December 2022

Solved

Time, Labor & Attendance

Manager / Supervisor User's Guide



Table of Contents

Time Card	4
Time Scale	4
Time Card Date Range	4
Symbol	4
Time Card Views	5
Time Card Symbols ●	5
Punch Entry	5
Pending/Missed Punch Review	6
To review an employee submitted missing punch request on a Time Card, follow the steps below:	6
Hours Entry	7
Hours Detail Preview	8
Managing Punch/Hour Records	8
Time Card Verification	9
Requesting Time Off	9
Time Card Report	11
Schedule	11
Time Card – Preview Check	11
Employee Absence	11
Employee Absences - Search	12
Time Off Balances	13
Plan Details	13
Current Pay Period Details	14
Current Plan Year Details	14
Next Plan Year Details	15
Employee Calendar	15
Employee Calendar – View	16
Admin Calendar	
My Dashboard	19
Pending Transactions	19

•**ISOIVED** Help Docs

Manager / Supervisor User's Guide

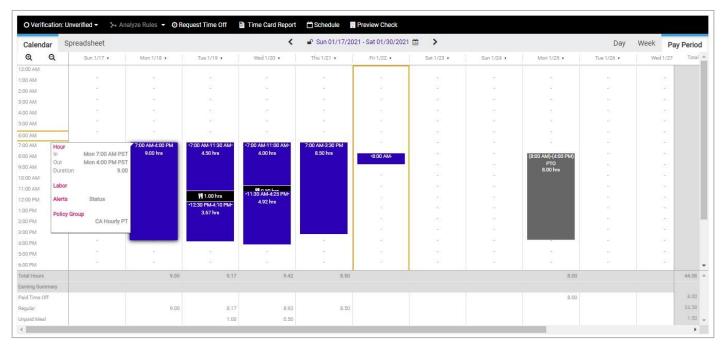
Pending Punches	
Alert Monitoring	
Employee Punch Status	
Scheduled vs. Worked Hours	
Earnings Summary of Hours	
Results	
Filters	
My Calendar and Team Calendar	
My Calendar	
Team Calendar	
Group Punching	
Manage Groups	
Group Punch	27
Applying Default Schedules	
Importing Default Schedule	
Employee Scheduler	
Screen Layout	
Creating Schedules	
Scheduling a Single Shift	
Scheduling Multiple Shifts	
Schedule Options	
Remove Schedules Option	
Weekly Schedule Report Option	
Employee Options	
Schedule Totals	
Time Card View	
Close Pay Period	
Reports	

Help Docs

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.

Manager / Supervisor User's Guide



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.



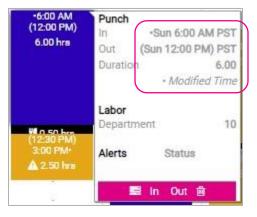
Help Docs

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.

	Punch:	01/22/2021	1:00 PM	
	Type:	Normal		~
	Mode:	Auto		~
	l	_ Do Not Round	1	
	(Do Not Round	1	
Notes				

Help Docs

Manager / Supervisor User's Guide

- 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.

🔁 Show Res	ults	💸 Analyze Rules	- O Request Tim	e Off f ∄ View Sc	heduler 📑 Time C	ard Report 🛛 👖 P	review Check
Calendar	Spre	eadsheet		<	鹶 Mon 01/31,	/2022 - Sun 02/13/:	2022 苗 >
ତ୍ର ପ୍		Sat 2/5 •	Sun 2/6 •	Mon 2/7 •	Tue 2/8 •	Wed 2/9 •	Thu 2/10 •
5:00 AM					-		
6:00 AM							
7:00 AM							
8:00 AM		Punch		Pending 7:58 AM	•8:01 AM·		
9:00 AM		In	Mon 7:58 AM				
10:00 AM		Out					
11:00 AM		Duration	0.00				
12:00 PM			Pending				
1:00 PM		Labor		•1:13 PM-	-	-	
2:00 PM							
3:00 PM		Alerts	Status				
4:00 PM							
5:00 PM		Арр	rove Reject	· ·			
6:00 PM		-				-	



Hours Entry

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

- 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.

