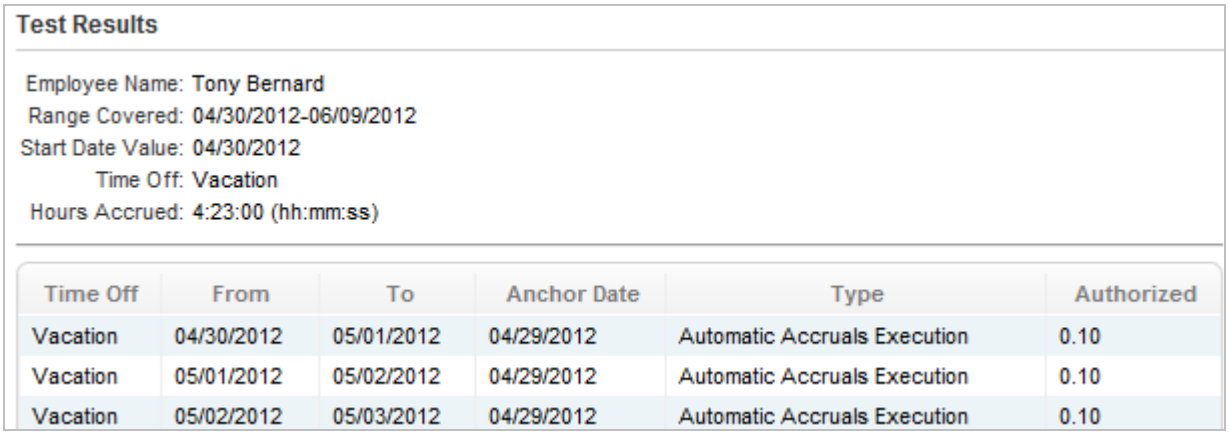


3. In the **Balances** box, correct the **Accrued To** date and the **Hours Remaining**. You also have the option of entering a comment to reference the reason for the modification being made.
4. Click on Save button.

To test benefit accrual calculations:

1. Select **My Employees > Accruals > Test Benefit Accruals Calculations.** The **Test Benefit Accruals Calculations** screen will display.
2. Define the following test criteria: **Accrual Profile, Rule, Employee,** and the **Run From, Run To** dates. If you would like to test benefit accrual calculations based on the exact date range click on the **Do not adjust execution end date** checkbox. If you would like the system to calculate benefit accruals based on the rules assigned to the individual's profile, leave it unchecked.

3. Click on the Test button.
4. A **Test Results** window will display similar to the one shown below.



To view accruals as of a specific date:

1. Select **My Employees > Accruals > Balances As Of Date**
2. When selecting a date to run, you should enter a day up to, but not including what you'd like to see. Meaning, if you're running a report in February, your date should be 3/1/09 (up to, but not including 3/1).
3. The Balances As Of Date pro-rates the employee's accruals to determine how much they would have on the date you enter. For example:
   - Your balance is 10 hours.

- You accrue 10 hours per month, on the 1st day of the month.
- We divide 10 hours by the number of days in the month to get .333 (for a month with 30 days)
- You run the balances as of date report on 3/2
- Your balance would show 10.333 hours, because the system prorates the accrual to determine how much the employee should get for that one day in March.

4. Because of this calculation, what you see under Accrual Balances will differ from what you see in Balances As Of Date.

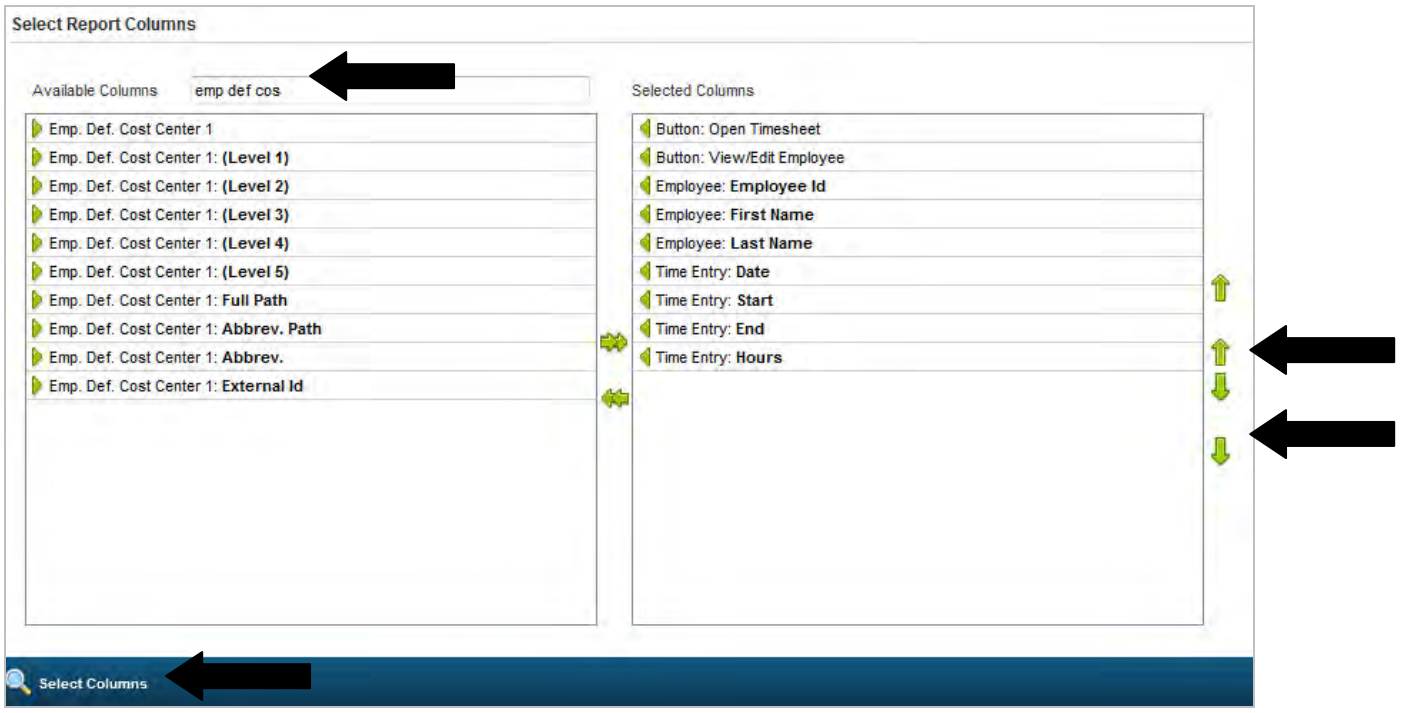
Running Reports

Web Based Time & Labor Management offers extensive reporting options and capabilities for you to gather and present labor-related data in a variety of ways. Since all Web Based Time & Labor Management reports follow similar creation procedures, general guidelines that apply to all reports are provided below.

Running Reports

To run a report:

1. Select the report you want to run from the **My Reports** menu.
2. This will launch a page for the report you selected, where you can choose the data to be included in the report.
3. Specify the date range you want to report on. You have 3 options:
   - **Calendar Range** - ex. This Year, This Month, Last Week.
   - **Date Range** - choose one calendar day to another by clicking the button.
   - **Pay Period** - choose a specific pay period (previous, current, next).
4. Use the Tools button; choose **Select Columns**, to select the data you want included in the report. The data you select will be the columns in the report output. You can set the order in which the data is presented in the columns by using the up and down arrows. Click **Select Columns** to add new columns to the report.
5. Now, within any report where you can add/remove columns, you have the ability to search **Available Columns** easily:
   - There is a entry field that allows a user to enter a key word search for the column they are looking for. Search parameters are flexible, and a user can enter in one or several key words to find a column.
   - To move the order of the selected columns you can select the large up arrow to skip a option to the top. To move a category to the bottom of the list, select the large arrow down.



