December 2022

Time, Labor & Attendance

Manager / Supervisor User's Guide

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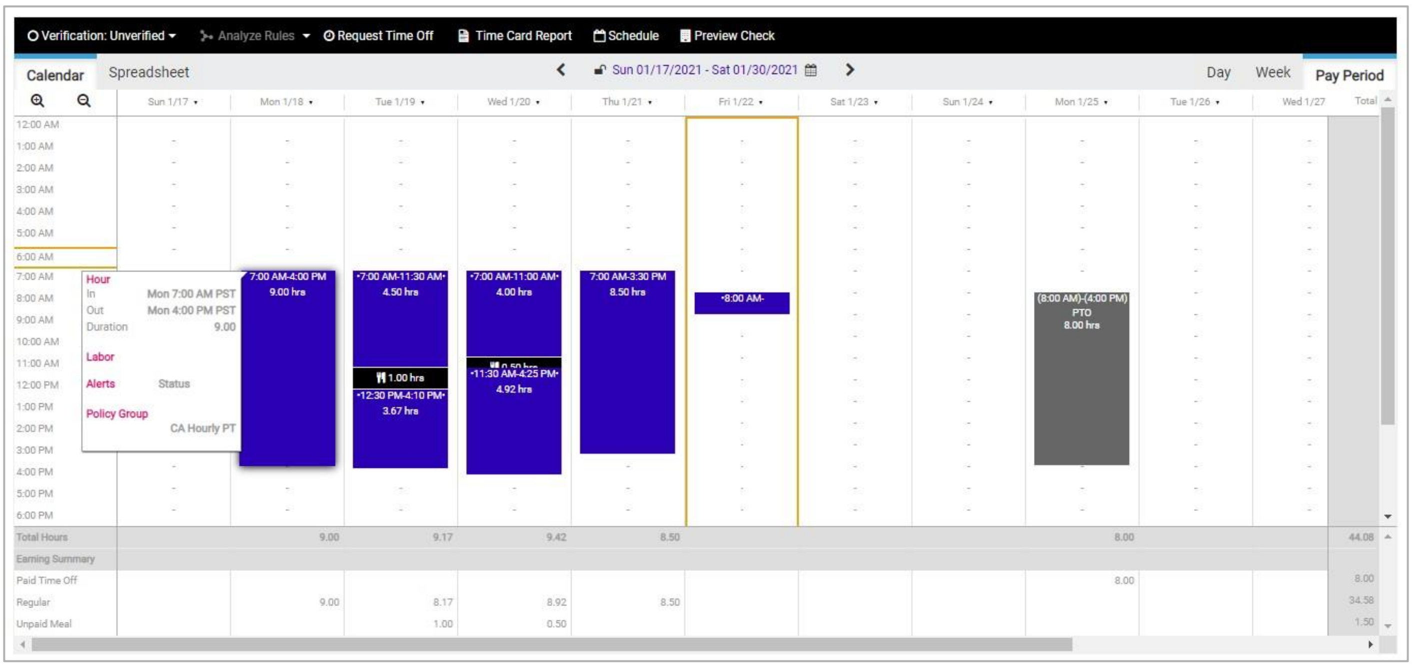
Time Card

The Time Card displays all punches, hours entered, absences and approved time off for each employee. Each client may configure the Time Card to meet their business policies. Depending on your role within the company, the Time Card may be view only or allow you to edit the details of the Time Card. For example, employees typically have read only access to the Time Card because they are using self-service punching or a time clock. Supervisors and Managers on the other hand typically have edit rights to the Time Card to correct a missing punch for an employee, or add labor information. Clients that require employees and/or managers to verify Time Cards are able to accomplish this task from here. The hours detail for the different earnings types are located at the bottom of the Time Card.



The following is a breakdown of the different areas of the Time Card and their functions:

Time Scale

The and buttons (located in the top left of the Time Card) are used to define the time scale view on the Time Card. By default, the Time Card is set up to show one-hour increments, and is adjustable down to fifteen-minute increments, which allows three views in total (Hour, Half Hour, and Quarter Hour).

Time Card Date Range

The Date Range (located at the top center of the Time Card) allows the user to change the date range being displayed on the Time Card. When the date range is clicked on, the user can specify a specific date to view on the Time Card.

Symbol

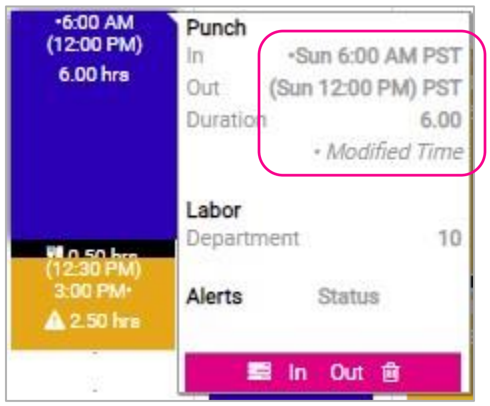
This symbol next to the date range on the Time Card, allows you to determine if the Time Card is in a locked or unlocked state. Locked means changes cannot be made, as payroll is in process or has been completed.

Time Card Views

The Time Card Views (located on the top right of the Time Card) allow the user to change the number of days being displayed on the Time Card. By default, the Time Card displays the Pay Period view, but the other options of Week and Day are available for use.

Time Card Symbols

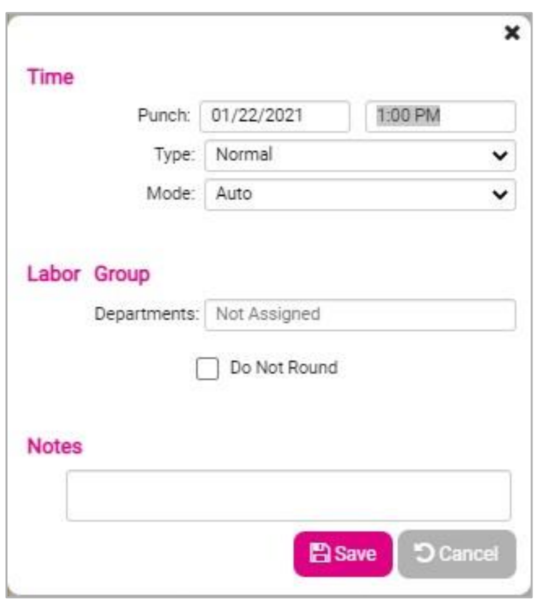
The time card displays symbols next to any punches that have been manually entered or manually adjusted. The symbol appears next to the punch edited. In the slide out window, you will be able to see the modified record.



Punch Entry

To enter a punch on the Time Card, follow the steps below:

1. Using the mouse, click on the Time Card at the time you wish to the punch. The **Punch Entry Area** appears (as shown below).
   Note: The date and time for the punch is automatically entered for you based on the Time Card area selected earlier in step 1.

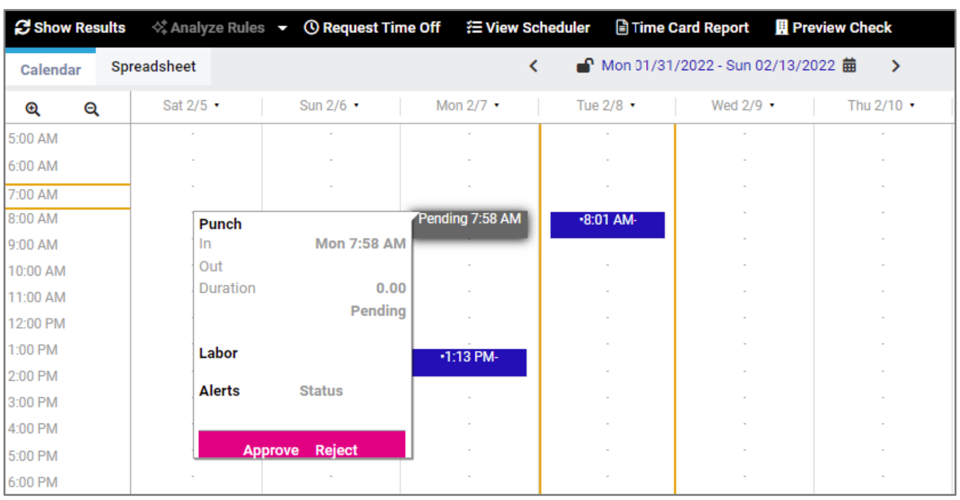


2. Enter the punch type you wish to create. The following options are available:
   - Normal: Used for standard in/out punches.
   - Meal: Used to indicate a meal out or meal in punch.
   - Break: Used to indicate a break out or break in punch.
3. Enter any labor allocation information that you wish to attach to the hours by using the fields in the Labor area. Select the Do Not Round option to prevent the system from applying Rounding Rules to this punch.
4. Enter any notes information that you wish to attach to the hours by using the Notes field.
5. Click on the Save button when finished.

Pending/Missed Punch Review

To review an employee submitted missing punch request on a Time Card, follow the steps below:

1. On the employee Time Card, pending punch requests is displayed in gray with the text "Pending" preceding the time stamp.
2. Left click on the pending punch and you will see an option to either "Approve" or "Reject" the pending punch. If the punch is approved, this will convert the record to a regular punch entry, and the punch will then pair up with either a previous or sequential punch on the Time Card. If the punch is rejected, it will be removed from the Time Card.

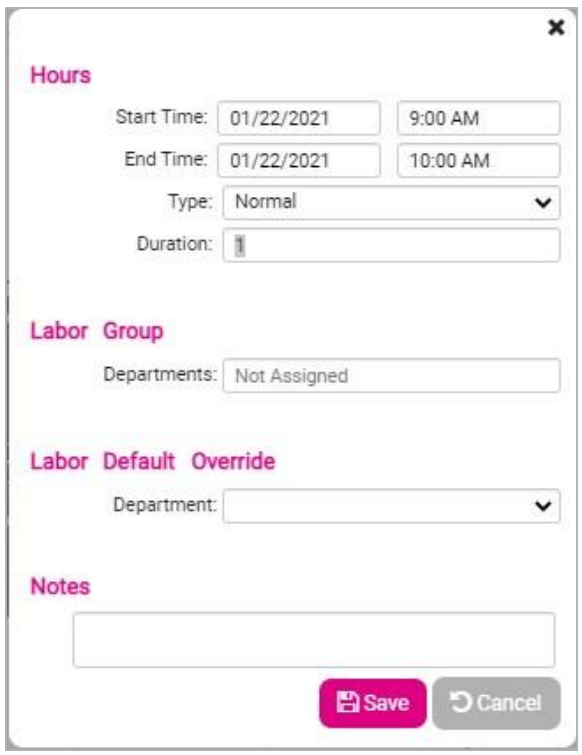


Hours Entry

To enter hours on the Time Card, follow the steps below:

1. Using the mouse, click (and hold the mouse click) on the Time Card at the time, you wish to add hours and drag the mouse downward toward the bottom of the Time Card. This creates a highlighted section of the Time Card.
2. Click on the **Hour** link under the **Add Record** menu.

3. The **Start Time**, **End Time**, and **Duration** is automatically entered for you based on the area selected earlier in step 1.



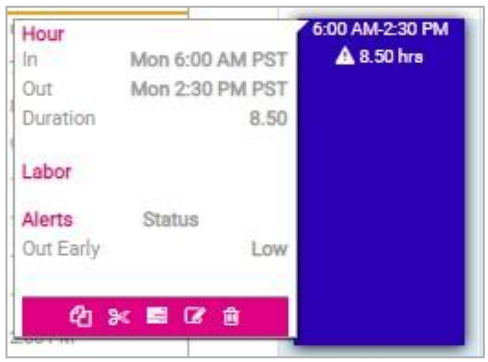
4. Enter any labor allocation information that you wish to attach to the hours by using the fields in the **Labor** area.
5. Enter any notes information that you wish to attach to the hours by using the **Notes** field.
6. Click on the **Save** button when finished.

Hours Detail Preview

Once a punch or hour record is created on the Time Card, details about the record can be viewed by simply holding the mouse over the record on the Time Card.

The hours detail preview displays the following:

- Punch In/Out Time
- Duration of hours record
- Labor Details
- Time Card Alerts



- Clicking on the icon opens the record up for editing.
- Clicking on the icon deletes the hour record from the Time Card.
- Once all of the punch or hour records have been created, click on the Show Results button to commit the entries to the Time Card.

Managing Punch/Hour Records

Once a punch or hour record is committed to the Time Card, it can be, edited, moved, or copied to another day on the Time Card. Please follow the steps below:

1. To edit an existing record, click on it with the mouse to open it up. Alternately, clicking and holding on the punch or hour record will open the options to move or copy the record. Drag the punch or hour record to the desired area on the Time Card. A new menu appears as shown below.

2. Select the command **Move** or **Copy**, as required.
    - Move acts like a cut and paste, physically moving the punch or hour record on the Time Card.
    - Copy opens the punch or hours entry area and automatically inputs the same parameters the original record had assigned to it.

