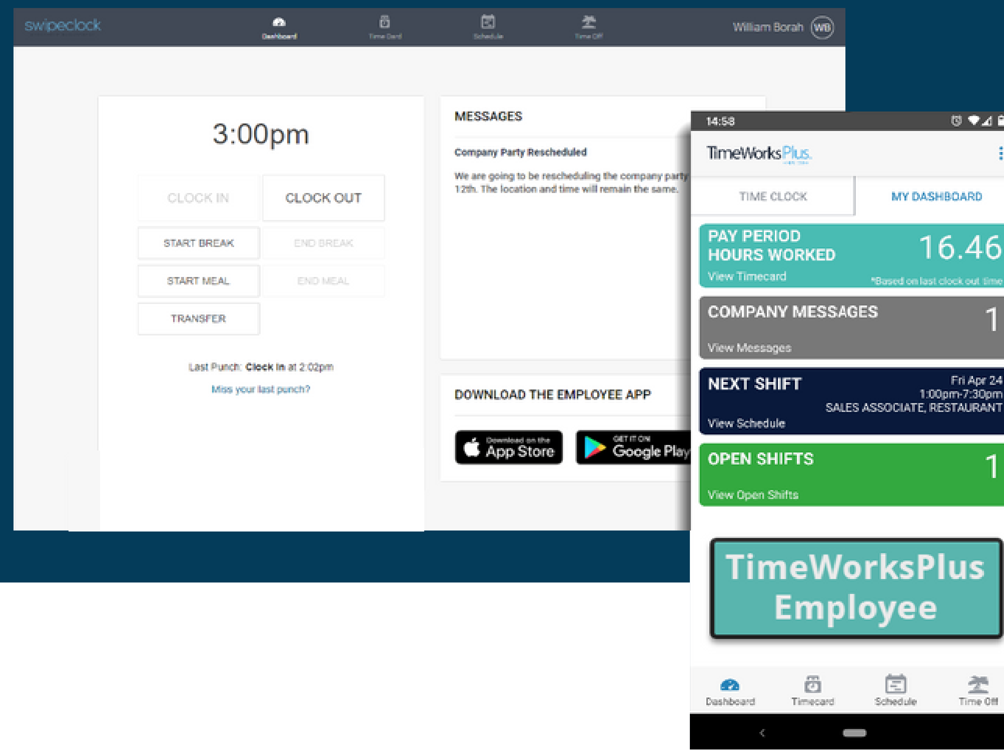
Admin How-To Training Guide



EBC
PAYROLL • HR SERVICES

TimeWorks Plus

Admin How-To Training Guide

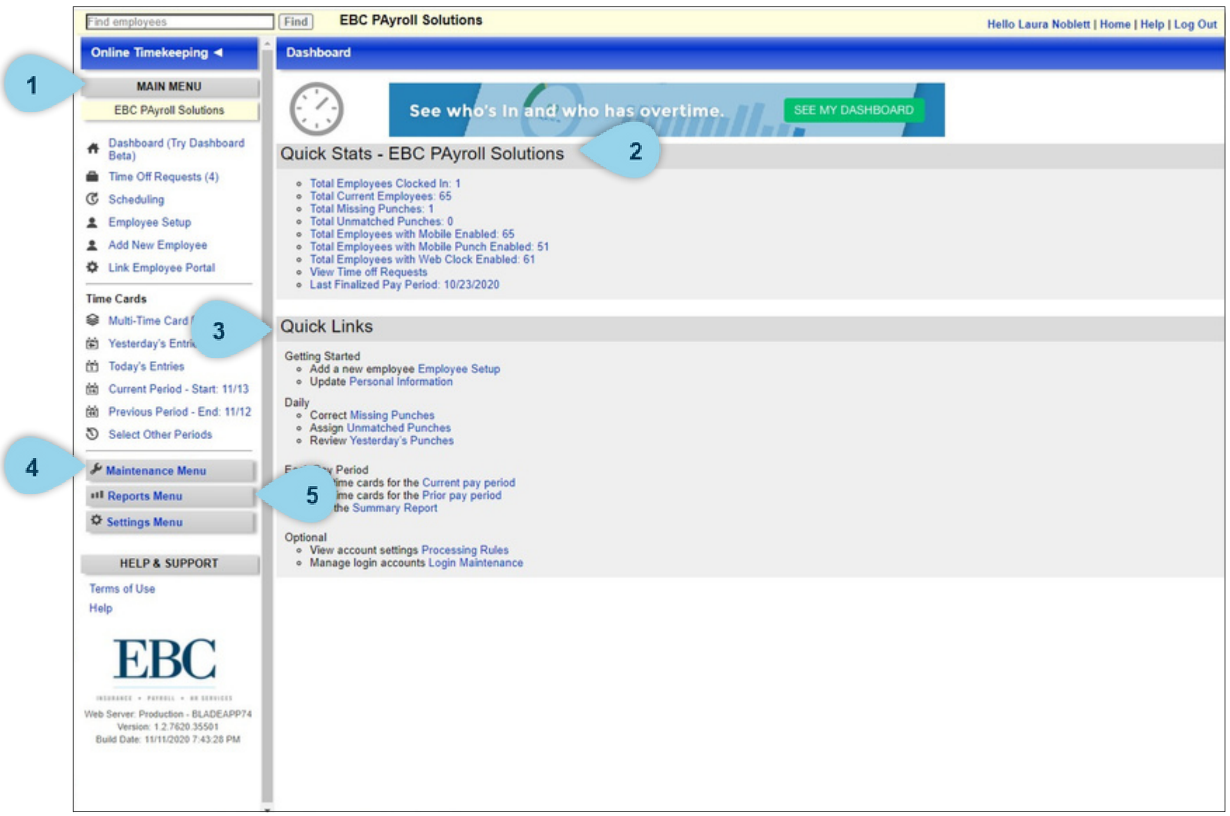
Swipeclock simplifies time tracking so you can spend less time processing payroll. As your employees log time on their tablets, mobile phones, computers, or with a WebClock, you'll eliminate messy time sheets by dumping workforce data directly into your payroll processing platform. This course will review the basics of using Swipeclock so you can streamline your payroll process, eliminate errors, and save time.

Getting Started

This section will review the basic navigation elements accessed through the Dashboard and Main Menu.

Dashboard and Menu Navigation

Each time you log into Swipeclock, you will be directed to your Dashboard.
1. Main Menu includes categories for employee information and setup, time off, and scheduling.
2. Quick Stats gives quick access to your daily functions (e.g. see who is currently punched in).
3. Quick Links gives easier access to items within the main menu.
4. Maintenance Menu is where you will find your Supervisor maintenance.
5. Reports Menu provides a list of defined reports as well as the option to create a custom report.



Using SwipeClock

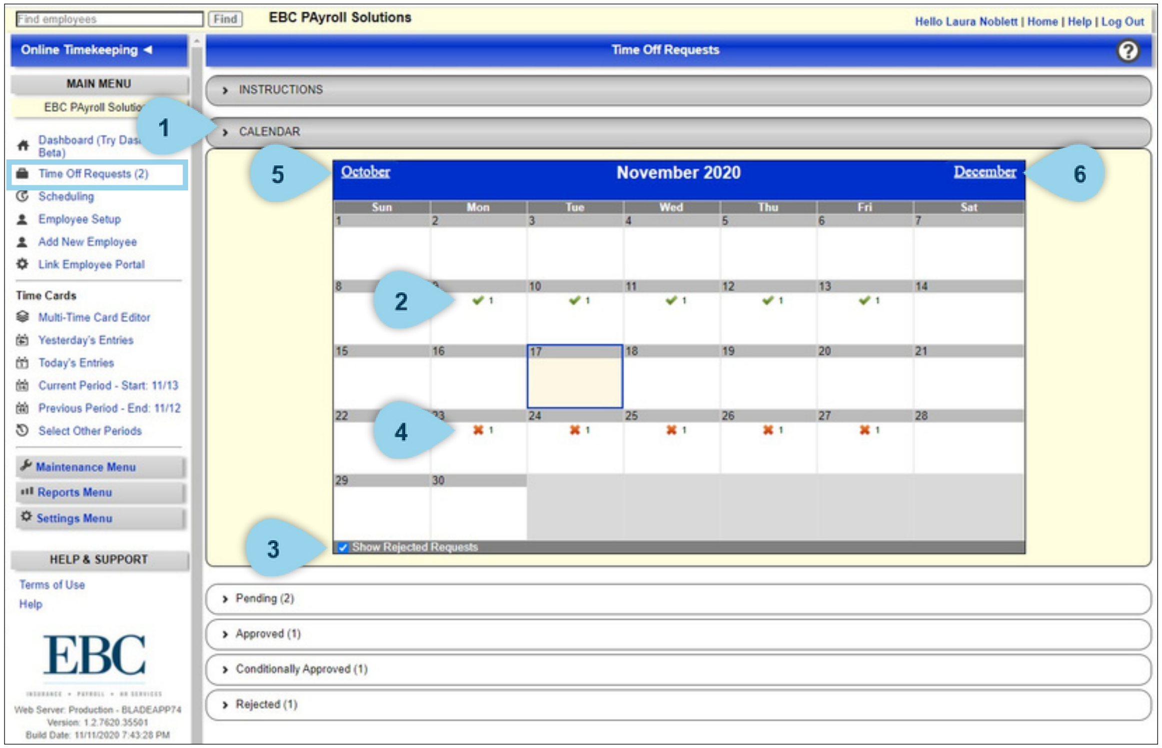
This section will review the components of Swipeclock you will access to:

- Review and reply to time off requests
- Set up employee profiles
- View and edit time cards

