TimeForce II

Supervisor Guide

Qqest

software systems

Time Force II Supervisor Guide
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Introduction

Self Service users can log into the TimeForce II system from any machine that has access to the program database. Simply enter the user name and password assigned to you by the TimeForce administrator, and enter the Company Code.
Note: The Company Code is global for *all* users logging into the program.

Supervisor users have access to the following sections of the TimeForce II program:

- **Time Cards:** This section of the program is where time and attendance punches and hours and earnings totals for each pay period are displayed.
- **Supervisor:** This screen allows users to enter punches, absences, disbursements, or hours totals for an entire group of employees at a time.
- **Reports:** This section of the program allows you to generate comprehensive reports detailing your Time Card information.
- **Employee:** This screen allows users to view the employee profile, pay policy and position/salary information for the employees assigned to you.
- **Schedule:** This screen allows you to create and maintain schedules for your employees.

Preferences

The “Preferences” link in the upper right-hand corner of the screen allows you to specify user options. From here you can change your login password, email address, and specify various display options.

- The **Role** field displays your user “type” (as in “Admin,” “Employee,” “Supervisor,” etc.). This field is not editable.
- The **User** field displays the user name that is used when logging into the system. This field is not editable. Only an “Admin” level user can edit Self Service user names.

- The **Password** field allows you to specify a password that you will use when logging into the system.
- When changing your login password you are required to re-type the chosen password into the **Confirm Password** field.
- Certain program functionality allows for the option of email notification. Enter the **Email** address to be used by the system.
- The **Start Tab** is the screen that will open by default upon login to the system. Make the desired selection from the drop-down menu.
- Select the appropriate **Culture** from the drop-down menu.
- The **Last Logged In** field displays the date and time of the last time that this user was logged into the system, and is not editable.
- Select the desired **Hours Format** from the drop-down menu. The available options are “Decimal Hours” and “Hours and Minutes.”
- The **Decimal Places** field allows you to select the number of decimal places to be displayed in hours totals. The system uses a default of two decimal places.

Click on the [UPDATE] icon to save the changes that you have made.

Entering Punches

Self Service users can clock in or out for the day using either a physical time clock, or direct punch entry from within the TimeForce II program. This section contains information on punching yourself in and out of the system *only*. Refer to “Correcting Time Cards” on page 7 for information on adding and editing punches for the employees that you are assigned to supervise.

Time Clock Punch Entry

The instructions for punching at a clock vary slightly depending on the model of clock being used.

ETC 100 Model

1. Ensure that the green READY light on the clock face is illuminated.
2. Hold the time card with the magnetic strip facing right.
3. Quickly and evenly slide the card through the card reader slot from top to bottom.
4. If the card was swiped correctly, the card number appears briefly on the display, a short beep sounds, and the READY light flashes. If the card was not swiped correctly, three beeps sound, the card number does not appear on the display, and the red WAIT/ERROR light comes on. If the READY light returns after the WAIT/ERROR light stops blinking, swipe the card again. If the WAIT/ERROR light remains on, the system is not ready to accept card swipes.

IQ 300, 400 or 500 IntelliClock

1. Ensure that the display panel on the clock reads “READY.”
2. If you are using magnetic time cards, hold the card with the magnetic strip facing right. If you are using cards with barcodes, hold the card with the barcode facing left.
3. Quickly and evenly slide the card through the card reader slot from top to bottom.
   Note: Proximity time card users need only hold their time card up to the target located on the right of the face of the clock.

4. The display panel shows the card number of the card just swiped, and reads

   MAKE SELECTIONS
   THEN PRESS "ENTER"

5. Press the <ENTER> key on the clock keypad to complete the punch entry.

IQ 1000 IntelliClock

1. Ensure that the clock display is showing the logo screen with the time displayed at the bottom.
2. If you are using cards with magnetic strips, hold the card with the magnetic strip facing right. If you are using cards with barcodes, hold the card with the barcode facing left.
3. Quickly and evenly slide the card through the card reader slot from top to bottom. If you are using direct keypad entry, type the card number into the clock keypad and press <ENTER>. The display panel shows the card number and reads:

   READING FINGER
   PUT FINGER
   ON SENSOR

   Note: The Biometric unit on an IQ 1000 is optional. Finger template steps do not apply to a clock with no Biometric unit.
4. Place your finger on the IQ 1000 template reader. To ensure correct placement, the first joint of the finger should be placed against the raised ridge at the base of the reader screen, and place the fingertip firmly against the screen. Once your template has been verified, the following message is displayed:

   CHOOSE:
   DEPT
   JOBS IN/OUT
   TIPS LUNCH/BREAK
   ENTER TO ACCEPT

   Note: The available options on this screen depend on which features are enabled on your clock. For instance, if you do not have the "IN/OUT" keys enabled, then the option for IN/OUT will not appear on this screen.

5. Press the <ENTER> key to complete the punch entry.

V800/V850 Velocity Clocks

1. Check to see that the clock display reads “Ready” with the date and time displayed at the top of the screen.
2. Enter your card number at the clock keypad and press <ENTER>. The display panel shows the card number and reads:

CARD #[X]
READING FINGER ID
PUT FINGER
ON SENSOR

3. Place your finger on the template reader. To ensure correct placement, the finger should be placed with the first joint of the finger against the raised ridge at the base of the reader screen, and with the fingertip pressed firmly against the screen. Once your finger ID has been verified, the following message is displayed:

ID [X] CHOOSE
IN/OUT
ENTER = ACCEPT

4. Press the <ENTER> key to complete the time & attendance entry.

Self Service Punch Entry

Supervisor users can enter punches into the system from within the TimeForce software. Punches entered this way are identical to punches entered at a time clock.