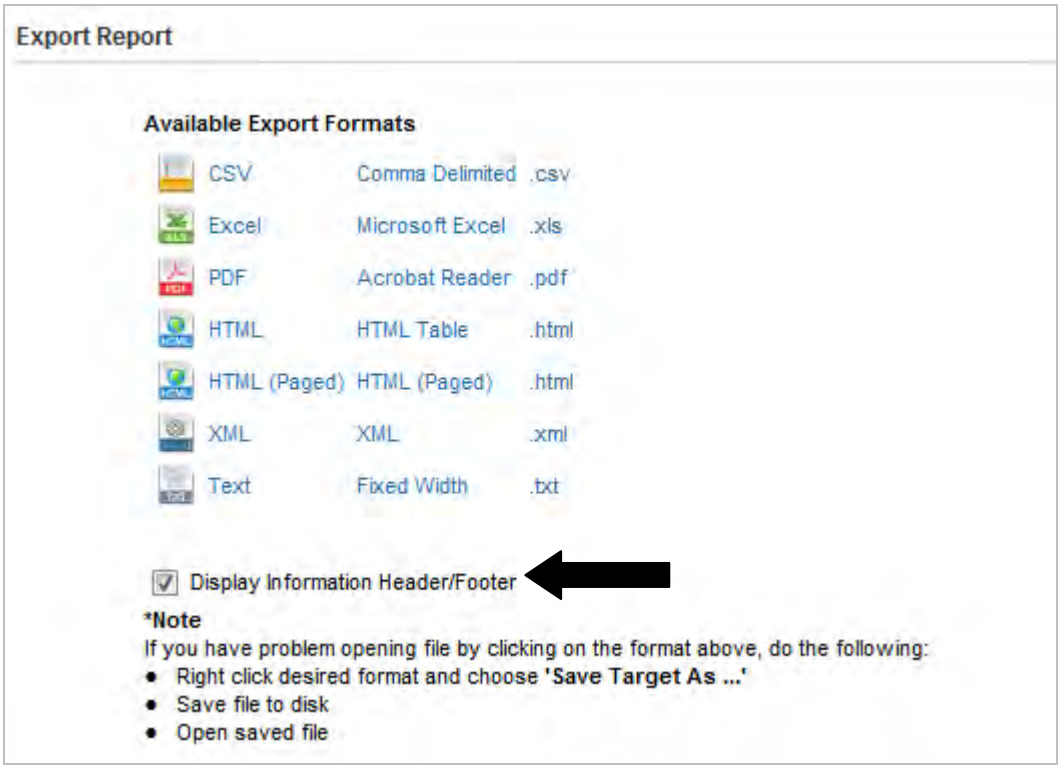
6. To format and reorganize the report output, there are several features you can use. Example: to filter specific data from the report output, you can use the filter fields at the top of the report.
7. To group information, click the **G** that appears in the top right corner of the column heading for the data type you want grouped. To remove columns from the report output, click the **X** that appears in the top right corner of the column heading.

To save report settings:

1. Select the Tools button and choose **Save Settings**.
2. Provide a name for the settings. If you want this setting to be your default report setting, click the **Default** check box, and then click the **Save** button. For any report where you have to click "Run" to execute, you have the option of overriding this setting my checking off **Run Immediately**.
3. You can easily run the report with the saved settings by clicking the Tools button and choose **Load Save Settings**.
4. Click on the button next to the setting you want to run, and the screen will update.

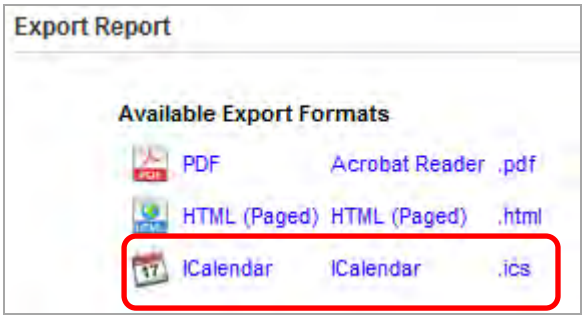
To export report output:

1. Click the Tools button and choose **Export**. OR, click the Export button. Most pages with filters offer an **Export** option that you can use to export the data to .CSV, .XLS, PDF, HTML, and XML.
2. You can also specify if you would like your report to have an **Information Header** that lists how the report is sorted, grouped, and who generated it.



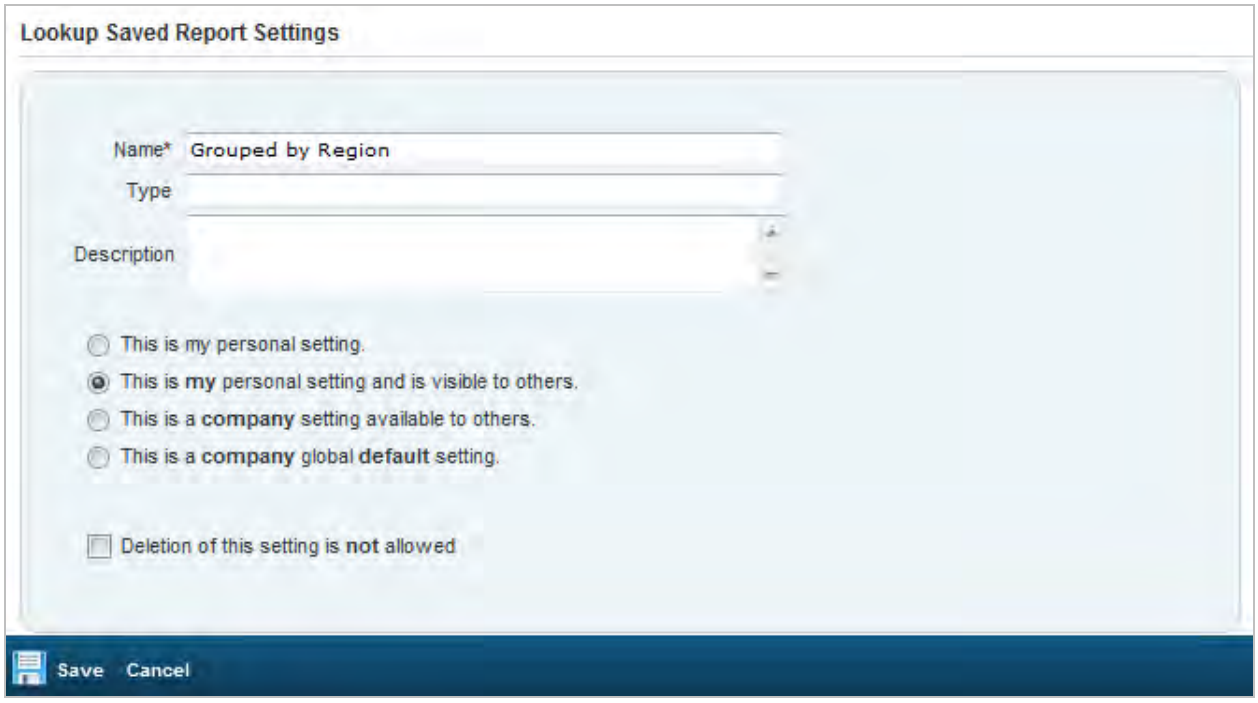
To Export Date-Specific Reports to Mail Calendar Clients:

1. Within Time Off Requests, Leave of Absence, Birthdays, Workflows, and other date-specific Reports, they can be exported from the system into mail and calendar clients (i.e. Outlook, Google Calendar, iCal). Within Reports that have the ability to export to a calendar client, after selecting the "Export" option users will select the "ICalendar" export format which can then be imported into the user's calendar(s).



To push out saved settings to others:

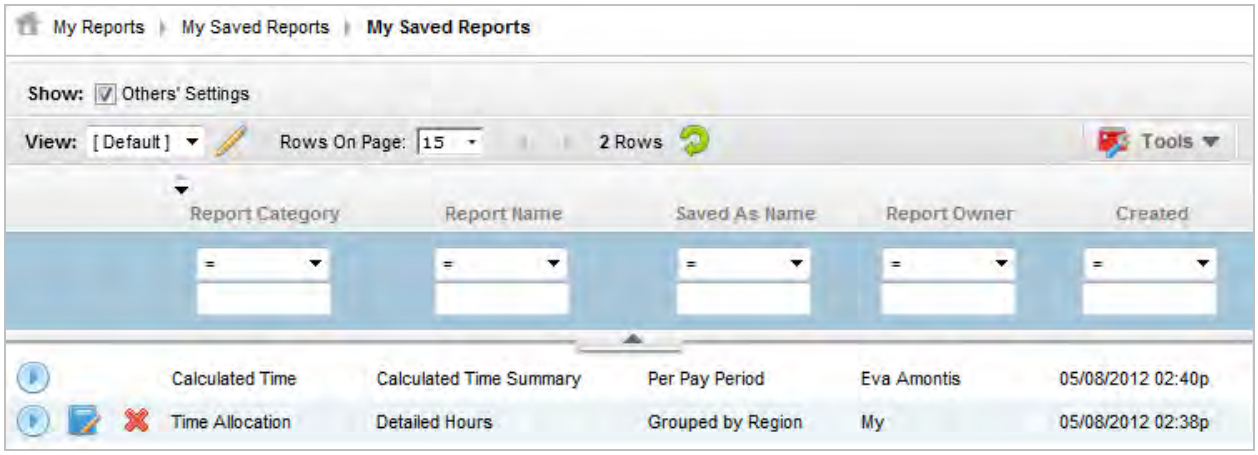
11. Go to the View: [Default] button and click on the . You will then be prompted with the **Lookup Saved Report Settings** window which provides you with four options:
    - **This is my personal setting** - allows you to designate this setting as only viewable by you.
    - **This is my personal setting and is visible to others** - allows others to see your saved settings.
    - **This is a company setting available to others** - automatically displays as available to others within the **Load Saved Settings** screen.
    - **This is a company global default setting** - makes this setting the default setting for all employees who have access to that report.



