

Employee Tracker Time & Attendance System

Email Alerts

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Email Alerts

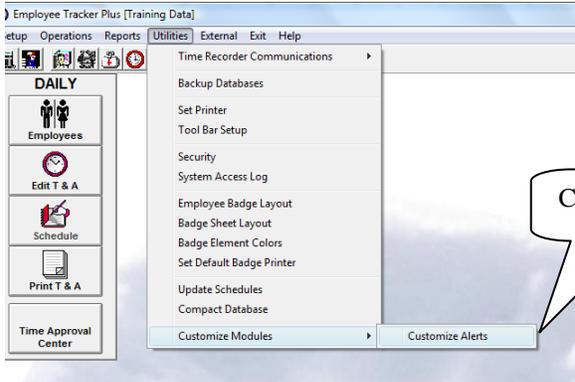
Overview

Alerts is an automated email generation tool that will send emails to pre-assigned contacts based on a variety of exceptions and triggers. The system also records all emails generated in an email alert history file. This can be reviewed by employee, alert type, and date range.

Alert types include; Absenteeism, Tardiness, Leave Early, Time accumulation, shift count accumulation, break duration, missing swipes, and scheduled VS actual variances.

There are a number of steps you must complete to configure Email Alerts and some ongoing operational steps that must be completed. These steps are defined in this document.

Activate Email Alerts



This switch allows you to create/test alerts without actually sending emails.

The system will start at this date to process any date related alerts or cumulative hours or shift alerts or transactional based alerts.
Do not select a date too far in the past if your purpose is to track events forward from the present time

Alerts Customizations

Genesis Date: 09/01/2009

Send No Emails

Outgoing Mail (SMTP): mail.advancedtracker.com

Alerts Email Address: Alerts@Advancedtracker.com
Does not have to be an actual address, but must conform to your servers address rules.

Server Requires Authentication

Username: jamies@advancedtracker.com

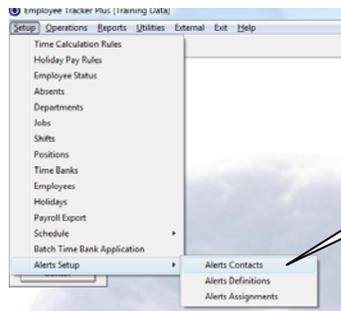
Password: *****

Server Timeout: 1000 ms.