Click on the In/Out icon in the upper right-hand corner of the screen. The **Punch** screen opens at the top of the screen.

- The **Punch** field displays the time of the punch. This field is not editable.
- The **Date** field displays the date of the punch. This field is not editable.
- The **Do Not Round** setting is for Administrator/Supervisor use only, and is not available for Employee users.
- The **Transfer** setting allows you to specify that this punch is a department transfer punch.

- Select the **Type** from the drop-down menu (as in “Normal,” “Lunch” or “Break”).
- The **Mode** field allows you to specify the punch as “In” or “Out.” With the “Auto” option selected, the system will automatically determine the punch mode based on the order of the punches on the Time Card.
- Enter any desired **Notes** about the punch entry. There is a maximum of 150 characters.

Click on the [CREATE] icon to add the punch. Click on the [CANCEL] icon to cancel the changes that you have made.

Correcting Time Cards

The Time Card section of the program is where the time and attendance punches and hours and earnings totals for each pay period are displayed. Click on the main “Time Card” navigation tab at the top of the screen.

A Supervisor user has access to their own time and attendance data, as well as the data of the employees that they supervise. The user will have “Supervisor-level” access to their assigned employees, but only “Employee-level” access to their own data.

The **Employee** drop-down menu at the top of the screen allows you to select the employee whose record your would like to view or edit. Click on the ◀ and ▶ icons to scroll though employees. Click on the 🔍 icon to search for the desired employee by name, card number, pay type, etc.

Creating, Editing and Deleting Punches

A Supervisor user has the ability to manually edit the punch data on the Time Cards of their assigned employees. A Supervisor user is not able to create or edit their own time and attendance data.

Entering Punches

Click on the “Enter Punch” link located in the row of links directly above the main Time Card table. The **Punch** window appears at the top of the screen.

Enter punch information as desired. Only the **Punch** and **Date** fields are required.

The left-hand corner of the screen contains basic punch information.

- **Punch:** This is the time of the punch in 24-hour format.
- **Date:** This is the date assigned to the punch. Click on the 📅 icon to select the date from a calendar.

- **In Punch Date:** If this is a punch other than the first IN punch of the day, this field will display the date on which the IN punch for this schedule fell. This field is used when you have employees working a graveyard schedule that runs past midnight. This field is not editable.
- **Do Not Round:** With this option selected, any rounding policies assigned to the employee will not be applied to this punch.
- **Type:** The punch type specifies whether the punch is a “NORMAL,” “LUNCH” or “BREAK” punch. In most cases, a punch type of “NORMAL” is used.
- **Created Date:** This field displays the date that the punch was created. For example, if you manually insert a punch for yesterday's date, today's date is displayed in this field.
- **Created Time:** This field displays the actual time that the punch was created. This field can vary from the “Punch” field if the punch has been manually edited, or if the punch has been rounded according to the policies that the employee is assigned to.

The right-hand corner of the screen contains various punch assignments and punch notes.

- **Mode:** This field allows you to select whether the punch is specified as an “IN” or “OUT” punch. A setting of “AUTO” allows the system to automatically determine the in/out status of a punch, based on the punch order on the Time Card.
- **Department:** This field allows you to assign the punch to a department level. Select the desired department from the drop-down menu.
- **Notes:** Enter any desired additional notes about this punch or punch edit into this field. There is a maximum of 150 characters.

Click on the [CREATE] icon to save the punch. Click on [CANCEL] to cancel the changes that you have made.

Viewing and Editing Existing Punches

Each punch on the Time Card screen is a link. Click on the link to bring up the **Punch** screen at the top of the screen containing the selected punch's information.

The information displayed for existing punches is identical to the fields described in the previous section.

Creating, Editing and Deleting Absences

Use the following instructions to create, edit and delete absences on the Time Cards of employees that you supervise.

Entering Absences

Click on the "Enter Absence" link located in the row of links directly above the main Time Card table. The **Absence** window appears at the top of the screen.

The right-hand section of the screen contains basic absence information.

- **Hire Date:** The date of the employee's hire is displayed. This setting is not editable.
- **Dates:** The date fields allows you to select the range of dates for which absences will be created. Enter the desired dates, or click on the 📅 icons to select the dates from a calendar.
- **Weekdays:** Put a check mark in the box for each day of the week that you would like absences to be created. For example, if the date range selected crosses the weekend, leaving the boxes for Saturday and Sunday unchecked specifies that no absences are to be created for those days. Click on the [CHECK ALL] icon to check all of the boxes.
- **Hours:** This field contains three options:
  - Select **Decimal Hours Per Day** if you would like the system to award the employee with a set number of absence hours for each day specified. Enter the desired number of hours, and enter a Start Time. The **Start Time** is the time at which the hours total will begin on the Time Card.

  - Select **Based on Shift Duration** if you would like the system to award absence hours based on the number of hours that the employee is scheduled to work for each specified day.
  - Select **Based on Shift Policy** if you would like the system to award hours based on the number of absence hours specified in the Shift Policy that the employee is assigned to.

The right-hand section of the screen allows you to make various assignments to the absence, and leave absence notes.

- **Absence Policy:** If you would like to assign this absence to an Absence Policy in the system, make the desired selection from the drop-down menu.
- **Department:** If you would like to assign this absence to a department level, make the desired selection from the drop-down menu.
- **Notes:** Enter any desired notes about the absence. Absence notes can be viewed from the Time Card. There is a maximum of 150 characters.