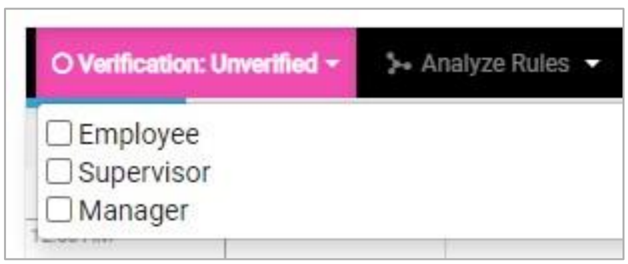
      Note: It is important to note that when utilizing meal or break rules, the hour record may be broken into more than one block as a result of the meal or break rule. The Copy command only copies the portion of the record selected. Currently there is no way to select multiple records for copying at the same time.
3. Once all of the “Move” or “Copy” commands have been entered, click on **Show Results** to commit the records to the Time Card.

If notes exist on a punch or hours record, an indicator will appear on the punch/hour segment. The slide out displays the notes, which can be copied and pasted if needed.

Time Card Verification

Time Card Verification is an optional feature that allows employees, managers, and supervisors to electronically sign off on the Time Card, prior to the data being populated to the time entry grid for payroll processing.

The button to verify the Time Card is located in the top left of the Time Card.

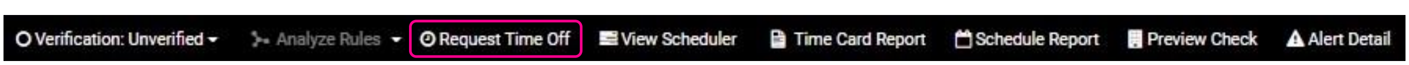


When the button is clicked, all verification levels are shown, and a user may click on the appropriate level using the mouse to verify the Time Card for that level. **Note:** users can only verify a time card within the **Pay Period View**.

Some clients use a feature for employees where they can object to their Time Card. If the employee objects to their Time Card, you will see a status of Objected rather than Verified or Partially Verified. Employees must enter a reason that they are objecting; that is viewed by managers or supervisors by clicking on the status.

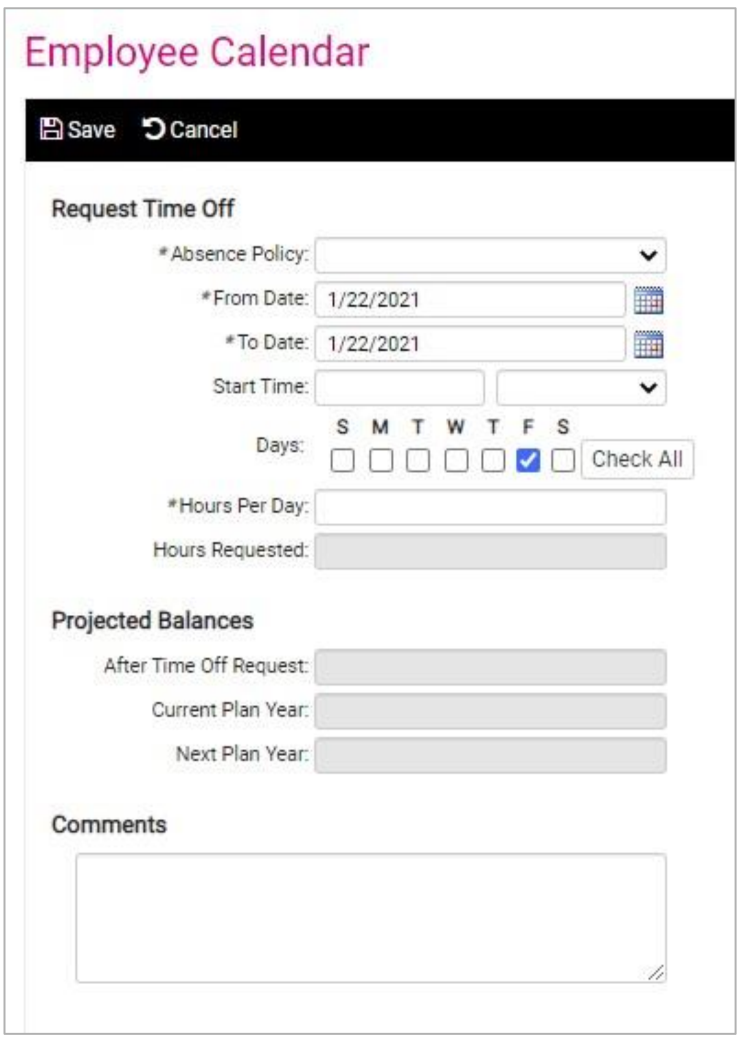
Requesting Time Off

Users have the ability to submit a time off request from the time card screen, by selecting the request time off button on the blue action bar.



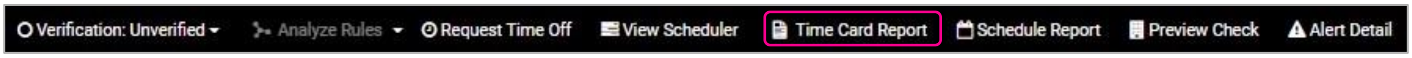
1. Select the **Request Time Off** button from the action bar

2. Enter the time off request details:
    a. Select the **Absence Policy**.
    b. Select the **From** and **To Dates**.
    c. Enter **Start Time** for the absences.
    d. Update corresponding dates of the week.
    e. Enter the numbers of hours per day you are requesting.
3. Review the Projected Balances:
    a. **After Time off Request:** What the employee balance will be after the request is made. This is simply the current balance minus the request.
       Note: This does not take any future awards/pending/limits into consideration after the date of the request.
    b. **Current Plan Year:** Balance takes all current requests/future awards/pending approvals/limits into consideration to the end of the current plan year.
    c. **Next Plan Year:** Balance takes all current requests/future awards/pending approvals/limits/carryover into consideration through the end of the next plan year.



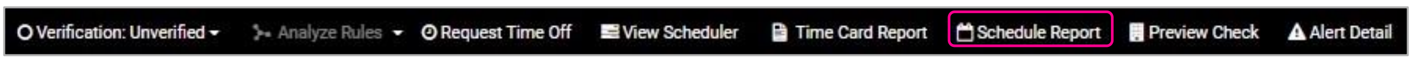
Time Card Report

The Time Card – Time Card Report link allows any user to run the Time Card report for the current pay period without needing to go to the Reports area. This link is displayed to all users and cannot currently be removed.



Schedule

Once schedules have been created, the employee's Time Card will display the employee's schedule. Visually, the schedule appears behind all time transactions that are entered, giving the user the ability to quickly see worked time vs. scheduled time

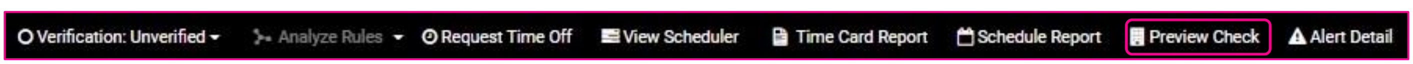


If you are using Attendance Rules in conjunction with your shifts, any alerts generated by discrepancies between employee schedules and the actual punches on their Time Card are displayed.

Click on the Schedule icon (highlighted in the above screen shot) to view a report of the employee's scheduled shifts.

Time Card – Preview Check

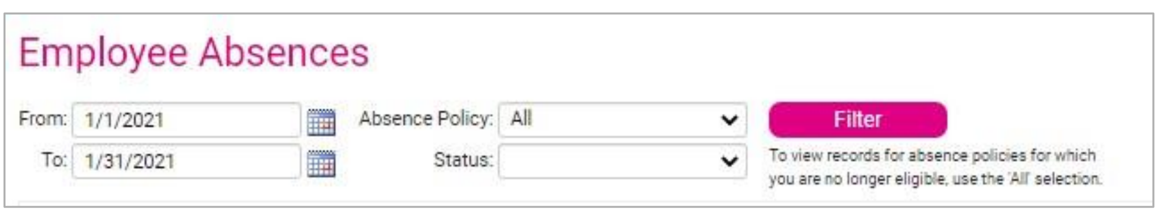
The Time Card – Preview Check link allows any user with access to this link to preview the check for the employee using the current data on the Time Card. This link can be disabled via the "Time Card Permissions Rule.



Employee Absence

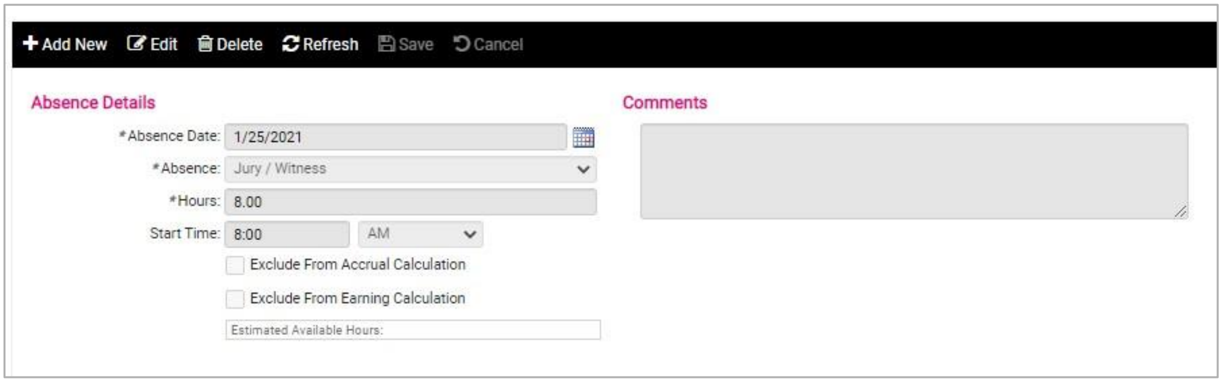
The top of the Employee Absence area allows a user to find absences that have already been entered in isolved. Please follow the steps below to search for an absence entry:

Go to Employee Self Service › Time › Employee Absences.



1. Click on the Add New button to start a new absence entry.
2. Enter the date for the absence entry in the Date field.
3. Select the appropriate absence type using the Absence field.
4. Enter the number of hours for the absence entry using the Hours field.
5. Enter the start time of the absence, and any comments in the comments fields, if necessary.

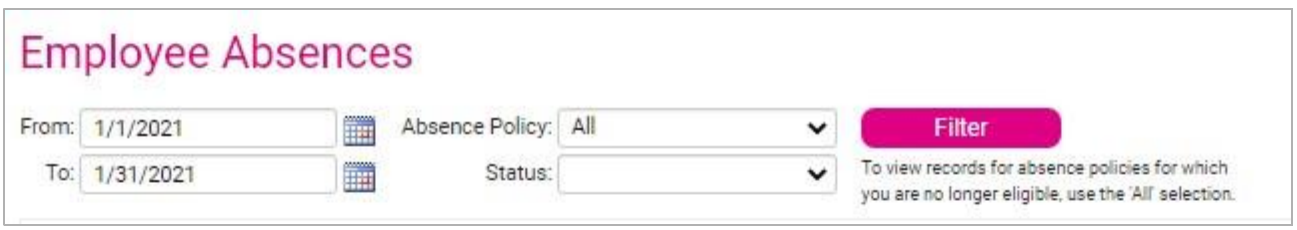
6. Select the **Save** button to save the absence entry.



Employee Absences - Search

The top of the Employee Absence area allows a user to find absences that have already been entered in isolved. Please follow the steps below to search for an absence entry:

Go to Employee Self Service > Time > Employee Absences.