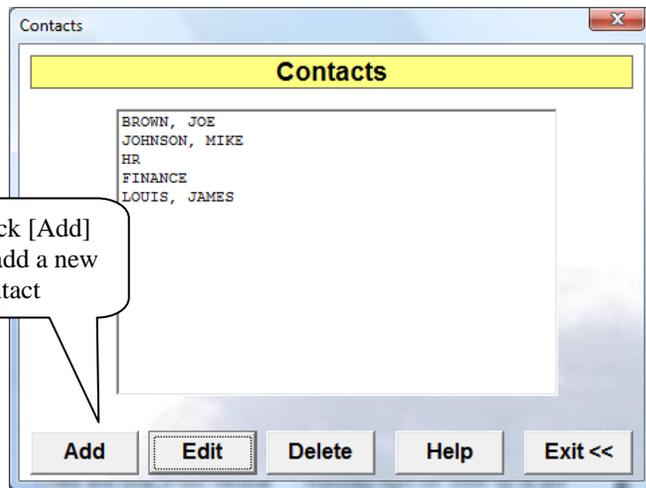
Buttons: Help, Exit <<

Check with your network or email administrator for these settings

Define Email Contacts

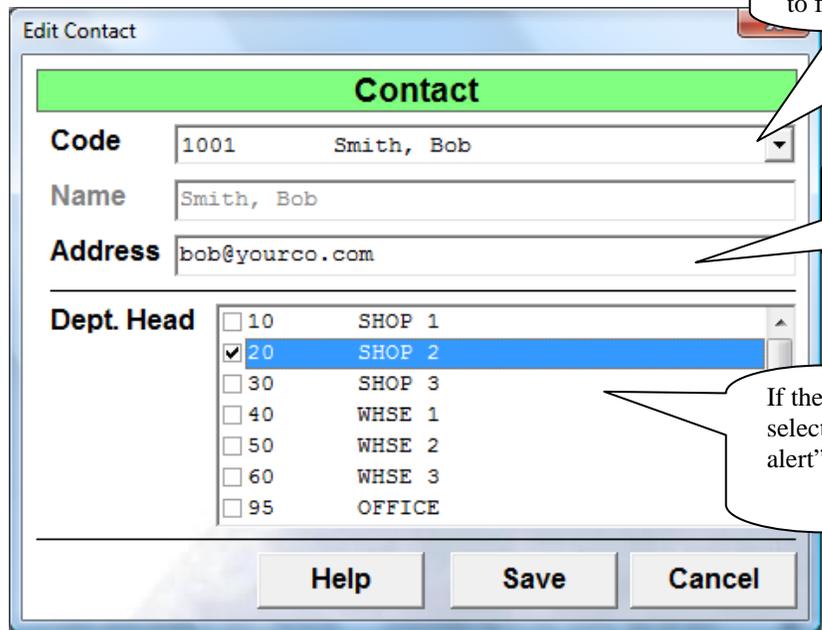


Click "Alerts Contacts"



Click [Add] to add a new contact

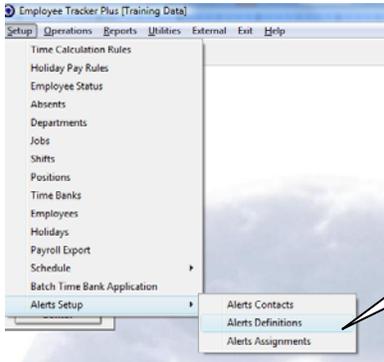
This lists employees entered in Employee Tracker. It's sole purpose is to fill in the "Name" Field



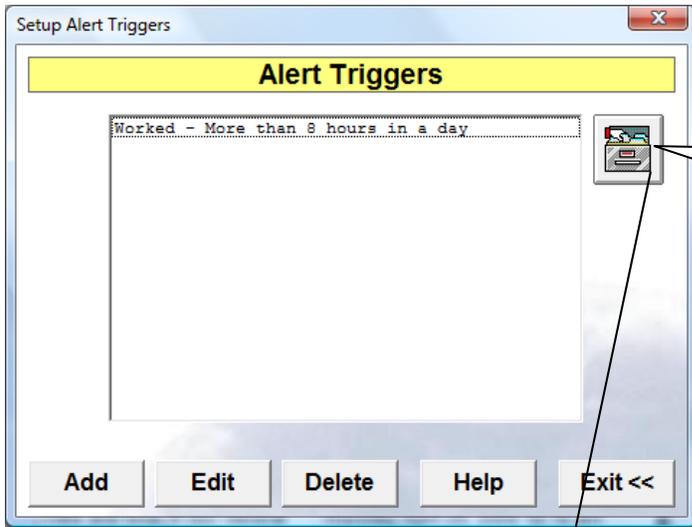
Email address of contact. Must be entered manually

If the contact is a department head they may be selected as a recipient during the "define email alert" process.

