



iSolved | Time
Client/Admin Guide

Table of Contents

Table of Contents 1

Time Card 3

Time Scale 3

Time Card Date Range 3

Symbol 3

Time Card Views 3

Time Card Symbols 4

 Punch Entry 4

 Hours Entry 5

 Hours Detail Preview 6

 Managing Punch/Hour Records 6

 Time Card Verification 7

 Analyze Rules 7

 Requesting Time Off 8

 Time Card Report 9

 Schedule 9

 Time Card – Preview Check 10

Employee Absence 10

 Employee Absences - Search 11

Time Off Balances 11

Employee Calendar 12

 Employee Calendar – View 13

Admin Calendar 14

My Dashboard 15

 Pending Transactions 16

 Alert Monitoring 16

 Employee Punch Status 16

 Scheduled vs. Worked Hours 17

 Earnings Summary of Hours 17

Employee Clock Settings 18

Attendance Rules 20

Manage Shifts 22

 Creating a Standard Shift 22

 Open Shifts 23

 Multi-Level Shifts 24

Default Schedules	25
Pattern Rule.....	25
Weekly Rule.....	26
Applying the Default Schedule.....	27
Employee Scheduler	27
Screen Layout	27
Creating Schedules	28
<i>Scheduling a Single Shift</i>	28
<i>Scheduling Multiple Shifts</i>	29
Schedule Options	30
Remove Schedules Option	31
Weekly Schedule Report Option	31
<i>Employee Options</i>	32
<i>Schedule Totals</i>	32
Time Card View	32
My Calendar	34
Close Pay Period	36



Time Card

The Time Card displays all punches, hours entered, absences and approved time off for each employee. Each client may configure the Time Card to meet their business policies. Depending on your role within the company, the Time Card may be view only or allow you to edit the details of the Time Card. For example, employees typically have read only access to the Time Card because they are using self-service punching or a time clock. Supervisors and Managers on the other hand typically have edit rights to the Time Card to correct a missing punch for an employee, or add labor information. Clients that require employees and/or managers to verify Time Cards will be able to accomplish this task from here. You will find the hours detail for the different earnings types are located at the bottom of the Time Card.



The following is a breakdown of the different areas of the Time Card and their functions:

Time Scale

The  and  buttons (located in the top left of the Time Card) are used to define the time scale view on the Time Card. By default, the Time Card is setup to show one-hour increments, and is adjustable down to 15 minutes increments, which allows 3 views in total (Hour, Half Hour, and Quarter Hour).

Time Card Date Range

The Date Range (located at the top center of the Time Card) allows the user to change the date range being displayed on the Time Card. When the date range is clicked on, the user can specify a specific date to view on the Time Card.

Symbol

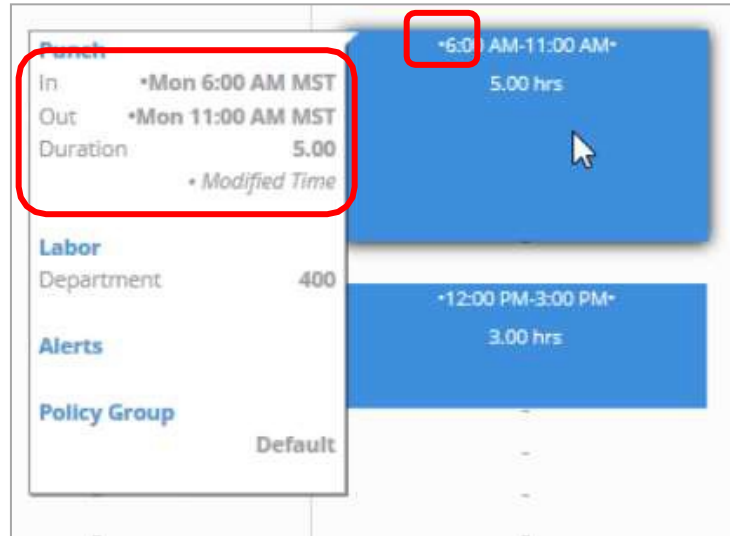
This symbol next to the date range on the Time Card, allows you to determine if the Time Card is in a locked or unlocked state. Locked means changes cannot be made, as payroll is in process or has been completed.

Time Card Views

The Time Card Views (located on the top right of the Time Card) allow the user to change the number of days being displayed on the Time Card. By default, the Time Card will show the Pay Period view, but the other options of Week and Day are available for use.

Time Card Symbols ●

The Time Card will display symbols next to any punches that have been manually entered or manually adjusted. The symbol will appear next to the punch edited. In the slide out window, you will be able to see the modified record.



Punch Entry

To enter a punch on the Time Card, follow the steps below:

1. Using the mouse, click on the Time Card at the time you wish to the punch. The **Punch Entry Area** will appear (as shown below).

Note: The date and time for the punch will automatically be entered for you based on the Time Card area selected earlier in step 1.

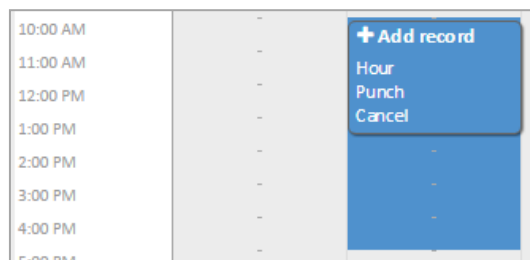
A screenshot of a 'Punch Entry' dialog box. It has a title bar with a close button (X). The 'Time' section contains 'Punch: 01/03/2017 3:00 AM', 'Type: Normal', and 'Mode: Auto'. The 'Labor Default Override' section has 'Department: 05' and a checked 'Do Not Round' checkbox. The 'Notes' section has a text input field. At the bottom are 'Save' and 'Cancel' buttons.

2. Enter the punch type you wish to create. The following options are available:
 - **Normal:** Used for standard in/out punches.
 - **Meal:** Used to indicate a meal out or meal in punch.
 - **Break:** Used to indicate a break out or break in punch.
3. Enter any labor allocation information that you wish to attach to the hours by using the fields in the **Labor** area. Select the **Do Not Round** option to prevent the system from applying Rounding Rules to this punch.
4. Enter any notes information that you wish to attach to the hours by using the **Notes** field.
5. Click on the **Save** button when finished.

Hours Entry

To enter hours on the Time Card, follow the steps below:

1. Using the mouse, click (and hold the mouse click) on the Time Card at the time, you wish to add hours and drag the mouse downward toward the bottom of the Time Card. This will create a highlighted section of the Time Card.
2. Click on the **Hour** link under the **Add Record** menu.



3. The **Start Time**, **End Time**, and **Duration** will automatically be entered for you based on the area selected earlier in step 1.

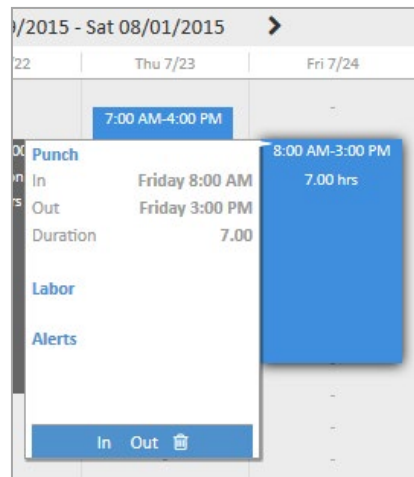
4. Enter any labor allocation information that you wish to attach to the hours by using the fields in the **Labor** area.
5. Enter any notes information that you wish to attach to the hours by using the **Notes** field.
6. Click on the **Save** button when finished.



