

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”

MY DASHBOARD ☆ Matching 12 of 12 Employees Refresh Edit ? Feedback

REQUIRED APPROVALS 0 MISSED PUNCHES 0 APPROACHING OVERTIME (CLOCKED IN) 0

BIRTHDAYS 1/1

PENDING TIME OFF REQUESTS 1

Name	Date	Request	1/1
Justin Ferguson	07/13/2017	Vacation - 08:00 AM to 04:00 PM	✓ ✕

[Jump to Request Manager](#)

ANNIVERSARIES 0

Approve by clicking ✓
Deny by clicking ✕

Done!

From the calendar view:

Click the link to “Jump to Request Manager”

MY DASHBOARD ☆ Matching 12 of 12

REQUIRED APPROVALS 0 MISSED PUNCHES 0

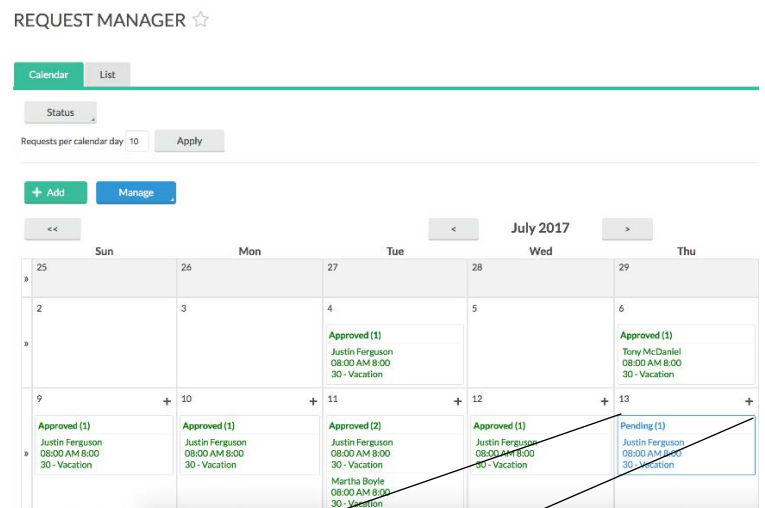
BIRTHDAYS 1/1

PENDING TIME OFF REQUESTS 1

Name	Date	Request	1/1
Justin Ferguson	07/13/2017	Vacation - 08:00 AM to 04:00 PM	✓ ✕

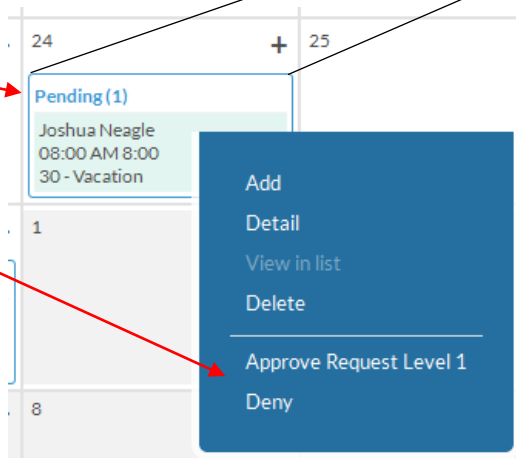
[Jump to Request Manager](#)

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.

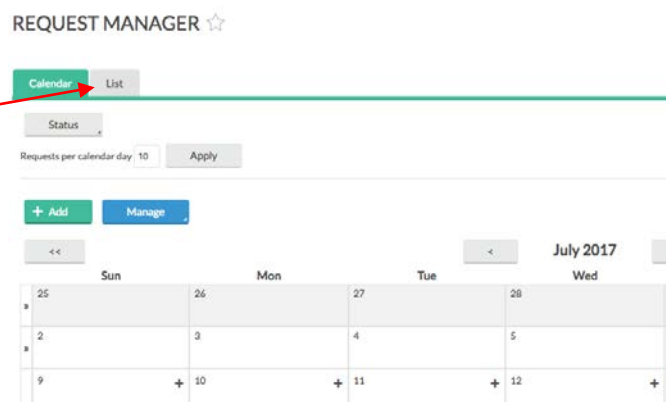


Done!