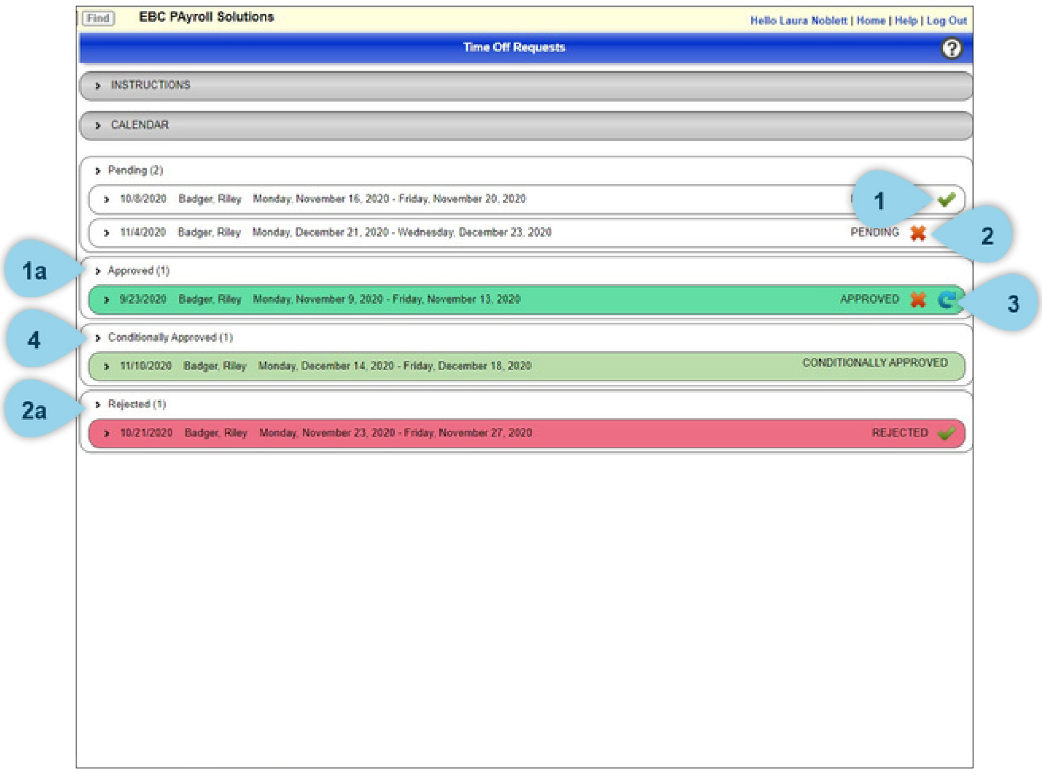
Calendar

To see your time off requests in a calendar view, click Time Off requests in the main menu.

1. Click the arrow to expand the calendar section.
2. Approved time off will be displayed with a green check within the day.
3. To show rejected time off, check the box *Show Rejected Requests.*
4. Rejected time off will be displayed with a red X within the day.
5. Click on the month in the upper left corner to toggle to a previous month.
6. Click on the month in the upper right corner to toggle to a future month.



Time Off Requests



Below the calendar is a list of pending, approved, conditionally approved, and rejected time off requests that you can approve or reject. Click on a request to show greater detail about the time off request. Click again to close the detailed view.

1. Clicking the green check will **approve the request.** This can be performed on pending and rejected requests.
    a. This request will move to the *Approved* section, displayed in green.

2. Clicking the red x will **reject the request.** This can be performed on pending and approved requests.
    b. This request will move to the *Rejected* section, displayed in red.

3. Clicking the blue refresh icon will return the request to the pending state. This can be performed on approved requests. The approval will be cleared.

4. **Conditionally Approved Time Off Requests:** Pending time off requests that were changed, then conditionally approved by a supervisor and need the employee's review. Employees can still reject the changes made on these records. Conditionally approved time off requests are not applied to the employee's time card unless the employee accepts them in the Employee Self Service portal.

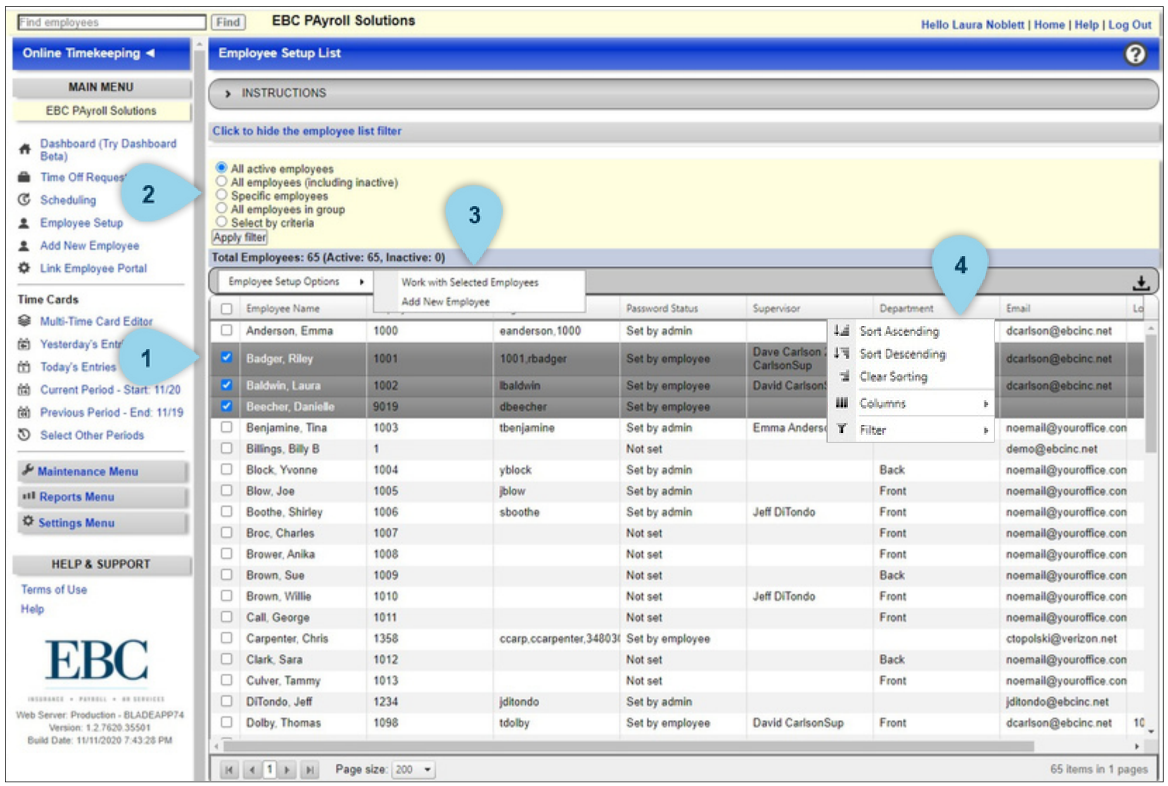
5. A yellow warning icon indicates other employees in the same department who have approved time off on the same day, or during the same time frame. Hovering over the yellow icon will show which employees have approved time off on the same day, or during the same time frame.

6. A blue information icon indicates that a change was made to an approved time off request. Hover over the icon to view details of the change(s) made.

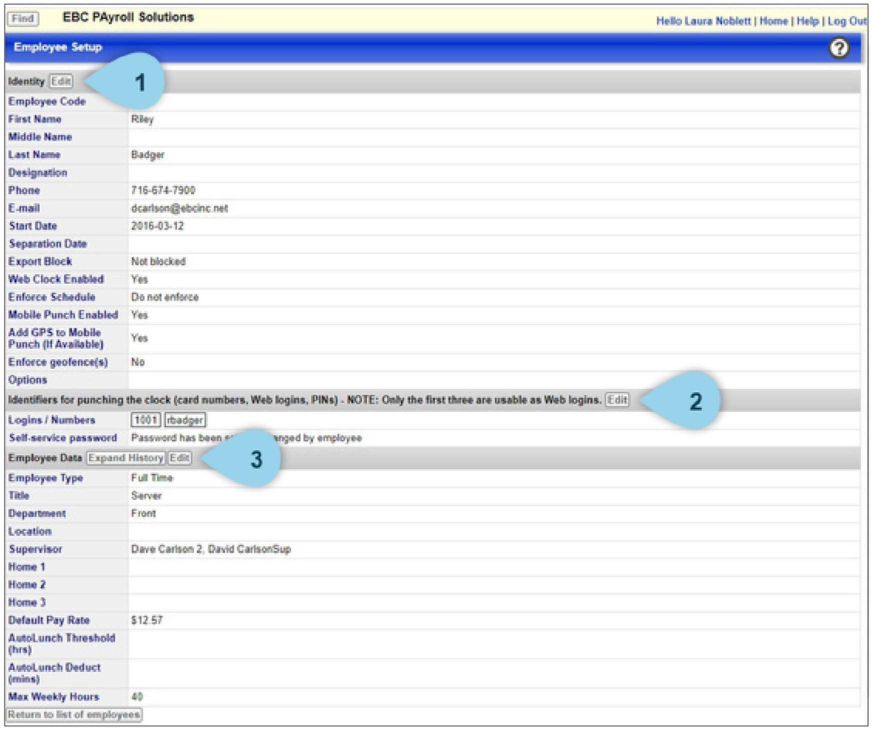
Employee Set Up

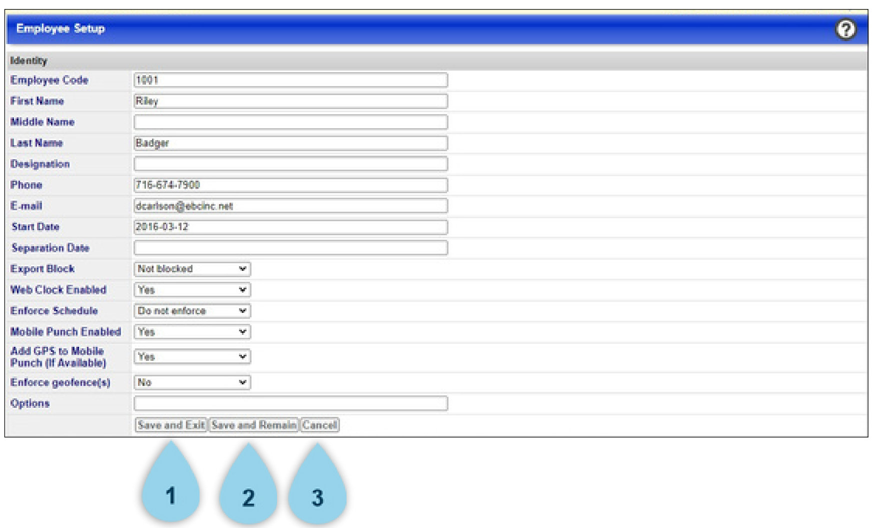
Through the Employee Setup list, you can add new employees or edit information for one or more employees:

1. Click an employee's name to edit their individual information.
2. Filter the visible employee list by clicking the **Employee List Filter** link.
3. Make changes to multiple employees at a time with the checkboxes on the left of the list then choose **Work with Selected Employees** under the **Employee Setup Options** menu.
4. Right click the column headers to add, remove and filter columns.



