



## Timeclock Plus Supervisor Guide

October 2020 V1.0

## Table of Contents

Table of Contents .....	2
Timekeeping Expectations for Supervisors .....	4
Logging into TimeClock Plus / TimeClock Manager .....	5
Schedules and Meal Deductions .....	6
The Importance of Assigning Schedules and Automatic Meal Deductions .....	6
Assigning a Recurring Schedule .....	6
Ending a Recurring Schedule .....	7
Configuring an Employee's Automatic Meal Deduction .....	8
Ending an Employee's Automatic Meal Deduction .....	9
<b>Timecards .....</b>	<b>11</b>
Accessing Timecards.....	11
Update Hours Settings (Recommended).....	11
Approving a Timecard .....	12
<b>Missing Punches and Non-clockable Hours.....</b>	<b>14</b>
To Add a Missed In Punch (for an employee who has not yet clocked out).....	14
To Add a Missed In or Out Punch (for an employee who has clocked out).....	14
To Add a Full Day's Time: .....	15
To Add Non-Clockable Hours (e.g., University Business, Sick, Vacation, etc.): .....	15
<b>Removing an Automatic Meal Deduction .....</b>	<b>15</b>
<b>Moving Overtime to Comp Time Earned .....</b>	<b>16</b>
Moving an Individual Segment .....	16
Splitting an Individual Segment .....	17
<b>Viewing and Managing Exceptions:.....</b>	<b>19</b>
To Access Exceptions:.....	19
<b>Reviewing Time-Off Requests: .....</b>	<b>21</b>
Viewing Requests Submitted:.....	21
<b>Managing Time-Off Requests: .....</b>	<b>22</b>
Adding Requests for Employees:.....	22
Editing Requests Submitted by Employees .....	23
Approving/ Denying Time-Off Requests .....	25

Approving a Time-Off Request: .....	25
Denying Time-Off Requests .....	25
Deleting Time-Off Requests .....	26
<b>Employee Accrual Balances: .....</b>	<b>27</b>
Viewing Employees' Accrual Balance .....	27
<b>Viewing Approved Leave Time: .....</b>	<b>29</b>
User Delegation.....	30

## Timekeeping Expectations for Supervisors

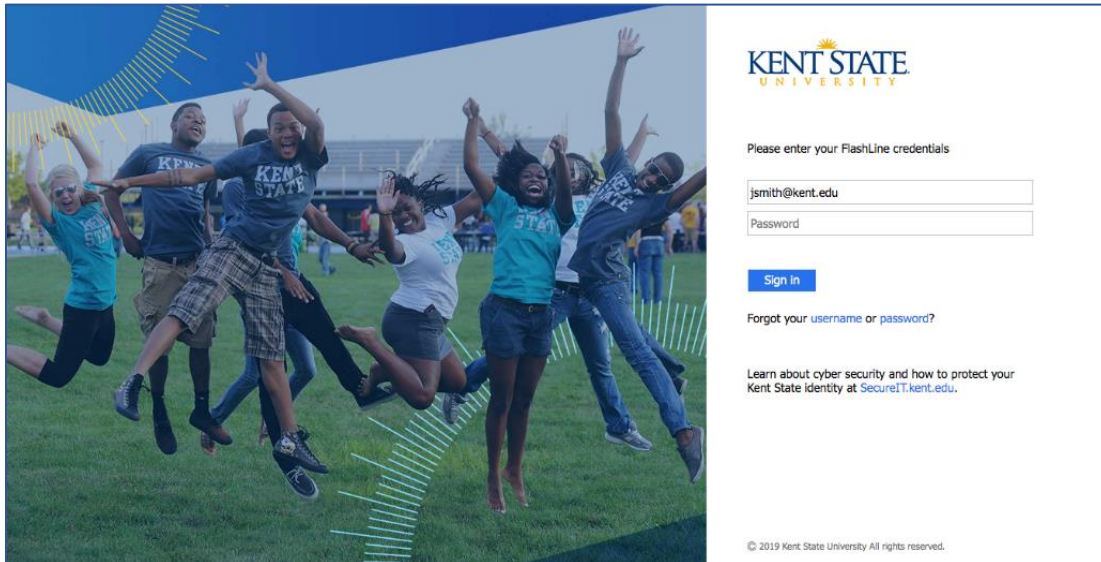
TimeClock Plus is Kent State University's timekeeping system. Supervisors must use the TimeClock Plus TimeClock Manager to perform the following required activities:

- Reviewing employee timecards to ensure that the hours stated on them are correct.
- Correcting all errors and exceptions.
- Approving or denying all leave requests.
- Creating recurring schedules and automatic meal breaks for all non-student employees.
- **Approving all timecards by the end of the day every Tuesday  
(unless an earlier deadline is imposed due to holiday payroll processing.)**

It is imperative that timecards be approved by the stated weekly deadline (end of day Tuesday), for payroll processing to proceed in a timely manner.

## Logging into TimeClock Plus / TimeClock Manager

1. Navigate to the **TimeClock Manager** page at <https://ksuwm.kent.edu/>
2. In the Kent State University sign in screen, enter your KSU ID and Password



3. This will navigate to the TimeClock Manager **Dashboard**. The dashboard contains the following widgets, which are informational and/or provide shortcuts to pages within the site that you may need to access.
  - a. Missed Punches
  - b. Required Approvals
  - c. Approaching Overtime (Clocked In)
  - d. Conflicting Segments
  - e. Overtime
  - f. Pending Time Off Requests
  - g. Reminders
4. By clicking on the **Edit** button in the upper right corner of your dashboard, you can add, remove, and move widgets, as well as change their settings. Be sure to click **Save** if you make any changes.

## Schedules and Meal Deductions

### The Importance of Assigning Schedules and Automatic Meal Deductions

Supervisors must assign schedules and automatic meal deductions to all non-student employees. Assigning schedules ensures that hours for university-observed holidays will be added to employee timesheets. Likewise, assigning automatic meal deductions allows employees to take their meal breaks without clocking out and in. Assigning schedules and meal breaks to student employees is optional.

