

Time Clock Plus

SUPERVISOR INSTRUCTIONS

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July 26, 2017

Chapter 1

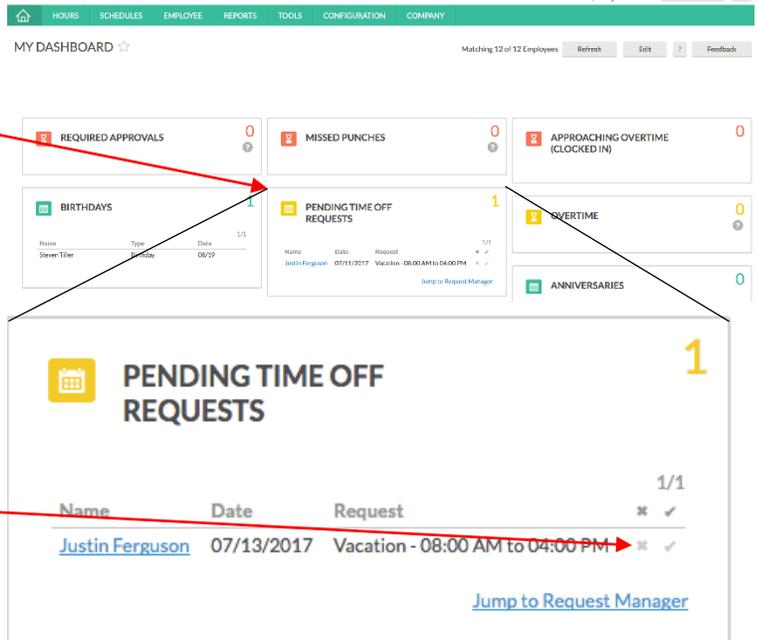
Approve Leave

There are three methods for approving leave requests:

- From the portlet** The fastest method
- From the calendar view** Useful for comparing overlapping requests
- From the list view** Allows approve/deny for multiple requests at once

From the portlet:

Look for "Pending Time Off Requests"

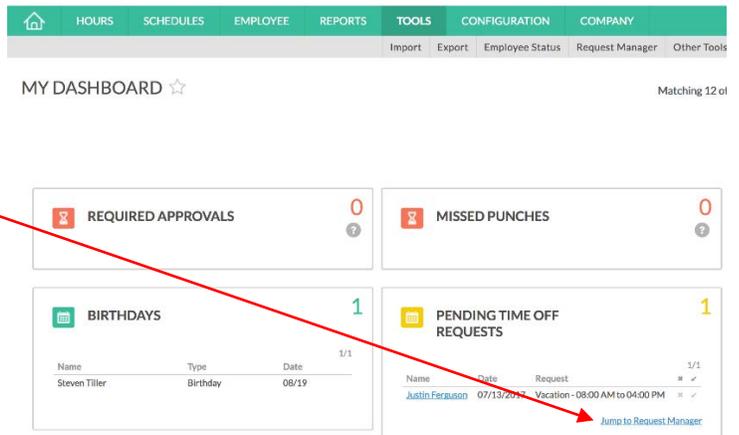


- Approve by clicking ✓
- Deny by clicking ✗

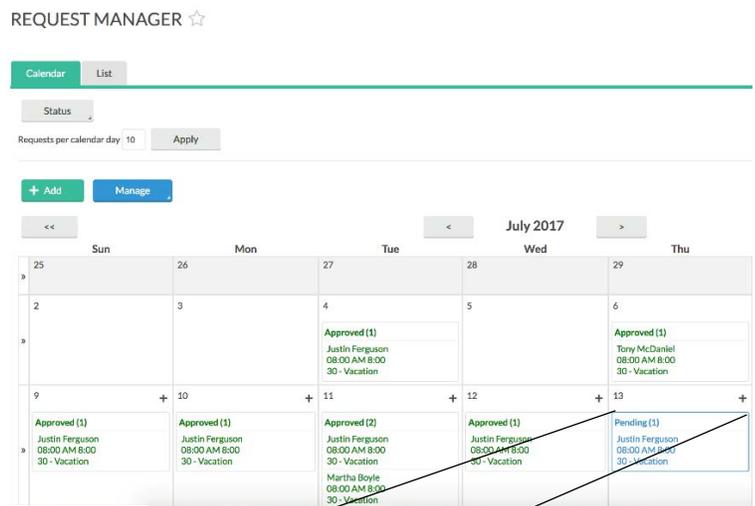
Done!

