Infor Time Track for LN User Guide

Release 6.01.10

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Contents

Infor Time Track Module

This module includes topics that describe the forms in the Infor Time Track application for Factory Track LN.

About Infor Time Track

Infor Time Track collects attendance data, manages labor transactions, and organizes data for processing by your payroll and ERP applications. You can manage employee clock-ins and clock-outs for shifts, lunches, and breaks, and also track planned and unplanned absences. You can also manage job starts and stops and quantities of items produced by employees. Many useful reports for administrators and supervisors are accessible through an easy-to-use dashboard interface.

If you have the Warehouse Mobility module implemented, you can perform some Time Track transactions using a mobile scanner device. For more information, see "Using Time Track on a Mobile Scanner" on page 33.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal.

If we update this document after the product release, we will post the new version on this website. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Overview

1

This module includes topics that describe Infor Factory Track LN features for time track and how to use the transactions and forms.

Absence Tracking Overview

You can track specific absence codes for planning or supervision purposes, or, conversely, you can leave specific absence codes untracked to reduce the amount of data that needs to be monitored. For example, you can decide to track the absence hours usage and remaining balances for absences that are used at employees' discretion, such as vacations, while deciding not to track unexpected absences, such as jury duty or unpaid leave, that may be less useful for planning.

To configure absences as tracked or untracked:

1. On the Absences form, configure absence codes as tracked or untracked.
2. On the Time Off Group Parameters form, add absence codes to time off groups.
3. On the Employees form, assign employees to time off groups.
4. On the Employee Types form, select whether to use the absence approval system for employee types.
5. On the Work Groups form, designate which supervisors can approve and deny time off requests.
6. Optionally, set up email notifications for absence requests. See "Setting Up Email Notifications for Absence Requests" on page 73 for more information.
7. On the Create New Absence Tracking Year form, create a new tracking year for the current year.

Clocked Hours Overview

You can use Clocked Hours to track attendance and labor time for employees. Employees must clock in and out and start and stop jobs to record attendance and labor time. If Clocked Hours is used, all attendance time must be recorded by labor time. Clocked Hours allows a high degree of control through the configuration of shifts and Employee types. Clocked Hours is the default employee type setting.

To configure employees as clocked employees make sure Elapsed Time Data Capture on the Employee Types form is set to No. See *Configuring Employee Types* for more information about configuring employees to use clocked hours.

To record and process clocked hours:

- Record the attendance and labor activity on these these Time Track transaction forms:
  - Employee Home Page for touch screen and multiple user data capture.
  - Dashboard Transaction for supervisor corrections and kiosk users.
  - Warehouse Mobility to capture the data with a scanner.
- Verify the Hours Summary and Hours Detail forms for errors and prepare the records for processing.
- Approve and process multiple records on the Hours Summary form.

Elapsed Time Overview

You can use elapsed time to track labor time for employees without requiring them to clock in and out or start and stop jobs. To configure employees to use elapsed time, select **Elapsed Time Data Capture** and set elapsed time parameters on the Employee Types form. See "Configuring Employee Types" on page 80 for more information about configuring employees to use elapsed time.

To record and process elapsed time:

1. Use the Elapsed Time Details form to create elapsed time records.
2. Use the Elapsed Time Details form to approve records for a report date.
3. Use the Elapsed Time Daily Summary form or Elapsed Time Weekly Summary form to approve and process records for a pay period after they have been created and approved by the relevant employee.

Using Toolbar options

Use Time Track toolbar buttons to perform common tasks and procedures. Different button sets are available depending on the form you have accessed.

S.No.	Toolbar option	Description
1	**Save Selections**	Saves a set of the selection crite-ria.
2	**Restore Selections**	Reloads the last saved set of the selection criteria.
3	**Authorize Exceptions**	Authorizes all exceptions and validate the selected records.

S.No.	Toolbar option	Description
		Select the record and click **Re-open** to clear the authorized status.
4	**Gap Fill**	Adds the Gap Fill task (defined in the Employee Type form) in any unassigned durations during the selected shift record.
5	**Remove Gaps**	Deletes the Gap Fill tasks that are generated for the selected shift record.
6	**Generate Absence**	Adds a full-shift default absence on the selected shift record.
7	**Select All**	Selects all the displayed records.
8	**Deselect All**	Deselects all the displayed records.
9	**Approve**	Approves the employee record. This is the first step of the two-step sign-off process. Approved records can be edited.
10	**Process**	Locks in the approved record. This is the second step of the two-step sign-off procedure. Processed records can be edited only if reopened.
11	**Approve and Process**	Approves and processes the record. Processed records can be edited, only if reopened.
12	**Reopen**	Saves the processed record to an open (edit) status or clears authorizations for the open record. Records that have already been payroll processed cannot be reopened. For kiosk users, this option reverses the approval, but does not reopen the record. Kiosk users cannot edit processed records.
13	**Schedule Change**	Configures temporary schedule changes. Employees clock in and clock out at different times from the scheduled shifts.

S.No.	Toolbar option	Description
14	**Shifts**	Configures shift parameters, such as description, shift types, core hours, and shift premiums.
15	**Planned Absence**	Creates an absence status for a selected date or selected date range for each record.
16	**Holiday Calendar**	Displays scheduled holidays for the current facility.
17	**Absence Calendar**	Displays planned leaves for the selected employee for a tracking year.
18	**ABS Summary Balance**	Displays absence tracking activity and available balances for the selected employee for a tracking year.
19	**Teams**	Displays the information for the specified team that includes the current job and employees working in the team.
20	**Transactions**	Opens the Dashboard Transactions form, where you can clock in, clock out, start a job or task, report quantities completed, and record absences.
21	**Payroll Summary**	Opens the Payroll Summary form, where hourly records and perform administrative functions for a specified payroll schedule are displayed.
22	**Employees**	Opens the Employees form, where employee account information can be configured. Select an employee in the Hours Detail form to access the information.
23	**Save**	Saves the edited records
24	**Delete**	Deletes a record. Job records without reported quantities, indirect task records, and absence records can be deleted. Clock-in records, clock-out records, and

S.No.	Toolbar option	Description
		jobs with reported quantities cannot be deleted.
25	**Correct Errors**(Hours Detail form)	Checks for excess clocked hours. Updates attendance transactions to scheduled punch times.
26	**Dynamic Shifts**	Use the duration between clock in and clock out to determine overtime calculations. Preferred with Weekly, Daily and Weekly and California OT methods.
27	**Static Shifts**	Use specified times of day to determine overtime. Preferred when using the Daily OT method
28	**Clear Error Messages**(Hours Detail form)	Clears error messages from the dashboard.
29	**Calculate Premium** (Payroll Details & Payroll Summary form)	Displays premiums next to each clocked-hours or absence-hours record that is eligible for a premium. Premiums are calculated automatically when payroll is processed, so this step is optional.
30	**Payroll Process** (Payroll Details &Payroll Summary form)	Locks records, calculates premiums, and updates status for all the selected records to Payroll Processed. This step is required to generate a payroll extract.
31	**Hours Summary**	Opens the Hour Summary form for the respective Payroll Summary form.
32	**Hours Detail**	Opens the Hours Detail form for the respective Payroll Detail form.
33	**Payroll Details**	Opens the Payroll Detail form for the respective Payroll Detail form.
34	**Restore Payroll to Submitted**	The user is given the privilege to revert payroll if the Restore Payroll to Submitted privilege on the Work Groups form is set to Yes. If the Allow Revert Processed Payroll checkbox is selected in the Site Parameter form, payroll

S.No.	Toolbar option	Description
		can be reverted from the Processed status to the Submitted status and the icon is enabled in both the Payroll Summary and Payroll Detail forms.
35	**TimeSheet Summary**	Opens the Time Sheet Summary form for the respective Payroll Summary form.
36	**Supervisor Time Off Request Disposition**	Opens the Supervisor Time Off Request Disposition form for the detailed level and calendar level work group information sheet along with the supervisor's comments for the employee's request.
37	**Incident Forgiveness**	Sets the incident to Forgive status. This is only active when the Attendance Points System is in use.
38	**Post To ERP**	Posts the selected records to the selected ERPs.
39	**TimeSheet Detail**	Opens the Time Sheet Detail form for the respective Payroll Detail form.
40	**Revert Complete**	Clears the operation complete setting. Updates hours that are set to complete by the employee at the transaction point.
41	**Machine Time Details**	Displays the machine hour detail for an employee for a job operation from the Hours Detail form.
42	**Get Favorite Job**	Selects a job from the favorite job list.
43	**Export** (Payroll Summary and Payroll Details form)	
44	**Reopen Payroll** (Payroll Summary and Detail forms)	Reopens an extracted record. This can be edited, saved, and extracted again.

Transaction processing

2

This chapter includes the transaction process related to the Time Track module of in the Factory Track application.

These are the transaction types explained in the Time Track module:

- Attendance: This transaction is used to start or stop the Clocked Time. Attendance transaction also includes Clock In an Out, Lunch In and Out and Break In and Out. All Clocked Time must record labor activity.
- Labor: This transaction displays Clocked Time by starting and stopping indirect and direct labor tasks. Labor transaction also includes, Job Start and Stop on Indirect Task, Production Order, Project, PCS Project, Service Order and Depot Order.
- Machine: This transaction applies Machine Time to a specified order and operation. The Machine Time can be specified as a ratio on the Labor transactions of an employee or specified independent of employee labor activity.
- Absence: This transaction is used for scheduled but unclocked time. See *Absence Management* for details on absence hours.

Clock In/Out

Use the Clock In to start the clocked time for the day. Use the Clock Out to stop the clocked time for the day.

See *Clocking In* and *Clocking Out* for more information.

Lunch In/Out

Use the Lunch Out to stop the clocked time for the purpose of lunch. Time Track has no jurisdiction over an employee with status set to Lunch Out. The employee is not being paid in that period and maintaining the record of this time is not required. Lunch In is the attendance transaction that follows a Lunch Out transaction. Lunch in marks the return to Clocked Time.

See *Clocking In from Lunch* and Clocking Out for Lunch for instructions on using this transaction.

See *Configuring Shifts* for more information.

Break In/Out

Use the Break Out transactions to stop Clocked Time when the employee is going on a break. Use Break In when the employee returns from the break to Clocked Time. Break In is the attendance transaction that follows a Break Out transaction.

See *Clocking In from a Break* and *Clocking Out for a Break* for more information.

See *Configuring Shifts* for more information.

Starting Jobs

When using the Time Track module, you can start jobs, projects, or tasks using the Dashboard Transactions form.

To start jobs using the Warehouse Mobility module, see Using Warehouse Mobility on a Mobile Scanner.

Employees who are workset eligible add multiple jobs to a workset, then start the entire workset. If you attempt to start a workset before jobs have been added, an error displays. Employees who are not workset eligible start a single job. There are six types of jobs that can be started:

- Assembly
- Indirect
- PCS Project
- Project
- Service
- Work/Depot

Note: You also can perform these transactions on a remote scanner device using the Job Booking transaction. See "Starting Jobs Using Time Track and Warehouse Mobility" on page 40 for instructions on using the Job Booking transaction.

See "Starting Jobs for Non-workset Eligible Employees or for Machines".

See "Starting Worksets for Workset Eligible Employees".

See "Using Stop-Start on the Realtime Transaction Entry (Touch Screen Form)"

Stopping Jobs

When using the Time Track module, you can stop jobs, projects, or tasks using the Dashboard Transactions form.

To stop jobs using the Shop Floor module, see Labor and Material Transactions Overview.

To stop jobs using the Warehouse Mobility module, see Using Warehouse Mobility on a Mobile Scanner.

To stop a job, click **Stop/Start Job** on the Dashboard Transactions form.

To stop a workset:

1. Open the Dashboard Transactions form.
2. Click **Remove Job From Workset**.
3. Click **Stop Workset**.

Using Time Track from the Employee Home Page

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The Employee homepage is used to configure a generic user, if the Factory Track application and Factory Track Time Track module is implemented (see Defining Time Track Roles for more instructions). The employees can access the Time Track transactions with single sign on from the Employee Home Page. **Employee ID** or **Badge Number** must be specified to access the forms from the Employee Home Page. Access to the forms is configured in the employee record on the Employees form (see Configuring Employee Record for more instructions). The Employee Home Page displays the AttendanceTransaction.TS form, the Realtimetransactionentry.ts form, MachineTimeEntry.ts form, TimesheetSummary.TS form and the EmployeeAbsenceRequest.TS form.

These Attendance transaction forms are displayed on the Employee Home Page:

- Clock In
- Clock Out
- Lunch Out
- Lunch In
- Break Out
- Break In
- Job Start
- Job Stop-Start
- Job Stop

These Machine Time Entry transaction forms are displayed on the Employee Home Page:

- Machine Start
- Machine Stop

These Timesheet Summary transaction forms are displayed on the Employee Home Page:

- Print Timesheet Summary
- Sign Timesheet Detail

The Request Absence transaction of the Employee Absence Request form, is displayed on the Employee Home Page.

Using the Attendance transaction form

Use the attendance transaction forms to start and stop the employee working hour. The Attendance transaction form is ideal for positioning at points of entry and depature to process a large volume of attendance transactions in a short amount of time (ie, shift start or end).

To use the Attendance transaction form:

1 Logon to **Employee Home Page** and select **Attendance** transaction forms. The current date and time are defaulted on the form.
2 Specify the **Badge Number**. The transaction options related to the Badge Number are displayed.

   Note:

   - An error message is displayed, if the employee is not authorized to access the labor transaction form.
   - See *Configuring Employee Records* for instruction on the employees transaction execution privileges

3 Click **Close**. The Employee Home Page is displayed.

Using the Real Time Transaction Entry form

Use the Real Time Transaction Entry form to

To use the Real Time Transaction Entry form:

1 Logon to the Employee Home Page and select **Real Time Transaction Entry**. The current date and time is defaulted on the transaction form.
2 Specify the **Employee ID** and **Badge Number**. Employee ID or Badge number is verified to confirm the clocked in status and access to the labor transaction options.

   Note:

   - An error message is displayed, if the employee is not authroized to access the labor transaction forms. See *Configuring Employee Records* for information on the transaction access to the employees.
   - The Real Time Transaction Entry form is displayed only if the employee is clocked in.
   - If the employee is working on a job, the job information is defaulted on the form.
   - **Order Type** must be specified, if the employee is not working on a job.

3 Execute the transaction. The Employee home page is displayed if the execution is successful.

   Note: The transaction form can be closed without executing the process.

Using the Real Time Transaction Entry form to Start Jobs for a Single Booker

A Single Booker is an employee that can work only on one job at a time. The Single Booker is not a Workset employee. Workset employees can work on several jobs at a time. Their labor time is then prorated across the jobs that are running at the same time. Labor and Machine time may be prorated within a workset. Each a proration method may be selected for each hours type.

To start a job for single booker on the Real Time Transaction Entry form:

1. Validate the **Badge** number to authenticate if the employee is a non workset-enabled employee. The **Start Job** and **Stop Job** options are displayed on the form
2. Select the value in the **Order Type** field. The fields related to the specified Order Type value are displayed.

   See *Configuring the Employee Record* for more information on defining a default value for the Order Type field.
3. Select the Order Type value.
   - Direct: To start the job for a non workset-enabled employee, specify this information:
     - Order Number: The job assigned to the employee.
     - Project Number: The project number, if the Order Type value is Project.
     - Depot:
     - Activity: The activity code of the project assigned to the employee.
     - Task Code: The code of the job assigned to the employee.

       Note:
       - The code is not displayed if the Order Type value is Depot.
       - The code is defaulted if the Order Type value is PCS Project or Production Order.
     - Machine: The machine name or number related to the Production Order.

       Note: This field is only displayed, if the **Order Type** value is Production Order.
     - Machine Ratio: The machine ratio determines the labor time that is reported for the machine. Example: If the value is 0.5, the labor time that is reported for the machine is considered as half.

       Note: The value in this field is defaulted if the **Combine Labor and Machine Time** checkbox is selected in the Employees form. However, the value can also be modified on the transaction form.
   - Indirect: Start the job for a non workset-enabled employee:
     - Specify the **Task Code** and **Description** of the task code.
     - Click **Start Job**. The Employee Home Page is displayed if the job is started successfully.

     Note: An error message is displayed if the validation of Badge number is not successful and also when the job is not started successfully.

Starting Worksets for workset-enabled employees using the Employee Home Page

Employees who are workset enabled can add multiple jobs to a workset and start the workset. An error is displayed, if a Workset is started before adding all the jobs. Employees who are non workset- enabled, can only start a single job. All Order Types values can be used to start the Workset. A combination of Order Type values can also be used to start the Worksets.

To start a Workset for a workset-enabled employee:

1 Specify the **Badge** number on the Workset transaction form. The application validates the Badge number to verify if the employee is workset enabled. The **Add Job**, **Remove Job**, **Start Workset** and **Stop Workset** options are displayed on the form.

2 Select the **Order Type** value for the job that is added to the Workset.

   Note:

   - If there is only one job, start the Workset after the Workset is added.
   - Select the **Workset** tab to review the job added to the workset.

3 Specify the **Order Type** value for the second job and click **Add**.

4 Specify a value in the **Machine Ratio** field. This is displayed only when the **Order Type** value is **Production Order**.

5 Select the Workset Tab to review the jobs added to the work set.

   Note:

   - If no **Start Time** for the job is displayed, then the staus of the Workset is **Adding**.
   - If the **Start Time** for the job is displayed, the workset is in the Running status.

6 Select **Start Workset** to start the job.

   Note:

   - All the job in the Workset starts simultaneously.
   - The Real Time Transaction Entryform closes:
     - If the employee uses the (Close icon) to exit the form and the Workset is not started.
     - If the employee uses the Real Time Transaction Entry form to add job to the Worksets with the status set to Running.

   Note: Job can be added to the Worksets with the status set to Running. If the Workset is stopped, no job is added. The start time of the job is the time considered to start the job is added to the workset. Only the time where jobs are overlapping will be used to prorate time.

   The Workset tab displays the status of the Workset. The Workset with the status set to Running displays the job with a start time.

   To add a job to the workset:

   - Select the **Workset** tab. The job with the status set to Running is displayed.
   - Modify the value in the Order Type field with the order information of the job that is to be added.
   - Select Add Job. The new job appears on the Workset tab with the start time.

Note: Add additional jobs, if any. Click **Close** to exit the form.

Stopping Jobs or Worksets Using the Employee Home Page Form

1 To stop a job for an non workset enabled employee (Single Booker):

- Select **Real Time Transaction Entry** on the Employee Home Page form.
- Specify the **Badge** number. The current job is displayed on the **Detail** tab.
- Specify the value in the **Machine Ratio** field, if the value in the **Order Type** field is **Product Order**.

  Note: The value in the **Machine Ratio** field is defaulted, if the **Combine Labor and Machine Time** checkbox is selected in the Employees form.

- Click **Complete Operation** to complete the current operation. No additional quantities can be completed or rejected for an operation once it is completed.
- Click **Stop Job**. The Employee Home Page is displayed.

  Note: An error message is displayed if stopping the job is unsuccessful.

2 To stop a workset:

- Select **Real Time Transaction Entry** on Employee Home Page.
- Specify the **Badge** number. The workset with the status, **Running** is displayed on the **Workset** tab and the current job is displayed on the **Detail** tab.
- Click **Remove Job** on the Workset tab to report quantities and to set the status of the operation to **Complete**.
- Select **Complete All** if multiple worksets are set to the status, **Complete**.