Click on the [CREATE] icon to create the absence. Click on [CANCEL] to cancel the changes that you have made.

Generating Reports

The reports section of the program allows you to print comprehensive reports of your Time Card, Employee and Schedule information.

It is suggested that you run reports, especially if you are not exporting your hours and earnings information to a payroll software.

Click on the main “Reports” navigation tab at the top of the screen. Reports are broken up into several sections:

- The **Audit Reports** group allows you to monitor your employees' punch exceptions, verifications, etc.
- The **Employee Reports** group details employee information such as birthdays, hire dates, anniversaries, etc.
- The **Schedule Reports** group is used to view and print data based on the schedules that employees are assigned to work in the system.
- **Time Reports** display the hours and earnings totals for your employees, as well as basic employee tracking information.

The majority of reports that are typically used at the end of a pay period are located in the “Time Reports” group.

Brief descriptions of the most commonly used Time reports are as follows:

Over/Under Hours

This report allows you to specify a threshold for hours worked and then notifies you of any employees who have gone over or under the specified hours.

Hours Detail

This report displays a total of the hours that employees have worked for the specified date range. Totals are broken up by “Regular,” “Overtime,” “Holiday” hours, etc. All hours are totaled at the bottom of the report.

Time Card

This is the most commonly used time & attendance report. The report gives you a detailed breakdown of the hours and punches for the specified date range. Multiple levels of information can be displayed.

Report Criteria and Filters

When you click on any report in the system, the “report criteria” screen opens. This screen is used to set filters, specifying the types of data that you would like to see on the report.

The available filters vary greatly depending on the report being printed. However, the process of specifying filters and generating reports is generally the same.

- The header of each report displays the selected report group, and allows you to select a different report from the drop-down menu. Put a check mark in the box at the right-hand corner of the header to open the report in a separate browser window.
- A **Date Range** allows you to print only the data that falls within the selected dates. The range can be automatically specified using the drop-down menus at the end of the field, or “Custom” can be selected, allowing you to specify your own range. Click on the 📅 icon to select the dates from a calendar.
- The **Employees** section allows you to select a range of employees whose data you would like to view. This setting includes four selection boxes. Two each for “Department,” and “Employee.” Any department or employee listed in the **Invisible** box will not be included on the report. Select the desired departments/employees and use the arrow icons to move them to the **Visible** section of the screen.
  Note: By default, *all* employees are included on the report.

- The **Additional Filters** section of the screen allows you to specify additional filters for the report. The available filters vary greatly depending on the report being used. Select a setting from the drop-down menus to *only* view the specified data (as in data for a specific department, or employee type only). Put a check mark in the box next to each type of information that you would like to be included in the report (as in pay information or "Signature Section").

Click on the [GENERATE] icon at the bottom of the screen to view the report.

Verifying Time Cards

Supervisor users can verify their own time card, as well as the time cards of each employee that they are assigned to supervise in the system. You will have “Employee” level access to your own time card data, and “Supervisor” level access to your employees.

A pay period can only be verified once it has ended. If the notification option on the verification policy is enabled, the system will notify you upon login to the system that there is a completed pay period awaiting verification.

From the Time Card screen, select the desired employee from the **Employee** drop-down menu at the top of the screen. The **View** setting in the upper left-hand corner of the screen is set to “Weekly” by default. Select the pay period view from the drop-down menu (as in “Bi-Weekly,” “Semi-Monthly,” etc.).

The **Verification** section is displayed at the bottom of the screen below the hours totals. To verify the pay period, the supervisor must click on the box under the **Verification** section of the screen. A green check mark appears, denoting that the pay period has been verified. Repeat these steps for each assigned employee.

Employee Info

This section of the program allows you to view the employee profile, pay policy and position and salary information of the employees assigned to you.

Adding an Employee Profile

The following topic walks you through creating an employee profile from the main “Employee” section of the program. Click on “Employee” from the main navigation tabs at the top of the screen.

The **New Employee** section of the screen contains two options, “Quick Entry” and “Detailed Entry.”

Inserting an Employee Using Quick Entry

1. Click on the [QUICK ENTRY] icon located under the **New Employee** section of the screen. The “Quick Entry” screen opens.
2. New employee information is entered into the fields with blue headers in the top half of the screen. Existing employees are displayed under the grey headers in the bottom section of the screen.
3. Enter the desired **Employee ID**. This ID will be displayed throughout the program, and should be easily recognizable.
4. Enter the employee's **Last Name** and **First Name**.
5. If desired, enter the employee's **Middle Name**.
   Note: This setting is optional.
6. Enter the employee's **Hire Date**. By default this field is populated with the current system date. Click on the 📅 icon to select the desired date from a calendar.
7. If you would like to assign this employee to a supervisor, make the desired selection from the **Supervisor** drop-down menu.
   Note: This setting is optional.

8. If you would like to assign this employee to a default department level, make the desired selection from the **Department** drop-down menu. This is the department assignment that will be used when specific departmental information is not entered by the employee with his or her punches.
   Note: This setting is optional.
9. If desired, enter the employee's **Pay Rate**.
   Note: This setting is optional.
10. Click on the [ADD] icon to save the employee profile. The specified profile information appears under the grey headers at the bottom of the screen.

Enter as many employees as desired, click on [ADD] each time to save the profile and clear the form. Click on the ✕ icon to remove a profile from the system.