Hours Detail Preview

Once a punch or hour record is created on the Time Card, details about the record can be viewed by simply holding the mouse over the record on the Time Card.

The hours detail preview displays the following:

- Punch In/Out Time
- Duration of hours record
- Labor Details
- Time Card Alerts

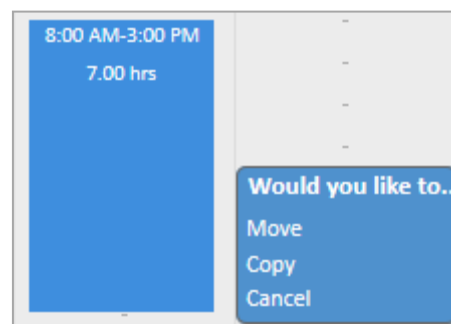


- Clicking on the  icon opens the record up for editing.
- Clicking on the  icon deletes the hour record from the Time Card.
- Once all of the punch or hour records have been created, click on the **Show Results** button to commit the entries to the Time Card.

Managing Punch/Hour Records

Once a punch or hour record is committed to the Time Card, it can be, edited, moved, or copied to another day on the Time Card. Please follow the steps below:

1. To edit an existing record, click on it with the mouse to open it up. Alternately, clicking and holding on the punch or hour record will open the options to move or copy the record. Drag the punch or hour record to the desired area on the Time Card. A new menu will appear as shown below.



2. Select the command **Move** or **Copy**, as required.
 - Move acts like a cut and paste, physically moving the punch or hour record on the Time Card.
 - Copy opens the punch or hours entry area and automatically inputs the same parameters the original record had assigned to it.

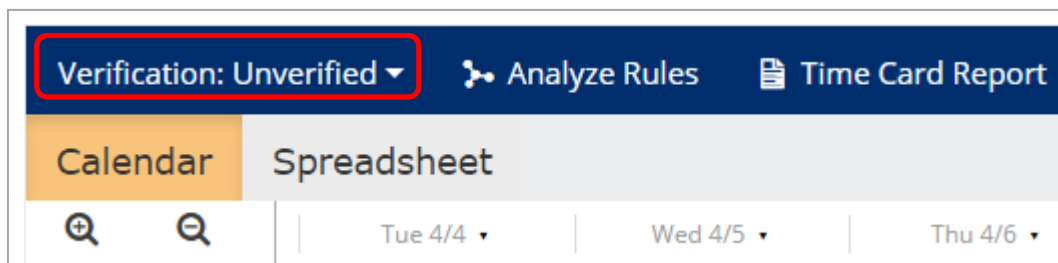
Note: It is important to note that when utilizing meal or break rules, the hour record may be broken into more than one block as a result of the meal or break rule. The Copy command will only copy the portion of the record selected. Currently there is no way to select multiple records for copying at the same time.

3. Once all of the “Move” or “Copy” commands have been entered, click on **Show Results** to commit the records to the Time Card.
4. If notes exist on a punch or hours record, an indicator will appear on the punch/hour segment. The slide out displays the notes, which can be copied and pasted if needed.

Time Card Verification

Time Card Verification is an optional feature that allows employees, managers, and supervisors to electronically sign off on the Time Card, prior to the data being populated to the time entry grid for payroll processing.

The button to verify the Time Card is located in the top left of the Time Card.



When the button is clicked, all verification levels are shown, and a user may click on the appropriate level using the mouse to verify the Time Card for that level.



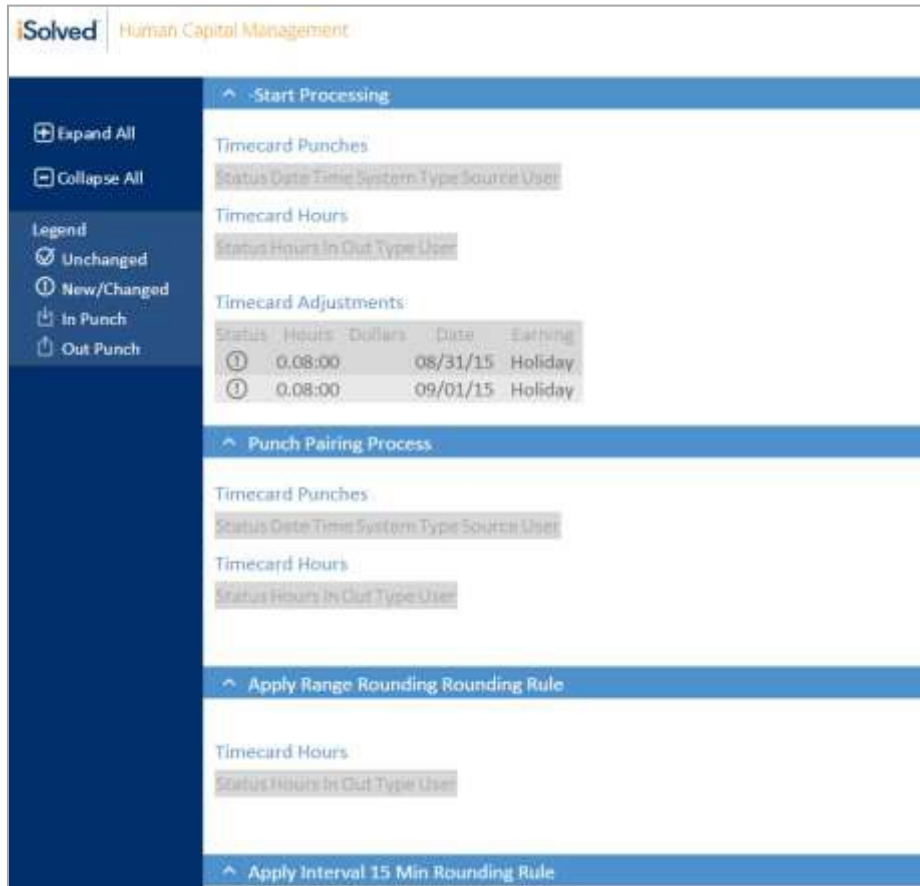
Analyze Rules

The **Time Card Analyze Rules** feature allows any user to step through the Time Card rules and how they are processing to assist with troubleshooting. To access the feature, click on the **Analyze Rules** button (located next to the **Edit/Show Results** button area).



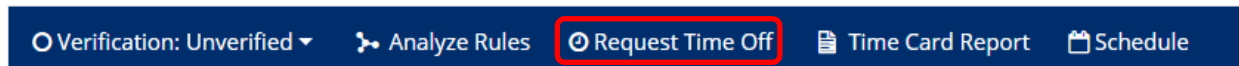
A new window will open up in another browser tab. The new window shows all Time Card rules and processes in the order they are applied to the Time Card. In addition, Included here is the Mobile App Punch details.

Note: Clicking on the link will open the Mobile Punch GPS coordinates in Google Maps.



