

# TimeClockPlus® Manager Essentials

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# Overview of Menu Bar

## **Hours**

### Individual Hours

Individual Hours allows you to review, edit, and resolve hours/segments/shifts for one employee at a time.

### Group Hours

Group Hours allows you to review, edit, and resolve hours/segments/shifts for all of your employees.

### Time Sheets

Time Sheets allows you to add projected hours or leave for an employee or group of employees when they are out of the office unexpectedly and timesheets are due.

## **Employee (HR Use Only)**

### Employee Profiles (HR use only)

Employee Profiles builds the employee into the system. This functionality is completed at the HR level. Please contact HR for needed adjustments.

### Employee Roles (HR use only)

Employee Roles assigns the employees E-Class. This functionality is completed at the HR level. Please contact HR for needed adjustments.

### Dashboard Templates (HR use only)

Dashboard Templates assign the dashboard that the employee sees depending if they are salary or hourly. This functionality is completed at the HR level. Please contact HR for needed adjustments.

### Global Modification (HR use only)

Global Modification allows changes made to a global selection of employees or functionalities within the system. This functionality is completed at the HR level. Please contact HR for needed adjustments.

### Employee Messaging (HR use only)

Employee Messaging lists messages that have been sent to employees within TCP. We will not be using this functionality as it is not the official means of communication for UNM.

## **Reports**

### Period Reports

Period Reports allows you to create, customize, print, and save reports on your employee hours. They can be customized to show information on select or all employees, and can be printed and/or downloaded in HTML, PDF, or OpenXML formats.

### Scheduler Reports (Not used)

Scheduler Reports allows Manager/Supervisors to create, customize, print, and save reports on employee schedules across a given period. We do not utilize the schedule functionality of TCP.

# Tools

## Employee Status

The Employee Status screen allows managers to monitor employees in real time. From this screen, you can see which employees are clocked in and which are clocked out. You can also see what time the employee clocked in.

**All Tab:** Allows the user to view every employee they have access to and their status (in or out).

**Clocked In Tab:** Shows the employees who are clocked in and they time they clocked in.

**On Break Tab:** Shows the employees who are currently on meal break, the time they went on break, and the duration of the break.

**Not In Tab:** Shows employees that are not currently clocked in.

**Absent Tab:** Not used, as we do not use schedules.

**On Leave Tab:** Shows each employee currently clocked into a leave code as well as any shift notes about that segment.

**Last Punch Tab:** Shows each employee, their status, their last clock in/out.

**Hours Tab:** Shows each employee, their hire date,\* the amount of hours worked today, the amount of hours worked this week, their status (in/out), and the time of the employees last clock in/out.

\*Not necessarily the date of hire, but the date they were entered in the TCP system.

## Request Manager

The Request Manager allows the user to view and approve any time-off requests that have been submitted by employees either through the WebClock (computer) or on a Remote Terminal (wall clock). Additionally, employee time-off requests can be manually added through this feature.

# Resetting your Manager Password

## Manager Password Reset

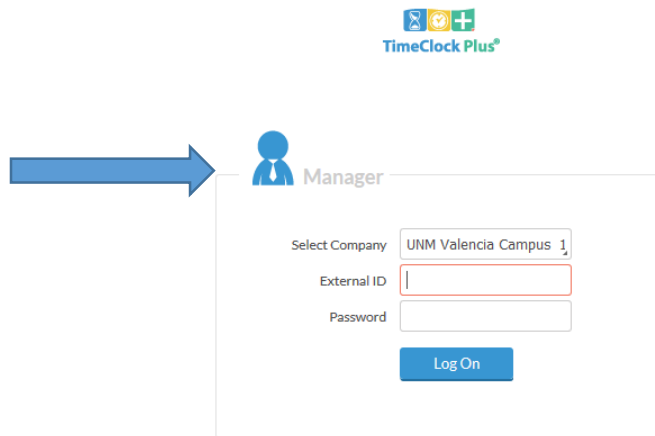
1. Log in to the TCP Manager portal using your User ID and the default password (available from HR).
2. Click on your name in the top right hand side of the page.
3. Choose "My Options."
4. Click on the "Password" tab.
5. Enter your current password, your new password, re-enter password, then click the "Update" button.

# Manager Functions

## Hours – Individual and Group Hours (Approving Time)

Individual Hours allows you to review, edit, and resolve hours/segments/shifts for one employee at a time. Group Hours provides a process for managers to review and approve hours for multiple employees per screen. Please note that although you can see segments for approval from the “Required Approval” widget on the Dashboard, you should only approve segments through Hours/Individual Hours or Hours/Group Hours. It is important that you view each segment as it relates to the time for the week, instead of individually.