Inserting an Employee Using Detailed Entry

1. Click on the [DETAILED ENTRY] icon located under the **New Employee** section of the screen. The “Detailed Entry” screen appears.
2. The **Required Information** section of the screen contains the most basic profile information.
   - Select the desired **Salutation** from the drop-down menu.
     Note: This setting is optional.
   - Enter the employee's **First Name**.
   - Enter the employee's **Middle Name**, if desired.
     Note: This setting is optional.
   - Enter the employee's **Last Name**.
   - Enter an **Employee ID**. This ID will be displayed in various sections of the program, and should be easily recognizable.
   - Enter a **Card Number**. This is the number on the time card that the employee will use to punch in and out at a physical time clock. This number is also used for other forms of punch entry.
   - Enter the employee's **Hire Date**. By default this field will be populated with the current system date. Click on the 📅 icon to select the date from a calendar.

3. The **Photo** section of the screen allows you to upload an image of the employee. The optimal file size is 100 x 100. Click on the [BROWSE] icon to select an image. Once the desired image has been selected, click on the [ADD PHOTO] icon.
4. The **Suggested Information** section of the screen contains information that is not required by the system, but may be useful for reporting and functionality purposes.
    - If you would like to assign the employee to a **Position**, make the desired selection from the drop-down menu.
    - If you would like to assign this employee to a **Supervisor**, make the desired selection from the drop-down menu.
    - Select the employee's type of pay (as in “Hourly,” “Salaried,” “Commission,” etc.) from the **Pay Type** drop-down menu.
    - Enter the employee's rate of pay into the **Pay Rate** field.
    - Select the employee's interval of pay (as in “Hourly,” “Monthly,” “Annually,” etc.) from the **Pay Interval** drop-down menu.
    - If you would like to assign the employee to a **Base Pay Code** in the system, make the desired selection from the drop-down menu.
    - If you would like to assign the employee to a default department level, make the desired selection from the **Department** drop-down menu. This is the department assignment that will be used when specific departmental information is not entered by the employee with his or her punches.

The **Demographics** section of the screen allows you to specify additional demographic information for this employee. Click on the ⌄ icon located to the left of the header. To save the profile without adding additional demographic information, click on the [SAVE] icon in the lower right-hand corner of the screen.

Employee Demographics

Employee demographics are broken out into the following categories: “Contact Information,” “Employee Status,” “Additional Information,” and “Clock Configuration.”

All demographic information is optional.

Contact Information

- Enter the employee's address information into the appropriate fields.
- Various options in the system allow for email confirmations to be sent to applicable employees. These message will be sent to the address specified in the **Email** field.
- Enter the employee's work, home, cell, and pager numbers, as desired.

Employee Status

- If the employee is no longer with the company (or was once terminated, but has since been rehired), enter the date of their termination into the **Termination Date** field. Click on the 📅 icon to select the date from a calendar.
- The **Seniority Date** field is used when the employee has been terminated and rehired. Click on the 📅 icon to select the date from a calendar.
- Enter the employee's date of birth into the **Birth Date** field. Click on the 📅 icon to select the date from a calendar.
- Select the **Employee Type** from the drop-down menu (as in “Full Time,” “Part Time,” “On Call,” etc.).
- With the **Supervisor** option enabled additional employee can be assigned to this employee as their supervisor.
- Select the **Probation** option to specify that the employee is on probation, if desired.

Additional Information

- Enter the employee's Social Security Number into the **SSN** field.
- Enter the employee's drivers license number into the **Drivers License** field.
- Enter a **Drivers License Expiration Date** if desired.
- Select the employee's **Union Status** from the drop-down menu.
- If applicable, select a **Disability** from the drop-down menu.

- Select the employee's **Ethnicity** from the drop-down menu, if desired.
- Select the employee's **Gender** from the drop-down menu.
- Select the employee's **Marital Status** from the drop-down menu.
- If desired, enter a **Nickname** for the employee.
- If applicable, select a **Military Branch** from the drop-down menu.
- Select the **Disabled Veteran** option, if applicable.
- Select the **Vietnam Veteran** option, if applicable.
- Select the **Smoker** option, if desired.
- Enter any additional notes about the employee into the **Notes** box. There is a maximum of 200 characters.

Clock Configuration

Certain models of time clock allow for the uploading of employee information. This section is where the applicable information is specified.

- The **Clock Password** (in conjunction with a card number) is the password that the employee must enter to access the clock's menu options.
- The **Clock Security** field allows you to specify what level of access the employee will have to the clock's menu options.
- When using a time clock with an external door security device, the **Allow Door Access** option specifies whether the employee is to be allowed to gain access to the secured area with successful punch entry at the clock.
- Select the **Display Clock Message** to define that a clock message is to be persistently displayed to the employee when punching at the clock.

Once the desired demographic information has been entered, click on the [SAVE] icon in the lower right-hand corner of the screen.

Updating Employee Profile Information

Occasionally it is necessary to update the profile or demographic information for an existing employee in the system. Use the following instructions to update an existing employee profile.

1. From the main “Employees” screen, click on the [EDIT/VIEW] icon located under the **Existing Employees** section of the screen. The “Employee Search” screen opens.
2. The system allows you to search for existing employees based on multiple settings:
    - Last Name
    - Employee ID
    - Card Number
    - SSN (Social Security Number)
    - Status
    - Pay Type
    - Supervisor
    - Employee Type
    - Department
3. Once you have entered the desired search criteria, click on the [SEARCH] icon.
   Note: Clicking on [SEARCH] with no criteria specified will bring up a list of all employees.
4. The found employees are displayed in the bottom section of the screen. The setting in the **Employee** column is a link. Click on this link to bring up the employee's profile screen.
5. Edit or update the employee's profile as desired. Click on the [SAVE] icon in the lower right-hand corner of the screen to save the changes that you have made.