**Note:** Hours for university-observed holidays are added to non-student timecards at the rate of 8.0 hours for full-time employees, and 4.0 hours for part-time employees. The number of holiday hours on employee timecard should be adjusted by a Supervisor when the number of normal work schedule hours for the employee is greater than the number of hours automatically populated for that day.

The instructions below describe how to add a recurring schedule. For more information about other methods of adding schedules, refer to the **TimeClock Plus Scheduler Guide**.

### Assigning a Recurring Schedule

**Note:** If the employee already has a recurring schedule, it must be ended before a new one can be added.

1. Select **Schedules > Employee**
2. Select the name of the employee and the **Recurring** tab

The screenshot shows the 'EMPLOYEE SCHEDULES' interface. At the top, there are buttons for 'Sort by: ID ↑' and 'Employee Filter'. Below these is a search bar and two tabs: 'Overrides' and 'Recurring', with 'Recurring' being the active tab. A message indicates 'Showing 11 records of 11'. A table lists employees, with the first row highlighted: '4545 C1employee C1emp'. To the right of the table, there are dropdown menus showing 'C1employee C1employee' and 'ID 4545'.

3. Click the check box for **Override role settings** (only for employees with no current schedule) and the **Assign** button.

This screenshot shows a detailed view of the 'Recurring' tab. At the top, there is a checkbox labeled 'Override role settings' which is checked. Below it is a green button with a plus sign and the text '+ Assign'. A message indicates 'Showing 0 records of 0'. Below this is a table with columns: 'Edit', 'Unassign', 'Start Date', 'Stop Date', and 'Description'. The table is empty, and a message at the bottom states 'No records found'.

4. In the **Assign Recurring Schedules** window
  - a. Enter the date when the schedule should take effect. Optionally, you may enter an end, or “to” date. If no end date is entered, the schedule will continue indefinitely (this is preferred for non-student employees.)
  - b. Click the **Use recurring schedule** radio button and choose the appropriate schedule from the list. (Contact Payroll if the schedule that you need does not appear in the list.)
  - c. Click **Assign** and **Save**.

Assign Recurring Schedules

10/18/2020 to M/d/yyyy

☐ Use company wide recurring schedule

☒ Use recurring schedule

<< NONE >>

6:00am-2:30pm, M-F

7:00am-3:30pm, M-F

7:30am-4:00pm, M-F

7:30am-4:30pm, M-F

8:00am-4:30pm, M-F

Cancel Assign

### Ending a Recurring Schedule

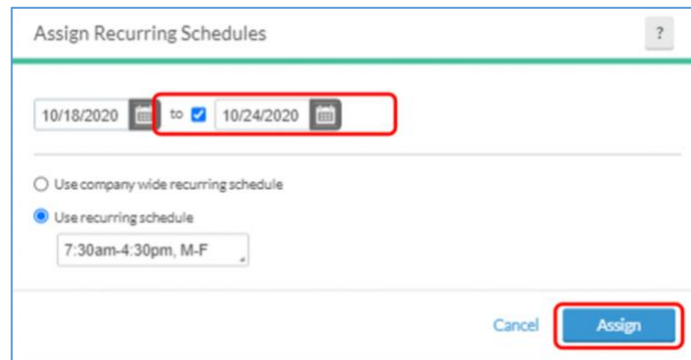
1. Select **Schedules > Employee**
2. Select the employee’s name and the **Recurring** tab
3. Click on the pencil icon that is in the **Edit** column to the left of the schedule that you would like to end.

+ Assign

Showing 1 records of 1

Edit	Unassign	Start Date ↓	Stop Date	Description
		10/18/2020		7:30am-4:30pm, M-F

4. In the **Assign Recurring Schedules** window, enter an ending or “to” date.

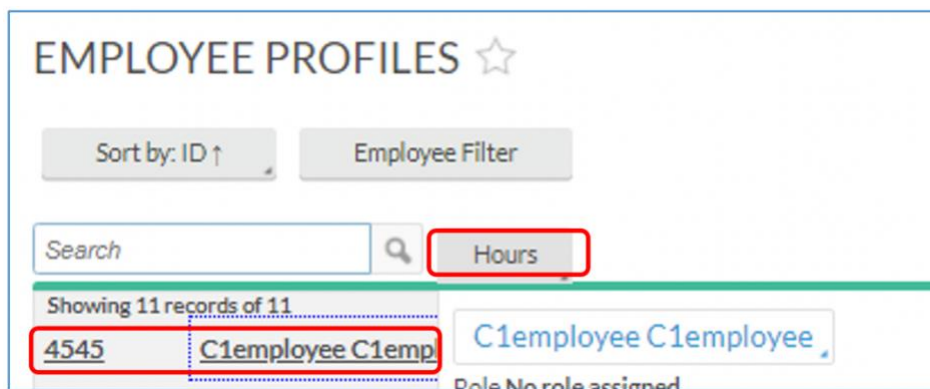


The 'Assign Recurring Schedules' window shows a date range from 10/18/2020 to 10/24/2020, with a 'to' checkbox selected. Below this, there are radio buttons for 'Use company wide recurring schedule' and 'Use recurring schedule' (which is selected). A time range of 7:30am-4:30pm, M-F is entered. At the bottom right, there are 'Cancel' and 'Assign' buttons.

