Manager Training Package

Goal: To accurately and efficiently manage employee’s time

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THE TEST URL IS: https://timeclocktest.sfasu.nac/app/manager

Pre Payroll Processing Checklist
Manager and Timekeepers will need to review and approve employee hours and outstanding exceptions before payroll processing can begin.

All employee time records must be approved by noon on:
- 17th – for hours worked the 1st – 15th
- 2nd – for hours worked the 16th – End of month

*If these dates fall on the weekend approvals will be due on the next Business day.

☐ Review time for pay period for any errors
  ☐ Review Time
☐ Manage Time- Make Corrections to Employee Time
  ☐ Adding segments
  ☐ Editing segments
  ☐ Deleting segments
☐ Manage Exceptions
  ☐ Manager Approval
  ☐ Missed Punches
  ☐ Overtime
  ☐ Conflicting Shifts
☐ Manage Missed Punches
  ☐ Edit and Verify Missed Punches
☐ Approve Exceptions/Approve Hours
  ☐ Manager Approval
  ☐ Missed Punches
  ☐ Overtime
  ☐ Conflicting Shifts
Review Time:
The purpose of reviewing time is to identify any errors in employee's worked hours during the period.

View Employee Time:

Log into TimeClock Manager

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

4. Review Employee Time for any errors or missed punches
5. Make corrections to employee time (See section for Manage Time)
Manage Time:
The purpose of managing time is to correct any errors in employee’s worked hours during the period.

Adding Employee Time

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

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

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

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

Manage Exceptions:

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

The Exception Filter allows you to filter segments based on the exceptions flagged on your Employee’s shifts. For example, if you are required to approve all Missed Punches before running payroll, you can filter all the segments worked that week to see just those segments that have unapproved Missed Punches so you can focus on editing/approving only Missed Punches.

3. Next, set the date range to “This Period” and click Update. This will load all your employees segments that have unapproved exceptions specific to the exceptions you checked off in the Exception Filter.

4. You can determine which segments still have exceptions that require approval by looking at the exceptions column.
   - If a segment has a red dot then there is an exception that still requires approval.
   - If a segment has a blue dot, or is blank, then all exceptions that require approval have been approved.

- You can hover over the red dot and listed under “Requires Approval” it will show which exceptions for that segment still require approval.
- Anything listed under “Exceptions” is informational only and does not require approval, but notifies you that a particular exception did occur during your employees shift.
Manage Missed Punches:

Missed punches occur when an employee performs a clock operation they are already on file as having done. For example, if an employee forgets to clock in after lunch and attempts to clock out at the end of the day, there will be a missed punch because the last clock operation was already a clock out.

Entering in a Blank Missed Punch:

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

If you've chose to record a blank time in/out and flag as a missed punch, then you will need to enter in a missed punch time on behalf of your employee. When you browse to either Individual Hours or Group Hours, you'll see segments that look like the ones below:

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

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

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

Correcting an Entered Missed Punch:

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

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

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

Approving an Entered Missed Punch:

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

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

When you browse to **Individual Hours** or **Group Hours** you will see segments that look like the ones below.
If the missed punch time that has been entered in (either by the Scheduler or the Individual) is correct, to approve the segment:

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

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

You can also approve multiple Missed Punch exceptions for multiple employees using the same methods described above in the Group Hours tool.
Approve Exceptions/ Approve Hours:
All exceptions that require approval need be approved for payroll to be processed.
Manager Approval is a separate process from approving Missed Punches and all other exceptions.

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

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