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 of the dropdown, there is a date field showing '017', a calendar icon, and a field labeled 'Open Weeks'. An 'Update' button is visible on the right.

REQUEST MANAGER ☆

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

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. The 'Group by' dropdown is set to 'Request Date'. The date range is set to '7/9/2017' to '7/22/2017'. The 'Open Weeks' field is visible. An 'Update' button is on the right. Below the date range, there are buttons for '+ Add', 'Manage', 'Expand all', and 'Collapse all'. The interface shows 'Showing 1 records of 1' and 'Selected 0 records'. A table with columns 'ID', 'Name', 'Date Submitted', 'Notice Days', 'Request Date', and 'Time' is displayed. The first row shows a request for '07/11/2017' (1 of 1 requests).

REQUEST MANAGER ☆

Select Manage

Select Approve or Deny

Done!

The screenshot shows the REQUEST MANAGER interface with the 'List' tab selected. The 'Manage' dropdown menu is open, showing options: 'Add', 'Detail', 'View in calendar', 'Delete', 'Approve Request Level 1', and 'Deny'. The table below shows a request for '07/11/2017' (1 of 1 requests) with columns 'ID', 'Name', 'Date Submitted', 'Notice Days', 'Request Date', 'Time', and 'Hours'.

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:

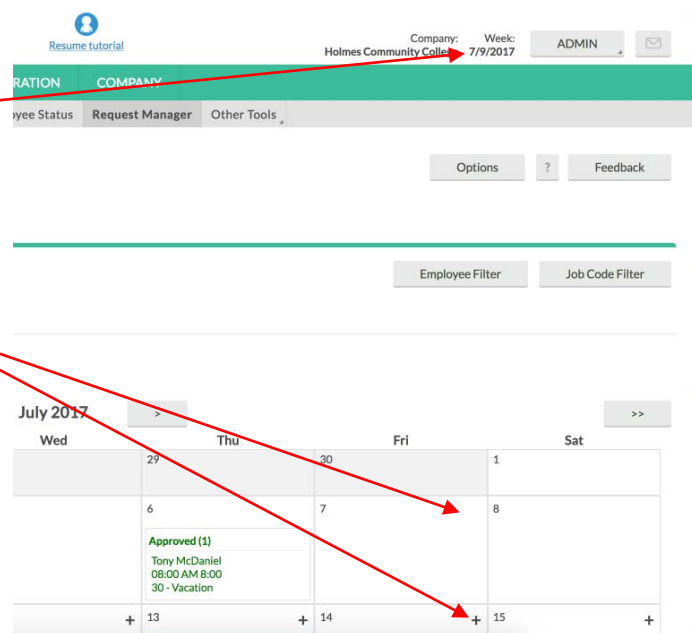
Add Leave During Open Weeks
Add Leave During Closed Weeks

The easiest and best method
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

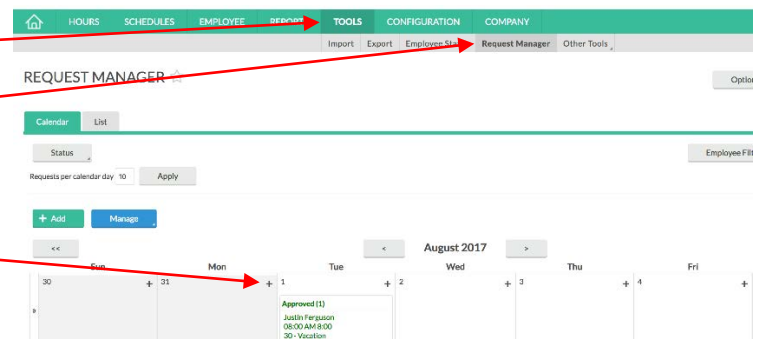


Add Leave During Open Weeks

Select “Tools”

Select “Request Manager”

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



Choose the employee first

Add Employee Request

? Feedback

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

The form contains the following fields and options:

- Templates:** A dropdown menu with options: << NONE >>, Excused Absence, Extraordinary Day, Sick Full Day 12 Mth (highlighted), Sick Half Day 12 Mth, and Vacation Full Day.
- 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:** A checkbox that is checked.