12. Select the option that applies to you and click the Save button.

To view other's report settings:

1. Under **My Reports > My Saved Reports**, you will see all Other's Settings listed. You can filter out the Report Owner column to view a specific owner.



2. Click the button to view the report.

Report Definitions

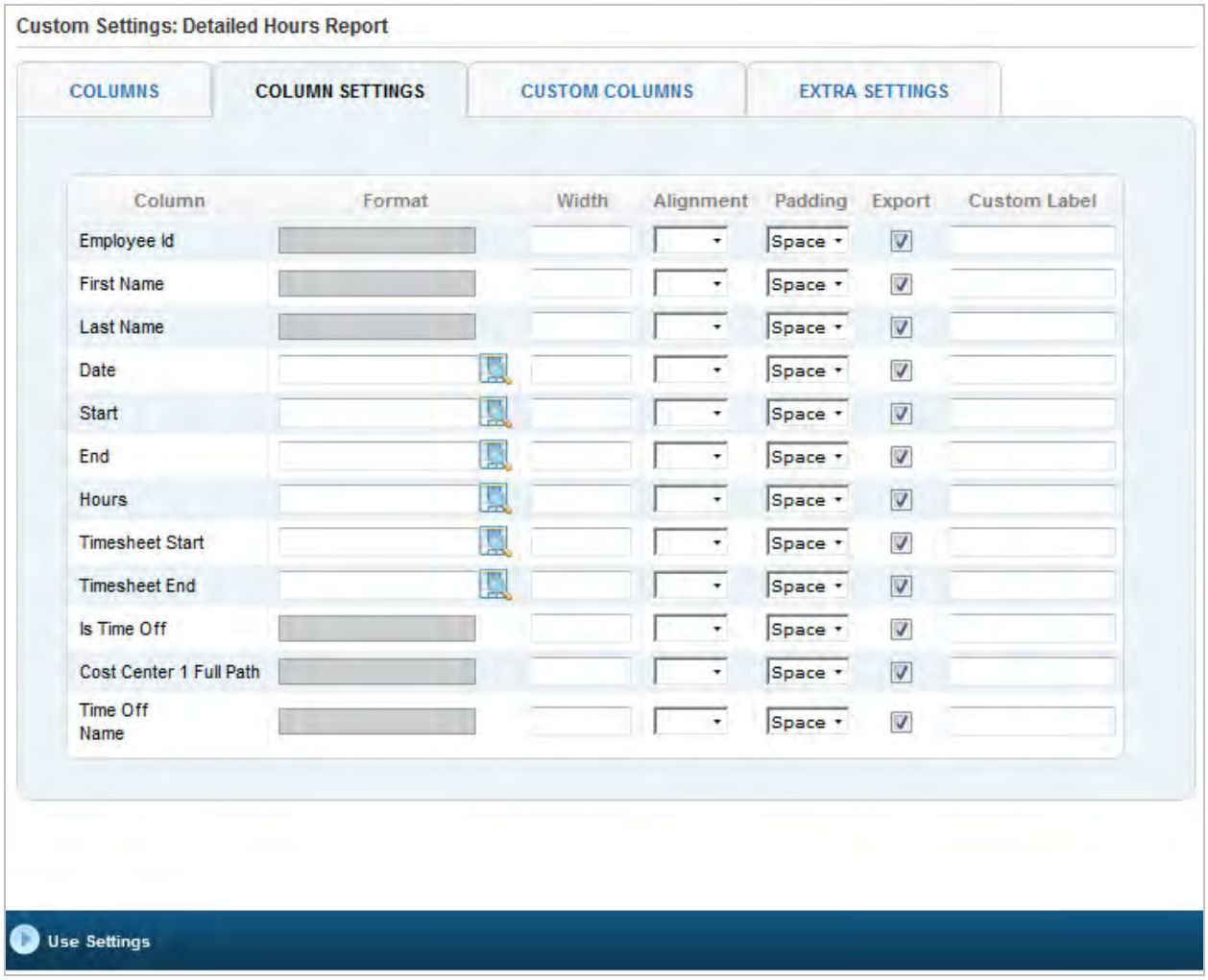
1. **My Saved Reports** - shows a list of all reports you have saved as your personal setting.
2. **HR > Employee Lists**
   - **Anniversary Calendar** - provides a calendar view of Anniversary dates for all employees you have access to.
   - **Birthday Calendar** - shows all a calendar style page with employee birthdays highlighted.
   - **Cost Centers Accessible To Employee** – provides a list of all employees and the Cost Centers they have access to.
   - **Employee Contacts** – provides a list of all employees and their personal contacts.
   - **Employee Information (Labels)** – provides a configurable list of employees and their information that can be exported and printed on labels.
   - **Employee Information (Printing)** – provides a configurable list of employees and their information that can be exported and printed.
   - **Employee Notes** – shows all employees and any notes they have associated with their accounts.
   - **Employee Roster** - shows all basic information and main settings for each employee (profiles)
   - **Employee Summary** - shows employee access to cost centers and managers assigned to them
   - **Seniority Report** - shows all employee dates (hired, started, etc.)
3. **Time & Labor > Time Allocation**
   - **Detailed Hours** - shows individual time records.
   - **Detailed Hours Overview** - calendar view of hours per person, with the ability to enable time entry approval.
   - **Summary Hours** - summary of hours based on columns chosen.
   - **Summary Hours by Employee**
   - **Summary Hours by Cost Center**
   - **Summary Hours by Day**

     These are pre-defined settings grouped by specific cost fields or date range.
   - **Summary Hours by Week**
   - **Time Off Calendar (Monthly)** - provides a monthly view of approved time off requests, with the ability to drill down weekly by clicking on the magnifying glass.
   - **Time Off Calendar (Weekly)** - provides a weekly view of approved time off requests.
   - **Time Off Calendar** – provides a yearly view of approved time off requests, with the ability to drill down daily by clicking on the hyperlink
   - **Dot Board** - shows who's in (red pin) and who's out (blue pin) as of now. Also shows who's been in during the last 24 hours (time since last in/out columns).
   - **Late/Early/Absent Report** - based on a schedule, shows whose early/late/absent.
   - **All Notes**
   - **Exceptions -** shows a more detailed view of the Exceptions.
   - **Exceptions Summary by Week -** will display, per employee, any Exceptions flagged within a specific date range, color-coded based on the Exception configuration. Then, by clicking on an Exception, you will be taken to the employee's timesheet and to the day where the Exception is flagged.
4. **Time & Labor > Calculated Time**
   - **Calculated Time Summary** - summary hours by Pay/Time off (total time)
   - **Calculated Time by Work Day** - detailed calculated time by day
   - **Detailed Calculated Time** - employee workday view separated by pay categories.

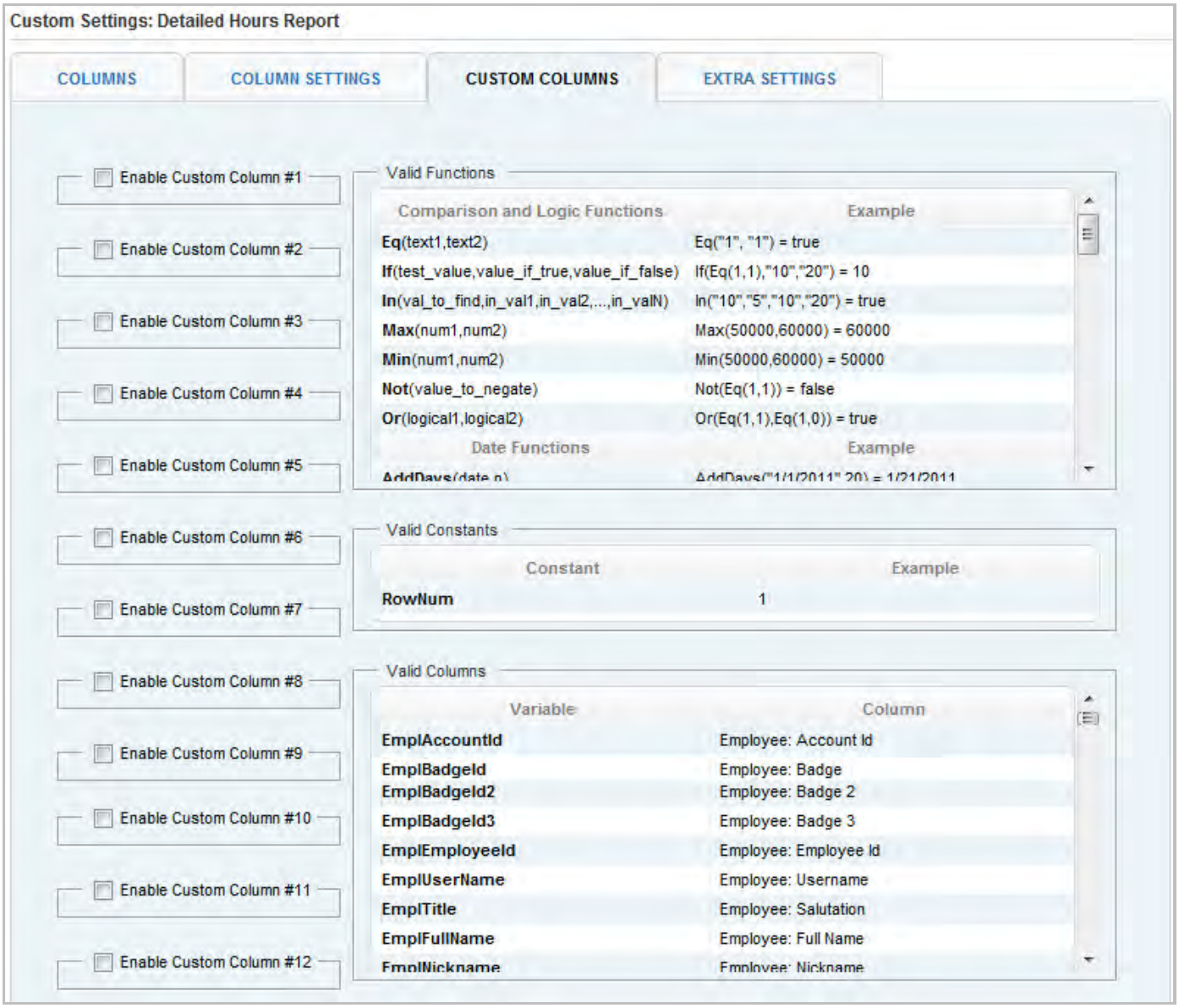
- **Calculated Time By Entry** - shows time work by employee vs. scheduled time on a daily basis
- **Calculated Time By Calendar Day** - shows employee summary hours by day.
- **Calculated Time By Employee** - shows time worked by employee vs. scheduled time on a weekly basis
- **Lunch and Breaks -** shows a summary of hours per day spent on Lunch and Breaks, both paid and unpaid.