  Note:

  - Reports open quantities on all the job in the Workset and sets the operations to complete.
  - No additional quantities can be completed or rejected for a job after the status is set to Complete.

- Click **Stop Workset**. All jobs in the workset are stopped.

  Note:

  - Jobs may not be added, edited or deleted, after the workset is stopped.
  - See *Using Hours Detai*l for more information on editing Worksets.

3 To remove jobs from a workset:

- Select **Real Time Transaction Entry** on Employee Home Page.
- Specify the **Badge** number. The workset with status, Running, is displayed on the **Workset** tab and the current job to be added to the workset is displayed on the **Detail** tab.
- Select the job as the current job on the **Workset** tab.

- Specify the value in the **Completed Quantity**, the **Rejected Quantity**, and the **Reason Code** field.
- Click **Complete Operation** to complete the current operation. No additional quantities can be completed or rejected for an operation when the operation is completed.
- Select a job to be removed and click **Remove From Workset**. The job added first to the workset is displayed as the current job.
- Select the next job to remove.

  Note: When the last job is removed from the workset, the Real Time Transaction Entry form is closed and the Workset is stopped.

Using Stop-Start on the Real Time Transaction Entry form

Stop-Start can be used with single job or the Worksets. The objective of Stop-Start job is to streamline the transition from one labor activity to another by stopping the job automatically, when a new job starts.

1. To Stop-Start a single job:
   - Select **Real Time Transaction Entry**on the Employee Home Page.
   - Specify the **Badge** number. The current job is displayed.
   - Specify the Machine Ratio.

     Note: The value in this field is defaulted if the Combine Labor and Machine Time checkbox is selected in the Employees form. However, the value can also be modified on the transaction form.
   - Specify the value in the **Completed Quantity** and the **Rejected Quantity** field. Also specify a reason in the**Reason Code** field, if the quantity is rejected.
   - Select **Complete Operation** to complete the current operation. No additional quantities can be completed or rejected for an operation after the operation is set to the status, **Completed**.
   - Click **Stop-Start**. A new Transaction Entry form is displayed with the default **Badge** number.
   - Specify the **Job Order** value.
   - Click **Back**. The job with the status, Running, is displayed.
   - Click the **Stop-Start** option to stop the running job and start a new job. The Employee Home Page is displayed.
2. To Stop-Start a Workset:
   - Select **Real Time Transaction Entry** on the Employee Home Page.
   - Specify the **Badge** number. The workset with the status, Running is displayed on the **Workset** tab and the current job is displayed on the **Detail** tab.

     Note:

     - Specify the value in the **Order**, the **Order Type** and the **Order Number** field.
     - Click **New Workset Add** to update the specified order.

  - Adding the first job creates the next Workset header and updates the job to that header.

- Click **Stop-Start**. A new transaction entry form is displayed with the employee number.
- Click **Back**. The Real Time Transaction Entry form is displayed with the last value.
- Select the order type and order information of the first job that is added to the new Workset.

  Note:

  - If there is only one job to start, click Stop-Start Workset directly.
  - Select the **Add** tab to review the new Workset.

- Specify the value in the **Order** field. When the value in the **Order** field is validated, select **Add Job**.
- Specify a machine ratio if the value selected in the **Order Type** field is **Production Order**. The value in this field is defaulted, if the **Combine Labor and Machine Time** checkbox is selected in the Employees form. However, the value can also be modified on the transaction form.
- Select the Add tab to review the jobs in the workset.

  Note:

  - If no start time is displayed for the jobs, the Workset is set to the status Adding.
  - The start time is not displayed for the jobs in the new Workset.
  - Select a job on the **Workset** tab. This job is considered as the current job. The value in the **Order** field of the current job is defaulted.
  - Click **Remove** to delete the current job from the workset.

- Click **Stop Start** to stop the job with the status, **Running** and start a new job. The Employee Home Page is displayed.

Using the Employee Home Page to start and stop the machine transactions

1 To start a Machine transaction:

- Select **Machine Time** on the Employee Home Page.
- Specify the value in the **Order Number** and the **Operation** field.
- Click **Start Job**. The details of the current job are displayed on the **Detail** tab.

Note: The Employee Home Page form is only available if you have the Time Track module implemented.

2 To stop a Machine transaction:

- Select **Machine Time** on the Employee Home Page.
- Specify the value in the **Order Number** and **Operation** field.
- Specify the value in the **Completed Quantity**, the **Rejected Quantity** field. Specify the value in the **Reason Code** field, if the quantity is rejected.

- Click **Complete Operation**. No additional quantities can be completed or rejected for an operation, after the job is completed.
- Click **Stop Job**.

Using Employee Home Page to view Timesheets

To view timesheets using Employee Home Page form:

1. Select **View Timesheets** on the Employee Home Page.
2. Specify the **Badge** number.
3. Specify a date range to view timesheet records. This information is displayed for each timesheet record:
    - Date
    - Regular hours
    - Overtime hours
    - Double time hours
    - Overtime eligible vacation hours
    - Overtime eligible holiday hours
    - Other overtime eligible hours
    - Hours not eligible for overtime
    - Unpaid hours
    - Total hours for the day
4. Select **Left** to review the timesheet of the last week, or select **Right** to review the timesheet of the next week.
5. Click **Print Timesheet** to print the currently displayed records.
6. Click **Detail** to review the additional hour details for the selected date range.

Using Employee Home Page to submit absence requests

See Absence Management for instructions on how to use this feature.

Using the Dashboard Transactions Form

4

The Dashboard Transaction form is used by supervisors to update labor or attendance transactions. This tool is used when the employee fails to report a transaction in real time. It is designed to be used by named users. It uses the logged in user profile to determine access and privileges.

See *Clocking In Using the Dashboard Transactions* form.

See *Clocking Out Using the Dashboard Transactions* form.

See *Starting Jobs for Non-workset Eligible Employees or for Machines*.

See *Starting Worksets for Workset Eligible Employees*.

See *Stopping Jobs*.

Clocking In Using the Dashboard Transactions Form

To clock in using the Dashboard Transaction form:

1. Specify the **Badge** number.
2. Specify the date and time of the transaction

   Note:

   - Validation of the Badge number is done to verify the employee's shift details and to determine if a report date can be modified. The Report Date is displayed.
   - The **Clock In** option is displayed.

3. Click **Clock In**. The fields for adding the jobs are displayed. A successful Clock In message is displayed on the Job Detail form.

   Note: An error message is displayed if the Clock In is not successful.

Clocking Out Using the Dashboard Transactions Form

To clock out using the Dashboard Transactions form:

1 Specify the **Badge** number.
2 Specify the date and time of the transaction.

   Note:

   - Validation of the Badge number is done to verify the employee's shift details and to determine if a report date can be modified. The Report Date is displayed.
   - The Clock out option is displayed.
   - If the break and lunch time is calculated, the transaction icons are displayed.

3 Click **Clock Out**. A successful Clock Out message is displayed on the Jobs Detail form.

   Note:

   - If selecting **Clock Out** can stop the jobs, the stop time is updated for the running job.
   - See *Configuring Punch Parameters* for instructions on configuring attendance transactions for auto stop and auto start.
   - An error message is displayed if the clock out is unsuccessful

Starting jobs for non-workset enabled employees or machines using the Dashboard Transactions form

To start jobs for non workset-enabled employee or machine:

1 Access the Dashboard Transactions form.

   Note: The Dashboard Transactions form is only available if the Time Track functionality is implemented.

2 Select the value **Machine** in the **Transaction Mode** field, if Machine job starts manually.
3 Select the value in the **Order Type** field.

   Note: If the value in the **Order Type** field is **Production Order**, **Service Order**, **Setup**, or **Machine**, then the value in the **Order number**, **Suffix**, and **Operation** field must be specified.

4 Specify the Machine Ratio. The machine ratio determines the labor time that is reported for the machine.

   Example: If the value is 0.5, the labor time that is reported for the machine is considered as half.

   Note: The value in this field is defaulted if the **Combine Labor and Machine Time checkbox** is selected in the Employees form. However, the value can also be modified on the transaction form.

5 Specify the next operation number in the **Next Operation** field.

Note:

- If the **Out Of Sequence** checkbox is cleared in the Employee Types Form, the **Next Operation** field displays the next operation numbers in sequence.
- If the **Out Of Sequence** checkbox is selected in the Employee Types Form, the next sequential operation is defaulted in the Next Operation field. The user can only specify one of the available operation numbers from the list (an open operation in the job's routing).

  The validation of the Out of Sequence operation confirms that the operation is with the status, Open (only Open operations are listed in the Next Op pulldown). If the status of the selected operation is set to Complete, the quantities cannot be moved to the completed operation. A message for the successful completion of the selected operation is displayed. When the message is cleared, the application restores the default value of Next Operation.

6 Specify the value in the **Task Code** field, if the value in the **Order Type** field is **Indirect Task**.

7 Specify the value in the **Project Number**, the **Task Number**, and the **Cost Code** field, if the order type is Project.

8 Click **Start Job**. The details of the current job is displayed on the Current Job screen.

Starting Worksets for workset-enabled employees using the Dashboard Transactions form

To start the Workset for the workset-enabled employees:

1 Access the Dashboard Transactions form.

Note: The Dashboard Transactions form is only available if you have the Time Track functionality implemented.

2 Select the value in the Order Type field.

Note: If the value in the **Order Type** field is **Production Order**, **Service Order**, **Setup**, or **Machine**, then the value must be specified in the **Order number**, **Suffix**, and **Operation** field.

3 Specify the value in the **Machine Ratio** field. The machine ratio determines the labor time that is reported for the machine.

Example: If the value is 0.5, the labor time that is reported for the machine is considered as half.

Note: The value in this field is defaulted if the **Combine Labor and Machine Time** checkbox is selected in Employees form. However, the value can also be modified on the transaction form.

4 Specify the task code, if the order type is **Indirect Task**.

5 Specify the value in the **Project Number**, the **Task Number**, and the **Cost Code** field, if the order type is **Project**.

6 Click **Add Job to Workset**to update the job details.

7 Add all the jobs in the Workset.

8 Click **Start Workset**, after all the jobs are added to the Workset. The current job is displayed.

9 Select a job from the active Workset to be the current job.

Stopping Jobs or Worksets Using the Dashboard Transactions Form

To stop a job, click **Stop/Start Job**on the Dashboard Transactions form.

To stop a workset:

1 Access the Dashboard Transactions form.

2 Click **Remove Job From Workset**.

3 Click **Stop Workset**.

Employees who are workset enabled, can add multiple jobs to the Workset and start the Workset. If you attempt to start a workset before jobs are added, an error message is displayed. Employees who are not workset enable can start a single job.

There are six types of jobs that can be started:

- Production Order: Orders that involve the completion of production operation quantities.
- Service Order: Orders that involve the completion of service operation quantities.
- Indirect Task: Tasks that do not involve the completion of operation quantities; examples include facility maintenance and meetings.
- Setup: Initial set up time required before work is started.
- Machine: Time during which a machine is in use; this order type is only used to report machine time manually and cannot be used as part of a Workset or a team job.
- Projects: Collections of manufacturing and purchasing actions that can comprise multiple orders.

Note: You can also use scanner to perform the transactions.

Using Time Track on a Mobile Scanner

5

If you have the Warehouse Mobility module implemented, you can use Infor Time Track on mobile scanner devices to perform production, labor collection, time, and attendance transactions. To perform inventory, production, picking, put away, receiving, and shipping transactions on a mobile scanner device, see Using Warehouse Mobility on a Mobile Scanner for more information.

These mobile scanner transactions are available using Time Track:

- Clock In/Out
- Break In/Out
- Lunch In/Out
- Time Attendance
- Job Booking

Clock In/Out

Use the Clock In/Out transaction to clock in and out.

See *Clocking In* and *Clocking Out* for more information.

Break In/Out

Use the Break In/Out transaction to clock in and out for breaks.

See *Clocking In from a Break* and *Clocking Out for a Break* for more information.

Lunch In/Out

Use the Lunch In/Out transaction to clock in and out for lunch.

See *Clocking In from Lunch* and *Clocking Out for Lunch* for more information.

Time Attendance

Use the Time Attendance transaction to perform these activities:

- clock in at the beginning of the day
- clock out at the end of the day
- clock out for a break

- clock in from a break
- clock out for lunch
- clock in from a lunch

See *Using the Time Attendance Transaction* for more information.

Job Booking

Use the Job Booking transaction to start and stop jobs for employees and machines. The time the employee spends working on the job is recorded and attributed to the job in your ERP system. You can start and stop these job types:

- production orders
- setup activities
- indirect tasks
- projects
- machine jobs
- service orders

See *Starting Jobs* and *Stopping Jobs* for more information.

Time Attendance

When using the Time Attendance transaction the application determines the appropriate punch based on the employee’s shift and prior punches. Use the Time Attendance transaction to perform these activities:

- Clock in at the beginning of the day.
- Clock out at the end of the day.
- Clock out for a break.
- Clock in from a break.
- Clock out for lunch.
- Clock in from a lunch

See *Using the Time Attendance Transaction* for more information.

Job Booking

Use the Job Booking transaction to start and stop jobs for employees and machines. The time the employee spends working on the job is recorded and attributed to the job in your ERP system. You can start and stop these job types:

- Production orders
- Setup activities
- Indirect tasks
- Projects
- Machine jobs
- Service orders

See *Starting Jobs and Stopping Jobs* for more information.

Clocking In

You must have the Time Track module implemented to clock in. You can clock in using the Dashboard Transactions form.

See *Clock In Using the Dashboard Transaction* form.

If you have the Warehouse Mobility module implemented, you can also clock in using a mobile scanner device. See *Using Time Track on a Mobile Scanner*.

Clocking In

When Time Track or Infor Cloud Suite Industrial Time and Attendance are implemented use the Clock In/Out transaction to clock out.

Note: When the Infor Cloud Suite Industrial Time and Attendance Implemented parameter is set to true, then **Clock In/Out** button creates a record in the Syteline related table and clocks an employee in, according to the rules:

- If the employee’s clock in time is greater than or equal to (the shift start time minus **Shift Early In**) and the employee’s clock in time is less than or equal to (the shift start time plus **Shift Late In**, then the clock in time is set to the shift start time.
- When the employee’s clock out time is greater than or equal to (the shift end time minus **Shift Early Out**) and the employee’s clock in time is less than or equal to (the shift end time plus **Shift Late Out**, then the clock out time is set to the shift end time.
- When the employee’s clock out time is greater than the shift’s end time plus the **Shift Late Out**, then the clock out time is set to the actual time.
- On clock out when the employee has a job that has not been ended, then the open job must be ended. The open job can be ended automatically by the clock out process or manually. When the job is automatically ended then the job’s end time is the employee’s clock out time (any clock out adjustments are made before setting the job time). When the employee’s last job has been end, but does not equal the clock out time, then the job’s end time must be adjusted according to the job adjustment rules.

On the Main Menu, select the **Time and Attendance** menu for icon based link.

1 Click **ClockIn/Out**.
2 Specify this information :

Date
Verify that the correct date is displayed. Edit if necessary. The user can only edit the date when the edit date time parameter on the User Extensions form is checked.

Time
Verify that the correct time is displayed. The user can only edit the date time when the edit date time parameter on the User Extensions form is checked.

Employee
Scan your employee ID number.

3 Select **Submit**.

Clocking Out

You must have the Time Track module implemented to clock out. You can clock out using the Dashboard Transactions form.

See *Clocking Out Using the Dashboard Transactions Form*.

If you have the Warehouse Mobility module implemented, you can also clock out using a mobile scanner device.

See *Using Time Track on a Mobile Scanner* for more information.

Clocking Out

When Time Track or Infor Cloud Suite Industrial Time and Attendance are implemented, use the Clock In/Out transaction to clock out.

To clock out:

1 On the Main Menu, click **Time and Attendance** menu.
2 Click **ClockIn/Out**.
3 Specify this information:

Date
Verify that the correct date is displayed. Edit if necessary. The user can only edit the date when the edit date time parameter on the User Extensions form is checked.

Time
Verify that the correct time is displayed. Edit if necessary. The user can only edit the time when the edit date time parameter on the User Extensions form is checked.

Employee
Scan your employee ID number.

4 Select **Submit**.

Clocking In from a Break

Use the Break In/Out transaction to clock in from a break.

You must have the Time Track module implemented to use the Break In/Out transaction. If you do not have the Time Track module implemented, use the Start/Stop Shift transaction to clock in from a break. See Starting Shifts and Stopping Shifts for instructions on using the Start/Stop Shift transaction.

To clock in from a break:

1 On the Main Menu, tap **TT Trans**.
2 Tap **BreakIn/Out**.
3 Specify this information:

Date
Verify that the correct date is displayed. Edit if necessary. You can only edit the date if you are authorized to do so on the User Extensions form.

Time
Verify that the correct time is displayed. Edit if necessary. You can only edit the date if you are authorized to do so on the User Extensions form.

Employee
Scan your employee ID number.

4 Select **Submit**.

Break In/Out

Use the Break In/Out transaction to clock out for a break.

To clock out for a break:

1 On the Main Menu, click **Time and Attendance** menu.
2 Click **BreakIn/Out**.
3 Specify this information:

Date
Verify that the correct date is displayed. Edit if necessary. The user can only edit the date when the edit date time parameter on the User Extensions form is checked.

Time
Verify that the correct time is displayed. Edit if necessary. The user can only edit the time when the edit date time parameter on the User Extensions form is checked.

Employee
Scan your employee ID number.

4 Select **Submit**.

Lunch In/Out

When Time Track or Infor Cloud Suite Industrial Time and Attendance are implemented use the Lunch In/Out transaction to clock in/out from lunch

To clock in from lunch:

1 On the Main Menu, click **Time and Attendance** menu.
2 Click **LunchIn/Out**.
3 Specify this information:

Date
Verify that the correct date is displayed. Edit if necessary. The user can only edit the date when the edit date time parameter on the User Extensions form is checked.

Time
Verify that the correct time is displayed. Edit if necessary. The user can only edit the date time when the edit date time parameter on the User Extensions form is checked.

Employee
Scan your employee ID number.

4 Select **Submit**.

Clocking Out for Lunch

Use the Lunch In/Out transaction to clock out for lunch.

You must have the Time Track module implemented to use the Lunch In/Out transaction. If you do not have the Time Track module implemented, use the Start/Stop Shift transaction to clock out for a lunch.

See Starting Shifts and Stopping Shifts for instructions on using the Start/Stop Shift transaction.

To clock out for lunch:

1 On the Main Menu, tap **TT Trans**.
2 Tap **LunchIn/Out**.
3 Specify this information:

Date
Verify that the correct date is displayed. Edit if necessary. You can only edit the date if you are authorized to do so on the User Extensions form.

Time
Verify that the correct time is displayed. Edit if necessary. You can only edit the date if you are authorized to do so on the User Extensions form.

Employee
Scan your employee ID number.

4 Select **Submit**.

Using the Time Attendance Transaction

Use the Time Attendance transaction to perform these activities:

- clock in at the beginning of the day
- clock out at the end of the day
- clock out for a break
- clock in from a break
- clock out for lunch
- clock in from a lunch

You must have the Time Track module implemented to use the Time Attendance transaction. If you do not have the Time Track module implemented, use the Start/Stop Shift transaction to clock in and out.

See Starting Shifts and Stopping Shifts for instructions on using the Start/Stop Shift transaction.

To use the time and attendance transaction:

1. On the Main Menu, tap **TT Trans**.
2. Tap **Time Attendance**. The Time Attendance screen is displayed.
3. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
4. In the **Employee** field, scan your employee ID number or team number.
5. In the **Trans Type** field, select the type of activity you are performing.
6. Select **Submit**.

Starting Jobs

You can use the Job Booking transaction to start jobs for employees and machines. The time the employee spends working on the job is recorded and attributed to the job in your ERP system. You can start these job types:

- Assembly
- Indirect
- PCS Project
- Project
- Service
- Work/Depot

You must have the Time Track module implemented to use the Time Track Job Booking transaction. If you do not have the Time Track module implemented, use the Warehouse Mobility Job Booking transaction to start jobs. See Starting Jobs Using Warehouse Mobility for instructions on using the Warehouse Mobility Job Booking transaction.

See "Starting Production Orders and Setup Activities" on page 41.

See "Starting Indirect Tasks" on page 40.

See "Starting Machine Jobs" on page 41.

See "Starting Projects" on page 42.

See "Starting Service Orders" on page 42.

Starting Indirect Tasks

You can only start indirect tasks if the **Allow Indirect Job** parameter is selected for the Job Booking transaction.

1. On the Main Menu, tap **TT Trans**.
2. Tap **Job Booking**. The Job Booking screen is displayed.
3. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
4. In the **Employee** field, scan your employee ID number or team number.

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed.
5. In the **Type** field, select **Indirect**.
6. In the **Task** field, select a task code.
7. Select **Submit**.

Starting Machine Jobs

1. On the Main Menu, tap **Make It**.
2. Tap **Job Booking**. The Job Booking screen is displayed.
3. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed.
4. Select **Machine Time Mode**.
5. Specify or review this information:

   Order Number
   Scan an order number.

   Operation
   Select an operation number.
6. Select **Process**.

Starting Production Orders and Setup Activities

The warehouse mobility icon based menu and list based menu comprises of the TT Trans. Job Booking is listed as a transaction under the TT Trans.

On the TT Trans module:

1. Select **Job Booking**. The Job Booking screen is displayed.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. In the **Employee** field, scan your employee ID number or team number.

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed.
4. In the **Order Type** field, select **Assembly** or **Work/Depot**.
5. Specify or review this information:

   Order Number
   Scan an order number.

   Operation
   Select an operation number.

   Setup?
   Specify whether this job refers to a setup process.

Machine
If applicable, the machine used for the operation is displayed.

Machine Ratio
If applicable, specify a machine ratio. You can only specify a machine ratio if the **Combine Labor and Machine Time** parameter is selected for your employee type. The machine ratio determines what portion of the reported labor time will be reported for the machine. For example, a ratio of **.5** will report half the reported labor time for the machine.

Work Center
The work center is displayed.

6. Select **Submit**. The order or setup activity is started or added to your workset.
7. Optionally, if you are a workset-enabled employee, select **Start Workset** to start all jobs on your workset. If your workset is already running, any jobs that you add to it are automatically started.

Starting Projects

1. On the Main Menu, tap **TT Trans**.
2. Tap **Job Booking**. The Job Booking screen is displayed.
3. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
4. In the **Employee** field, scan your employee ID number or team number.

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed.
5. In the **Type** field, select **PCS Project** or **Project**.
6. Specify this information:

   Project
   Scan a project number.

   Task
   Scan a task number.

   Cost Code
   Select a cost code.
7. Select **Process**.

Starting Service Orders

1. On the Main Menu, tap **Make It**.
2. Tap **Labor Reporting**. The Labor Reporting screen is displayed.

3 Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.

If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed.

4 In the **Employee** field, scan your employee ID number or team number.

5 In the **Type** field, select **Service**.

6 Specify this information:

PartnerID
Specify a partner ID number.

Order
Scan an order number.

Line
Select a line number.

Operation
Select an operation number.

Work Code
Select a work code.

Bill Code
Select a bill code.

7 Select **Process**.

Stopping Jobs

You can use the Job Booking transaction to stop jobs for employees and machines. The time the employee spends working on the job is recorded and attributed to the job in your ERP system. You can stop these job types:

- Assembly
- Indirect
- PCS Project
- Project
- Service
- Work/Depot

You must have the Time Track module implemented to use the Job Booking transaction. If you do not have the Time Track module implemented, use the Warehouse Mobility Job Booking transaction to stop jobs.

See Stopping Jobs Using Warehouse Mobility for instructions on using the Warehouse Mobility Job Booking transaction.

See "Stopping Production Orders" on page 45.

See "Stopping Setup Activities".

See "Stopping Indirect Tasks" on page 44.

See "Stopping Machine Jobs" on page 44.

See "Stopping Projects" on page 47.

See "Stopping Service Orders" on page 47.

Stopping Indirect Tasks

1. On the Main Menu, tap **TT Trans**.
2. Tap **Job Booking**. The Job Booking screen is displayed.
3. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
4. In the **Employee** field, scan your employee ID number or team number. This information is displayed:
   - shift
   - job type
   - task code

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed. Optionally, select **Stop Workset** to stop all jobs on your workset.
5. Select **Stop**.

Stopping Machine Jobs

1. On the Main Menu, tap **TT Trans**.
2. Tap **Job Booking**. The Job Booking screen is displayed.
3. Select **Machine Time Mode**.
4. Scan an order number. This information is displayed:
   - order type
   - order number
   - operation
   - task code
   - required quantity

If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed. Optionally, select **Stop Workset** to stop all jobs on your workset.

5 Specify this information:

Qty Completed
Specify the number of completed items for the selected operation.

Qty Rejected
Specify the quantity to scrap.

Reason Code
Select a reason for the scrapped items. This field is only displayed if you are scrapping items.

Lot
If applicable, scan a lot number.

Complete
If applicable, select this check box to complete the current operation. No additional quantities can be completed or rejected for an operation once it is completed.

6 Select **Submit**.

Stopping Production Orders

The warehouse mobility icon based menu and list based menu comprises of the TT Trans. Job Booking is listed as a transaction under the TT Trans.

On the TT Trans module:

1. Select **Job Booking**. The Job Booking screen is displayed.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. In the **Employee** field, scan your employee ID number or team number. This information is displayed:
   - order type
   - order number
   - operation
   - required quantity

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed. Optionally, select **Stop Workset** to stop all jobs on your workset.
4. Specify this information:

   Qty Completed
   Specify the number of completed items for the selected operation.

Qty Rejected
Specify the quantity to scrap.

Reason Code
Select a reason for the scrapped items. This field is only displayed if you are scrapping items.

Lot
If applicable, scan a lot number.

Machine Ratio
If applicable, specify a machine ratio. You can only specify a machine ratio if the **Combine Labor and Machine Time** parameter is selected for your employee type. The machine ratio determines what portion of the reported labor time will be reported for the machine. For example, a ratio of **.5** will report half the reported labor time for the machine.

Complete
If applicable, select this check box to complete the current operation. No additional quantities can be completed or rejected for an operation once it is completed.

5. Select **Submit**.

   If the item is serial-controlled, you are prompted to scan serial numbers for the items. In the **Serial** field, scan or select a serial number for each item. The total quantity of serial numbers to scan is displayed. The **Scanned** field shows how many serial numbers you have scanned. When you have scanned the required quantity of serial numbers, click **Process**. Optionally, select **Show List** to view a list of available serial numbers, or select **Clear List** to clear all scanned serial numbers.

   If the transaction is configured to automatically print labels, the labels are printed.

6. If the transaction is configured to manually print labels, you are asked if you want to print labels. Select **Yes** and specify this information:

   Printer
   Select a printer.

   Label Per Box
   Specify the number of labels to print for each box.

   Qty Remaining
   The number of remaining labels to be printed is displayed.

   No of Boxes
   Specify the number of boxes for which to print labels.

   Qty Per Box
   Specify how many items are in each box.

7. When the quantity of remaining labels to print is zero, select **Process** to print the labels. Optionally, select **Clear Labels** to clear the **No of Boxes** and **Qty Per Box** fields.

Stopping Projects

The warehouse mobility icon based menu and list based menu comprises of the TT Trans. Labor Reporting is listed as a transaction under the TT Trans.

On the TT Trans module:

1. Select **Job Booking**. The Job Booking screen is displayed.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. In the **Employee** field, scan your employee ID number or team number. This information is displayed:
   - shift
   - job type
   - project number
   - task number
   - cost code

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed. Optionally, select **Stop Workset** to stop all jobs on your workset.
4. Select **Stop**.

Stopping Service Orders

The warehouse mobility icon based menu and list based menu comprises of the TT Trans. Job Booking is listed as a transaction under the TT Trans.

On the TT Trans module:

1. Select **Job Booking**. The Job Booking screen is displayed.
2. Optionally, specify a date and time to record for this transaction. The current date and time is specified by default. You can only modify the date and time if your user ID has the appropriate authorizations on the User Extensions form.
3. In the **Employee** field, scan your employee ID number or team number. This information is displayed:
   - order number
   - order line
   - operation number

   If you are a workset-enabled employee, the **Running/Queue** shows how many jobs you currently have running or queued in your workset. If you have only one job running, the job number or code is displayed. Optionally, select **Stop Workset** to stop all jobs on your workset.
4. Specify or review this information:

WCode
The work code is displayed. You can modify this value if necessary.

BCode
The bill code is displayed. You can modify this value if necessary.

5. Select **Stop**.

Printing Job Booking Reports for Employees

Use the Report Job Bookings by Employee form to print job booking reports for employees.

1. Open the Report Job Bookings by Employee form.
2. To define which records to include in the report, define filter criteria. Optionally, leave the filter criteria blank to include all records. To define filter criteria, specify starting and ending values for these fields:

Report Date
Specify the record dates.

Employee
Specify the employee numbers associated with the records.

Employee Type
Specify the employee types associated with the records.

Work Group
Specify the work groups associated with the records.

Department
Specify the departments associated with the records

Shift
Specify the shifts associated with the records.

Order Type
Specify the order type associated with the records.

Order
Specify the order numbers associated with the records.

Task Code
Specify the task codes associated with the records.

Absence
Select this check box to include absence records.

Gap
Select this check box to include gap records.

Break
Select this check box to include break records.

Display Header
Select this check box to include a report header.

3. Optionally, to preview the report, click **Preview**.
4. To print the report, click **Print**.

Teams

6

Use the Teams form to create teams, deactivate teams, view the team members, add team members, remove team members. Teams are created to organize the employee labor activities. Using the Teams form, jobs can be started or stopped for all the team members in a single transaction.

Creating Teams

Use the Teams form to organize the employee labor activities craete the teams and ass employees to the same team. Using teams jobs may be started or stopped for all the team members in a single transaction.

See to create teams using the Shop Floor module in the Factory Track application.

If the Shop Floor and Time Track modules are implemented, you must use the Team Maintenance form in the Shop Floor module to create teams.

Note: Teams created using the Time Track module are not compatible with the Shop Floor module.

To create the team using Teams form

1 Select **Form > Open > Teams**

2 Specify this information:

Team
The team number.

Description
The description of the team.

Badge ID
The badge ID of the team.

Active
If this check box is selected, the team can start and stop the jobs and employees can join or leave the team.

Workset Enabled
If this check box is selected, the team can work on worksets and multiple jobs.

Labor Proration
The method used to distribute the time of the Team. Labor proration is calculated for each employee. The labor is allocated by the workset configuration defined in the Employee type form.

Note: This field is displayed only if you have select the **Workset Enabled** check box.

Machine Proration
The method used to distribute the time of the Team. Machine proration is applied to the first employee on the team members list.

Note: This field is displayed only if you have select the **Workset Enabled** check box.

Remove Member At Clock Out
If this check box is selected, employees are removed from the team when they clock out.

Combine Labor and Machine Time
If this check box is selected, machine time is reported automatically as a ratio of the labor time. The machine time is applied to the first employee on the team members list.

Stop Only Transaction
If this check box is selected the jobs are stopped. When a job is stopped, a job start transaction is automatically generated. Example: If you clock in at 8:00 and stop job ABC at 9:00, a start job transaction for job ABC is generated at 8:00. Then, if you stop job XYZ at 11:00, a start job transaction for job XYZ is generated at 9:00. Clocking out automatically stops the current job.

3 Click **Save**.

Deactivating Teams

When using Time Track, use the Teams form to deactivate teams that you are no longer using. Deactivated teams cannot start or stop jobs or add or remove members. You cannot delete teams in Factory Track.

To deactivate teams using the Shop Floor module in Infor Factory Track, see Deactivating Teams Using Shop Floor.

1. Open the Teams form.
2. Select a team from the grid at the left. The team details are displayed.
3. Clear the **Active** check box.
4. Click **Save**. The selected team is deactivated.

Viewing Team Details

1. Open the Teams form.

2 Select a team from the grid. This information is displayed for each team member:

- Employee ID
- Name
- Clock in status
- Badge ID
- Date added to the team
- Work group
- Department

3 If the team is currently working on a job, this additional information is displayed:

Note: If the team is configured to use worksets, select a job to view in the **Order Type** field.

- Order type
- Order number
- Item number
- Task code
- Work center
- Machine
- Suffix
- Operation

Adding Team Members

1 Open the Teams form.
2 Select a team from the grid at the left. The team details are displayed.
3 In the Members section, select an empty line in the grid, or click the **Create New Object** button in the toolbar.
4 In the Employee field, specify the employee number.
5 Click **Save**. The specified employee is added to the team.

Removing Team Members

1 Open the Teams form.
2 Select a team from the grid at the left. The team details are displayed.
3 In the Members section, select an employee from the grid.
4 Click the **Delete** button in the toolbar.

5 Click **Save**. The selected employee is removed from the team.

Absence management

7

Absence management organises the process of leave request. Absences form is used by the employee to request the leave. Employees can request for the leave with the relevant absence codes.

After the employee has requested for the leave, supervisor can accept or reject the leave requests. Supervisor can also modify the status of the rejected leave request.

Creating Absence Codes

Use the Absences form to create the absence codes.

To create the absence code:

1 Select **Form > Open > Absences**
2 Specify an absence code and the description.
3 Specify this information in the General section:

Active
If this check box is selected the employees can select the absence code is displayed.

Absence Type
The absence type that matches the purpose of the absence Possible values are:

- **Holiday**: Used to report the holiday.
- **Vacation**: Used as the substituted absence code for Holiday. It can be used for non-holiday report dates.
- **Generic**: Used to report the non-holiday dates.
- **Sick**: Used to report the dates when the employee is sick.
- **Incident**: Used to report only the non-holiday dates. It has a point value assigned to it that is used by the Attendance Points System.
- **NoCallNoShow**: Used to report only the non-holiday dates. It has a point value assigned to it that is used by the Attendance Points System. This is used when the employee does not inform before taking a leave.

Paid Absence
If this check box is selected the employee are paid for the leave request.

Overtime Eligible
If this check box is selected the absence hours count toward the overtime threshold.

Premium Method
The premium method for the absence type. Specify **Not Allowed** to apply no premium to absence hours, **Shift Premium** to apply the premium that is specified for the selected shift, or **Premium Code** to apply the premium specified in the Premium Code list.

Premium Code
The premium code for the absence type. If this check box is selected, the premium absence hours are allowed for this absence code. This list contains all premiums defined on the Premiums Codes form.

Approval Required
If this check box is selected the approval is required is required for any absence code.

4. Specify this information in the Advanced section:

   ERP Task Code
   The task code of the ERP. If the value is not specified in the ERP Task Code field, absence hours are posted to ERP.

   Payroll Code
   The code of the payroll. The default value is the same as the **Absence Code** value. The **Payroll Code** value will be associated with these absence hours in the payroll extract. Specify a value in the **Payroll Code** field if these absence hours should be associated with a different code in the payroll extract.

5. Specify this information in the Tracking section:

   Tracked
   If this check box is selected transaction records, accrual rates and limits can be tracked.

   Carry Forward
   If this check box is selected the remaining hours of leaves are transferred to the next year. This field is displayed only if the **Tracked** check box is selected.

   Carry Forward Absence Code
   If this check box is selected the absence code can be used for the hours of leaves transferred to the next year. This field is displayed only if the **Allow Carry Forward** check box is selected.

6. Click **Select Color** to specify a color format for displaying absence hours in the Calendar form.
7. Specify a foreground (text) color and a background color and view the result in the **Sample** field. The Point System section is used by the Attendance Points System to assign incident values to absence codes.

   Note: This section is displayed only if the value in the **Absence Type** field is **Incident** or **NoCallNoShow**.

8. Specify this information in the Point section:

Incident Value
When a full incident is incurred, the value entered here is the amount the employee's Total Incident Balance is incremented by.

Partial Incident Value
When a partial incident is incurred, the value entered here is the amount the employee's Total Incident Balance is incremented by.

Partial Incident Duration
This parameter set the duration limit of a partial incident. Absence hours less than this parameter applies partial incident values and Absence hours greater than this parameter applies full incident values.

Continuous Request
If this check box is selected, and an Incident ABS Type is requested through the Absence Request System, then the entire request is counted as one incident. Consequently, only one Incident Table Record is created for the duration of the request. If this check box is cleared each report date in the request is considered as a separate incident. Consequently, an Incident Table Record is created for each report date.

Note:

- The Continuous Request parameter is not applied when Absence hours for an Incident or NCNS ABS Type is created on the Hours Summary form or the Hours Detail form. Each report date generates a separate incident. Similarly, Absence hours for Incident or NCNS ABS Types are created using the Planned Absence form linked to the Hours Summary form and treat each report date as a separate incident.
- The Continuous Request parameter is applied to the absence hours for Incident or NCNS ABS Types created on the Hours Detail form using the Planned Absence form or on the Planned Absence form in the stand-alone mode.

9 Click **Save and Exit**.

Modifying Absence Codes

To modify existing absence codes, use the Absences form.

To modify an absence code:

1 Open the Absences form.

2 Select the absence code from the grid at the left.

3 Edit the appropriate fields.

4 Click **Save**.

Printing Absence Reports

Use the Absence Report form to print customized reports of employee absences.

1 Open the Absence Report form.

2 To define which absences to include in the report, define filter criteria. Optionally, leave the filter criteria blank to include all absences. To define filter criteria, specify starting and ending values for these fields:

Report Date
Specify dates for the absences.

Employee
Specify the employee numbers associated with the absences.

Employee Type
Specify the employee types associated with the absences.

Work Group
Specify the work groups associated with the absences.

Department
Specify the departments associated with the absences.

Shift
Specify the shifts associated with the absences.

Absence Code
Specify absence codes.

3 Optionally, to preview the report, click **Preview**.

4 To print the report, click **Print**.

Viewing Absence Details

To view absence details for an employee:

1 Open the Employee Absence Tracking form.

2 Specify your employee number and the tracking year. Optionally, select **Include Accruals** to display accrual transaction history. This information is displayed in the top grid for each absence code:

Time Off Group Id
Displays the time off group for the selected tracking year.

Absence Code
The absence code is displayed.

Absence Tracking Method
Select **Deduction** or **Accrual**.

Note: The new location of **absence tracking method** field allows groups with absence codes to have multiple tracking methods.

Hours Taken
The number of hours taken during the specified tracking year.

Accrued Hours
Total number of hours accrued during the specified tracking year.

Available Hours
The number of hours available to take are displayed.

Annual Hours Allowed
The number of hours that can be accrued in a year is displayed.

Current Hours
The number of hours taken during the current period.

Planned Hours
The number of hours that have been approved.

Carried Forward
The number of hours that can be carried into the next year is displayed.

Hours Requested
The number of requested hours that have not yet been approved.

Accrual Value
This field is only displayed if the tracking method is **Accrual**. The number of hours accrued after each increment is displayed.

Increment Type
This field is only displayed if the tracking method is **Accrual**. The frequency at which hours are accrued is displayed.

3 This information is displayed in the bottom grid for each absence code:

Report Date
Displays the report date. If the report date occurs on a date that a tracking year does not exist, the Supervisor or Administrator receive a soft prompt when they attempt to authorize an X or process hours for the report date the incident occurred on. The `No Tracking Year Defined for the Attendance Point System` message is displayed.

Tracking Year
Displays the tracking year. The tracking year measurement period compares the incident report date with the records in the emp_time_off_group_change table.

Absence Code
Displays the absence code that is used for tracking.

Hours Taken
The number of hours taken during the specified tracking year.

Incident Type
Displays the type of incident. The values for the field are: **Exception Incident Full**, **Exception Incident Partial**, **ABS Incident Full**, **ABS Incident Partial**, **NoCallNoShow**.

Track
Displays the multiple disciplinary tracks that can be configured for specific types of incidents. When more than one track has been defined this field will display the level of the default track.

Incident Value
ABS Code Configuration form helps to define the incident value of ABS Code. An **Attendance Points System** tab and an **Attendance Threshold** tab is added to the Employee Type form to configure incident values for attendance exceptions.

Corrective Action
Displays the future action for the incident.

Approver
The administrator or supervisor who approves the incident type.

Disposition Date/ Time
The date and time when the incident rearranged or update.

Processed By
The login details of the person who processes the hours approve for the incident.

Processed Date/Time
The date and time when the incident is processed.

Status
The status of the incident. The values are: **Open**, **Complete** or **Forgiven**

4 Click **Save**.

Creating planned absences

Use the Planned Absences transaction form to apply for the leave or leaves.

To create the planned leave:

1 Select **Form > Open > Planned Absences**. You can also access the Planned Absences form from the Hours Summary form or Hours Detail form.
2 Specify the **Employee** number.
3 Specify an **Absence** code.
4 Select the value in the Absence field. Possible values are:
   - Partial
   - Full Day
5 Specify the range of dates.
6 Specify the range of times for the leave, if the value in the Absence field is set to Partial.
7 Click **Submit**. The planned leave is displayed on the Hours Summary form and Hours Detail form.

Creating multiple planned absences at a time

Use the Planned Absences transaction form to apply for the multiple leaves.

To create multiple planned leaves:

1. Select **Form > Open > Planned Absences**. You can also access the Hours Summary form or Hours Detail form and click Planned Absences.
2. Use selection criteria to display the records that are to have leave created for the employee.
3. Specify an **Absence** code.
4. Select the value in the Absence field. Possible values are:
   - Partial
   - Full Day
5. Specify the range of times for the absence, if the **Absence** filed is set to **Partial**. The time must be specified in the HHMM format.

   Note: The **Employee** field and **Date** field are not displayed.
6. Click **Submit**. Planned leaves are created for the employees and leave report dates are selected on the Hours Summary form.
7. Specify this information:

   Note:

   - A confirmation message is displayed that confirms the number of leaves.
   - The leave records are not displayed, if the **Approved** check box is not selected.

Requesting Time Off

1. Open the Employee Time Off Request form.
2. Click **Create New Object** in the toolbar.
3. Specify this information:

   Employee
   Specify your employee number. Your work group, if applicable, and available absence hours are displayed.

   Request Date
   Specify the date of the request. The current date is specified by default.

   Seq
   Specify the sequence.

   Absence Code
   Specify the absence code.

Start Date
Specify the start date for the time you are requesting off.

End Date
Specify the end date for the time you are requesting off.

Duration
Select **Full Day** or **Partial**.

Status
The value **Requested** is automatically specified in this field.

Start Time
This field is only available if **Partial Day** is selected in the **Duration** field. Specify the start time you are requesting off.

End Time
This field is only available if **Partial Day** is selected in the **Duration** field. Specify the end time you are requesting off.

Tracking Year
Select the tracking year.

4. Optionally, specify a comment in the **Employee Comment** field.
5. Click **Save**.

Viewing Time Off Requests

1. Open the Employee Time Off Requests form. If you are a supervisor, your time off requests are displayed as well as those of employees for whom you are authorized to approve time off requests. If you are a user, only your time off requests are displayed.
2. Select a request from the grid. The request details are displayed on the form.

Absence Tracking

Use the forms such as the Time Off Group Parameters, the Create New Tracking Year and Compute Time Off Accruals to track the leaves requested by the employees.

Configuring Time Off Groups

To create the time off groups:

1. Select **Form > Open > Time Off Group Parameters**
2. Specify this information:

Time Off Group ID
The name of the time off group.

Description
The description of the **Time Off Group ID**.

3 Click **Add Record** to update absence codes for the time off group. Specify or review this information:

Absence Code
The absence code.

Annual Hours Allowed
The number of hours of leaves that can be accrued in a year.

Absence Tracking Method
The method to track the absence report created by the employee. Possible values are:

- **Deduction**: The entire Annual Allowed leave balances are available at the beginning of the tracking year.
- **Accrual**: The available leave balances as the tracking year proceeds.

Note: Time Off Groups can now be configured with ABS Codes, that uses the deduction and accrual tracking method.

Validation Type
The validation type to confirm the if the absence report is created. Possible values are:

- Warning: Warning generates a soft prompt but allows the absences when available hours are 0.
- Error: Error generates a hard stop and does not allow absences when available hours are 0.

Allow Carry Forward
Indicates whether the remaining hours of leaves can be transferred to the next year. This is a display field.

Maximum Carry Forward
The maximum number of hours that can be transferred to the next year is displayed.

Increment Type
The frequency at which hours are accrued is displayed. This field is only displayed if Accrual is specified as the absence tracking method.

Accrual Value
The number of hours accrued after each increment.

4 Click **Save**.

Creating a tracking year

Create a tracking year to track the leave records and to transfer unused leave hours to the next year.

To create the tracking year:

1 Select **Form > Open > Create New Tracking Year**.
2 Specify this information:

Tracking Year
The tracking year that is to be created.

Year Start Date
The start date of the new tracking year.

Carry Forward Option
The option to transfer the leaves to the next year. Possible values are:

- **Omit Carry Forward**: A new tracking year is created but hours are not transferred.
- **Carry Forward Only**: Hours are transferred but the tracking year is not created.
- **Include Carry Forward**: A tracking year is created and hours are transferred.
- **Attendance Tracking Only**: Only used when the **Absence Tracking** check box is cleared and the **Attendance Tracking** check box is selected in the Time Off Group Parameters form. When used, a tracking year record with the value set to **0** is created in the **Time Off Group** field on the Employee Record.

Employee
The range of employees for which the tracking year is created.

Note: If the tracking year is created for all the employees, no value is specified in this field.

Work Group
The range of work groups for which the tracking year is created.

Note: If the tracking year is created for all the work groups, no value is specified in this field.

Emp Type
The range of employee types for which the tracking year is created.

Note: If the tracking year is created for all the employee types, no value is specified in this field.

Shift
The range of shifts for which the tracking year is created.

Note: If the tracking year is created for all the shifts, no value is specified in this field.

Department
The range of departments for which the tracking year is created.

Note: If the tracking year is created for all the departments, no value is specified in this field.

3 Click **Process**. The new absence tracking year is created, hours are carried forward, or both, depending upon the selected **Carry Forward Option**.

Note:

- For employees who have a time off group in the previous year, the employee record is updated with the values defaulted from the previous year time off group.
- For new employee records or employees that do not have a tracking year in the previous year:

- Create a new tracking year record with the time off group designation and the effective date which is same as the start date of the current tracking year.
- Save the employee record, execute the Create New Tracking Year transaction to create available leave balances for the employee.

Calculating Time Off Accruals

To allocate time off to employees in time off groups that use the **Accrual** absence tracking method, you must calculate time off accruals. You can calculate time off accruals manually using the Compute Time Off Accruals form, or you can use the Background Queue form to set up time off accrual computations to be performed automatically at regular intervals.

To calculate time off accruals:

1 Select **Form > Open > Compute Time Off Accruals**

2 Specify this information:

Process Through
Tthe date within which the time off accruals are calculated. Time off accruals are calculated for all dates from the tracking year start date, through the current date.

Increment Date
If this check box is selected the date specified in the **Process Through** field is increased. If this check box is cleared, the date specified in the Process Through field is used as continual time.

Note: This parameter is only used when the Complete Time Off Accrualsform is run automatically to calculate the accruals

Recompute Accruals
If this check box is selected the existing accruals are calculated again. If this check box is cleared, the new calculations are added to the existing accruals. This is used when accrual rate changes in the middle of a tracking year.

Facility
The range of facilities for which the accruals are calculated.

Note: If the accruals are calculated for all the facility, no value is specified in this field.

Employee
The range of employees for which the accruals are calculated.

Note: If the accruals are calculated for all the facility, no value is specified in this field.

Time Off Group Id
The range of Time Off Group IDs for calculating the accruals.

Note: If the accruals are calculated for all the facility, no value is specified in this field.

3 Click **Process**. Accrued time off is allocated for all specified employees using the **Accrual** absence tracking methods specified for the employee’s Time Off Group.

Review tracked leave balances and history

Leave balances and activity may be viewed on the Employee Absence Tracking form. The form may be used by an employee to view their own absence activity or it may be used by supervisors that have Work Group privileges to approve absence requests. The form is comprised of a header section, an available balances array and a history log.

Specify the information in the header section:

Date
The date the query is executed.

Name
The employee whose absence balances you want to review.

Tracking Year
The current year or the year when the leave request is created. The value is defaulted, but can be modified to view absence activity in other years.

Review the information in the header section:

Perfect Attendance
When Attendance Tracking is displayed, the attendance status and total points of the employee are displayed.

Department
The department of the employee.

Current Period
The start date of the current pay period.

Time off Group ID
The time off group of the employee.

History Filter
The Attendance Incidents and Absence histories. Incidents Only displays attendance incidents only. Absences Only displays absence activity only.

Show Accruals
The accrual transactions with absences activity. Clear the field to omit the display of accrual transactions.

Note: The Available Balances Array displays all available, requested, planned and taken leave balances. The balances for each Absence Code in the Employee Time Off Group form are displayed.

Specify the information in these fields:

Tracking Method
The tracking method to confirm if the Absence code uses the deduction method or accrual method. Deduction makes the entire Annual Allowed balance available on the first day of the tracking year and

then usage is deducted from that balance. The Accrued method begins the tracking year with zero available then accrues available as the year passes.

Annual Allowed
The annual leave hours permitted for the employee.

Accrued Hours
The value 0 is displayed in this field for Absence codes using the deduction method. For Absence codes using the accrual method the amount of hours that have accrued to date are displayed in this field.

Hours Requested
The number of hours requested for the leave. Requested hours do not reduce available balances. Once the absence request is approved the value in this field is updated to 0 and the hours are not displayed.

Note: This field is displayed, if the value is specified in the **Absence Request System** field.

Available Hours
For Deduction Method Absence codes this is Annual Allowed less Planned, Current and Taken hours. For Accrual Method Absence codes this is Accrued hours less Planned, Current and Taken hours.

Hours Taken
The hours of leaves that are accepted.

Current Hours
The leaves scheduled for the current pay period. This includes accepted hours and not accepted hours of the leaves. Leaves from previous pay periods that are not accepted are also displayed.

Carried Forward
The remaining leave balances that are transferred to the next pay period. After all the leaves are applied in the tracking year, any remaining available balances can be transferred to the next year.

Increment Type
The type of increment based on the Absence Code.

Note:

- If the value in the Absence Code field is Deduction, then this field is not modified.
- If the value in the Absence Code field is Accrual, then the increment duration is displayed in this field.

Accrual Value
This field set to 0 for deduction method absence codes. The period that corresponds to the accrual type are divided into the leaves allowed annually to determine the number of hours accrued every incremental period for accrual method absence codes.

Example: The formula to determine the increment value, 120/12 = 10 hrs/mo.

When Accrual Type value for the Monthly Allowed and the Annual Allowed leaves are 120 hours

Annual Allowed Overrides

In case of an exception for an employee in a time off group, the annual allowed leaves for the employee can be overridden to accommodate the exception. In the deduction method, available balances are based on the overridden Annual Allowed values. For accrual method hours increment values are based on the Overriden Annual Allowed values.

Overriding the Annual Allowed

To update the annual allowed leaves:

1. Select **Form > Open > Employees**.
2. Select the employee for whom the values are to be updated.
3. Select the Absences tab.
4. Select the tracking year to update.

   Note:

   - The Absence Code Array field is modified to display balances for the selected year.
   - A tracking year must exist to override an Annual Allowed.

5. Specify the Annual Allowed value in the Hours Override field of the absence code and exit the form.

   Note:

   - The updated value can increase or decrease the Annual Allowed leaves.
   - The value must be specified in HHHMM format.
   - The value is also displayed in the **Annual Allowed Override History** field.
   - The updated values are displayed in the **Absence Code Overridden** field.

6. Review a value displayed in the Annual Allowed Override History form.

   Note: The tracking year the override is effective in, the net change of the override, the adjusted Annual Allowed, the user name of the person executing the override and the Month and Date of the change can also be viewed on this form.

7. Click **Save**.

Absence Request System

The Absence Request System regulates employee leave requests and the approval from the supervisor. This is a separate feature from Absence Tracking. You can use the Absence Request System without tracking leaves and vice versa.

Requesting Time Off Using the Employee Time Off Request Form

To request time off using the Employee Time Off Request form:

1. Select **Form > Open > Employee Timee Off Request**
2. Click **Create New Object**.
3. Specify this information:

Employee
The employee number. Specify the work group, if applicable, and the available absence hours are displayed.

Note:

- If the form is accessed in the Linked mode, the value in this field is defaulted from the linked form.
- If the form is accessed by an employee, the respective Employee number is defaulted.

Request Date
The date of the leave request. The current date is specified by default. Supervisors can specify an alternate request date, if required.

Seq
When multiple requests are made by an employee for the same date, the requests are in sequence starting from 1.

Absence Code
The absence code.

Start Date
The start date for the time you are requesting a leave.

End Date
The end date for the time you are requesting a leave.

Duration
The duration of the leave. Select Full Day or Partial.

Status
The status of the leave request.

Note:

- If the Supervisor is updating the leave request for the employee, the status is set to **Approved**. The request can be accepted or denied by the supervisor.
- If the employee is updating the leave request, the status is set to **Requested**.
- If the leave request is approved, only supervisor can modify the status of the leave request.

Start Time
The start time of the leave. This field is only displayed if the **Partial Day** is selected in the **Duration** field.

End Time
The end time of the leave. This field is only available if Partial Day is selected in the Duration field.

Tracking Year
The tracking year in which the leave is requested. This value is defaulted as the current year. You can modify the value, if the leave requested is for the previous year or the next year.

4 Specify a comment in the **Employee Comment** field.

Note:

- The **Employee Comment** field is displayed for the respective employee.
- The **Supervisor Comment** field is displayed for the supervisor or the administrator.

5 Click **Save**.

Requesting Time Off Using the Employee Home Page Form

1 On the Employee Home Page form, select **Request Time Off**.

2 Specify your employee number and the tracking year. This information is displayed for each absence code:

- Annual hours allowed
- Accrued hours
- Hours requested
- Hours taken
- Available hours
- Current hours
- Planned hours
- Accrual value
- Increment type
- Specify the duration: **Full Day** or **Partial Day**.

3 Specify this information:

Absence Code
Specify the absence code.

Start Date
Specify the start date for the time you are requesting off.

End Date
Specify the end date for the time you are requesting off.

Start Time
This field is only available if **Partial Day** is selected in the **Duration** field. Specify the start time you are requesting off.

End Time
This field is only available if **Partial Day** is selected in the **Duration** field. Specify the end time you are requesting off.

4 Optionally, specify a comment in the **Employee Comment** field.
5 Select **Submit**.

Approving and Denying Time Off Requests

Time off requests must be approved before an absence detail record will be generated for them. To approve or deny time off requests for employees in your work group, you must be authorized to do so on the **Privileges** tab of the Work Groups form.

To approve or deny a time off request:

1. Open the Supervisor Time Off Disposition form. Employees who have pending time off requests are listed. This information is displayed for each employee:
   - Work group
   - Employee number
   - Name
   - Number of time off requests
   - Number of approved time off requests for days that are on or after the current date
   - Number of denied time off requests for days that are on or after the current date

   Optionally, select **Show All Employees** to list all employees for whom you are authorized to approve time off rather than only employees who have a pending request.
2. Optionally, select an employee to view the time off requests of that employee. Details for the time off requests are displayed at the bottom of the form.
3. Select the **Select** check box for one or more employees.
4. Click **Approve Selected** or **Deny Selected**. All requests with the status of **Requested** are approved or denied for each selected employee.

   Alternatively, to approve or deny a single request, you can change the **Status** of the request to **Approved** or **Denied** in the grid at the bottom of the form.
5. Click **Save Changes**.

Using the Supervisor Time Off Disposition form

Use this form to execute multiple leave requests at a time or to process one at a time.

1. To approve or deny multiple time off requests:
   - Select **Form > Open > Supervisor Time Off Disposition**. Employees who have pending time off requests are displayed. Review this information for each employee:

    - Work Group
    - Employee number
    - Name
    - Number of time off requests
    - Number of approved time off requests for days that are on or after the current date.
    - Number of denied time off requests for days that are on or after the current date

- Select **Show All Employees** to display all employees for whom you are authorized to approve time off rather than only employees who have a pending request.
- Select the **Select** check box for one or more employees.
- Click **Approve Selected** or **Deny Selected**. All requests with the status of **Requested** are approved or denied for each selected employee.

  Note: The **Status** of the request is updated to **Approved** or **Denied**.

- Click **Save Changes**.

2 To approve or deny a single time off request:

- Select the leave request for the employee. The **Employee Comment** tab, the **Supervisor Comment** tab and the **Error** tab are displayed.

  Note:

    - If the application does not accept the leave request, the request is displayed on the **Error** tab. Review the error message to resolve the issue.
    - Employee must submit the leave request again, if the issue is not resolved.

- Update the **Status** field for the leave request.
- Click **Save Changes**.

The Calendar view

Select the Calendar tab to view an array that displays all the requests in the Work Group of the supervisor. This array can be used to confirm that the supervisor cannot approve multiple leaves. Using the Employee Time Off Request, Non-Touch Screen to update requests.

Select **Form > Open > Employees > Absences > Employee Time Off Request**

Note:

- You can also access this form from:
    - The link on the Employee Absences Trackingform.
    - The Hours Summary form.
    - The Elapsed Detail form.
- The **Employee** number is defaulted, if this form is accessed from a parent form.

Approving or denying time off requests

To approve or deny time off requests:

1. Select **Form > Open > Employee Time Off Request** non-touch screen form.
2. Specify the **Employee** number. The pending and previous time off requests are displayed. Review this information for each employee:
   - Employee Number
   - Work Group
   - Request Date
   - Record Sequence
   - Absence Code
   - Start Time
   - End Time
   - Duration

     Note: The Start Time field and End Time field are displayed, if the value in the Duration field is set to Partial.
   - Status
   - Tracking year of the request
   - Available hours for the requested absence code
   - Perfect Attendance Status, if applicable
   - Perfect Attendance Points, if applicable
   - Perfect Attendance Corrective Actions, if applicable
   - Employee Comment
   - Supervisor Comment
   - Error Tab, displayed only if the request status is set to Error.
3. Update the Status of the leave request. The supervisor can:
   - Approve or deny the leave requests.
   - Modify the status of the leave request.
   - Update the status of the denied leave request to Approved.
4. Specify a message in the **Supervisor Comment** field.
5. Click **Save**.

Setting Up Email Notifications for Absence Requests

You can configure Time Track to send email notifications for absence requests. When an employee submits an absence request, an email notification will be sent to any supervisors who have permission to approve or deny the request. When a request is approved or denied, an email notification is sent to the employee who submitted the request. To set up email notifications, you must configure supervisors and employees to receive them.

See "Configuring Supervisors to Receive Email Notifications" on page 74.

See "Configuring Employees to Receive Email Notifications" on page 74.

Configuring Supervisor to Receive Email Notifications

1. Use the Work Groups form to assign the supervisor to the work group of the employees for whom they will approve and deny absence requests. Ensure that the **Approve Absence Requests** check box is selected on this form for the supervisor. See "Configuring Work Groups" on page 110 for more information.
2. Use **E-mail Address** tab on the Users form to specify an email address for the user account of the supervisor.

Configuring Employees to Receive Email Notifications

Use **Contact Information** tab on the Employees form to specify an email address for the employee.

Approving and Processing Labor Records

8

All the labor records in a scheduled pay period must be approved and processed. If the labor records are configured to be processed through payroll, corresponding payroll detail records are generated when the labor records are approved and processed.

To approve and process labor records on the Hours Summary form and Detail form:

1. Select **Form > Open > Hours Summary** form.
2. Specify the selection criteria using these parameters to display labor records for approval and processing:
   - **Date Preference**: This field displays the date range for the selection such as **Show Today's Records**, **Show Yesterday's Records** and **Show Records for Yesterday and Today**.
   - **Report Date**: The starting and ending values are automatically specified based on the **Date Preference** selection. You can modify, or use the **Date Preference** to view the previous or subsequent reporting period.
   - **From - To Ranges**: The range of employees, employee types, work groups, departments, and/or shifts. Do not specify any value in this field to display all the available records.
   - **Filters**: This set of options allows you to include or exclude a record based on its status or type. Select the check box to include records with the relevant characteristic and clear the check box to exclude records with that characteristic.
3. Select the **Ready** filter to display only those records that are ready for approval and processing. Ensure that all the other filters are cleared for the records.

   Note: The labor record is ready to process, if the value is not updated in the **Status** field.
4. Click the **Status** option to confirm if the records are approved for processing. If the value is not specified in the **Approved By** field or **Processed By** field, the record is approved or processed.
5. Select the check box for each record which are to be approved and processed. Click the **Select All** option to select all the records.
6. Click **Approve and Process**.

Configuring the Time Track module

9

Time Track module in the Factory Track application comprises of four roles. The roles defined in the Time Track module are user, supervisor, administrator and generic.

To configure the Time Track module:

- Define the Time Track roles.
- Configure the site parameters.
- Configure department parameters.
- Configure employee types.
- Configure facility parameters.
- Configure holidays.
- Configure payroll schedules.

Time Track Roles

Time Track module in the Factory Track application comprises of four roles. The roles defined in the Time Track module are user, supervisor, administrator and generic.

Each role has its own access and privilege characteristic. User is the most restrictive, followed by TTHomepage, followed by Supervisor with Administrator being the least restrictive. The roles are designed to perform the following functions:

- User: This role is assigned to the employees. The primary function is to execute transactions. This role only collects hours. The hours cannot be modified or processed. The employee assigned to this role is not given access to forms using generic security and cannot be given control of the Work Groups.
- TTHomepage User: This user type is designed to allow multiple employees to access the attendance and the labor transactions without having to log in or log out of the transactions.
- Supervisor: This role is used by the supervisor to prepare employee hours for processing and to process the hours. Supervisors may execute transactions for themselves or for their employees, enter absences hours, edit hours for their employees and process hours to create payroll records. This role cannot save configuration forms or create new employee records.

- Administrator: This role used by the administrator to set up the application. Administrators have read, write and delete access on every form in the application. This role creates and modifies Shift records, Employee Type records, Employee records and all other configuration forms.

Configuring site parameters

To configure site parameters:

1 Select **Form > Open > Site Parameters**.

2 Review this information:

Site
The code of the site. This value This value and the site name specified in the Site form must be same.

Name
The site name. This value is defaulted from the Site form. This is a display field.

Description
The description of the site. This value is defaulted from the Site form. This is a display field.

ERP Type
The ERP used for integration. The value is defaulted form the Site form.

Configuring the parameters on the Calendar Setup tab

To configure parameters:

Start Date
The start date of the Site Calendar year.

Tracking Year
The year of the site **Start Date**.

1st Day of Work Week
The first day of the work week. The default value is Sunday.

Work Week Effective Date
The start date specified for the Site.

Note:

- If the company policy regarding the work week is updated, then the updated date must be specified in this field.
- This date must not be updated during the annual transition.

Generate Work Week
The Generate Work Week option creates the Start Date as the first day of the week for all the weekly queries and references.

Configuring the parameters on the Communication tab

The Time Track module integrated with each ERP have the Communication tab. The tabs are deactivated except the one that corresponds with the ERP Type. The tab is configured during the installation of the application. Use this tab to test communication between Time Track and the ERP. Select the Test Connection option.

Configuring the parameters on the Time Track tab

This tab contains site level parameters. Review these parameters on the Time Track tab:

Payroll Code
The code of the payroll. Payroll codes identify each record as originating from the ERP.

ERP Shift
The code of the ERP Shift. This code is specified for the Working Time Table (WTT). WTT is a generic calendar (24x7) which is specified in the ERP.

Allow Offset Posting

If this check box is selected, all the display fields are set to 0 automatically.

Example: A display field with the value of 4 hours is updated automatically to 0.

Allow Repost
If this check box is selected the edited transactions can be reposted in the ERP. If this check box is cleared an error message is displayed.

Use Global Posting
If this check box is selected, the records are not displayed if the transaction comprises of issues related to a specific employee number and report date combination. Example: An employee posts a group of four records in which the third record contains an error. Select this check box to block posting of all the four records. Clear this check box to post records 1, 2, and 4, and block only the third record.

Post Start and End Times To ERP
If this check box is selected, the start and end times are displayed in the ERP, regardless of the report date in the Time Track. The Time Track module modifies all hours to report dates. Example: When this check box is selected, a labor record in the Time Track module that starts on one day and ends on another is split during the posting process, so the time is displayed in the ERP on the date of posting. If this check box is cleared, the time is displayed in the ERP on the calendar date that corresponds to the Time Track report date.

Allow Revert Processed Payroll
If this check box is selected the Payroll Administrators can unlock the payroll, once the payroll is processed.

Allow Attendance Transactions on Future Dates
If this check box is selected the supervisors and administrators can review the transactions for future dates.

Configuring the Time Track tab

Use this tab to specify the color schema Site Holidays that is used in the Holiday Calendar.

Configuring Department Parameters

1 Open the Departments form.

2 Specify this information:

Department
Specify an abbreviation for the department.

Description
Specify a brief description for the department.

Facility
Specify the facility where the department is located.

3 Optionally, specify this information:

Payroll Department
Specify the department code by which the department is known to Payroll.

ERP Department
Specify the department code associated with the department or work center in the ERP.

4 Click **Save**.

Configuring Employee Types

Configure employee types to define parameters for employees with similar needs. You must define payroll schedules on the Payroll Schedules form before you can configure employee types.

1 Open the Employee Types form.

2 Initiate the new record process.

3 Specify this information:

Employee Type
This is a required field. The value you specify is the code that other Time Track forms and programs must use to refer to this employee type.

Description
Specify a brief description of the employee type.

Payroll Schedule
Select from the list of defined payroll schedules. This is a required field, so payroll schedules must be defined before you can configure employee types. The selected Payroll Schedule is the only link between operations and payroll activities in Time Track.

Configuring the General Tab

Specify this information on the **General** tab:

Default ABS Code
Specify a default employee absence code. When you click the **Generate Absence** icon on the Hours Summary form (the A Icon) an absence is generated matching the code you specify here. If this value is left blank, the absence record will be created without an absence code, so the record will go into Exception status. Use the pulldown menu on this field to see a list of active absence codes.

Labor Posting to ERP
Specify when or whether labor hours will post to the underlying ERP. The default value is **Real Time**, which posts labor when a job stops, when an hours record is processed, or when you click **Save**. **After Processing** posts hours only when an hours record is processed. **Do Not Post** never posts recorded hours to the underlying ERP.

Process to Payroll
Select this option to forward captured hours to payroll. When this option is selected, processing of hours in the Hours Summary and Detail must create Payroll Detail records.

Remarks Mandatory
Select this option to require users to enter a remark before any modified record can be saved.

Use Absence Approval System
Select to require supervisor approval for absence requests.

Elapsed Time Data Capture
Select to record elapsed time hours rather than clocked hours.

Stop Only Transaction
This parameter is displayed only if an employee is not configured for **Elapsed Time Data Capture**. Select this check box to only require jobs to be stopped. When a job is stopped, a job start transaction is generated to occur immediately following the prior transaction. For example, if you clock in at 8:00 and stop job ABC at 9:00, a start job transaction for job ABC is generated at 8:00. Then, if you

stop job XYZ at 11:00, a start job transaction for job XYZ is generated at 9:00. Clocking out will stop the current job.

Combine Labor and Machine Time
Select this option to report machine time automatically as a ratio of labor time. Clear this option to only report labor.

Note: When the Time Track is implemented and this field is selected, the **Combined Labor and Machine Time** is selected on the labor transactions.

Use Attendance Point System Parameter
This field is used to activate the parameters for configuring the Attendance Point System. The Attendance Points System assigns point values to absence hours and work rule violations. Point value thresholds are defined and organized into **Tracks**. When an employee's point values cross a threshold the supervisor is prompted and notified of the corrective action that is to be performed. Multiple **Tracks** can be configured to monitor attendance issues with various levels of severity.

Allow Signature After Processing
If this check box is selected, both the employee and supervisor can sign the hours at any time, before processing, after processing or after payroll processing. The parameter is applicable for both Clocked and Elapsed time employee types. Signatures entered after processing do not update **submitted** or **processed** fields.

Prompt for Employee Signature Before Processing
If the check box is selected, the supervisor receives a prompt when processing hours without an employee's signature. Both the **Approve** and **Process** fields are defaulted with the processor's signature and the **Employee signoff** field remains blank.

Attendance Posting To ERP
If the check box is selected, attendance transactions (clock in, clock out, lunch/break in, lunch/break out) are posted to ERP when the report date of these transactions are processed. If the field is cleared, only labor and absence hours are posted to ERP.

Configuring the Punch Parameters tab

Specify this information on the **Punch Parameters** tab:

Clock In Rules
Defines adjustments and tolerances that must be applied to attendance transactions entered for a schedule punch time.

Grace Time
Specify a grace period before or after the scheduled clock-in, clock-out, lunch/break punch-out, and lunch/break punch-in times. Grace times are expressed in minutes and represent the amount of time for which a variance from the scheduled punch event will be accepted without an error. Punches that occur within the grace period will be adjusted to the scheduled in or out time. Punches that occur outside the grace period will not adjust and will go into an exception status. The **Error Code** field in the Hours Detail form explains the exceptions.

Tolerances
Specify a period outside of the grace period where punches will be accepted without triggering an adjustment or exception. Tolerances are expressed in minutes. Punches that occur outside of the grace period but within the tolerance period will be adjusted or put into exception status. Punches that occur outside the tolerance period will not adjust and will go into an exception status. The Error Code field in the Hours Detail form explains the exceptions.

Remarks Required
Each Tolerance field has a corresponding check box labeled, "Remarks Required." When the check box is left blank no remark is required to authorize a punch outside of the tolerance. When the field is checked, the user will need to enter a remark before they will be allowed to authorize the exception on the punch.

Job/Indirect Tasks
Specify these information:

Auto Stop Clock Out
Select this option to automatically stop the employee€™s running job when they clock out.

Auto Start Clock In
When this option is selected, a job that was automatically stopped on the previous clock out will be restarted.

Auto Stop Lunch/Break Stop
Select this option to automatically stop the employee€™s running job when they clock out for a lunch or a break. When this option is cleared and a running job exists when a clock out is attempted, the user will be prompted to close the running job before attempting to clock out.

Auto Start Lunch/Break Start
When this option is selected, a job that was automatically stopped on the previous clock out for a lunch or a break will be restarted when clocking back in. When this option is cleared, no job will be started when clocking in from a lunch or break.

Max Auto Adjustment Between Jobs
Specify the maximum duration that a job start may be adjusted back to eliminate a gap in labor activity. This parameter is used to eliminate gaps between attendance transactions or to eliminate gaps between the current job start and the last job stop. If the time gap is larger than the value specified, then no adjustment will occur, and the unaccounted-for time will create a booking error (**B** status) for the record. The format is HHMM and the default value is 0 (zero minutes).

ERP Fill Code
Specify the indirect task used when you click **Gap Fill** on the Hours Summary form or Hours Detail form. This task must be a valid task as defined on the tasks form.

Max Gap Without Exception
Specify the maximum length of time a gap record may have without generating an exception. Gap records with durations less than the value in this field will be accepted without exception. The format is HHMM and the default value is 0 (zero minutes).

Auto Fill Gaps
Select this option to automatically fill all gaps.

Adjust Last Job When Clock Out
If this check box is selected, auto adjust does not take place on the stop time of the last job. Any gap between the last job stop and clock out is filled with a Gap record.

Overtime
Specify these information:

Authorize OT Required
Select to put Hours Summary records that are greater than the specified shift day into Exception status. If this check box is cleared, the Authorized OT and Double time is added to the standard shift day to determine the threshold for hours worked in a day before putting the record into Exception status..

Complete Week Required For
If there is no requirement that a complete week be worked in order to receive overtime, leave this field blank or select **None**. If there is no complete week requirement for overtime, but there is a requirement for double time, select **Double Time** . If there is a requirement for overtime and double time, select **Both**. The workcodes specified in this form are applied to the hours clocked on the non-working days of the shift week when a complete week requirement is not met. There are two sets of parameters, one for the Weekly OT methods and the other for the Daily and Weekly OT methods. When a complete week is met the workcodes specified in the employee's shift are applied to hours worked on non-working days.

Complete Week Not Met For OT
Specify the workcode to use on non-working days when the complete week requirement for overtime is not met. If the complete week requirement is met, hours clocked on non-working days will use the workcode specified for the shift.

Complete Week Not Met for DT
Specify the workcode to use on non-working days when the complete week requirement for double time is not met. If the complete week requirement is met, hours clocked on non-working days will use the workcode specified for the shift.

Daily and Weekly OT
In the Daily and Weekly OT method, overtime is determined by the number of hours worked during each shift day. When a complete week is worked, usually the overtime and double time thresholds are lower on the non-working days. However, if a complete week is not met, the non-working days use standard thresholds or thresholds that are higher than those specified for the shift. The Daily and Weekly parameters are stated in HHMM format.

Complete Week Not Met for Reg
Specify the number of regular hours to be worked in a day before hours are categorized as overtime, if a complete week is not worked. For a dynamic shift, these are the first hours worked. For a static shift, these are the first hours worked after the shift start.

Complete Week Not Met for OT
Specify the number of overtime hours in a day that can be worked before hours are categorized as Double time.

Complete Week Not Met for DT
Specify the number of double time hours that can be worked before the report date is put into Exception status for too many hours worked.

Complete Week Not Met for OT Before Shift
Configure this field only if hours are booked against shifts that are Static AND contain a Daily component in the OT Method. Specify the number of OT hours to authorize prior to shift start.

Complete Week Not Met for DT Before Shift
Configure this field only if hours are booked against shifts that are Static AND contain a Daily component in the OT Method. Specify the number of DT hours to authorize prior to start of OT Before Shift. Hours entered prior to this threshold triggers an exceptions for working too many hours on a report date.

Rounding Parameters
Grace period adjustments and Rounding Parameters must be configured to evenly integrate with one another. If this is not done conflicts in the configuration may cause the adjustments or rounding to occur incorrectly.

Punch Types to Round
Specify whether to round punches or not. If you leave blank, no rounding occurs. If you specify **Attendance**, In and Out transactions that occur outside of the periods defined in the Grace and Tolerance Matrix will round per the other parameters defined in the Punch Rounding section. If you specify Attendance and Labor, additionally all job starts and stops is moved to round.

Punch Rounding Intervals
Specify the desired rounding increment. For example, if you set this parameter to 5, punches are rounded to 5-minute times. The value must be a whole integer that is a factor of an hour (60 minutes). Allowable values are 0, 1, 2, 3, 4, 5, 6, 10, 12, 15, 20, and 30.

In Punch Rounding Interval Split
Specify the point in the interval at which punching in will round up versus down. A value of 0 will round everything down, while 1 will round everything up. A value of 3 in a 10-minute interval will round punches of 1 and 2 minutes into the interval down, and punches starting with 3 minutes into the interval up.

Out Punch Rounding Interval Split
Specify the point in the interval at which punching out will round up versus down. A value of 0 will round everything down, while 1 will round everything up. A value of 3 in a 10-minute interval will round punches of 1 and 2 minutes into the interval down, and punches starting with 3 minutes into the interval up.

Adjust Forward Clock Ins After Grace, **Adjust Backward Clock Outs Before Grace**, **Adjust Forward Lunch/Break Ins After Grace**, and **Adjust Backward Lunch/Break Outs Before Grace**: These parameters are all stated in HHMM. These parameters define an additional penalty for punches that occur outside the Grace/Tolerance period. These parameters are considered clock-in rules and take precedent over any rounding rules. Rounding rules take effect on any punches that occur after the adjustments made by these parameters.

For example, the **Adjust Forward Clock Ins After Grace** value adjusts the clock-in to the nearest specified increment if an employee clocks in later than the tolerance for the grace period. Consider an example in which a shift begins at 8:00 with a grace period of 5 minutes, tolerance of 10 and an **Adjust Forward Clocks Ins After Grace** value of 15. If an employee clocks in at 8:11, Time Track adjusts the clock-in to 8:15.

Configuring the Holidays tab

The **Holidays** tab contains parameters that define how Holiday Absence Hours and Clocked Hours on a Holiday are to be treated.

Specify this information:

Holiday ABS Code
Specify a default holiday absence code. This is the absence code that will be generated when the A icon is used for a holiday report date or when the Holiday Generator is run. Only codes that are configured as Holiday ABS types may be entered on Holiday Report Dates.

Use Holiday Calendar
If the check box is selected, the Holiday Calendar is used to specify which report dates are Holiday Report Dates. .

Report Date Adjustment
Holidays may be configured with a Report Date Adjustment of Previous or Next. If this parameter is selected and the employee is on a shift where the Holiday Report Date falls on a Non-Working Day the holiday is moved to the Next or Previous Work Day. If the Holiday is configured with a Report Date Adjustment of None, regardless of the setting of this parameter the Holiday is not moved. If this parameter is cleared, irrespective of the Holiday configuration, the Holiday is not moved. The direction of the offset is defined in the holiday report date configuration.

Check Holiday Eligibility
If this parameter is selected the previous scheduled work day is checked to determine if a full day was worked. If a full day was worked, the holiday absence is generated and put into a Ready status. If a full day was not worked, the holiday absence will go into an exception status. If you clear this option, no check of the previous work day will be performed.

Allow Clock In
Select to allow clock ins on holiday report dates and to display the Clocked Hours On A Holiday portion of the **Holiday** Tab.

Clocked Hours On Holiday OT Eligible
Select to count clocked hours on a holiday towards the Overtime Thresholds specified in the employee's shift configuration.

Clocked Hours Work Code
If you specify **Regular**, **Overtime**, or **Double Time**, this sets how the hours categorize regardless of where they occur or how many hours there are for the week. If you specify **OT Eligible**, clocked hours on a holiday will categorize per the OT Method specified in the employee's shift configuration.

Regular Hrs, Overtime Hrs, Double Time Hrs
Configure this field only if hours are booked against shifts that contain contain a Daily component in the OT Method. Specify the number of Regular, Overtime and Double time to authorize using the HHMM format.

Overtime Before Shift and Double Time Before shift
Configure this field only if hours are booked against Static shift types that contain a Daily component in the OT Method. Specify the number of Overtime Before Shift and Double Time Before Shift to authorize using the HHMM format.

Premium Codes - Regular, OT, DT, OT Before Shift and DT Before Shift
When premiums are applied to Clocked Hours on a Holiday, specify the premium code for each hours type.

Include Clocked Hrs with Non-Hol Clocked Hrs
Select **Include Clocked Hrs with Non-Hol Clocked Hrs** to display hours clocked on a holiday in payroll along with hours clocked on non-holiday report dates. If this option is not selected, payroll ID fields appear for each work code and hours will appear separately in payroll.

If you clear the **Include Clocked Hrs with Non-Hol Clocked Hrs** option, specify values in each Payroll Code field. These values will serve as the identifier of the hours type in payroll. These values will appear adjacent to the clocked hours on a holiday in the payroll extract.

Configuring the Quantities tab

The **quantities** parameters specify how quantity reporting is executed in the RealTime Transaction form, Elapsed Detail and Dashboard Transaction forms. The parameters are active for all Time Track integrations.

Specify this information on the **Quantities** tab :

Allow Quantity Reporting
The filed is selected by default. If **Allow Quantity Reporting** parameter is selected the RealtimeTransaction form allows all currently implemented quantity reporting features. If **Allow Quantity Reporting** parameter is cleared all quantity reporting and reject fields are not displayed on the RealtimeTransaction form. The **Open Quantity** field is displayed irrespective of this setting.

Note:

- In SL Integrations, if this parameter is selected on the **Quantity** Tab (**Allow Rejected Quantities**, **Allow Out of Sequence Reporting**, **Restrict Qty**, **Complete to Qty Received** and **Allow Operation Complete**) fields are active and displayed.
- In LN Integrations, If this parameter is selected the primary parameters on the **Quantity** Tab (**Allow Rejected Quantities**, and **Allow Operation Complete**) fields are active and displayed.
- For both integrations, if this parameter is cleared the primary and secondary parameters are not displayed.

Allow Rejected Quantities
If this parameter is selected the reject field is displayed on the transaction forms and entry is accepted.

Use Reason Code for Rejected Quantity
This field is implemented for LN integration only. However, the field is not displayed in SL integrations. If the parameter field is selected, a reason code must accompany rejected quantities. If the parameter field is cleared, the reason code is not specified for reporting the rejected quantity.

Note:

- To post the rejected quantity in LN without using a reason code, LN must be configured to accept such requests.
- If LN is not configured to accept the rejected quantity transaction without a reason code, the transaction remains incomplete and is updated with a booking error status in TT.

Allow Out of Sequence
In Syteline, this parameter provides the user, the ability to move the quantity to the selected operations not in a sequential order. This parameter also works on the same functionality in TimeTrack. If the parameter field is selected, the user is allowed to move quantities to any open operation in the routing.

Restrict Qty Complete to Qty Received
Syteline does not require that quantities be moved to an operation in order to report completions at that Operation. If the parameter field is cleared, TimeTrack allows the same. If the parameter field is selected, Time Track does not allow the user to complete an operation by moving more quantities to the operation. However, the user is not allowed to move quantities from an operation sequence to another one to set the operation status to complete.

Note:

- This field is displayed, only if Allow Quantity Reporting parameter is selected.
- This check box is displayed for SL integration parameters only.

Allow Complete operations
If this field is selected the **Complete Operation** and **Complete All Operation** check boxes are displayed on the RealtimeTransaction.TS and are editable. If this field is cleared the **Complete Operation** and **Complete All Operation** check boxes are not displayed on the RealtimeTransaction.TS.

Default Operation Complete
If this parameter is selected the **Complete Operation** field is automatically selected, when the completed and the rejected quantity results in zero open balances at the operation. For SL integrations all completed quantities are moved from the operation to automatically set the operation to complete. The quantity completed remains the same as to the open quantity, with no quantity to move out of the operation.If this parameter is cleared the **Complete Operation** field is not automatically updated.

Note: This field is displayed, only if the **Allow Complete Operation** parameter is selected

Configuring the Workset tab

An employee is designated as a Workset employee based on the employee record. A Workset employee is one that is allowed to book to multiple labor activities at the same time. The grouping of these labor activities is referred to as a Workset. The time spent on activities within a Workset are prorated based on the setting of the parameters on this tab. If labor and machine reporting are combined a separate parameter is provided to specify how machine time must be prorated.

Specify this information:

Labor Proration
Specify how to divide labor between multiple jobs on a workset:

- **Straight**: Labor is divided evenly among all jobs. For example, if a workset has three jobs and is run for 120 minutes, 40 minutes of labor will be allocated to each job.
- **Run Time**: Time is allocated to jobs based on their run time. A job run time is either its run duration (hours/pieces) multiplied by its released quantity, the setup time is added to this number if the **Include Setup in Runtime check box** is selected, or its fixed schedule duration. To determine the percentage of the total time to allocate to each job on a workset, this equation is used: workset run duration X (job run time / total run time of all jobs on the workset). For example, a workset has three jobs: Job A, Job B, and Job C with runtimes of 60 minutes (Job A), 30 minutes (Job B), and 15 minutes (Job C). This workset is run for 120 minutes, so 69 minutes is allocated to Job A (120 min X (60 min / 105 min)), 34 minutes is allocated to Job B (120 min X (30 min / 105 min)), and 17 minutes is allocated to Job C (120 min X (15 min / 105 min)).
- **Planned Quantity**: Time is allocated to jobs based on their planned quantities. To determine the percentage of the total time to allocate to each job on a workset, this equation is used: workset run duration X (planned quantity of the job / total planned quantity of all jobs on the workset). For example, a workset has three jobs: Job A, Job B, and Job C with planned quantities of 100 pieces (Job A), 50 pieces (Job B), and 25 pieces (Job C). This workset is run for 120 minutes, so 69 minutes is allocated to Job A (120 min X (100 pieces / 175 pieces)), 34 minutes is allocated to Job B (120 min X (50 pieces / 175 pieces)), and 17 minutes is allocated to Job C (120 min X (25 pieces / 175 pieces)).

Machine Proration
Specify how to divide labor between machines used for multiple jobs on a workset: Machine proration is slightly different than Labor proration. Where labor proration applies the proration to each job in the workset, machine proration only prorates time on machines that have multiple jobs from the workset running on them. The examples below illustrate this point.

Note: If you specify a machine ratio for a machine, the ratio will be applied after the proration method has been calculated. For example, if 60 minutes are allocated to a machine based on the proration method, and the machine has a machine ratio of **.75**, the final time allocation to the machine will be 45 minutes.

- **Straight**: Time is allocated to each machine used. If a single machine is used for more that one job on the workset, the time for that machine is allocated evenly among those jobs. For example, if a workset has three jobs, two that use Machine A and one that uses Machine B, and that workset is run for 120 minutes, 120 minutes (60 minutes for each job) will be allocated to Machine A and 120 minutes will be allocated to Machine B.
- **Run Time**: Time is allocated to each machine used. If a single machine is used for more that one job on the workset, the time for that machine is based upon the individual run times of those jobs. A job run time is either its run duration (hours/pieces) multiplied by its released quantity, the setup time is added to this number if the **Include Setup in Runtime check box** is selected, or its fixed schedule duration. To determine the percentage of the total run duration of the workset that is allocated to a machine used for multiple jobs, the run time of each individual job is divided by the total run time of all jobs using that machine. For example, a workset has three jobs, two that use Machine A and one that uses Machine B. The two jobs that use Machine A have run times of 60 minutes and 30 minutes for a total of 90 minutes. The job that uses Machine B has

a run time of 15 minutes. The workset is run for 120 minutes. 120 minutes will be allocated to Machine A: 80 minutes for Job A (120 min X (60 min / 90 min)) and 40 minutes for Job B (120 min X (30 min / 90 min)). 120 minutes will be allocated to Machine B (120 min X (15 min / 15 min)).

- **Planned Quantity**: Time is allocated to each machine used. If a single machine is used for more that one job on the workset, the time for that machine is based upon the planned quantities of those jobs. To determine the percentage of the total run duration of the workset that is allocated to a machine used for multiple jobs, the planned quantity of each individual job is divided by the total planned quantity of all jobs using that machine. For example, a workset has three jobs, two that use Machine A and one that uses Machine B. The two jobs that use Machine A have planned quantities of 100 pieces and 50 pieces for a total of 150 pieces. The job that uses Machine B has a planned quantity of 25 pieces. The workset is run for 120 minutes. 120 minutes will be allocated to Machine A: 80 minutes for Job A (120 min X (100 pieces / 150 pieces)) and 40 minutes for Job B (120 min X (50 pieces / 150 pieces)). 120 minutes will be allocated to Machine B (120 min X (25 pieces / 25 pieces)).
- **Labor Dependent**: Time is allocated to each machine based on the number of jobs on the workset and how many of them use that machine. Time is distributed evenly to each job on the workset and to the machines used for those jobs. For example, if a workset has three jobs, two that use Machine A and one that uses Machine B, and that workset is run for 120 minutes, 80 minutes (40 minutes for each job) will be allocated to Machine A and 40 minutes will be allocated to Machine B.
- **None**: All machines are allocated the full time. For example, if a workset has three jobs, two that use Machine A and one that uses Machine B, and that workset is run for 120 minutes, 120 minutes will be allocated to each machine.

Include Setup in Runtime
This field is only displayed if Run Time is selected in the **Labor Proration** or **Machine Proration** fields. Select this check box to include setup time when calculated the run time for a job.

Configuring the Attendance Point System

The **Attendance Points** and the **Attendance Threshold** tabs are enabled if the Use Attendance Point System Parameter is selected in the **General** tab.

1 This tab is used to define the characteristics of the Attendance Points System:

- measurement period
- use of partial incidents
- threshold for partial incidents
- use of incident forgiveness
- use of incident notices

On the tab specify the following information:

Measurement Period
There are two scenarios for defining a measurement period. This field can be set to **Rolling 12** or **Tracking Year**.

- **Rolling 12**: When rolling 12 is selected as the measurement period the application evaluates the Incident Table for the period starting at the current report date less 365 up until the current report date(Measurement Period =(Today-365) to Today) to determine the employees Attendance Incident total.
- **Tracking Year**: Tracking Year measurement period compares the incident report date with the records in the emp_time_off_group_change table. The tracking year scenario to set the beginning and ending of the measurement period. This method extends the tracking year concepts developed for the Absence Request system to the Attendance Point System.

Use Incident Threshold
This field can be set to **Yes** or **No**. The default for this field is **No** An incident is a violation of a clock in rule (that is; Exception or X) or absence hours associated with an Incident absence code.

- When set to **No** the full value of an incident must be applied irrespective of the incident's time length.
- When this field is set to **No** the partial incident configuration fields must be disabled .
- The Partial X Incident Duration is used to define the partial incident threshold for clock in rule violations.
- For Incident ABS Types Partial Incident Duration is defined on the Absence code configuration form.
- When the field is set to **Yes** incidents that with a duration less than the Partial Incident Duration parameter must apply the partial incident value. Incidents with durations greater than the Partial Incident Duration parameter must apply the full value of the incident.
- The format for these fields on both the Employee Type and Absence form is `HHMM`.

Partial X Incident Duration
This field is enabled when the **Use Incident Threshold** field is set to **Yes**. This field is applicable for Exceptions Incidents only. Exception Incident values are defined in the Incident value section of the **Attendance Points** tab.

Allow Incident Forgiveness
This field can be set to **Yes** or **No**. The default setting is No.

- When set to **Yes** an incident's point value must be nullified by forgiving the incident during incident processing.
- Forgive icons are available on the hours summary and detail forms for both **Clocked** and **Elapsed** employee types.

  a When invoked from a hour summary form all incidents associated with the selected summary records must be set to **Forgiven** status.

  - The Status of the incident on the Employee Absence Tracking Form must be updated to **Forgiven**.

    Note: For Weekly Elapsed employees, when the Forgiven icon is invoked from a hour Summary form all incidents in the selected work week must be set to **Forgiven** status.

- On the hours detail forms forgiveness is performed on both the Global or on the Specific records.
  - **a** Global Forgiveness occurs when no detail records are selected within the selected report date
  - **b** Specific Forgiveness occurs when a detail record is selected within the selected report date.
    - **1** For weekly elapsed employees global forgiveness must have all the incidents in the selected work week set to **forgive** status.
- An incident is set to **forgiven** status at any time before or after Hours Processing or Payroll Processing.
- Forgiven incidents do not count for Perfect Attendance.

Generate Incident Notices
Disciplinary notices include emails and prompts messages that notify the users when a disciplinary threshold is crossed. This field can be set to **Yes** or **No**. The default setting is **No**. When this field is set to **Y**, with the Incidents with email is also set to **Y** and the Reminders have a value which is not equal to **None**, then the user receives emails and or prompts messages. Notices are generated when an ABS record is created or an exception occurs that causes the incident value to exceed the threshold of a tracked level.

Incident Values
Incidents are variances from the clock in rules defined in shift configuration. The values are displayed in the Hours Summary and Detail forms as **Exceptions, X**. This section specifies the full and partial values the Attendance Points System assigns to each type of exception.

Track Names

- Track Name: Defines the name of the set of rules a series of points thresholds refers to.A Track is a set of rules that specifies the type of transactions for tracking by the Attendance Points system and the actions must be performed when an employee’s point totals exceed defined points thresholds. There is provision to define multiple Tracks to specify separate tracks for attendance events of various level of severity.
- A Track is a set of rules that specifiesSequence: Defines the sort order of track thresholds. When threshold of multiple tracks are crossed by the same incident this value is used to determine the process to handle generation of prompts.
- ABS Incident: Absence codes can be configured using the Incident Absent Type that helps in the increment for an Employee’s incident value. When this field is set to **Yes** ABS hours associated with Incident Absence Types helps for the increment of the employee’s incident total while processing. When the field is set to **No** this type of ABS hour are omitted from the employee’s attendance points tracking.
- Exception Incident: When this field is set to **Y** any attendance transaction that generates an exception with an Incident Value helps for the increment of the employee’s total incident value. When it is set to **No** this type of ABS hour are omitted from the employee’s attendance points tracking.
- NoCallNoShow Incident: This is an Absence Type. ABS hours associated with this Absence Type are deemed to be a more serious infraction of the attendance policy. When the field is set to **Yes** this absence type is tracked. When the field is set to **No** this type of abs hour are omitted from the employee’s attendance points tracking.

- Threshold Basis: This parameter defines the process of incident values' accumulation. The alternatives are **Sum** or **Count**. When the field is set to **sum** incident values are summed to determine the employee's Total Incident Value. When the field is set to **Count** the occurrences of incidents are counted to determine progress towards the Track's incident thresholds.
- Process Notices: When **Generate Notices** is set to **Yes** and a threshold is crossed that requires an action, the user receives a reminder prompt message till the time the user acknowledges the incident by setting the status to **complete** on the Employee Absence Tracking form.
- Default Track: Several forms in TimeTrack display an employee's status within a Track and the related Total Incident Value. When there are multiple tracks defined, this parameter designates the required track to display. The forms that display the employee's Default Track are EmployeeAbsenceRequest.TS, EmployeeAbsenceRequest (Non-Touch Screen), Employee-Absence Tab and EmployeeAbsenceTracking.

2 The **Attendance Threshold** tab is used to define the points thresholds and actions required when an employee's total incident value crosses a threshold. For each Track a sequence of thresholds must be defined. At each threshold you can specify the action that must be performed, whether or not to generate an email to the supervisor, on which events to prompt the supervisor that an action must be processed and the text to use in the prompts message.

Disciplinary Notice Threshold Configuration

Disciplinary Notice Threshold Configuration defines the levels and level thresholds for each track defined in Track Names. Thresholds are the break points where incident values move an employee from one Level to the next level. Levels may specify actions the supervisor must take. Generally, the action specified increase in severity as the level increases.

Track
Any Track defined in Track Names appears in the pulldown list for this field. Select the Track Name of the specified the threshold. A threshold can be for only 1 track.

Level
Levels categorize incident totals. As an employee's total incident value increases the employee is moved to higher levels. The lowest level is **Perfect attendance**. Perfect attendance is generally defined as a Total Incident Value that is equal to 0. The Perfect level is followed by Level 0 through Level 15.

Incident Value, Threshold and Days
The combination of Incident Value, Threshold and Days defines the threshold for that level.

- Incident Value is the Total Incident Value accumulated.
- Threshold states the limit the incident value can accrue to in order to qualify for the level.
- Days states the duration in which the Threshold applies.

Action
Describes the action the supervisor must take in response to cross into a new level. **No Action** is used to suppress notices and processing requirements. Any other value must be displayed in prompts messages, emails, reminders and on the Absence Summary History table.

Email
When this parameter is set to **Yes**, supervisor and administrator profiles that are authorized for the employee's Work Group with the field **Receive Disciplinary Notices** set to **Yes** receive an email of the Disciplinary Notice and an email when the supervisor receives a processing reminder prompt.

Reminder
When **Generate Incident Notices** and **Process Notices** are set to **Yes** and the **Reminder** fields is set to a value other than **None**, the supervisor must be prompted with a message, when a threshold that requires processing is crossed. These are the options:

- None: Processing is required but the supervisor receives no reminders.
- ABS Requests: The supervisor receives a reminder prompt when changing the disposition of an employee's absence request.
- Hours Processing: The supervisor receives a reminder prompt when processing the employee’s hours.
- Both: The supervisor receives prompts at Absence Request and Hours Processing.

  After the incident is set to **Complete** status on the Employee Absence Tracking form, then the reminder for the level is suppressed.

Message
This field displays the text in emails and reminders for the specific level.

3 Click**Save**.

Configuring Facility Parameters

1 Open the Facility form.

2 Specify this information:

Facility
Specify the facility. If you need to create a new facility, specify the facility information in the first blank row in the table at the left.

Description
Specify a brief description of the facility.

Payroll Code
Optionally, specify a payroll code. Payroll codes identify each record as originating from a particular facility.

ERP Code
Specify an ERP code. This value must match the code used in the underlying ERP to refer to the facility. The ERP code is the link that ties data in Time Track to the proper tables and accounts in the ERP.

Time Zone
Select the appropriate time zone where the facility is located.

3 On the **General** tab, select a start date and tracking year for the facility, payroll, and absence tracking calendars. Click **Facility Calendar** to make further edits to the facility calendar. Click **Facility Holidays** to edit holidays.

4 Specify this additional information:

ERP Shift
Specify an ERP shift code. This code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP.

Allow Offset Posting
Select to automatically zero out frozen posts by posting an offsetting negative value; for example, a frozen post of 4 hours will be offset by an automatic post of -4 hours. Clear this check box to return an ERP error in response to a frozen post.

Allow Repost
Select to allow edited transactions to repost in the ERP. Clear this check box to return an ERP error in response to a reposted transaction.

Use Global Posting
Select to specify how to handle problematic records involving a specific employee number and report date combination. Consider an example in which an employee posts a group of four records in which the third record contains an error. Select this check box to block posting of all four records. Clear this check box to post records 1, 2, and 4, and block only record 3.

Payroll Output Location
Specify the filepath to which Time Track will save payroll extracts.

5 On the **Dashboard Colors** tab, click the appropriate **Colors** button to select a color format to denote record status as **Ready**, **Absent**, **Working**, **Booking Error**, **Exception**, or **Holiday**. Specify a foreground (text) color and a background color and view the result in the **Sample** field. When finished, click **Save and Exit**.

6 On the **Payroll Colors** tab, click the appropriate **Colors** button to select a color format to denote record status as **Ready**, **Not Submitted**, or **Payroll Processed**. Specify a foreground (text) color and a background color and view the result in the **Sample** field. When finished, click **Save and Exit**.

Configuring Holidays

1 Specify whether to configure holidays by facility or by site.

To specify holidays by facility, click **Facility Holidays** on the **General** tab of the Facilities form.

To specify holidays by site, click **Site Holidays** on the **Calendar Setup** tab of the Site Parameters form.

Note: You also can configure new holidays or view existing holidays by double-clicking the report date in the Facility and Site calendars. Holidays defined from the Site calendar will be Site holidays, while holidays defined from the Facility calendar will be facility holidays.

2 On the Holidays form, select a row from the grid at left, then specify this information:

Date
Specify the date on which a holiday will occur.

Facility
If you are creating a Facility holiday, specify the facility that will observe this holiday. If you are creating a site holiday, this field is unavailable.

Description
Specify a brief description of the holiday.

Process Vacation Hours
Select to allow employees to take vacation hours on a holiday.

Report Date Adjustment
Specify **Previous**, **Next**, or **None**. If a holiday falls on a non-working day for an employee, the **Report Date Adjustment** value specifies whether the holiday will be adjusted to the prior working day, the subsequent working day, or not adjusted. For example, a shift week that starts on Tuesday may have Monday and Tuesday defined as non-working days. When **Report Date Adjustment** is set to **None** or the employee type has this parameter deselected, programs that automatically generate holiday absence hours would not do so for employees on this shift.

3 Click **Save**.

Generating Holidays

Use the Holiday Generator form to generate holidays hours for employees. You can use the Holiday Generator form to generate holiday hours manually or can configure to automatically generate holiday hours as a background task.

The Holiday Generator form is also used to delete different ABS records for both Holiday and Non-holiday report dates. See Scheduling Background Tasks for more information about configuring automatic tasks.

To generate holidays manually:

1. Open the Holiday Generator form.
2. To define criteria for generating holidays, specify starting and ending values for some or all of these fields:
   - **Employee**
   - **Report Date**
   - **Employee Type**
   - **Work Group**
   - **Department**
   - **Absence Type**
3. Optionally, to replace existing holidays, click **Regenerate**.
4. To generate holidays that match all specified criteria, click **Generate**.
5. To clear selection criteria after running the Holiday Generator, Select **Clear**.
6. To delete ABS records for both Holiday and Non-holiday report dates, specify starting and ending values for some or all of the above fields:
   - **Employee**
   - **Report Date**

- **Employee Type**
- **Work Group**
- **Department**
- **Absence Type**

Note: The ABS Records that are hours processed, are not deleted.

When no selection criteria are specified all records that match the selected filters are deleted.

7 The **Include Holiday Report Dates** check box is selected by default. When the check box is selected, the ABS records on the Holiday Report Dates that match the selection criteria are deleted.

Note: If the **Holiday Report Date** is configured to allow vacation abs hours as a substitute, then the Vacation ABS types are available in the Absence Code selection criteria.

8 When the **Include Non-Holiday Report Dates** check box is selected, then the ABS records on the non-Holiday report dates are deleted. ABS Codes (such as, Vacation, Generic, and Sick) are displayed.

Note:

- When the **Include Non-Holiday Report Dates** is selected, you receive a confirmation message to select the data that contains non-holiday report dates. You can also continue or cancel the absence hours.
- The **Include Non-Holiday Report Dates** includes Vacation, Generic and Sick Absence types. The Incident or NCNS ABS types are not included in the selection criteria.
- The Include Non-Holiday Report Dates does not include requested or approved ABS Requests.

9 When the **Include ABS Requests** check box is selected, ABS requests that match the selection criteria and that are not processed to payroll (“hours processed”) can be set to denied state. Also, the corresponding ABS records are deleted. This parameter deletes requests for both Holiday Report Dates and Non-Holiday report dates regardless, of the above parameters configuration. The Include Non Holiday confirmation message displays prior to deleting the records.

10 When the **Include Approved ABS Requests** check box is selected, Approved ABS requests that match the selection criteria and that are not processed to payroll (“hours processed”) can be set to denied state. Also, the corresponding ABS records are deleted.

Note:

- This parameter deletes requests for both the Holiday Report Dates and Non-Holiday report dates, regardless of the above parameters configuration.
- This parameter only deletes ABS records that are created in the ABS Request System.
- The Non-Holiday Confirmation message is displayed prior to deleting the records.

11 The selection criteria is displayed on the screen after performing the delete. Select **Clear** to reset the selection criteria to blank.

12 Click **Delete** to remove the specified ABS records.

Note:

- The form does not delete any processed ABS records.

- The form does not delete Attendance, Labor, Gap or Break record types specified for the selected dates.
- If the User Clicks **Delete** with **Include Non-Holiday Report Dates**, **Include ABS Requests** or **Include Approved ABS Requests** filters selected, then the Non-Holiday Report Date confirmation message is displayed.

Configuring Payroll Schedules

1 Open the Payroll Schedules form.

2 To update an existing payroll schedule you can move to the next step.

3 To create a new payroll schedule select a blank line from the grid at left, then specify this information:

Payroll Schedule
An ID for the payroll schedule.

Description
A brief description for the payroll schedule.

Facility
Select the facility to use this payroll schedule.

4 The Payroll Year and payroll calendar start date are defaulted in from the Facility form. This confirms the correct reference for the payroll start date and payroll year. You can updatethe Payroll Start Date and Year on theFacility form if the values do not refer the correct date or year.

5 From the Payroll Generation list, specify whether payroll will be processed weekly, bi-weekly, monthly, or semi-monthly.

Note: Payroll periods processed on a semi-monthly basis will start on the first and fifteenth day of the month.

6 In the Extract Format section, specify this information:

Extract Structure
Select one of these structures to determine how information should be displayed on the extract:

- **Single Record Per Employee**: Select to generate one record per employee.
- **Clocked and Alternative Hours Records**: Select to generate multiple records for each employee, one for clocked hours and one that summarizes each absence code found in the payroll period.
- **Breakdown by Hours Type**: Select to generate one record for each hours code, including clocked hours.

Hours Format
Select a format for displaying time: **Hours/Minutes** (0815) or **Fraction of an Hour** (8.15).

Fixed Length
Select to specify lengths for fields on the extract. Clear to separate fields on the extract with commas. The **Len** and **Just** fields are enabled when this checkbox is selected.

Submit Net Change on Reprocessing Extract
Select to only reprocess data that has changed, when re-extracting records. Clear to reprocess all data, when re-extracting records.

7 In the Hours Codes section, if you specified **Breakdown by Hours Type** for the **Extract Structure**, specify the hour codes to display adjacent to the clocked hours categorizations for regular time, overtime, and double time on the extract.
8 In the Extract Configuration section, specify the position and, if applicable, length and justification for information on the extract.
9 To create the payroll schedule, click **Generate Payroll Schedules**.
10 To show the payroll schedule on a calendar, click **View Payroll Calendar**.

Modifying Payroll Records After Processing

Use the Payroll Details form to modify payroll records after they have been processed. Records can no longer be modified using the Hours Summary and Hours Detail forms once payroll has been processed. To modify payroll records after processing, you must be authorized to do so on the **Privileges** tab of the Work Groups form. There are two ways to modify payroll records that have been processed: you can modify individual records or you can modify the hours totals for a pay period.

If the payroll records have already been extracted to a CSV file, you can still modify them. However, you must first "re-open" the records on the Payroll Details form by selecting them and clicking **Reopen Payroll** in the toolbar. To re-open payroll records, you must be authorized to do so on the **Privileges** tab of the Work Groups form. After re-opening the records, follow the procedures described below to modify them. You will need to re-extract the records after modifying them.

You can modify individual payroll records or you can modify hours totals for a pay period.

See "Modifying Individual Payroll Records After Processing" on page 99.

See "Modifying Hours Totals for a Pay Period After Processing" on page 100.

Modifying Individual Payroll Records After Processing

1 Open the Payroll Details form.
2 From the list at the left, or from the Employee list, specify an employee.
3 Specify values for **Payroll ID** (payroll schedule) and **Pay Period**.

- Values for the **Status** , **Pay Period Complete** , and **Export Date** are displayed. These values depend on the specified employee and pay period.
- Values for the **Start Date** and **End Date** fields are displayed. These values depend on the specified payroll schedule and pay period.
- A grid at the bottom, showing detailed payroll information for each report date within the specified pay period, is displayed. At least one record is displayed for each report date. Additional records are displayed for each absence processed on that report date, or for each clocked or absence record eligible for a premium.

4 Modify the record values in the grid.

5 Click **Save**. The total fields in the Extract Calculation section are adjusted to reflect your changes. These adjusted totals are displayed in red to indicate that they have been modified after processing.

Modifying Hours Totals for a Pay Period After Processing

1 Open the Payroll Details form.

2 From the list at the left, or from the Employee list, specify an employee.

3 Specify values for **Payroll ID** (payroll schedule) and **Pay Period**.

- Values for the **Status** , **Pay Period Complete** , and **Export Date** are displayed. These values depend on the specified employee and pay period.
- Values for the **Start Date** and **End Date** fields are displayed. These values depend on the specified payroll schedule and pay period.
- The extract calculations, which summarize hours for the pay period, are displayed. This summary is presented in four arrays: clocked hours, clocked hours on a holiday, non-overtime-eligible hours on a holiday, and absence hours. Within each array, hours are separated by columns into regular hours, premium hours, and total hours.

Within the first three arrays, hours are separated by rows into regular, overtime, double time, and total hours. If overtime is calculated on a daily basis, additional rows are displayed for overtime and double time before the shift. A final row shows total hours.

4 In the **Adj** field, specify the new hours total. This value overrides the **Total** field. For example, to change holiday hours from 8 to 12, use the **OT** row in the Holiday array. Specify **12** in the **Adj** field.

5 The **Extract** field shows the information types included in the payroll extract and the sequence in which they will display.

6 Optionally, in the **Comment** field, specify why the hours totals were adjusted.

7 Click Save. The total fields in the Extract Calculation section are adjusted to reflect your changes. These adjusted totals are displayed in red to indicate that they have been modified after processing.

To undo an adjustment to the hours total, delete the value in the **Adj** field, leaving the field blank, and click **Save**. The **Total** field will revert to its original value.

Processing Payroll

10

After all labor records in a scheduled pay period have been approved and processed by operations personnel, you can process payroll . After payroll is processed, it can exported to the payroll extract.

Note: After payroll is processed, operations personnel will no longer be able to modify records using the Hours Summary and Hours Detail forms. To modify records after payroll processing, see "Modifying Payroll Records After Processing" on page 99.

1 Open the Payroll Summary form.
2 On the Payroll Summary form, specify selection criteria to determine which payroll records appear in the Records Grid. Specify a payroll schedule from the Payroll ID list. Use the Payroll ID arrows to show the previous or subsequent payroll schedule in the list.

   Note: See "Configuring Payroll Schedules" on page 98 for information on creating payroll schedules.

3 Specify a range of pay periods, employees, employee types, work groups, departments, and/or shifts to show. Leave a field blank to show all available records for that type.
4 Records that match your specified selection criteria are displayed in the bottom grid.
5 To only display records that are ready for approval and processing, select the **Submitted** filter. Ensure all other filters are cleared.
6 Select the check box to the left of each record you are processing. Optionally, click the **Select All** button to select all records.
7 To calculate premium records for the selected records, click the **Calculate Premium** button in the toolbar. Premium records are created.
8 Select the **Premium Calculated** filter, and clear the **Submitted** filter. The records for which premiums have been calculated and the premium records are displayed.
9 Select the check box to the left of each record you are processing. Optionally, click the **Select All** button to select all records.
10 Click **Payroll Process** in the toolbar.

Using the Payroll Details Form

Use the Payroll Details form to view and edit hours records.

See "Viewing Records Using the Payroll Details Form" on page 102.

See "Working with Records Using the Payroll Details Form" on page 102.

Viewing Records Using the Payroll Details Form

1 Open the Payroll Details form. The Payroll Details form shows detailed payroll information for a single specified employee during a single specified pay period.

2 From the list at the left, or from the Employee list, specify an employee.

3 Specify values for **Payroll ID** (payroll schedule) and **Pay Period**.

Values for the **Status**, **Pay Period Complete**, and **Export Date** are displayed. These values depend on the specified employee and pay period.

Values for the **Start Date** and **End Date** fields are displayed. These values depend on the specified payroll schedule and pay period.

The extract calculations, which summarize hours for the pay period, are displayed. This summary is presented in four arrays: clocked hours, clocked hours on a holiday, non-overtime-eligible hours on a holiday, and absence hours. Within each array, hours are separated by columns into regular hours, premium hours, and total hours.

Within the first three arrays, hours are separated by rows into regular, overtime, double time, and total hours. If overtime is calculated on a daily basis, additional rows are displayed for overtime and double time before the shift. A final row shows total hours.

Note: Any numbers displayed in red have been adjusted from their original values.

The **Extract** field shows the information types included in the payroll extract and the sequence in which they will display.

A grid at the bottom, showing detailed payroll information for each report date within the specified pay period, is displayed. At least one record is displayed for each report date. Additional records are displayed for each absence processed on that report date, or for each clocked or absence record eligible for a premium.

Records are sorted by report date and pay period day. To the right of these columns are classifications that show whether each record represents clocked hour or hours clocked on a holiday, what premium code (if any) applies, what absence code (if any) applies, or whether this record represents hours not eligible for overtime. The final columns show how many hours for each record are regular, overtime, double time, overtime or double time before the shift, or unpaid.

Working with Records Using the Payroll Details Form

1 Open the Payroll Details form. The Payroll Details form shows detailed payroll information for a single specified employee during a single specified pay period.

2 From the Payroll Detail grid, select one or more records.

3 To perform administrative functions, click the appropriate toolbar button.

Using the Payroll Summary Form

Use the Payroll Summary form to view and work with payroll records.

See "Viewing Records Using the Payroll Summary Form" on page 103.

See "Working with Records Using the Payroll Summary Form" on page 104.

Viewing Records Using the Payroll Summary Form

1 Open the Payroll Summary form.

2 Specify selection criteria to determine which payroll records appear in the Records Grid. Specify a payroll schedule from the Payroll ID list. Use the Payroll ID arrows to show the previous or subsequent payroll schedule in the list.

Note: See "Configuring Payroll Schedules" on page 98 for information on creating payroll schedules.

3 Specify a range of pay periods, employees, employee types, work groups, departments, and/or shifts to show. Leave a field blank to show all available records of that type.

4 Under Filters, select record types to show. Clearing a filter narrows the selection criteria.

5 The **Exact String** is displayed, which shows the list of fields, identified programmatically, that will be exported in the payroll extract (.csv file). Records that match your specified selection criteria are displayed in the bottom grid. This information is always displayed:

- Employee number
- Employee name
- Pay period: shows the number of the pay period in the current year. For example, for a monthly payroll, the first month is pay period 1, the second month is pay period 2, etc.
- Shift
- Start Date: shows the first date in this pay period
- End Date: shows the last date in this pay period

6 To view additional data fields, click **Summary**, **Clocked Hours**, **Clocked Hours on Holiday**, **OT Eligible ABS Hours**, **Non OT Eligible Hours**, or **Show All**:

- **Summary** is the default view. It shows totals for the pay period (including premiums) of regular, overtime, and double-time hours, overtime and double-time hours clocked before shifts, hours clocked on holidays, and unpaid hours. If a payroll extract has been generated, the date/time and user who generated the extract are shown.
- **Clocked Hours** shows clocked hours separately from premium hours for regular, overtime, double-time, and overtime and double-time before shifts.
- **Clocked Hours on Holiday** shows clocked hours separately from premium hours for dates designated as holidays. Categories shown are similar to those on the Clocked Hours view.
- **OT Eligible ABS Hours** shows regular, premium, and total hours for each category of absence hours.

- **Non OT Eligible Hours** shows regular, premium, and total hours for each category of non-overtime-eligible hours.
- **Show All** shows all available data fields.

Note: Any numbers displayed in red have been adjusted from their original values.

Working with Records Using the Payroll Summary Form

1. Open the Payroll Summary form.
2. Right-click a record. From the context menu, you can open other forms pertaining to this record (such as the Payroll Detail form).
3. To perform administrative functions, such as processing or reopening payroll records, select one or more records from the Records grid, then click the appropriate toolbar button.

Configuring Premium Codes

1. Open the Premium Codes form.
2. Select a row in the grid.
3. Specify a premium code, which will be used on the Absences and Shifts forms to apply a premium to an absence or portion of a shift.
4. Specify a description for the premium code.
5. Specify a premium rate, entered as a decimal. A positive value increases hours eligible for the premium, and a negative entry decreases eligible hours. For example, a premium rate of 0.50 specifies a 50% increase, or "time and a half".
6. The**Payroll Code** field is filled with the premium code. Accept the default, or specify a different value. On the "Payroll Details" form, this code will be associated with the hours generated by the premium.

Configuring Reduction Sets

To specify reduction set parameters:

1. Open the Reduction Sets form.
2. Select a blank line or an existing reduction set from the grid at left.
3. In the header, define the reduction set code and provide a brief description for the reduction set.
4. Specify this information for each break period:

Type
Specify a reduction set type. **Normal** is the default value and the only available value in this version of Time Track.

Functions
Define the reduction as a **Clock**, **Lunch**, or **Break** transaction.

Paid
Specify whether the employee is to be paid for the break. For example, a reduction set might specify that regular breaks are paid, but not lunches.

5 Specify **Start Time** and **End Time** values. For unpaid breaks, jobs that occur during a reduction time will have the duration of the reduction deducted from the overall duration of the job. For clockable reductions, the start and end time mark the point of reference for clock-in rules associated with the reduction.

   The **Payroll Time Code** is not used in this version of Time Track.

6 Optionally, specify a **Task Code** value. If the reduction set time is redirected to an Indirect Task code, then specify the Indirect task code.

7 7. If **Clockable** is selected, the reduction is clockable and the employee is expected to clock out, lunch out, or break out at the specified start time of the reduction, and the employee is expected to clock in, lunch in, or break in at the end time of the reduction. The best practice is to configure clockable breaks as **Paid**. If the employee does not clock out for a break, then no reduction is made. Grace period, Tolerance and Adjustment rules are defined on the **Employee Types – Punch Parameter** tab. These parameters are applied to clockable reduction start and end times in a similar method as clock-in rules are applied to shift start and end times.

8 You can issue a prompt to the user when the employees have missed a clockable break by selecting the Confirm Break checkbox.

9 If **Exclude Absences** is selected, the duration of the reduction is deducted from the absence hours that occur during the defined times of the reduction. If **Exclude Absences** is cleared, no reduction absence hours occurs.

10 If the Active on Partial Day parameter is selected, the reductions are deducted or redirected from a running activity that occurs during the defined times of the reduction. If this parameter is cleared and a partial day absence is specified, then the reductions on a partially worked day are not deducted or redirected from a running activity that occurs during the defined times of the reduction. When a partial absence is not specified, then the reduction is made regardless of the parameter setting.

   Note:

   - **Exclude Absences** defines the reductions methods during the absence hours on partially worked days.
   - **Active On Partial Day** defines the reductions methods during clocked hours on partially worked days.

Configuring Shift Patterns

1 Open the Shift Patterns form.
2 Select a blank line or an existing shift pattern from the grid at the left, then specify this information:

   Shift Pattern
   Specify a shift pattern code.

   Description
   Specify a brief description for the shift pattern.

   Pattern Time Unit
   Specify the pattern interval. Available selections are **Daily**, **Weekly**, **Monthly**, and **Payroll Period**. **Weekly** patterns will transition from one leg to the next on Mondays, regardless of the day of the week the shifts within the pattern start on. The **Monthly** interval will transition to the next leg on the first of each month. The **Payroll Period** interval transitions at the beginning of each pay period.

   Facility
   Specify a facility, if applicable.

3 In the grid below the header, specify shift pattern definitions. Each line represents a shift in the sequence. A shift pattern might consist of a night shift, a morning shift, and an afternoon shift. Shifts will occur in the order you specify here.

   Select the first row. Sequence number 1 is assigned automatically. From the Shifts list, select the shift that will occur first in the shift pattern. Click **Colors** to specify a color format to denote this shift on the calendar. Specify a foreground (text) color and a background color and view the result in the **Sample** field. When finished, click **Save and Exit**.

   Note: If no available shift meets your needs, click **Shifts** to configure a new shift.

   Select the second row. Sequence number 2 is assigned automatically. From the Shifts list, select the shift that will occur second. Click **Colors** to specify a color format for this shift.

   Repeat this process until you have designated all shifts that will occur sequentially in the shift pattern.

4 Optionally, to view the shift sequence on the calendar, click **Shift Patterns Calendar**. This button is not available when **Payroll Period** is specified for the pattern interval.
5 Click **Generate Calendar** to initiate the shift pattern. This button is not available when **Payroll Period** is specified for the pattern interval. The shift pattern is generated automatically when **Payroll Period** is specified for the pattern interval.

Configuring Shifts

To configure shift parameters, use the Shifts form.

1 Open the Shifts form.
2 On the Shifts form, select a shift from the grid, then specify this information:

Active
Select to allow users to clock in using this shift.

Report Date Adjustment
This field pertains to shifts that start on one date and end on the following date. Specify **Previous Day** to report all clocked hours on the clock-in date. Specify **Current Day** to report all hours on the day they occur. Specify **Next Day** to report all clocked hours on the clock-out date.

Logical Midnight
Specify the time at which the report date changes from today's date to tomorrow's date. You can set the time when employees are not expected to clock in. This is typically 12 hours from the midpoint of a shift.

Logical Midnight Adjustment
This feature is not yet implemented. Select **Previous Day**.

Shift Type
Specify **Dynamic** or **Static**. Static shifts are fixed to the shift start and end times. Regardless of where the punches occur on the report date, the hours between Start and Stop must be accounted for with clocked hours or absence hours. Dynamic shifts do not require an absence to be created to account for unclocked time during the shift. For dynamic shifts, a supervisor's authorization is sufficient to account for any unclocked time during the shift.

Overtime Calculation Method
Specify **Weekly**, **Daily**, **Daily and Weekly**, or **California**. **Weekly** uses **Overtime Threshold** and **Double Time Threshold** to set the point when accumulated hours begin to categorize as overtime and accumulated OT hours begin to categorize as Double Time hours. **Daily** uses the hours specified on the **Authorized Hours** tab to define how many regular hours to book before booking overtime hours. **Daily and Weekly** uses authorized hours to determine daily hours categorizations, then uses the overtime threshold to determine how to categorize hours on non-working days. **California** compares the **Weekly** and **Daily** methods and uses the method that provides employee with the greatest amount of OT hours.

- **Overtime Threshold**: uses the Overtime Threshold and the Double Time Threshold to set the point when accumulated hours begins to categorize as overtime and OT hours as Double Time hours.
- **Double Time Threshold**: In this parameter you can specify the daily OT threshold to be used on the 7th Consecutive Day
- **Include All Worked Hours To OT Threshold**: This parameter is only displayed when California OT Method is selected. **N** is the default setting for this parameter. When set to **N** the daily count of clocked hours towards the weekly OT Threshold is limited to the setting for Regular Authorized hours.When set to **Y** all clocked hours count towards the Weekly OT Threshold
- **None OTE Hours To Weekly Threshold**: This parameter is only displayed when California OT Method is selected. **N** is default setting for this parameter. When set to **N** Non overtime eligible ABS hours is not counted towards daily or weekly OT Thresholds. When set to **Y** Non overtime eligible ABS hours is not counted towards daily OT Thresholds but it is counted towards the weekly OT threshold.
- **Count Daily Authorized Only**: This parameter is only displayed when California OT Method is selected. N is the default setting for this parameter. When set to **N** ABS hours in excess of the daily regular authorized hours may count towards the weekly OT Threshold. When set to **Y** ABS

hours in excess of the daily regular authorized hours limits the count towards the Weekly OT Threshold to the number of regular hours authorized for the day.

7th Day
To comply with California labor laws, specify how to calculate when a seventh consecutive day has been worked:For the purposes of calculating when seven consecutive work days have occurred, a work day is defined as a day that contains both a clock in and clock out record, regardless of the duration between them. This field selects and defines the features involved in 7 consecutive days

- **Shift Week**: The employees are considered to have worked for 7 consecutive days, if they worked on each day of the week.
- **Mon - Sun**: The employees are considered to have worked from Monday to Sunday, if they worked on each day of the week. The measurement period resets every Monday.
- **Sun - Sat**: The employees are considered to have worked from Monday to Sunday, if they worked on each day of the week. The measurement period resets every Sunday.
- **Rolling7**: A seventh consecutive day is calculated based on any series of seven consecutive days that meet the criteria of a work day.
- **None**: This feature is not active. The 7th consecutive day uses the Authorized Hours specified on the shift form.

Overtime Threshold
Specify the Weekly Overtime Threshold, for shifts using OT methods that contain a Weekly OT component (i.e., Weekly, Daily and Weekly, and California). The value is specified in the HHMM format. The value entered represents the threshold from which clocked hours and OT-eligible absence hours begins to categorize as overtime. A requirement of 40 regular hours before overtime is paid, and is expressed as 4000. This functionality does not impact shifts that are configured to pay **Daily OT** or daily component of blended OT methods such as **Daily** and **Weekly** or **California**
.

Note: The value specified as the OT threshold is used by the weekly components in the Weekly, Daily and Weekly and California OT Methods to determine the time from when the hours can be categorized as OT.

Double time Threshold
Specify the Double Time Threshold, which defines the point at which hours start to categorize as double time. The default value is 6000. The value you specify represents the total of Clocked Regular, Clocked OT, and OT Eligible absence hours is included in the count towards the Double Time threshold for the shift week. For a 40-hour regular work week and an additional requirement of 20 hours of overtime, the Double Time Threshold is expressed as 6000. This field functions differently when the California OT Method is selected. See the California section of this document.

Note:

- The field is applicable for Daily, Daily or Weekly or California OT Methods, only if **7**th day is set to a value other than None and this value represents the time from when the daily hours can be categorized as DT.
- The hours entered prior to the threshold value are categorized at OT. There are no Regular hours on the **7**th day.

3 Specify Labor Type codes for regular, overtime, and double time hours. When a Static shift is used, specify Labor Type codes for overtime and double time that occurs before the scheduled shift as well. These codes must match valid labor type codes used in the ERP.

To define the shift week, use the seven inline lists immediately above the **Core Times** and **Authorized Hours** tabs. Set the leftmost field to the day that represents the first day of the shift week. After you set the first day, the next six fields fill sequentially.

4 On the **Core Times** tab, specify the start time, end time, and reduction set for this shift on each day. Then, specify this information:

Work Code
Specify one of these codes:

- **Eligible for Overtime** : All hours mustl be categorized based on the OT Method selected for the shift.
- **Regular**: All hours clocked in this day will be categorized as regular.
- **Overtime**: All hours clocked on this day will be categorized as overtime.
- **Double Time**: All hours clocked on this day will be categorized as double time.

Day Type
Specify one of these types:

- **Working Day**: Regular clock-in rules and exceptions are applied.
- **Non-Work Day**: Clock-in rules are suspended and absence hours cannot be generated on a non-working day. Authorized hours for the shift day are still in effect, so exceptions may occur when clocked hours exceed authorized hours.
- **Not Allowed**: No clock-ins will be permitted on this day.

5 On the **Authorized Hours** tab, specify this information for each day:

Hours
Specify the total number of permissible **Regular**, **Overtime**, **Doubletime**, **Overtime Before Shift**, and **Doubletime Before Shift** hours. When hours on a shift day exceed authorized hours, an exception will be generated.

Premium Code
Specify shift premium codes as appropriate for each day. During the payroll process, premium hours will be added to hours that occur on shift days configured to pay a premium.

6 On the **Auto Clock Out** tab, in the **Auto Clock Out** field, select the time for the automatic clocking out of the employees. At the selected time the employee are clocked out using the scheduled shift end time as the transaction time:

- **None**: Employees will not be automatically clocked out.
- **At Midnight**: Employees will be automatically clocked out at midnight.
- **At Logical Midnight**: Employees will be clocked out at logical midnight.
- **After Shift**: Employees are clocked out at a specified time after the shift ends. If you select this value, in the **Hours After Shift(HHMM)** field, specify how much time must pass after the shift ends before employees are automatically clocked out.

7 Click **Save**.

Configuring Temporary Schedule Changes

Schedule changes are made on the Schedule Change form. A schedule change may consist of a move to a completely different shift, a change to the scheduled start or end time or a combination of both. For future schedule changes, the Hours Summary and Hours Detail forms display the temporary shift as the scheduled shift. Retroactive shift changes update the scheduled start and end times, then re-apply the clock in rules.

Note: If a retroactive change puts the punches in-line with the start and end times for the new shift, punches that were in exception may no longer be in exception.

The Schedule Change form is a linked form, and must be opened from either the Hours Summary form, where you can perform bulk or individual schedule changes, or the Hours Detail form, where you can perform individual schedule changes only. Additionally, temporary schedule changes for future dates may only be performed from the Hours Summary form, whereas retroactive schedule changes may be performed from either the Hours Summary form or the Hours Detail form.

Note: Shift changes may not be done while the employee is clocked in. They must either be performed for a date with no clock in, or for a date with both a clock in and clock out.

1 Open the Hours Summary form or the Hours Detail form.
2 On the Hours Summary form, populate the grid and select the record(s) for which you will be creating a temporary schedule change. On the Hours Detail form, select a single employee record.
3 Select the Schedule Change icon in the toolbar. The Schedule Change form opens.
   If you navigated from the Hours Summary form, the employee field does not display.
   If you navigated from the Hours Detail form, the employee number displays and is read-only.
4 Specify the shift to which the selected employee(s) will be temporarily moved.
5 Specify a new start and end time, if necessary.
6 Click **Submit**.

Configuring Work Groups

To configure work groups:

1 Open the Work Groups form.
2 Select a work group record from the grid at left, then specify a workgroup code and description for the work group.
3 Optionally, to remove an employee from the **Employees** tab, change the workgroup assignment in the employee's employee record. This tab fills with employee records as employees are assigned to the group in their employee record.

4 On the **Privileges** tab, assign authorization to the workgroup by entering a supervisor's username in the **User** field. A validation will run that returns the name associated with the username and the user's Time Track role. You can adjust privileges by selecting or clearing the activity check boxes at the bottom of the tab.

View Punch
Select this check box to allow the supervisor to view hours for employees in this work group. If cleared, the supervisor is not able to see the employee's hours in the Hours Summary or Detail forms.

Modify Punch
Select the check box to allow the supervisor to modify Hours Detail records.

Add Punch
Select the check box to allow the supervisor to add new punches on the Dashboard Transactions form.

Approve Punch
Select the check box to allow a supervisor to approve an employee's hours.

Process Punch
Select the check box to allow a supervisor to process an employee's hours.

Open Processed Punch
Select the check box to allow the supervisor to reopen hours that have been processed.

Delete Punch
Select the check box to delete labor records on the Hours Detail form.

Report Quantities
Select the check box to allow the supervisor to report quantities for the employee on the Dashboard Transaction form.

Create Planned Absence
Select the check box to allow the supervisor to create absence hours for employees.

Approve Absence Requests
Select the check box to allow the supervisor to approve or deny an employee's absence requests. When this is selected supervisor profiles that have email addresses must receive email notification of the request.

Enter Temporary Shift Change
Select the check box to allow the supervisor to enter temporary shift changes for employees.

Receive Disciplinary Notice
When the Attendance Points System is on and set to generate notices, select this check box for the supervisor to receive disciplinary notices.

Process Disciplinary Notice
When the Attendance Points System is on and processing notices is required, select this check box to allow the supervisor to process disciplinary notices.

View Payroll
Select the check box to give the supervisor or administrator access to view the employee's payroll hours.

Process Payroll
Select the check box to allow the supervisor or administrator to process the employee’s payroll.

Modify Payroll
Select the check box to allow the supervisor or administrator to enter payroll adjustments to the employee’s payroll hours.

Generate Payroll Extract
Select the check box to allow the supervisor or administrator to create a payroll extract for the employee’s payroll hours.

Reopen Payroll
Select the check box to allow the supervisor or administrator to reopen hours that are extracted. Required in order to make adjustments to payroll hours after extraction is performed.

Restore Payroll to Submitted
This parameter is only relevant if the Allow Revert Processed Payroll parameter is selected on the Site Parameter form. If Restore Payroll to Submitted is selected, the user is allowed to revert processed payroll records back to submitted status. This unlocks the record so that it may be reopened and edited on the Hours forms.

Note: If this Work Group privilege is cleared, the user is not able to revert Processed Payroll to Submitted status.

Loading Orders from the ERP System

Use theLoad Orders from ERP form to download orders from the ERP system into Time Track. You can download orders manually or configure them to be automatically downloaded as a background task.

See Scheduling Background Tasks for more information about configuring automatic downloads.

To download orders from the ERP system manually:

1 Open the Load Orders from ERP form. The site is displayed.
2 Specify this information:

   Days Prior
   Specify the number of days before the current date for which to download orders.

   Days Into the Future
   Specify the number of days after the current date for which to download orders.

   Send Email Notification
   Select this option to send an email indicating the number of successfully downloaded orders to the email address specified on your user profile.

3 In the Order Type section, select the order types to download.
4 Click **Process**. The number of successfully downloaded orders is displayed.

Using the Elapsed Time Daily Summary Form

Use the Elapsed Time Daily Summary form to view and work with elapsed time hours records.

See "Viewing Records Using the Elapsed Time Daily Summary Form".

See "Working with Records Using the Elapsed Time Daily Summary Form".

Using the Elapsed Time Details Form

Use the Elapsed Time Details form to view, create, and edit elapsed time hours records.

See "Viewing Records Using the Elapsed Time Details Form".

See "Creating Records Using the Elapsed Time Details Form".

See "Editing Records Using the Elapsed Time Details Form".

Using the Elapsed Time Weekly Summary Form

Use the Elapsed Time Weekly Summary form to view and work with elapsed time hours records.

See "Viewing Records Using the Elapsed Time Weekly Summary Form".

See "Working with Records Using the Elapsed Time Weekly Summary Form".

Using the Hours Detail Form

Use the Hours Detail form to view and edit hours records.

See "Viewing Records Using the Hours Detail Form".

See "Editing Transactions Using the Hours Detail Form".

Using the Machine Time Details Form

Use the Machine Time Details form to view hours records for machines.

1 Open the Machine Time Details form.

2 Specify selection criteria. Initially, no default preferences are set. You can configure a preferred combination of selection criteria, then click **Save Selections** to save these criteria as the default. Alternative selections can be saved under other names and retrieved using **Restore Selections**. Use these parameters to define selection criteria:

- **Date Preference**: This field sets the date range for the selection. The most common preferences are **Show Today's Records**, **Show Yesterday's Records**, **Show Records for Yesterday and Today**, **Work Week**, and **Date Range**. All of these preferences will automatically update each time the form is opened, except the date range preference. The date range preference will be the same each time the form is opened.
- **Report Date**: The starting and ending values are automatically specified based on your **Date Preference** selection. You can adjust these manually, or use the **Date Preference** arrows to show the previous or subsequent reporting period.
- **From - To Ranges**: You can specify a range of employees, shifts, and/or orders. Leave a field blank to show all available records of that type.
- **Filters**: This set of options allows you to include or exclude a record based on its status or type.

Records that match your specified selection criteria are displayed in the bottom grid.

Using the Hours Summary Form

Use the Hours Summary form to view and work with hours records.

See "Viewing Records Using the Hours Summary Form".

See "Working with Records Using the Hours Summary Form".

Printing Daily Summary Reports

Use the Daily Summary Report form to print daily summary reports.

1 Open the Daily Summary Reports form.

2 To define which records to include in the report, define filter criteria. Optionally, leave the filter criteria blank to include all records. To define filter criteria, specify starting and ending values for these fields:

Report Date
Specify the record dates.

Employee
Specify the employee numbers associated with the records.

Employee Type
Specify the employee types associated with the records.

Work Group
Specify the work groups associated with the records.

Department
Specify the departments associated with the records.

3 Optionally, to preview the report, click **Preview**.
4 To print the report, click **Print**.

Printing Employee Reports

Use the Employee Report form to print time and attendance reports for employees.

1 Open the Employee Report form.
2 In the **Employee** fields, specify a range of employees to include in the report. Leave blank to include all employees.
3 Optionally, to preview the report, click **Preview**.
4 To print the report, click **Print**.