



# **Timeclock Plus Editor/Supervisor Manual**

## **MSD of Washington Township**



# Timeclock Plus Supervisor/Editor Manual

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12/2021



## Timeclock Plus Supervisor/Editor Manual

This manual will enable you to:

- See who's clocked in/out
- Add/Delete/Edit employee time segments
- Fix missing clock in/out and conflicting time segments
- Approve/deny leave requests (Supervisor rights only)
- Review all employee hours weekly
- Approve employee hours weekly (Supervisor rights only)
- Utilize geo-fencing to see the GPS location of employee clock in/out (Transportation Department Only)
- Create helpful reports

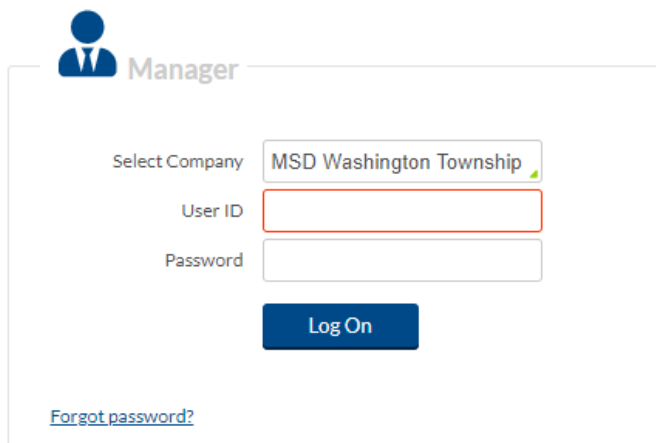
### Log on to Manager Website:

<https://185479.tcplusondemand.com/app/manager/#/ManagerLogOn/185479>

It is recommended to add the log on page to your favorites on your browser or create a shortcut on your desktop.

**User ID:** Your first initial and last name

**Password:** First and Last initials in CAPS + last 6 digits of your SSN + !  
ex. JL123456!



The screenshot shows the Manager Log On interface. At the top left is a blue person icon and the word "Manager". Below this are three input fields: "Select Company" with a dropdown menu showing "MSD Washington Township", "User ID" with a red border, and "Password". A blue "Log On" button is positioned below the password field. At the bottom left, there is a blue link that says "Forgot password?".



# Timeclock Plus Supervisor/Editor Manual

## My Dashboard

The Dashboard is the control center for Timeclock Plus. The widgets, which are the boxes shown below, are tools to assist in tasks that need to be done. The widgets have links to pre-filtered lists to make corrections or approvals.

The screenshot shows the TimeClock Plus dashboard interface. On the left is a blue sidebar menu with a search bar and navigation items: My Dashboard, Hours, Schedules, Employee, Reports, Tools, and Company. The main content area is titled 'My Dashboard' and contains four widgets: MISSED PUNCHES (0), CONFLICTING SEGMENTS (0), OVERTIME (1), and Employee Status. The Overtime widget includes a table with columns for Name, Type, and Date, and a 'Jump to Group Hours' link. The top right of the dashboard shows the user account 'Dan Mayora' and a 'Log out' button. Annotations include a yellow circle around the menu button (1), a yellow circle around the sidebar menu (2), a yellow circle around the 'Jump to Group Hours' link (3), and a yellow circle around the user account box (4).

Name	Type	Date
AARON SMITH	Overtime	10/06 8:30A - 4:30P

Name	ID	Clock Status
AARON SMITH	5105	Out
ANDREW BROWN	95064	Out
DIANA JUAREZ	95460	Clocked In
MATTHEW NEIGHBORS	90351	Clocked In
NATHANIEL HART	92185	Clocked In

1. **Menu Button** – Displays the normally hidden side bar / menu.
2. **Side Bar (menu)** – Hidden menu is displayed by clicking on the home button.
3. **Jump To Links** – Click the blue text in each widget to go directly to pre-filtered reports to make corrections/approvals.
4. **User Account Box** – click on your name and a drop down menu appears with the option to “Log Out”. Click on the purple “Log Out” button.



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## Breakdown of a Time Segment

When an employee clocks in/out or has leave time approved, a time segment is created in Timeclock.

				Notes	Edited		Break Length	Time In	Actual Time In
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y			4/19/2021 08:00 AM	4/19/2021 08:00 AM
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				30u	4/20/2021 08:00 AM	4/20/2021 08:02 AM

Time Out	Actual Time Out	Hours	Shift Total	Week Total	Position
4/19/2021 04:00 PM	4/19/2021 04:00 PM	8:00	8:00		2 - PRSN BUS
4/20/2021 04:30 PM	4/20/2021 04:30 PM	8:00	8:00		205 - Clerical

(The two pictures above are actually one time segment but enlarged to show detail)

- Bell Icon** – Important notifications like manager approval needed.
- “M”** – Has the segment been approved? A checkmark indicates that it has been approved.
- Notes** – Will be highlighted in blue if any notes have been applied to this segment including notes entered by the employee. Click on the blue piece of paper to see the notes.
- Edited** – If segment is edited, a “Y” will appear. Click on the “Y” for details.



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Break Length

- 5. **30u Break Length** – Automatic lunch breaks are taken out for worked segments but dependent upon the position and number of hours worked consecutively.

Time In	Actual Time In
4/19/2021 08:00 AM	4/19/2021 08:00 AM

- 6. **4/20/2021 08:00 AM 4/20/2021 08:02 AM Time In-Out/Actual Time In-Out** – Timeclock records both actual time and rounded time. MSD Washington Township follows federal guidelines of the 7 minute rounding rule whereby the system rounds to the nearest quarter hour.

Hours	Shift Total	Week Total
8:00	8:00	40:00*

- 7. **Hours, Shift Totals and Week Total** – Hours and Shift Hours show the amount of hours for each time segment. The Week Total is the total for the week which only shows up on the last time segment. The district week starts Monday and ends Sunday.

Position

2 - PRSN BUS

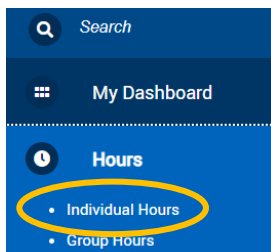
- 8. **205 - Clerical Position** – Shows which job or leave code the segment will be charged to, such as clerical or personal illness.

## Managing Employee Time

The purpose of managing employee time is to make sure the employees are recording their time accurately thus being paid correctly.

### Adding Employee Time

- 1. **Click on Hours—Individual Hours on the blue menu bar.**





## Timeclock Plus Supervisor/Editor Manual

2. Select the employee by typing the employee name in the Search field then click on the magnifying glass or click on the employee's name.

INDIVIDUAL HOURS

Sort by: ID ↑ Employee

Search

Showing 2 records of 2

156 [REDACTED]

90920 MICKEY MOUSE

3. You can add either a time segment or a leave segment. Employees are to enter their own leave requests unless unable to do so (for instance, the employee is out sick on Friday and Monday with Payroll being due on Monday). If adding a leave segment, check the employee's accrual bank (leave balances and leave types) by selecting the "Accruals" tab. Click on the "Hours" tab to get back to time segments. (The accrual time is in HOURS and not days. To find the balance in days, you will divide the leave balance by the employee's scheduled hours worked per day. When the absences are imported into the Payroll system, the absences are converted to half or full days. For instance, if a 6 hour/day employee requests 3 hours (or less) of illness, the absence would show as 1/2 day of illness in the payroll system. Likewise, if the employee requests 4, 5 or 6 hours of illness, the employee would be charged a full day.)