From the calendar view:

Click the link to "Jump to Request Manager"

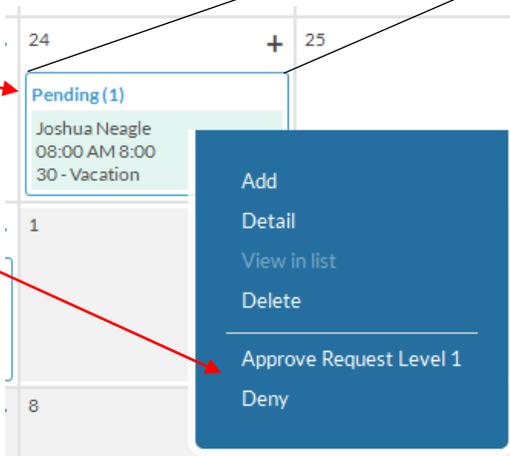


The current month will be displayed. This view is helpful for seeing any overlapping requests.



Right-click the "Pending" day off

Select Approve or Deny.

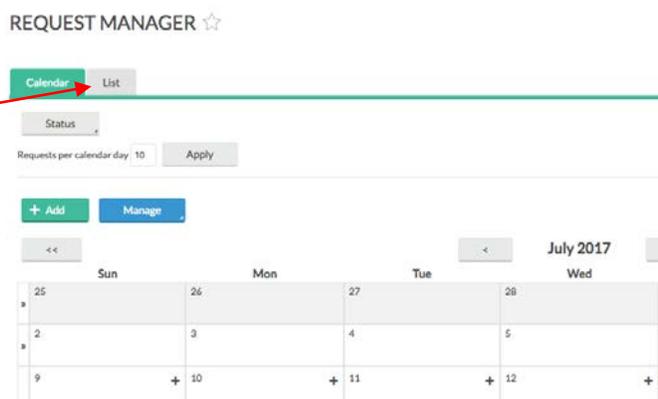


Done!

From the list view:

Jump to the Request Manager

Click on "List"



REQUEST MANAGER ☆

Change the "Status" to only "Include Pending".

The screenshot shows the 'REQUEST MANAGER' interface with the 'List' tab selected. A dropdown menu for 'Status' is open, showing three options: 'Include pending' (checked), 'Include approved', and 'Include denied'. To the right, there is a date range field showing '07/11/2017' and a calendar icon, followed by an 'Open Weeks' dropdown and an 'Update' button.

REQUEST MANAGER ☆

You can change how they are grouped if that is helpful.

The screenshot shows the 'REQUEST MANAGER' interface with the 'List' tab selected. A dropdown menu for 'Group by' is open, showing 'Request Date' selected. Below it, there is a date range field showing '7/9/2017' to '7/22/2017' with calendar icons, followed by an 'Open Weeks' dropdown and an 'Update' button.

Adjust the time frame to include additional months if needed (ex "Next 12 Months")

Then Select "Update"

Select the box at the top to Select All

or
Select the box next to each request

The screenshot shows the 'REQUEST MANAGER' interface with the 'List' tab selected. There are buttons for '+ Add', 'Manage', 'Expand all', and 'Collapse all'. Below these, it says 'Showing 1 records of 1 Selected 0 records'. A table is displayed with the following columns: ID, Name, Date Submitted, Notice Days, Request Date, and Time. The table contains one row with the following data: ID: 3005, Name: Justin Ferguson, Date Submitted: 07/20/2017, Notice Days: -8, Request Date: 07/11/2017, Time: 08:00 AM 8:00. There are checkboxes in the first column of the table.