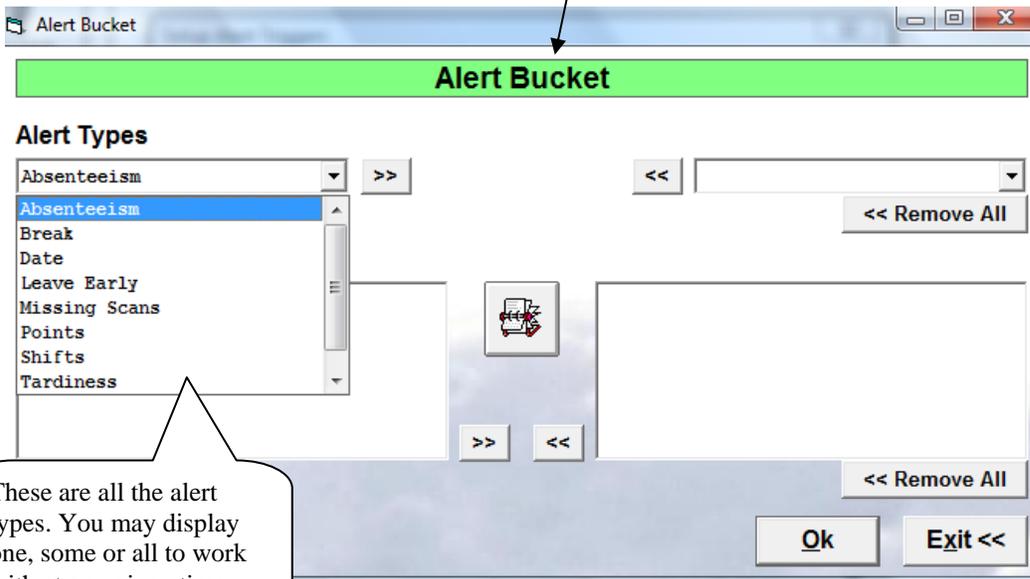
Alerts Definitions



Click "Alerts Definitions"



The "Bucket" button displays the form below.



These are all the alert types. You may display one, some or all to work with at any given time

Alerts Definitions - continued

Setup Alerts

Edit Alert

Subject:

Body:

Send To:

Font: Background:

Criteria:
 Absenteeism
 Absenteeism
 Time
 Tardiness
 Leave Early
 Points
 Date
 Break
 Shifts

Status: Active Inactive Bundled Emails

Detailed email

Select the type of Alert you wish to create.

Setup Alerts

Edit Alert

Subject: Worked more than 40 hrs in a week

Body: Worked more than 40:00 hours in a week

Send To: FINANCE
HR
LOUIS, JAMES

Font: Background:

Criteria: Time

IF (REG + T15 + T20 - Scheduled Hours) IS

MORE THAN 40:00 Hours.

Daily Monthly Weekly Days In A Row.

Anchor Date For Calculation

Status: Active Inactive Bundled Emails

Detailed email

Font and Background are used to highlight alerts in the alerts history screen

Alerts can be activated or inactivated by these radio buttons

If an Alert is based on transactional details, they will be included in the body of the email