Hours Schedules **Accruals**

A [REDACTED]

Select forecast date 7/19/2021  Update

Showing 3 records of 3

Ledger	Accrual Bank↑	Accrued	Accrual Forecast	Used	Used Forecast	Expired	Expired Forecast	Remaining
<input type="checkbox"/>	Family Illness	24.0000	0.0000	0.0000	0.0000	0.0000	0.0000	24.0000
<input type="checkbox"/>	Personal Business	16.0000	0.0000	0.0000	0.0000	0.0000	0.0000	16.0000
<input type="checkbox"/>	Personal Illness	344.0000	0.0000	0.0000	0.0000	0.0000	0.0000	344.0000



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4. To add a time or leave segment, click on the **+ Add** button and you will get the pop-up window below.

The screenshot shows a search bar with 'mouse' and a red 'X' icon. Below it, a list shows '90920 MICKEY MOUSE'. To the right, there are tabs for 'Hours', 'Schedules', and 'Accruals'. A date range is set from '6/28/2021' to '7/11/2021'. At the bottom, there are buttons for '+ Add', 'Manage', and 'Exc'.

5. Are you entering a complete time segment or clocking someone in?
- a. To add a complete time segment:
- i. Enter the date and time next to the Time In and Time Out. You can use the calendar to select the date but manually enter the time.
  - ii. To specify the job code worked for this shift, go to the Position codes and a dropdown menu will show up. Choose the appropriate code (this also works for adding a leave segment).
  - iii. A note is required to close the segment. Once the note has been added, click on the “Save” button.

The 'Add' window shows a 'Segment Length: 8:00'. On the left, there are checkboxes for 'Individual is clocked in', 'Time sheet entry', 'Missed in punch', and 'Missed out punch'. The main form has fields for 'Time in' (4/27/2021 9:00 AM), 'Time out' (4/27/2021 5:00 PM), 'Break type' (<< NONE >>), 'Position' (215 - Mechanic), 'Rate' (0.00), 'Substitute for' (<< NONE >>), and 'Note'. A 'Days' dropdown is set to '1'. At the bottom, there are 'Extra', 'Cancel', and 'Save' buttons.





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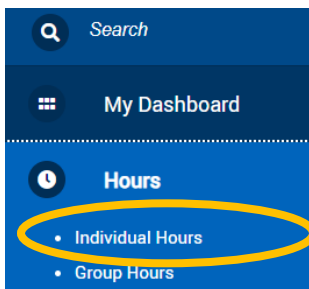
### b. *To clock an employee in:*

- i. Put a check in the box for “Individual is clocked in”. If this is a result of a missed punch, then check the box for “Missed in punch”.
- ii. Fill in the date and the time.
- iii. Select the position code for the shift.
- iv. A note is required to save the segment. Once the note has been added, the press “Save” button.

The screenshot shows the 'Add' form for clocking an employee in. The 'Individual is clocked in' checkbox is checked and circled in yellow. The form includes fields for Time in (7/7/2021, 9:00 AM), Time out (<< Clocked In >>), Break type (<< NONE >>), Position (215 - Mechanic), Rate (13.37), and a Note field. There are also buttons for 'Extra', 'Cancel', and 'Save'.

## Editing and Deleting Employee Time

### 1. Go to Hours—Individual Hours on the blue menu bar.



2. Select the employee by either typing the employee name in the Search field then click on the magnifying glass or click on the employee’s name.



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## INDIVIDUAL HOURS



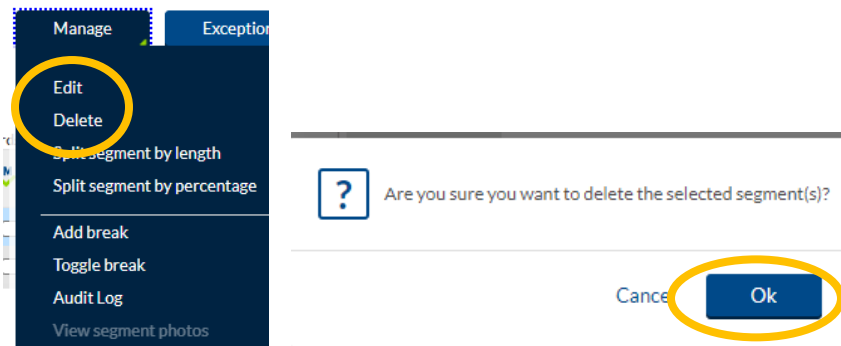
3. Put a check in the box in the far left column of the segment you want to edit or delete then click the **Manage** button.



Showing 2 records of 2      Selected 1 records       Show absences      Req 17

<input type="checkbox"/>					Notes	Edited		Time In	Actual Time In	Time Out	Actual Time Out	Hours	Shift Total	Week Total	Position
<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		7/6/2021 09:00 AM	7/6/2021 09:00 AM	7/6/2021 05:00 PM	7/6/2021 05:00 PM	8:00	8:00		215 - Mechanic
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		7/7/2021 06:30 AM	7/7/2021 06:30 AM	7/7/2021 04:00 PM	7/7/2021 04:00 PM	9:30	9:30	17:30	215 - Mechanic

4. To edit a time segment, choose the “Edit” button. To delete a time segment, choose the “Delete” button. If choosing the delete button, the message below will appear. Confirm by clicking on the “OK” button. **\*\*Note: You can’t edit a segment with manager approval. You may need to unapproved the segment first.**





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5. When choosing to edit a time segment, you can change the date, time and position code. It is essential to put a comment in the “Note” field as to why you are editing this segment. Once done, click on the “Save” button.

The screenshot shows the 'Edit Segment' form. On the left, there are several checkboxes: 'Individual is clocked in', 'Time sheet entry', 'Edit actual time', 'Missed in punch', and 'Missed out punch'. The main form area contains the following fields: 'Segment Length: 8:00', 'Time in' (7/6/2021, 9:00 AM), 'Time out' (7/6/2021, 5:00 PM), 'Break type' (<< NONE >>), 'Position' (215 - Mechanic), 'Rate' (13.37), 'Substitute for' (<< NONE >>), and 'Note'. At the bottom, there are three buttons: 'Extra', 'Cancel', and 'Save'. Yellow circles highlight the 'Time in', 'Time out', 'Position', and 'Save' buttons.

6. If an employee works through their lunch break, you will need to disable that break. Choose segment and select “Edit” as shown above, then click on “Extra” button on the far left of the Edit Segment box

This screenshot is identical to the one above, showing the 'Edit Segment' form. The only difference is that a yellow circle highlights the 'Extra' button at the bottom left of the form.



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7. Click on the box next to the “Disable automatic deduction for this segment” then hit “Save.”

Extra Information ? Feedback

---

**Punch in information**

Application TimeClock Manager - Manage Hours Individual  
Location 209.160.199.119  
Description N/A

**Punch out information**

Application TimeClock Manager - Manage Hours Individual  
Location 209.160.199.119  
Description N/A

---

**Overtime**

Do not force overtime  
 Force overtime 1  
 Force overtime 2

**Calculations**

**Disable automatic deduction for this segment**  
 Disable segment minimum

---


Cancel **Save**

## Managing Missed Punches and Conflicting Time Segments

Missed punches occur when an employee fails to perform a clock operation, either for clocking in or out for a shift. Conflicting time segment occur when there is an overlap of time on two or more time segments. Both missed punches and conflicting time segments must be resolved before approving the segments.

### Missed Punches

1. On your Dashboard, you have a widget called “Missed Punches”. If any employee has a missed punch, they will be listed in this widget. To correct the missed punch, click on [Jump to Group Hours](#).