REQUEST MANAGER ☆

Select Manage

Select Approve or Deny

Done!

The screenshot shows the 'REQUEST MANAGER' interface with the 'List' tab selected. A dropdown menu for 'Manage' is open, showing options: 'Add', 'Detail', 'View in calendar', 'Delete', 'Approve Request Level 1', and 'Deny'. The table from the previous screenshot is visible in the background, with the first row selected. The 'Approve Request Level 1' and 'Deny' options are highlighted in the dropdown menu.

Chapter 2

Add Leave for an employee

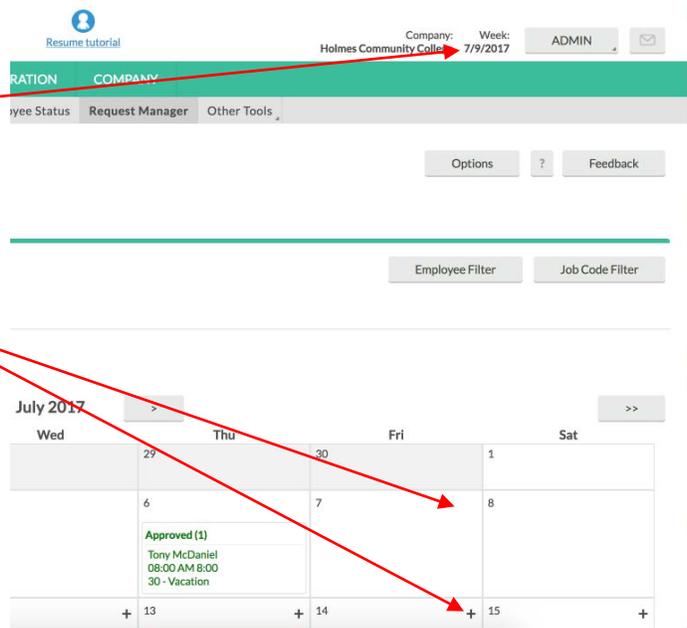
Employees should be requesting their own leave, however, there are some exceptions that may require the supervisor to enter Leave Requests.

There are two methods for adding Leave:

- Add Leave During Open Weeks** The easiest and best method
- Add Leave During Closed Weeks** Necessary when weeks have been closed – not visible on employee calendar

First determine if the week has been closed:

All weeks prior to the date in the top right corner have been closed.



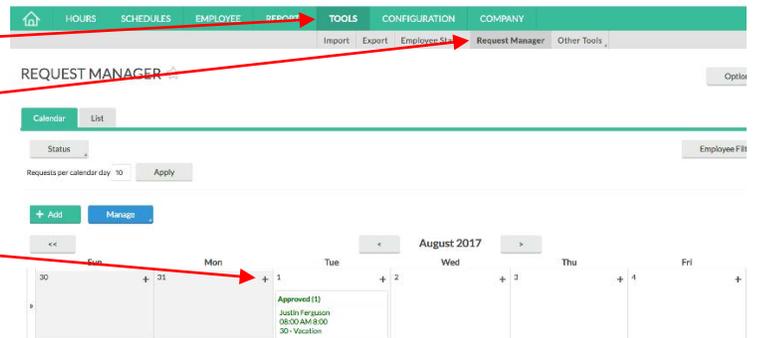
Also, the “+” sign will not show on the Request Manager for weeks that are closed

Add Leave During Open Weeks

Select “Tools”

Select “Request Manager”

Select the “+” sign next to the first day of leave needed.



Choose the employee first

Select a template.

Change the start time and number of hours if needed for hourly employees.

You can change the number of days if they are consecutive.

It is recommended to change the description to remember why you entered the leave.

Check the box next to "Approve Request" or you'll need to approve it later the normal way.

