Employee Tracker Time & Attendance System
Time Approval & Edit T&A

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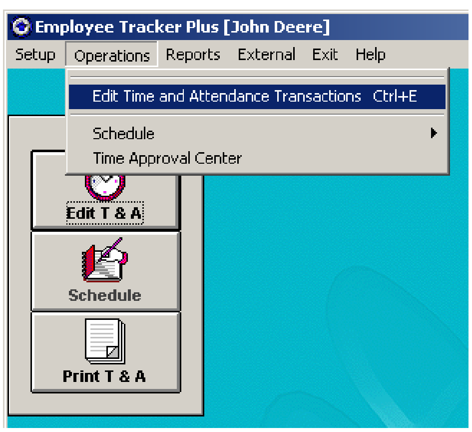
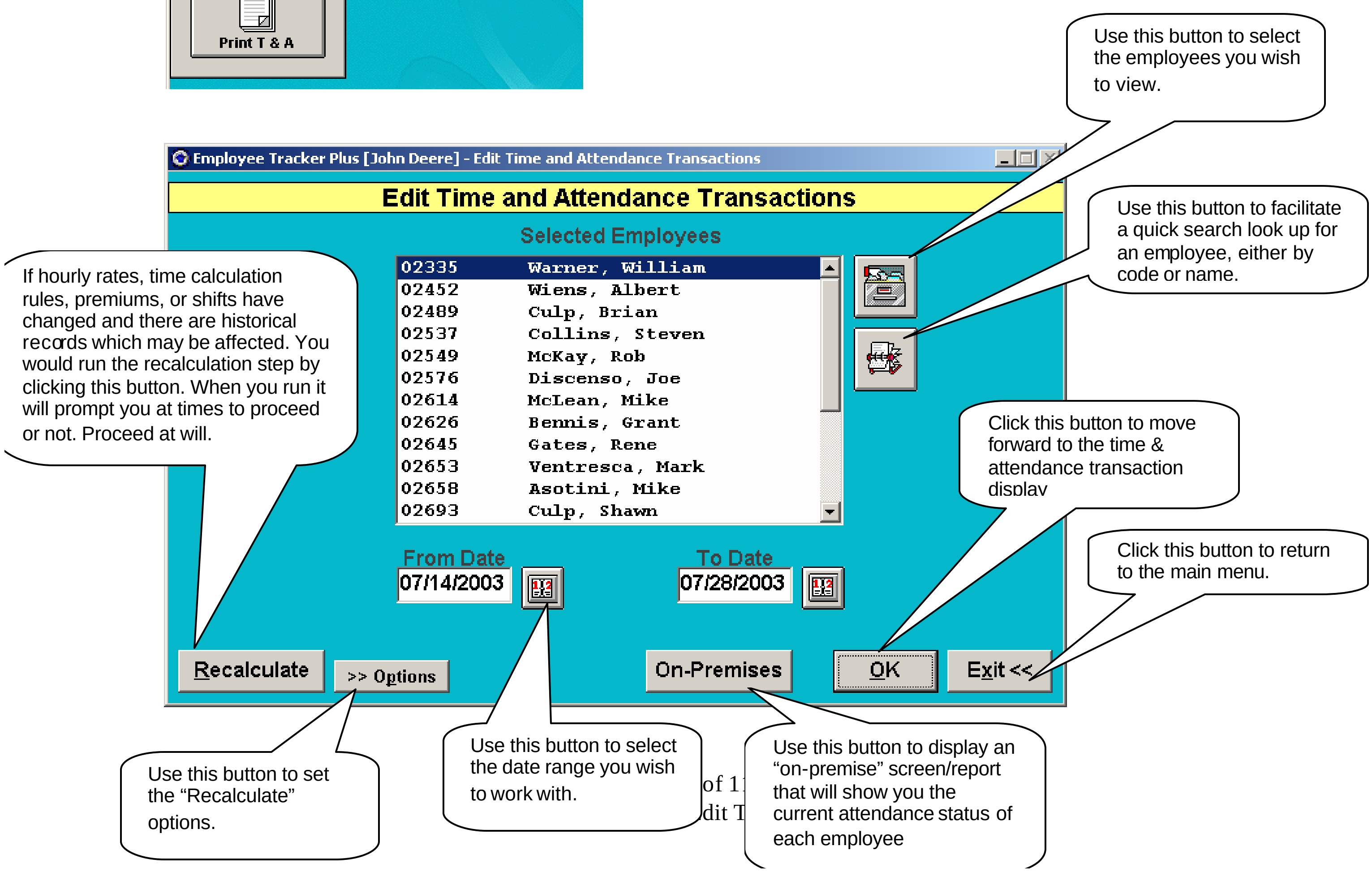
Approve Time Transactions