 **MISSSED PUNCHES** 1\* ?

1/1

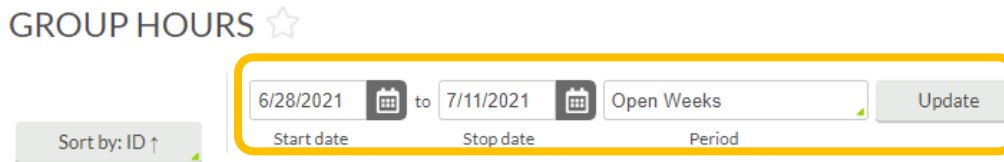
Name	Type	Date	✓
A [redacted] EY	Missed Out	04/07 8:30A - << Missed >>	✓

[Jump to Group Hours](#)

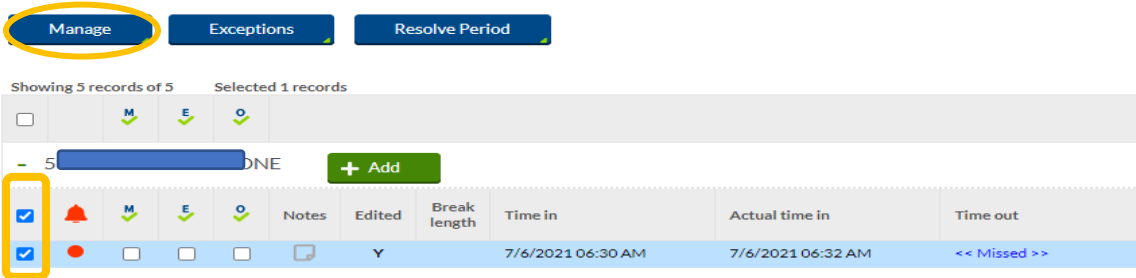


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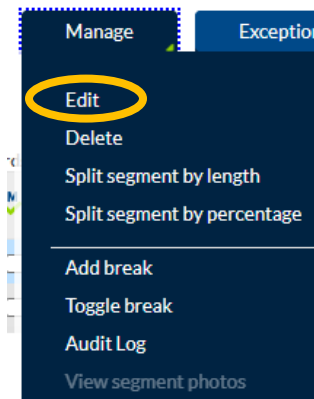
## 2. Set Begin/End Dates then click “Update”.



## 3. Put a check in the box in the far left column of the segment you want to edit or delete then click the “Manage” button.



## 4. Select Edit.





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- 5. LONGER THAN 6 HOURS:** If there is a missed punch that needs to be edited and the resulting shift will be longer than 6 hours, simply double click the segment and edit the segment by entering the correct time into the “Time in” or “Time Out” box, add a note as to the reason, and click save.

Edit Segment ? Feedback

Segment Length: 0:00

Individual is clocked in  
 Time sheet entry  
 Missed in punch  
 Missed out punch

Time in 12/1/2021 12:45 PM  
Time out 12/1/2021 12:45 PM

Break type << NONE >>  
Position 204 - Childcare  
Cost Code << NONE >> Select

Labor Codes 0 Manage  
Rate 0.00  
Substitute for << NONE >> Select

Note

Extra Cancel Save

- 6. LESS THAN 6 HOURS:** If there is a missed punch that needs to be edited and the resulting shift will be less than 6 hours, you will need to edit the segment by **first** selecting “Edit Actual Time”, then adjusting the “Time In” or “Time Out” and Add a reason for the edit in the “Note” text box. Click the Save button

Edit Segment ?

Segment Length: 3:42

Individual is clocked in  
 Time sheet entry  
 Edit actual time  
 Missed in punch  
 Missed out punch

Time in 12/14/2021 10:00 AM  
Time out 12/14/2021 1:42 PM

Break type << NONE >>  
Position 202 - Bus Driver  
Cost Code << NONE >> Select

Labor Codes 0 Manage  
Substitute for << NONE >> Select

Note Forgot to clock in

Extra Cancel Save



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7. Double-click the segment to edit it and this time DO NOT check the “Edit Actual Time” check box. Edit the same timestamp you did before. This will update the “rounded” time that the system uses to calculate the hours for the segment. Click Save.

Segment Length: 3:45

Individual is clocked in

Time sheet entry

Edit actual time ← 1

Missed in punch

Missed out punch

Time in 12/14/2021 10:00 AM ← 2

Time out 12/14/2021 1:45 PM ← 2

Break type << NONE >>

Position 202 - Bus Driver

Cost Code << NONE >> Select

Labor Codes 0 Manage

Substitute for << NONE >> Select

Note

Extra Cancel Save ← 3

8. On the following pop-up, click OK (keeping the actual times). At this point, the segment will be correct.

Edit Action

You are editing rounded times. Which action should be taken on the actual times?

**Rounded times**

Time in 12/14/2021 10:00 AM

Time out 12/14/2021 1:45 PM

**Actual times**

Time in 12/14/2021 10:00 AM

Time out 12/14/2021 1:42 PM

Keep actual time(s) ← 1

Edit actual time(s)

Remember my current selection

Cancel Ok ← 2

	Notes	Edited	Time In	Actual Time In	Time Out	Actual Time Out	Hours		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Y	C	12/14/2021 10:00 AM	12/14/2021 10:00 AM	12/14/2021 1:45 PM	12/14/2021 1:42 PM	3:45

9. **IMPORTANT: In Timeclock, an employee who forgets to clock out will automatically be clocked out once the time is over 12.5 hours. If this occurs, the**



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system generates a “Missed Punch”. If an employee is actually working over 12.5 consecutive hours in one day, they will be clocked out as a missed punch and should contact you to adjust their hours.

## Conflicting Segments

1. On your Dashboard, you have a widget called “Conflicting Segments”. If any employee has conflicting segments, they will be listed in this widget. To correct the conflicting segments, click on [Jump to Group Hours](#).

**CONFLICTING SEGMENTS** 2

2/2

Name	Type	Date
MICKEY MOUSE	Conflicting Shifts	04/16 9:00A - 1:00P
MICKEY MOUSE	Conflicting Shifts	04/16 12:00P - 5:00P

[Jump to Group Hours](#)

2. Set Begin/End Dates then click “Update”.

GROUP HOURS ☆

Sort by: ID ↑

6/28/2021 to 7/11/2021 Open Weeks

Start date Stop date Period

3. Put a check in the box in the far left column of the segment you want to edit (or may need to delete) then click the “Manage” button.





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Manage Exceptions Resolve Period

Showing 2 records of 2 Selected 1 records

- 90920 - MICKEY MOUSE + Add

		M	E	O	Notes	Edited	Break length	Time in	Actual time in	Time out	Actual time out	Hours	Week total	Position
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		7/7/2021 06:30 AM	7/7/2021 06:30 AM	7/7/2021 12:00 PM	7/7/2021 12:00 PM	5:30		215 - Mechanic
<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		7/7/2021 09:00 AM	7/7/2021 09:00 AM	7/7/2021 05:00 PM	7/7/2021 05:00 PM	8:00	13:30*	7 - LWOP

4. To edit a time segment, choose the “Edit” button. To delete a time segment, choose the “Delete” button. If choosing the delete button, the message below will appear. Confirm by clicking on the “OK” button Double click on the time segment that needs to be corrected.

Manage Exception

- Edit
- Delete
- Split segment by length
- Split segment by percentage
- Add break
- Toggle break
- Audit Log
- View segment photos

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

Cancel Ok

5. If you need to edit the time segment, you can change the date, time and position code. It is essential to put a comment in the “Note” field as to why you are editing this segment. Once done, click on the “Save” button. Change the clock in/out time as needed.



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Edit Segment ? Feedback

---

Segment Length: 8:00

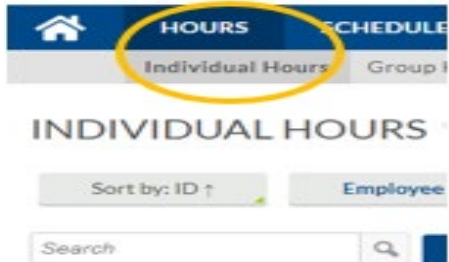
<input type="checkbox"/> Individual is clocked in <input type="checkbox"/> Time sheet entry <input type="checkbox"/> Edit actual time	<div style="border: 2px solid orange; padding: 5px; margin-bottom: 5px;">Time in 7/6/2021  9:00 AM </div> <div style="border: 2px solid orange; padding: 5px; margin-bottom: 5px;">Time out 7/6/2021  5:00 PM </div> Break type << NONE >> Position 215 - Mechanic Rate 13.37 Substitute for << NONE >> <span>Select</span> Note <input type="text"/>
---	---

Extra Cancel Save

## Geo-Fencing

Geo-fencing allows the supervisor to see the GPS location of an employee when they use their Timeclock mobile app to clock in/out (not all employees are granted permission to use the Timeclock mobile app).