Save

Add Employee Request



Feedback

Employee Justin Ferguson [3005]

Date requested 7/14/2017

Start time 08:00 AM

Hours 8:00

Days 1

Leave Code 20 - 12 Mth Sick

Description Out with Flu - KB

Approve request

Done!

Accruals

Cancel

Save

Add Leave During Closed Weeks

Important: Your employee will not see leave on their calendar if entered during closed weeks.

Select "Hours"

Select "Individual Hours"

Search if necessary or

Select the employee

TimeClock Plus

Search

Home HOURS SCHEDULES EMPLOYEE REPORT

Individual Hours Group Hours Period Export Time Sh

INDIVIDUAL HOURS ☆

Sort by: ID ↑ Employee Filter

Search

Showing 12 records of 12

1039	John Baker
1421	Jesse Nichols
1541	Tammy Collins

No employee is selected

INDIVIDUAL HOURS ☆

Select "Accruals"

Click the ledger link next to sick or vacation.
(Extraordinary Days are entered as Sick)

Sort by: ID ↑ Employee Filter

Search [] Hours Schedules **Accruals**

Showing 11 records of 11

1039 John Baker Select forecast date: 7/26/2017 Update

1421 Jesse Nichols

1541 Tammy Collins

2614 Kelli []

3005 Justin Ferguson

00000 John Leonard

Ledger	Accrual Bank ↑	Accrued	Accrual Forecast	Used	Used Forecast
[]	12 Mth Sick	2784.0000	0.0000	0.0000	0.0000
[]	12 Mth Vacation	216.0000	0.0000	104.0000	0.0000

Manage Accruals (12 Mth Vacation - 30) ? Feedback

Select "Add"

View entire history View selected period

1/1/2017 to 7/19/2017 Year To Date Update Download

+ Add

Accrued 200.0000
Used 96.0000
Remaining 104.0000

Edit	Delete	Date Posted	Accrued	Used	Excess	Adjustment	Imported	Manual	Rule ID	Rule Name	Notes
[]	[]										

Accrual Ledger - Add ? Feedback

Set the Date

Very Important! Enter the hours taken.

For Salary it should be 4 or 8 hours

For Hourly:

it should be for the hours taken off

or

it needs to be the full amount for their shift (ex. 8, 10 or 12 hours)

It is recommended to enter notes to remember why you entered it.

Then select "OK"

Date posted: 7/22/2017

Accrual Bank: 12 Mth Sick

Amount accrued: 0.0000

Amount taken: 8.0000

Accrued over limit: 0.0000

Note: Out with Flu KB

Cancel Ok

Save

Done!

Manage Accruals (12 Mth Vacation - 30) ? Feedback

View entire history View selected period

1/1/2017 to 7/20/2017 Year To Date Update Download

+ Add

Accrued 112.0000
Used 24.0000
Remaining 88.0000

Edit	Delete	Date Posted	Accrued	Used	Excess	Adjustment	Imported	Manual	Rule ID	Rule Name	Notes
[]	[]	07/01/2016	16.0000	0.0000	0.0000	X	X	X	17	10-15 Years Vacation	
[]	[]	08/01/2016	8.0000	0.0000	0.0000	X	X	X	12	August Vacation	
[]	[]	09/01/2016	8.0000	0.0000	0.0000	X	X	X	13	September Vacation	
[]	[]	10/01/2016	8.0000	0.0000	0.0000	X	X	X	14	October Vacation	

Cancel Save

Chapter 3 Delete Leave for an employee

You will need to do all 3:

Delete from Request Manager (Calendar)

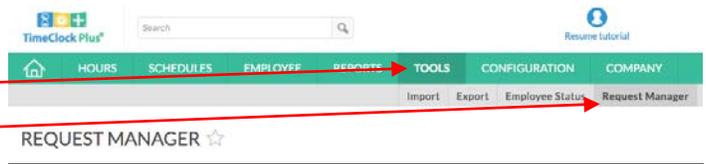
Delete from Timesheet

Delete or Confirm in Ledger

Request Manager

Select "Tools"