8:00 AM	+ Add record
9:00 AM	Hour
10:00 AM	Punch
11:00 AM	Cancel

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

Start Time:	01/22/2021	9:00 AM
End Time:	01/22/2021	10:00 AM
Туре	: Normal	~
Duration	: []	
Labor Default O		
Departmen	E	~
Notes		
ſ		

- 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.



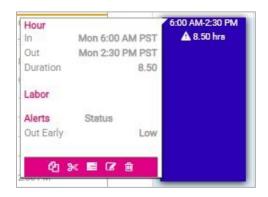
Help Docs

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.

6:00 AM-2:42 PM	Would you like to Move Copy Cancel
	-
	2

Manager / Supervisor User's Guide

Help Docs

- 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.

O Verification: Unverified → Analyze Rules → □ Employee □ Supervisor □ Manager

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.

O Verification: Unverified -	≯• Analyze Rules 👻	② Request Time Off	View Scheduler	🗎 Time Card Report	🛗 Schedule Report	Preview Check	Alert Detail
------------------------------	--------------------	--------------------	----------------	--------------------	-------------------	---------------	--------------

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

Help Docs

Manager / Supervisor User's Guide

- 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.

Request Time Off		
* Absence Policy:	[~
*From Date:	1/22/2021	
*To Date:	1/22/2021	
Start Time:		~
Days: *Hours Per Day: Hours Requested:	□ □ □ □ □ □ □ Chec	ck /
2 12 12 12 12		
Projected Balances		
After Time Off Request:		j
After Time Off Request: Current Plan Year:		
After Time Off Request:		



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.

O Verification: Unverified 🗸 🏃 Analyze Rules 👻 O Request Time Off 🗮 View Scheduler 📔 Time Card Report 🗒 Schedule Report 🗒 Preview Check 🛕 Alert Detail

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

O Verification: Unverified 🗸 🥻 Analyze Rules 👻 📀 Request Time Off 🖉 View Scheduler 🔮 Time Card Report 🛗 Schedule Report 🗒 Preview Check 🛕 Alert Detail

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.

O Verification: Unverified 🗸 🦒 Analyze Rules 🗸 🕐 Request Time Off 🖉 View Scheduler 🔮 Time Card Report 🛱 Schedule Report 🛱 Preview Check 🛕 Alert Detail

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.

Em	ployee Ab	sence	S			
From:	1/1/2021		Absence Policy:	All	~	Filter
To:	1/31/2021		Status:		~	To view records for absence policies for which you are no longer eligible, use the 'All' selection.

- 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.



Manager / Supervisor User's Guide

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

Absence Details					Comments		
*Absence Date:	Jury / Witness						
*Absence:			~				
*Hours:			1				
Start Time:	8:00	MA	~				
	Exclude From	Accrual Calcu	ulation				
		Earning Calcu					

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.

Em	ployee Ab	sence	S			
From:	1/1/2021		Absence Policy:	All	~	Filter
To:	1/31/2021		Status:		~	To view records for absence policies for which you are no longer eligible, use the 'All' selection.

- 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.

O Current Balance as of : 1	20.00	
Plan Details PTO	As of Last Pay Period End	Current Pay Period 10/25/2020 - 11/7/2020
Plan Year.	Accrued: 0.00	
Award Schedule: Per Hours Worked	Taken: 0.00	Projected Taken: 0.00
Accrual Rate: 0.0385	YTD Accrued: 0.00	
Last Award Date:	YTD Taken: 0.00	Projected YTD Taken: 0.00
Service Date: 10/20/1978		Time Off Requests-Pending Approval: 0.00
Length of Service: 42 Years, 2 Months	Balance: 120.00	Projected Balance: 120.00
(506 Months)	Current Plan Year 11/8/2020 - 12/19/2020	Next Plan Year 12/20/2020 - 12/18/2021 Carryover from Previous Plan Year: 120.00
	Time Off Requests-Approved: 0.00 Time Off Requests-Pending Approval: 0.00	Time Off Requests-Approved: 0.00 Time Off Requests-Pending Approval: 0.00

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

Help Docs

Manager / Supervisor User's Guide

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.