- To see the location of where an employee has clocked in/out using the Timeclock mobile app, go to Hours—Individual Hours on the blue menu bar.**



- Select the employee by either typing the employee name in the Search field then click on the magnifying glass or click on the employee's name.**



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## INDIVIDUAL HOURS

Sort by: ID ↑ Employee

Search

Showing 2 records of 2

156 [REDACTED] (A)

90920 MICKEY MOUSE

3. Double click on the segment you want to view.

is	Ⓜ	Time In	Actual Time In	Time Out	Actual Time Out	Hours	Shift Total	Week Total
	Ⓜ	4/16/2021 03:15 PM	4/16/2021 03:22 PM	4/16/2021 03:30 PM	4/16/2021 03:31 PM	0:15	0:15	0:15

4. If an employee used their mobile application, next to the “Extra” button will be the “Location” button on the lower left-hand side of the pop-up window. Click on “Location”.

Edit Segment ? Feedback

Segment Length: 0:15

Individual is clocked in

Time sheet entry

Edit actual time

Missed in punch

Missed out punch

Time in 4/16/2021 3:15 PM

Time out 4/16/2021 3:30 PM

Break type << NONE >>

Position 215 - Mechanic

Rate 0.00

Substitute for << NONE >> Select

Note


Extra Location Cancel Save

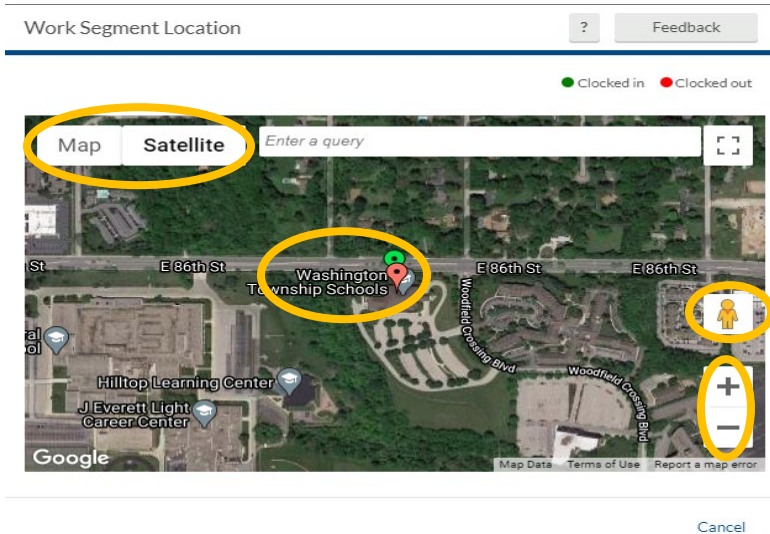
5. You will see:

- a. **Markers**—The green marker indicates where the employee clocked in and the red marker indicates where the employee clocked out.



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- b. **Map and Satellite**--The default is “Map” but “Satellite” shows buildings and minor roads.
- c. **+ and – buttons**--Click on the + and – signs to zoom into the area or zoom out.
- d. **** --called Pegman and located on the right side of the pop-up box. This allows you to see street views of the clock in/out.



## Managing Time Off Requests

, approve and deny employee time off requests. Time off requests are submitted by the employee.

Request Manager allows supervisors to view, add, edit, approve and deny employee time off requests. Time off requests are submitted by the employee.

### Approving/Denying Time Off Requests (Supervisors Only)

1. **To reach leave requests, you have 2 options:**
  1. **On your Dashboard under the “Pending Time Off Request”, choose the “Jump to Request Manager”. <OR> On the toolbar, click on Tools>Request Manager.**



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EMPLOYEE REPORTS TOOLS COMPANY Requests Other Tools

Import Export Employee Status Requests Other Tools

Matching 6 of 6 Employees Refresh Edit

0 CONFLICTING SEGMENTS 0

0 EMPLOYEE STATUS

PENDING TIME OFF REQUEST 1

Name	Date	Request		1/1
MICKEY MOUSE	4/22	JURY DTY - 8:00 AM to 12:00 PM	X	✓

[Jump to Request Manager](#)

**2. By default, employee requests will be visible in a Calendar view. In order to view employee requests in a sortable list, select the List tab.**

REQUEST MANAGER ☆

Calendar List

Status

Requests per calendar day 10 Apply

Manage << < April 2021 > >>

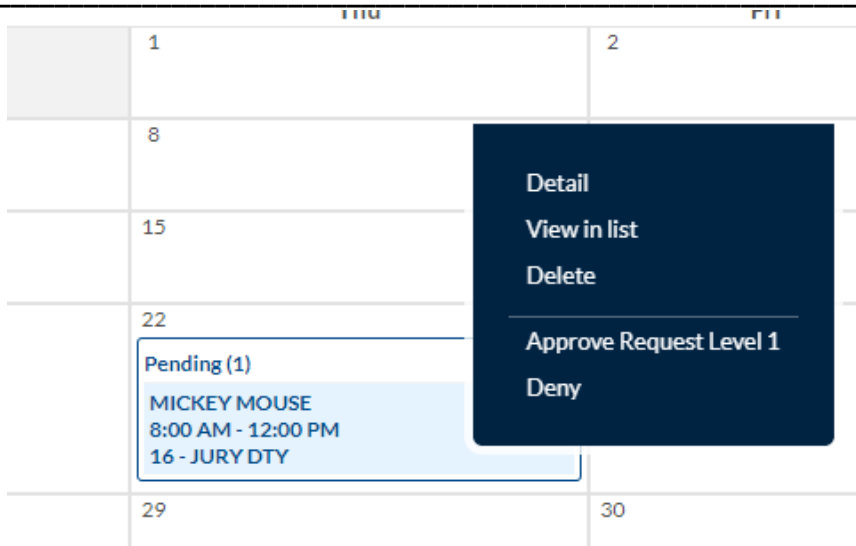
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24

Pending (1)  
MICKEY MOUSE  
8:00 AM - 12:00 PM  
16 - JURY DTY

**3. Right click on the pending request. This pop-up window appears and you can delete, approve as Request Level 1, deny the request or view details.**



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**4. Once request is approved, the segment drops into the employee’s hours and the leave hours are automatically approved.**

M	E	D	Notes	Edited		Time In	Actual Time In	Time Out	Actual Time Out	Hours	Shift Total	Week Total	Position
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		4/22/2021 08:00 AM	4/22/2021 08:00 AM	4/22/2021 12:00 PM	4/22/2021 12:00 PM	4:00	4:00	4:00	16 - JURY DTY

## Editing Requests Submitted by Employee

**1. The Detail Screen lets you know when the leave was requested and allows you to edit the leave request by clicking on the “Edit” button.**

### - Information

Employee	MICKEY MOUSE	Days	1/1	<input checked="" type="button" value="Edit"/>
Hire date	09/15/2015	Date requested	04/22/2021 (8:00 AM - 12:00 PM)	
Date submitted	04/20/2021	Leave Code	16 - JURY DTY	
Time submitted	2:58 PM	Hours	4:00	
Entered by	MICKEY MOUSE	Accrual Bank	No Accrual Bank	

### + Approvals

**2. Employees who have Personal Illness, Personal Business, Family Illness (if applicable) and Vacation (if applicable) leave codes will have a start and end balance called accruals. There may be a time that an employee leave request puts them over their available balance and the leave code will need to be changed. On the absence detail screen,**



## Timeclock Plus Supervisor/Editor Manual

click on **View Accruals** to see the balance for that leave code. By selecting the **Edit** button, you can fix the request or have the employee go back in and change the leave code before approving.