5. **Time & Labor > Extra Pay**
   - **Detailed Extra Pay** - shows how and when an employee earned extra pay and for which pay category
   - **Extra Pay Summary** - shows all extra pay for a pay period
6. **Time & Labor > Adjustment Pay**
   - **Detailed Adjustment Pay -** shows a detailed report of adjustments made to employees pay
   - **Adjustment Pay Summery -** shows a summary report of all pay adjustments
7. **System > System Utilities**
   - **Global Access** - who logged in when and from where (IP address)
   - **Remote Device Access** - shows who opened what doors
   - **Swipe Summary** - shows employee punches and Access
   - **Unprocessed Punches -** shows a list of unprocessed punches
   - **Group Membership** - shows number of supervisors and employees per group
8. **System > Audit Trail**
   - **Timesheets** - audit of time entries by timesheet (who changed what)
   - **Time Entries** - audit of time entries
   - **Extra Pay Entries -** shows who added extra pay to employee's time sheet.
   - **Time Off Requests** - shows who has approved time off.
   - **Account Information** - all changes to account information (employee information-no logic)
9. **HR > Accruals**
   - **Balances** - per employee, per time off category being accrued. Shows number of day earned, taken, scheduled and remaining.

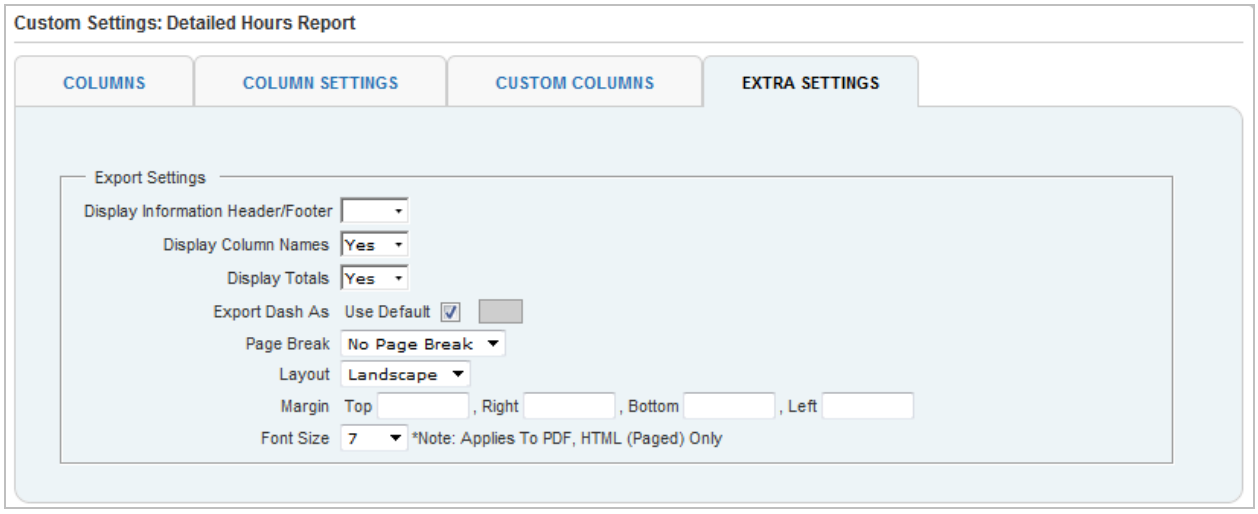
Report Custom Settings



This allows you to make modifications to the format of different columns within a report using the **Formatters** tab. In the image below, you can see that **Width, Alignment, Padding** and a **Custom Label** can be modified / added to the any column within a report. **Format** is available within select columns, those containing dates, hours, dollar amounts, etc. You can also select which columns you'd like to include when exporting the Report.



Also, you have the ability to enable up to 20 **custom columns**, using the valid functions and preexisting columns listed above.



Also, you have the ability to include / exclude the **Report Header**, and define a page break when the report is being exported.

Troubleshooting Connectivity

In the event that you are experiencing slowness or connectivity issues with the web application, the following steps can be completed in order to better diagnose the issue.

First confirm the following:
- Is the issue isolated to one individual? One computer?
- Is there a particular time of the day when you experience the issue?
- What actions are you performing when you receive this slowness/down time issue (i.e. running reports)?
- Is the system just slow, or are you receiving a “Page Cannot Be Displayed” error?
- Do you have an issue accessing other websites?

Then complete these steps:

STEP ONE:
- Please go to http://saashr.com/ta/jspSystemTools/OpenTestRoundTrip.jsp.
- This will allow us to test the speed of the connection to us.
- In the data size fields, enter 1000, and then click the new round trip test button. Take a screenshot of the result.

STEP TWO:
In addition to the speed test below also run a tracert the next time you experience some slowness. Here's what you need to do:
- On a computer that is experiencing this issue, go to your Start Menu > then Run. Type in cmd.
- In the Command window, type in tracert saashr.com (or saas.com, entertimeonline.com, depending on the domain you use) and press ENTER.
- You should see similar results as the example below:

_____

Result:

Tracing route to saashr.com [216.12.130.234] over a maximum of 30 hops:

1 <1 ms <1 ms <1 ms 10.132.1.1
2 1 ms 1 ms 1 ms 64-144-91-177.client.dsl.net [64.144.91.177]
3 10 ms 15 ms 15 ms 172.16.4.42
4 14 ms 10 ms 15 ms cr01-nyc02-g0-2-0-200.dsl.net [216.184.170.198]

5 11 ms 15 ms 15 ms unknown.level3.net [209.246.123.185]
6 11 ms 15 ms 15 ms ae-12-53.car2.newyork1.level3.net [4.68.97.85]
7 20 ms 25 ms 20 ms te-7-4.wch010.nycmny2.level3.net [4.68.110.22]
8 30 ms 19 ms 20 ms 64.200.249.149
9 16 ms 20 ms 25 ms hrndva1wcx2.wcg.net [64.200.210.178]
10 18 ms 20 ms 24 ms hrndva1wcx1-pos6-0-oc48.wcg.net [64.200.89.129]
11 * * * Request timed out.
12 * * * Request timed out.

- Once you see Request times out, please take a screen shot of the window.

- Please complete 3 separate tracert's and take a screen shot of each.

- All screen shots can be forwarded to support@saashr.com.

Your results will allow us to test your speed connectivity and confirm where exactly the breakdown is, if any.