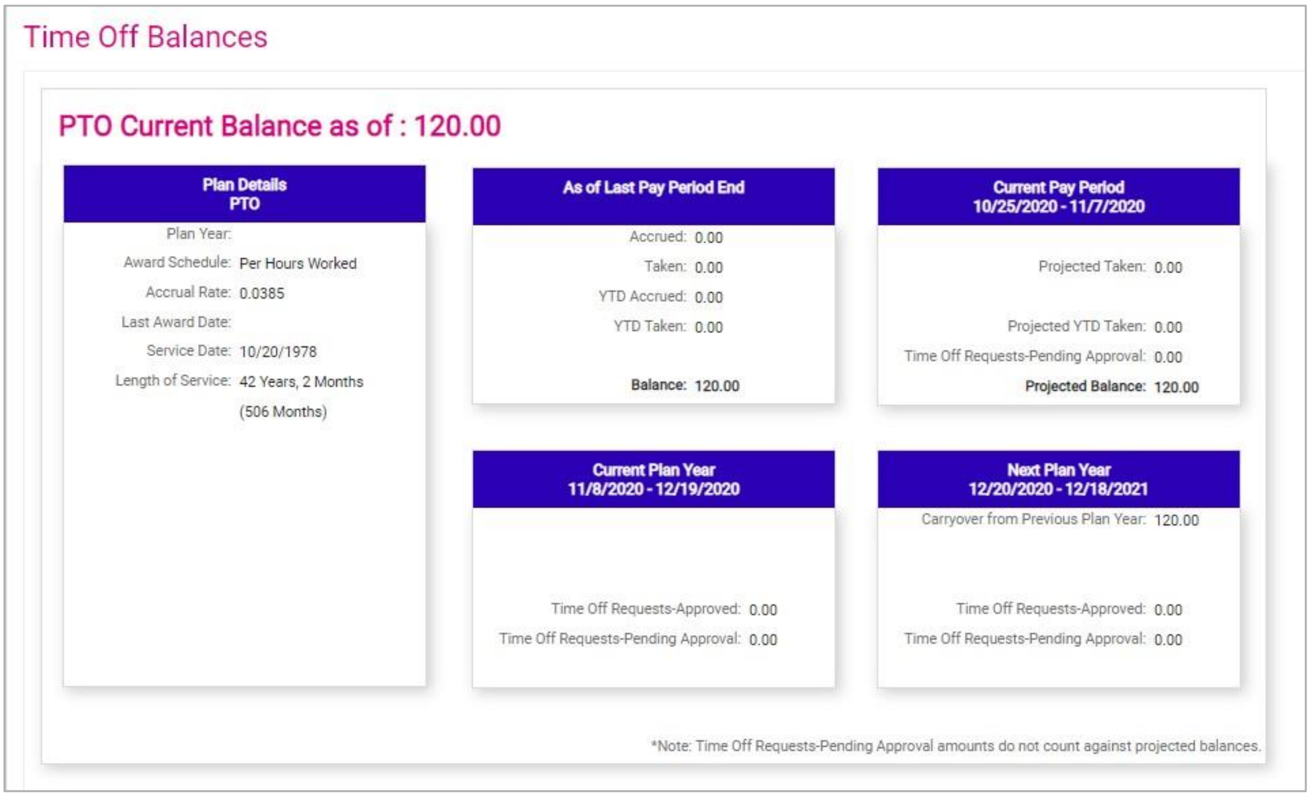


1. Enter the date range in which you want to search for the absence using the To and From fields.
2. Select the absence policy type to use for the search, if any, using the Absence Policy field.
3. Select the status type to use for the search, if any, using the Status field.
4. Click on the Filter button.

Time Off Balances

The Time off Balances area is used by employees and managers/supervisors to view data about any accrual policy assigned to the employee. To view the accrual data, follow the steps below:

Go to Employee Self Service › Time › Time off Balances.



The following data is displayed in the Time off Balances area:

Plan Details

This section gives you an overview of the plan.

- Plan Year: Looks at your current plan year and displays.
- Award Schedule: How often you accrue time during the plan year.
- Accrual Rate: How much time you accrue each Award Schedule.
- Last Award Date: The last date that time was awarded to your balance.
- Service Date: What date your accruals are being calculated from.
- Length of Service: How long you have been with the company based on your Service Date. As of Last Pay Period

What happened in the last payroll run for this plan.

- Accrued: How much time was accrued in the last pay period.
- Taken: How much time was taken in the last pay period.
- YTD Accrued: How much time has been accrued from the start of your accrual period through your last pay period.
- YTD Taken: How much time has been taken from the start of your accrual period through your last pay period.
- Balance: What your final balance is based on your last pay period.

Current Pay Period Details

What is going to happen when the next payroll is ran.

- Projected Accrued: How much time will be accrued in the current pay period.
- Projected Taken: How much time will be taken in the current pay period.
- Projected YTD Accrued: How much time will be accrued from the start of your accrual period through your current pay period.
- Projected YTD Taken: How much time will be taken from the start of your accrual period through your current pay period.
- Time Off Requests- Pending Approved: How many time off requests are pending approval in the current pay period.
- Projected Balance: What your projected balance will be, considering any approved time off requests.
  Note: Any pending time off requests *will not* be taken into account.

Current Plan Year Details

What has happened during the plan year, and what will happen through the rest of the year.

- Balance As Of: What is my current balance as of.
- Projected Accrued: How much time will I accrue for the rest of the plan year.
- Time Off Requests- Approved: Hours amount of time off requests that are approved through the plan year.
- Time Off Requests- Pending Approved: Hours amount of time off requests that are still pending approval through the plan year.
- Projected Balance: What my projected balance will be at the end of the plan year taking into account any approved time off requests.
  Note: Any pending time off requests *will not* be taken into account.

Next Plan Year Details

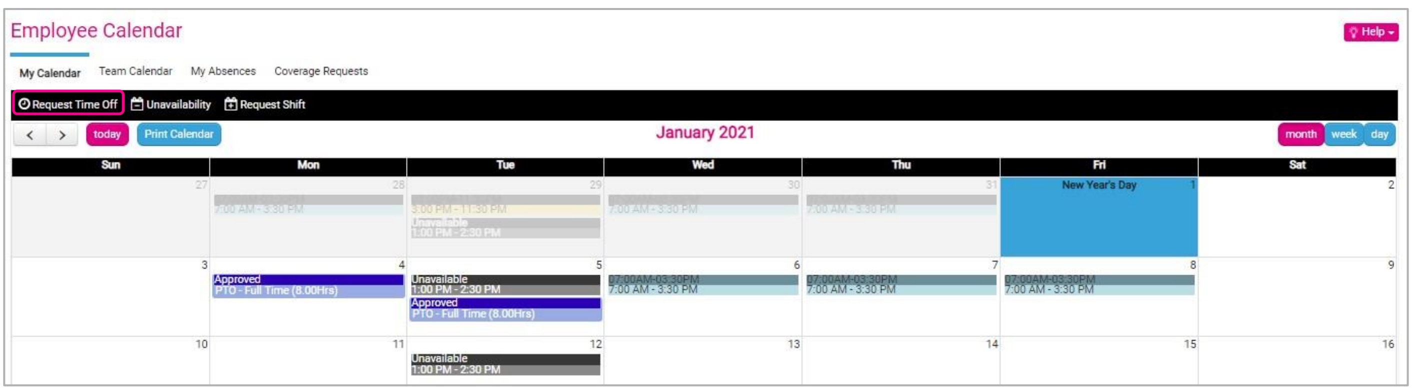
Projection of what will happen next year.

- **Carry Over from Previous Plan Year:** How many hours were carried over from the previous plan year.
- **Projected Accrued:** How many hours you are projected to accrue during the next plan year.
- **Time Off Requests- Approved:** How many time off request hours have been approved for the next plan year.
- **Time Off Requests- Pending Approved:** How many projected time off request hours are pending approval in the next plan year.
  Projected Balance: What your accrued balance will be after taking into account your approved time off request.
  Note: Any pending time off requests *will not* be taken into account.

Employee Calendar

The **Employee Calendar** area is used by an employee to enter a request for time off into isolved. If the employee enters the request, the manager or supervisor will then approve or deny the request as appropriate within isolved using the **Admin Calendar** area. To create a Time off Request, please follow the steps below:

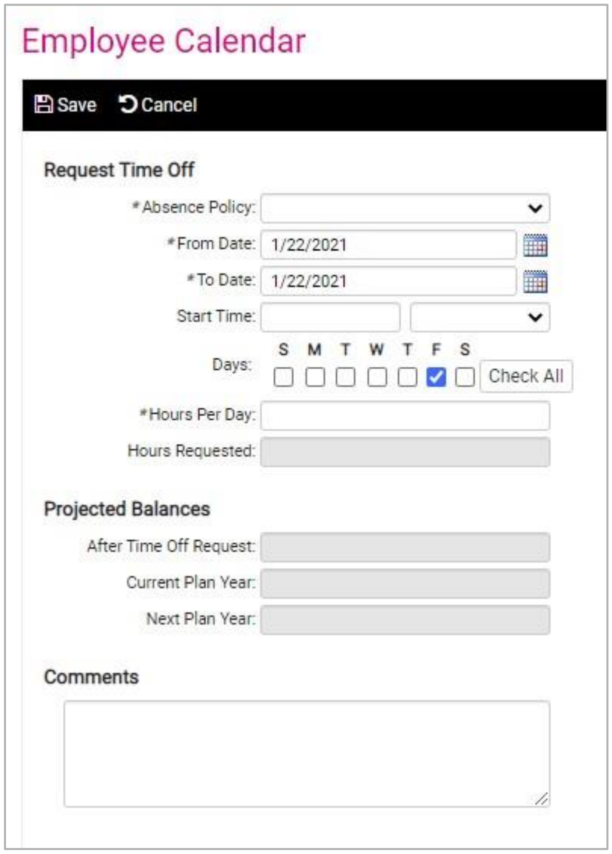
Navigate to Employee Self Service > Time > Employee Calendar.



1. Click on the **Request Time Off** button at the top left of the calendar to create a time off request.
2. Enter the time off request details.
   a. Select the **Absence Policy**.
   b. Select the **From** and **To Dates**.
   c. Enter Start time for the absences.
   d. Update corresponding dates of the week.
   e. Enter the numbers of hours per day you are requesting.
4. Review the Projected Balances
   a. **After Time off Request**: What the employee balance will be after the request is made. This is simply the current balance minus the request.
   Note: This does not take any future awards/pending/limits into consideration after the date of the request.
   b. **Current Plan Year**: Balance will take all current requests/future awards/pending approvals/limits into consideration to the end of the current plan year.

c. **Next Plan Year**: Balance will take all current requests/future awards/pending approvals/limits/carryover into consideration through the end of the next plan year.

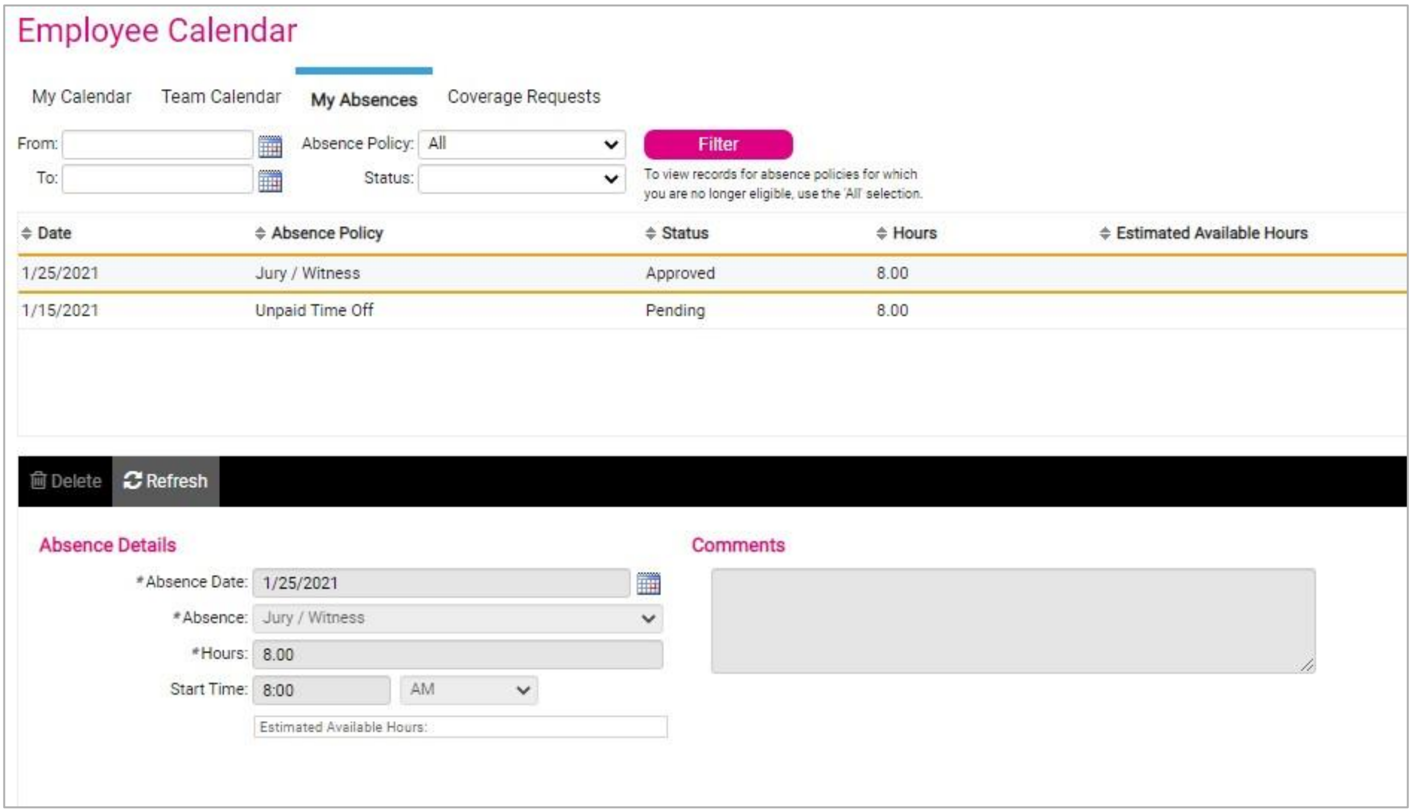
Note: Employees are not be able to submit a time off request for a closed pay period.