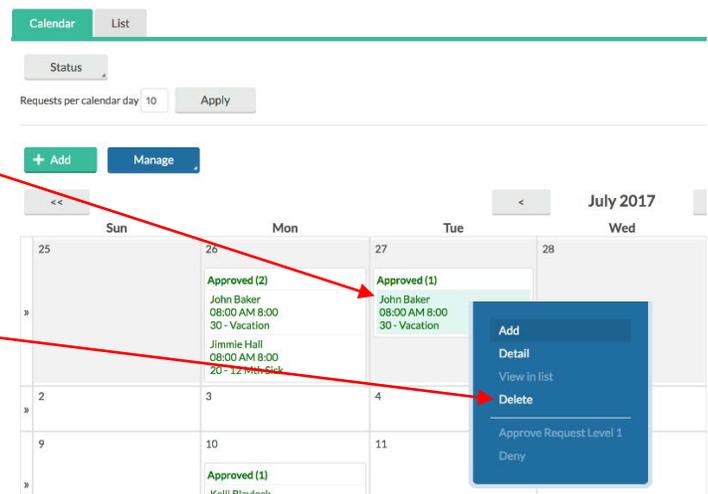
Select "Request Manager"



Locate the entry you wish to delete in the calendar

Right click

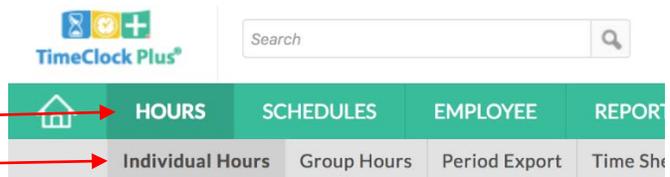
Select "Delete"



Timesheet

Select "Hours"

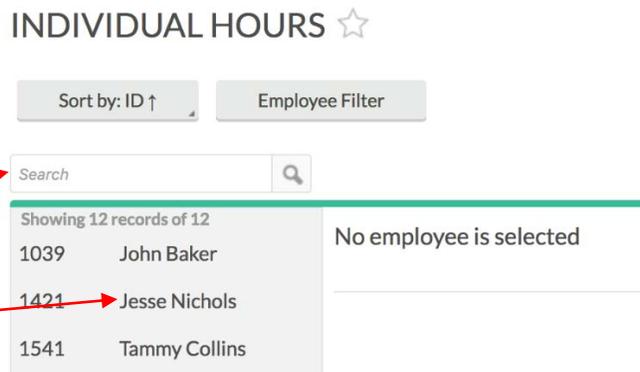
Select "Individual Hours"



Search if necessary

or

Select the employee



Locate the entry that needs to be deleted.

Confirm the Job Code

Confirm the Date

Place a check mark in the far left box

Y	7/10/2017 08:00 AM	7/30/2017 08:00 AM	8:00	8:00	16:00	50 - Holiday
Y	7/11/2017 08:00 AM	** Time sheet **	8:00	8:00		30 - Vacation
Y	7/11/2017 08:00 AM	7/11/2017 09:15 AM	1:15	1:15		1 - Hourly

Select "Manage"

Select "Delete"

Justin Ferguson

7/9/2017 to 7/22/2017 Open Weeks Update

+ Add Manage Exceptions Processing Resolve Period

Edit Delete Audit Log

id	Time In	Time Out	Hours	Shift Total
Y	7/9/2017 08:00 AM	<< Time sheet >>	8:00	8:00

Ledger

Select "Accruals"

Select the Ledger icon (Sick or Vacation)

Sort by: ID ↑ Employee Filter

Search Hours Schedules **Accruals**

Select forecast date: 7/26/2017 Update

Ledger	Accrual Bank ↑	Accrued	Accrual Forecast	Used	Used Forecast
12 Mth Sick		2784.0000	0.0000	0.0000	0.0000
12 Mth Vacation		216.0000	0.0000	104.0000	0.0000

Manage Accruals (12 Mth Sick - 20) ? Feedback

Select "View selected period"

Make sure the date range includes the date that was deleted.