Employees will clock in and out each day. During the day they may transfer between departments, positions etc. Each day you should review, verify and approve time transactions. There are two ways of doing this. One is the “Edit T&A” function, and the other is the “Time Approval Center”

Edit T&A

The Edit T&A function enables you view and maintain time & attendance transactions for employees using a time card view. You can display multiple days and multiple record types (time records, premium records, absent records, stat holiday records). This screen displays all records rather than records by exception. For exception processing, use the Time Approval Center function (described below).



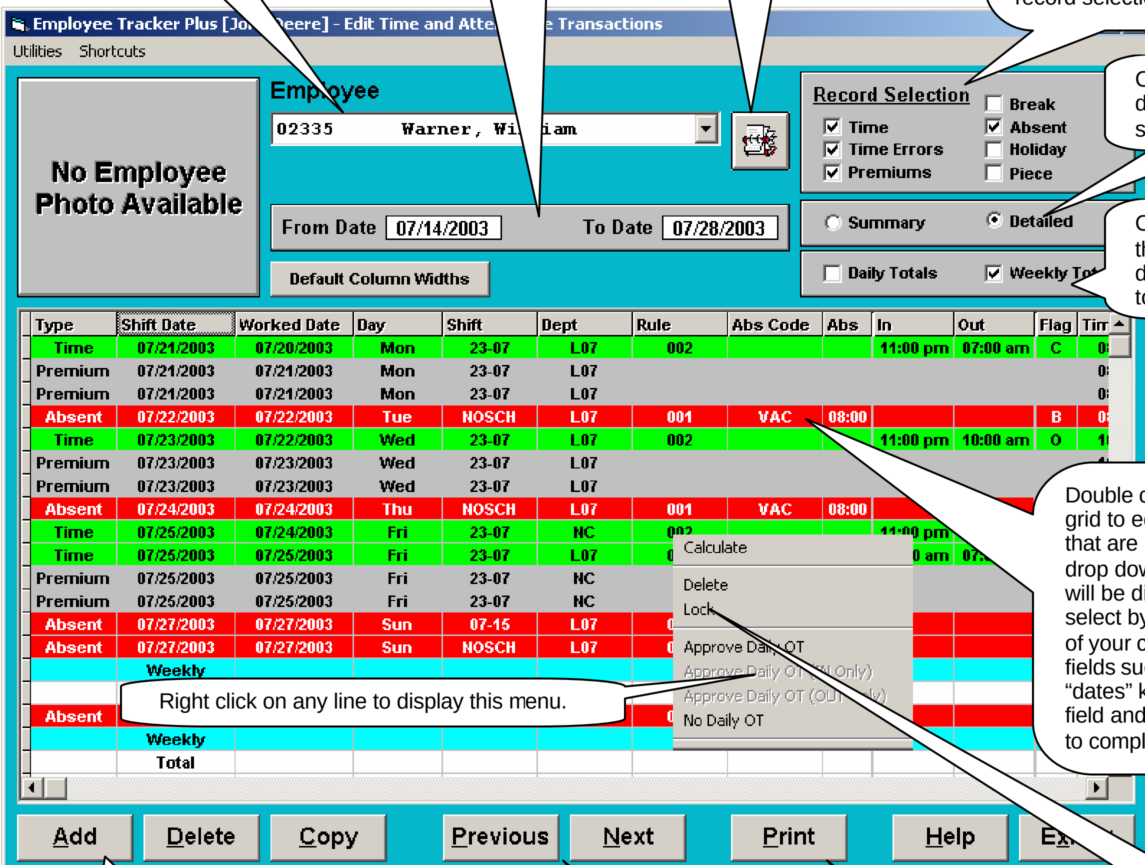


Click here to display a list of employees work with

Double click on each date if you wish to change the date range you are working with.

Click here to use the "Quick Search" feature.

Select the record types you wish to view. This will cause the grid display to change as you add or remove record types as only relevant columns are displayed as per the record selection.



Click here to set the display to detailed Vs summary.

Click here to enable the screen to display daily and/or weekly totals.