Adding/Changing Employee Pay Policies

Use the following instructions to add or edit the pay policies that an employee is assigned to in the system.

Click on the “Employee” tab, and then on the “Pay Policies” link located in the row of links directly below the main program navigation tabs.

Select the desired employee from the **Employee** drop-down menu at the top of the screen. Click on the ◀ and ▶ icons to scroll though employees. Click on the 🔍 icon to search for the desired employee by name, card number, pay type, etc.

The screen is broken up into several sections. If only the header of a specific section is visible, click on the ▼ icon to display the entire section.

Pay Periods

This is the pay period that the employee is assigned to in the system. Employees can only be assigned to one pay period at a time, but a record of existing assignments and changes is kept.

1. Select the **Pay Period** that you would like to assign the employee to from the drop-down menu.
2. Specify the **Effective Date** of this pay period assignment. Click on the 📅 icon to select the date from a calendar.
3. Click on the [ADD] icon to save the pay period assignment.

Pay Period assignments are displayed under the **Pay Period**, **Effective Date** and **Type** headers. Click on the link in the **Pay Period** section to edit an assignment. Click on the ✕ icon to delete a pay period assignment.

Overtime Settings

Select the desired **Overtime Week** from the drop-down menu. This setting indicates the starting and stopping days of your weekly overtime period.

Enter the starting date for two week overtime into the **Two Week Overtime Start Date** field, if desired. Click on the 📅 icon to select the date from a calendar. This date must coincide with the setting specified for **Overtime Week**.

Overtime Policies

Each overtime policy that has been created from the **Pay Codes** section of the main “Admin” tab is available for selection in the **Overtime** drop-down menu. Select each policy that you would like to assign the employee to and click on the [ADD] icon.

Assigned policies are displayed under the **Overtime**, **Type**, **Threshold**, and **Policy Group** headers. Click on the ✖ icon to remove an overtime policy assignment.

Rounding Policies

Each rounding policy that has been created on the main “Admin” tab is available for selection in the **Rounding** drop-down menu. Select each policy that you would like to assign the employee to and clock on the [ADD] icon.

Assigned policies are displayed under the **Rounding**, **Type** and **Policy Group** headers. Click on the ✖ icon to remove a rounding policy assignment.

Position and Salary Records

Position and Salary records are created to document changes in employee pay and position within the company. Although only one record can be active at a time, *all* changes in position and salary are kept in the system.

Click on the main “Employee” tab, and then on the “Position and Salary” link located in the row of links directly below the main program navigation tabs.

Select the desired employee from the **Employee** drop-down menu at the top of the screen. Click on the ◀ and ▶ icons to scroll though employees. Click on the 🔍 icon to search for the desired employee by name, card number, pay type, etc.

Position and Salary

1. To create a new Position and Salary record, click on the [ADD POSITION AND SALARY] icon at the top of the screen.
2. Enter the **Effective Date**. This is the date that any changes to the employee's pay or position will go into effect. Click on the 📅 icon to select the date from a calendar.
3. Select the desired **Position** from the drop-down menu.
4. If you would like to assign the employee to a **Supervisor**, make the desired selection from the drop-down menu. The supervisor selected here will have access to the employee's time and attendance information using the Supervisor Self Service interface.
5. If you would like to specify an **EEO Category**, make the desired selection from the drop-down menu.
6. Select the employee's **Pay Type** (as in “Hourly,” “Salaried,” “Commission,” etc.) from the drop-down menu.
7. Enter the employee's rate of pay into the **Pay Rate** field.
8. Select the **Pay Interval** (as in “Hourly,” Monthly,” Annually,” etc.) from the drop-down menu.

9. The **Change Reason** field allows you to make note of the reason for this change in position and salary (such as “Promotion,” “Demotion,” etc.).
10. Select the pay code that you would like to assign as this employee's base pay from the **Base Pay Code** drop-down menu.
11. If you would like to assign this employee to a default department level, make the desired selection from the **Department** drop-down menu.
12. Click on the [SAVE] icon to save the changes that you have made.

The new entry is displayed in the main **Position and Salary** section of the screen. To edit a record, click on the link in the **Effective Date** column. Click on the ✕ icon to remove a record from the system.

Pay Level

Pay Levels allow you to assign your employees to multiple rates of pay which will only go into effect when a Premium Pay Code is used.

Example: The Premium Pay Code “Premium 1" specifies that employees working in the “Shop” department receive a “Level 1" pay rate. This may mean $9.00 an hour for one employee, but $12.00 an hour for another, based on the Pay Level settings specified here.

1. Click on the [ADD PAY LEVEL] icon located to the right of the main **Pay Levels** header.
2. Enter an **Effective Date** for this pay level record. Click on the 📅 icon to select the date from a calendar.
3. Select the desired **Pay Level** from the drop-down menu. The available options are “Base Pay Level” and “Pay Level One” through “Pay Level Ten.”
4. In the **Amount** field, specify how much this employee is to be paid whenever a Premium Pay Code attached to this pay level is used.
5. Click on the [SAVE] icon to save the Pay Level record.

Existing records are displayed under the main **Pay Level** section of the screen. Click on the link in the **Effective Date** field to edit a record. Click on the ✕ icon to delete a record from the system.

Error Monitoring

Error Monitoring allows you to track discrepancies on employee Time Cards. There are three different types of errors in TimeForce:

- **Schedule Errors:** Schedule errors track the discrepancies between the shifts that your employees are scheduled to work, and the actual punches on their Time Card.
- **Punch Errors:** This type of error notifies you of any punches on the employee's Time Card that should be corrected before the pay period is processed (as in missed or duplicate punches, etc.).
- **Lunch Errors:** Lunch errors notify you of any discrepancies between the lunch/meal break that your employees are allowed, and the actual lunch/meal punches on their Time Card.