Delete it by selecting the delete icon.

or

Confirm the entry doesn't exist

View entire history View selected period

1/1/2017 to 7/26/2017 Year To Date Update Download

+ Add

Edit	Delete	Date Posted	Accrued	Used	Excess	Adjustment	Imported	Manual	Rule ID	Rule Name	Notes
	🗑️	07/01/2017	96.0000	0.0000	0.0000	X	X	X	3	12 Mth & Hourly Sick	
	🗑️	07/01/2017	104.0000	0.0000	0.0000	X	✓	X		Annual Roll To Sick Leave	

Accrued 200.0000
Used 0.0000
Remaining 200.0000

Select "Save"

Done!

Cancel Save

Chapter 4

Review Leave Accrual, Usage, and Balances

Select "Reports"
 Select "Period Reports"
 Choose the time frame by:
 Setting the date range
 or
 Select from the menu

PERIOD REPORTS ☆

Options

Employee Filter

7/23/2017 to 7/29/2017 TimeClock Week

Categories	Select a report
Payroll	Accrual Usage * = Custom Report
Job Code	Employee Accrual Bank
Scheduler	Future Cost of Accruals
Period	Period Accrual
Accruals	Review Leave Accrual, Usage and Balances *
Miscellaneous	Roll Leave2 *

Download
Settings
Preview
Print
Create Saved Report

Select "Accruals"
 Select "Review Leave Accrual, Usage, and Balances"

Select "Preview"
 Or "Print"

PERIOD REPORTS ☆

Options

Employee Filter

7/23/2017 to 7/29/2017 TimeClock Week

Categories	Select a report
Payroll	Accrual Usage * = Custom Report
Job Code	Employee Accrual Bank
Scheduler	Future Cost of Accruals
Period	Period Accrual
Accruals	Review Leave Accrual, Usage and Balances *
Miscellaneous	Roll Leave2 *

Download
Settings
Preview
Print
Create Saved Report

Done!

Advanced Tips:

Filter by Employee
 (Use to view a single employee)

PERIOD REPORTS ☆

Options

Employee Filter

7/23/2017 to 7/29/2017 TimeClock Week

Categories	Select a report
Payroll	Accrual Usage * = Custom Report
Job Code	Employee Accrual Bank
Scheduler	Future Cost of Accruals
Period	Period Accrual
Accruals	Review Leave Accrual, Usage and Balances *
Miscellaneous	Roll Leave2 *

Download
Settings
Preview
Print
Create Saved Report

Select "Employee ID"

"Select"

Employee Filter

Employee Status

Employee ID

Job Code

Classification

Department

Location

Schedule Group

Manager

Hire Date

Days Employed

Custom Fields

Summary

Include

1541

Example: 1-5,8,10-1000

Select

1 of 11 employees match

Cancel Filter

Remove all check marks by selecting the top box

Select the employee

Select

Select Employees

Search

Active only

Showing 11 records of 11 Selected 1 records

<input type="checkbox"/>	ID↑	First Name	Last Name	Export Code	Department	Classification	Role
<input type="checkbox"/>	1039	John	Baker	H00001039	17322		5
<input type="checkbox"/>	1421	Jesse	Nichols	H00001421	27322		5
<input type="checkbox"/>	1541	Tammy	Collins	H00001541	17322		5
<input checked="" type="checkbox"/>	2614	Kelli	Blaylock	H00002614	17322		5
<input type="checkbox"/>	3005	Justin	Ferguson	H00003005	17322		5
<input type="checkbox"/>	99993	John	Lepard	H00099993	17322		6
<input type="checkbox"/>	99994	Kevin	Lepard	H00099994	17322		5
<input type="checkbox"/>	121418	James	Costilow	H00121418	37322		5

Cancel Select

Select "Filter"

Now run the report and it will only include the Employee selected

Employee Filter

Employee Status

Employee ID

Job Code

Classification

Department

Location

Schedule Group

Manager

Hire Date

Days Employed

Custom Fields

Summary

Include

1541

Example: 1-5,8,10-1000

Select

1 of 11 employees match

Cancel Filter

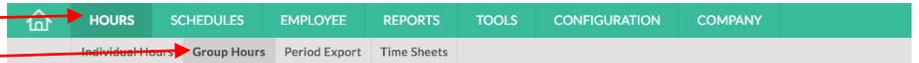
Chapter 5 Approve Timesheets

Important Note!