Employee Setup





On employee's page, there are three sections. You must click the edit button within the section header to edit the information within:

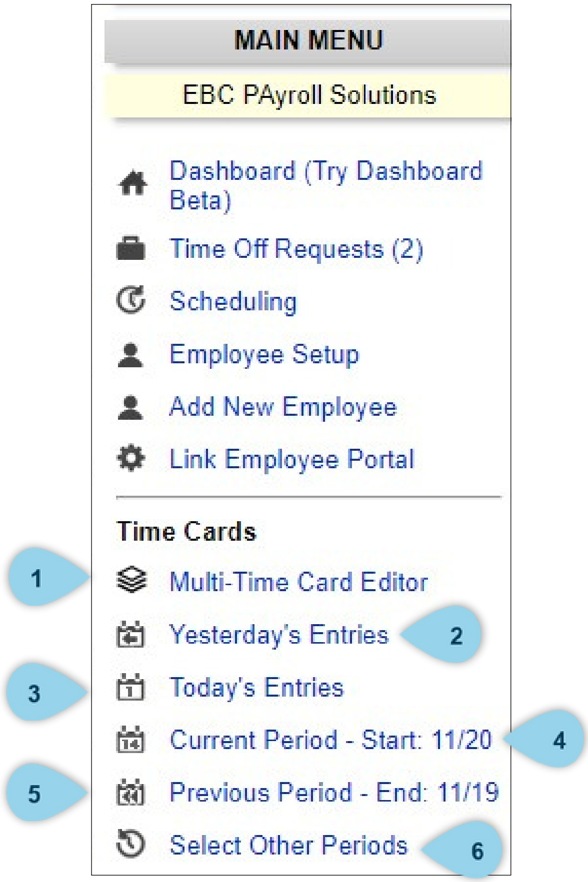
1. Identity
2. Identifiers for punching the clock
3. Employee Data: information in this section must match exactly as other descriptions and policies are built

Note: If you have clicked to edit a section, you will be able to edit only that section.

Once you edit information within the section, click one of the following options to close out of editing:

1. Save and Remain
2. Save and Exit
3. Cancel

Time Card Views



In the Main Menu, you will see the category Time Cards. Each of the links listed allows you to view and edit time for a selected employee during the specific pay period.

1. **Multi-Time Card Edit** enables you to make edits and/or create time card entries for employees by day and save all at once.

2. **Yesterday's Entries** shows the punches for the previous day.

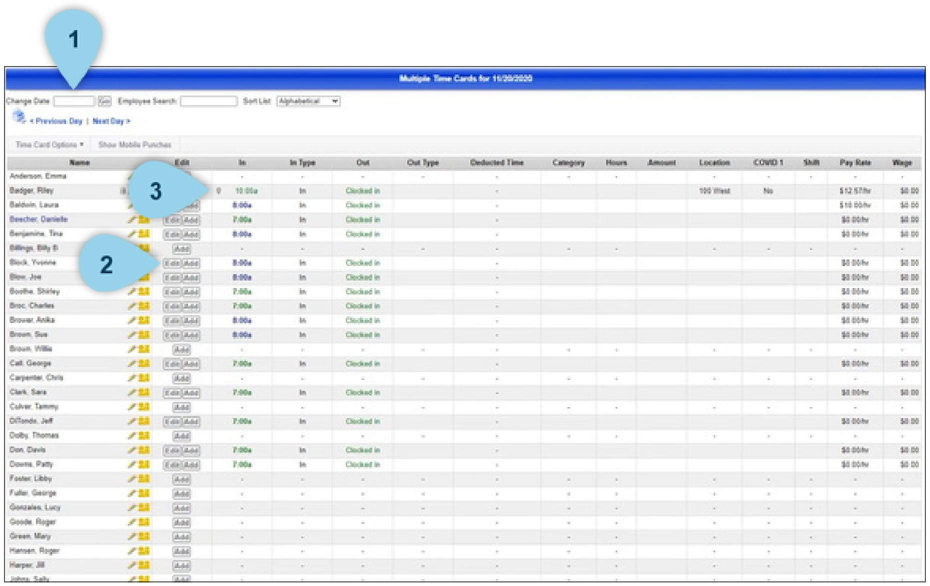
3. **Today's Entries** will show the status of punches for the current day: Punches in and out, lunch breaks, location of punches, etc.

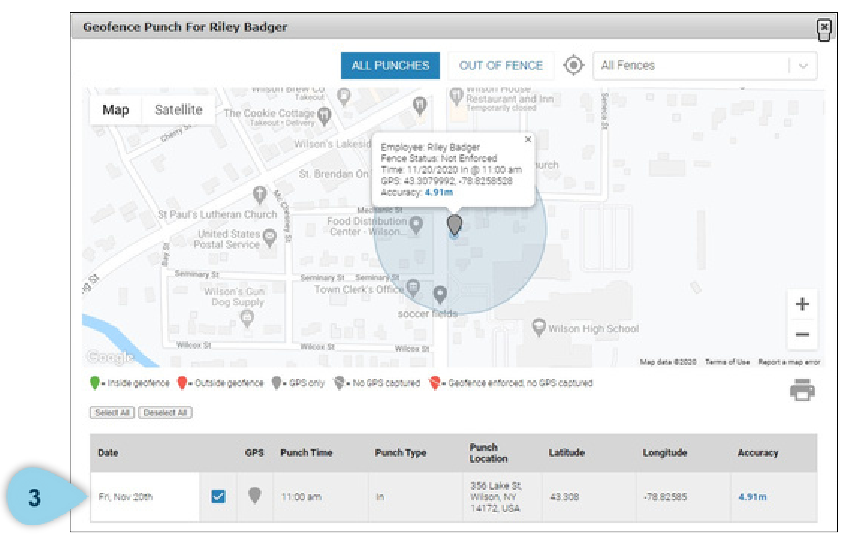
4. **Current Period** shows punch data for the current pay period.

5. **Previous Period** shows punch data for the previous pay period.

6. **Select Other Periods** allows you to find and edit a specific pay period

Time Card Views



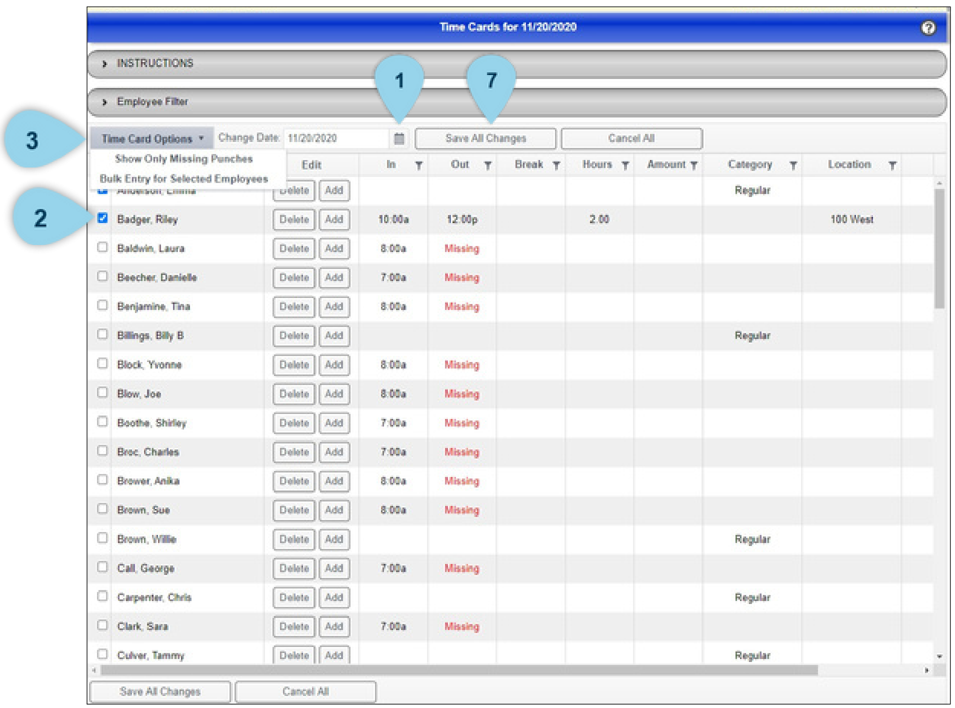


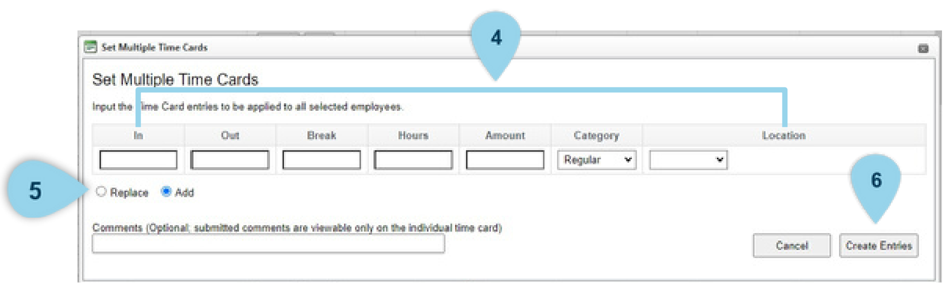
To add or edit a timecard, select a link from the Time Cards list in the Main Menu.

1. Change to any date by entering or selecting the desired date from the calendar button. This will reload the page and populate the entries for the selected day.
2. Edit time by clicking on the corresponding Edit or Add button on the line.
3. Location of punch can be viewed by clicking the location marker next to the employee's punch. This will open location details related to that punch.

The edits will not be applied to time cards until the Save All Changes button is clicked. Changes can also be canceled by navigating away from the page or clicking the Cancel All button.