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"

The interface shows a navigation bar with the following tabs: HOURS (selected), SCHEDULES, EMPLOYEE, and REPORT. Below the HOURS tab, there are sub-tabs: Individual Hours (selected), Group Hours, Period Export, and Time Sh.

INDIVIDUAL HOURS ☆

Sort by: ID ↑

Employee Filter

Search if necessary or

Select the employee

The search results show a list of employees:

ID	Name
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

ID	Name	Ledger	Accrual Bank↑	Accrued	Accrual Forecast	Used	Used Forecast
1039	John Baker						
1421	Jesse Nichols						
1541	Tammy Collins						
2614	Kelli []		12 Mth Sick	2784.0000	0.0000	0.0000	0.0000
3005	Justin Ferguson		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)

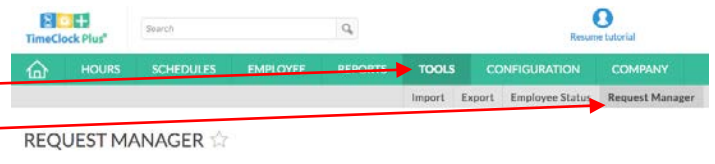
Delete from Timesheet

Delete or Confirm in Ledger

Request Manager

Select "Tools"

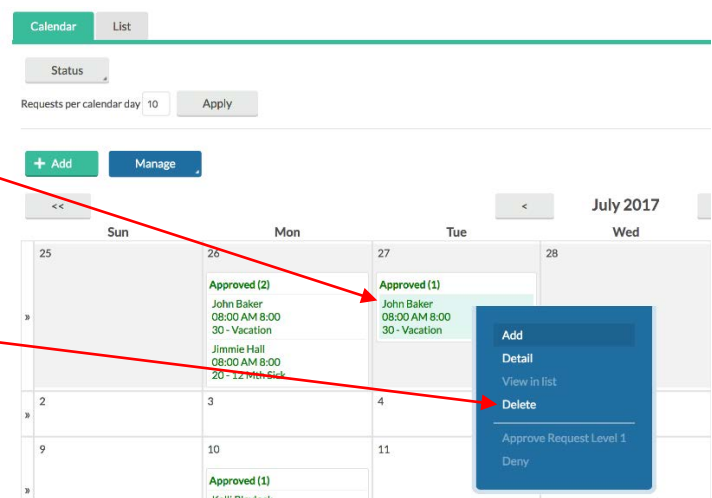
Select "Request Manager"



Locate the entry you wish to delete in the calendar

Right click

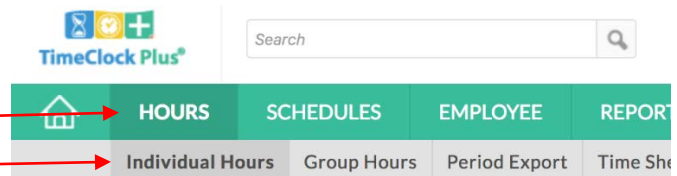
Select "Delete"



Timesheet

Select "Hours"

Select "Individual Hours"

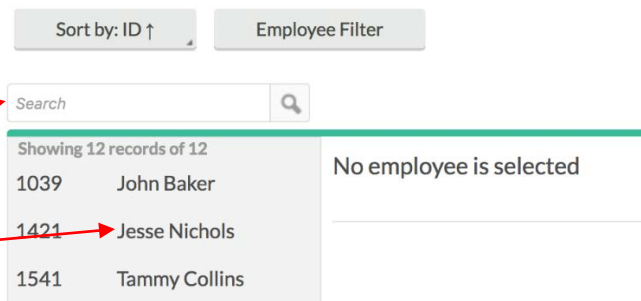


INDIVIDUAL HOURS

Search if necessary

or

Select the employee



Locate the entry that needs to be deleted.

