



Manager Training Package

Goal: To accurately and efficiently manage employee’s time

Table of Contents

Pre Payroll Processing Checklist..... 2

Review Time:.....3

View Employee Time: 3

Manage Time:..... 4

Adding Employee Time4

Editing Employee Time 5

Deleting Employee Time 6

Manage Exceptions:.....7

Manage Missed Punches..... 8

Entering in a Blank Missed Punch: 8

Correcting an Entered Missed Punch: 9

Approving an Entered Missed Punch: 9

Approve Exceptions/ Approve Hours: 11



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 or holiday, 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



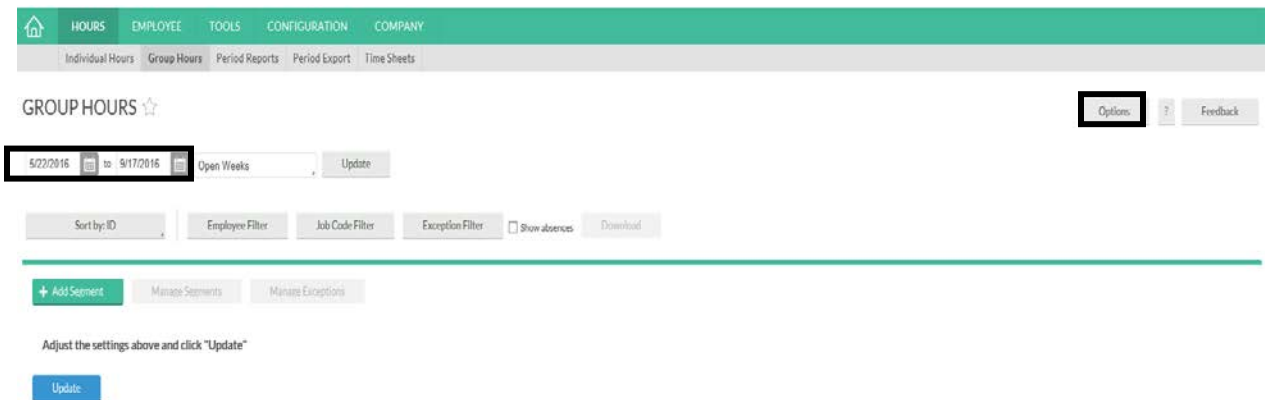
Review Time:



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:

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**.

Add Segment [?] [Feedback]

Segment Length: 8:00

Individual is clocked in

Time sheet entry

Missed in punch

Missed out punch

Time in: 9/14/2016 09:00 AM

Time out: 9/14/2016 05:00 PM

Break type: << NONE >>

Job Code: 1 - Tech

Cost Code: << NONE >>

Rate: 0.00

Substitutor for: << NONE >> [Select]

Note: [Text Field]

Days: 1

[Custom] [Extra] [Cancel] [Save]



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**.

Edit Segment ? Feedback

Segment Length: 4:30

Individual is clocked in

Time sheet entry

Edit actual time

Missed in punch

Missed out punch

Time in: 9/12/2016 07:30 AM

Time out: 9/12/2016 12:00 PM

Break type: Break

Job Code: 1 - Tech

Cost Code: << NONE >>

Rate: 0.00

Substitute for: << NONE >> Select

Note:

Custom Extra Cancel 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**.

The screenshot shows the TimeClock Plus interface for employee John Smith. At the top, there is a search bar with "John Smith" and a date range from 5/22/2016 to 9/17/2016. Below this are buttons for "Add Segment", "Manage Segments", and "Manage Exceptions". A confirmation dialog box is open in the center, asking "Are you sure you want to delete the selected segment(s)?" with "Cancel" and "Ok" buttons. Below the dialog is a table with 3 records. The first record is selected.