Time Card Views





The Multi-Time Card Editor page includes the ability to apply In and Out Punches, Hours, Amounts and Comments to multiple selected employees at once. To do this,

1. Select any date by entering or selecting the desired date from the calendar button. This will reload the page and populate the entries for the selected day.
2. Select the desired employees by checking the box next to their name (or select the top box for all employees).
3. Choose the Bulk Entry for Selected Employees option under the Time Card Options menu, this will display the Set Multiple Time Cards page.
4. In addition to the In and Out Punches, Hours or Amount fields, the applicable Category and Labor Prompt fields will also need to be entered (as applicable) before the edits can be saved.
5. Choose how the hours should be added. To replace all selected entries for the day with the new entry, select the "Replace" option. To add the new entry to existing entries, select the “Add” option (this is the default option). Comments can be added for the entries, which will appear as a comment attached to the entry on the time card.
6. When you click on the “Create Entries" button, the entry on this page will be added to the Multi-Time Card Edit page table.
7. To save all of your edits for this transaction, click on the “Save All Changes” button at the top of the page. This will finalize all of your changes to Employee Time Cards.

SwipeClock - Supervisor Account Employee Visibility

- Once a Supervisor User Account has been created, the next step is to define which employees the supervisor sees.
    - If you are using ‘Time Card Approvals,’ you can also select which timecards the supervisor can approve.
- From the Maintenance Menu - Select LOGIN MAINTENANCE – Select the Supervisor you want to modify.

Employee Visibility Options

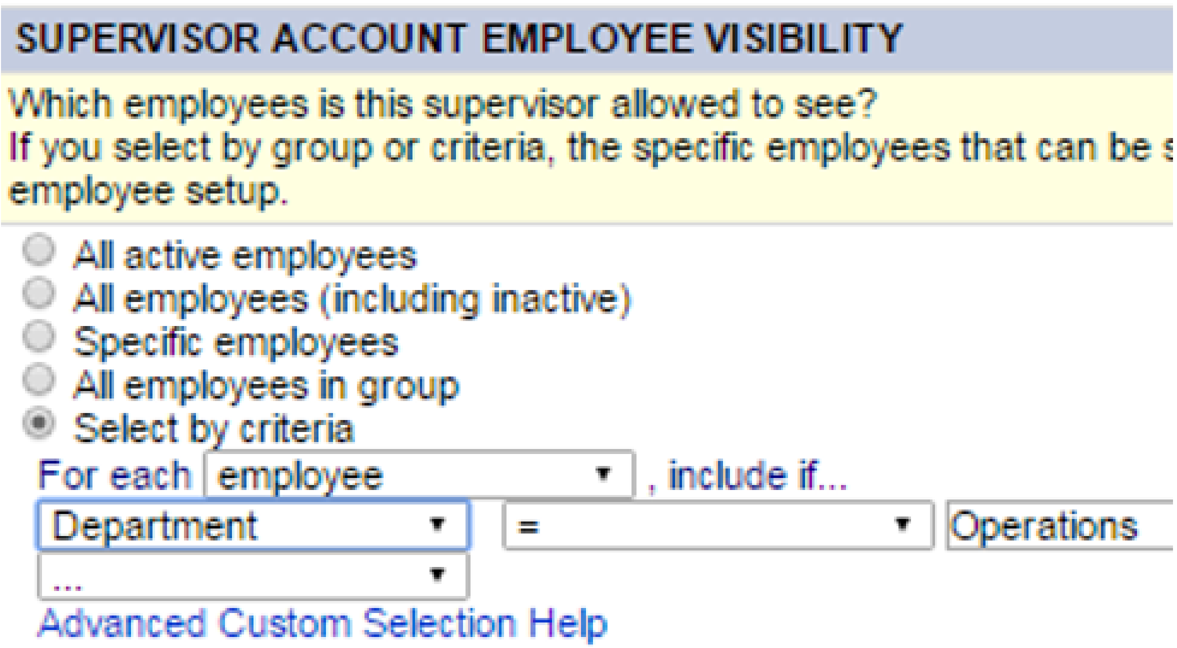
The following list explains the options available for configuring the employee visibility:

- **All active employees** will show all current employees. When viewing historical time cards, supervisors will still see terminated employees during periods in which they were active.
- **All employees including inactive** shows current employees and employees past their separation date.
- **Specific employees** - A checklist of employees will appear where you can handpick the employees the supervisor will view. If you have a large employee list, a dropdown will appear which can filter the list by your Employee Groups.
- **All employees in group(s)** - If you have created any Employee Groups, you can select a group for the supervisor's visibility. Only one group can be assigned to a supervisor.
- **Select by criteria** - This method bases the visible employees on data from Employee Setup. You determine the criteria (such as a department or location) and the system will evaluate the employees and set the visibility.

Select By Criteria Examples

***Example:* For each employee, include if Department = Operations**

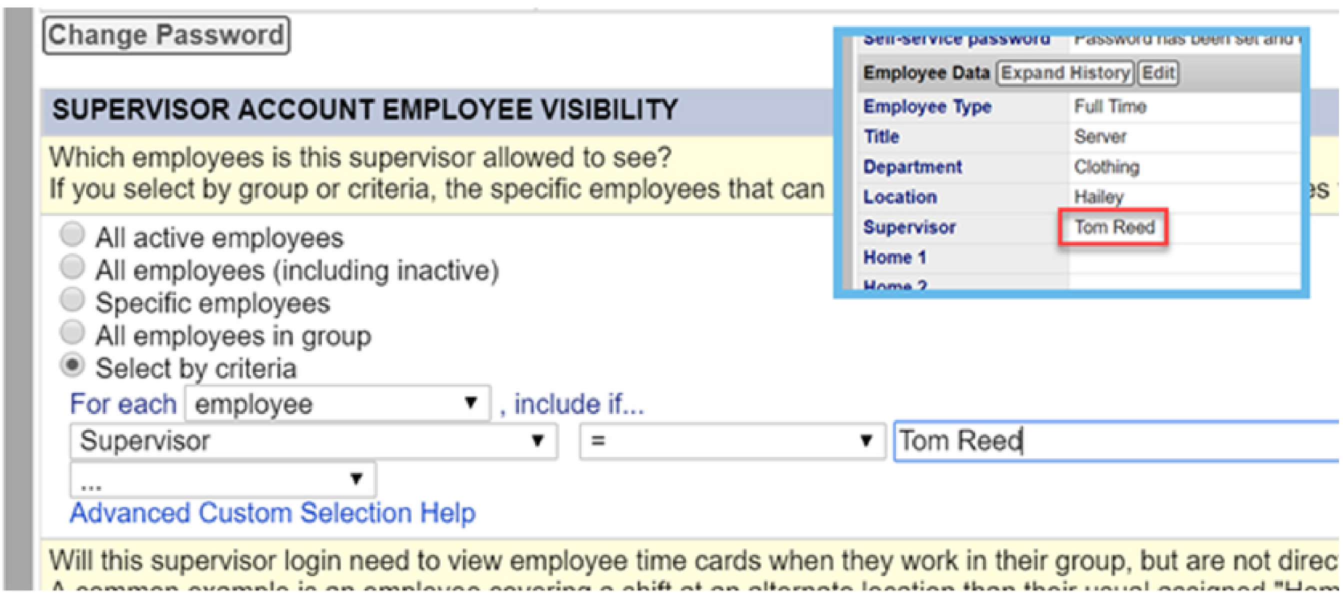
Will only allow the supervisor to view former and current employees who have "Operations" entered in their Department field in Employee Setup.



Configuring a Supervisor to only see employees in the Operations Department

Example: **For each active employee, include if Supervisor = Tom Reed**

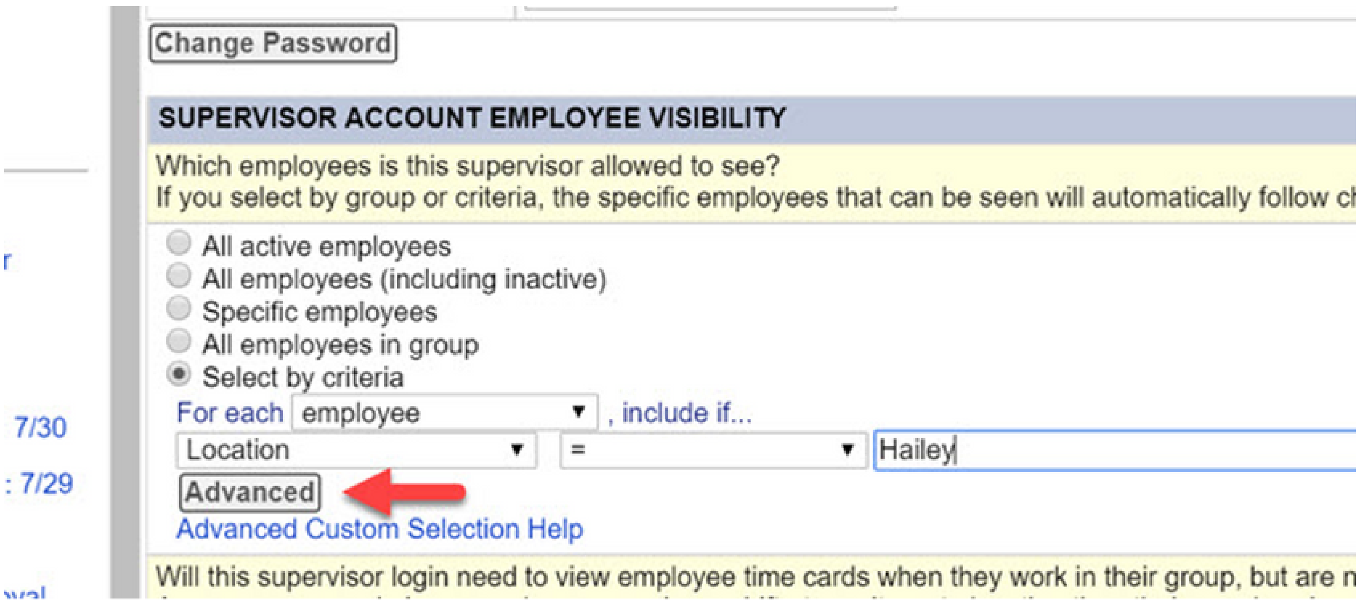
Will only allow the supervisor to view current employees who have “Tom Reed” entered in the Supervisor field of Employee Setup.