Confirm the Job Code

Confirm the Date

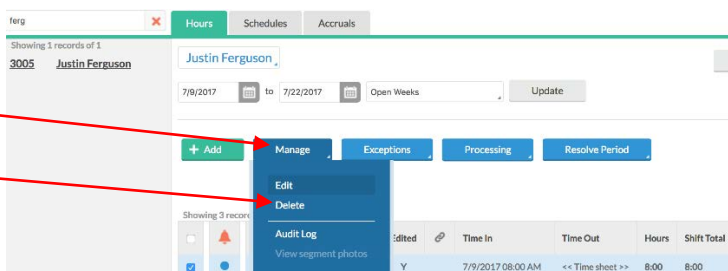
Place a check mark in the far left box



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	7/11/2017 08:00 AM	8:00	8:00	8:00	30 - Vacation
Y	7/11/2017 08:00 AM	7/11/2017 08:00 AM	1:15	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

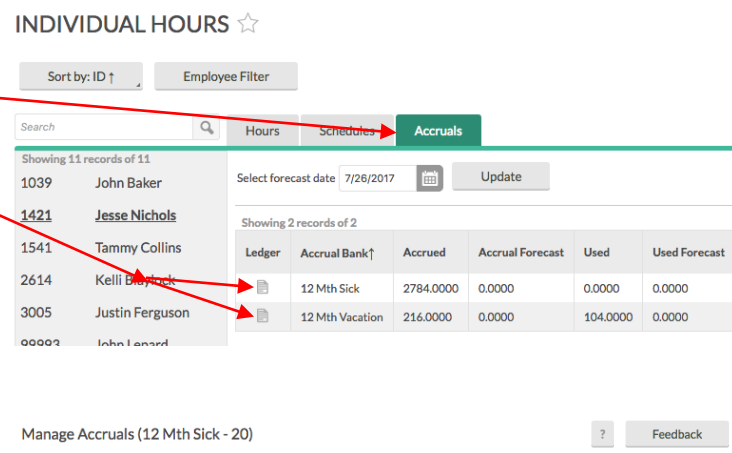
Edit Delete Audit Log View segment photos

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

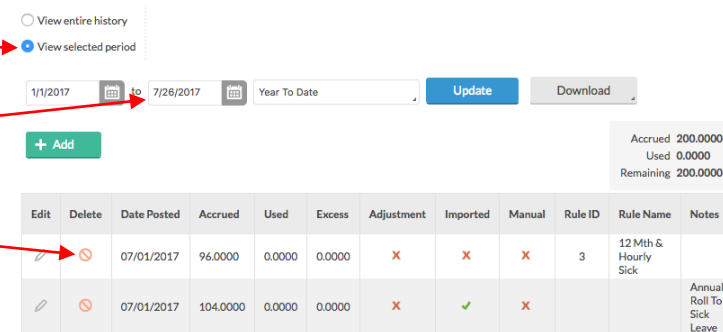
Select forecast date: 7/26/2017 Update

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.



☐ 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

Delete it by selecting the delete icon.

or

Confirm the entry doesn't exist

Select "Save"



Cancel Save

Done!

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

Select "Accruals"

Select "Review Leave Accrual, Usage, and Balances"

Select "Preview"

Or "Print"

Done!