Help Docs

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:

N I at the state of the	E. E. S. S. E. S.	Self Service	. The second		
N = N = N = N = N = N = N = N = N = N =	h = m m m m m m m m m m m m m m m m m m	SOIT SORVICO	\times I Imo \times	-mmn/n/n	I SIODAAL
					Cale lual.

Employee Calendar						♀ Help →
My Calendar Team Calendar My	Absences Coverage Requests					
🛛 Request Time Off 🗎 Unavailabili	ty 🟥 Request Shift					
< > today Print Calend	ar		January 2021			month week day
Sun	Mon	Tue	Wed	Thu	Fri	Sat
2	7 7:00 AM - 3:30 PM	29 300 PM - 11:30 PM Untrailable 1000 PM - 2:50 PM	30 7:00 AM = 3:30 PM	31 7:00'AM - 3:30 PM	New Year's Day 1	2
	3 Approved PTO - Full Time (8:00Hrs)	5 Unavailable 1:00 PM - 2:30 PM Approved PTO - Full Time (8.00Hrs)	6 07:00AM-03:30PM 7:00 AM-3:30 PM	7:00AM-03:30PM 7:00 AM - 3:30 PM	8 7:00 AM - 3:30 PM 7:00 AM - 3:30 PM	9
1	D 11	12 Unavailable 1:00 PM - 2:30 PM	13	14	15	16

- 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
 - 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

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.



Help Docs

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.

Request Time Off		
*Absence Policy:		~
*From Date:	1/22/2021	
*To Date:	1/22/2021	
Start Time:		~
Days:	S M T W T F S	eck A
*Hours Per Day:		
Hours Requested:		
Projected Balances		
Projected Balances After Time Off Request:		ļ
ASSISTANCE (CASCESCIE) STUDIES		
After Time Off Request:]

Employee Calendar - View

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

11	12	13	14	15 Pending Unpaid Time Off (8.00Hrs)
18 6:00 AM - 3:00 PM	19 5 AM to 3 PM 6:00 AM - 3:00 PM		21 5 AM to 3 PM 6:00 AM - 3:00 PM	22 Dvetridden 8:00 AM - 5:00 PM
25 Approved Jury / Witness (8.00Hrs)	26	27	28	29

Help Docs

Manager / Supervisor User's Guide

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:

Ay Calendar Team Caler	ndar My Absend	coverage Reque	sts		
om:	Absence Poli	cy: All	✓ Filter		
То:	Stat	us:	To view records for abs you are no longer eligib		
> Date	Absence Policy		≑ Status	\$ Hours	Estimated Available Hours
/25/2021	Jury / Witness		Approved	8.00	
/15/2021	Unpaid Time Off		Pending	8.00	
🗊 Delete 🟾 🎜 Refresh					
Delete CRefresh			Comments		
	1/25/2021		Comments		
Absence Details *Absence Date:	1/25/2021 Jury / Witness				
Absence Details *Absence Date:	Jury / Witness				
Absence Details *Absence Date: *Absence:	Jury / Witness 8.00	AM 🗸			

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.

Help Docs

Admin Calendar

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

alendar Pending Requests	Thatony					
c > today Refresh Dat			January 2021			month week da
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	7 28				New Years Day 1	
:	3 4	5	6	7	8	
11	0 11	12	13	14	15 Pending: 1 Aria Miller	
1: Approved: 1 Pexton Carlson	7 18	19	20	21	22	
24	4 25 Approved: 2 Carla A Garcia Aria Miller	26	27	28	29 Approved: 1 Charlotte L Russon	
3		2		4	5	

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

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

Admin Calendar	V Help -
Calendar Pending Requests History	
< > today Refresh Data	February 2021 month week day

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

nsaction 2 of 2	Previous	Next ►	Approves 🗸	Process	View List		
Aria Miller			Approves Rejects	07 Veekly		Status: Hire Date	Active 10/20/1978
Date	Absence	Policy		Hours		Start Time	Estimated Balance
1/15/2021	Unpaid	Time Off		8.00		8:00	
Comme	ents:	Vacation					

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.