5. Click **Assign** and **Save**.

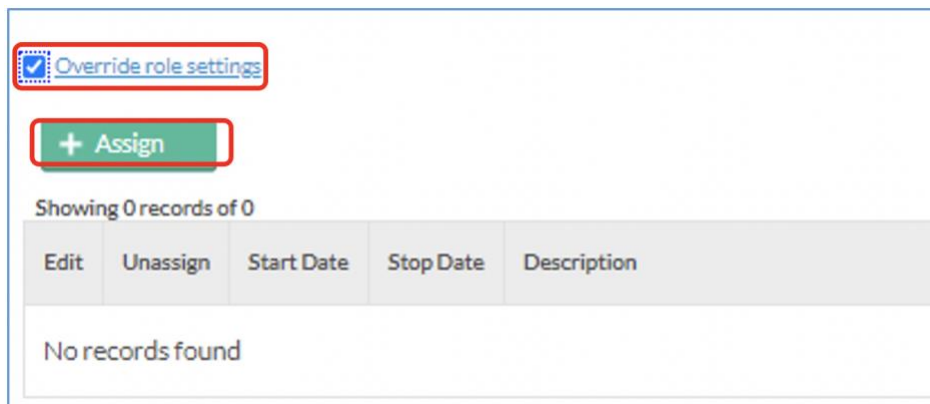
### Configuring an Employee's Automatic Meal Deduction

1. Select **Employee**.
2. Select the employee's name and the **Hours** tab



The 'EMPLOYEE PROFILES' page shows a search bar and a 'Hours' tab selected. Below the search bar, it says 'Showing 11 records of 11'. A table lists employees, with the first row showing '4545', 'C1employee C1emp', and 'C1employee C1employee'. The 'Hours' tab is highlighted with a red box.

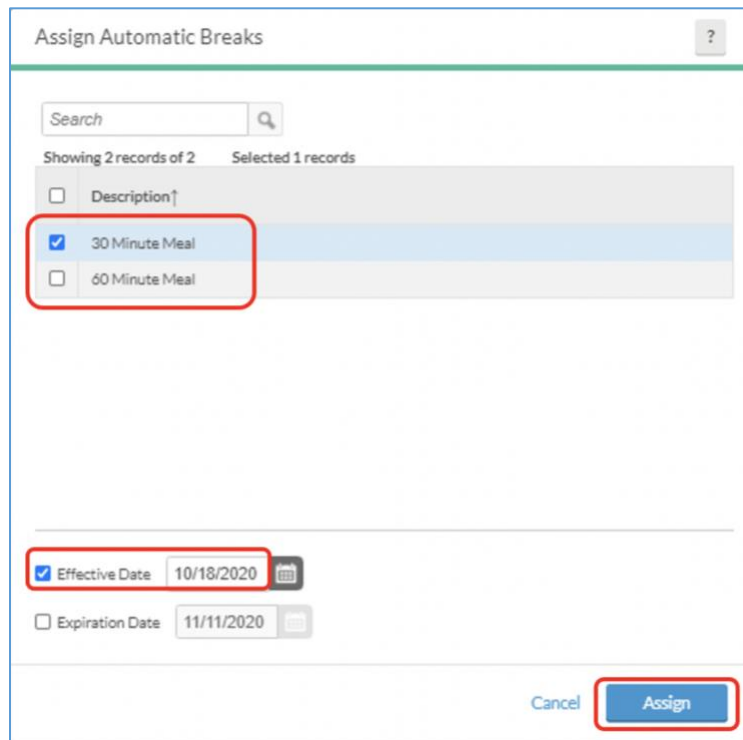
3. Click **Override role settings** and the **Assign** button



The 'Override role settings' page shows a checkbox for 'Override role settings' which is checked. Below it is a green '+ Assign' button. A table below shows 'Showing 0 records of 0' with columns: Edit, Unassign, Start Date, Stop Date, and Description. The table is empty, and a message 'No records found' is displayed.



4. In the **Assign Automatic Breaks** window, choose either one of the radio buttons and enter the **Effective Date**.



The 'Assign Automatic Breaks' window features a search bar at the top. Below it, a table displays two records: '30 Minute Meal' and '60 Minute Meal'. The '30 Minute Meal' record is selected, indicated by a blue highlight and a checked checkbox. At the bottom, there are two date fields: 'Effective Date' (set to 10/18/2020) and 'Expiration Date' (set to 11/11/2020). Both date fields have checkboxes next to them, with the 'Effective Date' checkbox being checked. A red box highlights the 'Effective Date' field and its checkbox. At the bottom right, there are 'Cancel' and 'Assign' buttons, with the 'Assign' button highlighted by a red box.

Description
<input checked="" type="checkbox"/> 30 Minute Meal
<input type="checkbox"/> 60 Minute Meal

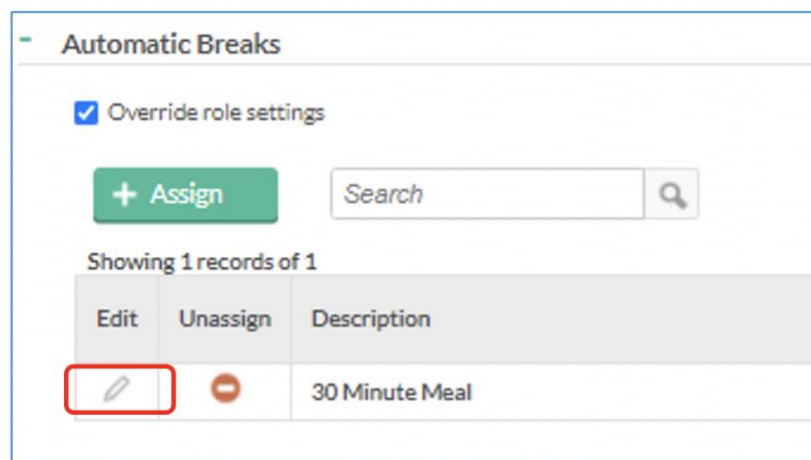
☒ Effective Date 10/18/2020 ☐ Expiration Date 11/11/2020

Cancel Assign

5. Click **Assign** and **Save**.

### Ending an Employee's Automatic Meal Deduction

1. Select **Employee**.
2. Select the employee's name and the **Hours** tab
3. Click on the pencil icon that is in the **Edit** column to the left of the schedule that you would like to end.



The 'Automatic Breaks' window shows a table with one record: '30 Minute Meal'. The table has columns for 'Edit', 'Unassign', and 'Description'. The 'Edit' column contains a pencil icon, which is highlighted by a red box. The 'Unassign' column contains a minus sign icon. The 'Description' column contains the text '30 Minute Meal'. Above the table, there is a green '+ Assign' button and a search bar. A checkbox labeled 'Override role settings' is checked.