**(IMPORTANT: **Accrual balances** are shown in HOURS and NOT in days in Timeclock. To find the balance in days, you will divide the leave balance by the employee's scheduled hours worked per day. When the absences are imported into the Payroll system, the absences are converted to half or full days. For instance, if a 6 hour/day employee requests 3 hours (or less) of illness, the absence will show as ½ day of illness in the payroll system. Likewise, if the employee requests 4, 5 or 6 hours of illness, the employee would be charged a full day.)**

Information

Employee	MICKEY MOUSE	Days	1/1	<b>Edit</b>
Hire date	04/01/2021	Date requested	07/09/2021 (8:00 AM - 4:00 PM)	
Date submitted	07/07/2021	Leave Code	2 - PRSN BUS	
Time submitted	3:19 PM	Hours	8:00	<b>View Accruals</b>
Entered by	MICKEY MOUSE	Accrual Bank	2-Personal Business	

- You can edit the date, start time, hours and leave code. Add a note under Description and then click OK.**

Edit Employee Request

Templates  
No records found

Employee MICKEY MOUSE [90920]  
Date requested 7/9/2021  
Start time 8:00 AM  
Hours 8:00  
Leave Code 2 - PRSN BUS  
Description Out of town  
 Send user notification

Accruals Cancel **Ok**

- On this example, the leave code was changed to leave-without-pay. Click the "Save" button to keep the change that was made.**



# Timeclock Plus Supervisor/Editor Manual

Employee Request Detail ? Feedback

[Expand all](#) [Collapse all](#)

**- Information**

Employee: MICKEY MOUSE	Days: 1/1	<span>Edit</span>
Hire date: 04/01/2021	Date requested: 07/09/2021 (8:00 AM - 4:00 PM)	
Date submitted: 07/07/2021	Leave Code: 7 - LWOP	
Time submitted: 3:19 PM	Hours: 08:00	
Entered by: MICKEY MOUSE	Accrual Bank: No Accrual Bank	<span>View Accruals</span>

+ Approvals

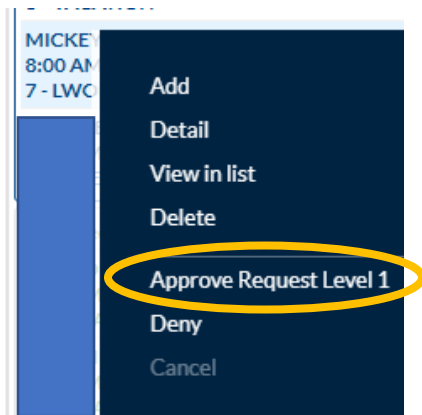
+ Notes

+ Options

Cancel Save

5. To approve, right click on the segment and choose “Approve Request Level 1”. The segment drops into the employee’s hours and the leave segment is automatically approved.

6.



Showing 1 records of 1 Selected 0 records

<input type="checkbox"/>					Notes	Edited		Time In	Actual Time In	Time Out	Actual Time Out	Hours	Shift Total	Week Total	Position
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		7/9/2021 08:00 AM	7/9/2021 08:00 AM	7/9/2021 04:00 PM	7/9/2021 04:00 PM	8:00	8:00	8:00	7 - LWOP





# Timeclock Plus Supervisor/Editor Manual

## Adding Time Off Requests

From time-to-time you may have to put in leave time for an employee. It will be done the same way as adding a time segment. See “Adding a Time Segment” on page 6.

## Approving Employee Hours (Supervisors Only)

Employees must approve their time prior to your approval. Your approval is your electronic signature and must be done each Monday. By approving your employees’ time, you are confirming that the time is correct, valid and ready to be paid.

### Employee Approval on All Time Segments

- 1. Employees must approve all of their time and leave segments each FRIDAY. This is considered their electronic signature of approval and that all of their time is correct and valid. After each employee approves their time, you will see the box

checked under the  column.

Showing 6 records of 6 Selected 0 records

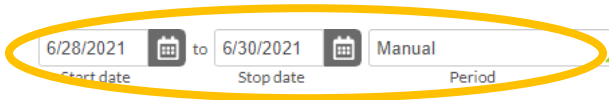
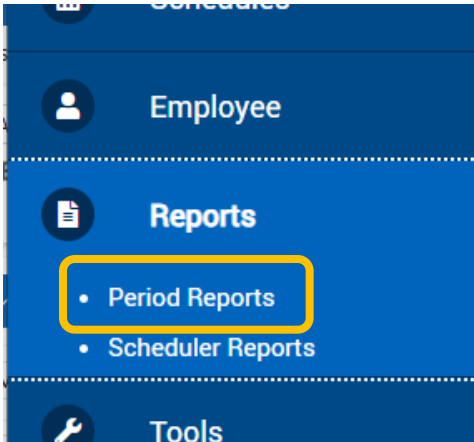
<input type="checkbox"/>					Notes	Edited		Break Length	Time In	Actual Time In	Time Out	Actual Time Out
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				30u	4/12/2021 08:00 AM	4/12/2021 08:00 AM	4/12/2021 04:30 PM	4/12/2021 04:30 PM
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				30u	4/13/2021 08:00 AM	4/13/2021 07:57 AM	4/13/2021 04:30 PM	4/13/2021 04:29 PM
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				30u	4/14/2021 08:00 AM	4/14/2021 07:56 AM	4/14/2021 04:30 PM	4/14/2021 04:32 PM
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Y			4/15/2021 08:00 AM	4/15/2021 08:00 AM	4/15/2021 12:00 PM	4/15/2021 12:00 PM
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					4/15/2021 12:30 PM	4/15/2021 12:26 PM	4/15/2021 04:30 PM	4/15/2021 04:33 PM
<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				30u	4/16/2021 08:00 AM	4/16/2021 07:57 AM	4/16/2021 04:30 PM	4/16/2021 04:36 PM

- 2. If you have a lot of employees to review, there is a report that can be used to find employees who have not approved their time.



# Timeclock Plus Supervisor/Editor Manual

**A. Go to Reports—Period Reports. Select Payroll--Missing EE Approval Report and choose the date range or use the pre-set dates.**



## Categories

Categories	* = Custom Category
Payroll	
Position	
Scheduler	
Period	
Accruals	
Miscellaneous	
Provisioning	
Joe Weekly Reports *	
Daily Reports *	

## Select a report

Approaching Exception
Approaching Overtime
Bill Rate
Complete Payroll Report
Day Breakdown
Employees Without Exceptions
Estimated Wages
Exception Summary
ILLNESS DAILY RPT *
Individual Exception
Individual Job
Individual Tracked Field Summary
Missing EE Approval *



# Timeclock Plus Supervisor/Editor Manual

**B. Choose to download, preview or print. This will give you a list of employees along with time segments that have not been employee-approved.**

Download

Settings

Preview

Print

## Approving Employee Hours

**1. Go to Hours—Group Hours. This allows you to approve multiple employees' time at once. Select the date range or keep the pre-set open weeks. (NOTE: If any time or leave segments have already been approved, these segments will NOT show up under Group Hours when filters are chosen).**