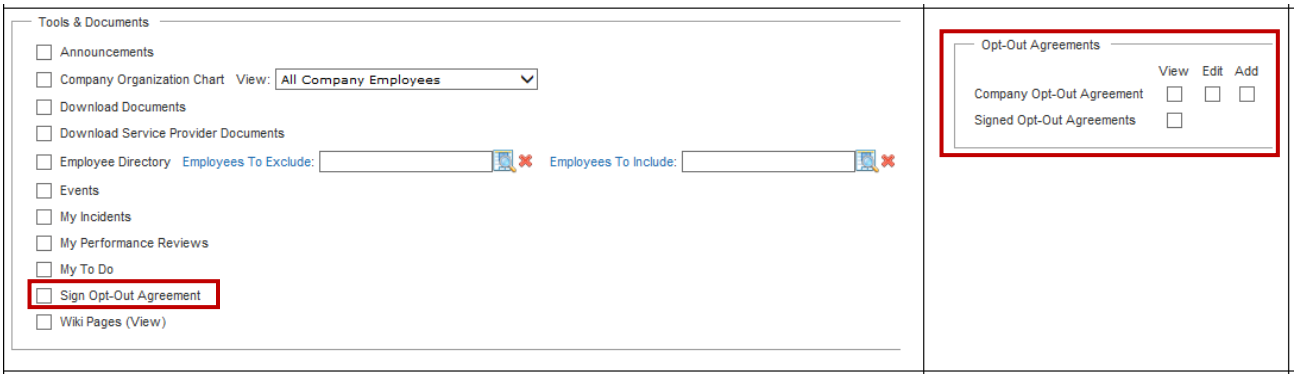
NOTE: You can also access the Internet Health Report [http://internethealthreport.com] to view connectivity on the internet in general. Any blocks highlighted in red or yellow indicate a potential issue. Please note – this is NOT specific to our system, but rather specific to the path the user takes in order to connect to our server.

European Market Features

The features described below are available to all companies, and have been added in order to assist with laws and rule requirements of European companies (but they can be utilized for any company with TLM enabled).

Overtime Opt-Out Management

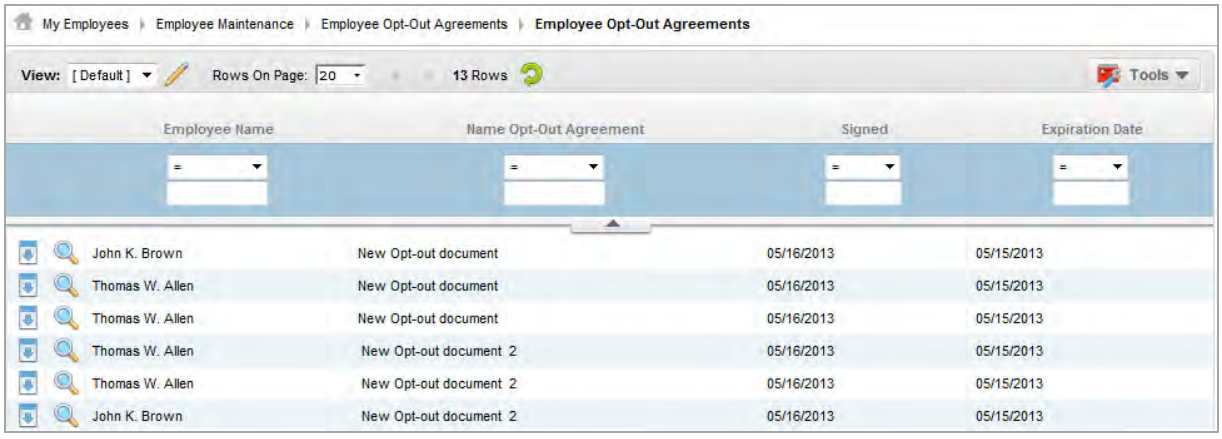
Within **Company Settings > Profiles/Policies > Security Profile**, Opt-Out Management will need to be enabled within the T&A as well as ESS Tabs to ensure the company and employees have the appropriate access to view, edit, add, sign, and/or delete the Agreements.



Employees will have the ability to view and sign an Opt-Out Agreement under **My Account > My Opt-Out Agreement**. The signed agreement can be downloaded, renewed, or cancelled from within this screen as well.

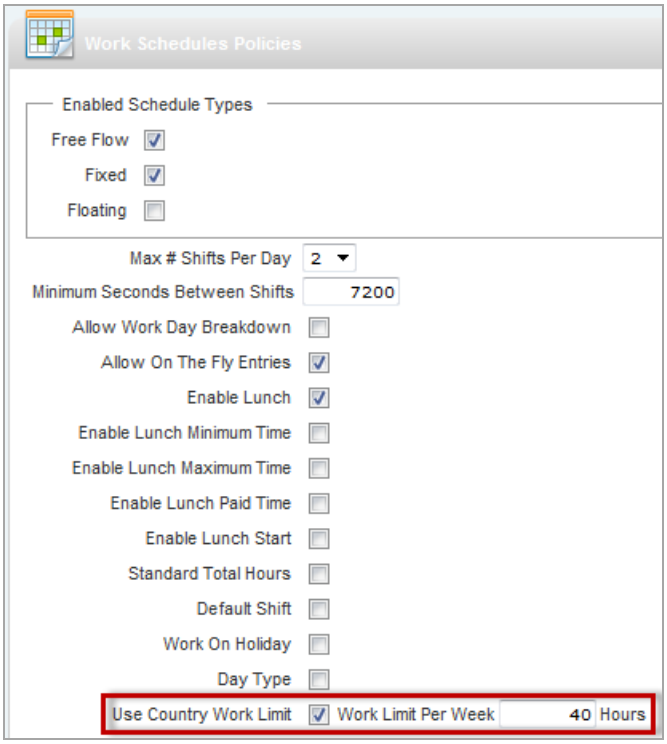
Managers will have the ability to create a Company Opt-Out Agreement under **Company Settings > Time & Labor Setup > Company Opt-Out Agreement**.

Once created, the Manager can view and/or download Employee Opt-Out Agreements under **My Employees > Employee Maintenance > Employee Opt-Out Agreements**.

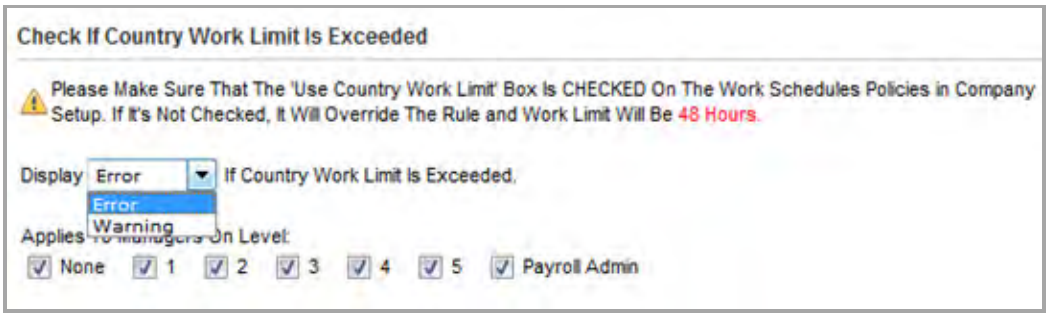


Additionally, an “Expired Opt-Out” Notification can be configured under **Company Settings > Global Setup > Notifications** to alert users of an impending expiration of the Opt-Out Agreement.

In conjunction with the Opt-Out Agreement, there is now an option within the Work Schedule Policies under **Company Settings > Global Setup > Company Setup > Global Policies Tab** to set a Country Work Limit, which will allow a company to set a per-week work limit (i.e. 40 hours).



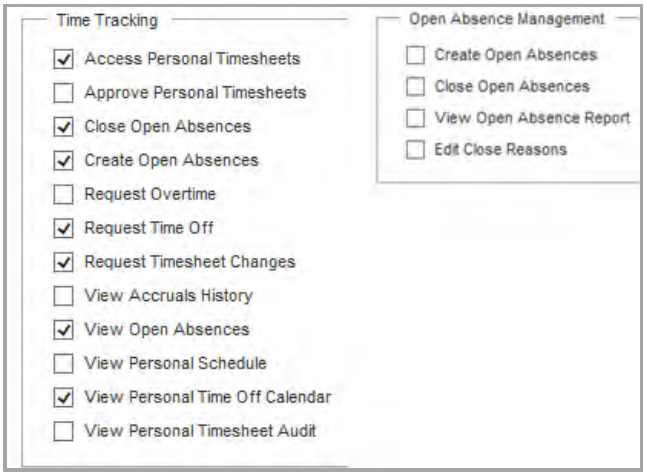
A Timesheet Profile Rule, "Check If country Work Limit Is Exceeded" can then be used to generate a warning or error when an employee exceeds the set Country Work Limit, under **Company Settings > Profiles/Policies > Timesheets**.



Open Absence Management

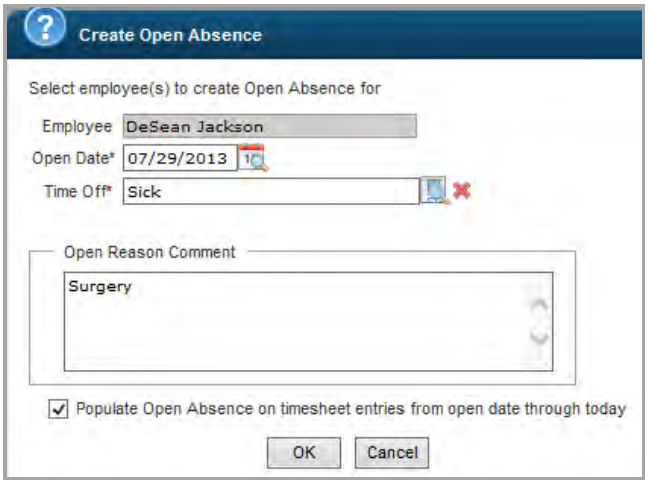
Companies with EU Markets Functionality enabled have the ability to utilize the Open Absence feature, which allows for an employee to request or manager to create an extended period of time off that will be populated on the employee's timesheet.