By using the Supervisor criteria, the system chooses employees based on the value in Employee Setup.

Select By Criteria Examples

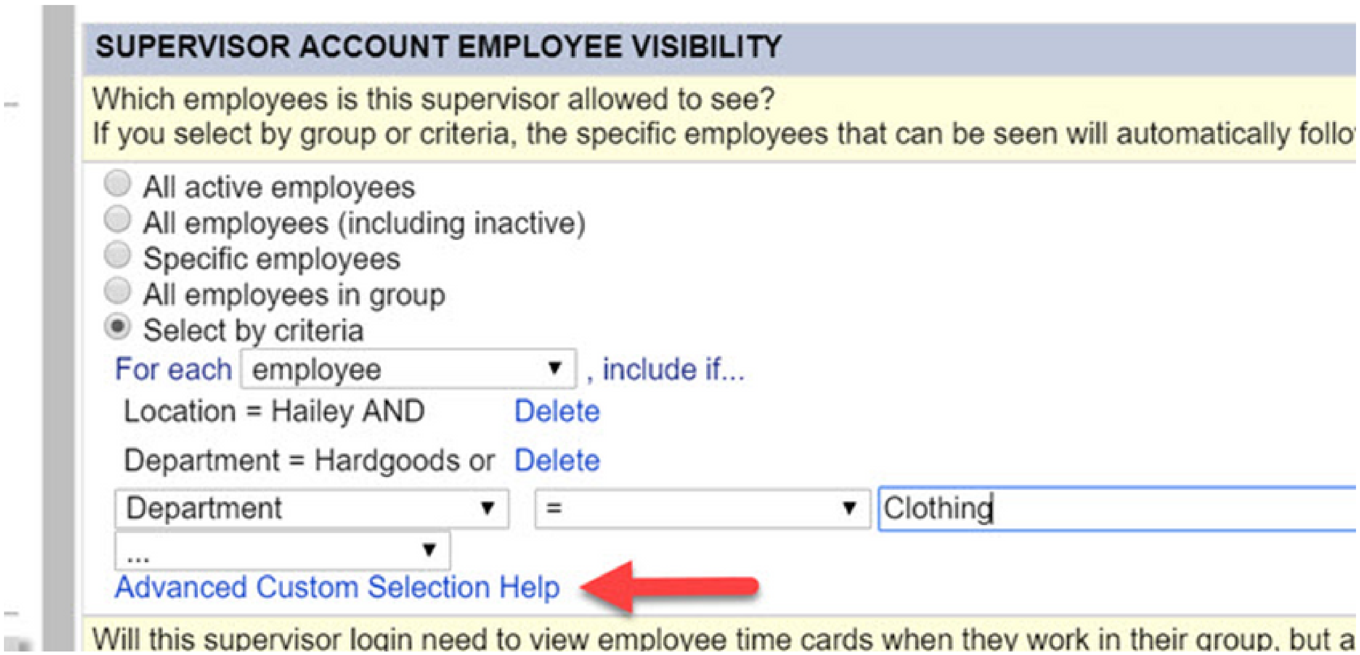
Example: Filter by Multiple Criteria. **You can click the "Advanced" button, below the filter, to use multiple levels of criteria.**



The Advanced button allows you to add additional criteria to the filter

Select By Criteria Examples

In the example pictured here, the filter will look for employees at the Hailey location who work in Hardgoods or Clothing.

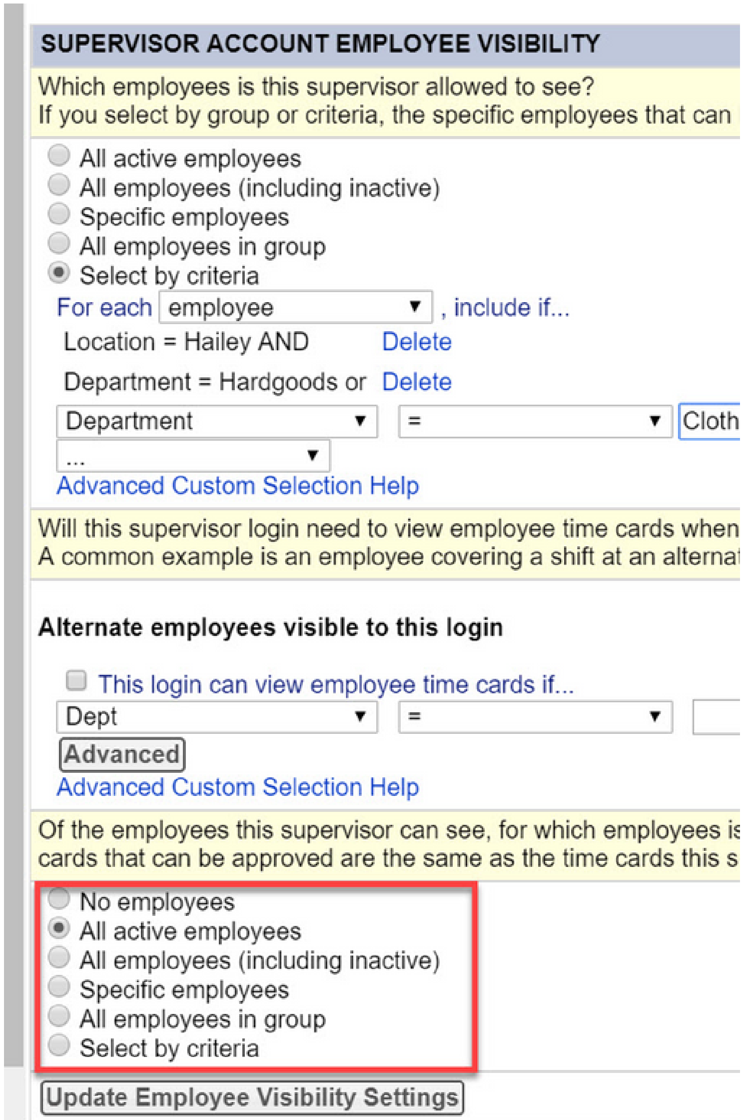


An example of advanced filtering. The "Advanced Custom Selection Help" provides an explanation of this feature.

Time Card Approval Sub-Filtering

There is a second set of filters in this section dedicated to creating a subset of employee time cards that the supervisor can approve. If the supervisor has to approve all their visible employees' time cards, leave this filter set to "All Active Employees".

Sub-Filtering

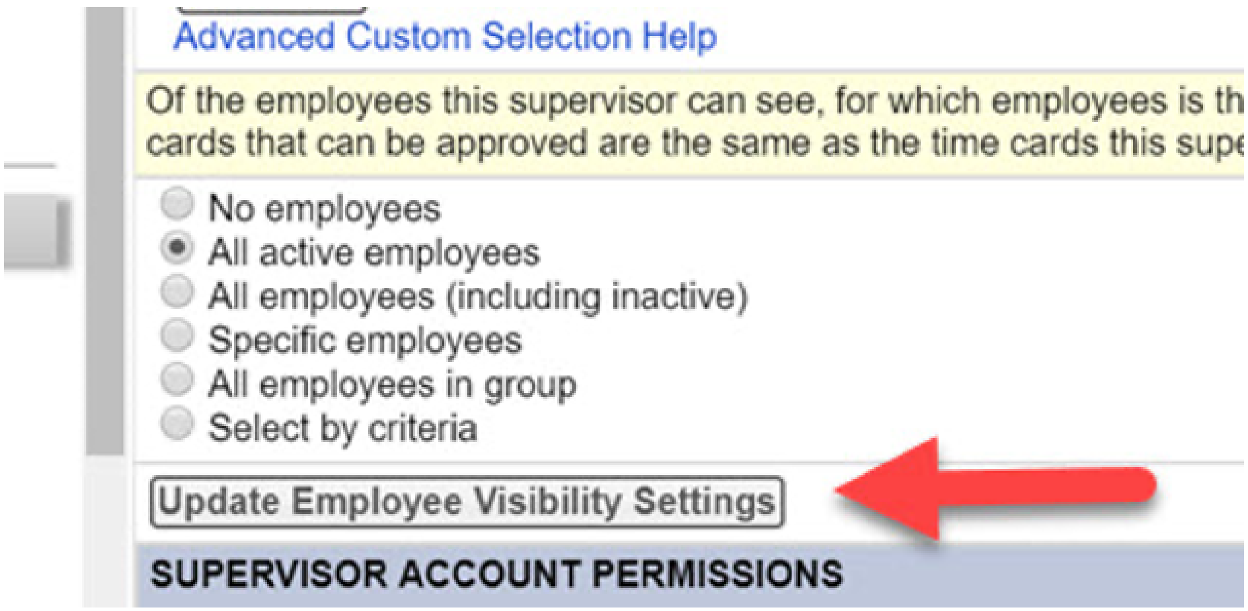


The indicated filter is for designated thing time cards the supervisor has to approve.

Sub-Filtering

Save the Settings

Once the visibility settings are complete, click **Update Employee Visibility Settings.**



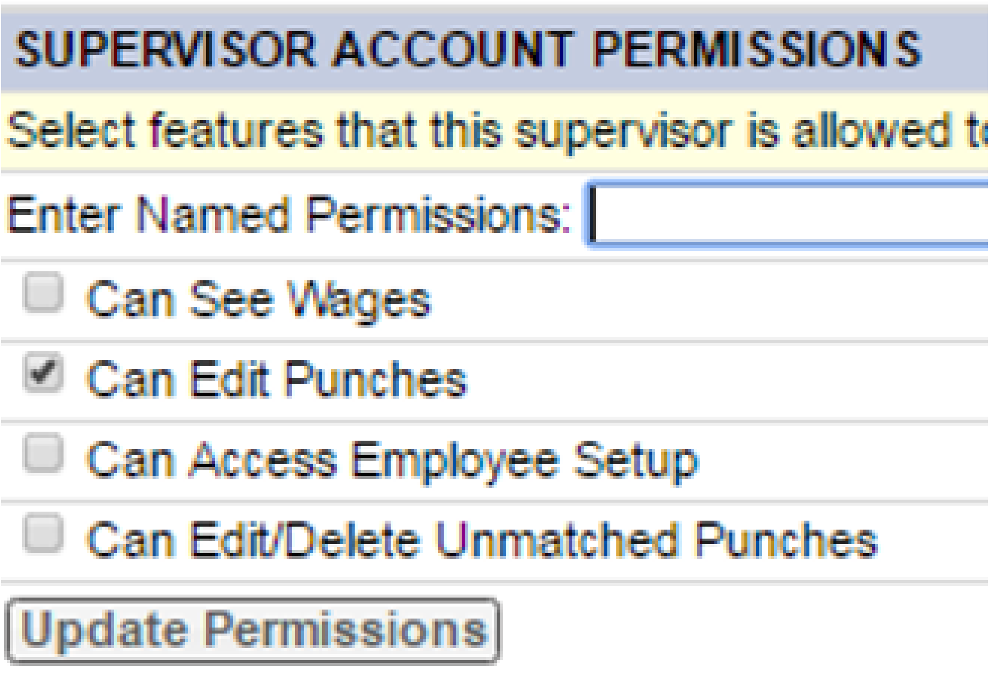
After editing or configuring the visibility settings, you have to click the "Update" button

Supervisor Permissions

Next, determine which permissions the supervisor will have access to from the list of options in the “Supervisor Account Permissions

Supervisor Permissions

- **Can See Wages** will show pay rates and wage data (if enabled) for the supervisors selected employees.
- **Can Edit Punches** allows them to alter their employee time cards and, if used, edit their schedules.