**Hours**

- Individual Hours
- **Group Hours**
- Mass Hours
- Period Export
- Time Sheets

### GROUP HOURS ☆

Sort by: ID ↑

6/28/2021 to 7/11/2021 Open Weeks Update

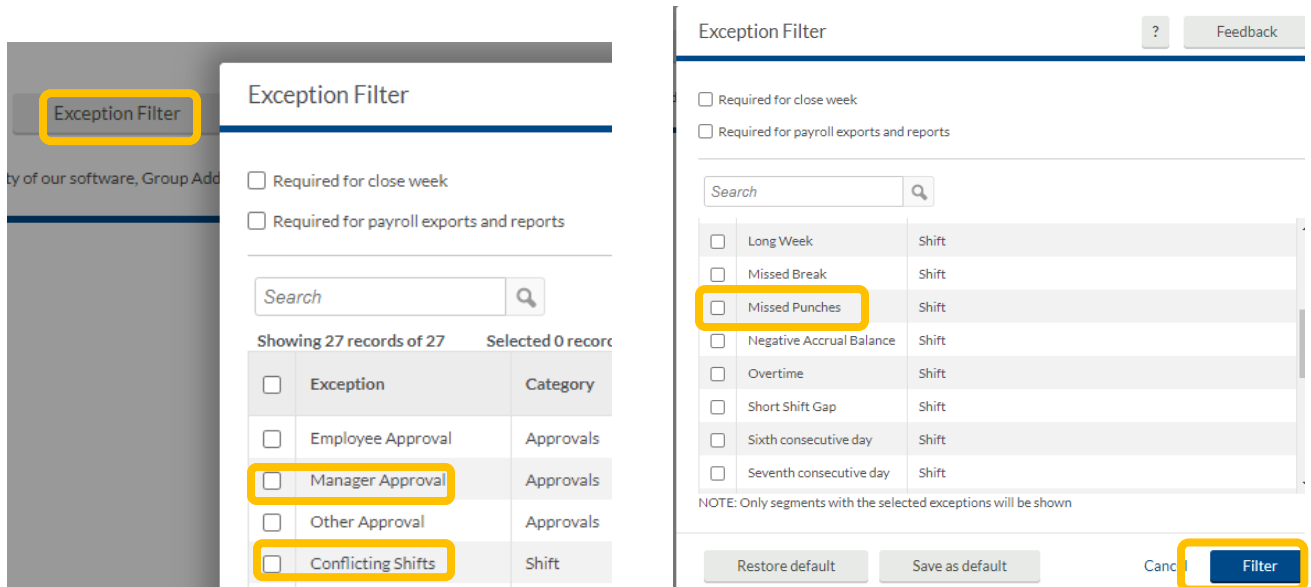
Start date Stop date Period

Employee Filter Position Filter Exception Filter  Show absences



## Timeclock Plus Supervisor/Editor Manual

2. Click on the Exception Filter button and click on the box for “Manager Approval”, “Conflicting Segments” and also scroll down to select “Missed Punches”. Once you have this done, select Filter. Conflicting segments and missed punches also show up on your dashboard which is your homepage.




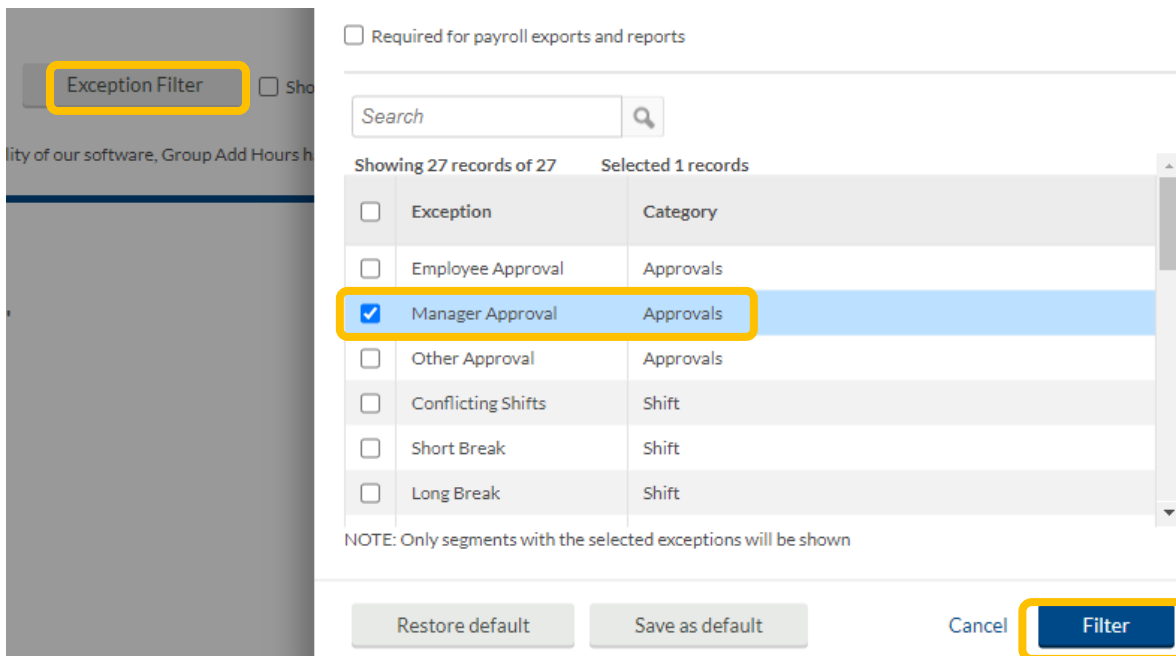
3. If there are any conflicting segments (the segments are in orange) or missed punches that haven't been fixed, these segments will show up here. You do NOT have to get out of Group Hours to correct these segments. To fix the segment in question, double click on each segment to edit the segment or choose “delete” if it's a duplicate segment.

					Notes	Edited	Break length	Time in	Actual time in	Time out
<input type="checkbox"/>										
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		6/28/2021 09:00 AM	6/28/2021 09:00 AM	<< Time sheet >>
<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		6/28/2021 09:00 AM	6/28/2021 09:00 AM	<< Time sheet >>
- <input type="text"/> <input type="button" value="+ Add"/>										
<input type="checkbox"/>					Notes	Edited	Break length	Time in	Actual time in	Time out
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Y		6/28/2021 06:45 AM	6/28/2021 06:48 AM	<< Missed >>



## Timeclock Plus Supervisor/Editor Manual

4. Once completed, go back to the Exception Filter, select “Manager Approval” then select the Filter button. Timeclock will display all of your employees’ time and leave segments that do not have Manager approval checked. **REMEMBER**—if you have already approved some of the time segments or approved a leave segment via the Leave Request Manager, these segments will already have the Manager approval checked  and won’t show up under Group Hours.



Required for payroll exports and reports


Search

Showing 27 records of 27 Selected 1 records

Exception	Category
<input type="checkbox"/> Exception	
<input type="checkbox"/> Employee Approval	Approvals
<input checked="" type="checkbox"/> Manager Approval	Approvals
<input type="checkbox"/> Other Approval	Approvals
<input type="checkbox"/> Conflicting Shifts	Shift
<input type="checkbox"/> Short Break	Shift
<input type="checkbox"/> Long Break	Shift

NOTE: Only segments with the selected exceptions will be shown

Restore default Save as default Cancel **Filter**

5. After reviewing all of your employees’ time, all corrections have been done and every employee has approved their time, you can click on the check box under the Manager Approval  column for each employee or you can approve all time at



# Timeclock Plus Supervisor/Editor Manual

once by clicking on the Manager Approval  icon. You cannot do this step until all employees have approved their time.