Employee Calendar – View

Once the time off request is created, it can be viewed in the **Employee Calendar** area, as shown below:

As you can see in the example, the absence name, approval status, number of hours per day, are all displayed on the calendar, for the employee. When selecting the absence on the calendar, the Absence Details screen opens and displays the following:

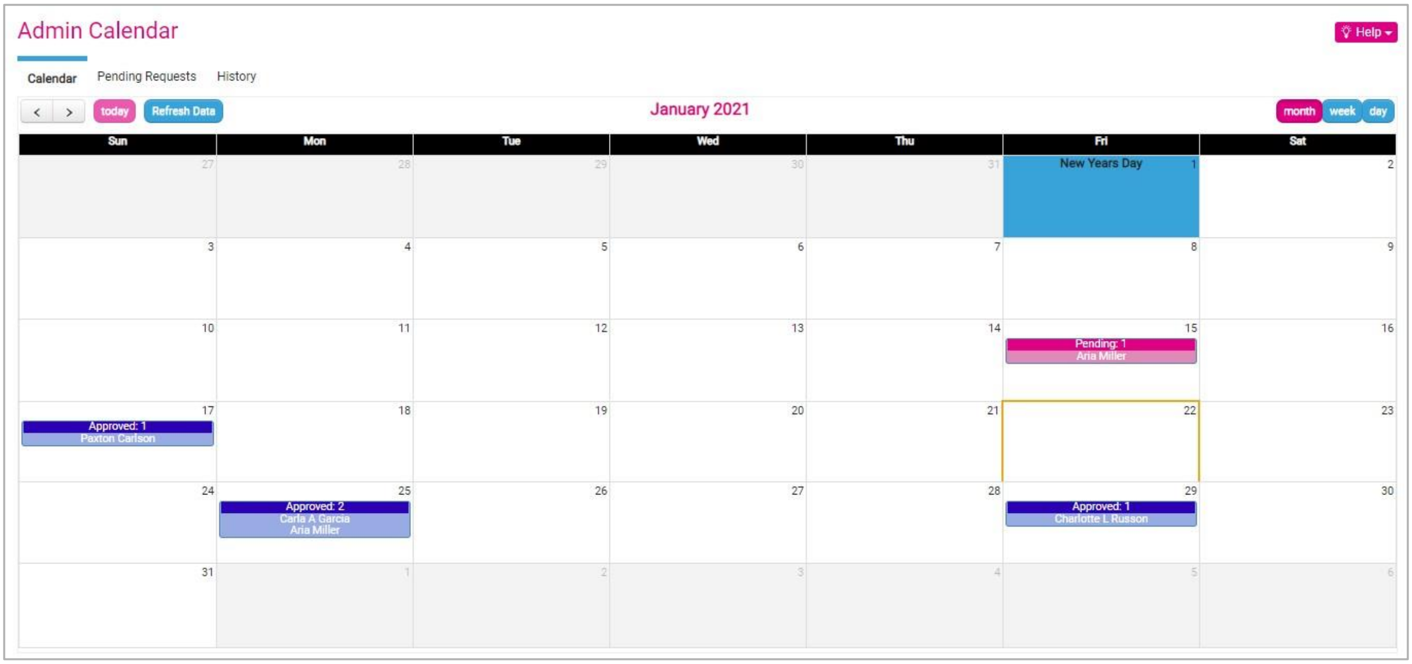


The detail tab shows the absences in a list format and can be used to filter the list down to only absences within a specific window, absence type, or status. To use the absence detail search, please follow the steps below:

1. Go to Employee Self Service > isolved Time > Time Off Requests.
2. Click on the Details tab.
3. Enter the date range in which you want to search for the absence using the To and From fields.
4. Select the absence policy type to use for the search, if any, using the Absence Policy field.
5. Select the status type to use for the search, if any, using the Status field.
6. Click on the Filter button.

Admin Calendar

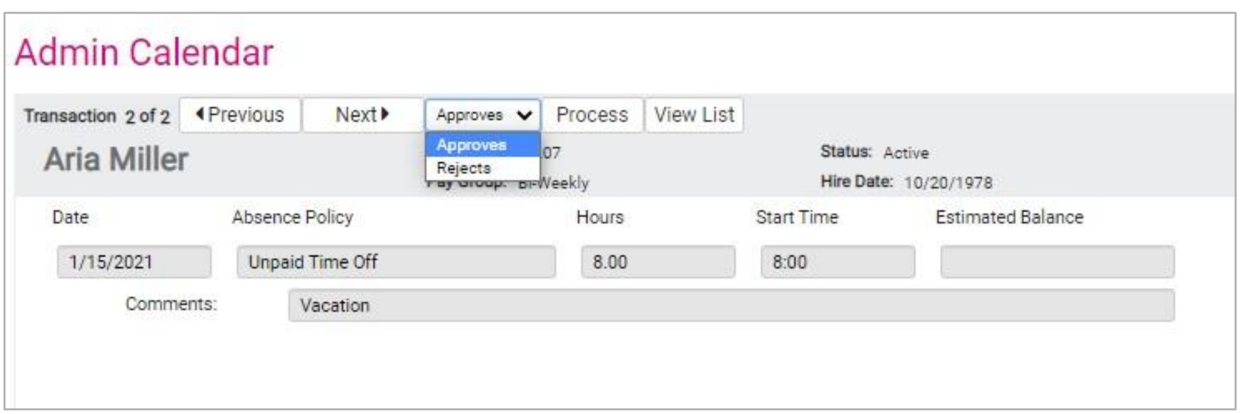
The **Admin Calendar** page is used by Managers/Supervisors to approve or reject time off requests within isolved.



To approve a time off request, please follow the steps below:

1. From the calendar, click on the **Pending Requests** tab.

2. Click on the request to open the time off request.



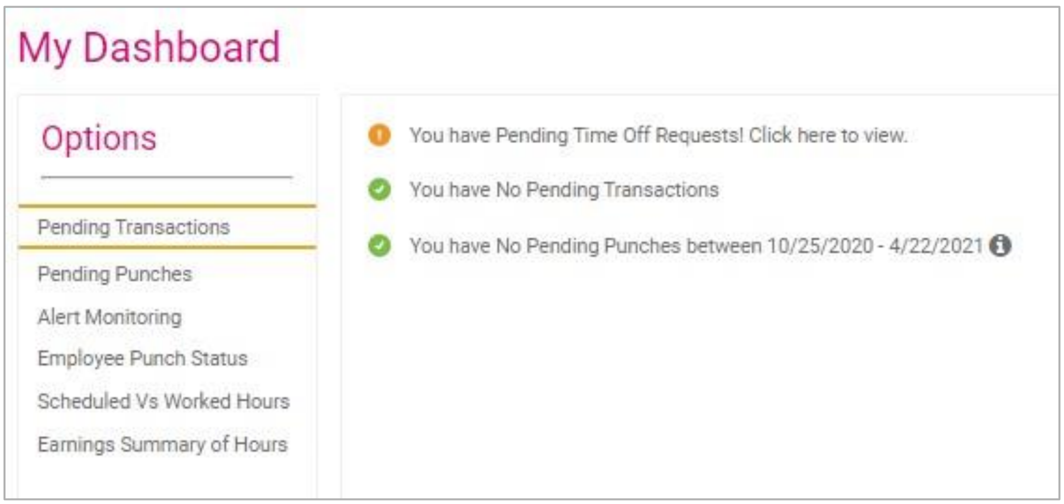
3. Using the menu at the top left (shown in red above), a supervisor or manager can select either "Approve" or "Reject" and click on the **Process** button to process the update.

My Dashboard

My Dashboard was designed to provide you with up-to-date information on your employees, conveniently provided in one screen. You have the ability to review pending transactions, monitor alerts, view employee punches statuses, scheduled hours vs. worked hours, and view a summary of earnings for your employees.

This screen is equipped to cache your filters when switching between pages. The system holds dashboard filters and previous settings to eliminate the need for users to re-filter each time they visit the Dashboard.

Example: User logs in and filters their dashboard and selects the view time card option to correct a missing punch. The system directs you to the employee time card, and when you return to the My Dashboard all previous filters are still in place.

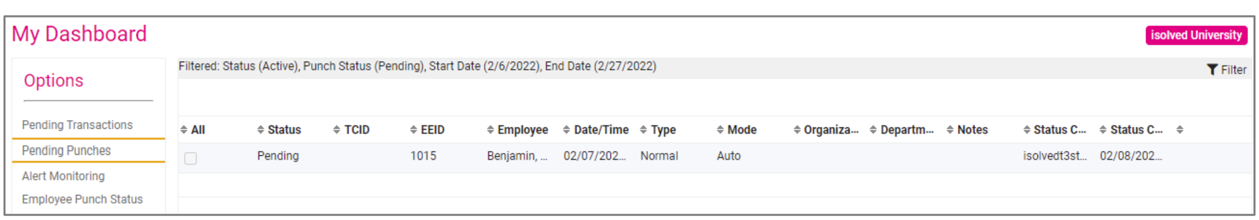


Pending Transactions

The Pending Transactions option alerts you if you were included in an approval workflow. This is for items like employee updates, time off requests, etc. You can select the "You have Pending Time Off Requests", "You have Pending Transactions" or "Pending Punches" option and you are directed to the appropriate screens for approval.

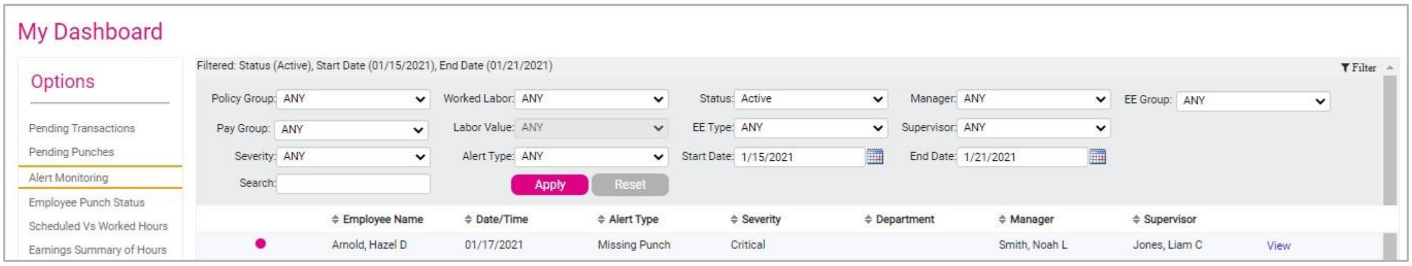
Pending Punches

Pending Punches displays any missing punch requests entered by employees that may need to be reviewed. Selecting the link for Pending Punches displays a dashboard view with all outstanding requests for employees that report to you. There is an option to review and approve or reject requests from the dashboard view, or pending punches may also be approved from the employee Time Card view.



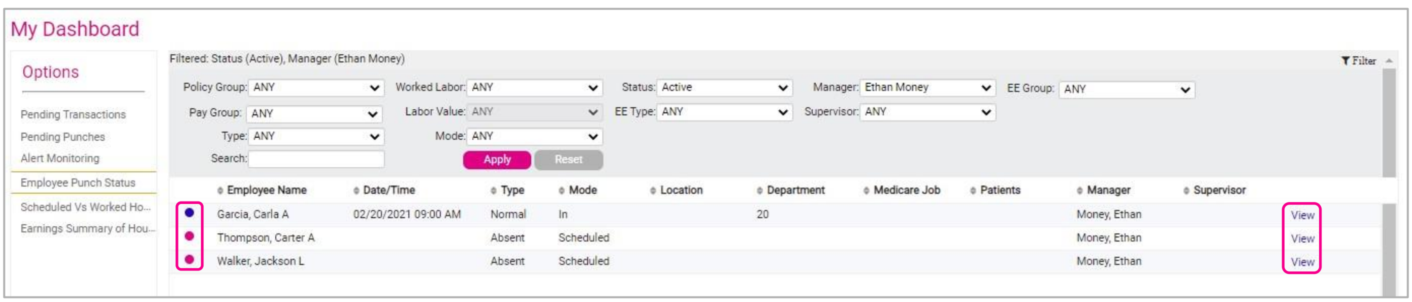
Alert Monitoring

Alert Monitoring allows you to run a quick report on employees with outstanding Time Card alerts. You can filter the report based on many options, and filter to show just one specific alert. The color-coding of the dots on the left side of the screen duplicate the severity you have set up in **Alert Rules**.