Selecting the features a supervisor can use

• **Can Access Employee Setup** will give the supervisor the ability to add new employees or change existing employee information. If unchecked, the supervisor will not be able to view Employee Setup.
• **Can Edit/Delete Unmatched Punches** will allow the supervisor to use the Unmatched Punch feature. These are punches recorded at the clock which cannot be associated with any employee in the timekeeping system. This generally applies only to system's using wall mounted clocks.

<u>Click Update Permissions to save the settings.</u>

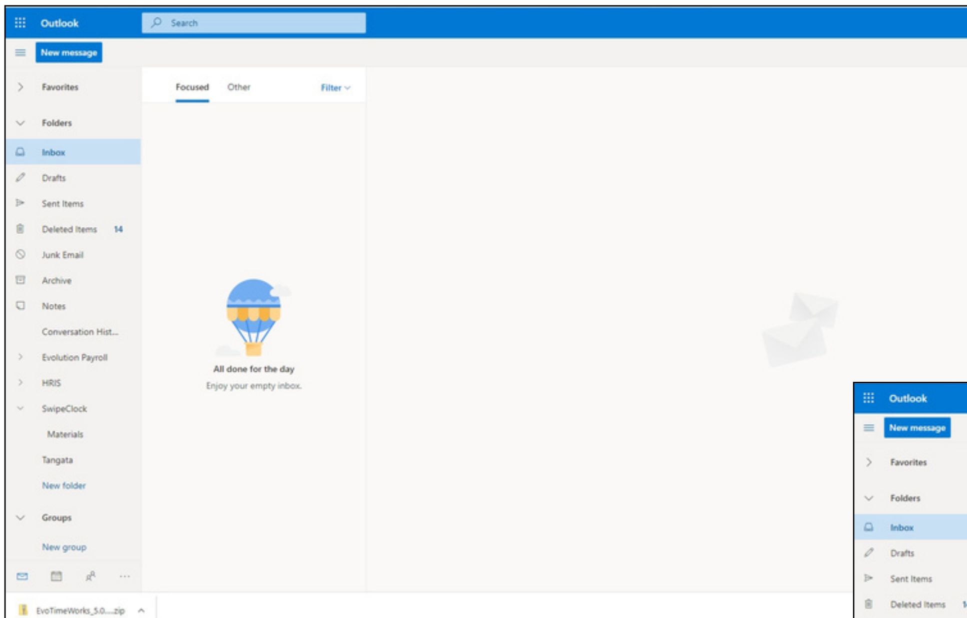
Payroll Imports

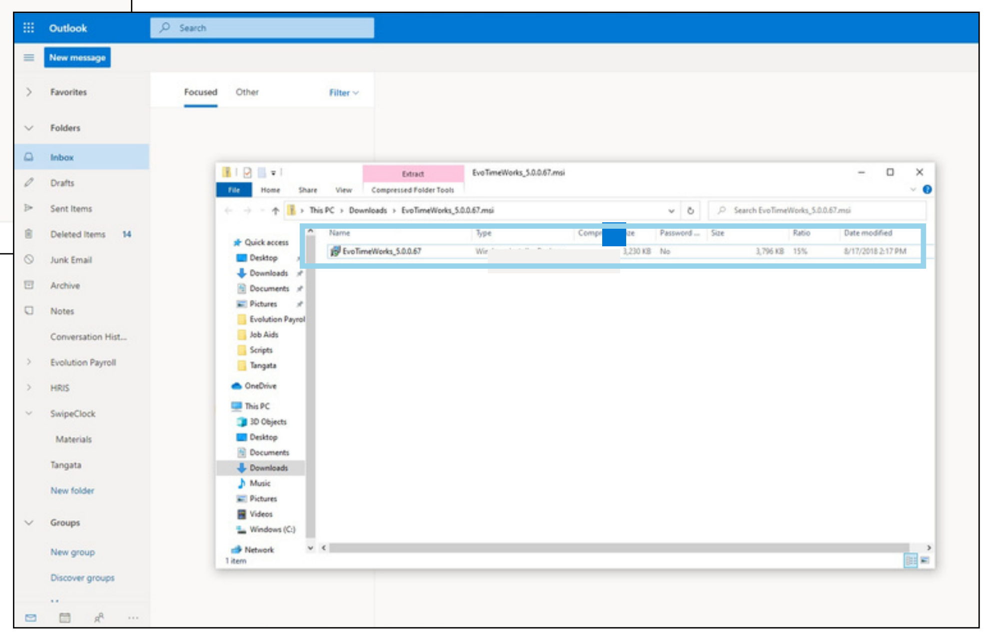
This section will provide instruction for using setting up Evolution TimeWorks Plus and importing hours into Evolution Payroll.

Your Payroll Representative will provide you with your credentials and a direct link to download EvoTimeWorks. Double click on the link. You will be prompted to enter your credentials.

1. Once you enter the provided credentials, a ZipFile will begin to download.

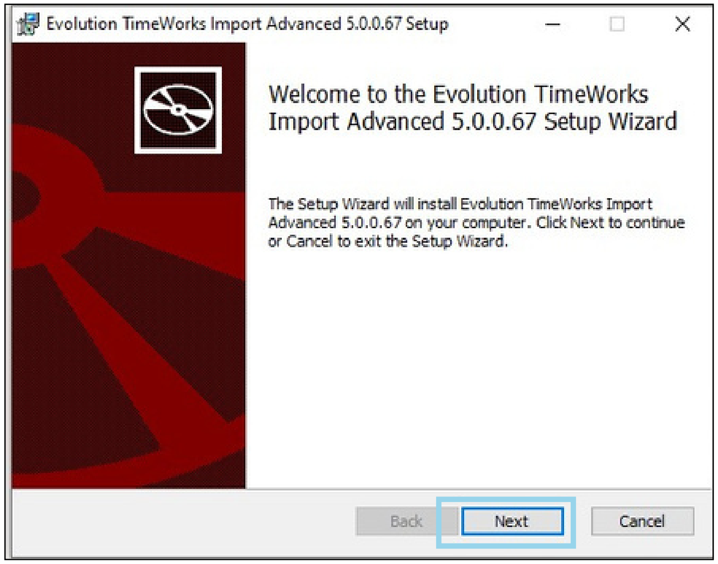
2. Once the ZipFile is done downloading, click to open. You will see a Windows Installer Package named *EvoTime-Works_5.0.0.67*. Double click to open.