☒ Override role settings

+ Assign Search

Showing 1 records of 1

Edit	Unassign	Description
		30 Minute Meal

4. In the **Configure Automatic Break** window, enter the date on which you would like the automatic deduction to end, in the **Expiration Date** box.

Configure Automatic Break

☒ Effective Date 10/18/2020

☒ Expiration Date 10/31/2020

Cancel Save

5. Click **Save** and **Save** again.

## Timecards

Timecards show the time for which an employee is to be paid, including both clocked hours and leave time. They show the daily detail, and a summary of time for each employee for the time period selected.

In the timecard example below, the period summary (upper right corner) shows that the individual has 40 hours at the regular rate of pay, 16 of which are leave time. When reviewing each timecard, it will need to be determined if any punches are missing, or if the daily and total hours are correct.

+ Add

Manage

Exceptions

Processing

Resolve Period

Break

Show absences

Regular

40:00

OT1

0:00

OT2

0:00

Comp Time

0:00

Leave

16:00

Total

40:00

Showing 5 records of 5

Selected 0 records

					Notes	Edited		Break Length	Time In	Time Out	Hours	Shift Total	Week Total	Job Code			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		60u	11/2/2020 08:00 AM	11/2/2020 05:00 PM	8:00	8:00		9968790000 - 99687900-Controller-AccoPaysCI			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y			11/3/2020 08:00 AM	<< Time sheet >>	8:00	8:00		170 - Vacation Pay			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		60u	11/4/2020 08:00 AM	11/4/2020 05:00 PM	8:00	8:00		9968790000 - 99687900-Controller-AccoPaysCI			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		60u	11/5/2020 08:00 AM	11/5/2020 05:00 PM	8:00	8:00		9968790000 - 99687900-Controller-AccoPaysCI			
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y			11/6/2020 08:00 AM	<< Time sheet >>	8:00	8:00	40:00	180 - Sick Leave			

## Accessing Timecards

1. To view timecards select **Hours > Individual Hours**.
2. View each employee's timecard by clicking on the names on the left side of the page.

## Update Hours Settings (Recommended)

The first time visiting the **Individual Hours** page, it is recommended that the following changes are made in the settings.

1. Select **Options**.

[Home](#) [HOURS](#) [SCHEDULES](#) [EMPLOYEE](#) [REPORTS](#) [TOOLS](#) [CONFIGURATION](#)

[Individual Hours](#) [Group Hours](#)

### GROUP HOURS

[Options](#) [Download](#) [?](#)

Sort by: ID ↑

9/6/2020

to

11/14/2020

Open Weeks

Update

Employee Filter

Job Code Filter

Exception Filter

☐ Show absences

In order to increase performance and enhance the functionality of our software, Group Add Hours has been made part of a new feature Mass Hours. To add or edit hours for multiple employees and multiple segments use Mass Hours.

2. In the **Default Period** box, choose **Last Week**.

Options

Display

Date format: Company Default

Time format: Company Default

Hour format: Company Default

Default Period: Last Week

3. Check the boxes next to **Display actual punch times in addition to rounded times** and **Include Period Summary**.

Worked Hours

☒ Highlight segments that contain breaks

☒ Display actual punch times in addition to rounded times

☐ Always display actual times

☒ Ask for confirmation when deleting a segment

☒ Include Period Summary

☐ Combine rates and shift premiums in the list

☒ Display job code description in the list

☐ Display total hours for each day

☐ Display day of week for each time in/out

☐ Display manager next to employee name (Group Hours Only)

☐ Show the user ID of the user that granted approval

4. Select **Apply**. These settings will remain until you make any changes to them.

## Approving a Timecard

If the total and daily hours on a timecard are correct, it may be approved by the following steps:

1. Put a check in the **Select All** box on the left. This will enter checkmarks in each day's box.

Select All	02695	+ Add		Notes	Edited	Break length	Time in	Actual time in	Time out	Actual time out	Hours	Shift tot
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Y	60u	11/2/2020 08:00 AM		11/2/2020 05:00 PM		8:00	8:00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Y	60u	11/3/2020 08:00 AM		<< Time sheet >>		8:00	8:00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Y	60u	11/4/2020 08:00 AM		11/4/2020 05:00 PM		8:00	8:00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Y	60u	11/5/2020 08:00 AM		11/5/2020 05:00 PM		8:00	8:00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Y		11/6/2020 08:00 AM		<< Time sheet >>		8:00	8:00

2. Click the **Exceptions** button and then the **Approve** radio button next to Manager. Then click **Apply** in order to approve the timecard.

The screenshot shows a web application interface for managing timecards. At the top, there are three tabs: "Manage", "Exceptions", and "Resolve Period". The "Exceptions" tab is currently active. Below the tabs, there is a section titled "Showing 16 records". A modal window is open over this section, titled "Exceptions". The modal has two columns of radio buttons: "Unapprove" and "Approve". The "Approve" column has three radio buttons, with the first one (next to "Manager") selected. Below the radio buttons is an "Apply" button. The background shows a table with columns: "Notes", "Edited", "Break length", "Time in", and "Actual time". The table contains five rows of data, each representing a day from 11/2/2020 to 11/6/2020. Each row has a "Break length" of 60u and a "Time in" of 08:00 AM.