Double click on any field in the grid to edit its value. For fields that are related to tables, a drop down list of valid entries will be displayed and you will select by clicking on the entry of your choice. For free entry fields such as "notes", "time", "dates" key the value into the field and press the [Enter] key to complete the edit.

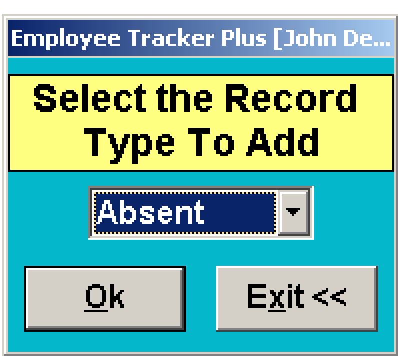
Right click on any line to display this menu.

Click "Lock" to electronically approve the transaction.

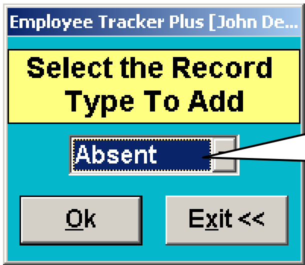
Click to add a new transaction. When you do this the small form below this description will be displayed. You must select the transaction type prior to adding a transaction. The transaction types available to add will be restricted to the record types that have been turned on in the "Record Selection" panel in the top right corner of the T&A edit form

Move to the previous or next employee

Print a hard copy of the time & attendance transactions for the displayed employee.



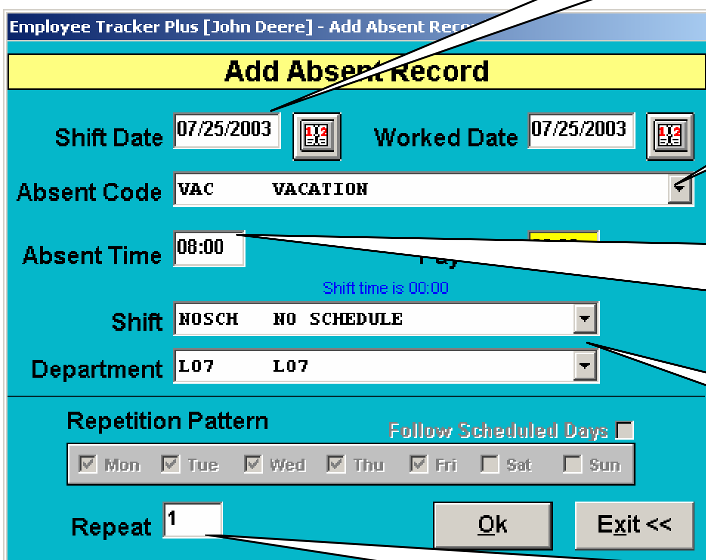
Adding Transactions – Absent records



Select "Absent" If you do not see the "Absent" option check the "Record Selection" panel in the top right hand corner of the system

Select date. Make sure that the "Shift Date" and "Worked Date" are the same.