Requesting Time Off

Users have the ability to submit a time off request from the Time Card screen, by selecting the request time off button on the blue action bar.

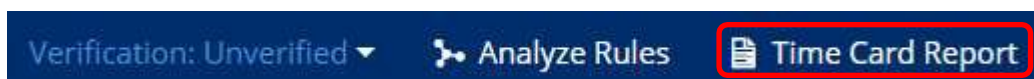


1. Select the **Request Time Off** button from the action bar.
2. Enter the time off request details:
 - a. Select the **Absence Policy**.
 - b. Select the **From** and **To Dates**.
 - c. Enter **Start Time** for the absences.
 - d. Update corresponding dates of the week.
 - e. Enter the numbers of hours per day you are requesting.

3. Review the Projected Balances:
 - a. **After Time off Request:** What the employee balance will be after the request is made. This is simply the current balance minus the request.
Note: This does not take any future awards/pending/limits into consideration after the date of the request.
 - b. **Current Plan Year:** Balance will take all current requests/future awards/pending approvals/limits into consideration to the end of the current plan year.
 - c. **Next Plan Year:** Balance will take all current requests/future awards/pending approvals/limits/carryover into consideration through the end of the next plan year.

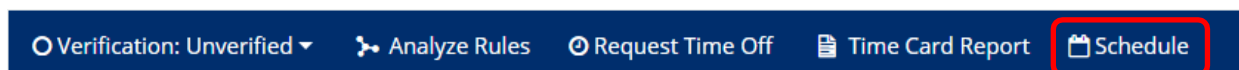
Time Card Report

The Time Card – Time Card Report link allows any user to run the Time Card report for the current pay period without needing to go to the Reports area. This link is displayed to all users and cannot currently be removed.



Schedule

Once schedules have been created, the employee’s Time Card will display the employee’s schedule. Visually, the schedule appears behind all time transactions that are entered, giving the user the ability to quickly see worked time vs. scheduled time



If you are using Attendance Rules in conjunction with your shifts, any alerts generated by discrepancies between employee schedules and the actual punches on their Time Card are displayed.

Click on the **Schedule** icon (highlighted in the above screen shot) to view a report of the employee's scheduled shifts.

Time Card – Preview Check

The Time Card – Preview Check link allows any user with access to this link to preview the check for the employee using the current data on the Time Card. This link can be disabled via the “Time Card Permissions Rule.



Employee Absence

The top of the Employee Absence area allows a user to find absences that have already been entered in iSolved. Please follow the steps below to search for an absence entry:

Go to Employee Self Service > iSolved Time > Employee Absences.

1. Click on the **Add New** button to start a new absence entry.
2. Enter the date for the absence entry in the **Date** field.
3. Select the appropriate absence type using the **Absence** field.
4. Enter the number of hours for the absence entry using the **Hours** field.
5. Enter the start time of the absence, and any comments in the comments fields, if necessary.
6. Select the **Save** button to save the absence entry.

Employee Absences - Search

The top of the Employee Absence area allows a user to find absences that have already been entered in iSolved. Please follow the steps below to search for an absence entry:

Go to Employee Self Service > iSolved Time > Employee Absences.

Employee Absences

From: Absence Policy:

To: Status: To view records for absence policies for which you are no longer eligible, use the 'All' selection.

1. Enter the date range in which you want to search for the absence using the **To** and **From** fields.
2. Select the absence policy type to use for the search, if any, using the **Absence Policy** field.
3. Select the status type to use for the search, if any, using the **Status** field.
4. Click on the **Filter** button.

Time Off Balances

The Time off Balances area is used by employees and managers/supervisors to view data about any accrual policy assigned to the employee. To view the accrual data, follow the steps below:

Go to Employee Self Service > iSolved Time > Time off Balances.

Time Off Balances

PTO Current Balance as of 4/4/2019: 80.00

<div style="background-color: #003366; color: white; padding: 5px; text-align: center; font-weight: bold;">Plan Details PTO</div> <p style="font-size: small; margin: 5px 0;">Plan Year: Jan - Dec Award Schedule: Every Pay Accrual Rate: 6.6670 Last Award Date: 4/4/2019 Service Date: 4/27/2016 Length of Service: 3 Years, 5 Months (41 Months)</p>	<div style="background-color: #003366; color: white; padding: 5px; text-align: center; font-weight: bold;">As of Last Pay Period End 3/29/2019 - 4/4/2019</div> <p style="font-size: small; margin: 5px 0;">Accrued: 6.67 Taken: 0.00 YTD Accrued: 0.00 YTD Taken: 0.00 Balance: 80.00</p>	<div style="background-color: #003366; color: white; padding: 5px; text-align: center; font-weight: bold;">Current Pay Period 3/29/2019 - 4/4/2019</div> <p style="font-size: small; margin: 5px 0;">Projected Accrued: 6.67 Projected Taken: 0.00 Projected YTD Accrued: 0.00 Projected YTD Taken: 0.00 Time Off Requests-Pending Approval: 0.00 Projected Balance: 64.00</p>
<div style="background-color: #003366; color: white; padding: 5px; text-align: center; font-weight: bold;">Current Plan Year Plan year ends 4/4/2019</div> <p style="font-size: small; margin: 5px 0;">Projected Ending Balance: 64.00 Carryover Hours to Expire on 6/27/2019: 64.00 Projected Accrued: Time Off Requests-Approved: Time Off Requests-Pending Approval: Projected Balance: 64.00</p>	<div style="background-color: #003366; color: white; padding: 5px; text-align: center; font-weight: bold;">Next Plan Year 4/5/2019 - 12/26/2019</div> <p style="font-size: small; margin: 5px 0;">Carryover from Previous Plan Year: 64.00 Carryover Hours to Expire on 6/27/2019: 48.00 Projected Accrued: 160.00 Time Off Requests-Approved: 24.00 Time Off Requests-Pending Approval: 0.00 Projected Balance: 152.00</p>	

*Note: Time Off Requests-Pending Approval amounts do not count against projected balances.

The following data is displayed in the **Time off Balances** area:

- Plan Year
- Award Schedule
- Accrual Rate
- Last Award Date
- Service Date
- Length of Service
- As of Last Pay Period details
- Current Pay Period details
- Next Plan Year details

Note: “Pending” Time Off Request Approval Amounts *do not* count toward projected balances.

Employee Calendar

The **Employee Calendar** area is used by an employee to enter a request for time off into iSolved. If the employee enters the request, the manager or supervisor will then approve or deny the request as appropriate within iSolved using the **Admin Calendar** area. To create a Time off Request, please follow the steps below:

Navigate to Employee Self Service > Time > Employee Calendar.



1. Click on the **Request Time Off** button at the top left of the calendar to create a time off request.
2. Enter the time off request details:
 - a. Select the **Absence Policy**.
 - b. Select the **From** and **To Dates**.
 - c. Enter **Start Time** for the absences
 - d. Update corresponding dates of the week.
 - e. Enter the numbers of hours per day you are requesting.
4. Review the Projected Balances:
 - a. **After Time off Request:** What the employee balance will be after the request is made. This is simply the current balance minus the request.
Note: This does not take any future awards/pending/limits into consideration after the date of the request.
 - b. **Current Plan Year:** Balance will take all current requests/future awards/pending approvals/limits into consideration to the end of the current plan year.
 - c. **Next Plan Year:** Balance will take all current requests/future awards/pending approvals/limits/carryover into consideration through the end of the next plan year.