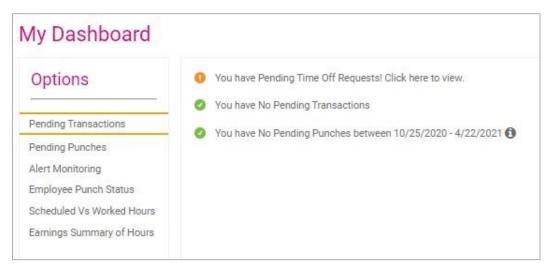


My Dashboard

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.

My Dashboard													isol	lved University
Options	Filtered: Sf	tatus (Active), Pu	nch Status (Pe	nding), Start D	ate (2/6/2022), E	nd Date (2/27/2	2022)							T Filter
Pending Transactions	≑ All	Status	\$ TCID	≑ EEID	# Employee	Date/Time	≑ Type	\$ Mode	\$ Organiza	Departm	Notes	\$ Status C	\$ Status C	\$
Pending Punches		Pending		1015	Benjamin,	02/07/202	Normal	Auto				isolvedt3st	02/08/202	
Alert Monitoring Employee Punch Status														



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.

	Filtered: Status (Active	e), Start Date (01/15/2021	, End Date (01/21/2021)										T Filter
Options	Policy Group: ANY	~	Worked Labor ANY	~	Status	Active	~	Manager:	ANY	v	EE Group: ANY	~	
Pending Transactions	Pay Group: ANY		Labor Value: ANY	~	EE Type			Supervisor:		~			
ending Punches	Severity: ANY	~	Alert Type: ANY	~	Start Date:	1/15/2021		End Date:	1/21/2021				
Alert Monitoring	Search:		Apply	Reset									
mployee Punch Status													

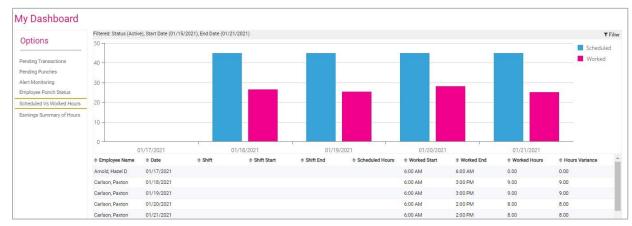
Employee Punch Status

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.

Options	Filtered	d: Status (Active), Manage	r (Ethan Money)												Y Filte
	Poli	cy Group: ANY	✓ We	orked Labor:	ANY	~	Status:	Active	~	Manager:	Ethan Money	► EE Group:	ANY	~	
Pending Transactions	Pa	y Group: ANY	v I	Labor Value:	ANY	~	EE Type:	ANY	~	Supervisor:	ANY	~			
Pending Punches		Type: ANY	~	Mode:	ANY	~									
Alert Monitoring		Search:			Apply	Reset									
Employee Punch Status		Employee Name	o Date/Tim	ne	© Type	Mode		Location	Departr	ment	Medicare Job	o Patients	Manager	Supervisor	
Scheduled Vs Worked Ho		Garcia, Carla A	02/20/202	1 09:00 AM	Normal	In			20				Money, Ethan		View
Earnings Summary of Hou	٠	Thompson, Carter A			Absent	Scheduled							Money, Ethan		View
	•	Walker, Jackson L			Absent	Scheduled							Money, Ethan		View

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.

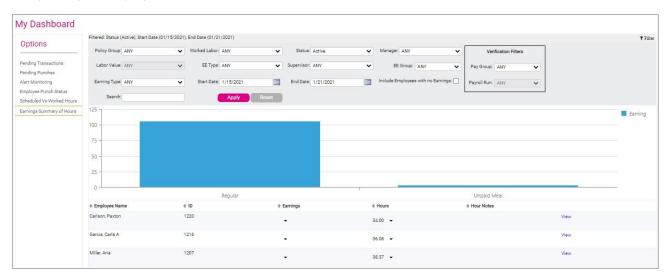


-solved

Help Docs

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
 - o Orange=Medium Alerts
 - o 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.