Within **Company Settings > Profiles/Policies > Security > ESS Tab**, under the Time Tracking section, employees can be granted the ability to Create Open Absences and/or Close Open Absences. Additionally, under the T&A Tab, there is an Open Absence Management section to determine what Managers and Administrators should have access to.

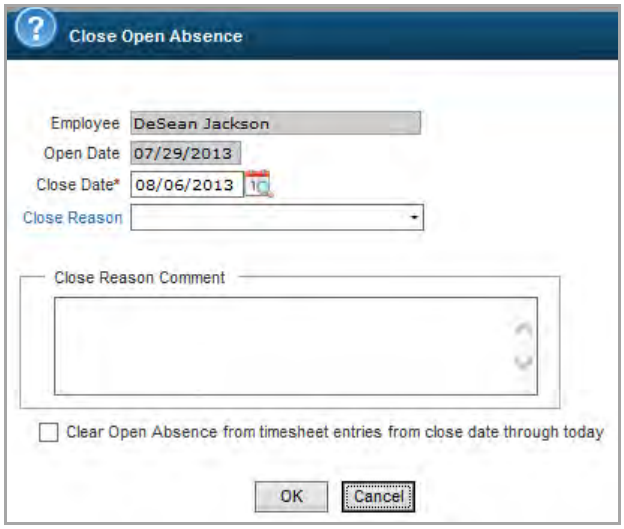


Employees can then navigate to **My Account > My Open Absences** to create and/or close an Open Absence.

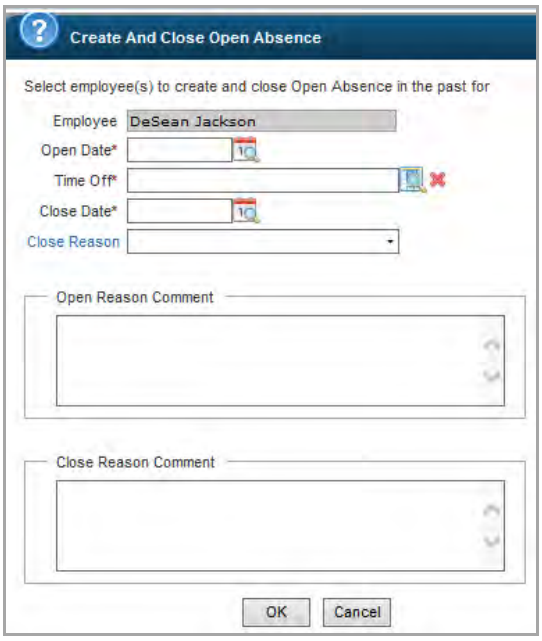
When creating an Open Absence, the user will be prompted to enter the Open Date, type of Time Off, and add any comments. They also have the ability to set the Timesheet to populate with the Open Absence Time Off.



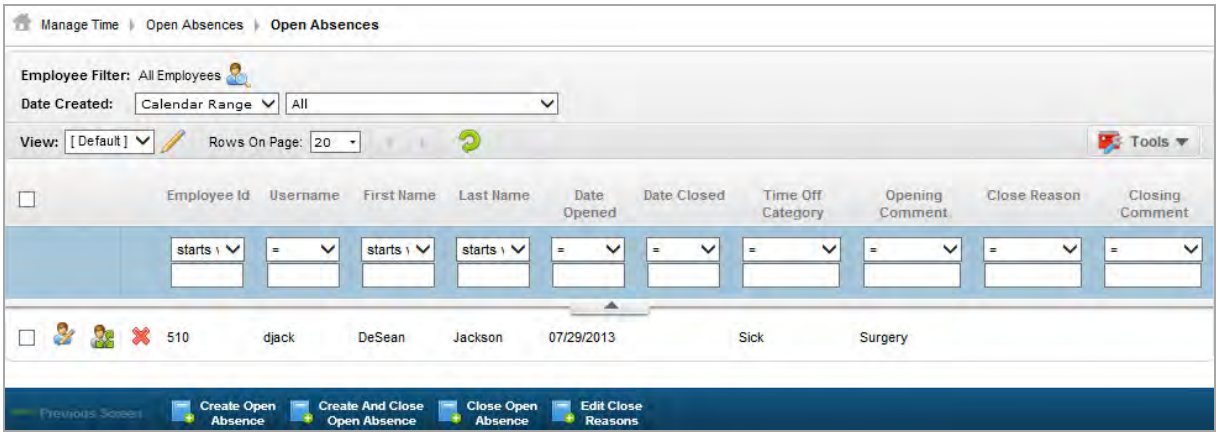
The employee can also Close an Open Absence. Reason Codes can be created and attached to the closing of Open Absences, seen with the “Close Reason” field.



Additionally, the employee can Create and Close an Absence (meaning there is known start and end date), which combines the two Create and Close prompts into one.



Managers will then have the ability to view, create, close, and create and close Open Absences under **Manage Time > Open Absences**.



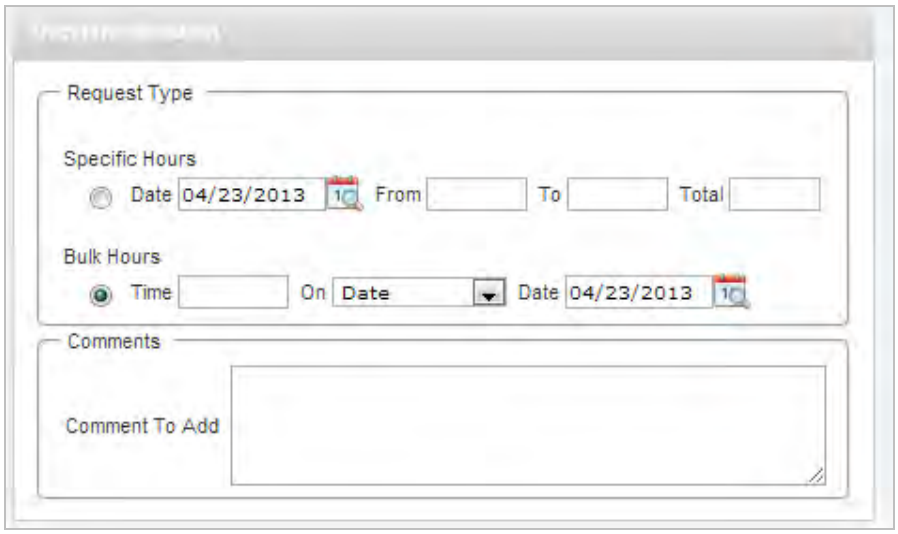
Standard Work Week

Within **Company Settings > Global Setup > Company Setup**, the Company Configuration section has the option to enter the Standard Work Week, in addition to the Company's Standard Work Day.

Requesting Overtime

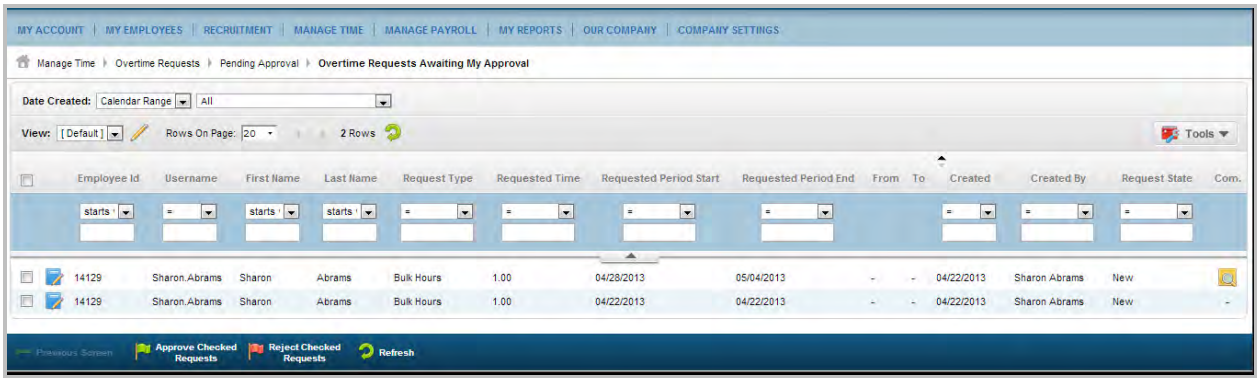
Functionality is available for users to make requests for working Overtime, which will need to be enabled within the ESS Tab of the Employee's Security Profile. Managers will also need to have access to view, approve, and/or reject those requests within the T&A Tab of the Security Profile (**Company Settings > Profiles/Policies > Security**), as well as permission within Groups (**Company Settings > Global Setup > Groups**).