Note: Employees will not be able to submit a time off request for a closed pay period.

Employee Calendar – View

Once the time off request is created, it can be viewed in the **Employee Calendar** area, as shown below:

Calendar		Details	
Request Time Off			
<		today	
April 2017			
Sun	Mon	Tue	Wed
26	27	28	29
2	3	4	5 PTO - FT EE's Status: Approved Hours: 8 Remaining Balance: 69.6924
9	10 PTO - FT EE's Status: Pending Hours: 8 Remaining Balance: 61.6924	11	12
16	17	18	19

As you can see in the example, the absence name, approval status, number of hours per day, and the employee remaining balance are all displayed on the calendar, for the employee.

The detail tab shows the absences in a list format and can be used to filter the list down to only absences within a specific window, absence type, or status. To use the absence detail search, please follow the steps below:

1. Go to Employee Self Service > iSolved Time > Time Off Requests.
2. Click on the **Details** tab.

Employee Absences

From: Absence Policy: ▼

To: Status: ▼ To view records for absence policies for which you are no longer eligible, use the 'All' selection.

3. Enter the date range in which you want to search for the absence using the **To** and **From** fields.
4. Select the absence policy type to use for the search, if any, using the **Absence Policy** field.
5. Select the status type to use for the search, if any, using the **Status** field.
6. Click on the **Filter** button.

# Date	# Absence Policy	# Status	# Hours	# Estimated Available Hours	# Check Date
4/5/2017	PTO - FT EEs	Approved	8.00	88.8324	
4/10/2017	PTO - FT EEs	Pending	8.00	61.8924	

Admin Calendar

The **Admin Calendar** page is used by Managers/Supervisors to approve or reject time off requests within iSolved.

Calendar
Pending Requests

< > today

April 2017

Sun	Mon	Tue	Wed	Thu	Fri
1	2	3	4	5	6
7	8	9	10 Approved: 1	11	12
13	14 Pending: 1	15	16	17	18
19	20	21	22	23	24
25	26	27	28	29	30

To approve a time off request, please follow the steps below:

1. From the calendar, click on the **Pending Requests** tab.

Created Date/Time	Request Status	Employee Number	First Name	Middle Name	Last Name	Description	Estimated Remaining Balance
4/5/2017 10:21 AM	Updates are pending approval	1205	Charlotte	L.	Russon	PTO - FT EE's 4/5/2017 8.00 hours	65.69
4/5/2017 10:22 AM	Updates are pending approval	1205	Charlotte	L.	Russon	PTO - FT EE's 4/10/2017 8.00 hours	61.69

2. Click on the request to open the time off request.

3. Using the menu at the top left (shown in red above), a supervisor or manager can select either "Approve" or "Reject" and click on the **Process** button to process the update.

My Dashboard

My Dashboard was designed to provide you with up-to-date information on your employees, conveniently provided in one screen. You have the ability to review pending transactions, monitor alerts, view employee punches statuses, scheduled hours vs. worked hours, and view a summary of earnings for your employees.

This screen is equipped to cache your filters when switching between pages. The system will hold dashboard filters and previous settings to eliminate the need for users to re-filter each time they visit the Dashboard.

Example: A user logs in and filters their dashboard and selects the **View Time Card** option to correct a missing punch. The system will direct you to the employee Time Card, and when you return to the My Dashboard, all previous filters will be stored.

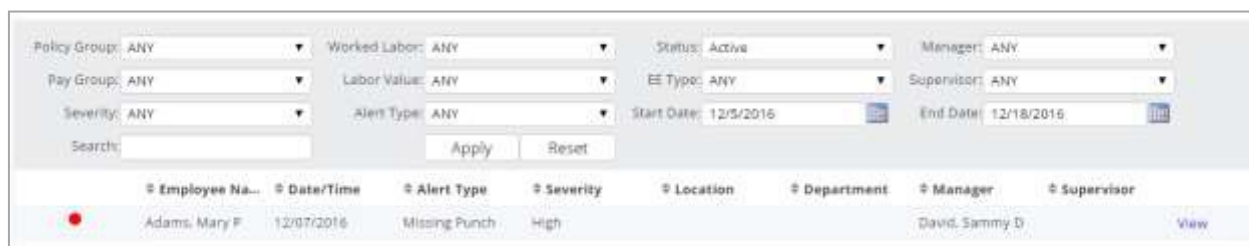
Pending Transactions

The **Pending Transactions** option will alert you if you were included in an approval workflow. This is for items like employee updates, time off requests, etc. You can select the “You have Pending Time Off Requests” or “You have Pending Transactions” option and you will be directed to the appropriate screens for approval.



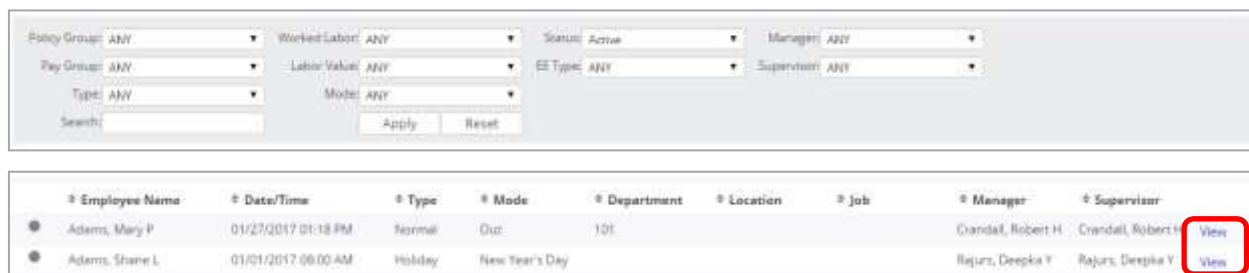
Alert Monitoring

Alert Monitoring allows you to run a quick report on employees with outstanding Time Card alerts. You can filter the report based on many options, and filter to show just one specific alert. The color-coding of the dots on the left side of the screen duplicate the severity you have set up in **Alert Rules**.



Employee Punch Status

Employee Punch Status allows you to see the last activity on your employee’s Time Card. You can filter this screen based on certain criteria to narrow your list. You can select the blue “View” link on the right-hand side to go directly to an employee’s Time Card.