The “Error Defaults” setup located under the **Company** section of the main “Admin” tab allows you to specify the default Error Monitoring settings that are applied to new employees as they are created in the system. The **Error Monitoring** section of the “Employee” tab allows you to customize the default settings on a per-employee basis, if necessary.

Click on the main “Employee” tab, and then on the “Error Monitoring” link located in the row of links directly below the main program navigation tabs.

Select the desired employee from the **Employee** drop-down menu at the top of the screen. Click on the ◀ and ▶ icons to scroll though employees. Click on the 🔍 icon to search for the desired employee by name, card number, pay type, etc.

The employee-specific Error Monitoring screen is identical to the Error Defaults screen. Refer to the electronic help system for a detailed description of program errors, as well as instructions configuring Error Monitoring settings.

Creating, Editing and Deleting Schedules

The main “Schedule” tab allows you to create and maintain schedules for your employees, and contains many different options, each designed to allow maximum flexibility and ease of use.

Click on the main “Schedule” navigation tab at the top of the screen.

Shift Policies

Shift Policies allow you to create standard sets of rules which can be applied to your shifts and schedules. Create rules specifying the number of required hours, automatic meal break deductions, rounding and base pay code assignments, etc. Refer to the section below.

Shifts

This option allows you to create the shifts that your employees will be assigned to. Shifts define starting and ending times, Shift Policies and assigned department levels. See page page 32.

Schedule Template

A Schedule Template allows you to create the schedules that your employees will be assigned to. A schedule defines the number of days or days of the week that the schedule will be in effect, as well as the shift that assigned employees will be scheduled to work. See page page 33.

Shift Policies

Shift Policies allow you to create standard sets of rules which can be applied to your shifts and schedules. Create rules specifying the number of required hours, automatic meal break deductions, rounding and base pay code assignments, etc.

1. Click on the main “Schedule” navigation tab at the top of the screen, and then on either the [SHIFT POLICIES] icon located under the **Create/Edit** section of the screen, or the “Shift Policy” link located in the row of links directly below the main program navigation tabs.
2. The main “Shift Policy” screen appears. Click on the [CREATE SHIFT POLICY] icon located in the lower left-hand corner of the screen.
3. Enter a **Name** for this policy as you would like it to appear in the system.
4. If you would like to assign employee schedules to a default department level, make the desired selection from the **Department** drop-down level.
5. The **Before Start** field allows you to enter the number of minutes before the scheduled starting time that punches will be recognized as punches for the upcoming shift.
   Example: The schedule start time is 8 a.m. The “Before Start” setting is set to 15 minutes. An employee assigned to this shift policy clocks in at 7:50 a.m. This punch will be considered an early punch for the upcoming shift. If the same employee were to clock in at 7:40, the punch would be flagged with a “Not Scheduled” error code (depending on your Error Monitoring settings) due to the fact that it does not fall within the designated “Before Start” window.
6. The **After Start** field allows you to enter a grace period for employees clocking in late.
   Example: The “After Start” field is set to 3 minutes. An employee assigned to this shift policy clocks in 2 minutes past their scheduled shift start time. No “In Late” punch error will be generated. If the same employee were to clock in 4 minutes after their scheduled start time, the punch would be flagged with an “In Late” error.
7. The **Before End** field allows you to enter a grace period for employees clocking out early.
   Example: The “Before End” field is set to 5 minutes. An employee assigned to this shift policy clocks out 3 minutes before their scheduled shift end time. No “Out Early” error will be generated. If the same employee were to clock out 6 minutes before their scheduled stop time, the punch would be flagged with an “Out Early” error.

8. The **After End** field allows you to enter the number of minutes after the scheduled ending time that punches will be recognized as punches for the previous shift.
   Example: The schedule end time is 4 p.m. The "After End" setting is set to 30 minutes. An employee assigned to this shift policy clocks out at 4:15. This punch will be considered a late out punch for the previous shift. If the same employee were to clock out at 4:35, the punch would be flagged with a "Not Scheduled" error code.
9. Enter the number of **Required Hours** for schedules assigned to this policy. If employees working this schedule do not work the specified number of hours, the system will flag their punches for the day with an "Under Hours" error. This setting is used for Error Monitoring only and does not affect hours and earnings totals.
10. Enter the number of **Absence Hours**. This is the number of hours that employees will be given when approved absences are generated (such as Holiday, Vacation or Sick Time).
11. Enter the number of **Max Hours**. If employees working a shift assigned to this policy work more than the specified number of hours, their punches for the day will be flagged with an "Over Hours" error. This setting is used for Error Monitoring only and does not affect hours and earnings totals.
12. The system allows you to select the pay code that hours for employees assigned to this shift will receive. Make the desired selection from the **Base Pay Code** drop-down menu.
    Example: If employees working an overnight shift are to receive a higher rate of pay then for a daytime shift, the appropriate pay code would be selected.
13. Select the **Premium Pay Codes** that you would like to attach to this policy by selecting each code from the "Unselected" box and clicking on the icon. The codes are moved to the "Selected" box.
14. If you would like to assign this policy to a **Rounding Policy**, make the desired selection from the drop-down menu.
15. Click on the [SAVE] icon to save the Shift Policy.

Existing policies are displayed under the **Active** section of the main "Shift Policies" screen.