Every Monday, Supervisors are responsible for checking all of their employees' hours for the previous week. Check for missed punches or time that needs to be corrected. Enter sick or vacation if needed. Then approve those hours before 3:30pm.

Select "Hours"

Select "Group Hours"



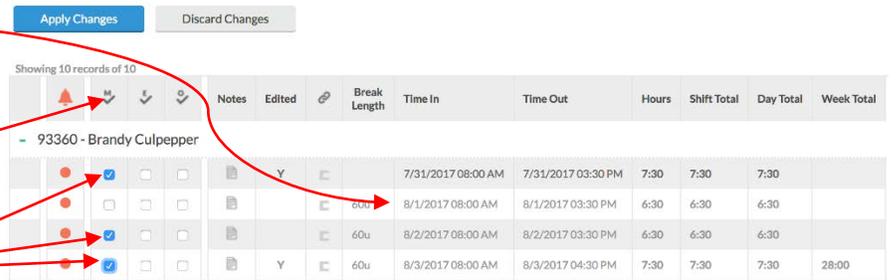
Select the drop down menu and

Select "Last Week"

Select "Update"



Review the employee's time

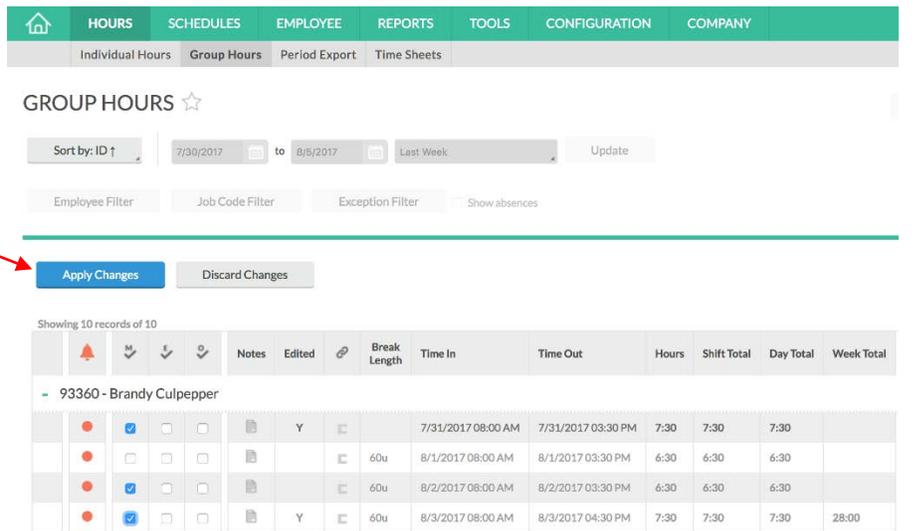


If all of the time is correct for all employees, click here.

Or

Select the entries that are correct

Select "Apply Changes"



Done!

Chapter 6

Edit Timesheet Entries

Select "Hours"

Select "Group Hours"

The screenshot shows a navigation bar with the following tabs: HOURS, SCHEDULES, EMPLOYEE, REPORTS, TOOLS, CONFIGURATION, and COMPANY. Below this is a sub-menu with 'Individual Hours', 'Group Hours', 'Period Export', and 'Time Sheets'. The 'HOURS' tab is highlighted in green, and a red arrow points to it. Another red arrow points to the 'Group Hours' sub-menu item.

Select the entry that you wish to edit.