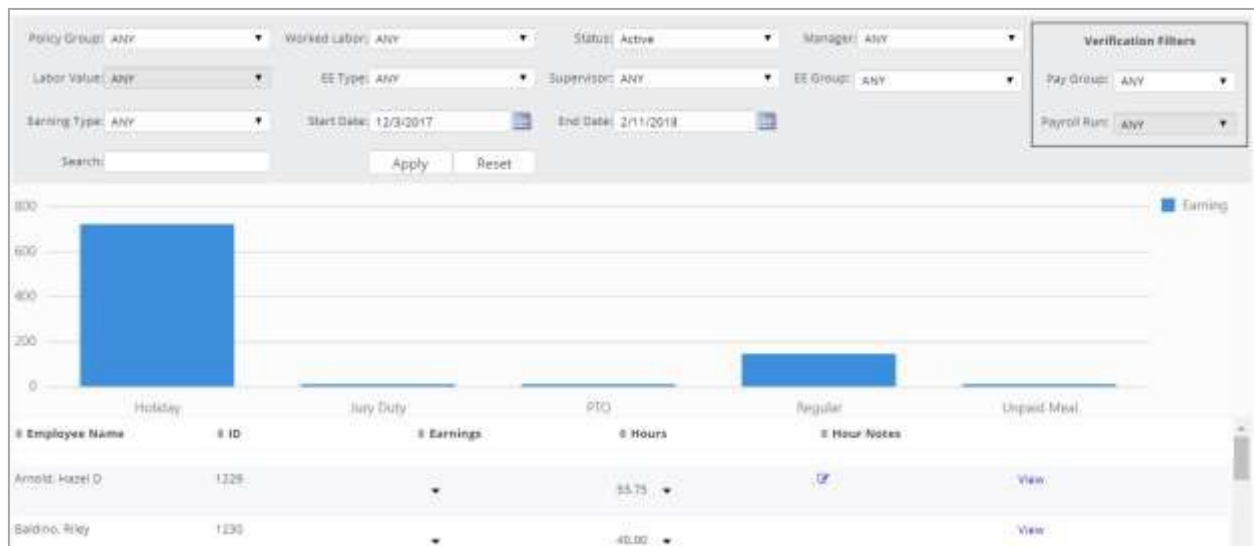
Scheduled vs. Worked Hours

Scheduled vs. Worked Hours allows you to see a bar graph of your employees scheduled hours vs. actual time worked. You will also see a charted version of the data. The first row in the chart shows you the details on their scheduled time. The second row shows you their actual details.



Earnings Summary of Hours

Earnings Summary of Hours allows you to view a report of your employees hours broken up by earning type. You can also verify all of your employee's timesheets on this screen.



The option to verify for a manager or supervisor appears in the top right corner of the filters. You can select a **Pay Group** and the **Payroll Run**. A Client user, Manger, and a Supervisor can verify Time Cards on this screen or see who has been verified.

Employee Clock Settings

The **Clock Settings** area in iSolved is used to configure clock specific behavior for each employee. This is only used by customers who are utilizing time clock hardware.

Date	Template Type	Number
------	---------------	--------

1. **Enable Biometrics:** requires employee to use the biometric reader on the time clock, when equipped properly

2. **Finger Template:** This setting controls the biometric reader setting for the employee at the time clock. The following options are available:
 - **Read:** Requires employee to use the biometric sensor to punch at the time clock.
 - **Read, but Always Accept:** Requires employee to use the biometric sensor to punch at the time clock, but does not perform validation on the biometric data.
 - **Do Not Read:** Does not require the employee to use the biometric reader to punch at the time clock.
 3. **Clock Password:** This setting creates a PIN number for the employee to use when accessing the time clock menus.
 4. **Clock Security:** This setting controls what level of access the employee has in the clock menu. The following options are available:
 - **Employee:** This user has access only to see punch records and accrual balances on clocks with those features.
 - **Team Leader:** This user has employee access and the ability to enroll biometric templates on clocks with those features.
 - **Supervisor:** This user has Team Leader access and the ability to enroll biometric templates on clocks with those features.
 - **Admin:** This user has full access to all clock menus.
 - **Inactive:** This user has no access to any clock menus.
 5. **Allow Door Access:** This setting controls if the employee can use the clock to open an electronically locked door when creating a punch.
 6. **Display Clock Message:** This setting controls if the employee will be presented with a clock message after punching using the time clock.
 7. **Lunch Restriction:** This setting controls if the employee is required to complete a specific number of minutes for their meal break before being allowed to punch back in from their meal. The available options are:
 - 60 Minutes
 - 45 Minutes
 - 30 Minutes
- Note:** This option does not work with all time clock hardware.
8. The **Biometric Templates** area is used when utilizing a biometric sensor equipped time clock. iSolved stores all biometric data on all enrolled employees, and those templates will show in this area.

Attendance Rules

The Attendance Rules help identify discrepancies in scheduled hours vs. worked hours. Once the Attendance Rules are created, they are then tied to the shifts.

Navigate to Client Management > Attendance Management > Attendance Rules. Add a new Rule Set, or edit an existing one.

1. Click on the **Add New Rule** icon to add a new rule within the set.

The screenshot shows a web form for creating an attendance rule. At the top, there are navigation buttons: 'Previous' (left arrow), 'Next' (right arrow, highlighted with a red box), 'Save' (floppy disk icon), and 'Cancel' (circular arrow icon). Below these are three main sections: 'Rule Name' with a text input containing 'In Early'; 'Rule Type' with a dropdown menu showing 'Choose a value...' and two options, 'Apply Shift Start' and 'Apply Shift End'; and 'Rule Preview' with a text input showing 'Rule In Early ({ruleType}):'. A red circle highlights a small icon next to the preview text.

2. Enter the desired **Rule Name**.
3. Select a **Rule Type** from the drop-down menu. The following options are available:
4. **Apply Shift End:** The alert will only be applied to the End Time of the shift.
5. **Apply Shift Start:** The alert will only be applied to the Start Time of the shift.
6. Select a **Process After** option from the drop-down menu. This will show the order of your current Rules, and allow you to select where this rule will fall in the process order.

7. Click on the **Next** icon to continue.

- The **From** and **To** fields allow you to create a window of time during which the alert will be applied. Both fields are in “hh:mm” format.
- Make a selection from the **Before or After** drop-down menu. The following options are available:
 - **Before** the Start Time of the shift.
 - **After** the Start Time of the shift.
- **Example:** The screen shot above shows an alert set up to apply from 40 minutes before the shift Start Time to 5 minutes before the shift Start Time. This results in a duration of 35 minutes to mark a punch with an “In Early” alert.
- The **Mark As** drop-down menu allows you to select from a list of pre-defined alerts. To view a list of pre-defined alerts, navigate to Client Management > Time Management > Alert Rules. Rules in this list must be checked, and applied to a Policy Group in order to take effect.
- The **Custom Alerts** drop-down menu allows you to select an alert that was created in the Client Management > Time Management > Custom Alerts section of the program. Go to **Alert Rules** to select the Custom Alerts to be applied to the Time Card.
- Select the **Based on Rounded Time** option if rounding is being used, and you would like to apply rounded punch times to this rule (as opposed to the employee’s actual punch times).

8. Click on the **Save** icon to add the rule to the system.

+ Add New Rule Edit Rules Reorder Rules	
Attendance Rules - Rules	
Rule Name	Rule Action
In Early	From 01:00 hrs before shift start to 00:01 hrs before shift start mark as in early Calculations will be based on unrounded time
In Late	From 00:01 hrs after shift start to 00:15 hrs after shift start mark as in late Calculations will be based on unrounded time
Out Early	From 00:15 hrs before shift end to 00:01 hrs before shift end mark as out early or {custom alert} Calculations will be based on unrounded time
Out Late	From 00:01 hrs after shift end to 00:15 hrs after shift end mark as out late or {custom alert} Calculations will be based on unrounded time

Manage Shifts

The Manage Shifts section of the program allows users to create shifts, which can then be assigned to multiple employees through the Scheduler. A shift defines the shift Shade and Text Color, Start/End times, Shift Durations, Attendance Rules, and Labor.