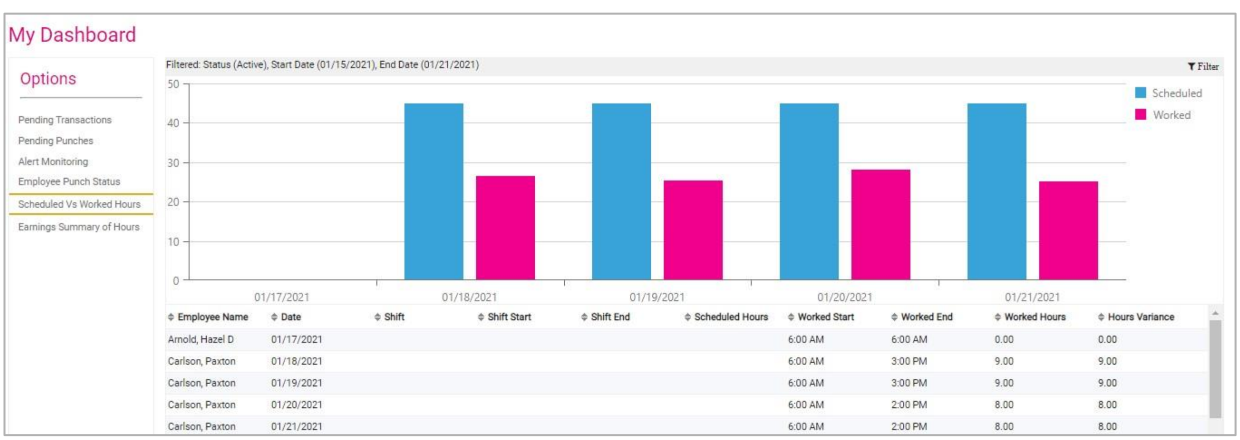
Employee Punch Status

Employee Punch Status allows you to see the last activity on your employee's Time Card. You can filter this screen based on certain criteria to narrow your list. You can select the blue "View" link on the right-hand side to go directly to an employee's Time Card.



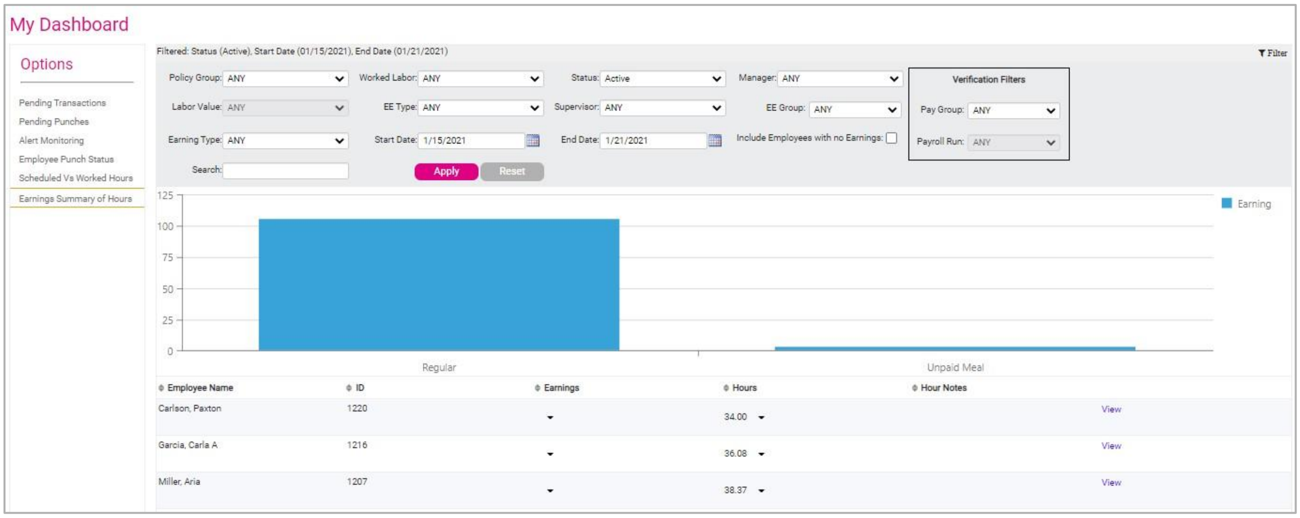
Scheduled vs. Worked Hours

Scheduled vs. Worked Hours allows you to see a bar graph of your employees scheduled hours vs. actual time worked. There is also a charted version of the data. The first row in the chart shows you the details on their scheduled time. The second row shows you their actual details.



Earnings Summary of Hours

Earnings Summary of Hours allows you to view a report of your employees hours broken up by earning type. You can also verify all of your employee's timesheets on this screen.



The option to verify for a manager or supervisor appears in the top right corner of the filters. You can select a Pay Group and the Payroll Run. A Client user, Manger, and a Supervisor can verify Time Cards on this screen or see who has been verified.

Filters

The filters that are available in each dashboard report are listed below:

- Policy Group
- Pay Group
- Severity
- Earning Type
- Punch Type
- Punch Mode
- Worked Labor
- Labor Value
- Status
- EE Type
- Manager
- Supervisor
- Alert Type
- Search (Employee)
- Start Date
- End Date
- Payroll Run

Results

Sortable Columns with data representing:

- Color Indicators
    - Red=High and Critical Alerts
    - Orange=Medium Alerts
    - Blue=Low Alerts
- Employee Name
- Date/Time
- Alert Type
- Severity
- Labor
- Manager
- Supervisor

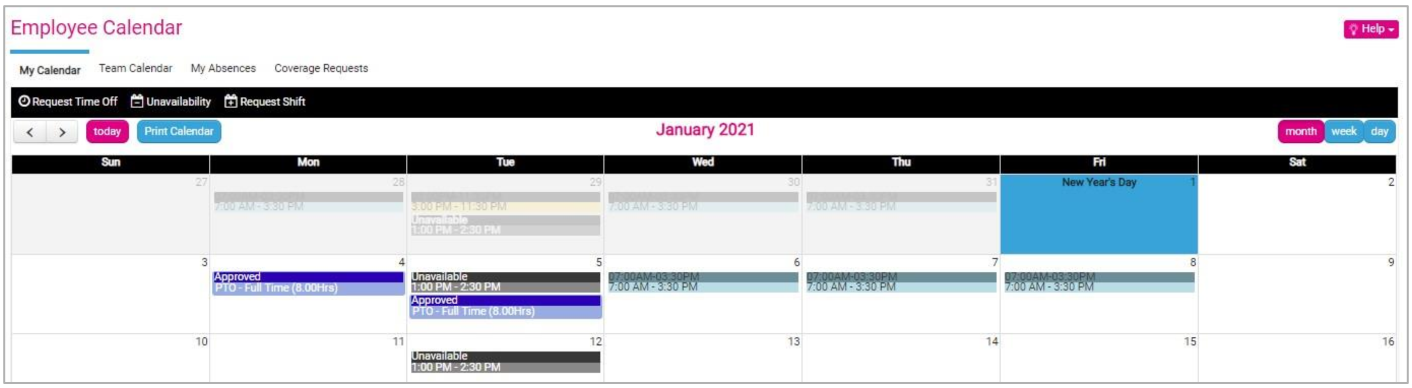
My Calendar and Team Calendar

This section reviews what is displayed to employees on the My Calendar and Team Calendar screens.

- My Calendar allows the employee to view their schedules and absence requests.
- Team Calendar allows them to view their team's accrual requests.

My Calendar

Navigate to Employee Self Service > Time > Employee Calendar, and click on the **My Calendar** tab.

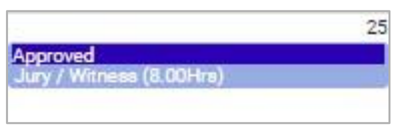


- Assigned shifts are displayed for each day the employee is scheduled. The following is displayed:
    - Shift Colors
    - Shift Name
    - Shift Start and End Times
    - "Manual," "Overridden" and "Default" schedule assignments
    - If a shift has been overridden:
        - Instead of the shift name, the label "*Overridden*" is displayed.
        - The shift start and end times are displayed according to the override.
    - If a shift crosses midnight, the shift is displayed on the day based on the employee's Policy Group setting "Apply Crossing Boundary To."
        - If the boundary setting is set to "Start Time," a symbol after the shift end time indicates that the shift crosses into the next day.
          Example: *08:00 PM – 05:00 AM > >*
        - If the boundary setting is set to "End Time," a symbol appears before the shift start time to indicate that the shift crosses into the previous day.
          Example: < < *08:00 PM – 05:00 AM*
        - If the boundary setting is set to "Split" or "Majority," it is displayed as if it is set to the start time on the calendar.
          Example: *08:00 PM – 05:00 AM > >*

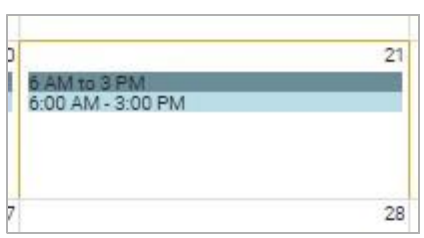
- Holidays are displayed based on employee assignment, and are shown with a BLUE background to match the Time Card screen.

- Black-out days are displayed according to employee assignment, and are shown with a GREY background.
- Shifts are displayed before “Pending” transactions.
- “Pending” transactions are displayed before “Approved” items.
- “Pending” transactions are displayed after “Holiday” names.
- “Approved” transactions are displayed after “Holidays” when no “Pending” transactions exist, and are shown with a PINK background and white text.

- The “Approved” transaction bar is PURPLE with white text.



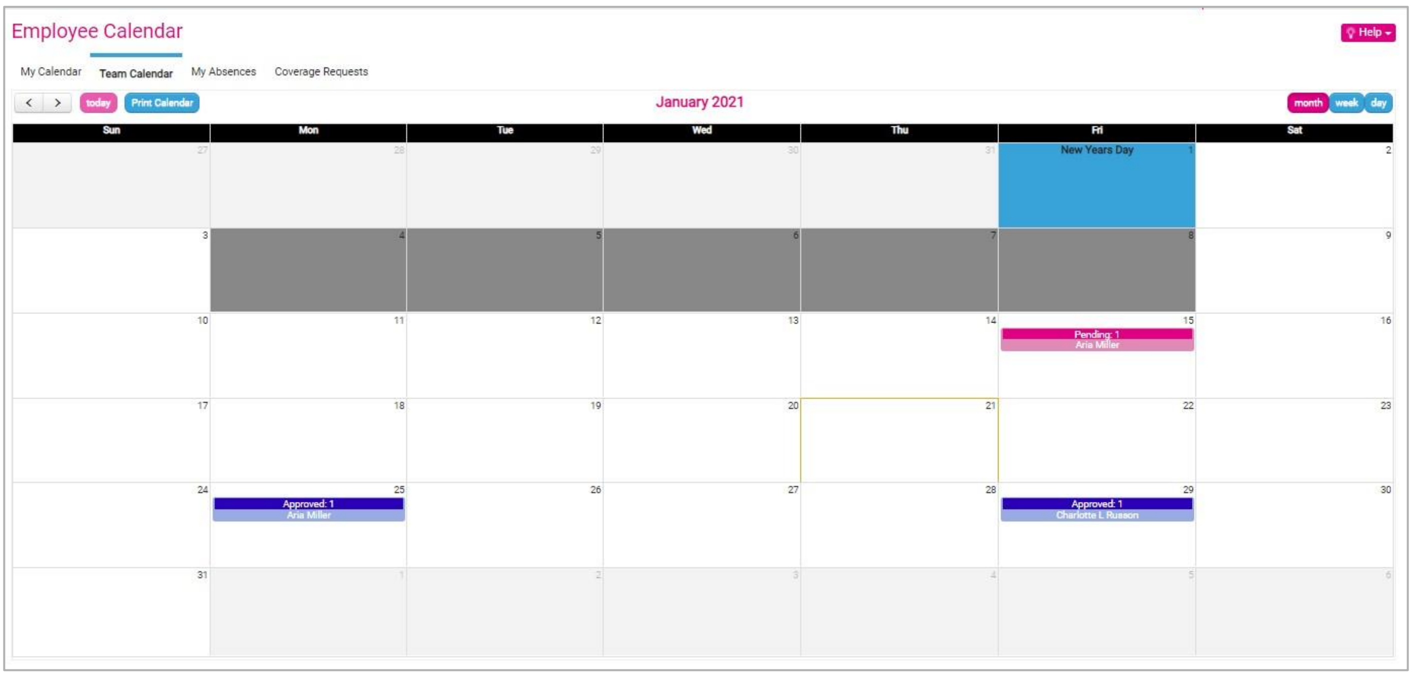
- GREY days/information not included in the moth being displayed. “Pending” or “Approved” items are shown in GREY when outside of the current month date range.
- When clicking on a “Pending” or “Approved” item, navigate to the My Details tab for additional information. Highlight/select the item that was clicked on when My Details was loaded.
- Calendar days have a fixed minimum height and width and will be uniform in size to all other days in the calendar.
- The current date is displayed with a Gold outline, matching the Time Card screen.



- The **Print Calendar** icon on the **My Calendar** screen allows you to print the displayed information (month/week/day views).

Team Calendar

Click on the **Team Calendar** tab.



- Employee can view their team to see “Approved” and “Pending” accruals.
- The user must be a member of the team in order to see the team Time Off Requests.
- If the user is not a team member, the “Team Calendar” tab is not displayed.
- Holidays are displayed based on system Holidays, not employee Holiday assignments.