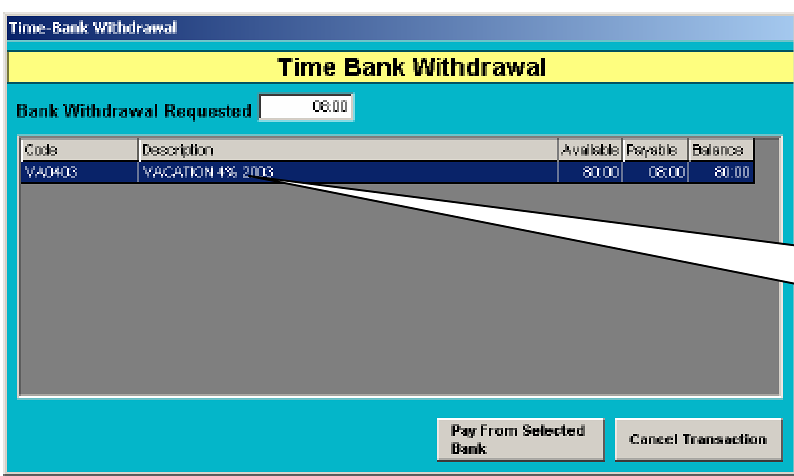
Select the absent code.



Double click the "Absent Time" field to default to 8:00 hours. Double click the "Pay Time" field to copy the value from the "Absent Time" field. **Note not all absent codes can be paid. When this is the case, you will not be able to enter any time into the "Pay Time" field.((

Select the shift and department codes. Usually this is set to the scheduled or default values and you don't need to touch it.

If you wish to create multiple days of absenteeism (vacation for example). Enter a value greater than 1. The repetition pattern will be enabled and simply check the days you wish to create absenteeism records for or check the "Follow Scheduled Days" box to create absent records based on the employees schedule.

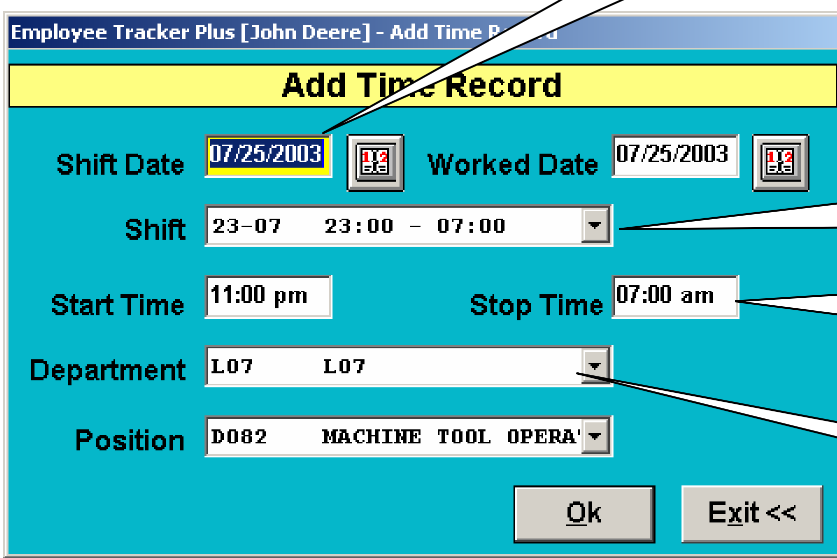


If you are paying for absenteeism that is attached to a "Time Bank" You will be prompted to review the current balance of the time bank and you will select the bank you wish to draw from and click [Pay From Selected Bank].

Adding Transactions – Time records

Select "Time" If you do not see the "Time" option check the "Record Selection" panel in the top right hand corner of the system

Select date. Make sure that the "Shift Date" and "Worked Date" are the same if the work shift does not cross midnight. If the work shift crosses midnight and is set to pay based on the date after midnight. Set the "Shift Date" to match the scan in day, and the "Shift Date" to reflect the paid day.



Select the shift code. Usually this is set to the scheduled or default value and you don't need to touch it.