We have 3 types of shifts that can be created; Standard, Open, and Multi-Level Shifts.

Creating a Standard Shift

1. Click on the **Add New** icon to create a shift.
2. Enter the **Shift Name**.
3. Select the **Shade Color**. This color will be visible in the scheduler and on the Time Card.
4. Select the **Text Color**. This color will be visible in the scheduler and on the Time Card.
5. Specify a **Start Time** for the shift.
6. Specify an **End Time** for the shift.
7. The **Duration** will auto populate based on the **Start** and **End** times.
8. Specify a **Minimum** and **Maximum Duration**, if desired.
Note: Your under and over hours alerts are based on the hours amounts set in the minimum and maximum hours areas.
9. Apply an **Attendance Rule Set** from the drop-down menu.
10. Apply a **Meal/Break Rule** from the drop-down if desired. This option can reduce the meal duration from the scheduled hours when they display on the scheduler.
11. Use the **Labor** section to assign departmental and job/task information to the shift. If used, when the employee clocks in and out, their time will automatically be tied to these labor values.
12. Click on the **Save** icon at the top of the screen .

Once a shift has been created, the **Copy** icon can be used to create multiple shifts with similar settings.

Note: Labor specified here will be overridden by any Hours Allocation Rules with labor attached.

Open Shifts

Open Shifts allow you to create a schedule based on the number of hours the employee should work rather than the start and end times. These work great for scheduling salary or sales types of employees. They do not have to start at a specific time, but you would like to see them work a set number of hours.

The screenshot shows a web-based form for creating or editing a shift. At the top, there is a toolbar with icons for 'Add New', 'Edit', 'Delete', 'Refresh', 'Save', 'Cancel', and 'Copy'. The form is titled 'Shifts' and contains the following fields:

- * Shift Name: Sales Open 8 Hour Shift
- Is Active
- Is Open Shift
- Shade Color: [Color Picker]
- Text Color: [Color Picker]
- Sample: This is what it'll look like
- Duration: 8:00
- Minimum Duration: 8
- Maximum Duration: 8
- Attendance Rule: [Dropdown]
- Meal/Break Rule: [Dropdown]
- Scheduled Work Duration: 8:00
- Labor section:
 - Location: [Dropdown]
 - Department: [Dropdown]

1. Click on the **Add New** icon to create a shift.
2. Enter the **Shift Name**.
3. Put a check mark in the **is Open Shift** box.
4. Select the **Shade Color**. This color will be visible in the scheduler and on the Time Card.
5. Select the **Text Color**. This color will be visible in the scheduler and on the Time Card.
6. Put a check mark in the **is Open Shift** box.
7. Specify the **Duration** of the Open Shift.
8. Specify a **Minimum** and **Maximum** Duration, if desired.
9. Apply a **Meal/Break Rule** from the drop-down if desired. This option can reduce the meal duration from the scheduled hours when they display on the scheduler.
10. Use the **Labor** section to assign departmental and job/task information to the shift. If used, when the employee clocks in and out, their time will automatically be tied to these labor values.

Note: Labor specified here will be overridden by any Hours Allocation Rules with labor attached.

Multi-Level Shifts

Multi-Level Shifts are intended for use by employees who have the ability to choose between multiple shifts.

Example: The employee can choose between shifts beginning at 8 a.m., 9 a.m. or 10 a.m. When the employee clocks in, the system will automatically assign them to a shift for the day by relating the “IN” punch with the nearest shift start time.

	* Start Time	Cut-Off	End Time	* Shifts Duration	Scheduled Work Duration
1	07:00 AM	8:45 AM	04:00 PM	9:00	9:00
2	08:00 AM	9:45 AM	05:00 PM	9:00	9:00
3	09:00 AM	10:45 AM	06:00 PM	9:00	9:00

1. Click on the **Add New** icon to create a shift.
2. Enter the **Shift Name**.
3. Select the **Shade Color**. This color will be visible in the scheduler and on the Time Card.
4. Select the **Text Color**. This color will be visible in the scheduler and on the Time Card.
5. Click on the **Add New** icon to insert new shift times. For our example we want 3 shift lines so we would hit the button 2 times.
6. Specify a **Start Time** for the shift.
7. The **Cut-Off** time is the time at which the system stops looking for punches to be associated with this shift (based on the start time).
8. Specify an **End Time** for the shift.
9. The **Duration** will auto populate based on the Start and End times.
10. Specify a **Minimum** and **Maximum** Duration, if desired.
11. Apply an **Attendance Rule** Set from the drop-down menu.
12. Apply a **Meal/Break Rule** from the drop-down if desired. This option can reduce the meal duration from the scheduled hours when they display on the scheduler.
13. Use the **Labor** section to assign departmental and job/task information to the shift. If used, when the employee clocks in and out, their time will automatically be tied to these labor values.
14. Click on the **Save** icon at the top of the screen.

Note: Labor specified here will be overridden by any Hours Allocation Rules with labor attached.

Default Schedules

Default Schedules allow you to apply “Pattern Rules” (used for set rotating shifts) or “Weekly Rules” (used for more standard schedules like Monday-Friday).

Pattern Rule

Navigate to Client Management > Attendance Management > Schedule Rules.

In the example below, we will create a 14-day pattern/rotation where the employee works 2-2-3 working schedule.

1. Click on the **New Rule Set** option and enter a **Rule Set Name**.
2. Click on the **Save** icon.

3. Click on the **+ Add New Rule** option.
4. Enter a **Rule Name**.
5. Select a **Rule Type** from the drop-down menu.
6. Click on the **Next** icon to continue.

7. Enter the **Days in Pattern**.
8. Click on the **Next** icon.

9. Your Pattern will appear for you to start dropping shifts into place for each day.
Note: The effective date in the employee’s Default Schedule will act as “Day 1” in the pattern set.
10. Click on the **Next** icon.

Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7
7AM-4PM	7AM-4PM	No Shift	No Shift	8AM-5PM	8AM-5PM	8AM-5PM
Day 8	Day 9	Day 10	Day 11	Day 12	Day 13	Day 14
No Shift	No Shift	7AM-4PM	7AM-4PM	No Shift	No Shift	No Shift

11. Select a **Condition:**

- **Days in Date Range:** Should be used if you would like to set this Schedule Rule during a set period of time.
- **Employee Matches Labor Field:** Should be used if you want the system to look at the employee’s home labor fields to determine schedule.
- **None:** Should be used if this schedule should always be in place for the employee.

Note: If you build multiple shift rules, the precedence of the rule will decide the order of operation.

12. Click on the **Save** icon.

Weekly Rule

Navigate to Client Management > Attendance Management > Schedule Rules.

In the example below, we will create a 14-day pattern/rotation where the employee works 2-2-3 working schedule.

1. Click on the **New Rule Set** option and enter a **Rule Set Name**.
2. Click on the **Save** icon.

3. Click on the **+ Add New Rule** option.
4. Enter a **Rule Name**
5. Select a **Rule Type** from the drop-down menu.
6. Click on the **Next** icon.