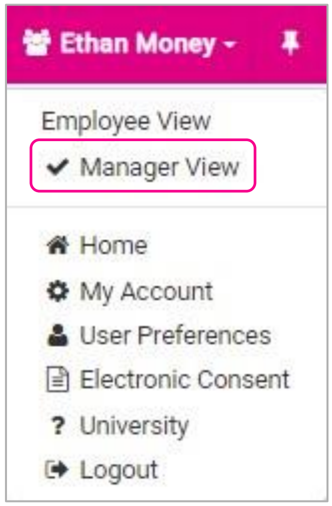
The following content is displayed based on “Calendar Rule” permissions:

- View Team Calendar
- Holidays
- Employee Names
- Absence Names
- Absence Hours
- Pending Absences

Note: Absence Notes are not displayed on the Team Calendar.

Group Punching

Group punching allows Manager/Supervisor users to create punches for an entire group of employees at a time. This prevents you from having to enter the same punch data for multiple employees individually.

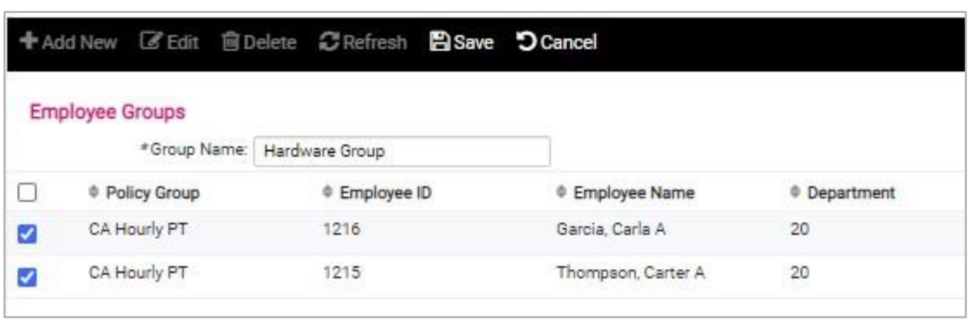


From the drop-down menu displaying your name in the upper left-hand corner of the screen, ensure that your view is set to Manager View or Supervisor View. Group punching screens are not available from Employee View.

Before group punches can be entered, you must first create the punch groups that you will use. These groups also synchronize with the isolved Time Adaptive Employee Experience.

Manage Groups

Browse to Employee Self Service › Time › Manage Groups.



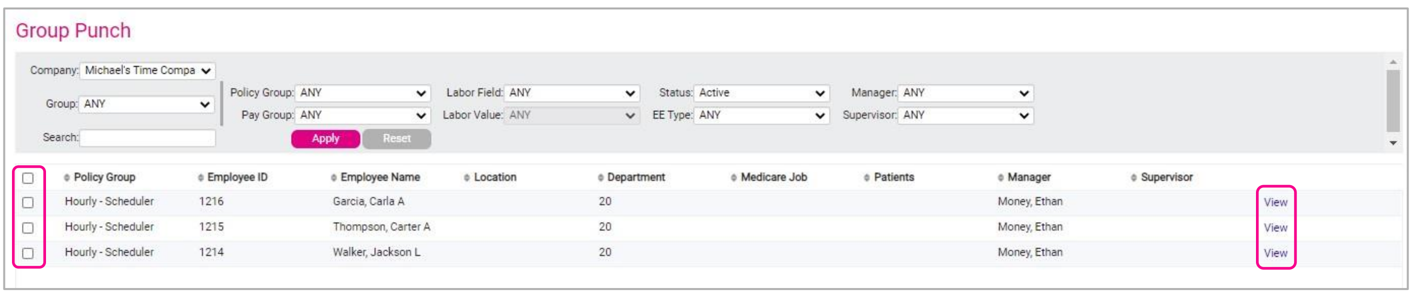
1. Enter a name for this punch group in the Group Name field.
2. Each employee that you are assigned to manage/supervise is displayed. Put a check mark in the box next to each employee that you would like to assign to this punch group.
3. Click on the Save icon to save the punch group.

Your existing punch groups are displayed at the top of the screen.

Group Punch

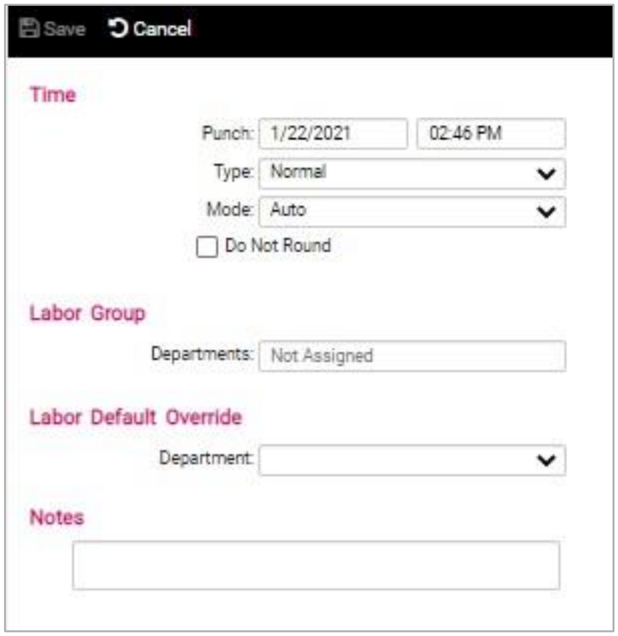
Once you have created groups for the employees that you would like to add punches for, browse to Employee Self Service > Time > Group Punch.

The **Group Punch** screen is separated into two sections. The top of the screen allows you to select the group that you would like to create punches for, and to select individual employees within that group in the scenario that you do not want to add punches for the entire group.



1. Select the group that you would like to enter punches for from the **Group** drop-down menu. Further filter your punch groups using the provided drop-down menus. Click on the **Apply** icon to display the employees included in the group, based on your selection and filters.
2. Make individual selections within the punch group by placing a check mark in the box next to each employee's name. Click on the check box next to the **Policy Group** heading to select the entire punch group.
3. The bottom section of the screen is where punch information is specified for the selected employees.
4. In the **Time** section of the screen, enter the date and time in the Punch field.
5. Select the appropriate punch **Type** and **Mode,** as desired.
6. By default, any Rounding Policies employees are assigned to are applied to group punches. Put a check mark in the **Do Not Round** option to override punch rounding.
7. Enter any optional **Labor Default Override** and punch **Notes**, if desired.

8. Click on the **Save** icon to create the punch for the specified employees.

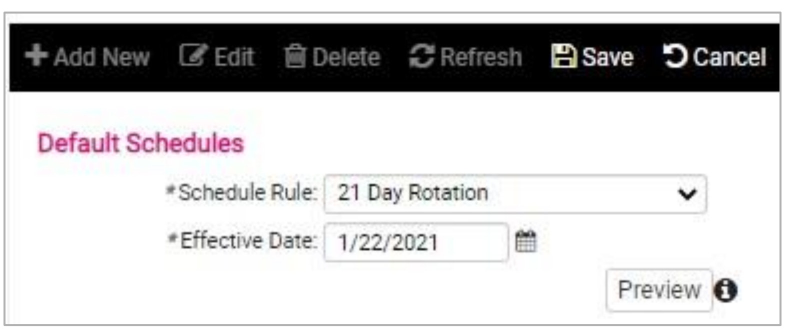


Applying Default Schedules

Once you have built your Schedule Rules, use the following instructions to add the Default Schedule to employees.

Navigate to Employee Admin Tools > Employee Administration > Employee Scheduling > Default Schedule.

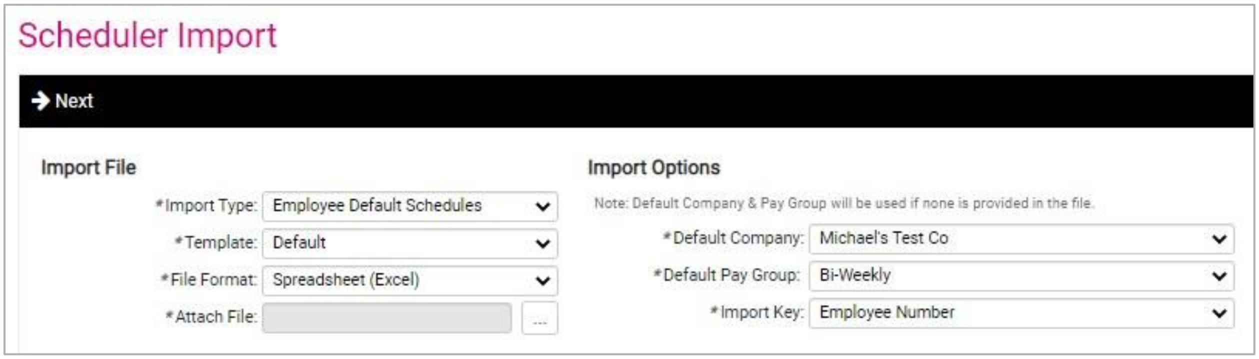
1. Click on the **+ Add New** icon.
2. Select a **Schedule Rule** from the drop-down menu.
3. Enter an **Effective Date.**
4. Click on the **Save** icon.



5. **Preview** allows you to preview the “Employee Attendance” report (with run through the “Current Employee Attendance Report”) based on the Pay Period where the effective date resides, for only this employee assigned the Default Schedule Rule.

Importing Default Schedule

Users can also import Default Schedules by navigating to Employee Admin Tools › Employee Administration › Employee Scheduling › Schedule Import.



The required columns and format are as follows:

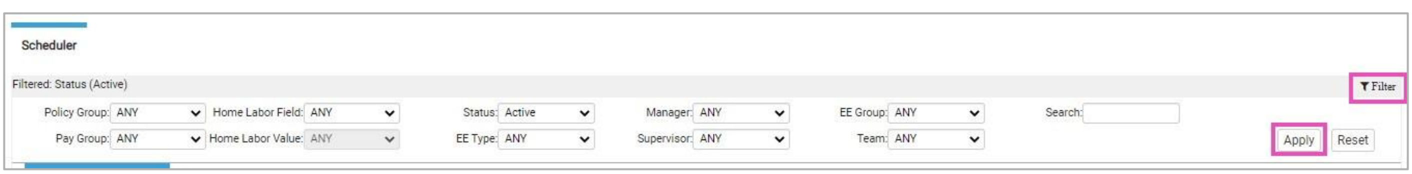
Key	EffectiveDate	ScheduleRuleName
(EE #, SSN, Timeclock ID)	MM/DD/DDDD	Schedule Rule Name (Must Be Exact)
110	7/19/2017	Office
120	7/19/2017	2nd Shift

Employee Scheduler

The Scheduler section of the program allows you to assign shifts to the employees in the system or make edits/overrides to existing schedules for specific days.

Screen Layout

Navigate to Employee Admin Tools › Employee Administration › Employee Scheduling › Scheduler.

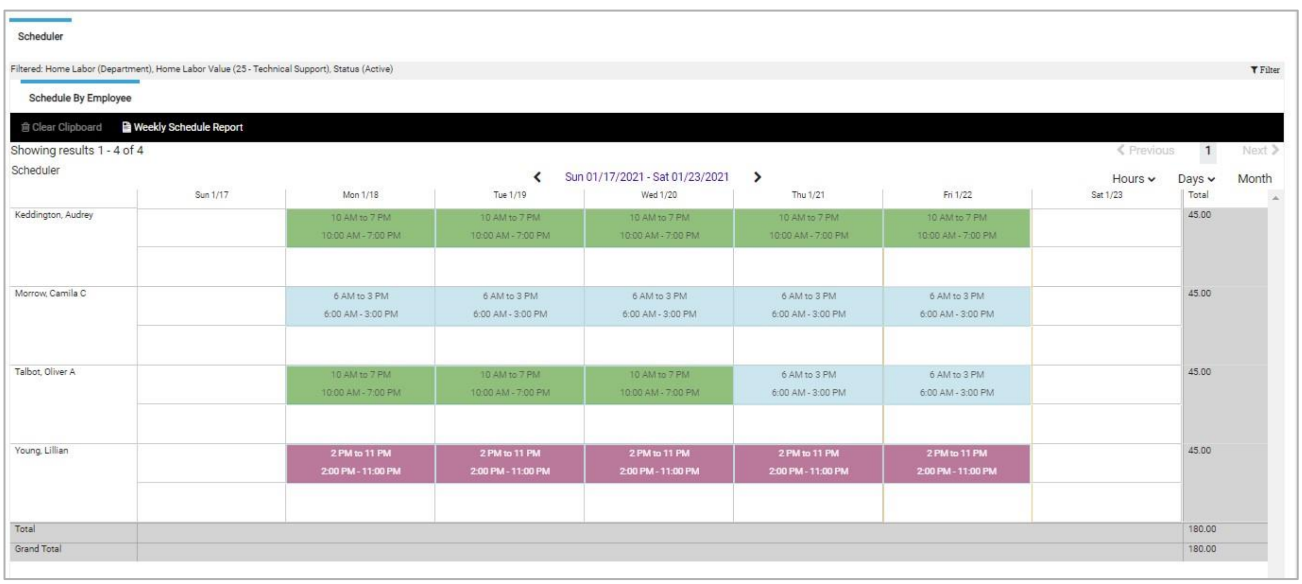


- The filter options at the top of the screen allow you to narrow down the list of displayed employees. For example, if you would like to create schedules for employees assigned to a specific supervisor only, make the desired selection from the **Supervisor** drop-down menu. Once the desired filter options have been selected, click on the **Apply** icon to refresh the employee list.