Advanced Tips:

Filter by Employee

(Use to view a single employee)

Select "Employee ID"

"Select"

Employee Filter

Preview Save as Reset All

☒ 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

Select "Filter"

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

Employee Filter

Preview Save as Reset All

☒ 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

GROUP HOURS ☆

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

Employee Filter Job Code Filter Exception Filter Show absences

Apply Changes Discard Changes

Showing 10 records of 10

		Notes	Edited	Break Length	Time In	Time Out	Hours	Shift Total	Day Total	Week Total
-	93360 - Brandy Culpepper									
					7/31/2017 08:00 AM	7/31/2017 03:30 PM	7:30	7:30	7:30	
					8/1/2017 08:00 AM	8/1/2017 03:30 PM	6:30	6:30	6:30	
					8/2/2017 08:00 AM	8/2/2017 03:30 PM	6:30	6:30	6:30	
					8/3/2017 08:00 AM	8/3/2017 04:30 PM	7:30	7:30	7:30	28:00

Select "Apply Changes"

Done!

GROUP HOURS ☆

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

Employee Filter Job Code Filter Exception Filter Show absences

Apply Changes Discard Changes

Showing 10 records of 10

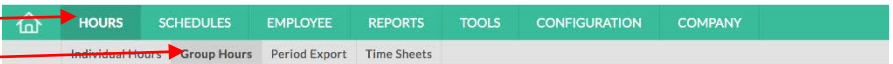
		Notes	Edited	Break Length	Time In	Time Out	Hours	Shift Total	Day Total	Week Total
-	93360 - Brandy Culpepper									
					7/31/2017 08:00 AM	7/31/2017 03:30 PM	7:30	7:30	7:30	
					8/1/2017 08:00 AM	8/1/2017 03:30 PM	6:30	6:30	6:30	
					8/2/2017 08:00 AM	8/2/2017 03:30 PM	6:30	6:30	6:30	
					8/3/2017 08:00 AM	8/3/2017 04:30 PM	7:30	7:30	7:30	28:00

Chapter 6

Edit 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

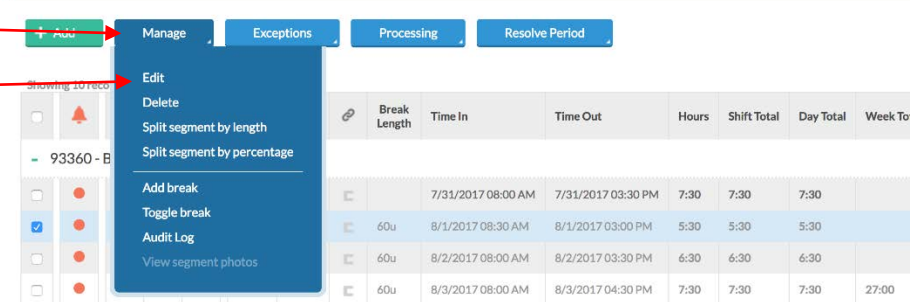
	Notes	Edited	Break Length	Time In	Time Out	Hours	Shift Total	Day Total	Week Total
- 93360 - Brandy Culpepper									
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7/31/2017 08:00 AM	7/31/2017 03:30 PM	7:30	7:30	7:30	
<input type="checkbox"/>	<input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

Employee Filter Job Code Filter Exception Filter ☐ Show absences

Select the entry that you wish to edit.

Select "Manage"

Select "Edit"



Edit Segment

? Feedback

Make the changes needed.

Save

☐ Individual is clocked in

☐ Time sheet entry

☐ Edit actual time

☐ Missed in punch

☐ Missed out punch

Segment Length: 7:30

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

Note

Custom Extra Cancel Save

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"/>				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"/>			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

Select "Manage"

Select "Delete"

Showing 10 records of 10 Selected 1 records

93360 - Brandy Culpepper

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
	7/31/2017 08:00 AM	7/31/2017 03:30 PM
60u	8/1/2017 08:00 AM	8/1/2017 03:30 PM
60u	8/2/2017 08:00 AM	8/2/2017 03:30 PM
60u	8/3/2017 08:00 AM	8/3/2017 04:30 PM

Select "OK"



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

Cancel



Done!