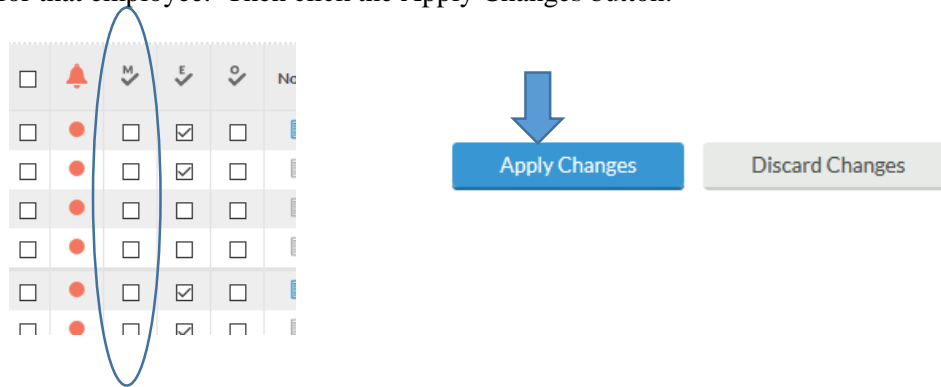
1. Launch TimeClock Manager (use provided link).
2. Log in using your User/Manager (net) ID and password, not your employee (Banner) ID.



3. From the Employee menu, choose Individual Hours or Group Hours.
  1. If you choose Individual Hours, you must then select an employee.
    1. Select from the list of employees displayed by clicking on their name; or
    2. Type a name in the search bar, and wait for the list to populate. Then, click on the name in the list.
  2. The functionality between Individual or Group is the same from this point on. The pictures in the examples below will use Group Hours.
4. Enter a Start and End date and click Update.

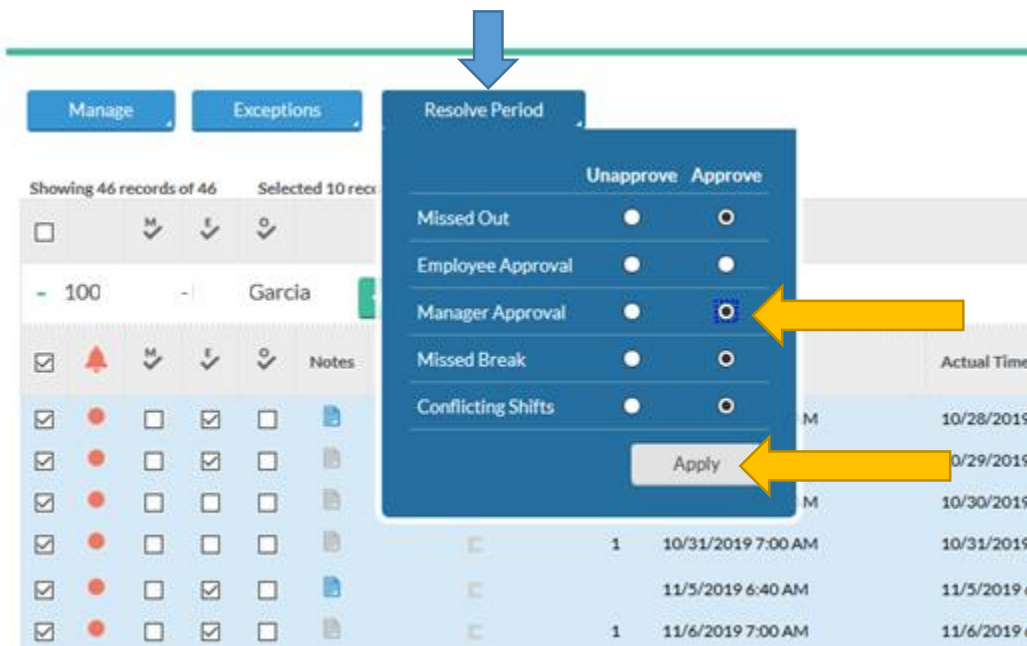
### GROUP HOURS ☆

5. Review the time for each employee. You need to check for:
  1. Employee approval of hours (noted by checkmark in “E” column).
  2. At least 40 hours each week (full-time employees).
  3. A meal break of at least 30 minutes after the sixth hour worked.
  4. Shift/segment/hour conflicts
  5. Any exceptions that need attention will be shown in the “Bell” column in orange.
  