- The Scheduler is displayed in table format. Employees are listed in the left-hand column. Multiple table views can be selected from the drop-down menus located to the right of the displayed date range.
    - Hours: To view a range of hours on the Scheduler table, make the desired selection from this drop-down menu. The available options are:
        - 12 Hours
        - 24 Hours
        - 48 Hours
        - 72 Hours
    - Days: To view a range of days on the Scheduler table, make the desired selection from the drop-down menu. The available options are:
        - 7 Days
        - 14 Days
        - 21 Days
        - 28 Days
        - 42 Days
    - Month: Click on this selection to view the Scheduler table in a standard 30-day month format.

  The header at the top of the table shows the displayed date range, based on your view settings. Click on the Back and Forward icons to scroll through dates.

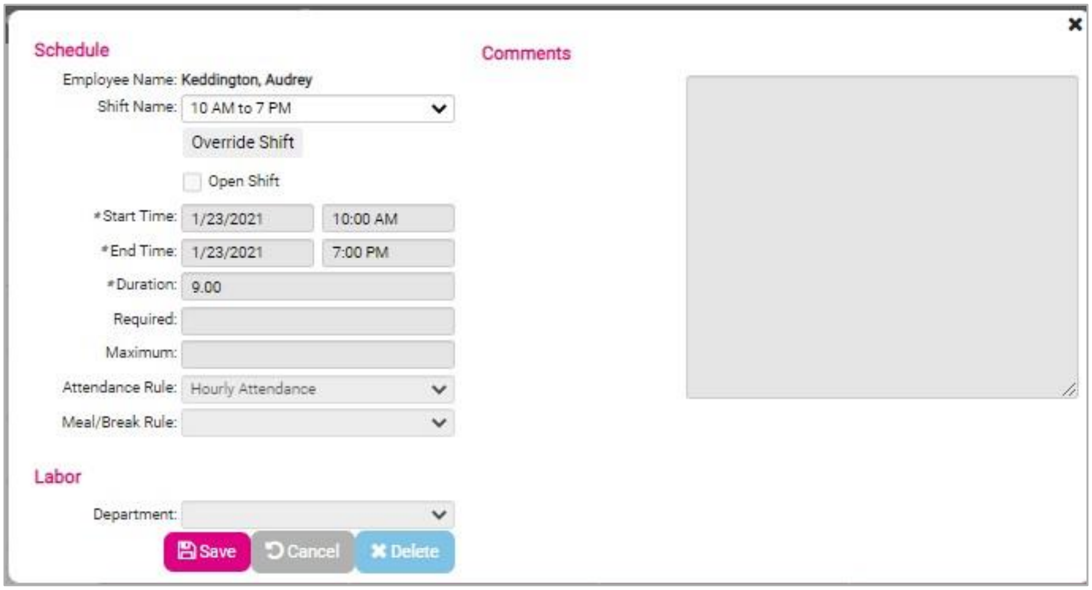
Creating Schedules



Scheduling a Single Shift

1. Select a cell on the grid next to the employee you wish to apply a schedule to.
2. Select from the list of pre-defined shifts.
3. Review Shift Info.

4. Select Save.

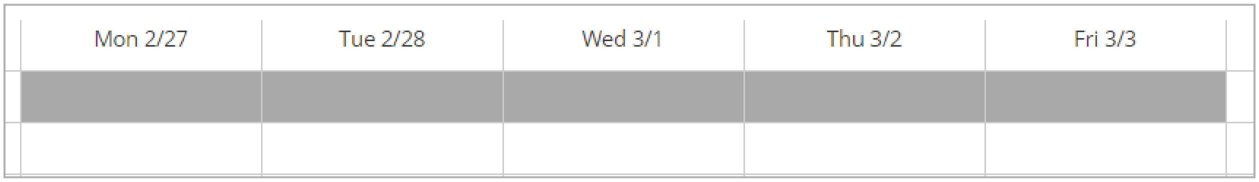


The following options appear under the Scheduler section:

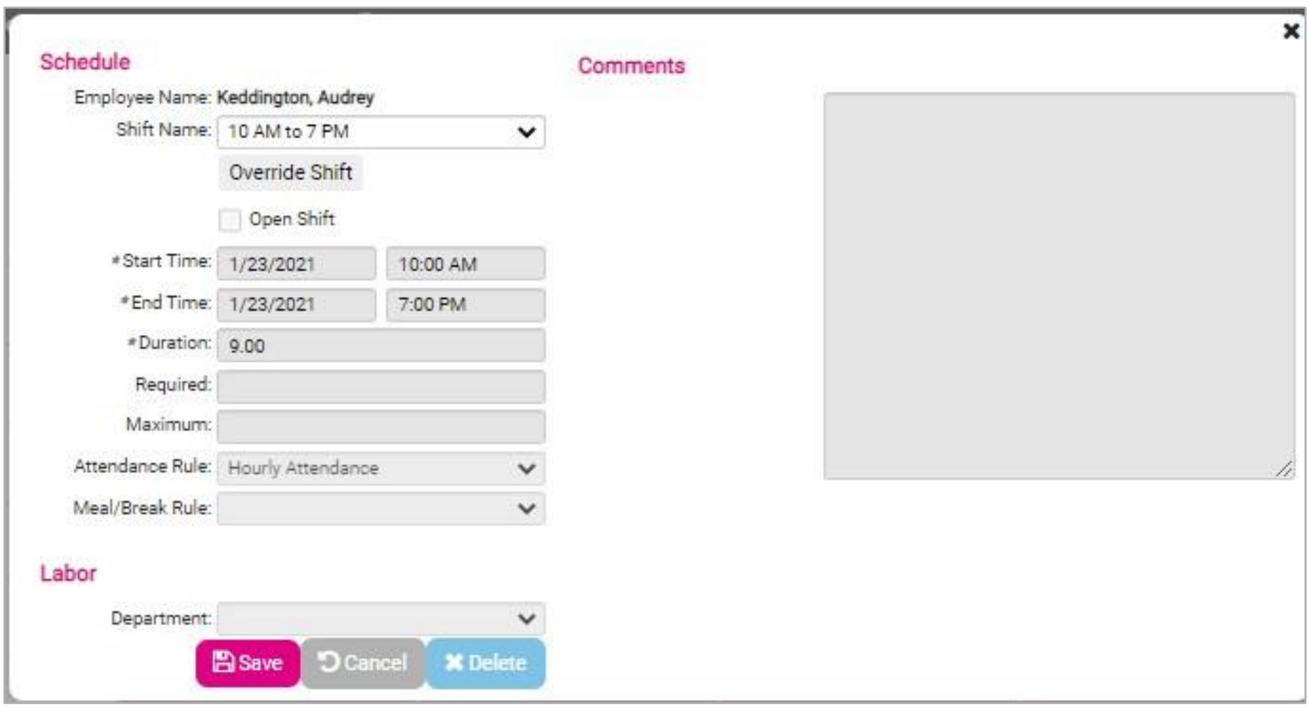
- Shift Name: This field is where the shift that the user would like to assign to the schedule is selected. Once a selection has been made, the remaining field values are automatically populated with the default shift information.
- Override Shift: When enabled, clicking on this icon allows all fields to be editable so that the default shift parameters can be overridden.
- Open Shift: If this option is selected, the "Start Time" and "End Time" are removed from the shift. Only the "Duration" of a shift is required. This limits attendance alerts to "Unscheduled Absence," "Under Hours" and "Over Hours."
- Start Time: This is where the starting time for the employee's schedule is set.
- End Time: This is where the ending time for the employee's schedule is set.
- Duration: This field represents the length of the employee's shift in "hours and decimals" format.
- Required: If the employee fails to work the minimum number of hours specified here, the system generates an "Under Hours" alert (if enabled). This field is in "hours and decimals" format.
- Maximum: If the employee works, more than the number of hours specified here, the system generates an "Over Hours" alert (if enabled). This field is in "hours and decimals" format.
- Attendance Rule: This field maps the attendance alert configuration to the shift.
- Meal and Break Rule: Allows the user to apply a specific Meal Rule for this individual shift.
- Labor: Employee's default labor can be overridden for this individual shift.
- Comments: this field can be filled out to add specific comments for this shift.

Scheduling Multiple Shifts

If you need to add the same shift to employees for five days, you simply click and drag with your mouse to highlight the dates you wish to place a schedule.



Once the dates are highlighted let, go of your mouse and the same scheduler options above appear. The only difference is that you are placing a schedule in all dates selected.



1. Each shift that you have entered into the system is available for selection in the Shift Name drop-down menu.
2. Select the Create a Schedule for Each Day option to schedule the employee to work the selected shift on each day in the date range.
3. Select the Create a Single Schedule option to schedule the employee for one shift spanning the days in the date range.
4. By default, all options displayed are pulled directly from the selected shift. To manually specify different shift settings, click on the Override Shift icon.
5. Click on the Save icon to add the shift to the employee's schedule.

Schedule Options

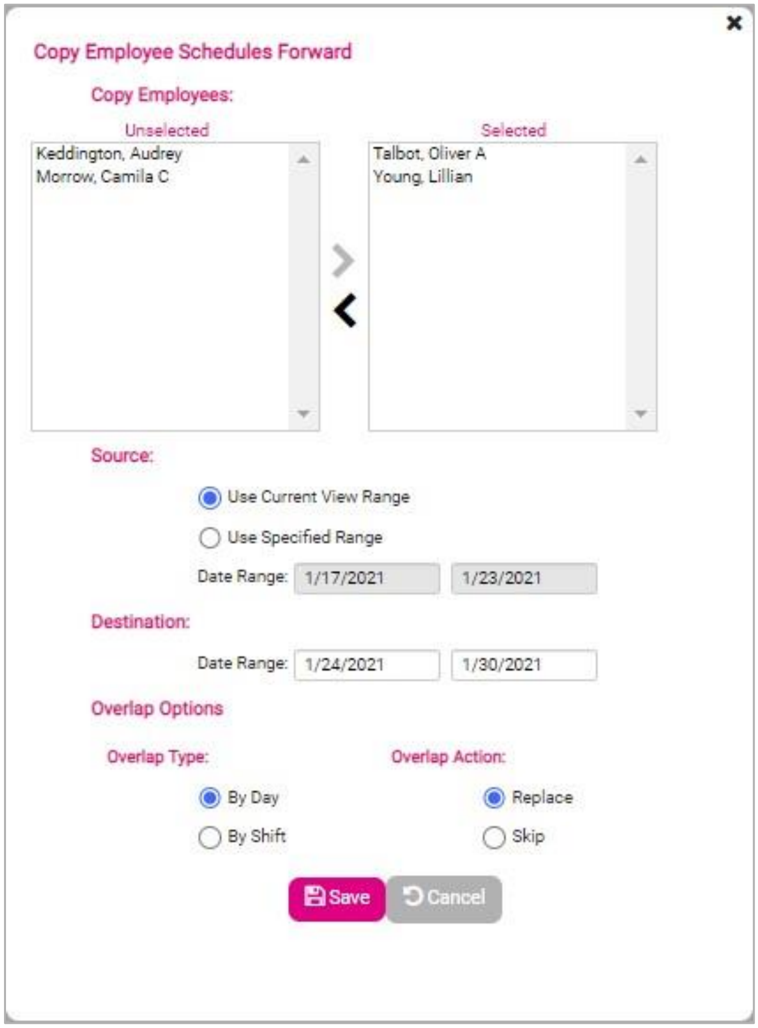
While in "Edit Mode," various options are available to assist you in creating schedules for your employees.

The header at the top of the Scheduling screen contains the following options:

1. If you have been copying/pasting schedules, the Clear Clipboard icon clears the shift information stored in the clipboard.
2. Click on the Copy Schedules icon to copy employee schedules from one date range forward to a specified range of dates.

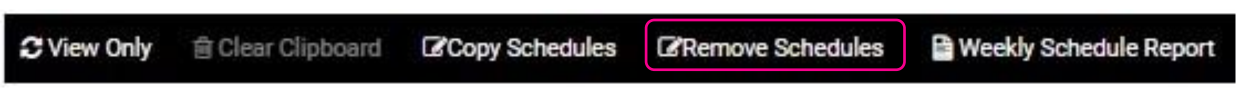
3. Select the desired employees from the unselected box, and click on the arrow icon to move them to the selected box. To select multiple employees, hold down the {CTRL} or {SHIFT} key while clicking.
4. The following Source options are available:
    - Use Current View Range: The range currently displayed on the table is selected as the source range.
    - Use Specified Range: Select this option to manually specify the source using the Date Range fields.
5. In the Destination section, enter the range of dates that you would like to copy schedules in the Source range to.
6. Overlap Options allow you to specify how you would like the system to handle any overlapping schedules that may result from the copy action.
    - Select "By Day" or "By Shift" for Overlap Type. This selection works in conjunction with the Overlap Action option.
    - Under Overlap Action, select "Replace" to replace any existing shift with the shift being copied. Select "Skip" to skip any existing shift that is encountered, leaving the original shift in place.