Employees will then be able to make Overtime Requests under **My Account > My Overtime Requests > Request**. Similar to a Time Off Request, they will have the option of a Specific Hours or Bulk Hours (specific day, week, pay period, or 31-day date range) request, and will need to fill out the applicable fields, and submit. Once submitted the Employee can view their requests under **My Account My Overtime Requests > Awaiting Acceptance**, as well as **My Account > My Overtime Requests > All**.



Managers can also make Overtime Requests on an Employee's behalf under **Manage Time > Overtime Requests > Request**.

To Approve or Reject a Request, the Manager would go to **Manage Time > Overtime Requests > Pending Approval**, and treat it the same as a Time Off Request.



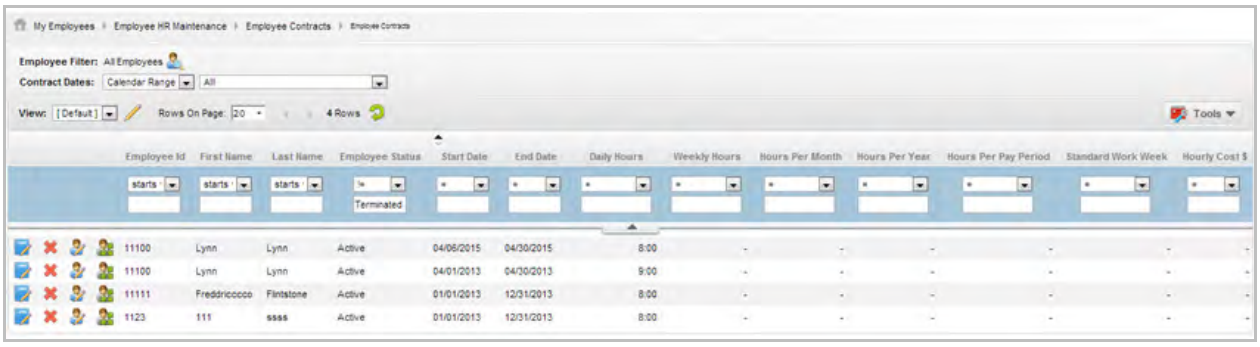
Notifications can also be configured under **Company Settings > Global Setup > Notifications** to trigger based on an Approved, Created, Modified, or Rejected Overtime Request.

The following reports are available:
- Average Weely Hours By Pay Period Report will be available under **My Reports > Time & Labor > Calculated Time > Average Weekly Hours by Pay Period**. This report will allow for analyzing the average weekly hours within a defined date range.
- Employee Overtime Overview will be available under **My Reports > Time & Labor > Overtime > Employee Overtime Overview**. This report will display Overtime hours (requested and not) in addition to other worked hours.
- Employee Overtime Request Report will be available under **My Reports > Time & Labor > Overtime > Employee Overtime Request Summary**. This report will display all employee's Overtime requests for the selected date range.

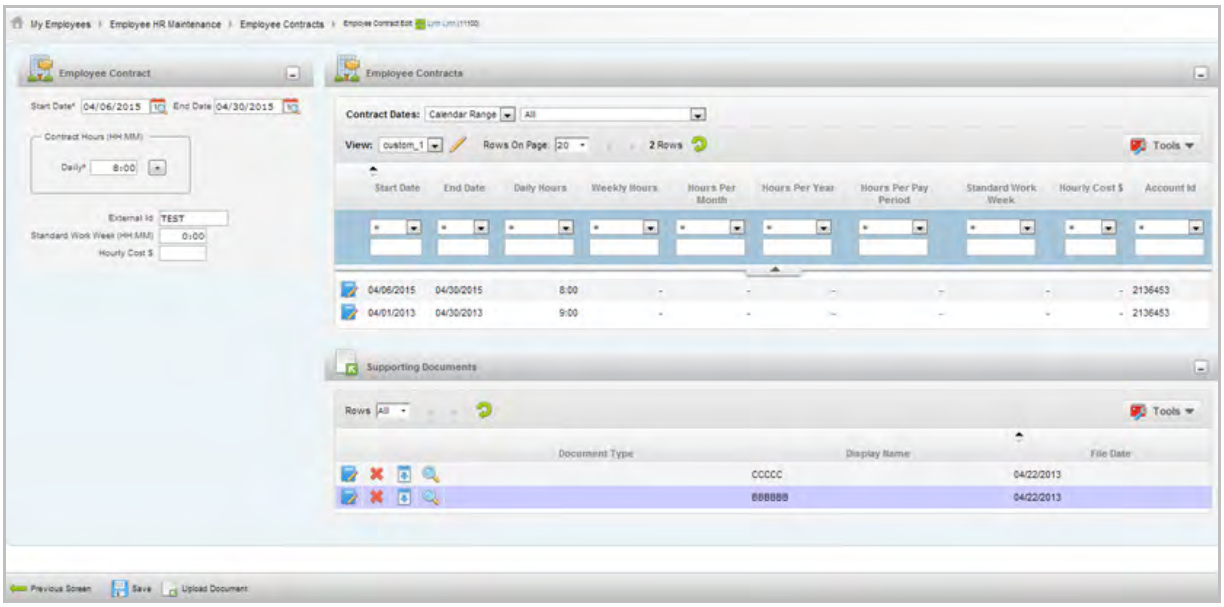
Employee Contracts

If the EU Markets Functionality is enabled, within a Security Profile under **Company Settings > Profiles/Policies > Security**, within the T&A Tab, there is a checkbox for Employee Contracts. Additionally, this field can be made required for all newly added employees within **Company Settings > Global Setup > Company Setup > Global Policies Tab**.

Once enabled, under **My Employees > Employee HR Maintenance > Employee Contracts**, you will be able to view and add all active Employee Contracts for the selected date range.

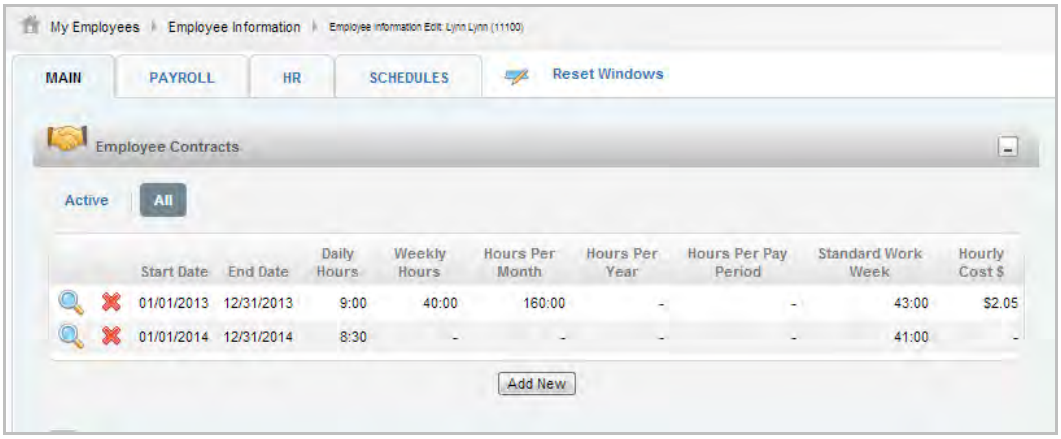


By clicking on the blue pad and pencil to edit an existing contract or the "Add New" button to create a new contract for an employee, you will then be able to enter the Start Date, Daily amount of hours, Standard Work Week Hours, Hourly Cost, and any Supporting Documents.



The changes made to an Employee's contract are tracked, and can be viewed under **My Reports > System > Audit Trail > TA > Employee Contracts**.

The Employee Contracts can also be viewed within an Employee's Information Profile, **My Employees > Employee Information** and selecting the "Active" or "All" hyperlinks.



An Import Template is available so Employee Contracts can be imported into the system.

Additionally, Employee Contracts can be exported using the Employee Contracts Data Export under **Company Settings > System Data Export > Data Exports**.

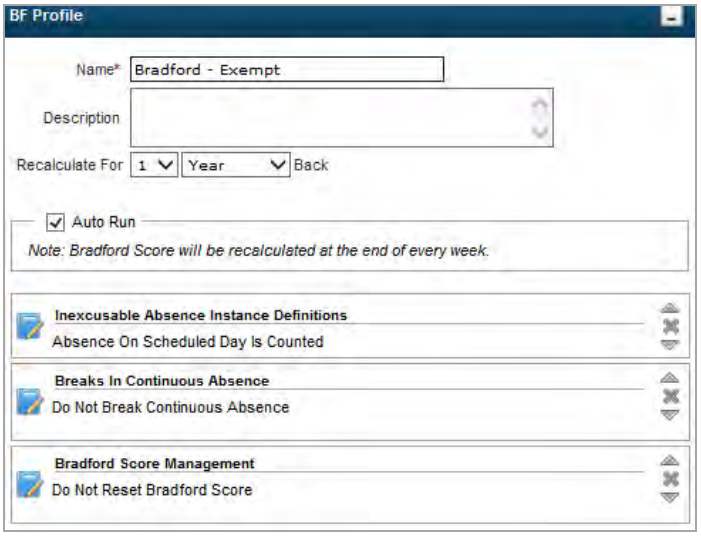
Bradford Factor

If the EU Markets Functionality is enabled, you can also enable Bradford Factor, which measures and tracks employee attendance.