6. Resolve any exceptions such as missed breaks, conflicting shifts, and missed clocks. (See Edit Hours in this SOP.)
  1. Shift/segment/hour conflicts are orange circles in the bell column. Resolved items are blue circles.
  
7. Approve (signature equivalent) the adjusted/final time by one of these methods:
  1. Click on each individual box to the left of each date/hours under the M-Checkbox column for that employee. Then click the Apply Changes button.



Or:

2. Select all the segments/shifts/hours by clicking the box on the top left box column for a particular employee, then click Resolve Period, the Approval Button for Manager Approval, then Apply. **IMPORTANT:** This method approves the segments/shifts/hours for all of your employees, even if you only have boxes for one employee selected. Be sure to resolve all issues for all employees prior to using this method.



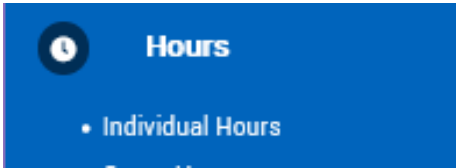
Approved time will show in green, conflicts in orange. Hovering over the circle will tell you what the exceptions are and what approvals are still needed.



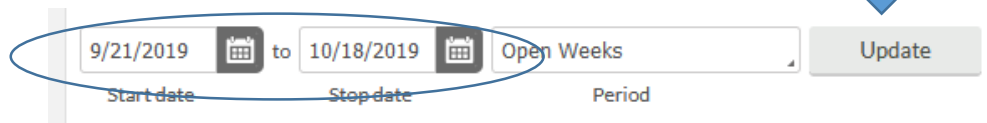
# Edit Hours

Edit Hours allows Managers/Supervisors to edit (correct) hours for an employee. Use steps one through seven for all transactions, then move on to the specific instructions as it applies. **Please note that you may forward an employee's request for correction to their time to Valencia Human Resources, note that the change is approved in the email, and we will make the correction for you.**

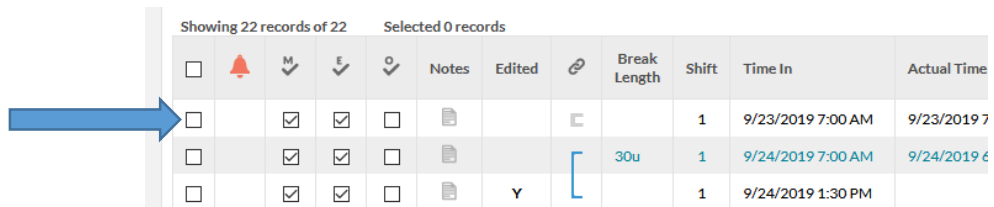
1. Login to TimeClock Plus using your manager login and password. (Same as computer login.)
2. Select Dashboard or hit enter.
3. Click on Hours, then Individual Hours.



4. Select the employee from the list, or by using the search feature.
  - a. If using the Search feature, be sure to click on the name after it appears in the list.
5. Adjust your start and stop date as needed, then click the Update button.

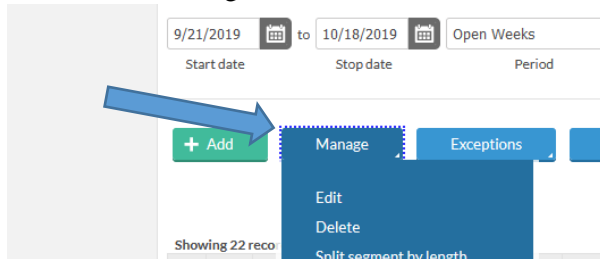


6. Click on the selection box next to the date and time segment (hours) that need to be adjusted.

A screenshot of a table with 12 columns: checkboxes, icons, 'Notes', 'Edited', 'Break Length', 'Shift', 'Time In', and 'Actual Time'. A blue arrow points to the first checkbox in the second row.

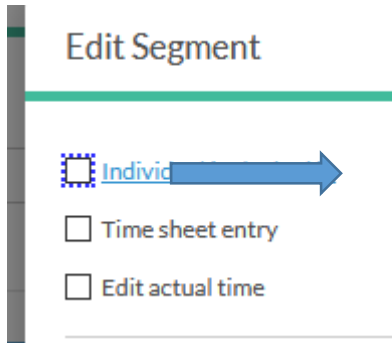
Showing 22 records of 22		Selected 0 records									
<input type="checkbox"/>					Notes	Edited		Break Length	Shift	Time In	Actual Time
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					1	9/23/2019 7:00 AM	9/23/2019 7:00 AM
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				30u	1	9/24/2019 7:00 AM	9/24/2019 6:00 AM
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Y			1	9/24/2019 1:30 PM	