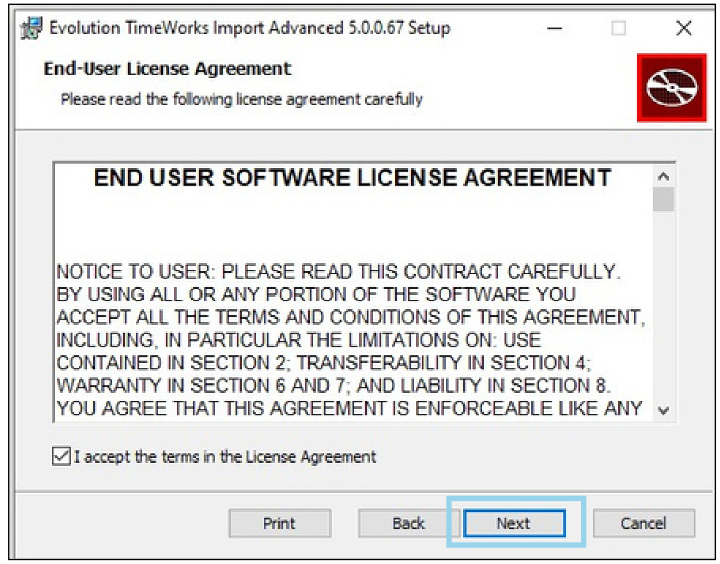


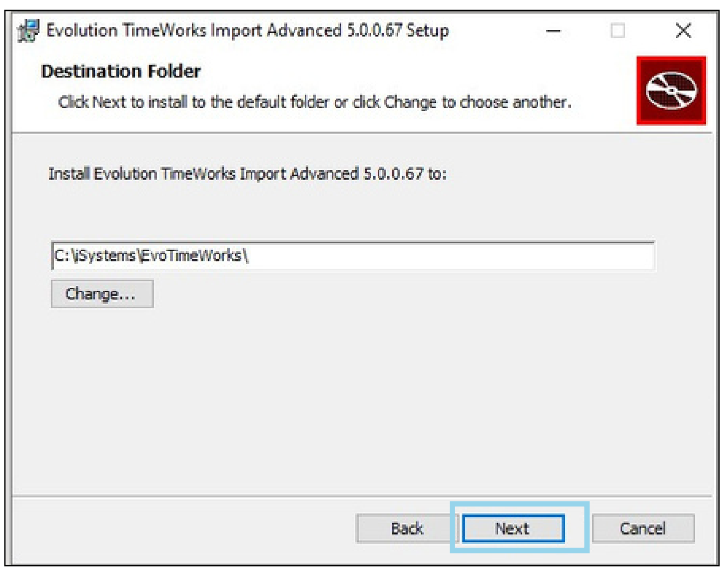


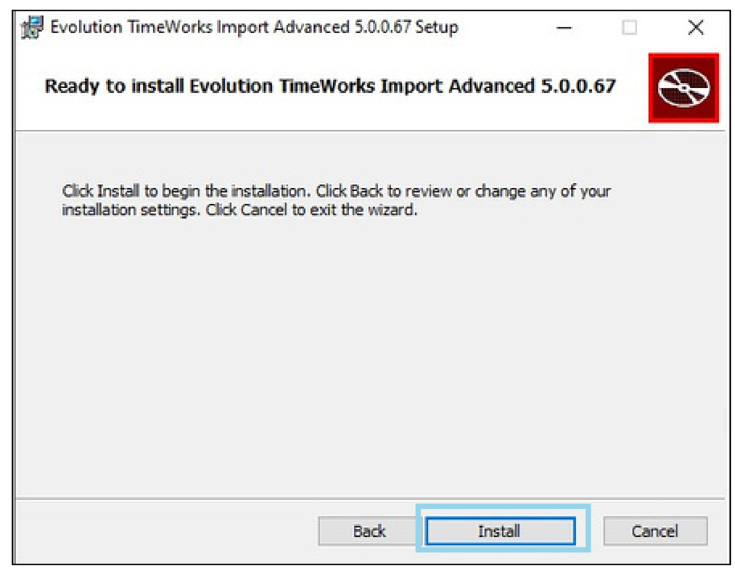
Setup

Follow the prompts to install the software.









Setup

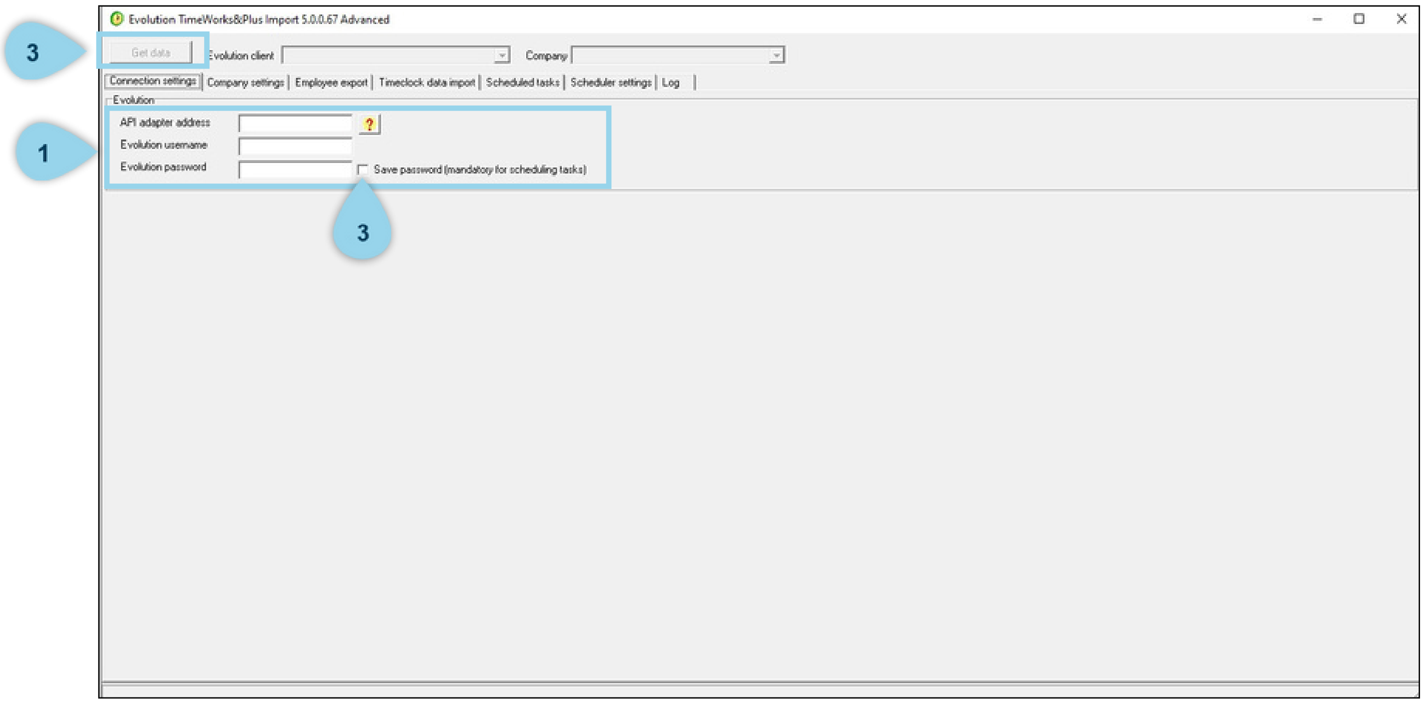
Once the file has been installed, you will see a new program on your desktop called *Evolution TimeWorks Import Advanced*. Double click to open.

Setup

To enter your Connection Settings,

1. Enter our API adapter address and your Evolution Payroll credentials into the appropriate spaces.
2. Check the box to save your password.
3. Click Get Data.

If you do not know our API adapter address or credentials, contact your Payroll Representative for help.

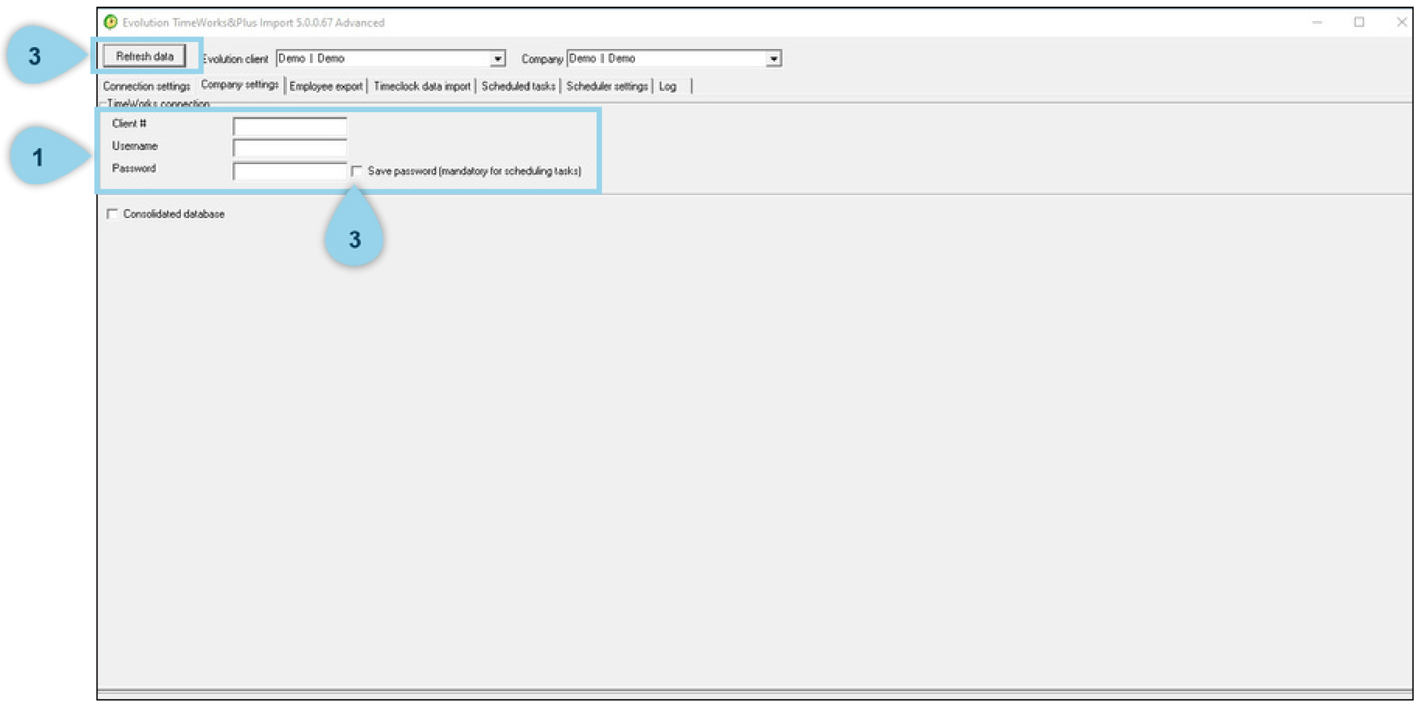


Setup

Connect your SwipeClock settings on the Company Settings tab,

1. Enter your Client # as provided to you by your client service rep and your SwipeClock Username and Password.
2. Check the box to save your password.
3. Click Refresh Data.

If you do not know your client # or credentials, contact your Payroll Representative for help.