				Notes	Edited	Break Length	Time In	Time Out	Hours	Shift Total	Week Total	Job Code	Rate	S
<input checked="" type="checkbox"/>						Y	45u	9/12/2016 07:30 AM	9/12/2016 12:00 PM	4:30		1 - Tech	0.00	
<input type="checkbox"/>						Y		9/12/2016 12:45 PM	9/12/2016 04:00 PM	3:15	7:45	1 - Tech	0.00	



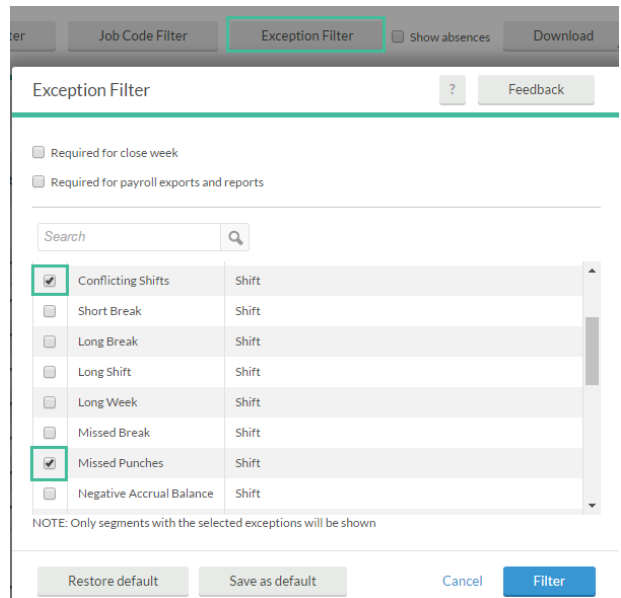
Manage Exceptions:

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.



	Notes	Edited	Break Length	Shift	Time In	Time Out	Hours	Shift Total	Week Total	Job Code	Cost Code	Rate	Substitute For
- 500 - Simon Blake													
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		11	Fri 9/16/2016 6:00 PM	Fri 9/16/2016 8:00 PM	2.00			300 - Daytime		0.00 + 0.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		12	Fri 9/16/2016 8:00 PM	Fri 9/16/2016 10:00 PM	2.00			350 - Nighttime		0.00 + 0.00	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		1	Fri 9/16/2016 10:00 PM	Sat 9/17/2016 12:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		2	Sat 9/17/2016 12:00 AM	Sat 9/17/2016 2:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		3	Sat 9/17/2016 2:00 AM	Sat 9/17/2016 4:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		4	Sat 9/17/2016 4:00 AM	Sat 9/17/2016 6:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		5	Sat 9/17/2016 6:00 AM	Sat 9/17/2016 7:00 AM	1.00	13.00	13.00	300 - Daytime		0.00 + 0.00	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		3	Mon 9/12/2016 8:00 PM	Mon 9/12/2016 10:00 PM	2.00			300 - Daytime		0.00 + 0.00	

- 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:



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:

The screenshot shows the 'Hours' tab for employee Tommy Kyne, covering the period from 8/14/2016 to 9/24/2016. Below the navigation buttons, a table displays two records:

					Notes	Edited		Time In	Time Out	Hours	Shift Total	Week Total
<input type="checkbox"/>						Y		9/20/2016 08:00 AM	<< Missed >>	0:00	0:00	
<input type="checkbox"/>								9/21/2016 09:25 AM	<< Clock In >>	0:00	0:00	0:00

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.



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.

The screenshot shows the 'Hours' tab for employee Tommy Kyne. It includes a date range from 8/14/2016 to 9/24/2016 and a table of segments. The table has columns for Time In, Time Out, Hours, Shift Total, and Week Total. Two records are displayed:

					Notes	Edited		Time In	Time Out	Hours	Shift Total	Week Total
<input type="checkbox"/>						Y		9/20/2016 08:00 AM	9/20/2016 05:00 PM	9:00	9:00	
<input type="checkbox"/>								9/21/2016 09:32 AM	<< Clocked In >>	0:00	0:00	9:00



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:

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**.

	Unapprove	Approve
Employee Approval	<input type="radio"/>	<input type="radio"/>
Manager Approval	<input type="radio"/>	<input checked="" type="radio"/>
Other Approval	<input type="radio"/>	<input type="radio"/>
Missed Break	<input type="radio"/>	<input type="radio"/>
Long Shift	<input type="radio"/>	<input type="radio"/>
Short Shift Gap	<input type="radio"/>	<input type="radio"/>

Apply

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