This will appear in the Subject of the Email

This will appear in the Body of the Email

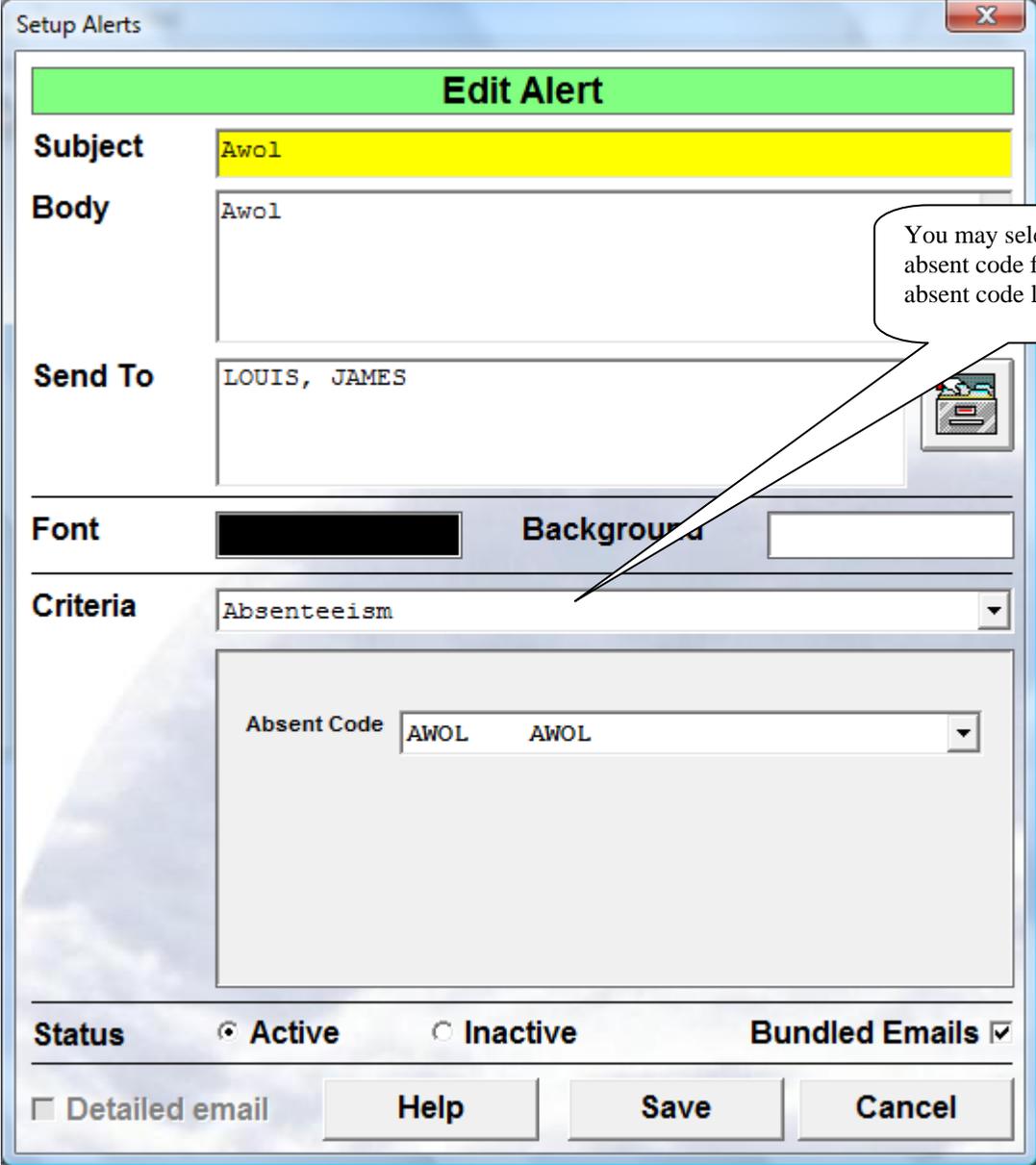
Select the contacts you wish the email to be sent to.

Alert calculations or triggers are entered in this section for all alert types

This will group many employees on one email VS on email per employee for each Alert generated

Alerts Definitions – Absenteeism

When “Process Alerts” runs it will look for the specific absent code in the alert and create an email for each occurrence. If you select bundled email, the email will provide you with a list of each employee that had the absence.



Setup Alerts [X]

Edit Alert

Subject Awol

Body Awol

Send To LOUIS, JAMES

Font [Black] **Background** [White]

Criteria Absenteeism

Absent Code AWOL AWOL

Status Active Inactive **Bundled Emails**

Detailed email **Help** **Save** **Cancel**

You may select one absent code from the absent code list.

Alerts Definitions – Time

When “Process Alerts” runs it will look for time records and scheduled records (if chosen). Hours will be accumulated and measured against your specific criteria as entered.

Setup Alerts

Edit Alert

Subject exceeding 40 hours in a week

Body exceeding 40 hours in a wwek

Send To LOUIS, JAMES

Font [Black] **Background** [White]

Criteria Time

IF (REG + T15 + T20 - Scheduled Hours) IS

MORE THAN 40:00 Hours.

Daily Monthly

Weekly Days In A Row.

Anchor Date For Calculation []

Status Active Inactive **Bundled Emails**

Detailed email **Help** **Save** **Cancel**

Select type of hours

Select measurement period

You may choose: MORE THAN BETWEEN LESS THAN

If you select “Days in a Row” you will need to select a starting date for measurement

Alerts Definitions – Leave Early

When “Process Alerts” runs it will look for “out” swipes and compare then to the scheduled stop time and calculate any “leave early” time. If the calculate leave early time falls within your measurement criteria an alert will be created.