7. Click on the Manage button. Select edit.

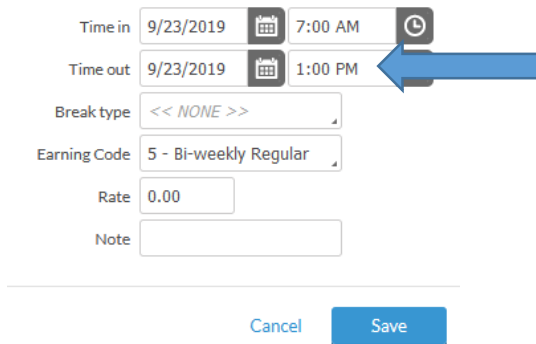


### Clocking the employee out

1. Click the “Individual is clocked in” button. The Time out segment on the right will then appear.



2. Click on the time segment for Time out and enter the corrected time, using the rounded time.



3. Never check the “edit actual time” button.
4. Click Save.

### Correcting the clock in or out time

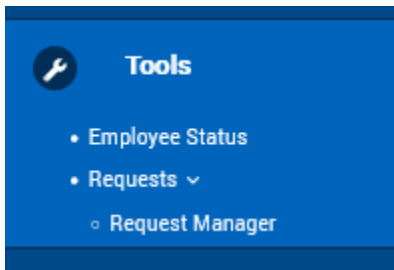
1. Click on the time segment that needs to be corrected.
2. Key in the correct time. NOTE: Enter the rounded time, not the actual time, using the rounding chart.
3. Click Save.

# Approving Leave (Request Manager)

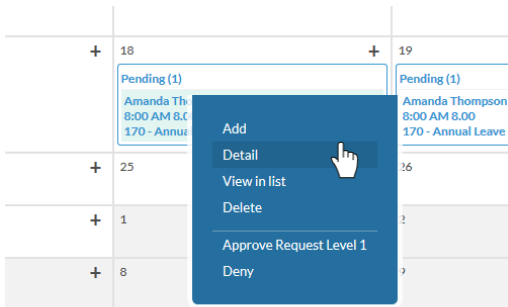
The Request Manager allows the user to view and approve any time-off request that have been submitted by employees, or add a request. Please note that accruals **will not** be kept in TCP. Employees must check their balances through Employee Dashboard in MyUNM, and supervisors through HR Reports (as authorized). Following are the steps to approve/deny requests by logging into TCP. However, you may also approved/deny requests by clicking on the links provided in the email notification and following the prompts.

## Approving/Denying a Request

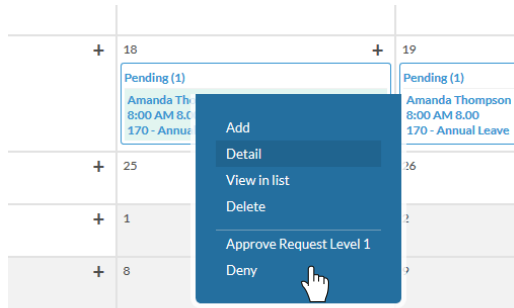
1. Browse to **Tools > Requests>Request Manager**.



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

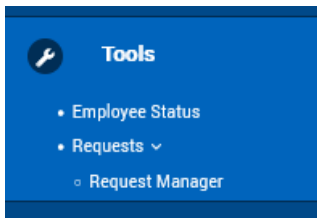


- To approve or deny a request, right-click on any request and select either the **Approval Level** needed or **Deny**.



### Adding a Request through Request Manager

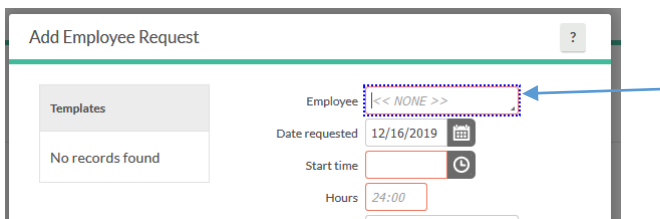
- Browse to **Tools > Requests>Request Manager**.



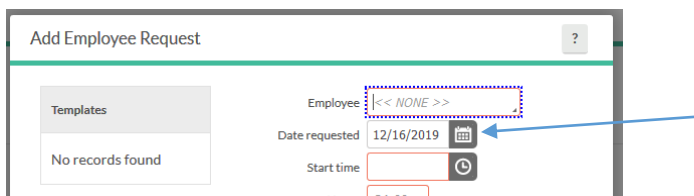
- Click the **Add** button to the left of the name of the calendar month, or the plus key (+) in the right hand of the box for a specific date.