Enter the start and stop times. The system will create this from the employee scheduled shift or the default employee shift if no schedule exists.

Select the department and position codes. Usually this is set to the scheduled or default values and you don't need to touch it.

Approve Time Transactions

Employees will clock in and out each day. Each day you should review, verify and approve time transactions using the Time Approval Center.

The Time Approval Centre allows you to manage your employee swipe times on an exception basis. The Time Approval Centre segregates your employees into the following categories:

1. Standard Hours.(worked expected hours based on the schedule)
2. Missing Swipe (either a swipe is missing or swipes cannot be linked for some reason)
3. Variance (swipe times do not match with scheduled times)
4. Overtime eligible.(may have worked overtime, you will have to review and adjust)
5. Overtime (worked overtime)
6. Worked and Absent. (worked part of the day, and absent part of the day)
7. Absent without reason (scheduled but no swipe)
8. Absent (scheduled but with an absent code attached)
9. Absent Approved (absent code attached and record approved).
10. No Record (employees with no swipes or schedules)
11. Approved (employees who's schedule and swipes match up)
12. Still Working. (you are looking at the current days records)
13. Expected Later Today.(you are looking at the current days records)

Time Approval Center only lets you see one day at a time. This allows you to easily manage your employee records each day in a few minutes as you correct the exceptions the records move to the approved portion of the timesheet. It is recommended that you first look after your absent records and then review your missing swipes and variance records.

Accessing Time Approval Centre

Time Approval Center is located under operations. Simply click on Time Approval Centre and it will automatically load yesterday's records.

Standard hours

These records may not require any action other than to approve them. You can "right click" on the "Standard Hours" heading and approve all the records at once or you can review and approve one record at a time. When you approve the records they will move from the "Standard Hours" category to the "Approved" category.

Missing Swipes

1. Click on the + to the left of missing swipes.
2. Click on the + to the left of the employee.
3. Review the missing swipe identified with the **:**** or click on the + beside error and let the software identify the problem.
4. Right click on the error line and select whether you wish to add an in punch or an out punch.
   You will be given an option to key in the value or use the employee's default shift value.
5. Once you fill in the blank by either method the record will move to approved.

Handling Double Swipes (these should not exist)

When you have double swipes follow steps 1-5 under missing swipes and then once you have 1 correct line highlight the other line or lines and right click and select delete record and once record is deleted the record will move to approved.

Handling Variance Records

Variance Records are discrepancies between scheduled time and swiped time. The reason records may be in this category are: Employee was not scheduled to work, but clocked in/out, Employee was scheduled to work the day shifts but has clocked in on the afternoon shift, Employee worked less hours than expected.

Approving a Variance

1. Open the variance record to its full capacity by clicking on the +signs to the left.
2. If you need to change a shift, or rule display the appropriate selection list and make your change.
3. To approve, highlight the employee record and right click on their name.
4. Select approve. The record will move to the approve section.

Notes: Sometimes if you have overtime approval required turned on and you correct either variance records or missing swipe records you record will move to overtime so that you can approve the overtime. Simply open overtime by clicking on the + and right click and you should get choices whether to approve all or some of the overtime.

Handling Variance Records

Variance Records are discrepancies between scheduled time and swiped time. The reason records may be in this category are: Employee was not scheduled to work, but clocked in/out, Employee was scheduled to work the day shifts but has clocked in on the afternoon shift, Employee worked less hours than expected.

Handling Absent Records

If you have any employees showing up under "Absent Without Reason" you will need to enter the reason for each record

1. Click on the + sign to the left of their name to see their schedule.
2. If the schedule is correct and the employee just did not miss swiping in and out then right click on their name and select "Add an Absent Record". Otherwise make a notation to correct their schedule or add the correct time by selecting "Add Time"
3. When selecting Add an Absent Record you will select a code from the drop down.
4. You usually leave the department and shift to default to the employee's home shift.
5. You will key in the absent time(this does not pay only tracks time).
6. You will key in the paid time if applicable. Note that no lunch is deducted from this time so it should be actual paid time.
7. You will click on OK.
8. if the paid absence is linked to a time bank (vacation, floater) a time bank selection screen will be displayed showing you the employees time bank balance.