Individual Hours | Group Hours | Mass Hours | Period Export | Time Sheets

GROUP HOURS ☆

Sort by: ID ↑

4/5/2021 to 4/18/2021 Manual Update

Employee Filter Position Filter Exception Filter Show absences

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

Manage Exceptions Resolve Period

Showing 53 records of 53 Selected 0 records

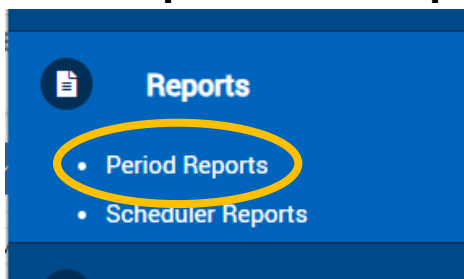
	M	E	O	Notes	Edited	Break length	Time in	Actual time in	Time out	Actual time out	Hours
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			30u	4/5/2021 08:00 AM	4/5/2021 07:58 AM	4/5/2021 04:45 PM	4/5/2021 04:47 PM	8:15
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			30u	4/6/2021 08:00 AM	4/6/2021 08:03 AM	4/6/2021 04:45 PM	4/6/2021 04:40 PM	8:15
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			30u	4/7/2021 07:30 AM	4/7/2021 07:26 AM	4/7/2021 04:15 PM	4/7/2021 04:09 PM	8:15
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			30u	4/8/2021 07:45 AM	4/8/2021 07:52 AM	4/8/2021 04:15 PM	4/8/2021 04:14 PM	8:00
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			30u	4/9/2021 07:45 AM	4/9/2021 07:50 AM	4/9/2021 04:00 PM	4/9/2021 04:00 PM	7:45

## Timeclock Reports

Running Reports will allow you to review information regarding your employees' hours in a variety of formats. These reports can be downloaded or sent directly to your printer.

### Running a Report

1. Go to Reports—Period Reports on the blue ribbon.





## Timeclock Plus Supervisor/Editor Manual

- 2. Choose a Category, generally Payroll, and a specific report. Most commonly used report is the Weekly Punch Report.**

### Categories

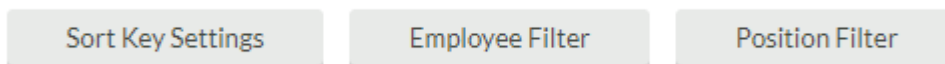
\* = Custom Category

Payroll
Position
Scheduler
Period
Accruals
Miscellaneous
Provisioning
Joe Weekly Reports *
Daily Reports *

### Select a report

Approaching Exception
Approaching Overtime
Complete Payroll Report
Day Breakdown
Employees Without Exceptions
Estimated Wages
Exception Summary
ILLNESS DAILY RPT *
Individual Exception
Individual Job
Individual Tracked Field Summary
Overtime
Weekly Punch Report
Weekly Summary

- 3. By default, the report will include all of your employees. To limit which individuals will appear on the report, set an Employee or Job Code filter.**



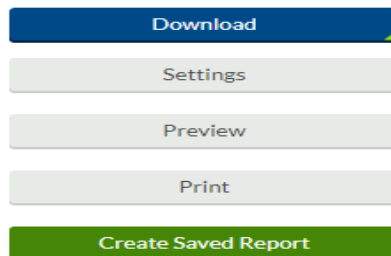


## Timeclock Plus Supervisor/Editor Manual

4. Enter the date range for the report or select a pre-defined date range from the drop-down menu.

The screenshot shows a date range selection interface. At the top, there are two date pickers: 'Start date' with the value '4/1/2021' and 'Stop date' with the value '4/22/2021'. To the right of these is a dropdown menu currently displaying 'Month To Date'. Below the date pickers is a section titled 'Categories' with a list of options: 'Payroll', 'Position', 'Scheduler', and 'Period'. The 'Payroll' option is highlighted in blue. To the right of the 'Month To Date' dropdown is a list of pre-defined date ranges: 'Manual', 'Open Weeks', 'TimeClock Week', 'This Week', 'This Period', and 'Today'. The 'Manual' option is currently selected in the dropdown.

5. You have various options for the report:
  - a. **Download**—allows you to choose which format you would like the report—HTML, PDF, or OpenXML.
  - b. **Settings**—you can change individual items on the report. These settings are unique to each report.
  - c. **Preview**—allows you to quickly see the report to see if it includes all of your criteria.
  - d. **Print**—sends this report directly to your printer for physical copies.
  - e. **Create Saved Report**—allows you to re-name the report and save any filters or settings.







# Timeclock Plus Supervisor/Editor Manual

## Automating a Report

Once you've created a Saved Report, you can also automate that report. This will allow Timeclock to automatically run a report on your behalf and email to yourself or designated recipients.

1. From the Saved Report window, click the Add button under Report Automation.

Saved Report

Base report name Complete Payroll  
Category Payroll  
Report title Test Report

**Filters**

Make report visible to all users  
 Save options  
 Save employ  
 Save positior  
 Save Sort Ke

**Report Automation**

**+ Add**

Showing 0 records of 0

Delete	Edit	Description	Created By	User To Run
--------	------	-------------	------------	-------------

2. Use the Description field to enter a name for the report automation.
3. Beneath that, select the period of time that you want to include in the report
4. Click Next.

Report Automation

**General**

Description   Active  
Created by SHILLOCK  
User to run automation SHILLOCK  Run as multiple users  
 Send report(s) from a specific email address  
Send as name   
Email address

Reporting period Floating period  ?  
Period TimeClock Week  
Period start offset Plus 0 days  
Period stop offset Plus 0 days

Cancel **Next**

Enter a unique name and configure the reporting period to run when the report is automated



# Timeclock Plus Supervisor/Editor Manual

**5. On the Output Options screen, select the Report Format in which the report will be run.**

Report Automation ? Feedback

### Output Options

Generate a single report that contains all employee information  
 Generate a personalized report for each employee

**Report Format** **Notification Settings**

PDF  
 HTML  
 OpenXML

Generate notification even when no data is found ?  
 Create exception log with export ?

Back Cancel Finish Next

Customize the output of the automation

**6. Click Next.**

**7. In the Message Recipients window, enter the email address of each individual who will be receiving this report then click Add. Once done, hit "Next".**

Report Automation ? Feedback

### Message Recipients

Add Add as SMS address

Delete	Address Type	Recipient
No records found		

Include the user that runs automation in email recipient list

Back Cancel Finish Next

Configure the list of recipients to receive the report



# Timeclock Plus Supervisor/Editor Manual

**8. On the Email Content tab, enter what you would like to appear in the body of the email with the report when it is sent.**

Report Automation ? Feedback

### Email Content

Email body

SMS body

Back Cancel Finish Next

Set custom content to be included in the body of the email

**9. Click Next.**

**10. On the Task Scheduling tab, you can choose when this report gets sent out. By default, this report will be configured to send out daily at the time you created it. To edit that setting, click the Edit icon.**

Report Automation ? Feedback

### Task Scheduling

+ Add

Showing 1 records of 1

Edit	Description↑
	Daily on All at 2:33 PM from 04/22/2021

Back Cancel Finish

Configure the rules that determine when a report will be automatically generated



## Timeclock Plus Supervisor/Editor Manual

11. **By selecting the EDIT button, you will be taken to the Schedule Task Rule window. Next to Execute, select how often you want the report to run.**
12. **Select the date you want this report to begin sending and an expiration date (if necessary).**
13. **Enter the time of day to send the report.**

Schedule Task Rule ? Feedback

Execute Daily ▼

from 4/22/2021 📅 to 4/23/2021 📅

at 2:33 PM 🕒

Days to include  Sunday  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday

Cancel Save

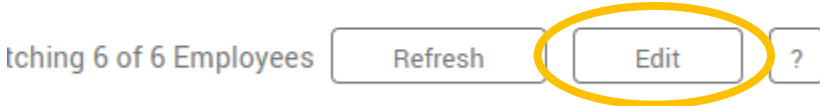
14. **Click Save on the Schedule Task Rule window.**
15. **Click Finish in the Report Automation window.**
16. **Click Save on the Saved Report screen.**