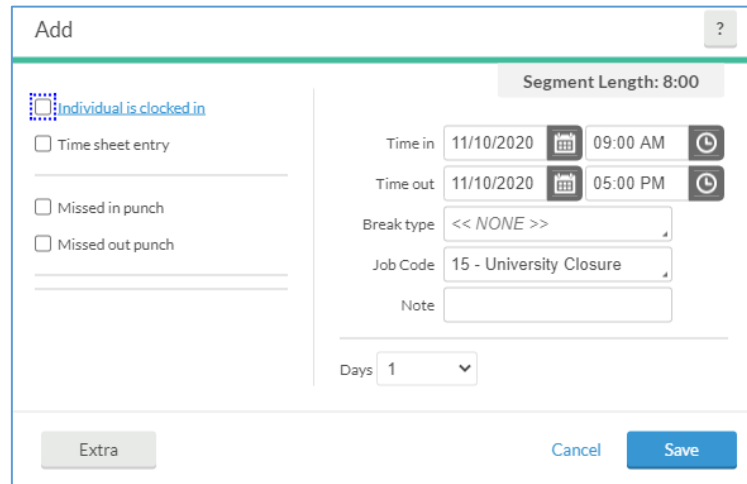
Notes	Edited	Break length	Time in	Actual time
	Y	60u	11/2/2020 08:00 AM	
	Y		11/3/2020 08:00 AM	
	Y	60u	11/4/2020 08:00 AM	
	Y	60u	11/5/2020 08:00 AM	
	Y		11/6/2020 08:00 AM	

## Missing Punches and Non-Clockable Hours

Incomplete or incorrect timecard hours are considered to be exceptions. When an exception occurs, it will need to be resolved it before the timecard can be approved.

### To Add a Missed In Punch (for an employee who has not yet clocked out)

1. Select **Hours > Individual Hours** and select an employee from the list on the left.
2. Navigate to the correct **Period** ("This Week") and click **Update**.
3. Select the **Add** button. In the **Add** window:
  - a. Select the **Individual is clocked in** check box.
  - b. Enter the date and time next to **Time in**. (Note: times should be rounded to the nearest quarter hour.)
  - c. In the **Job Code** drop down, scroll down to the bottom of the list and select the position/job description that starts with a "9" (usually the last entry in the list.)
  - d. Add a note in the **Note** box (optional.)
  - e. Click **Save**.



### To Add a Missed In or Out Punch (for an employee who has clocked out)

1. Select **Hours > Individual Hours** and select an employee from the list on the left.
2. Navigate to the correct **Period** (usually "Last Week" or "This Week") and click **Update**.
3. Double-click on the entry in either the **Time in** or **Time out** for the day with the missing punch. This will open a pop-up box.
4. In the **Edit Segment** window:
  - a. **Uncheck** the **Individual is clocked in** box.
  - b. Enter the date and time next to the missing **Time in/Time out**.
  - c. Make certain that the **Job Code** has the position/job description that starts with the number "9" (usually the last entry in the list.)
  - d. Add a note in the **Note** box (optional.)
  - e. Click **Save**.

### To Add a Full Day's Time:

1. Select **Hours > Individual Hours** and select an employee from the list on the left.
2. Navigate to the correct **Period** (usually "Last Week" or "This Week") and click **Update**.
3. Select the **Add** button. In the **Add** window:
  - a. Enter the date and time next to **Time in** and **Time out**.
  - b. In the **Job Code** drop down, scroll down to the bottom of the list and select the position/job description that starts with a "9" (usually the last entry in the list.)
  - c. Add a note in the **Note** box (optional.)
  - d. Click **Save**.

### To Add Non-Clockable Hours (e.g., University Business, Sick, Vacation, etc.):

1. Select **Hours > Individual Hours** and select an employee from the list on the left.
2. Navigate to the correct **Period** (usually "Last Week" or "This Week") and click **Update**.
3. Select the **Add** button. In the **Add** window:
  - a. Click on the **Time sheet entry** check box.
  - b. Enter the date and time next to **Time in**.
  - c. Enter the number of hours being added.
  - d. In the **Job Code** drop down, choose the appropriate code.
  - e. Add a note in the **Note** box. (Notes are required whenever the University Business job code is used. They are optional for all other job codes.)
  - f. If adding leave for more than one day, select the number of days.
  - g. Click **Save**.

### Removing an Automatic Meal Deduction

1. Select **Hours > Individual Hours** and select an employee from the list on the left.
2. Navigate to the correct **Period** (usually "Last Week" or "This Week") and click **Update**.
3. In the **Break Length** column, double-click the entry that you would like to remove.

Showing 2 records of 2												
Select					Notes	Edited		Break Length	Time In	Time Out	Hours	Shift Total
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		30u	11/2/2020 08:00 AM	11/2/2020 04:30 PM	8:00	8:00

4. In the **Edit Segment** window, click the **Extra** button.

- In the **Extra Information** window, add a checkmark next to **Disable automatic deduction for this segment** and click **Save**, and **Save** again.

**Extra Information**

**Punch in information**  
 Application TimeClock Manager - Manage Hours Individual  
 Location 131.123.18.100  
 Description N/A

**Punch out information**  
 Application TimeClock Manager - Manage Hours Individual  
 Location 131.123.18.100  
 Description N/A

**Overtime**  
☒ Do not force overtime  
☐ Force overtime 1  
☐ Force overtime 2

**Comp Time**  
☒ Disable comp time on qualifying segments  
☐ Allow comp time on qualifying segments  
☐ Force comp time on segment

**Calculations**  
☒ **Disable automatic deduction for this segment**  
☐ Disable segment minimum

Cancel **Save**

## Moving Overtime to Comp Time Earned

### Moving an Individual Segment

- Select **Hours > Individual Hours** and select an employee from the list on the left.
- Navigate to the correct **Period** (usually “Last Week” or “This Week”) and click **Update**.
- Double-click on the segment to be changed between overtime and comp time earned.

Showing 5 records of 5      Selected 1 records

					Notes	Edited		Break Length	Time In	Time Out	Hours	Shift Total	Week Total
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y			11/2/2020 08:00 AM	11/2/2020 04:30 PM	8:30	8:30	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		30u	11/3/2020 08:00 AM	11/3/2020 06:00 PM	9:30	9:30	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		30u	11/4/2020 08:00 AM	11/4/2020 04:30 PM	8:00	8:00	
<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		30u	11/5/2020 08:00 AM	11/5/2020 04:30 PM	8:00	8:00	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		30u	11/6/2020 08:00 AM	11/6/2020 04:30 PM	8:00	8:00	42:00

- In the **Edit Segment** window, click the **Extra** button.