The screenshot shows a software window titled "Setup Alerts" with a sub-header "Edit Alert". The window contains several input fields and controls:

- Subject:** Left Early
- Body:** Left Early
- Send To:** LOUIS, JAMES
- Font:** [Black box]
- Background:** [White box]
- Criteria:** Leave Early
- Employee Left Between:** 0:01 And 4:00 Early.
- Status:** Active Inactive
- Bundled Emails:**
- Detailed email:**
- Buttons:** Help, Save, Cancel

A callout bubble points to the "4:00" value in the "Employee Left Between" field, containing the text: "Hours/minutes range of leaving early".

Alerts Definitions – Tardiness

When “Process Alerts” runs it will look for “in” swipes and compare then to the scheduled start time and calculate any tardy time. If the calculated tardy time falls within your measurement criteria an alert will be created.

Setup Alerts [X]

Edit Alert

Subject Late for work

Body Late for Work between 00:01 and 4:00

Send To LOUIS, JAMES

Font [Black] **Background** [White]

Criteria Tardiness

Employee Arrived Between 0:01 And 4:00 Late.

Status Active Inactive **Bundled Emails**

Detailed email **Help** **Save** **Cancel**

Alerts Definitions – Points

Assumes that “Points” feature has been activated and set up.

When “Process Alerts” runs it will look for points in “timehistory” records and compares them to your criteria. If the cumulative points for the specified time period match your measurement criteria an alert will be created.

** Even if you don't have a points system in place, this is a way to measure cumulative tardiness or absenteeism or a period of time **

Setup Alerts [X]

Edit Alert

Subject Exceeds 3 points in a week

Body Exceeds 3 points in a week

Send To LOUIS, JAMES

Font [Black] **Background** [White]

Criteria Points

If (Shift Start + Shift End + Absent)

Lunch Start + Lunch End

MORE THAN [] Points.

Daily Monthly

Weekly 3 Days In A Row.

Anchor Date For Calculation []

Status Active Inactive **Bundled Emails**

Detailed email **Help** **Save** **Cancel**

Callouts:

- You may choose: MORE THAN BETWEEN LESS THAN
- Select type of points
- Select measurement period
- If you select “Days in a Row” you will need to select a starting date for measurement

Alerts Definitions – Dates

Looks at employee dates and generates alerts based on either “days before” or “days after” criteria.

Setup Alerts

Edit Alert

Subject Probation Date Approaching

Body Probation Date Approaching

Send To LOUIS, JAMES

Font [Black] **Background** [White]

Criteria Date

	Days	Weeks	Months	Years
Before			1	
Before	3			
Before	1			

Employee's Probation Date Ignore Year

Bundled Emails

Cancel

You may choose:
Before
After

You may choose:
 Birthday
 Review Date
 Hire Date
 Rehire Date
 Recall Date
 Layoff Date
 Termination Date
 Probation Date
 Pay Increase Date
 Seniority Date
 Holiday Eligible Date
 Position Training Date
 Position Re-Training
 Note Memo Date
 Not Action Date

For Birthday only

Alerts Definitions – Breaks

Looks at either paid or unpaid breaks and measures the break length against a pre-defined time allowance.

Setup Alerts [X]

Edit Alert

Subject Lunch greater than 30 minutes

Body Long Lunch

Send To

Font [Black] **Background** [White]

Criteria Break

If **any ONE** **Paid** break

for any work day exceeds **30** minutes

Status Active Inactive **Bundled Emails**

Detailed email **Help** **Save** **Cancel**

You may choose:
"any ONE"
or
"the total of "ALL"

You may choose:
"Paid"
or
"Unpaid"

Enter minutes

Alerts Definitions – Shifts

Looks at the number of shifts that an employee has worked from their hire date, re-hire date or seniority date..

Setup Alerts [X]

Edit Alert

Subject 100 Shifts Worked

Body 100 Shifts have been worked

Send To LOUIS, JAMES

Font [Black] **Background** [White]

Criteria Shifts

More Than: MORE THAN | 100 | SHIFTS

Within: 999 | Days.