Employee Calendar						0 Help +
My Calendar Team Calendar My	Absences Coverage Requests					
Request Time Off Unavailabilit Today Print Calendar			January 2021			
			-			month week day
Sun 27	Mon	Tue 29	Wed 30	Thu 31	Fi New Year's Day 1	Sat 2
	7:00 AM - 3:30 PM	800 PM-1150 PM Univallable 1.00 PM - 2:30 PM	7.00 AM + 3:30 PM	7.00 AM - 3:30 PM		
3	Approved PTO - Full Time (8.00Hrs)	Unavailable 1:00 PM - 2:30 PM	6 07:00AM-03:30PM 7:00 AM - 3:30 PM	7 07:00AM-03:30PM 7/00 AM - 3:30 PM	8 07:00AM-03:30PM 7:00 AM - 3:30 PM	9
	PTO - Full Time (8.00Hrs)	1:00 PM - 2:30 PM Approved PTO - Full Time (8.00Hrs)	7:00 AM - 3:30 PM	7:00 AM - 3:30 PM	7:00 AM - 3:30 PM	
10	11	12 Unavailable 1:00 PM - 2:30 PM	13	14	15	16

- Assigned shifts are displayed for each day the employee is scheduled. The following is displayed:
 - o Shift Colors
 - o Shift Name
 - o Shift Start and End Times
 - o "Manual," "Overridden" and "Default" schedule assignments
 - o 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 > >



Help Docs

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



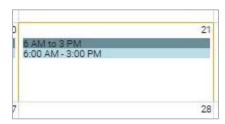
- Black-out days are displayed according to employee assignment, and are shown with a GREY background.
- o Shifts are displayed before "Pending" transactions.
- o "Pending" transactions are displayed before "Approved" items.
- o "Pending" transactions are displayed after "Holiday" names.
- "Approved"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

1.

• The "Approved" transaction bar is **PURPLE** with white text.

	25
Approved Jury / Witness (8.00Hrs)	

- 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.



Help Docs

Manager / Supervisor User's Guide

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

Employee Calendar		Ş Help →
My Calendar Team Calendar My Absences Coverage Requests		
🕐 Request Time Off 📋 Unavailability 🛱 Request Shift		
< > today Print Calendar	February 2021	month week day

Team Calendar

Click on the **Team Calendar** tab.

Employee Calendar					🖓 Help 🗸
My Calendar My Absences Coverage Requests					
< > today Print Calendar		January 2021			month week day
Sun Mon	Tue	Wed	Thu	Fi	Sat
27 2				New Years Day 1	2
3	4 5	6	7	8	9
10 1	1 12	13	14	15 Pending: 1 Aria Miler	16
17 1	8 19	20	21	22	23
24 2 Approved: 1 Aria Miller	5 26	27	28	29 Approved: 1 Charlotte L Russon	30
31			.4		6

- 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.

알 E	than Money - 🛛 🖡
Em	ployee View
~	Manager View
ñ	Home
¢	My Account
4	User Preferences
	Electronic Consent
?	University
	Logout

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.

+ Ad	ld New 🕜 Edit 🗎 D	elete 🛿 Refresh 📲 Save	e D Cancel	
Emp	ployee Groups			
	*Group Name:	Hardware Group		
	Policy Group	Employee ID	Employee Name	Department
	CA Hourly PT	1216	Garcia, Carla A	20
	CA Hourly PT	1215	Thompson, Carter A	20

- 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.

Help Docs

Manager / Supervisor User's Guide

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

Manage Groups	
Group Name	Employee Count
Hardware Group	2

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.

Con	pany: Michael's Time Co	mpa 🗸									
		Policy Group: A	INY 🗸	Labor Field: ANY	✓ Status:	Active 🗸	Manager: ANY	~			
C	Group: ANY	Pay Group: A	JNY 🗸	Labor Value: ANY	🗸 🛛 EE Type:	ANY 🗸	Supervisor: ANY	~			
S	earch:		Apply Reset								
	Policy Group	Employee ID	Employee Name	Location	Department	Medicare Job	Patients	o Manager	Supervisor	_	
	Policy Group Hourly - Scheduler	Employee ID 1216	Employee Name Garcia, Carla A	Location	Department 20	Medicare Job	Patients	 Manager Money, Ethan 	Supervisor	View	
	111 March 1970 To Constant State				11722532810708243	Medicare Job	Patients	11 Debising for Theme	Supervisor	View View	

- 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.



- Help Docs
 - 8. Click on the Save icon to create the punch for the specified employees.