7. Once you have specified copy options, click on the **Save** icon. The shifts are copied as defined.

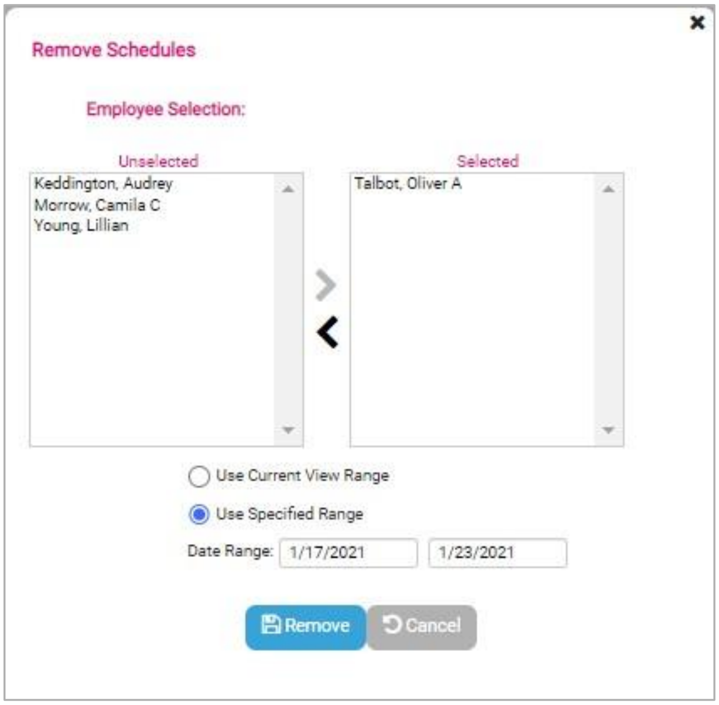


Remove Schedules Option

The remove schedules option allows you to select employees and a date range that you wish to delete the schedule from. Select the Remove Schedules button.



Once the button is selected, you can choose the employee/s schedule you wish to remove and the date range.



Weekly Schedule Report Option

This link generates a weekly schedule report based on the filtered results. This report looks similar to the scheduler’s displayed results.

Employee Name	Sun 01/17	Mon 01/18	Tue 01/19	Wed 01/20	Thu 01/21	Fri 01/22	Sat 01/23	Hours
Keddington, Audrey		10 AM to 7 PM	10 AM to 7 PM	10 AM to 7 PM	10 AM to 7 PM	10 AM to 7 PM		45.00
Morrow, Camila C		6 AM to 3 PM	6 AM to 3 PM	6 AM to 3 PM	6 AM to 3 PM	6 AM to 3 PM		45.00
Talbot, Oliver A		10 AM to 7 PM	10 AM to 7 PM	10 AM to 7 PM	6 AM to 3 PM	6 AM to 3 PM		45.00
Young, Lillian		2 PM to 11 PM	2 PM to 11 PM	2 PM to 11 PM	2 PM to 11 PM	2 PM to 11 PM		45.00
TOTAL								180.00

Employee Options

Click on the ellipsis next to any employee's name to view employee-specific scheduling options.

This area allows you to:

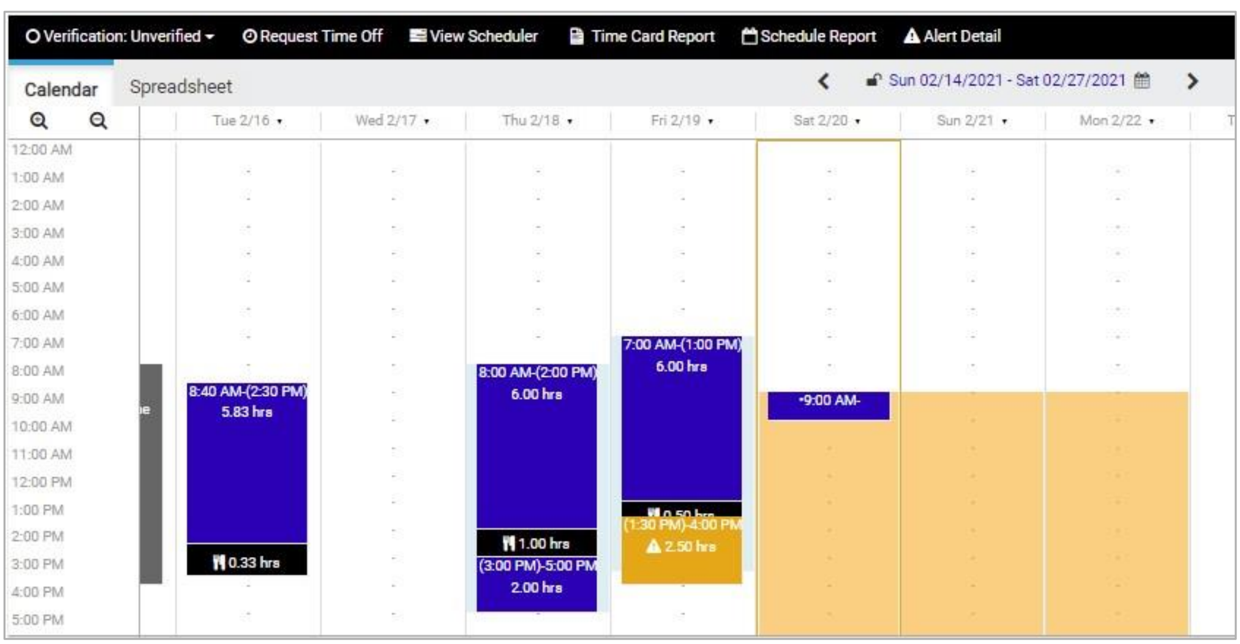
- Copy to Clipboard: Copy all schedules from the employee and paste them on another employee's schedule.
- Remove Employee Schedules; Remove all schedules from the selected employee
- Detail Copy: Allows you to copy a schedule and paste it onto multiple employees schedule at once.

Schedule Totals

Scheduled hours for each employee are totaled in the column on the far right of the Scheduler table. Daily totals for all employees are displayed across the bottom of the Scheduler table.

Time Card View

Once schedules have been created, the employee's Time Card displays the employee's schedule. Visually, the schedule appears behind all time transactions that are entered, giving the user the ability to quickly see worked time vs. scheduled time.

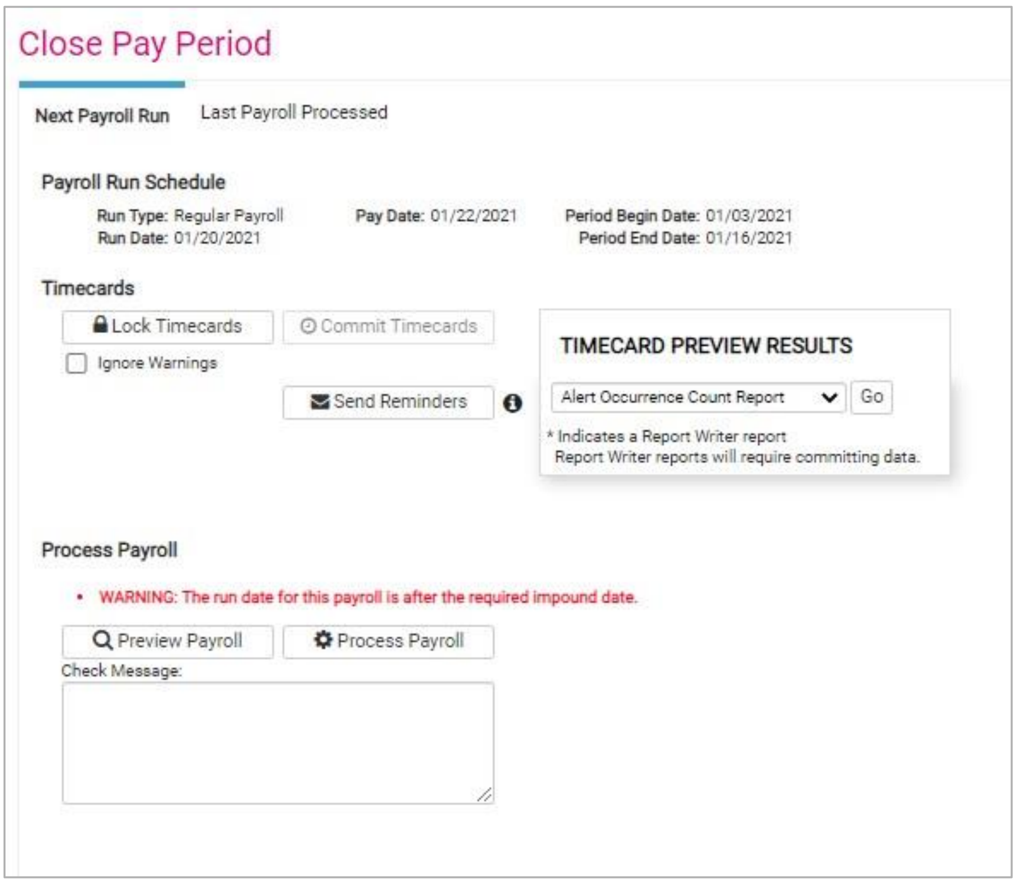


If you are using Attendance Rules in conjunction with your shifts, any alerts generated by discrepancies between employee schedules and the actual punches on their Time Card are displayed.

Click on the Schedule icon (highlighted in the above screen shot) to view a report of the employee's scheduled shifts.

Close Pay Period

When using isolved Time, a new process must be followed in order to transfer the Time Card data to the time entry grid, to preview payroll, and to process payroll. For convenience, a user is able to preview and process the payroll from the Close Pay Period area. Please follow the steps below to successfully run payroll.

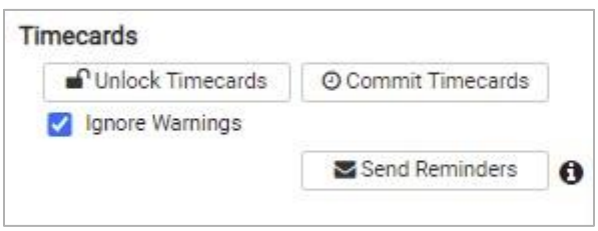


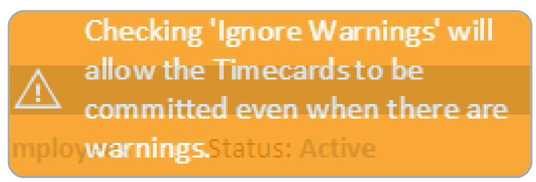
1. Run any reports for the current Time Card period by using the Time Card Preview Results area.
2. We recommend running the "Alerts Export" and "Verification Export" at a minimum before proceeding with payroll.
   Note: The "Alerts Export" report shows any alert exceptions.
3. Under the Time Cards section, click on Lock Time Cards.
   - This option finalizes the Time Cards and prevents any further editing or data manipulation by employees managers and supervisors. Keep in mind that once locked Admin users can still edit time cards.
   - This process can be undone by clicking Unlock Time Cards as long as the Time Cards have not been committed.

4. Click on the **Commit Time Cards** button.
    - This option transfers the hours from the Time Card section of isolved to the Time Entry Grid.
    - This process can be undone by clicking **Uncommit Time Cards** as long as the payroll has not been processed.
5. **Send Reminders**: This option allows you to send an email and push notification to all employees who have not verified the employee level time card verification.
6. Click on the **"Preview Payroll"** button.
7. Once the payroll preview has been run, you may run any reports for the payroll by using the **Last Preview Results** area on the right side.
8. Once any payroll reports have been verified, click on the **Process Payroll** button to finalize the payroll.

Once a payroll is processed, Time Cards may not be opened and edited without voiding the payroll. Any incorrect data should be adjusted in a future payroll once the checks have been generated.

Note: Alert Rules and Verification policies within isolved have the ability to prevent payroll from being committed when configured in a specific way. When a Time Card alert or verification policy prevents a Time Card being committed, the user sees an error warning of such a condition (example below). The user then can either fix the condition that is preventing the commit process from completing, or can suppress the warning and move forward by clicking on the **Ignore Warnings** check box as shown below, then clicking on the **Commit Time Cards** button again. This should only be done with extreme caution as the warnings are there for a reason, and should only be bypassed by a user once sufficient research is done via the Verification Export and Alerts Export have been viewed.





Reports

The following reports are available with isolved Time:

- Alerts Export
- Attendance Export
- Attendance Variance Export
- Hours Breakdown Summary
- Hours Detail Export
- Punch Detail Export
- Policy Group Eligibility Report
- Time Card Report
- Time Card Report Basic
- Time Card Audit Export
- Uncommitted Time Report
- Verification Detail Export
- Weekly Schedule Report (ran in Scheduler)