From The Employees': Hire Date |
Hire Date |
Re-Hire Date |
Seniority Date |

Status: Active Inactive **Bundled Emails**

Detailed email **Help** **Save** **Cancel**

You may choose:
"MORE THAN"
or
"LESS THAN"

Enter number of shifts

You may choose:
"Hire Date"
"Re-hire Date"
"Seniority Date"

Alerts Definitions – Missing Scans

Looks at the current date and finds missing scans.

Setup Alerts [X]

Edit Alert

Subject Missing Scans

Body Missing Scans

Send To LOUIS, JAMES

Font [Black] **Background** [White]

Criteria Missing Scans

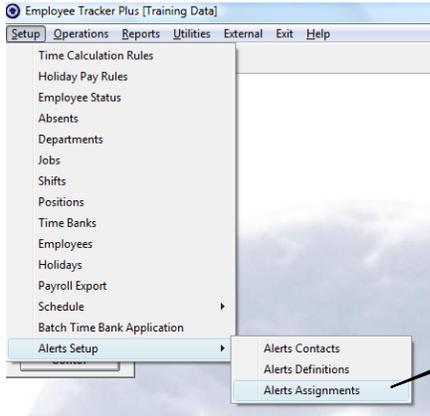
This Alert will send if employees have any Time Record Errors.
There are no options to refine this Alert type.

Status Active Inactive **Bundled Emails**

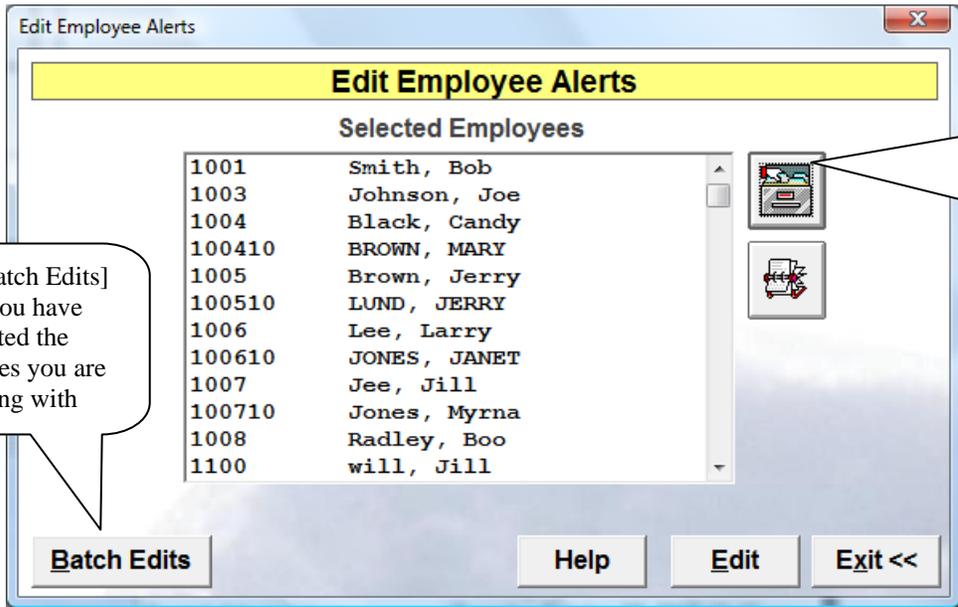
Detailed email **Help** **Save** **Cancel**

Assign Alerts

Each time you create an alert, or add a new employee or inactivate an employee you must assign alerts.