Punch		
Tunen.	1/22/2021	02:46 PM
Type:	Normal	~
Mode:	Auto	~
Do N	lot Round	
beperentente.	Not Assigned	
Labor Default Override		
Labor Default Override Department		~

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.

+ Add New	🕼 Edit	🖻 Delete	C Refres	ih 🖪	Save	Cancel
Default Sch	hedules					
	*Schedule R	ule: 21 Da	ay Rotation			~
	*Effective D	ate: 1/22	/2021	#		
					Previ	ew

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.

-solved

Help Docs

Importing Default Schedule

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

Schedule	er Impor	t				
→ Next						
Import File				Import Options		
	*Import Type:	Employee Default Schedules	~	Note: Default Company & Pay Gro	up will be used if none is provided in th	e file.
	*Template:	Default	~	*Default Company:	Michael's Test Co	~
	*File Format:	Spreadsheet (Excel)	~	*Default Pay Group:	Bi-Weekly	~
	*Attach File:			*Import Key:	Employee Number	~]

The required columns and format are as follows:

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

Scheduler										
Itered: Status (Active)										T
Policy Group: ANY	← Home Labor Field: ANY	~	Status: Active	~	Manager: ANY	~	EE Group ANY	~	Search:	
Pay Group: ANY	✓ Home Labor Value: ANY	~	EE Type: ANY	~	Supervisor: ANY	~	Team: ANY	~		Apply Reset

• 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.

-solved

Help Docs

- 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 dropdown 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.

iltered: Home Labor (Departmer	nt), Home Labor Value (25 - Techr	nical Support), Status (Active)						T
Schedule By Employee								
🖹 Clear Clipboard 🛛 🗎 W	eekly Schedule Report							
howing results 1 - 4 of 4	li.						Previou	
Scheduler			<	Sun 01/17/2021 - Sat 01/23/2021	>		Hours 🗸	Days 🗸 🛛 Mon
	Sun 1/17	Mon 1/18	Tue 1/19	Wed 1/20	Thu 1/21	Fri 1/22	Sat 1/23	Total
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
		10:00 AM - 7:00 PM	10:00 AM - 7:00 PM	10:00 AM - 7:00 PM	10:00 AM + 7:00 PM	10:00 AM - 7:00 PM		
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
		6:00 AM - 3:00 PM	6:00 AM - 3:00 PM	6:00 AM - 3:00 PM	6:00 AM - 3:00 PM	6:00 AM - 3:00 PM		
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
		10:00 AM - 7:00 PM	10:00 AM - 7:00 PM	10.00 AM - 7:00 PM	6:00 AM - 3:00 PM	6:00 AM - 3:00 PM		
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
		2:00 PM-11:00 PM	2:00 PM - 11:00 PM	2:00 PM - 11:00 PM	2:00 PM - 11:00 PM	2:00 PM - 11:00 PM		
								-
Total								180.00
Grand Total								180.00

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.

Help Docs

Manager / Supervisor User's Guide

4. Select Save.

Schedule			Comments	
Employee Name:				
Shift Name:	10 AM to 7 PM	~		
	Override Shift			
	📃 Open Shift			
* Start Time:	1/23/2021	10:00 AM		
*End Time:	1/23/2021	7:00 PM		
*Duration:	9.00			
Required:				
Maximum:				
Attendance Rule:	Hourly Attendar	nce 🗸 🗸		
Meal/Break Rule:		~		
Labor				
Department:		*		
	Save Do	ancel 🗙 Delete		

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.



Help Docs

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.

Mon 2/27	Tue 2/28	Wed 3/1	Thu 3/2	Fri 3/3

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.

Employee Name: I	Keddington, Audrey	6		
Shift Name:	10 AM to 7 PM		~	
	Override Shift			
	Open Shift			
*Start Time:	1/23/2021	10:00 AM		
*End Time:	1/23/2021	7:00 PM		
*Duration:	9.00			
Required:				
Maximum:				
Attendance Rule:	Hourly Attendance	e	~	
Meal/Break Rule:			~	
oor				
Department:			~	

- 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:

3	View Only	自 Clear Clipboard	Copy Schedules	Remove Schedules	🗎 Weekly Schedule Report
s.I					
	lf you have l clipboard.	been copying/pastin	ig schedules, the Clea	ar Clipboard icon clears th	ne shift information stored in th
<u>)</u> .	Click on the range of da		on to copy employee s	schedules from one date	range forward to a specified

- 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.