5. In the **Extra Information** window, select **Allow Comp Time on Qualifying Segments**.

Extra Information

Punch in information  
Application: TimeClock Manager - Manage Hours Individual  
Location: 131.123.17.208  
Description: N/A

Punch out information  
Application: TimeClock Manager - Manage Hours Individual  
Location: 131.123.17.208  
Description: N/A

Overtime  
☒ Do not force overtime  
☐ Force overtime 1  
☐ Force overtime 2

Comp Time  
☐ Disable comp time on qualifying segments  
☒ Allow comp time on qualifying segments  
☐ Force comp time on segment

Calculations  
☐ Disable automatic deduction for this segment  
☐ Disable segment minimum

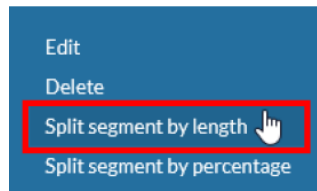
Cancel Save

6. Click Save on the **Extra Information** and **Edit Segment** windows.

### Splitting an Individual Segment









When an employee wants to split a segment's time between overtime and comp time, the segment must be split.

1. Select **Hours > Individual Hours** and select an employee from the list on the left.
2. Navigate to the correct **Period** (usually "Last Week" or "This Week") and click **Update**.
3. Right click the segment and choose **Split segment by length**.



4. Split the segment by clicking the icon in the **Split** column. Additional segments will appear as the icon is clicked. The shift can be split as many times as needed.

- After splitting the segment, specify a segment length in the **Length** column, or a time for the segment change in each respective field in the **Time** column.

Split	Delete	Length	Time
		<input type="text" value="04:30"/>	In <input type="text" value="08:15 AM"/>  Out <input type="text" value="12:45 PM"/> 
		<input type="text" value="04:15"/>	In <input type="text" value="12:45 PM"/>  Out <input type="text" value="05:00 PM"/> 

- Click **Save** to commit to the changes.
- Each segment can be left as overtime or moved to comp time earned as needed.

## Viewing and Managing Exceptions:

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

The **Exception Filter** allows supervisors to filter segments based on the exceptions flagged on employee shifts. For example, if you are required to approve all missed punches before payroll is to be processed, you can filter all of 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.

### To Access Exceptions:

1. Select **Hours > Group Hours**.
2. Click the **Exception Filter** button. In the **Exception Filter** window:
  - a. By clicking the **Required for close week** checkbox, the exceptions that are required to be resolved for timecard completion will be chosen.
  - b. You may also choose any individual exceptions that are listed
  - c. Click **Filter**.

Exception Filter

☒ Required for close week

☐ Required for payroll exports and reports

Search

Showing 28 records of 28 Selected 0 records

Exception	Category
<input type="checkbox"/> Employee Approval	Approvals
<input type="checkbox"/> Manager Approval	Approvals
<input type="checkbox"/> Other Approval	Approvals
<input type="checkbox"/> Conflicting Shifts	Shift
<input type="checkbox"/> Comp Time Overtime	Shift
<input type="checkbox"/> Comp Time Regular	Shift

NOTE: Only segments with the selected exceptions will be shown

Restore default Save as default Cancel Filter

3. Next, set the **Period** to the week that you would like to view and click **Update**. The applicable exceptions will load.

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																	
					Y			11	Fri 9/16/2016 6:00 PM	Fri 9/16/2016 8:00 PM	2.00			300 - Daytime		0.00 + 0.00	
					Y			12	Fri 9/16/2016 8:00 PM	Fri 9/16/2016 10:00 PM	2.00			350 - Nighttime		0.00 + 0.00	
					Y			1	Fri 9/16/2016 10:00 PM	Sat 9/17/2016 12:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
					Y			2	Sat 9/17/2016 12:00 AM	Sat 9/17/2016 2:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
					Y			3	Sat 9/17/2016 2:00 AM	Sat 9/17/2016 4:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
					Y			4	Sat 9/17/2016 4:00 AM	Sat 9/17/2016 6:00 AM	2.00			350 - Nighttime		0.00 + 0.00	
					Y			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	
					Y			3	Mon 9/12/2016 8:00 PM	Mon 9/12/2016 10:00 PM	2.00			300 - Daytime		0.00 + 0.00	

- Exceptions can be displayed by hovering over a blue or red dot next to each segment. Those that require approval will be listed under the 'Requires Approval' section.
- 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.

## Reviewing Time-Off Requests:

Request Manager allows users to view, add, edit, approve, and deny employee time off requests. Time-off requests can be submitted by the individual or created by the user in any leave code(s) that the employee may have access to.

### Viewing Requests Submitted:

Log into TimeClock Manager

1. Click on **Tools > Request Manager**
2. By default, employee requests will be visible in a **Calendar** view. In order to view employee requests in a sortable list, select the **List** tab.

REQUEST MANAGER ☆

Options ? Feedback

Calendar List

Status Sub assignment FMLA Employee Filter Job Code Filter

Requests per calendar day: 10 Apply

+ Add Manage

<< October 2016 >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

Calendar details:

- 17: Pending (1) ANDREW KELLY 8:00 AM-6:00 1001 - VACATION
- 18: Pending (1) JESSICA HOWARD 10:00 AM-6:00 1000 - SICK
- 19: Denied (1) ANDREW KELLY 8:00 AM-6:00 1001 - VACATION
- 24: Approved (1) SIMON BLAKE 8:00 AM-6:00 1000 - SICK

3. To view detailed information on a request submitted and how its approval will be handled, right-click and select **Detail**.