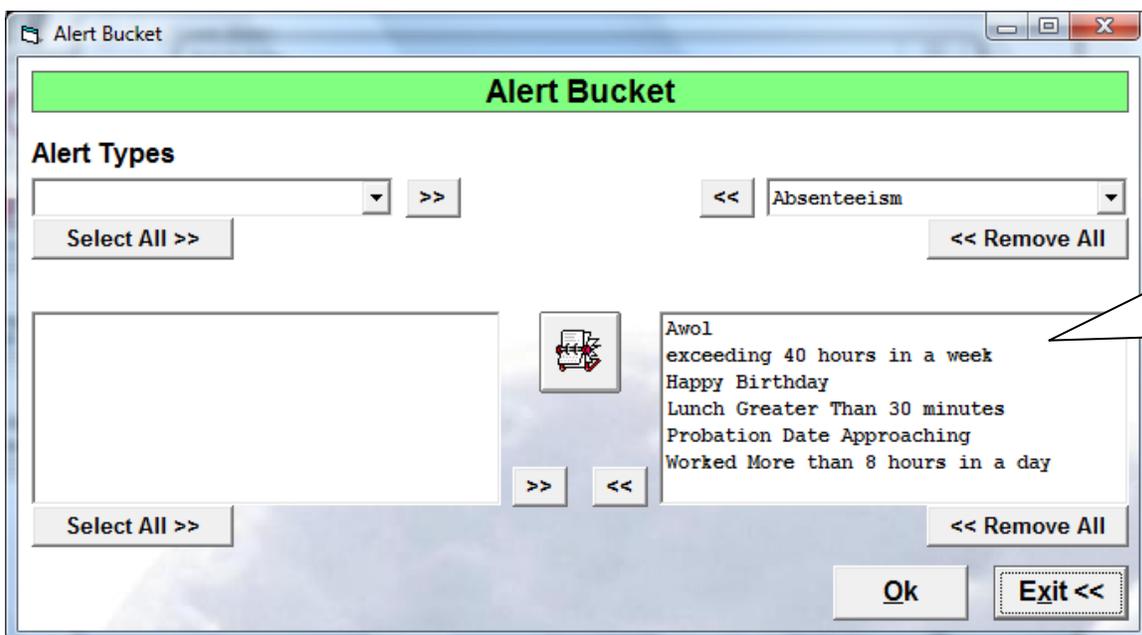
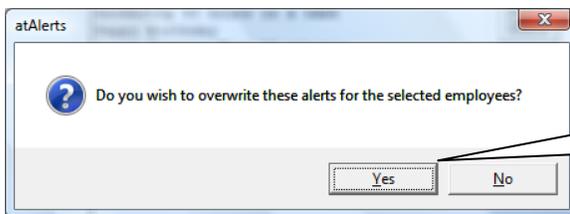
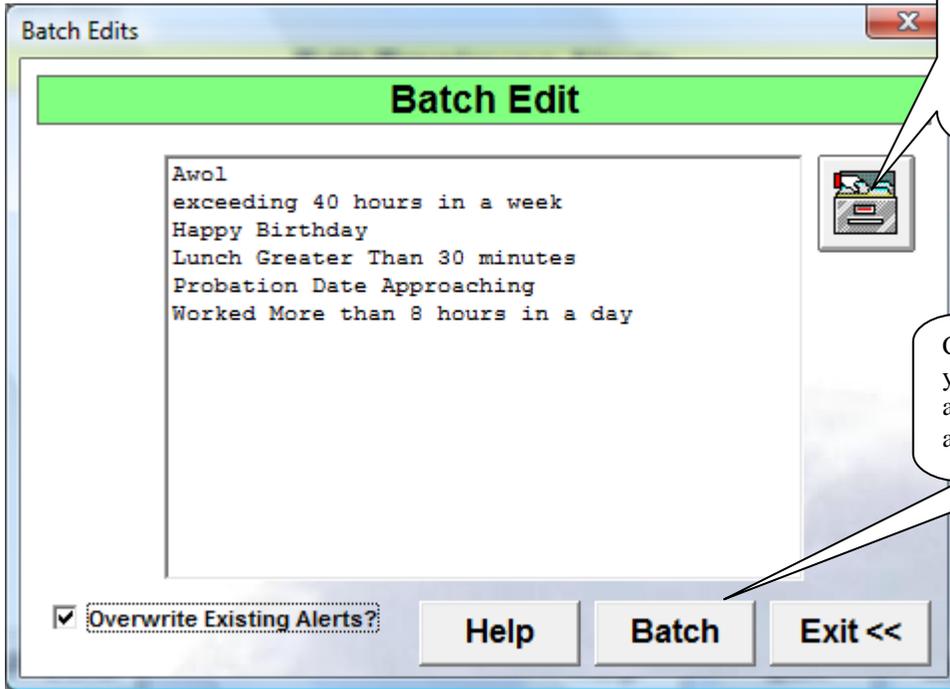
Select "Alerts Assignments"