7. Enter the **Days for the Week**.
8. Click on the **Next** icon.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
No Shift	7AM-4PM	7AM-4PM	7AM-4PM	7AM-4PM	7AM-4PM	No Shift

9. Select a **Condition:**

- **Days in Date Range:** Should be used if you would like to set this Schedule Rule during a set period of time.
- **Employee Matches Labor Field:** Should be used if you want the system to look at the employee’s home labor fields to determine schedule.

- **None:** Should be used if this schedule should always be in place for the employee.

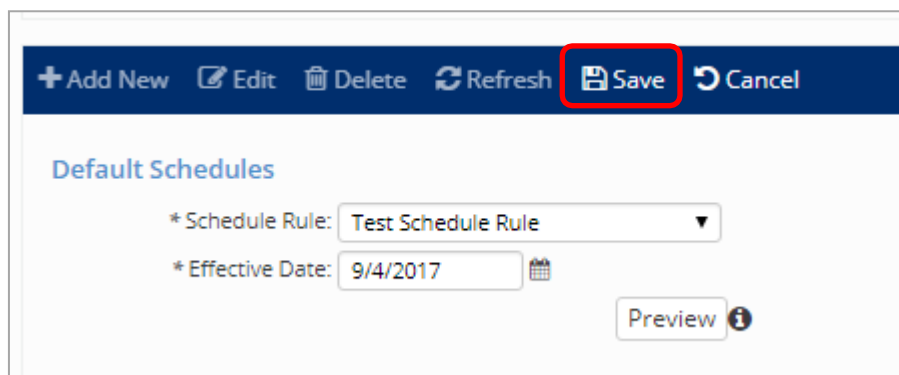
Note: If you build multiple shift rules, the precedence of the rule will decide the order of operation.

Applying the Default Schedule

Once you have built your Schedule Rules, use the following instructions to add the Default Schedule to employees.

Navigate to Employee Management > Employee Scheduling > Default Schedule.

1. Click on the **+ Add New** icon.
2. Select a **Schedule Rule** from the drop-down menu.
3. Enter an **Effective Date**.
4. Click on the **Save** icon.



5. **Preview** allows you to preview the “Employee Attendance” report (with run through the “Current Employee Attendance Report”) based on the Pay Period where the effective date resides, for only this employee assigned the Default Schedule Rule.

Employee Scheduler

The Scheduler section of the program allows you to assign shifts to the employees in the system or make edits/overrides to existing schedules for specific days.

Screen Layout

Navigate to Employee Self Service > Employee Scheduling > Scheduler.



- The filter options at the top of the screen allow you to narrow down the list of displayed employees. For example, if you would like to create schedules for employees assigned to a specific supervisor only, make the desired selection from the **Supervisor** drop-down menu. Once the desired filter options have been selected, click on the **Apply** icon to refresh the employee list.



- The Scheduler is displayed in table format. Employees are listed in the left-hand column. Multiple table views can be selected from the drop-down menus located to the right of the displayed date range.
 - **Hours:** To view a range of hours on the Scheduler table, make the desired selection from this drop-down menu. The available options are:
 - 12 Hours
 - 24 Hours
 - 48 Hours
 - 72 Hours
 - **Days:** To view a range of days on the Scheduler table, make the desired selection from the drop-down menu. The available options are:
 - 7 Days
 - 14 Days
 - 21 Days
 - 28 Days
 - 42 Days
 - **Month:** Click on this selection to view the Scheduler table in a standard 30-day month format.

The header at the top of the table shows the displayed date range, based on your view settings. Click on the **Back** and **Forward** icons to scroll through dates.

Creating Schedules

Scheduling a Single Shift

1. Select a cell on the grid next to the employee you wish to apply a schedule to.
2. Select from the list of pre-defined shifts.
3. Review **Shift Info**.
4. Select **Save**.

The following options appear under the **Scheduler** section:

- **Shift Name:** This field is where the shift that the user would like to assign to the schedule is selected. Once a selection has been made, the remaining field values will be automatically

populated with the default shift information.

- **Override Shift:** When enabled, clicking on this icon allows all fields to be editable so that the default shift parameters can be overridden.
- **Open Shift:** If this option is selected, the “Start Time” and “End Time” are removed from the shift. Only the “Duration” of a shift is required. This limits attendance alerts to “Unscheduled Absence,” “Under Hours” and “Over Hours.”
- **Start Time:** This is where the starting time for the employee’s schedule is set.
- **End Time:** This is where the ending time for the employee’s schedule is set.
- **Duration:** This field represents the length of the employee’s shift in “hours and decimals” format.
- **Required:** If the employee fails to work the minimum number of hours specified here, the system will generate an “Under Hours” alert (if enabled). This field is in “hours and decimals” format.
- **Maximum:** If the employee works, more than the number of hours specified here, the system will generate an “Over Hours” alert (if enabled). This field is in “hours and decimals” format.
- **Attendance Rule:** This field maps the attendance alert configuration to the shift.

Scheduling Multiple Shifts

If you need to add the same shift to employees for 5 days, you will simply click and drag with your mouse to highlight the dates you wish to place a schedule.

Mon 2/27	Tue 2/28	Wed 3/1	Thu 3/2	Fri 3/3

Once the dates are highlighted let, go of your mouse and the same scheduler options above will appear. The only difference is that you will be placing a schedule in all dates selected.

Schedule ✕

Employee Name: Cravens, Daniel C

Shift Name: Mid Shift

Create a Schedule for Each Day
 Create a Single Schedule

Selected Dates: 2/28/2016-3/02/2016

Override Shift

Open Shift

* Start Time: 11:00 AM

* End Time: 8:00 PM

* Duration: 9.00

Required: 4.00

Maximum: 10.00

Attendance Rule: Part-Time

Labor

Department:

Save
Cancel
Delete

1. Each shift that you have entered into the system is available for selection in the **Shift Name** drop-down menu.
2. Select the **Create a Schedule for Each Day** option to schedule the employee to work the selected shift on each day in the date range.
3. Select the **Create a Single Schedule** option to schedule the employee for one shiftspanning the days in the date range.
4. By default, all options displayed are pulled directly from the selected shift. To manually specify different shift settings, click on the **Override Shift** icon.
5. Click on the **Save** icon to add the shift to the employee's schedule.

Schedule Options

The header at the top of the **Scheduling** screen contains the following options:



1. If you have been copying/pasting schedules, the **Clear Clipboard** icon clears the shift information stored in the clipboard.
2. Click on the **Copy Schedules** icon to copy employee schedules from one date range forward to a specified range of dates.
3. Select the desired employees from the unselected box, and click on the arrow icon to move them to the selected box. To select multiple employees, hold down the {CTRL} or {SHIFT} key while clicking.
4. The following **Source** options are available:
 - **Use Current View Range:** The range currently displayed on the table is selected as the source range.
 - **Use Specified Range:** Select this option to manually specify the source using the Date Range fields.
5. In the **Destination** section, enter the range of dates that you would like to copy schedules in the Source range to.
6. **Overlap Options** allow you to specify how you would like the system to handle any overlapping schedules that may result from the copy action.
 - Select "By Day" or "By Shift" for **Overlap Type**. This selection works in conjunction with the Overlap Action option.
 - Under **Overlap Action**, select "Replace" to replace any existing shift with the shift being copied. Select "Skip" to skip any existing shift that is encountered, leaving the original shift in place.
7. Once you have specified copy options, click on the **Save** icon. The shifts are copied as defined.