- Select the employee you are adding the request for in the **Employee** field.



- Enter the date of the time-off request, an anchor time, the amount of hours requested off, and the leave type.



4. Enter the time the leave will begin under Start Time.

The screenshot shows the 'Add Employee Request' form. On the left, there is a 'Templates' section with 'No records found'. The main form fields are: Employee (dropdown menu with '<< NONE >>'), Date requested (calendar icon, value 12/16/2019), Start time (text input field with a clock icon, highlighted with a red box and a blue arrow pointing to it), and Hours (text input field with value 24:00).

5. Enter the number of hours that will be used on that day.

The screenshot shows the 'Add Employee Request' form. The Start time field is now filled with a time value. The Hours field (text input) is highlighted with a red box and a blue arrow pointing to it, containing the value '24:00'.

6. If a full day, and more than one day, enter the number of days.

The screenshot shows the 'Add Employee Request' form. The Hours field is filled with '24:00'. The Days field (dropdown menu) is highlighted with a red box and a blue arrow pointing to it, showing the value '1'.

7. Select the appropriate leave code.

This is a close-up of the form fields. The 'No records found' box is on the left. The fields are: Start time (text input with clock icon), Hours (text input with value 24:00), Days (dropdown menu with value 1), and Leave Code (dropdown menu with value '<< NONE >>', highlighted with a red box and a blue arrow pointing to it).

8. Enter a description, if needed.

This is a close-up of the form fields. The fields are: Hours (text input with value 24:00), Days (dropdown menu with value 1), and Description (text input field, highlighted with a red box and a blue arrow pointing to it).

9. Click **Save**.

Cancel Save

# Reports

Scheduler Reports – Non-applicable, as we do not use this functionality in the software.

## Period Reports

The Period Reports screen is where you can create, customize, print, and save reports on your employee hours. These reports can be customized to show information on select employees, and can be printed and/or downloaded in HTML, PDF, or OpenXML formats.

## Configuring and Running a Report

1. Select the report you would like to run from the **Period Reports** screen (**Reports > Period Reports**).
2. Apply any desired **Employee** and **Job Code Filters** by clicking the respective buttons at the top of the screen.
3. Enter in the date range for the report, or select a pre-defined date range from the drop-down.
4. Click on **Settings** to change individual facets of the report. These settings are unique to each report.
5. If you would like to change the font, spacing, or page orientation used on the report, click on **Page Layout** at the bottom of **Settings**.
6. If you have customized the report, click **Save** to commit these changes and return to the **Period Reports** screen.
7. Click **Preview** to see an example report and make sure that it includes all of your criteria.
8. Click on the **Download** button to choose which output format you would like to download.

TimeClock Plus® produces three types of output:

- **HTML**: The output is produced in a .html file that can be opened by a web browser.
- **PDF**: The output is produced in a .pdf file that can be opened in Adobe reader or another program designed to read .pdf files. As the .pdf report is more difficult to edit than the other formats, many companies use this for producing reports to send out.
- **OpenXML**: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice Calc.

## What If?

### What if the employee forgot to clock in for the day, out for the day, in for lunch, or out to lunch?

Instruct the employee to clock in or out, depending on their situation. The system will ask them for their missed clock time, which you will approve when reviewing their time.

### What if the employee took a lunch break, but did not clock out for the lunch break?

Have the employee send you an email indicating they forgot to clock out for their lunch break with the time they should have clocked out and back in. Forward that email to timekeeping, noting that it is approved, and we will make the adjustment in TCP for you.

### Employee forgot to project time and time is due?

If the employee is on campus, have the employee complete the steps to project and approve the projected time. Approve the time as Manager. If the employee is off campus, and will not be back until after payroll deadline, please email the projected time to timekeeping. We will enter the projections for you. Adjustments can be made once the employee is back.

### Employee is sick and timesheets are due?

Contact timekeeping. They will give you instructions based on the amount of time until payroll deadline.

Employee hasn't approved time and timesheets are due?

Contact timekeeping. They will give you instructions based on the amount of time until payroll deadline.

Employee forgot to submit leave request

If the week has not been closed, have the employee submit the leave request through regular procedures, then approve the leave as appropriate. If the week has already been closed, please contact timekeeping for further instructions.

Manager approved leave verbally but not in TCP

If the week has not been closed, have the employee submit the leave request through regular procedures, then approve the leave as appropriate. If the week has already been closed, please email timekeeping, noting the approved time.