- To edit a policy click on the link in the **Name** column.
- The “Copy” link allows you to make a duplicate of the shift policy. This can be useful when creating multiple policies with similar settings.
- Click on the ✕ icon to inactivate a shift policy. The policy is moved to the **Inactive** section of the screen. Inactive policies are not used by the system, but are retained for later use. Click on the “Activate” link to re-activate an inactive policy.
- To permanently delete an inactive policy, click on the ✕ icon located to the right of the desired policy in the Inactive section of the screen.

Creating Shifts

This option allows you to create the shifts that your employees will be assigned to. A shift defines starting and ending times, Shift Policies and assigned department level.

1. Click on the main “Schedule” navigation tab, and then on either the [SHIFTS] icon located under the **Create/Edit** section of the screen, or on the Shift link in the row of links directly below the main program navigation tabs.
2. To add a new shift, click on the [CREATE SHIFT] icon located in the lower left-hand corner of the screen.
3. Enter a **Name** for this shift as you would like it to appear in the system.
4. Enter a **Start Time** in 24-hour format.
5. Enter an **End Time** in 24-hour format.
6. The **Duration Time** field automatically populates based on the specified start and end times.
7. Select the **Shift Policy** that you would like to assign this shift to from the drop-down menu.
8. Select the department level that you would like to assign this shift to from the **Department** drop-down menu.
9. Click on the [SAVE] icon to save the shift.

Existing shifts are displayed under the **Active** section of the main “Shifts” screen.

- To edit a shift click on the link in the **Name** column.
- The “Copy” link allows you to make a duplicate of the shift. This can be useful when creating multiple shifts with similar settings.
- Click on the ✕ icon to inactivate a shift. The shift is moved to the **Inactive** section of the screen. Inactive shifts are not used by the system, but are retained for later use. Click on the “Activate” link to re-activate an inactive shift.
- To permanently delete an inactive shift, click on the ✕ icon located to the right of the desired shift in the **Inactive** section of the screen.

Creating Schedule Templates

A Schedule Template allows you to create the schedules that your employees will be assigned to. A schedule defines the number of days or days of the week that the schedule will be in effect, as well as the shift that assigned employees will be scheduled to work.

1. Click on the main “Schedule” tab, and then on the “Schedule Template” link located in the row of links directly below the main program navigation tabs.
2. Click on the [CREATE TEMPLATE] icon in the lower left-hand corner of the screen.
3. Enter a **Name** for this template as you would like it to appear in the system.
4. Select either “Day of Week” or “Number of Days” from the **Recurrence** drop-down menu. The screen changes depending on your selection.

Day of Week

Select “Day of Week” from the **Recurrence** drop-down menu. Select either “Day” or “Shift” from the **Schedule By** drop-down menu.

You must save the Schedule Template before you can assign a shift to it. Click on the [SAVE] icon at the bottom of the screen.

Schedule By Day

A table appears displaying the days of the week. For each day, select the shift that you would like employees using this template to be scheduled to work. Click on the ⊕ icon to assign the shift.

Assigned shifts are displayed with their start and stop times. To remove a shift from a day click on the ✕ icon.

Once you have selected the desired shifts for the appropriate days of the week, click on the [SAVE] icon to save the changes that you have made.

Schedule By Shift

Select the desired shift from the drop-down menu and click on the [ADD] icon. The shift information is displayed.

Put a check mark in the box for each day of the week on which you would like employees using this template to be scheduled. Click on the [CHECK ALL] icon to select all days.

Click on the ✕ icon to remove a shift from the template.

Once you have selected the desired shifts click on the [SAVE] icon to save the changes that you have made.

Number of Days

Select “Number of Days” from the **Recurrence** drop-down menu.

In the **Number of Days** field enter the number of days for which you would like to assign shifts (this range of days is *not* specific to days of the week).

You must save the Schedule Template before you can assign a shift to it. Click on the [SAVE] icon at the bottom of the screen.

A table appears displaying the specified number of days. For each day, select the shift that you would like employees using this template to be scheduled to work. Click on the ⊕ icon to assign the shift.

Assigned shifts are displayed with their start and stop times. To remove a shift from a day click on the ✕ icon.

Once you have selected the desired shifts for the appropriate days, click on the [SAVE] icon to save the changes that you have made.

Scheduling an Employee

The following instructions walk you through using Shift Policies, Shifts, and Schedule Templates to create schedules for your employees.

There are two methods of scheduling in the system, “Assign by Schedule Template” and “Assign by Employee.”

Creating a Schedule by Template

This method of scheduling allows you to assign multiple employees to a schedule using the same schedule template.

1. Select “Schedule Template” from the **Assign Employee by** drop-down menu.
2. Select the desired **Schedule Template** from the drop-down menu. All employees assigned to this schedule will also be assigned to the template selected here.
3. Enter an **Effective Date** for this schedule. Click on the 📅 icon to select the date from a calendar.
4. To assign employees to this schedule click on the “Show Employees” link located to the right of the **Employees** field. The “Unselected” and “Selected” boxes appear.
    - Select the employees that you would like to assign to this schedule in the “Unselected” box.
    - Click on the » icon to select the employees. The employee names are moved to the “Selected” box.
    - To remove employees from the schedule, make the desired selections from the “Selected” box and click on the « icon.
    - The **Quick Search** box allows you to search for the desired employee by first and last names, ID and card number.

5. Click on the [SAVE] icon. A message appears which reads “The selected employees have been applied.” Click on the “Schedule View” link to view the created schedules.

Creating a Schedule by Employee

This method of scheduling allows you to create a schedule for multiple employees using different schedule templates for each.