1	oyees:				
Unselec Keddington, Audrey Morrow, Camila C		^ >	Talbot, Oliv Young, Lilli		*
Source:	O Use Cur	*	Range		*
	-	cified Rar	140.2070.00		
	Date Range:	1/17/2	021	1/23/2021	í .
Destination	E		1-1		-
	Date Range:	1/24/2	021	1/30/2021	
	tions				
Overlap Op				1000000	
Overlap Op Overlap Ty	/pe:		Overlap	Action:	
	vpe:		Overlap	Action:	
			Overlap		

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.





Manager / Supervisor User's Guide

Employee Selection:			
Unselected Keddington, Audrey Morrow, Camila C Young, Lillian	•	Selected Telbot, Oliver A	*
	Current Viev	Papas	÷
0	Specified Ra		
	nge: 1/17/2		

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

Weekly Schedule Report Option

C View Only	會 Clear Clipboard	Copy Schedules	Remove Schedules	B Weekly Schedule Report
-------------	-------------------	----------------	------------------	--------------------------

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		45.00				
Morrow, Camila C	\$	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		45.00				
TOTAL								180.00



Help Docs

Employee Options

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

Garcia, Carla A	Employee Options Copy To Clipboard Remove Employee Schedules Detail Copy View Time Card Cancel
Thompson, Carter A	I

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.

Calendar	Spreadsheet	 Sun 02/14/2021 - Sat 02/27/2021 						
Q Q	Tue 2/16 •	Wed 2/17 •	Thu 2/18 🔹	Fri 2/19 🔹	Sat 2/20 •	Sun 2/21 •	Mon 2/22 •	
2:00 AM			1					1
:00 AM	13	-	8	8		18	0.00	
:00 AM	82	25	12	8	8	12		
:00 AM	8t	12	*	12	<i>\$</i> 7	6		
:00 AM	13	-	8	89	81	18	0.00	
00 AM	82	25	10	84	87	12		
00 AM	8t	53	8	12	<i>1</i> 2	13	10.00	
00 AM	24	25	*	7:00 AM-(1:00 PM)	23	12		
00 AM		22	8:00 AM-(2:00 PM)	6.00 hrs	8	8	3.000	
00 AM	8:40 AM-(2:30 PM)	-	6.00 hrs	A CONTRACTOR OF THE OWNER OF THE	•9:00 AM-			
0:00 AM	e 5.83 hra	2						
1:00 AM		15						
2:00 PM		-						
00 PM		2		10 50 bra				
00 PM		15		(1:30 PM)-4:00 PM				
00 PM	0.33 hrs	-	1.00 hrs (3:00 PM)-5:00 PM	A 2.50 hrs				
00 PM		25	2.00 hrs	and the second s				
00 PM								

Manager / Supervisor User's Guide

Help Docs

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.

ext Payroll Run Last Payr	roll Processed		
ayroll Run Schedule			
Run Type: Regular Payro Run Date: 01/20/2021	II Pay Date: 01/22/2	021	Period Begin Date: 01/03/2021 Period End Date: 01/16/2021
imecards			
Lock Timecards	O Commit Timecards		
Ignore Warnings			TIMECARD PREVIEW RESULTS
	Send Reminders	0	Alert Occurrence Count Report 🗸 Go
			* Indicates a Report Writer report Report Writer reports will require committing data.
rocess Payroll			
	for this payroll is after the rec	quired	impound date.
	for this payroll is after the rec	quired	impound date.
WARNING: The run date		quired	impound date.
• WARNING: The run date Q Preview Payroll		quired	impound date.
• WARNING: The run date Q Preview Payroll		quired	impound date.

- 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.

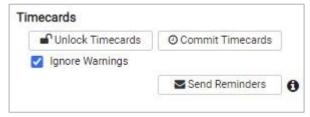
Manager / Supervisor User's Guide

Help Docs

- 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 <u>employees</u> 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.



Checking 'Ignore Warnings' will allow the Timecards to be committed even when there are loywarnings.Status: Active

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)