Employee Request Detail ? Feedback

Expand all Collapse all

Information

Employee: JESSICA HOWARD Days: 1/1  
Hire date: 10/18/2016 (10:00 AM 6:00) Edit  
Date submitted: 10/19/2016 Leave code: 1000 - SICK  
Entered by: ADMIN Hours: 6.00  
Accrual Bank: 100-Sick View Accruals

+ Approvals

+ Notes

+ Options

Cancel Save

## Managing Time-Off Requests:

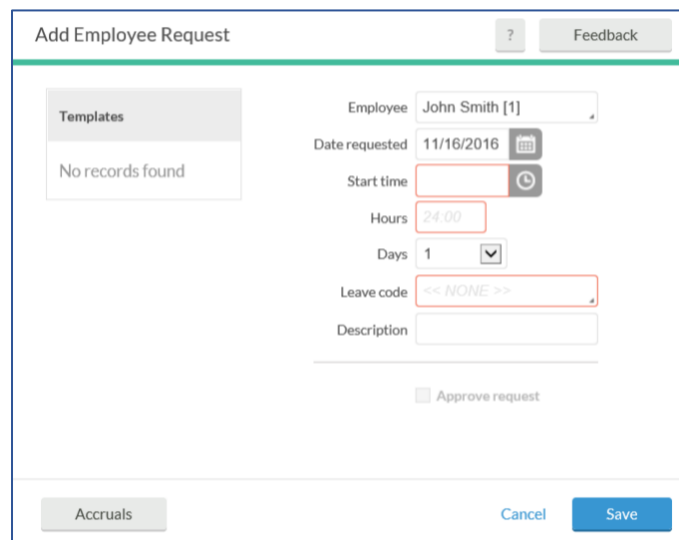
Request Manager allows the user to view and approve any time-off requests that have been submitted by employees. Additionally, employee time-off requests can be manually added through this feature.

### Adding Requests for Employees:

While employees can create their own request segments, users are also able to create request segments for employees assigned to them.

Log into TimeClock Manager to create a request segment:

1. Browse to **Tools > Request Manager**
2. Click on the **Add** button on the information bar or select the plus sign in Calendar view on an appropriate day.



The screenshot shows the 'Add Employee Request' form. On the left, there is a 'Templates' section with a message 'No records found'. The main form area contains the following fields: 'Employee' (a dropdown menu showing 'John Smith [1]'), 'Date requested' (a date picker showing '11/16/2016'), 'Start time' (a time picker), 'Hours' (a text input field with '24.00'), 'Days' (a dropdown menu showing '1'), 'Leave code' (a dropdown menu showing '<< NONE >>'), and 'Description' (a text input field). Below these fields is a checkbox labeled 'Approve request'. At the bottom of the form, there are three buttons: 'Accruals', 'Cancel', and 'Save'.

3. Select the employee for whom you would like to create a time-off request for from the **Employee** dropdown.
4. Select the **date** for the request.
5. Select the **Start time**, which will be the anchor point for the leave time sheet.
6. Enter in the length of the leave request in the **Hours** field.
7. Use the **Days** dropdown to enter the request for multiple consecutive days.
8. Select a **Leave Code** for this time-off request from the drop-down menu.
9. Enter in a **description** for this leave request.
10. Click **Save** to add this request.

## Editing Requests Submitted by Employees

Managers are able to edit the details of pending requests. This allows users to change the date range, leave code, or other aspects of the request before it is approved.

Log into TimeClock Manager to edit a request:

1. Browse to **Tools > Request Manager**.
2. Select the request from either **Calendar** or **List** view, then select **Detail** by right-clicking on the segment or selecting it through the **Manage** dropdown button.

The screenshot displays the 'Employee Request Detail' form. At the top, there is a title bar with a help icon (?) and a 'Feedback' button. Below the title bar, there are links for 'Expand all' and 'Collapse all'. The main content area is divided into sections: 'Information', 'Approvals', 'Notes', and 'Options'. The 'Information' section contains a table with the following data:

Employee	JESSICA HOWARD	Days	1/1
Hire date		Date requested	10/18/2016 (10:00 AM 6.00)
Date submitted	10/19/2016	Leave code	1000 - SICK
Entered by	ADMIN	Hours	6.00
		Accrual Bank	100-Sick

Below the table, there is a 'View Accruals' button. To the right of the table, there is an 'Edit' button, which is highlighted with a red box. At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

3. On the **Employee Request Detail** window, you will be able to see information regarding the request as well as its approval status and description. To change the date, time, or job code, click the **Edit** button.

The screenshot shows the 'Edit Employee Request' window. It features a title bar with a help icon and a 'Feedback' button. The left sidebar contains a 'Templates' section with a 'No records found' message. The main content area includes the following fields:

- Employee: John Smith [1]
- Date requested: 11/14/2016 (with a calendar icon)
- Start time: 08:00 AM (with a clock icon)
- Hours: 8:00
- Leave code: 200 - Vacation
- Description: (empty text box)

At the bottom of the window, there is an 'Accruals' button on the left, and 'Cancel' and 'Ok' buttons on the right.

4. Make any changes in the **Edit Employee Request** screen and Select **Ok**.
5. A note can be entered about the request in the **Manager Note** section. This allows users to keep track of reasons for individual requests.
6. Click **Save** to commit these changes to the request segment.

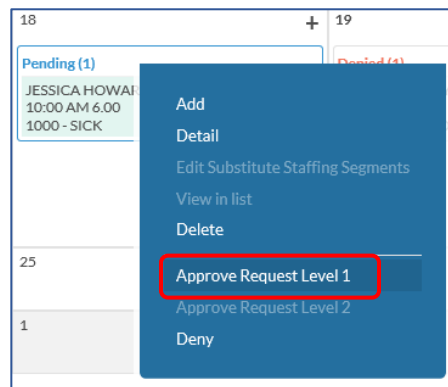


## Approving/ Denying Time-Off Requests

Once a requested time-off segment has been entered by either the employee or the manager, a user with proper permissions can approve or deny the request. Approving or denying a segment also removes the ability to edit that request.