The factor gives a rating to each employee over time based on the number and length of their absences. Employees with many short leaves are penalized more than those with a small number of long-term absences. The rating is calculated as S * S * D = Rating. The S = number of absences recording during 52 weeks, and D = number of days absent. For example: An employee is absent 12 out of 13 days, so their absences would calculate as 12 * 12 * 12 = 1872. Another example: An employee has two 5 day and 6 day absences, which would calculate 2 * 2 * 11 = 44. The employee with two long-term absences receives a lower score (44).

To enable Bradford Factor:

2. Within the Company Information (**Maintenance > Companies > All System Companies**) screen under "Available Functionality" the checkbox for Bradford Factor will first need to be enabled.
3. Once enabled, a Bradford Factor Profile can be configured by going to **Company Settings > Profiles/Policies > Bradford Factor**. The Profile can then be assigned to the corresponding employees.



4. The Profile will have three rules by default that cannot be removed; Inexcusable Absence Instance Definitions, Breaks In Continuous Absence, and Bradford Score Management. Partial Absence can also be added as a rule, but is not in the Profile by default. Settings within each rule can be configured as needed.
   Inexcusable Absence Instance Definitions: determines if absences on any day, and/or absences on scheduled days count. Can also create a list of unexcused Time Offs.
   Breaks In Continuous Absence: determines what is considered a break (if anything); company Holiday and/or unscheduled days.
   Bradford Score Management: determines when scores should be reset, and if they should be calculated on a rolling basis.
5. A Notification for Bradford Factor Is Reached Limit can be configured to send based on the Bradford Score Management Profile Rule under **Company Settings > Global Setup > Notifications**.
6. A Bradford Factor Summary Report is available under **Manage Time > Bradford Factor > BF Summary**. This report will display 1 year of BF data from the date in which the report is generated by default, but can be adjusted as needed.

FAQ's

This chapter provides answers to questions frequently asked by Web Based Time & Labor Management system administrators.

I added a user account but when I go to My Employees > View/Edit I don't see the account. Why?
While your security level controls the system functions you have access to, Groups control the users you have access to. Go to **Company Settings > Global Setup > Groups > View/Edit** and click the button next to the Group that contains the user you want to access. Make sure you have permissions to access this Group.

This guide mentions Payroll Rule Profiles and Benefit Accrual Profiles but I don't have those options in my Web Based Time & Labor Management system. Why?
The Benefit Accrual and Payroll Rule modules are optional. If your company is not using Web Based Time & Labor Management to track benefit time or process timesheet data for payroll, these modules will not appear under the **Profiles** menu. If you are interested in adding these modules to your Web Based Time & Labor Management account, contact your Web Based Time & Labor Management representative.

How do I change a user's password?
Go to **My Employees > Employee Maintenance > Change Password. Employee Information**. Enter a new password for the user in the **New Password** field and click **Save**.

Can I force a user to change his/her password on their next login to Web Based Time & Labor Management?
Yes. Go to **My Employees > Employee Information**. Click the button next to the user you want to work with. Select the **User must change password at next logon** checkbox and click **Save**.

Can I prevent a Web Based Time & Labor Management user from logging in and using the system?
Yes. Go to **My Employees > Employee Information**. Click the button next to the user you want to work with. Select the **Locked** checkbox and click **Save**.

Can I specify the first screen that is displayed when a user logs in?
Yes. Go to **My Employees > Employee Information**. Click the button next to the user you want to work with. Select the screen you want displayed in the **First Screen** field and click **Save**.

Can I specify a default Cost Center for a user?
Yes. Go to **My Employees > Employee Information**. Click the button next to the user you want to work with. Select the user's default Cost Center from the **Default Cost Center** field and click **Save**.

Can I format the Web Based Time & Labor Management interface?
Yes. Web Based Time & Labor Management lets you control the look and format of the following components: date formats, the logo area and background screens of the application, and the login screen background.

How do I control the system functions a user can access?
Security Level Profiles determine the system functions a user can access.

To apply a Security Level Profile to a user account, simply go to **My Employees > Employee Information**. Click the button next to the user you want to work with. Select the user's security level in the **Security Profile** field and click **Save**.

How do I specify the type of timesheet a user will use?

Go to **My Employees > Employee Information**. Click the button next to the user you want to work with. Select the user's timesheet type in the **Timesheet Profile** field and click **Save**.

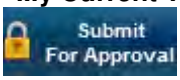
How do I pre-populate a user's timesheet with their work schedule?

Go to **My Employees > Employee Information**. Click the button next to the user you want to work with. Select the user's schedule in the **Work Schedule** field. Select the **Pre Populate TS from Schedule** checkbox and click **Save**.

Can I find out from which IP address users are logging in to Web Based Time & Labor Management?
Yes. Use the **Global Access** report to view this information. Go to **My Reports > System > System Utilities > Global Access**. Select the date range you want to report on and include all **Available Columns** in the report output, and then click **Run Report**. The report output will display all log-ins for the date range you selected. The **IP** column displays the IP address that was used for the login.

Can I find out when a user's timesheet was edited?
Yes. Use the **Timesheet Audit Trail** report to view this information. Go to **My Reports > System > Audit Trail > TA > Timesheets**. Select the date range you want to report on and include all **Available Columns** in the report output, and then click **Run Report**. The report output will display all timesheets that have been edited. Click the button to view how each timesheet was edited in detail.

Can I have company holidays automatically populate a user's timesheet?
Yes. This is controlled by the Holiday Table Profile assigned to the user's account. You must specify the hours to be used for each holiday in the Holiday Table Profile, and Web Based Time & Labor Management will populate the timesheets of the users assigned to this Holiday Table Profile.

How do users work with their timesheets and submit timesheets and time off requests?
Users can edit their current timesheet by selecting **My Account > My Current Timesheet**. When they are finished filling out their timesheet they can submit it by simply clicking the 

button. Users can submit requests for time off by selecting **My Account > My Time Off > Request**. They can fill out the time off request information and click the **Submit Request** button. For more information, see the *Web Based Time & Labor Management User Guide for Employees*.

How do managers approve/reject timesheets and time off requests?
Managers can approve/reject timesheets by selecting **Manage Time > Manage Timesheets > Pending Approval**. From this screen they can view the timesheet in detail and approve or reject it. Managers can approve/reject time off requests by selecting **Manage Time > Time Off Request > Pending Approval**. From this screen they can view the time off request in detail and approve or reject it. For more information, see the *Web Based Time & Labor Management User Guide for Managers*.

What is the best report to use to view the employee's rate multiplied by the hours worked?
Go to **My Reports > Time & Labor > Calculated Time > Calculated Time Summary**. Within this report, you can pull in columns to view base rate, hourly rate, and total amount. You can also view piece rates and amounts.

When there is a Daylight Savings Time (DST) change, what happens to the time entered by employees crossing midnight? Will they get paid overtime or lose an hour?

Here is a general overview of how time is collected, and what you can expect based on the different types of punches that may occur:

- All time is saved in Universal time format.
- UTC (Coordinated Universal Time) = GMT (Greenwich Mean Time)
- Local time zones are recorded separately, for example:

Nov 1st 11pm EDT = Nov 2nd 3am GMT
Nov 2nd 11am EST = Nov 2nd 4pm GMT
= 13 hrs total
March 3rd 11pm EST = March 4th 4am GMT
March 4th 11am EDT = March 4th 3pm GMT
= 11 hrs total

Method to Collecting Punches

1) Hardware (clock specific)
   - Time on Clock comes from computer where middleware is installed
   - Some do not record TZ (time zone)
     - Verifone - time is recorded in universal time so proper time is set by default whether its standard or daylight time

2) Timestamp – system calculates automatically

3) Start/Stop – On day before Daylight Savings Time, if you enter 1:30am, you will need to be specific:

1am 1:15 **1:30** 1:59 1:00 1:15 **1:30** 1:45 2:00
EDT **EST**

Nov 1st 11pm ➔ 11pm -4 offset
Nov 2nd 3 out punches
Local = 2am Verifone=3am -4 offset
Sy??? Local = 4am ➔ 4am -5 offset

4) When DST happens
   - If you are running Windows 2000 which was installed more than 2 years ago, it may not have latest updates
   - You can download a patch from **http://support.microsoft.com/gp/cp_dst**
     - You cannot change the clock within the system to mimic because Windows saves in GMT (Greenwich Mean Time) as well.