The screenshot shows the 'GROUP HOURS' interface. At the top, there are filters for 'Sort by: ID ↑', a date range from '7/30/2017' to '8/5/2017', and a 'Last Week' dropdown. Below are filters for 'Employee Filter', 'Job Code Filter', and 'Exception Filter'. A row of buttons includes '+ Add', 'Manage', 'Exceptions', 'Processing', and 'Resolve Period'. A table shows 10 records for employee '93360 - Brandy Culpepper'. The table columns are: Break Length, Time In, Time Out, Hours, Shift Total, Day Total, and Week Total. The second row is selected, showing a break length of 60u from 8/1/2017 08:00 AM to 8/1/2017 03:30 PM.

Select "Manage"

Select "Edit"

The screenshot shows the 'Manage' dropdown menu open. The menu items are: Edit, Delete, Split segment by length, Split segment by percentage, Add break, Toggle break, Audit Log, and View segment photos. The 'Edit' option is highlighted with a blue background and a red arrow points to it.

Make the changes needed.

Save

The screenshot shows the 'Edit Segment' form. On the left, there are checkboxes for 'Individual is clocked in', 'Time sheet entry', 'Edit actual time', 'Missed in punch', and 'Missed out punch'. On the right, there are input fields for 'Time in' (8/1/2017, 08:00 AM), 'Time out' (8/1/2017, 03:30 PM), 'Break type' (NONE), 'Job Code' (3 - Salary Non-Exempt), 'Rate' (0.00), and 'Note'. A 'Segment Length: 7:30' indicator is at the top right. At the bottom, there are 'Custom', 'Extra', 'Cancel', and 'Save' buttons. A red arrow points from the 'Make the changes needed.' text to the 'Time in' field.

Done!

Chapter 7

Delete Timesheet Entries

Select "Hours"

Select "Group Hours"

GROUP HOURS ☆

Sort by: ID ↑ | 7/30/2017 to 8/5/2017 | Last Week | Update

Employee Filter | Job Code Filter | Exception Filter | Show absences

+ Add | Manage | Exceptions | Processing | Resolve Period

Showing 10 records of 10 | Selected 1 records

	Notes	Edited	Break Length	Time In	Time Out	Hours	Shift Total	Day Total	Week Total
- 93360 - Brandy Culpepper									
<input type="checkbox"/>		Y		7/31/2017 08:00 AM	7/31/2017 03:30 PM	7:30	7:30	7:30	
<input checked="" type="checkbox"/>			60u	8/1/2017 08:00 AM	8/1/2017 03:30 PM	6:30	6:30	6:30	
<input type="checkbox"/>			60u	8/2/2017 08:00 AM	8/2/2017 03:30 PM	6:30	6:30	6:30	
<input type="checkbox"/>		Y	60u	8/3/2017 08:00 AM	8/3/2017 04:30 PM	7:30	7:30	7:30	28:00

Select the entry that you wish to edit.

GROUP HOURS ☆

Sort by: ID ↑ | 7/30/2017 to 8/5/2017 | Last Week | Update

Employee Filter | Job Code Filter | Exception Filter | Show absences

+ Add | Manage | Exceptions | Processing | Resolve Period

Showing 10 reco

- Manage
- Edit
- Delete
- Split segment by length
- Split segment by percentage
- Add break
- Toggle break
- Audit Log
- View segment photos

	Break Length	Time In	Time Out
<input type="checkbox"/>		7/31/2017 08:00 AM	7/31/2017 03:30 PM
<input checked="" type="checkbox"/>	60u	8/1/2017 08:00 AM	8/1/2017 03:30 PM
<input type="checkbox"/>	60u	8/2/2017 08:00 AM	8/2/2017 03:30 PM
<input type="checkbox"/>	60u	8/3/2017 08:00 AM	8/3/2017 04:30 PM

Select "Manage"

Select "Delete"

Select "OK"

Are you sure you want to delete the selected segment(s)?

Done!

Cancel | **OK**