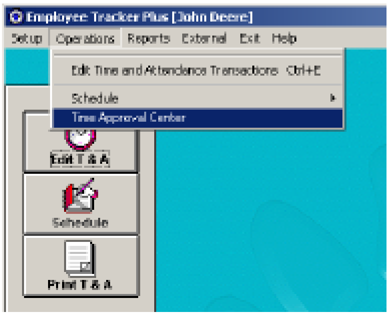
The record then moves from Absent without reason to Absent.

Approving Absent Records

Once all the absences are explained you then you can approve them for payment. This is a 2 part process because it maybe the person assigning the absent code does not have the right to approve it for payment.

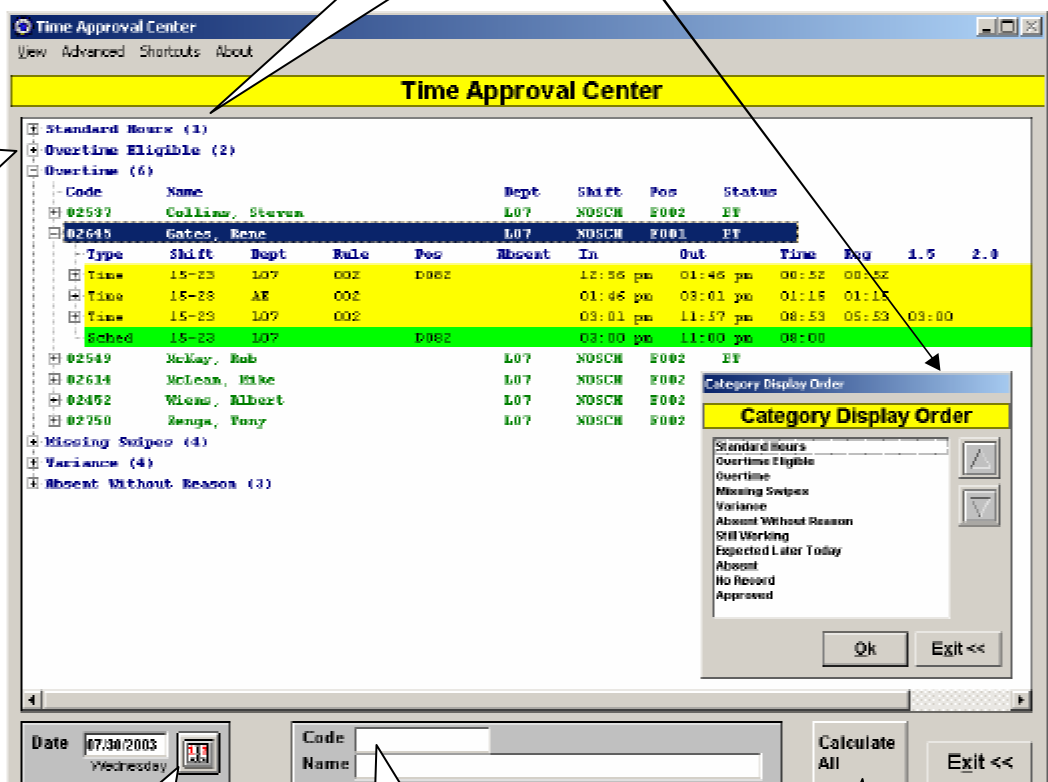
1. Click on the + to the left of absent.
2. Right click on the employee's name.
3. Select Approve Absent.
4. The record moves from Absent to Approved Absent.

Time Approval Center



This screen will display categories of transactions for all of your employees for a specific day. The possible categories are listed here.