Import

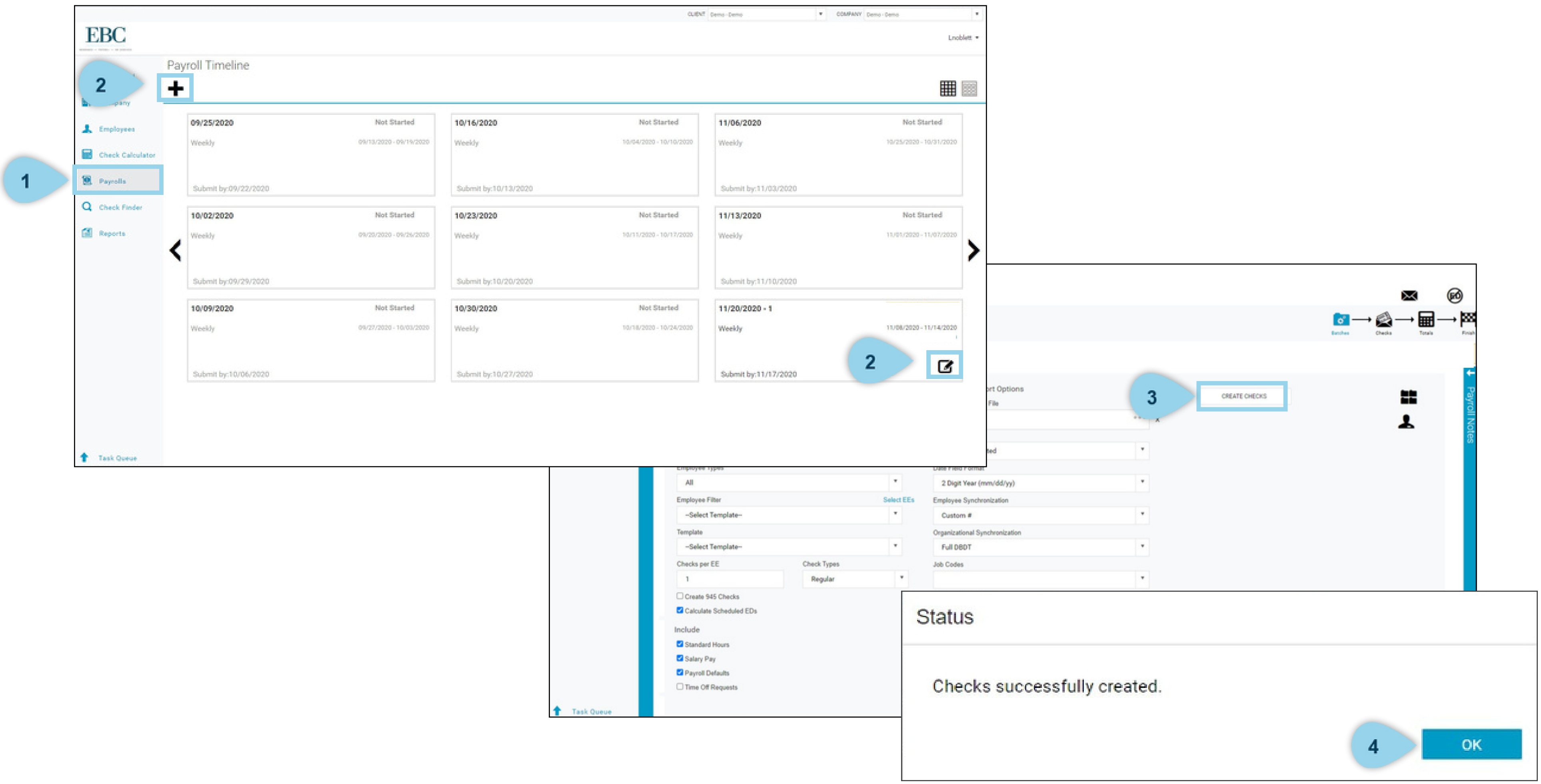
Before importing time, you need to create a payroll into which the hours can import. Log into Evolution Payroll then,

1. Click on the Payrolls tab.

2. Click the big plus sign to create a new payroll or click the edit icon to open an existing payroll weel.

3. If everything looks correct, click Create Checks.

4. An alert box will appear that states “Status: checks successfully created”, click OK.



Import

Switch back to the Evolution TimeWorks Plus Import. Refresh data then,

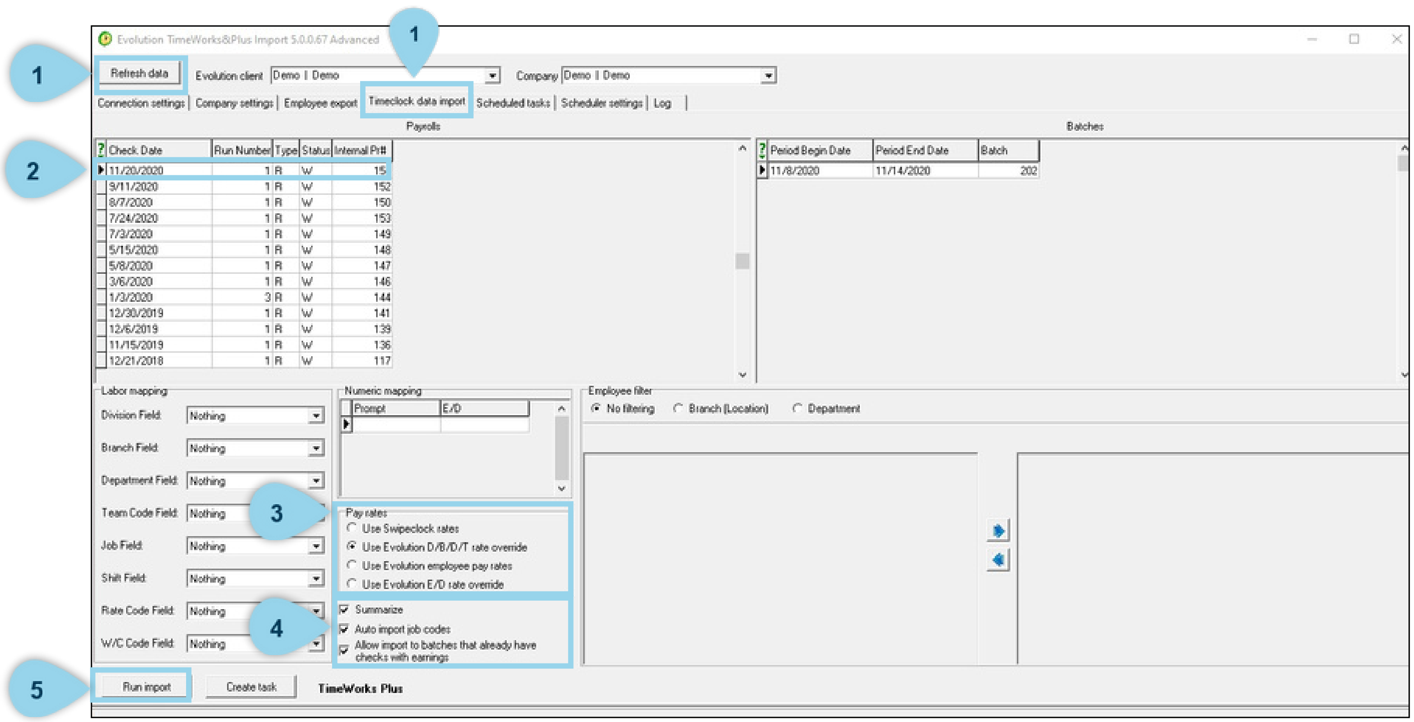
1. Click on the Timeclock data import tab, then click Refresh Data.

2. Select Check Date—this will be the same payroll date for the payroll you just created in Evolution Payroll.

3. For Pay Rates—select *Use Evolution D/B/D/T rate override.* After making this selection the first time, it will save as your default setting.

4. Check all three of the following boxes—Summarize, Auto import job codes, Allow import to batches that already have checks with earnings. After making these selections the first time, they will save as your default settings.

5. Click Run Report.

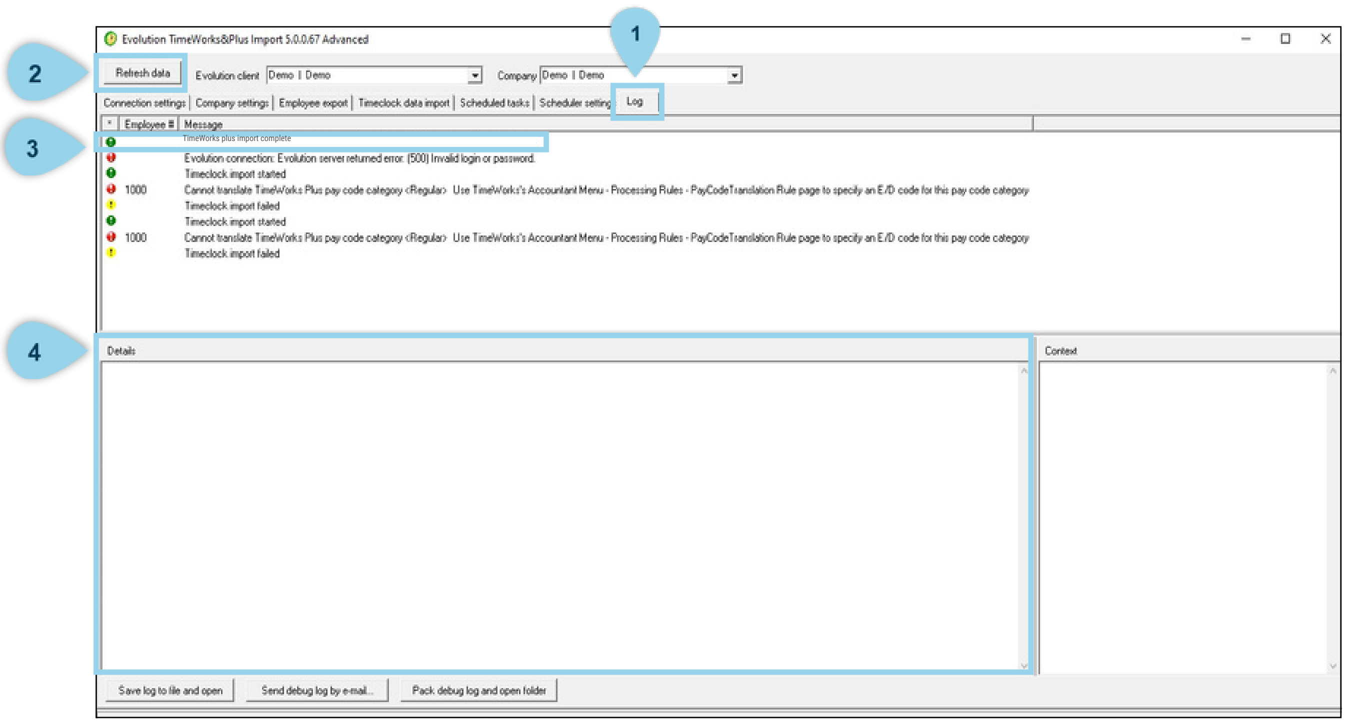


1. Click on the Log tab,

2. Click refresh data.

3. You should see a message stating the timeworks plus import is complete. Double click on this message to review an errors (i.e. having a termed employee with hours due to being termed during the pay period).

4. Error details will be displayed in the Details box.



Import

Go back into Evolution Payroll.

1. Click the Payrolls tab.

2. Locate the payroll week you created, then click the edit icon to open.

3. Here you will see the list of active employees as usual. Hours that were imported will now be listed for the employees who earned hours during that payroll week.