1. Select “Employee” from the **Assign Employee** by drop-down menu.
2. Enter an **Effective Date** for this schedule. Click on the 📅 icon to select the date from a calendar.
3. Select the department level that you would like to assign this schedule to from the **Department** drop-down menu.
4. Your employees are listed in the **Employees** section of the screen. Select the appropriate **Schedule Template** for the desired employees.
5. Click on the [SAVE] icon. A message appears which reads “The selected employees have been applied.” Click on the “Schedule View” link to view the created schedules.

Viewing Schedules

Schedules can be viewed by day, week or month. The start dates and displayed employees are configurable.

1. Click on the main “Schedule” tab, and then on either the [VIEW SCHEDULES] icon in the **View** section of the screen, or on the “Schedule View” link located in the row of links directly below the main program navigation tabs.
2. The **Schedule View** field allows you to select a format for the displayed schedules.
    - **Daily:** Employee schedules are displayed in a table format with the hours of the day as table columns, and scheduled employees as table rows.

- **Weekly:** A weeks worth of schedules are displayed for the selected employees in a calendar format. On scheduled days the shift that the employee is scheduled to work is listed with the shift start and end times.
- **Monthly:** A monthly calendar is displayed for each selected employee. On scheduled days the shift that the employee is scheduled to work is listed with the shift start and end times.

3. Enter the desired **Start Date**. Click on the 📅 icon to select the date from a calendar. The schedule end date is defined by whether you have selected a daily, weekly or monthly schedule format.
4. By default, *all* employees will be included. If you would like to select specific employees only, click on the “Show Employees” icon in the far right of the **Employees** field. The “Unselected” and “Selected” boxes appear.
   - All of your employees are displayed in the “Unselected” box. If you would like to display employees from a specific department only, select the desired department from the drop-down menu.
   - From the “Unselected” box, select each employee that you would like to view and click on the » icon. The chosen employees are moved to the “Selected” box.
   - To remove employees, select the desired names from the “Selected” box and click on the « icon.
   - Use the **Quick Search** box to search for employees by first or last name, employee ID, or card number.

5. The **Sort By** field allows you to select how the displayed schedules are listed. Two levels of sorting can be specified. Sort by “Department,” “Supervisor,” “Last Name,” and “Employee ID.”
6. Put a check mark in the **Group Results** option if you would like the schedules to be broken up into separate sections based on your sort options. Without this option selected, all schedules are displayed on one screen.
7. Click on the [VIEW SCHEDULES] icon. The schedules are displayed in the bottom section of the screen.

Screen Output

The format of the information on the screen varies depending on whether you selected “Daily,” “Weekly” or “Monthly” schedules.

Daily Schedule View

The arrow icons on either side of the [VIEW SCHEDULE] icon allow you to scroll through schedule dates. The « and » icons scroll through a week at a time while the ‹ and › icons scroll through individual days.

The schedule is displayed in table format with the hours of the day as table columns, and the scheduled employees as table rows. A bar is displayed across the range of time during which each employee is scheduled for the day. The shift start and stop times are displayed in the middle of the bar. The number of scheduled employees during each hour is displayed at the bottom of every column.

Weekly Schedule View

The arrow icons on either side of the [VIEW SCHEDULE] icon allow you to scroll through schedule dates. The « and » icons scroll through a month at a time while the ‹ and › icons scroll through weeks.

The schedule is displayed in a graph format. The date is listed at the top of each column. For each day, the scheduled employees are displayed with the shift that they are scheduled to work. The total number of scheduled hours for the day is listed at the bottom of each column.

Monthly Schedule View

The arrow icons on either side of the [VIEW SCHEDULE] icon allow you to scroll through schedule dates. The « and » icons scroll through a year at a time while the ‹ and › icons scroll through months.

The schedule is divided into separate weeks. The date is listed at the top of each column. For each day, the scheduled employees are displayed with the shift that they are scheduled to work. The total number of scheduled hours for the day is listed at the bottom of each column.

Changing a Schedule

To edit an employee's schedule, click on the main “Schedule” navigation tab at the top of the screen and then on either the [VIEW SCHEDULES] icon in the **View** section of the screen, or on the “Schedule View” link located in the row of links directly below the main navigation tabs.

Enter the desired **Start Date** and select the **Employees** whose schedules you would like to edit and click on the [VIEW EMPLOYEES] icon. The found schedules are displayed below.

The employee's schedule is displayed using a blue bar labeled with the shift start and end times. Click on this bar to bring up the schedule details.

Make edits to the schedule as desired and click on the [SAVE] icon to save the changes that you have made.

Deleting a Schedule

Use the following instructions to remove a schedule from the system.

1. Click on the main “Schedule” navigation tab, and then on either the [DELETE SCHEDULES] icon in the **Delete** section of the screen, or on the “Delete Schedules” link in the row of links located directly below the main program navigation tabs.
2. From the drop-down menu, select the **Schedule Template** that you would like to delete schedules from.
3. Enter the desired **Effective Date**, or click on the 📅 icon to select the date from a calendar.
4. By default, *all* employees with schedules assigned to the selected template will be deleted. If you would like to select specific employees only, click on the “Show Employees” icon in the far right of the **Employees** field. The “Unselected” and “Selected” boxes appear.

- All of your employees are displayed in the “Unselected” box. If you would like to delete schedules for employees from a specific department only, select the desired department from the drop-down menu.
- From the “Unselected” box, select each employee that you would like to view and click on the >> icon. The chosen employees are moved to the “Selected” box.
- To remove employees, select the desired names from the “Selected” box and click on the << icon.
- Use the **Quick Search** box to search for employees by first or last name, employee ID, or card number.

5. Click on the [DELETE] icon. The selected schedules are removed from the system.

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