Click [Batch Edits] after you have selected the employees you are working with

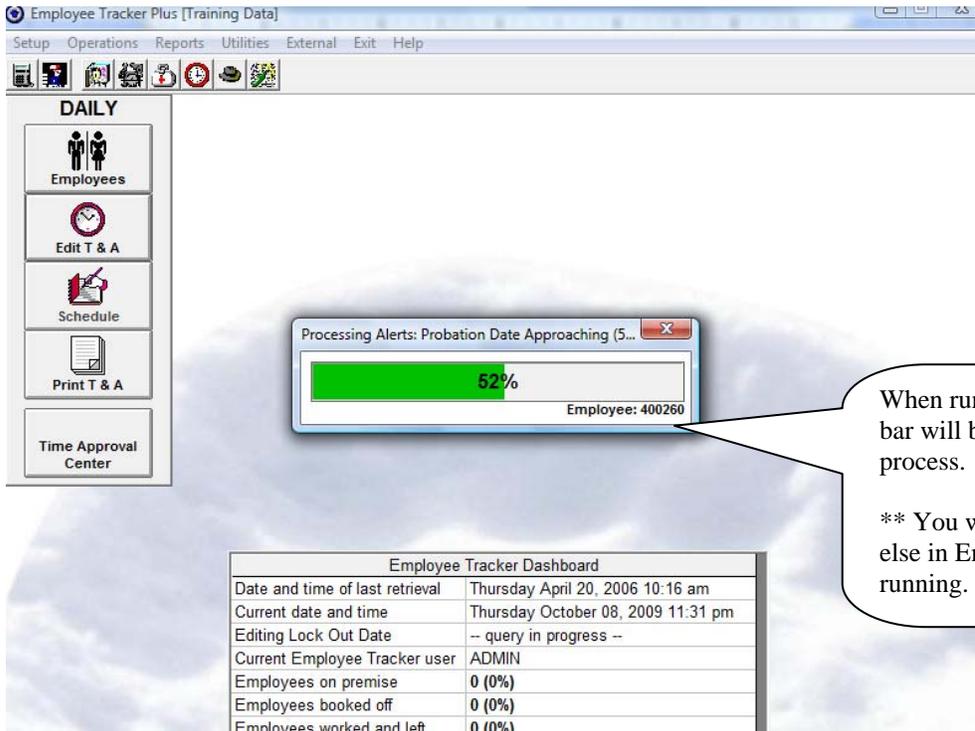
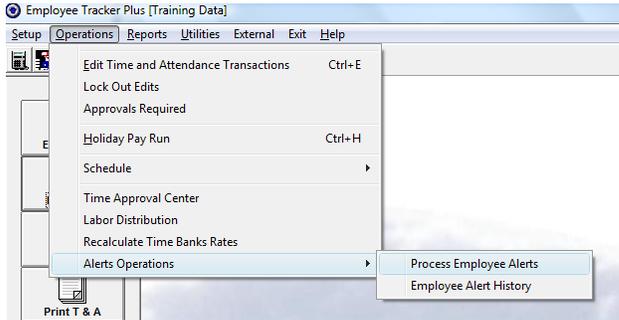
Select the employee(s) to assign alerts to. Typically if you create a new alert, select all active employees. If you hire a new employee just select that guy.

Assign Alerts - continued



Process Alerts

Alerts can be processed two ways. 1) Directly from the menu as displayed below. 2) As an independent process from your server by installing "ProcessAlerts.exe" and creating a scheduled task. **In either case you should seek assistance from your network administrator to activate this.**



When run from the menu. This progress bar will be displayed while the alerts process.

** You will not be able to do anything else in Employee Tracker while this is running. **

Employee Alerts History