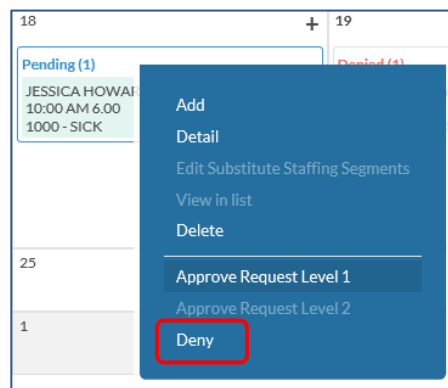
Approving a Time-Off Request:

1. Select the request entered from either **Calendar** or **List** view.
2. Right-click on the segment or select the **Manage** dropdown.
3. Select the level of approval you would like to grant.
4. Once approved, the segment will be marked as **Approved** and automatically to the employee timecard.



Denying Time-Off Requests

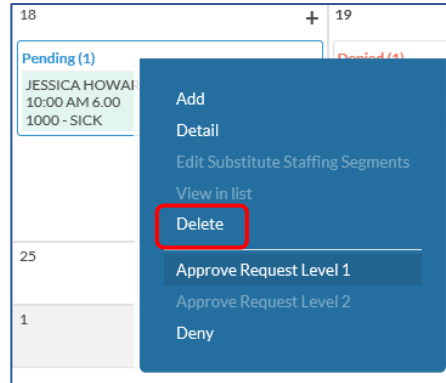
1. Select the request entered from either **Calendar** or **List** view.
2. Right click on the segment or select the **Manage** dropdown.
3. Select **Deny** from the list to mark the segment as denied and prevent further editing.



## Deleting Time-Off Requests

Requests can also be deleted if they have been entered in error. Deleting a request will completely remove it from the system.

1. Right-click on the segment or select the **Manage** dropdown
2. Click **Delete**
3. On the confirmation screen, click **Ok** to permanently delete the request.



## Employee Accrual Balances:

Accruals are used within TimeClock Plus to maintain a balance of time that an employee earns, typically for any type of leave (Example: vacation, sick, or comp time.)

If accruals are being tracked in TimeClock Plus, it is recommended to review the Employee Accrual Balance before approving a Time-Off Request.

### Viewing Employees' Accrual Balance

Log into TimeClock Manager to edit a request:

1. Browse to **Tools > Request Manager**
2. Select the request from either **Calendar** or **List** view, then select **Detail** by right-clicking on the segment or selecting it through the **Manage** dropdown button.

The screenshot shows the 'Employee Request Detail' window. At the top, there's a title bar with a question mark icon and a 'Feedback' button. Below the title bar, there are two tabs: 'Information' (selected) and 'Edit'. The 'Information' tab displays the following details:

Employee: John Smith	Days: 1/1
Hire date	Date requested: 11/14/2016 (08:00 AM 8:00)
Date submitted: 11/04/2016	Leave code: 200 - Vacation
Entered by: ADMIN	Hours: 8:00
	Accrual Bank: 2-Vacation

Below the table, there are three expandable sections: 'Approvals', 'Notes', and 'Options'. At the bottom right, there are 'Cancel' and 'Save' buttons. A red box highlights the 'View Accruals' button located next to the 'Accrual Bank' field.

3. In the **Employee Request Detail** window, you will be able to see information regarding the accrual bank that is assigned to the request.
4. To view more information regarding the hours the employee has available select **View Accruals**.

Manage Accruals (Vacation - 2)

?

Feedback

☒ View entire history
 ☐ View selected period

1/1/2016

to

11/4/2016

Year To Date

Update

Download

Accrued 80.0000

Used 12.0000

Remaining 68.0000

Date Posted	Accrued	Used	Excess	Carry Over	Adjustment	Imported	Manual	Rule ID	Rule Name	Notes
05/21/2016	80.0000	12.0000	0.0000		X	X	✓			

Cancel

Ok

- Review the accruals to confirm that the employee has enough time accrued.
- Select **OK** to continue. If the Time-Off Request needs to be edited, follow the steps in the section “Editing Requests Submitted by Employees”.
- To approve or deny the request, follow the steps in the “Managing Time-Off Requests” section.

## Viewing Approved Leave Time:

Once a time-off request is approved for an employee by the supervisor, the leave time timesheet gets automatically added to the employee's hours.

In order to confirm that the leave hours were added to the employee, follow the steps below.

1. Click on **Hours > Individual Hours**
2. Select the employee to review the hours
3. Set your date range to include the date the request was submitted and click **Update**.
4. The leave time entry will appear on the applicable day.

Showing 5 records of 5      Selected 0 records															
<input type="checkbox"/>					Notes	Edited		Time In	Time Out	Hours	Shift Total	Week Total	Job Code	Rate	Substitute For
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		11/14/2016 08:00 AM	<< Time sheet >>	8:00	8:00		200 - Vacation	0.00	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		11/15/2016 09:00 AM	11/15/2016 05:00 PM	8:00	8:00		1 - Tech	0.00	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		11/16/2016 09:00 AM	11/16/2016 05:00 PM	8:00	8:00		1 - Tech	0.00	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		11/17/2016 09:00 AM	11/17/2016 05:00 PM	8:00	8:00		1 - Tech	0.00	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		11/18/2016 09:00 AM	11/18/2016 05:00 PM	8:00	8:00	40:00	1 - Tech	0.00	

## User Delegation

By adding a user delegate, a supervisor can give another supervisor the ability to manage their employees' timecards. To add a delegate:

1. Select **Configuration > User Delegation**
2. Select the **Add** button
3. In the **Add User Delegation** window:
  - a. Enter your Kent ID in the **Delegated From** field.
  - b. Enter the Kent ID of the person to whom you want to delegate in the **Delegate To** field.
  - c. Enter the **Start date**.
  - d. Enter the **Stop date**.
  - e. Click **Save**.

The screenshot shows the 'Add User Delegation' window. The 'Delegated From' field is set to 'EHERMON' and the 'Delegated To' field is set to 'PGROVE'. The 'Start date' and 'Stop date' are both set to '11/12/2020'. Under the 'Permissions/Access To Delegate' section, the following permissions are selected:

- ☒ User Permissions
- ☒ Employee Access
- ☒ Job Code Access

At the bottom right, there are 'Cancel' and 'Save' buttons.