Click the [+] to open a category and keep doing it to drill down further.
Click [-] to close



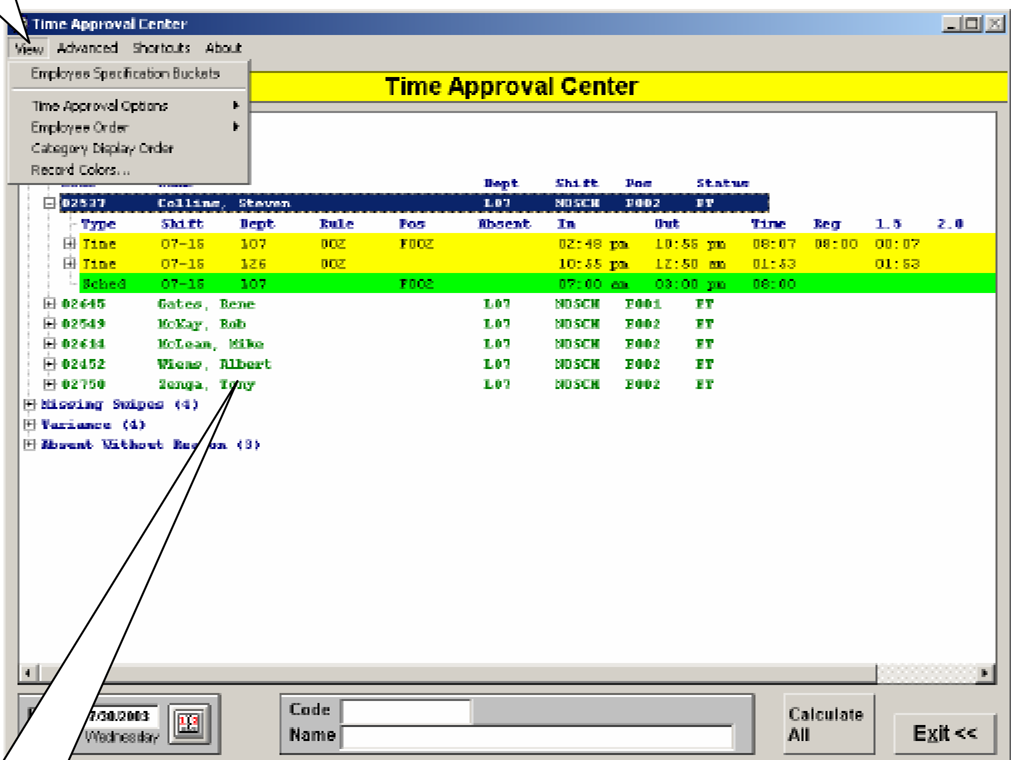
Click here to select the date you wish to work with.
** note **
Unlike all other date fields in Employee Tracker, you can only access this one with the calendar button.

Enter an employee code or name to facilitate a quick search.

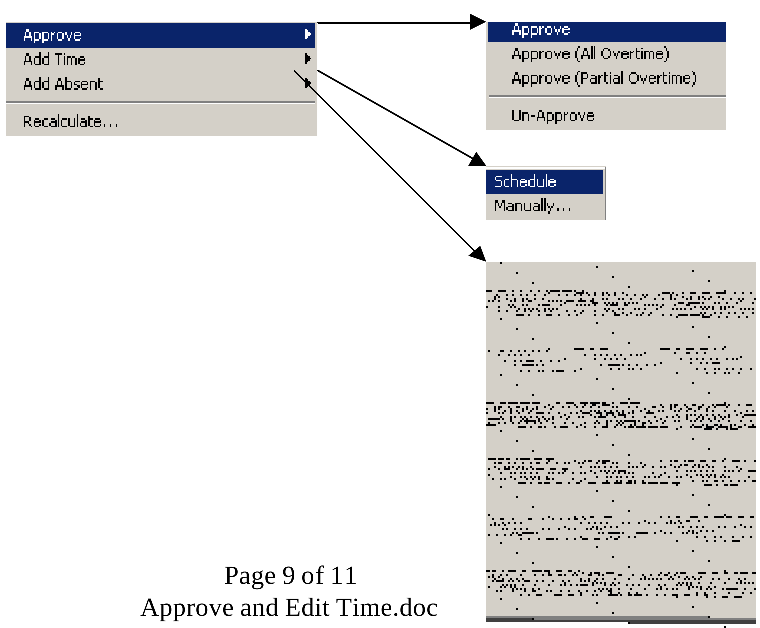
If the dynamic calculation switch is “off”, click this button after you have completed all edits.

Time Approval Center

Click here to display "Employee Specification Buckets".

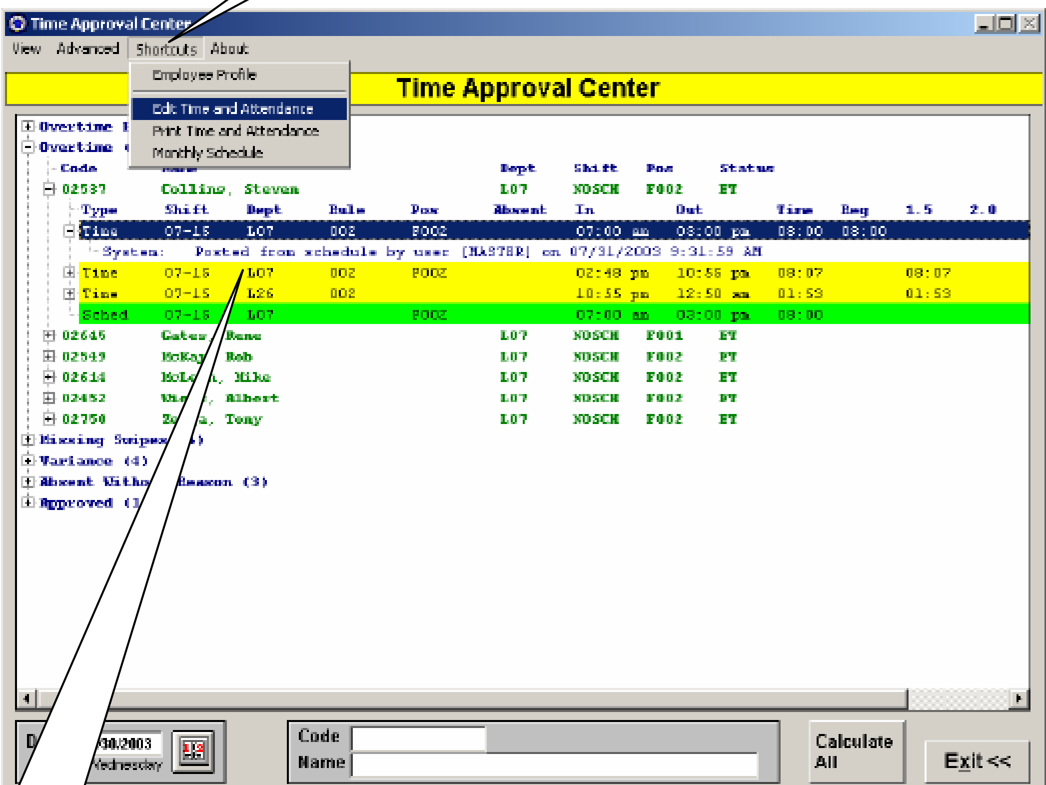


Right click on the employee name line to display the "Approve", "Add Time", Add Absent" submenus.

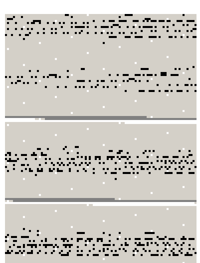


Time Approval Center

Click this to display a short cut menu. You can jump to the edit T&A screen (electronic time card), monthly schedule, daily schedule.



Right click on transaction line to display the edit sub-menu.



Printing Transactions