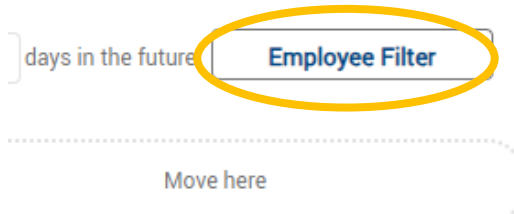
# Timeclock Plus Supervisor/Editor Manual

## ADDENDUM I: Filtering

Most of the tasks in Timeclock Manager have a set of filters you can use. Most frequently, it will be in Group Hours or Individual Hours and occasionally Employee Profiles. \*\*Related, the widgets in your dashboard are actually filtered lists based on the desired effect of the widget (ie Approvals Needed). In fact, if you click on edit button in the top right corner of the dashboard, there is an employee filter for the dashboard itself. Setting the filtering on your dashboard will make what you are seeing more relevant to you. To adjust the dashboard filter, click on “Edit”



Then “Employee Filter



### Employee Filtering:

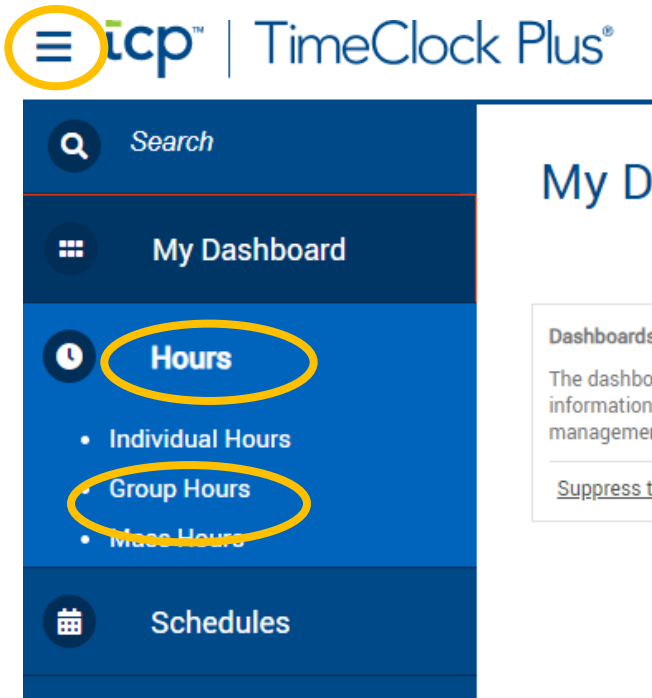
Each Editor or Supervisor in Timeclock Plus may view employees assigned to them by Business/Payroll. In most cases, you see more employees than you actually are responsible for editing/approving. Generally, your access level to employees is set at the building level. In other words, you will likely be able to see most hourly employees in your building. To make the list more tailored, you can apply filters to that list to view only who you want to see. In fact, you may choose to save a filter as the default which loads every time you log in and look at your employees. You can always create filters or temporarily modify filters to view a different subset of employees.



# Timeclock Plus Supervisor/Editor Manual

## Employee Filtering Continued:

Although filters may be used in many areas within the Timeclock Manager app, likely the most common use will be filtering Group Hours. (located under the 3 bars>Hours>Group Hours



On the following screen, you can click on Employee filter.

## Group Hours ☆

Sort by: ID 17 ▼

10/16/2023 to 10/29/2023 Open Weeks ▼ Update

Start date Stop date Period

**Employee Filter** Position Filter Cost Code Filter Exception Filter  Show absences

In order to increase performance and enhance the functionality of our software, Group Add Hours has been made part of a new feature Mass H

Adjust the settings above and click "Update"

Update



# Timeclock Plus Supervisor/Editor Manual

## Filter by Employee Status:

In the employee filter screen, there is a list of options from which to filter out employees. By default, you are filtering “Employee Status” removing all employees that are suspended or terminated. ie you are only viewing Active Employees. Be aware that this could exclude a recently terminated employee that still has hours that need to be approved and paid.

Employee Filter

- Employee Status
- Employee ID
- Position
- Classification

Exclude suspended

Exclude terminated

Exclude salaried

## Filter by Employee ID:

Employee ID works well if you have a short list of employees that you want to see or if you have one or two employees you don’t need to access. To use ID as a filter, you need to check the Employee ID checkbox on the left and the choose to “include” or “exclude” a certain employee or employees. Highlight and delete the “0-999999999”, then click the “select” button. Then simply check the employees you wish to see or exclude from your list. You can also type the employee name in the search box if you an a long list to scroll through. Click Select.

Employee Filter

- Employee Status
- Employee ID
- Position
- Classification
- Department
- Location

Preview

Include ▾

0-999999999

Select

Example: 1-5,8,10-1000



# Timeclock Plus Supervisor/Editor Manual

## Filter by Employee ID (continued):

Select Employees

Showing 14 records of 14      Selected 2 records

<input type="checkbox"/>	ID	First Name	Last Name	Export Code	Department	Class
<input type="checkbox"/>	5016	MICHAEL	CAULFIELD	5016	TECH MAINT COORDINATOR	56
<input checked="" type="checkbox"/>	5105	AARON	SMITH	5105	TECHNICIAN	45
<input checked="" type="checkbox"/>	6194	NANCY	THOMAS	6194	MEDIA SVCS TECHNICIAN	56
<input type="checkbox"/>	7343	MATTHEW	WHITT	7343	A/V EQUIP TECHNICIAN	56

## Position:

If you have a longer list of employees, you may want to filter by position. In other words, you want to see all employees with a specific position. One caveat on filtering by position is that many employees have more than one position (tutor, IA, child nutrition, custodial, etc.) so you may not get the results you expect. It works in much the same way as Employee ID... Check the checkbox on the left. Choose to “Include” or “Exclude” certain positions. Clear the 1-999999999 and select the positions (an employee must have in order for you to see them) you wish. Click Filter. At this point, you will notice a few more options. You can choose to filter only if the position is the “default” for that employee and/or if the position is active or not.





# Timeclock Plus Supervisor/Editor Manual

## Employee Filter

### Classification:

This is basically you building number. Only useful to you if you manage employees in several buildings (Child Nutrition, Custodial, etc.)

### Department:

Filtering by department can be useful if you supervise one or a couple of groups of employees. You may want to filter, for example, just IAs or just custodial, etc.

### Employee Role:

Another great filter is Employee Role. It is similar to department, but more specific to exactly what the employees do. This is because the role is based on what building the employee is assigned to AND what employee group they are in. For example, one employee role is “OP/Tech Year Round Transp” This would only display employees assigned to Transportation that are also assigned to OP/Tech employee group and scheduled to work year round. An easy way to find the roles in your building is by using your building code (3 digit number) in the search bar. In this example, transportation is 062. Again roles are defined by employee group (first 3 digits) and location (last 3 digits). Adding 062 into the search bar displays all of the roles assigned to transportation. This will help you select the roles that you need to complete your job. \*\*Note, there is a scroll bar that may show more roles than initially displayed.



# Timeclock Plus Supervisor/Editor Manual

## Employee Filter



Preview Load Save as Reset All

Include

062

<input type="checkbox"/>	22062	8 HR BUS DRIVER
<input type="checkbox"/>	26062	MAINT/MECHANIC
<input type="checkbox"/>	39062	TRANSP 203
<input type="checkbox"/>	43062	TRANSP 247
<input type="checkbox"/>	44062	OP/TECH YEAR ROUND - TRANSP

**Employee Filter Options:**

- Employee Status
- Employee ID
- Position
- Classification
- Department
- Location
- Employee Role**
- Schedule Group
- Manager
- Positions
- Provision
- Qualifications
- Hire Date
- Days Employed

### Other Filters:

**We do not currently assign any of the remaining options.**

- Schedule Group
- Manager
- Positions
- Provision
- Qualifications
- Hire Date
- Days Employed
- Custom Fields
- Summary



# Timeclock Plus Supervisor/Editor Manual

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## Final Thoughts: