Infor Factory Track for SyteLine Time Track User Guide

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Contents

Infor Time Track Module

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

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 17.

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 SL 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, see "Setting Up Absence Tracking".

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 48 for more information about configuring employees to use elapsed time.

See "Recording and Processing Elapsed Time".

Using Toolbar Buttons

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

Save Selections

Click **Save Selections** to name and save a set of selection criteria.

Restore Selections

Click **Restore Selections** to load a previously-saved set of selection criteria.

Authorize Exceptions

Select one or more records, then click **Authorize Exceptions** to authorize all exceptions and revalidate the selected records. Authorized status may be cleared by selecting a record, then clicking the **Reopen** icon.

Gap Fill

Click **Gap Fill** to insert the Gap Fill task (defined in the Employee Type) into any unassigned durations during the selected shift record.

Remove Gaps

Click **Remove Gaps** to delete any Gap Fill tasks that have been generated for the selected shift record.

Generate Absence

Click **Generate Absence** to insert a full-shift default absence on any selected shift record.

Select All

Click **Select All** to select all displayed records.

Deselect All

Click **Deselect All** to deselect all displayed records.

Approve

Click **Approve** to endorse the employee record. This is the first step of the two-step sign-off procedure. Approved records can still be edited.

Process

Click **Process** to lock in the approved record. This is the second step of the two-step sign-off procedure. Processed records cannot be edited unless you reopen them.

Approve and Process

Click **Approve And Process** to approve and process the record in a single step. Processed records cannot be edited unless you reopen them.

Reopen

Click **Reopen** to return a processed record to open (editable) status, or to clear authorizations for an open record. Records that have already been payroll processed cannot be reopened. For kiosk users, this button reverses the approval, but does not reopen the record. Kiosk users cannot edit processed records.

Schedule Change

Click **Schedule Change** to configure temporary schedule changes, in which employees clock in and out at different times from their normally-scheduled shifts.

Shifts

Click **Shifts** to configure shift parameters, such as description, shift types, core hours, and shift premiums.

Planned Absence

Click **Planned Absence** to create an absence for today's shift for each selected record.

Holiday Calendar

Click **Holiday Calendar** to view scheduled holidays for the current facility.

Absence Calendar

Click **Absence Calendar** to display planned absences for the selected employee for a tracking year.

ABS Summary Balance

Click **ABS Summary Balance** to display absence tracking record for the selected employee for a tracking year.

Teams

Click **Teams** to display the detailed level information for the specified team that includes the current job and employees working in the team.

Transactions

Click **Transactions** to open the Dashboard Transactions form, where you can clock in, clock out, start a job or task, report quantities completed, and record absences.

Payroll Summary

Click **Payroll Summary** to open the Payroll Summary form, where you can view hourly records and perform administrative functions for a specified payroll schedule.

Employees

Click **Employees** to open the Employees form, where you can configure employee account information. Select an employee in the Hours Detail form before clicking **Employees** to access information for that employee.

Save

Click **Save** to save any edited records.

Delete

Click **Delete** to delete a record. Job records without reported quantities, indirect task records, and absence records can be deleted, while clock-in records, clock-out records, and jobs with reported quantities cannot.

Correct Errors (Hours Detail form)

Click **Correct Errors** to account for excess clocked hours.

Dynamic Shifts

If clocked hours are more than scheduled, click **Correct Errors** to adjust Start and End times to the scheduled values.

Static Shifts

If clocked hours exceed authorized overtime for the shift, click **Correct Errors** to adjust start and end times to the threshold of authorized overtime.

Select a detail record to apply error correction to that detail only; for example, to adjust a lunch break punch in/out without adjusting the punch in/out for the entire shift.

Clear Error Messages (Hours Detail form)

Click **Clear Error Messages** to clear error messages from the dashboard.

Calculate Premium (Payroll Details & Payroll Summary form)

Click **Calculate Premium** to display 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.

Payroll Process (Payroll Details &Payroll Summary form)

Click **Payroll Process** to lock records, calculate premiums, and update status for all selected records to Payroll Processed.

Hours Summary

Click **Hours Summary** to open the hour summary form for the respective payroll summary form.

Hours Detail

Click **Hours Detail** to open the hours detail form for the respective payroll detail form.

Payroll Details

Click **Payroll Details** to open the payroll details form for the respective payroll detail form.

Restore Payroll to Submitted

If the **Allow Revert Processed Payroll** check box is selected in the Site Parms form titled, Payroll is allowed to revert from Payroll processed to Submitted status and the icon is enabled in both the Payroll Summary and Payroll Detail forms.

Note: The user has access to the employee’s work group if the **Restore Payroll to Submitted privilege** set to Yes.

TimeSheet Summary

Click **TimeSheet Summary** to open the TimeSheet Summary form for the respective payroll summary form.

Supervisor Time Off Request Disposition

Click **Supervisor Time Off Request Disposition** to open 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.

Incident Forgiveness

Click **Incident Forgiveness** to set the incident to forgive status. This is performed by the supervisor.

Post To ERP

Click **Post To ERP** to post the records selected to the selected ERPs.

TimeSheet Detail

Click **TimeSheet Detail** to open the TimeSheet Detail form for the respective payroll detail form.

Revert Complete

Click **Revert Complete** to revert and complete the punches performed by the employee on the Hours Detail form.

Machine Time Details

Click **Machine Time Details** to display the machine hour detail for an employee for a particular job operation from the Hours Detail form.

Get Favorite Job

Click **Get Favorite Job** to assign the favorite job to the employee.

Set Favorite Job

Click **Set Favorite Job** to set the job assigned to the employee as the favorite job.

Export (Payroll Summary and Payroll Details form)

Click **Export** to create a CSV file for export to a payroll application. The extract will be saved to the output location you define on the Facilities form.

Reopen Payroll (Payroll Summary and Detail forms)

Click **Reopen Payroll** to reopen an extracted record. You can then edit, save, and re-extract the record.

Transaction processing

2

This chapter describes the transactions processes related to time track of Factory Track SL.

Using Time Track on a Mobile Scanner

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" on page 19and "Clocking Out" on page 20 for instructions on using this transaction.

Break In/Out

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

See "Clocking In from a Break" on page 21and "Clocking Out for a Break" on page 21 for instructions on using this transaction.

Lunch In/Out

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

See "Clocking In from Lunch" on page 22and "Clocking Out for Lunch" on page 22 for instructions on using this transaction.

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" on page 23for instructions on using this transaction.

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" on page 30 and "Stopping Jobs" on page 35for instructions on using this transaction.

Clocking In

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

See "Clocking In Using theEmployee Home Page Form" on page 19 and "Clocking In Using the Dashboard Transactions Form" on page 19.

If you have the Shop Floor module implemented, you can also clock in using the Work Center Navigation Home Form.

See Using the Work Center Navigation Home 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" on page 17.

Clocking In Using the Employee Home Page Form

1 On the Employee Home Page form, select **Attendance Transactions**.
2 Specify your employee or badge number.
3 Select **Clock In**. Optionally, to clock back in from a break or lunch, select **From Break** or **From Lunch**.

Clocking In Using the Dashboard Transactions Form

1 Specify your employee or badge number.
2 Verify that the transaction date and time are correct.
3 Click **Clock In**.

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 Employee Home Page form or using the Dashboard Transactions form.

See "Clocking Out Using the Employee Home Page Form" on page 20 and "Clocking Out Using the Dashboard Transactions Form" on page 20.

If you have the Shop Floor module implemented, you can also clock out using the Work Center Navigation Home Form.

See Using the Work Center Navigation Home 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" on page 17.

Clocking Out Using the Employee Home Page Form

1 On the Employee Home Page form, select Attendance Transactions.
2 Specify your employee number.
3 Select **Clock Out**. Optionally, to clock out for a break or lunch, select **To Break** or **To Lunch**.

Clocking Out Using the Dashboard Transactions Form

1 Specify your employee number.
2 Verify that the transaction date and time are correct.
3 Click **Clock Out**.

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.

1 On the Main Menu, select the **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 date time when the edit date time parameter on the User Extensions form is checked.

Employee
Scan your employee ID number.

4 Select **Submit**.

Break In/Out

When Time Track or Infor Cloud Suite Industrial Time and Attendance are implemented, 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.

1 On the Main Menu, select the **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

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

1 On the Main Menu, select the **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. YThe 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**.

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

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**.

Viewing Timesheets

1. On the Employee Home Page form, select **View Timesheets**.
2. Specify your employee number.
3. Specify a date range for which 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 Optionally, select **Left** to show the timesheet of the past week, or select **Right** to show the timesheet of the next week.

5 Optionally, to print the currently displayed records, select **Print Timesheet** .

6 Optionally, to view additional hours details for the selected date range, click or tap **Detail**.

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**.

Using the Dashboard Transactions Form

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:

- **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 can begin
- **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 also can perform these transactions using a remote device, such as a scanner.

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".

Starting Jobs Using Time Track

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

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

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:

- **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 can begin
- **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 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 30 for instructions on using the Job Booking transaction.

You can start jobs using these methods:

- Start a job for a non-workset-eligible employee using the Employee Home Page form

See "Starting Jobs for Non-Workset-Eligible Employees Using the Employee Home Page Form" on page 26.

- Start a job for a machine using the Employee Home Page form.

See "Starting Jobs for Machines Using the Employee Home Page Form" on page 27.

- Start a workset for a workset-eligible employee using the Employee Home Page form.

See "Starting Workset for Workset-Eligible Employees Using the Employee Home Page Form" on page 27.

- Starting a job for a non-workset-eligible employee or machine using the Dashboard Transactions form.

See "Starting Jobs for Non-Workset-Eligible Employees or Machines Using the Dashboard Transactions Form" on page 29.

- Starting a job for a workset-eligible employee using the Dashboard Transactions form.

See "Starting Jobs for Workset-Eligible Employees Using the Dashboard Transactions Form" on page 29.

Starting Jobs for Non-Workset-Eligible Employees Using the Employee Home Page Form

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

1 On the Employee Home Page form, select **Real Time Transaction Entry**.

2 In the **Badge** field, specify your employee or team number.
3 Select the order type.
4 If the order type is **Production Order**, **Service Order** , or **Setup** specify the order number, suffix, and operation.
5 If applicable, specify a machine ratio. 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.
6 If the order type is **Indirect Task**, specify the task code.
7 If the order type is **Project** , specify the project number, task number, and cost code.
8 Select **Start Job**. The details of the current job are displayed on the **Detail** tab.

Starting Jobs for Machines Using the Employee Home Page Form

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

1 On the Employee Home Page form, select **Machine Time**.
2 Specify the order number, suffix, and operation.
3 Select **Start Job**. The details of the current job are displayed on the **Detail** tab.

Starting Worksets for Workset-Eligible Employees Using the Employee Home Page Form

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

1 On the Employee Home Page form, select **Real Time Transaction Entry**.
2 In the **Badge** field, specify your employee or team number.
3 Select the order type.
4 If the order type is **Production Order**, **Service Order**, or **Setup** , specify the order number, suffix, and operation.
5 If applicable, specify a machine ratio. 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. The machine ratio is applied to the prorated duration of each job when multiple jobs are running simultaneously.
6 If the order type is **Indirect Task**, specify the task code.
7 If the order type is **Project** , specify the project number, task number, and cost code.
8 Select the job from the active workset. This job is considered as the current job.
9 For a verified employee who is a single booker for the running job, job information is displayed along with the **Stop-Start** Icon, **Start** Icon and **Stop** Icon.

- If the employee number is not verified for the running job, the **Stop-Start** Icon is not displayed.

- The quantity information specified for the employee is saved and posted when the Stop-Start is executed. However, if no information is specified, the employee can select the **Stop-Start** icon.

a The running job information is saved temporarily and a new entry screen is displayed with defaulted information for the employee number, employee name, transaction date, transaction time and the employee's default order type. The user can enter the start job information and select **Stop-Start**.

b The date and time of the Stop-Start process is used as the stop time of the prior transaction and the start time of the new transaction.

c If **back** is selected the prior screen displays the restored data entered previously.

10 For a verified Workset employee, the running workset information is displayed along with **Stop-Start** icon.

Note:

- The user can add additional jobs or remove jobs to the running workset. The running workset, can also be stopped or can Complete All and stop the workset.
- On the **Adding** tab user can view the jobs of the current workset. User can use the tab to initiate the **Stop-Start** icon.

a Select **Stop-Start** Icon to view the Stop-Start form with the information such as; the employee number, employee name, transaction date, transaction time and the employee's default order type.

b The Order Entry fields is reset to enter the new order information. To load the next workset the employee enters Order Type, Ord# and Op. The normal order validation runs and returns the standard data fields.

c Select the **New Workset Add** to load the entered order.

d Adding the first job creates the next Workset header and loads the job to that header.

e Select **Stop-Start** icon to stop the running workset and start the next workset.

Note:

- If the employee hits back before starting the loaded workset the loaded records persists as loaded but not as started records.
- If the employee hits back or exits the form on a next workset that has no records in it the next workset header is deleted.

f Select record checkbox on the **Workset**tab and on the **Adding** tab during workset loading, to remove a job prior to starting the workset.

g To remove a job from a workset, the user selects the check mark on the job to remove and then select remove job. This feature is enabled in the RealTimeTransactionEntry.ts Start form and the Stop Start forms.

h User can clear the **Order Type** field on the Realtime Transaction Entry.TS form, to select add job to workset. The value of the previously defaulted/entered order type must persist.

11 Select **Add to Workset** to populate the **Workset** tab with the job details.

12 Repeat steps 3 through 8 until all jobs in the workset have been added.

13 Select **Start Workset**. The details of the current job are displayed on the **Detail** tab.

Starting Jobs for Non-Workset-Eligible Employees or Machines Using the Dashboard Transactions Form

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

1. Open the Dashboard Transactions form.
2. If you are starting a **Machine** job manually, select **Machine** in the Transaction Mode field. Otherwise, leave this field set to **Hours** .
3. Select the order type.
4. If the order type is **Production Order**, **Service Order** , **Setup**, or **Machine** specify the order number, suffix, and operation.
5. If applicable, specify a machine ratio. 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.
6. In the **Next Operation** field user can specify the next operation number.

   Note:

   - However, if the **Out Of Sequence** is cleared in the Employee Types Form, the **Next Operation** field displays the next operation in sequence. The fields is read only
   - If the **Out Of Sequence** is selected in the Employee Types Form, the next sequential operation is defaulted in but the user can enter one of the available operations number from the list of the **Next Operation** field (an open operation in the job's routing).

     After entering an out of sequence operation a validation is performed to confirm that the operation is still open(only open operations are listed in the **Next Op** pulldown). If the selected operation is marked complete, user cannot move qunatities to that operation. A message that indicates the selected operation is complete is displayed. When the message is cleared, application restores the default Next Operation value.

7. If the order type is **Indirect Task**, specify the task code.
8. If the order type is **Project** , specify the project number, task number, and cost code.
9. Click **Start Job**. The Current Job group box displays the details of the current job.

Starting Worksets for Workset-Eligible Employees Using the Dashboard Transactions Form

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

1. Open the Dashboard Transactions form.
2. Select the order type.
3. If the order type is **Production Order** , **Service Order** , or **Setup** , specify the order number, suffix, and operation.

4 If applicable, specify a machine ratio. 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. The machine ratio is applied to the prorated duration of each job when multiple jobs are running simultaneously.
5 If the order type is **Indirect Task**, specify the task code.
6 If the order type is **Project** , specify the project number, task number, and cost code.
7 Click **Add Job to Workset** to populate the grid with the job details.
8 Repeat steps 2 through 6 until all jobs in the workset have been added.
9 Click **Start Workset**. The Current Job group box displays.
10 Specify a job from the active workset to be the current job.

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:

- production orders

See "Starting Production Orders and Setup Activities" on page 32.

- setup activities

See "Starting Production Orders and Setup Activities" on page 32.

- indirect tasks

See "Starting Indirect Tasks" on page 31.

- projects

See "Starting Projects" on page 32.

- machine jobs

See "Starting Machine Jobs" on page 31.

- service orders

See "Starting Service Orders" on page 33.

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 Labor Reporting transaction to start jobs. See Starting Jobs Using Warehouse Mobility for instructions on using the Labor Reporting transaction.

Starting Indirect Tasks

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

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.

- In the **Type** field, select **Indirect**.
- In the **Task** field, select a task code.
- 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.
4 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. Select **Machine Time Mode**.
5 Specify or review this information:

   Order Number
   Scan an order number.

   Suffix
   Select a job suffix 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. Tap **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.
4. 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.
   - In the **Order Type** field, select **Production Order** or **Setup**.
   - Specify or review this information:

     Order Number
     Scan an order number.

     Suffix
     Select a job suffix number.

     Operation
     Select an operation number.

     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.

5. Select **Submit**. The order or setup activity is started or added to your workset.

   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.
5 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. In the **Type** field, select **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.
4 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 **Employee** field, scan your employee ID number or team number.
6 In the **Type** field, select **Service Order**.
7 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.

8 Select **Process**.

Stopping Jobs

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

See "Stopping Jobs or Worksets Using the Dashboard Transactions Form" on page 35.

See "Stopping Jobs or Worksets Using the Employee Home Page Form" on page 27.

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

Stopping Jobs or Worksets Using the Employee Home Page Form

To stop a job for an employee:

1 On the Employee Home Page form, select **Real Time Transaction Entry**.
2 In the **Badge** field, specify your employee number. The current job is displayed on the **Detail** tab.
3 If applicable, specify the completed quantity, moved quantity, rejected quantity, and the reason code for any rejections.
4 If applicable, select **Complete Operation** to complete the current operation. No additional quantities can be completed or rejected for an operation once it is completed.
5 If applicable, select **Complete All** to complete the current job. No additional quantities can be completed or rejected for a job once it is completed.
6 Select **Stop Job** .

To stop a job for a machine:

1 On the Employee Home Page form, select **Machine Time**.
2 Specify the order number, suffix, and operation.
3 If applicable, specify the completed quantity, moved quantity, rejected quantity, and the reason code for any rejections.
4 If applicable, select **Complete Operation** to complete the current operation. No additional quantities can be completed or rejected for an operation once it is completed.
5 Select **Stop Job** .

To stop a workset:

1 On the Employee Home Page form, select **Real Time Transaction Entry**.
2 In the **Badge** field, specify your employee number. The current job is displayed on the **Detail** tab.
3 If applicable, specify the completed quantity, rejected quantity, and the reason code for any rejections.
4 If applicable, select **Complete Operation** to complete the current operation. No additional quantities can be completed or rejected for an operation once it is completed.
5 If applicable, select **Complete All** to complete the current job. No additional quantities can be completed or rejected for a job once it is completed.
6 Select **Remove From Workset**.
7 Select **Stop Workset**.

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

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:

- production orders

See "Stopping Production Orders" on page 37.

- setup activities

See "Stopping Setup Activities" on page 40.

- indirect tasks

See "Stopping Indirect Tasks" on page 36.

- projects

See "Stopping Projects" on page 39.

- machine jobs

See "Stopping Machine Jobs" on page 36.

- service orders

See "Stopping Service Orders" on page 39.

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 Labor Reporting transaction to stop jobs. See Stopping Jobs Using Warehouse Mobility for instructions on using the Labor Reporting transaction.

Stopping Indirect Tasks

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:
   - shift
   - job type
   - task code
4. 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**.
3. Select **Machine Time Mode** .
4. Scan an order number. This information is displayed:
   - order type
   - order number
   - job suffix
   - operation
   - task code
   - required quantity

5 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.
6 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.

7 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
   - job suffix
   - 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
4. 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 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**.

Stopping 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. This information is displayed:
   - order type
   - order number
   - job suffix
   - operation

   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 **Submit**.

Adding Team Members

Use the Teams form to add employees to teams using Time Track.

To add employees to teams using the Shop Floor module in Infor Factory Track, see Adding Team Members Using Shop Floor.

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

Use the Teams form to remove employees from teams using Time Track.

To remove employees from teams using the Shop Floor module in Infor Factory Track, see Removing Team Members Using Shop Floor.

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.

Creating Teams

You can use teams to streamline employee labor activities. Using teams jobs may be started or stopped for all team members in a single transaction. In the Time Track module, use the Teams form to configure teams and to add employees to the same teams.

To create teams using the Shop Floor module in Infor Factory Track, see Creating Teams Using Shop Floor. If you have both the Shop Floor and Time Track modules implemented, you must use the Team Maintenance form in Shop Floor to create teams. Teams created using Time Track are not compatible with Shop Floor.

1. Open the Teams form.
2. Specify this information:

   Team
   Specify a team number.

   Description
   Optionally, specify a description for the team.

   Badge ID
   Optionally, specify a badge ID for the team.

   Active
   Select to allow the team to start and stop jobs and to allow employees to join or leave the team.

   Workset Enabled
   Select to allow the team to work on worksets, which include multiple jobs. Clear to only allow the team to work on one job at a time.

   Labor Proration
   Specify the method used to prorate the Team time.

   Note: Before you specify this method, you must select the **Workset Enabled** check box.

   Machine Proration
   Specify the method used to prorate the Team time.

Note: Before you specify this method, you must select the **Workset Enabled** check box.

Remove Member At Clock Out
Select to remove employees from the team when they clock out.

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

Stop Only Transaction
Select to only require jobs to be stopped. When a job is stopped, a job start transaction will automatically be generated to occur immediately following the most recent transaction. For example, if you clock in at 8:00 and stop job ABC at 9:00, a start job transaction for job ABC will be generated at 8:00. Then, if you stop job XYZ at 11:00, a start job transaction for job XYZ will be generated at 9:00. Clocking out will automatically stop 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.

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

Configuring Time Off Groups

1 Open the Time Off Group Parameters form.
2 Specify this information:

Time Off Group ID
Specify a name for the time off group.

Description
Specify a description.

3 In the lower grid, click **Add Record** to add absence codes for this time off group. For each added absence code, specify or review this information:

Absence Code
Specify the absence code.

Annual Hours Allowed
Specify the number of absence hours that can be accrued in a year.

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.

Validation Type
Specify **Warning** or **Error**.

Allow Carry Forward
This field is read only and indicates whether unused hours can be carried into the next year.

Maximum Carry Forward
The maximum number of hours that can be carried into 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**.

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.

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**.

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.

1 Open the Compute Time Off Accruals form.
2 Specify this information:

Process Through
Specify the date though which to calculate time off accruals. Time off accruals will be calculated for all dates from the tracking year start date, usually January 1, through this date.

Increment Date
This parameter is only used when this form is run in the background to calculate the accruals automatically. Select this check box to increment the **Process Through** date as time passes. If this check box is cleared, the **Process Through** date entered is used as continual time , for the background task was created.

Recompute Accruals
Select the check box to recompute existing accruals. Unchecked to add new calculations to the existing accruals.

Facility
Specify the first and last facilities in the range for which you are calculating accruals. Optionally, leave blank to calculate accruals for all facilities.

Employee
Specify the first and last employees in the range for which you are calculating accruals. Optionally, leave blank to calculate accruals for all employees.

Time Off Group Id
Specify the range of Time Off Group IDs for calculating the accruals. This field is optional. When you do not specifiy the value, accrurals are calculated for all the group IDs.

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.

Requesting Time Off

You can request time off using the Employee Home Page form or using the Employee Time Off Request form.

See "Requesting Time Off Using the Employee Home Page Form" on page 45.

See"Requesting Time Off Using the Employee Time Off Request Form" on page 46.

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**.

Requesting Time Off Using the Employee Time Off Request Form

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.

Approving and Processing Labor Records

All 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 will be generated when the labor records are approved and processed.

1 Open the Hours Summary form.
2 To display labor records for approval and processing, specify selection criteria using these parameters:
    - Records that match your specified selection criteria are displayed in the bottom grid.
    - To only display records that are ready for approval and processing, select the **Ready** filter. Ensure all other filters are cleared.

    Note: Records with a blank status field have the **Ready** status.

3 Optionally, to determine whether records have already been approved for processing, click the **Status** button. If the **Approved By** or **Processed By** fields of the record are blank, the record has not been approved or processed, respectively.
4 Select the check box to the left of each record you are approving and processing. Optionally, click the **Select All** button to select all records.
5 Click **Approve and Process** in the toolbar. The records are approved and processed.

Configuring Department Parameters

To specify 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 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 will 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 Payroll Schedule value is the only link between operations and payroll activities in Time Track.

4 On the **General** tab, specify this information:

Default ABS Code
Specify a default employee absence code. When you click the **Generate Absence** or **Clear Error Messages** in the toolbar, 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. Right-click 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, hours in the Hours Summary and Detail will 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 will only be displayed 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 will be generated to occur immediately following the most recent transaction. For example, if you clock in at 8:00 and stop job ABC at 9:00, a start job transaction for job ABC will be generated at 8:00. Then, if you stop job XYZ at 11:00, a start job transaction for job XYZ will be 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 report machine time manually.

Use Attendance Point System Parameter
This field is used to activate the parameters for configuring the Attendance Point System. The point values are assigned to both the absence codes and work rule violations. The **Tracks** that are created can be to define thresholds at which the supervisor must take corrective action. There is also a provision to create multiple **Tracks** to monitor the 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 and 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, the attendance is posted on the required ERP.

The Elapsed Time Configuration fields are only displayed if **Elapsed Time Data Capture** is selected. If **Elapsed Time Data Capture** is selected, specify this information:

Process Method
Select **Daily** or **Weekly** to define whether records are approved and processed for each day or for each week. If **Daily** is selected, each report date must be individually approved and processed. If **Weekly** is selected, the records for an entire week are approved and processed simultaneously.

Manual Hours Categorization
Select to manually categorize hours as regular time, overtime, or double time. Clear to automatically categorize hours according to the parameters defined for the employee type and shift.

Allow Alternate Hours Type
This field is only displayed if **Manual Hours Categorization** is selected. Select to allow hours that would normally be categorized as overtime hours to be categorized as alternate hours, which are not eligible for overtime.

Submit and Sign Off Separately
Select this option to require employees to approve records before they can be approved and processed by a supervisor.

Collect Attendance Hours
Select this option to allow elapsed time employees to clock in and out.

Require Attendance Hours Match Labor Hours to Process
This field is only displayed if **Collect Attendance Hours** is selected. Select this option to require attendance hours to match labor hours before records can be processed.

Allowed Variance
This field is only displayed if **Require Attendance Hours Match Labor Hours to Process** is selected. Optionally, specify a variance percentage within which attendance hours and labor hours will automatically be adjusted to match. The earlier hours type will always be increased to match the later one in these cases. If the labor hours are increased, a gap fill record will be created to account for the increased time.

Submit 40 Hour Work Week to Payroll
Select to always report 40 hours of regular time to payroll each week, regardless of how many attendance or labor hours are recorded. Absence hours will be subtracted automatically from the hours reported to payroll.

Restrict Employee to Current Day/Week
Select to only allow employees to enter records on the current day or week, depending on the selected process method.

5 On the **Punch Parameters** tab, specify this information:

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.

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.

Authorize OT Required
Select to put Hours Summary records containing OT hours into Exception status.

Overtime Threshold
Specify the overtime threshold, which is used for shifts that are set to the **Weekly OT** method. The value is specified as HHMM. The value entered represents the threshold at which clocked hours plus OT-eligible absence hours begin to categorize as overtime instead of regular hours. A requirement of 40 regular hours before overtime is paid would be expressed as 4000. This field has no bearing on shifts that are configured to pay daily overtime.

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, OT, and OT Eligible absence hours for the shift week. For a 40-hour regular work week plus a requirement of 20 hours of overtime, the **Double Time Threshold** would be expressed as 6000. This field has no bearing on shifts that are configured to pay **Daily OT** or **Daily and Weekly OT** .

Specify alternate workcodes and hours authorizations for when a complete week is not met. The workcodes specified in this form are applied to the hours clocked on the sixth and seventh shift days when complete week requirements are not met. There are two sets of parameters, one for the Weekly OT method and the other for the Daily and Weekly OT method. Complete week requirements do not apply to the Daily OT method. For the Weekly OT method, specify this information:

Complete Week Required For
If there is no requirement for 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** .

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

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

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 sixth and seventh days. However, if a complete week is not met, the sixth and seventh days use standard thresholds or thresholds that are higher than a regular shift day. The Complete Week Not Met fields define the daily thresholds for the sixth and seventh days when a complete week has not been worked. If the shift using the Daily and Weekly OT method is a dynamic shift, thresholds are defined for regular time, overtime, and double time. If the shift is static, overtime and double time thresholds apply to durations worked after the scheduled end time. The OT Before and DT Before fields apply to thresholds worked before the scheduled shift start. For the Daily and Weekly OT method, specify this information:

Complete Week Not Met for Reg
Specify the number of regular hours to be worked 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 that can be worked after the regular time threshold is met, if a complete week is not worked.

Complete Week Not Met for DT
Specify the number of double time hours that can be worked after the overtime threshold is met, if a complete week is not worked. If the hours worked exceed this threshold, they are still categorized as double time hours but are put into Exception status.

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 regular hours to authorize using the HHMM format.

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 regular hours to authorize using the HHMM format.

In the Rounding Parameters section, specify this information:

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 Matrix will round per the other parameters defined in the Punch Rounding section. If you specify Attendance and Labor, in/out transactions and job starts that occur outside of the times defined in the Grace Matrix will round.

Punch Rounding Intervals
Specify the rounding increment for punches and decide the granularity of timekeeping. 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.

Specify values for **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.

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 specified grace period. Consider an example in which a shift begins at 8:00 with a grace period of 5 minutes and an **Adjust Forward**

Clocks Ins After Grace value of 15. If an employee clocks in at 8:08, Time Track adjusts the clock-in to 8:15.

Specify a value for **Adjust Forward Clock Ins After Grace**. A clock-in after grace may be adjusted forward by specifying an offset to the Scheduled Start time. With a clock-in grace of 5 minutes and **Adjust Forward Clock Ins After Grace** set to 15 minutes, any clock-in between 6 and 14 minutes after the scheduled start will adjust to 15 minutes after the start. This parameter is considered a clock-in rule and takes precedent over any rounding rules. Rounding rules take effect on any punches that occur after the **Adjust Forward Clock Ins After Grace** offset. Suppose you have a 15 minute round forward rule and a 10 minute rounding interval with an interval division of 6. If an employee clocks in 17 minutes late, then the time will be rounded down to the threshold of the late-in round forward rule.

Specify a value for **Adjust Backward Clock Outs Before Grace**. This is the opposite of **Adjust Forward Clock Ins After Grace**. This value entered is an offset to the scheduled end time. If a clock-out occurs that is within the limits of the offset and greater than the early-out grace period, the punch will be adjusted to the offset you specify here.

Specify a value for **Adjust Forward Lunch/Break Ins After Grace**. This field functions like **Adjust Forward Clock Ins After Grace**, but governs adjustments made to punches that vary from a scheduled clockable lunch or break.

Specify a value for **Adjust Backward Lunch/Break Outs Before Grace**. This field sets the limit of the adjustment to be made to lunch/break clock-outs that occur outside the grace period.

Specify a value for **Lunch/Break Early Out Without Exception**. This field sets the offset from the scheduled lunch or break that the clock-out may occur without generating an exception.

6 To define the Employee Type's default holiday absence code and how clocked hours on a holiday are to be handled, specify this information on the **Holidays** tab:

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.

Use Holiday Calendar
Select to cause the Taskman utility to use the Holiday calendar to automatically generate the default Holiday absence code on the holidays defined in the holiday calendar.

Report Date Adjustment
Select to cause the Taskman utility to offset the generation of the holiday absence to the first prior working day or to the next subsequent working day should a holiday report date fall on a non-working day as defined in the shift. The direction of the offset is defined in the holiday report date configuration.

Check Holiday Eligibility
Select to cause the previous scheduled work day to be checked to determine if a full day was worked. If a full day was worked, the holiday absence will be generated without issue. 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 portion of the Employee Types form.

Clocked Hours On Holiday OT Eligible
Select to count clocked hours on a holiday toward the Overtime Threshold for the week.

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 Rules based on the number of hours in the week.

In the **Clock Hours Work Code** field, specify how to categorize clocked hours on holidays. If you select **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 select **OT Eligible**, clocked hours on a holiday will categorize per the OT rules specified on this tab. If you select **OT Eligible**, specify this additional information:

Regular 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 hours to authorize using the HHMM format.

Premium Code - Regular
Select a premium code for regular hours clocked on holidays.

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

Premium Code - OT
Select a premium code for overtime hours clocked on holidays.

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

Premium Code - DT
Select a premium code for double time hours clocked on holidays.

Overtime Before Shift Hrs
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 regular hours to authorize using the HHMM format.

Premium Code - OT Before Shift
Select a premium code for clocked time occurring before a shift when a complete week is required and not met for overtime.

Double Time Before Shift Hrs
Configure this field only if hours are booked against shifts that are Static AND contain Daily component as OT Method. Specify the number of regular hours to authorize using the HHMM format.

Premium Code - DT Before Shift
Select a premium code for clocked time occurring before a shift when a complete week is required and not met for double time.

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 in the payroll extract.

7. The **quantities** enables quantity reporting that is executed in the RealTime Transaction form, Elapsed Detail and Dashboard Transaction forms. The parameters are active for all Time Track integrations. On the Quantities tab specify this information:

Allow Quantity Reporting
The filed is selected by default.

Note:

- If this parameter is selected the primary parameters (**Allow Rejected Quantities**, **Allow Out of Sequence Reporting** (SL integration only) and **Restrict Qty Complete to Qty Received** (SL integration only) fields) are active and displayed.
- If this parameter is cleared the primary and secondary parameters are not displayed.
- 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. However, only **Open Quantity** field is 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.

Allow Out of Sequence
This field is displayed, only if **Allow Quantity Reporting** parameter is selected. This check box is displayed for SL integration parameters only.

Restrict Qty Complete to Qty Received
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
This is a primary parameter.

Note:

- 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
This field is displayed, only if the **Allow Complete Operation** parameter is selected.

Note:

- 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.

8 If employees of this employee type will be using worksets, on the **Workset** tab, 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:

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.

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

This tab is used to define the characteristics of the 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
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.

- Track Name: Defines the name of the set of rules a series of points thresholds refers to.
- Sequence: 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.

10 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, if required to generate an email to the supervisor, when to prompt the supervisor that an action must be processed and the text to use in the prompts message, that the supervisor receives. The tab configures the incident thresholds for the track specified in the Track Names sub collection.

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 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 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 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.

11 Click**Save**.

Configuring Facility Parameters

To configure 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.

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.

4. 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**.
5. 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

To configure 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 or 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.

Generating Holidays

Use the Holiday Generator form to generate holidays for employees. You can generate holiday dates manually or configure them to be automatically generated as a background task. 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. Optionally, to clear all fields, click **Clear**.
5. To generate holidays that match all specified criteria, click **Process**.

Configuring Payroll Schedules

To configure payroll schedules:

1 Open the Payroll Schedules form.
2 Select a blank line or an existing payroll schedule from the grid at left, then specify this information:

Payroll Schedule
Specify a name for the payroll schedule.

Description
Specify a brief description.

Facility
Select the facility that will use this payroll schedule.

3 Specify a payroll calendar start date and payroll year.
4 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.

5 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 check box 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.

- 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.
- In the Extract Configuration section, specify the position and, if applicable, length and justification for information on the extract.
- To create the payroll schedule, click **Generate Payroll Schedules**.
- 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.

See "Modifying Individual Payroll Records After Processing" on page 66 and "Modifying Hours Totals for a Pay Period after Processing" on page 66.

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.

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.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.

- 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.
- The **Extract** field shows the information types included in the payroll extract and the sequence in which they will display.
- Optionally, in the **Comment** field, specify why the hours totals were adjusted.
- 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

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 66.

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" for information on creating payroll schedules.

   - 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.
   - Records that match your specified selection criteria are displayed in the bottom grid.
   - To only display records that are ready for approval and processing, select the **Submitted** filter. Ensure all other filters are cleared.
   - Select the check box to the left of each record you are processing. Optionally, click the **Select All** button to select all records.

- To calculate premium records for the selected records, click the **Calculate Premium** button in the toolbar. Premium records are created.
- Select the **Premium Calculated** filter, and clear the **Submitted** filter. The records for which premiums have been calculated and the premium records are displayed.
- Select the check box to the left of each record you are processing. Optionally, click the **Select All** button to select all records.
- 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 on the Payroll Details Form" on page 68.

See "Working with Records on the Payroll Details Form" on page 69.

Viewing Records on 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 on the Payroll Details Form

1 Open the Payroll Details form.

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

3 To perform administrative functions, click the appropriate toolbar button. See"Using Toolbar Buttons" on page 11 for explanations of the available buttons.

Using the Payroll Summary Form

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

See "Viewing Records on the Payroll Summary Form" on page 69.

See "Working with Records on the Payroll Summary Form" on page 70.

Viewing Records on the Payroll Summary Form

1 Open the Payroll Summary form. If the site is configured to revert payroll, the revert icon is active on 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 64 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 **Extract 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: ny numbers displayed in red have been adjusted from their original values.

Working with Records on 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 64 for information on creating payroll schedules.

- Right-click a record. From the context menu, you can open other forms pertaining to this record (such as the Payroll Detail form).
- 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 Planned Absences

To configure planned absences:

1 Open the Hours Summary form or Hours Detail form.

2 Complete the form and select an employee record.

3 Select the **Planned Absence** icon in the toolbar.

4 Specify an absence code.

5 Specify whether the absence is **Partial** or **Full Day**.

6 Specify a starting and ending date, if applicable.

7 If the absence duration is **Partial**, specify the start and end times of the absence.
8 Click **Submit**. The planned absence is displayed on the Hours Summary and Hours Detail forms.

Configuring Premium Codes

To configure 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 €œtime 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.

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

- Optionally, specify a **Task Code** value. If reduction set time will be posted to ERP, enter the task code under which reduction hours should post to ERP.
- If you select **Clockable**, 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. Always configure clockable breaks as Paid. If the employee does not clock out for a break, then no reduction occurs. Clock-in rules are defined for employee types and are applied to the reduction start and end times in a similar fashion as the clock-in rules applied to shift start and end times.
- If you select **Exclude Absences**, the duration of the reduction will be deducted from absence hours that occur during the defined times of the reduction. If you do not select **Exclude Absences**, no reduction occurs.

Configuring Shift Patterns

To specify shift pattern parameters:

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**.

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.

- 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.
- 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. 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 rules defined in Employee Type to set an overtime threshold. Clocked and OT Eligible hours accumulate through the shift week as regular hours. Upon reaching the overtime threshold, the hours begin to categorize as overtime 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** uses the categorized hours to provide employee with the greatest amount of OT hours.

7th Consecutive Day Measurement Period
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.

- **Shift Week**: A seventh consecutive day is calculated based on the week defined for the shift.
- **Mon - Sun**: A seventh consecutive day is calculated within the interval of Monday to Sunday, so the measurement period resets every Monday.
- **Sun - Sat**: A seventh consecutive day is calculated within the interval of Sunday to Saturday, so 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: Seventh consecutive days are not calculated.

Overtime Threshold
Specify the Overtime Threshold, for shifts using OT methods that contain a Weekly OT component (ie, 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 an additional OT-eligible absence hours begin are categorized as overtime, instead of regular hours. A requirement of 40 regular hours before overtime is paid, 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, OT, and OT Eligible absence hours 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. When the 7th Day parameter is set to None, this functionality does not impact the shifts that are configured to pay Daily OT or Daily and Weekly OT. When the 7th Day parameter is specified, this value represents the daily DT threshold that must be used on that day.

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 7th day.

3 Specify codes for regular, overtime, and double time hours and for overtime and double time that occurs before the scheduled shift. 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** : Hours will be categorized as Regular up to the overtime threshold, then additional hours will be categorized as overtime or double time. Overtime rules and the overtime threshold are specified in the Employee Type form.
- **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 will be 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.

TheSchedule 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 payroll 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.

Creating Absence Codes

To create absence codes, use the **Absences** form.

To create a new absence code:

1. Open the Absences form.
2. Specify an absence code and a brief description.
3. In the General section, specify this information:

   Active
   Select this check box to make this absence code available for employees to select.

   Absence Type
   Specify the absence type that most closely matches the purpose of the absence (**Generic**, **Vacation**, **Holiday**, or **Sick**, **Incident** or **NoCallNoShow**).

   Paid Absence
   If the employee is to be paid for this absence type, select this option.

   Overtime Eligible
   If the absence hours count toward the overtime threshold, select this option.

   Premium Method
   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
Specify the premium absence hours will earn if premiums are allowed for this absence code. This list contains all premiums defined on the Premiums Codes form.

Approval Required
Select this check box to require approval for this absence code.

4 In the Advanced section, specify this information:

ERP Task Code
Specify the code under which absence hours will post to ERP. If you do not enter an ERP task code value, absence hours will not post to ERP.

Payroll Code
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. Optionally, enter a different **Payroll Code** value if these absence hours should be associated with a different code in the payroll extract.

5 In the Tracking section, specify this information:

Tracked
Select to track transaction records and accrual rates and limits.

Carry Forward
This field is only available if **Tracked** is selected. Select to allow unused hours to be carried into the next year.

Carry Forward Absence Code
This field is only available if **Allow Carry Forward** is selected. Specify the absence code to use for hours carried into the next year.

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.
8 The Point System section is used by the Attendance Points System to assign incident values to absence codes.

Note: This section is only enabled if the **Absence Type** field is set to **Incident** or **NoCallNoShow**.

In the Point System section, specify this information:

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

Partial Incident Value
When a partial incident is incurred the value entered here is the amount the employee’s Total Incident Balance will 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 or Hours Detail form using the A icon. Regardless of the setting each report date will generate a separate incident. Similarly, Absence hours for Incident or NCNS ABS Types created using the Planned Absence form linked to the Hours Summary form will treat each report date as a separate incident.
- The Continuous Request parameter will be applied to 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 stand-alone mode.

9 Click **Save and Exit**.

Modifying Absence Codes

To modify existing absence codes, use the Absences form.

1 Open the Absences form.
2 Select the absence code from the grid at the left.
3 Edit the appropriate fields.
4 Click **Save**.

Creating New Tracking Year

Create a new tracking year to track absence records and, optionally, to carry forward unused absence hours into a new year.

1 Open the Create New Tracking Year form.
2 Specify this information:

Tracking Year
Specify the tracking year to create.

Year Start Date
Specify the date the new tracking year will begin.

Carry Forward Option
Select a carry forward option:

- **Omit Carry Forward**: A new tracking year is created, but hours are not carried forward.
- **Carry Forward Only**: Hours are carried forward, but a new tracking year is not created.
- **Include Carry Forward**: A new tracking year is created and hours are carried forward.
- **Attendance Tracking Only**: Only used when **Absence Tracking** is set to off and **Attendance Tracking** is set to on, and using Tracking Year for a measurement period. When used, a new tracking year record with a Null value in the **Time Off Group** field is created on the Employee Record.

Employee
Specify the first and last employees in the range for which you are creating a new tracking year. Optionally, leave blank to create a new tracking year for all employees.

Work Group
Specify the first and last work group in the range for which you are creating a new tracking year. Optionally, leave blank to create a new tracking year for all work groups.

Emp Type
Specify the first and last employee type in the range for which you are creating a new tracking year. Optionally, leave blank to create a new tracking year for all employee types.

Shift
Specify the first and last shift in the range for which you are creating a new tracking year. Optionally, leave blank to create a new tracking year for all shifts.

Department
Specify the first and last department in the range for which you are creating a new tracking year. Optionally, leave blank to create a new tracking year for all departments.

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

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**.

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 Employees to Receive Email Notifications" on page 82 and "Configuring Supervisors to Receive Email Notifications" on page 82.

Configuring Supervisors 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 76 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.

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 f 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**.

Loading Orders from the ERP System

Use the Load 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.

To view records:

1 Open the Elapsed Time Daily Summary 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 the **Restore Selections** button. Use these parameters to define selection criteria:

- **Date Preference**: This field sets the date range for the selection. **Week Start** is the only available option for this form.
- **Week Start**: Specify the date of the week for which you are viewing records. Optionally, use the arrow buttons to select an earlier or later date.
- **Week No**: The week number of the currently specified week start date is displayed.
- **From - To Ranges**: You can specify a range of employees, employee types, work groups, departments, and/or shifts to display. 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. Select an option to include records with that characteristic and deselect an option to exclude records with that characteristic.

3 The hours totals matching your specified selection criteria are displayed for each day of the week.

To view the records for a report date, select a day in the **Select Week Day** field. To work with records:

- To open the Elapsed Time Details form, right-click a record.
- To perform administrative functions or open other forms, select one or more records from the Records Grid, then click the appropriate toolbar button.

Using the Elapsed Time Details Form

Use the Elapsed Time Details form to view, create, and edit elapsed time hours records.

See "Viewing Records on the Elapsed Time Details Form".

See "Creating Records on the Elapsed Time Details Form".

See "Editing Records on 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 on the Elapsed Time Weekly Summary Form".

See "Working with Records on 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 on the Hour Detail Form".

See "Editing Transaction Records on the Hours Detail Form".

Using the Hours Summary Form

Use the Hours Summary form to view and work with hours records.

See "Viewing Records on the Hours Summary Form".

See "Working with Records on the Hours Summary 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.

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**.

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**.