Remove Schedules Option

The remove schedules option allows you to select employees and a date range that you wish to delete the schedule from.



Once the button is selected, you can choose the employee/s schedule you wish to remove and the date range.

Remove Schedules

Employee Selection:

Unselected

- Adams, Shane L.
- Baldino, Armando
- Bennett, Caprice C
- Crandall, Robert H
- Cravens, Daniel C
- Curl, Eric P
- Davis, Sammy D
- Gonzalez, Jose Garcia
- Gurney, Nanette
- Jha, Isha M
- Leopold, Amy
- Leopold, Matthew

>

<

Selected

- Adams, Mary P

Use Current View Range
 Use Specified Range

Date Range:

Weekly Schedule Report Option

This link generates a weekly schedule report based on the filtered results. This report will look similar to the scheduler's displayed results.



Scheduler	Sun 2/11	Mon 2/12	Tue 2/13	Wed 2/14	Thu 2/15	Fri 2/16	Sat 2/17	Hours	Days
Arnold, Hazel D								27.00	Total
Battina, Riley		8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM	8:00 AM - 5:00 PM		40.00	
Carlson, Raston		OTB 1 (7:00 AM - 3:00 PM)	OTB 1 (7:00 AM - 3:00 PM)	OTB 1 (7:00 AM - 3:00 PM)				24.00	
Castillo, Isaac A		OTB	OTB	OTB	OTB			36.00	
Clark, Daniel L									
Dawson, Henry P								45.00	
Overholt, Grayson H			Nights	Nights	Nights	Nights		60.00	
Garcia, Carla A									
Jones, Larr C								27.00	
Kendall, Audrey									
Kicks, Brooklyn M									
Total								210.00	
Grand Total								256.00	

Employee Options

Click on the ellipsis next to any employee's name to view employee-specific scheduling options.



This area allows you to:

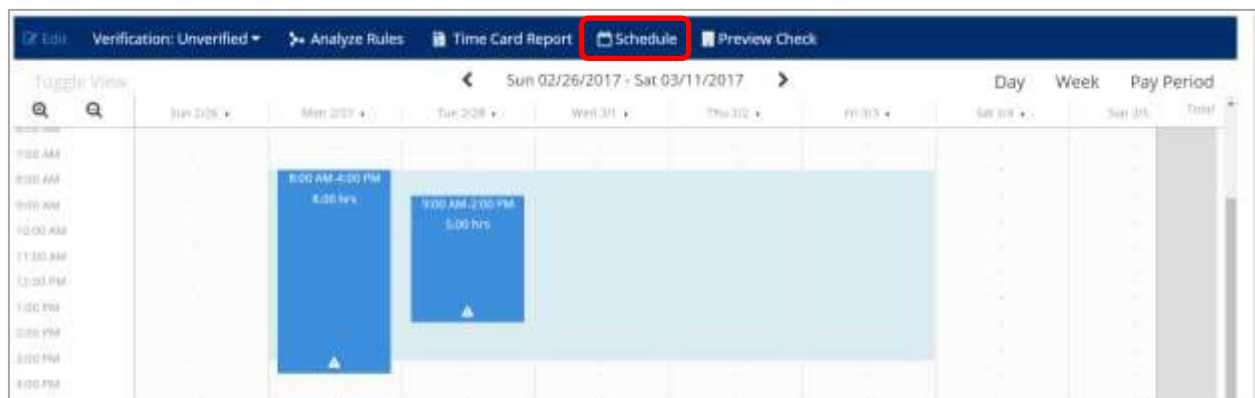
- Copy all schedules from the employee and paste them on another employee's schedule.
- Remove all schedules from the selected employee
- Custom Copy, which allows you to copy a schedule and paste it onto multiple employees schedule at once.

Schedule Totals

Scheduled hours for each employee are totaled in the column on the far right of the **Scheduler** table. Daily totals for all employees are displayed across the bottom of the **Scheduler** table.

Time Card View

Once schedules have been created, the employee's Time Card will display the employee's schedule. Visually, the schedule appears behind all time transactions that are entered, giving the user the ability to quickly see worked time vs. scheduled time



If you are using Attendance Rules in conjunction with your shifts, any alerts generated by discrepancies between employee schedules and the actual punches on their Time Card are displayed.

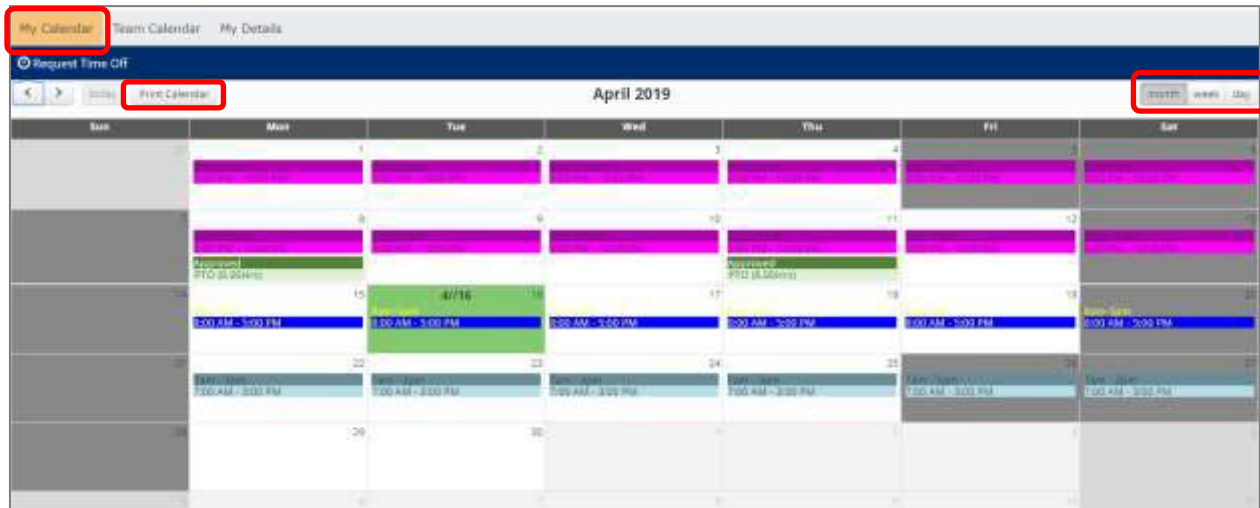
Click on the **Schedule** icon (highlighted in the above screen shot) to view a report of the employee's scheduled shifts.

1. Click on the **Team Report** icon to view a report detailing the Company Name, Employee Number, Timeclock ID, and Employee Name. Only display active employees based on their home organization values assigned to them under Employee Management > Employee Maintenance and **Organizations**. Only employees listed will be able to view the My Calendar and Team Calendar.

Team Report			
Report Generated on: 3/20/2016 9:27:39 AM			
Employees for Team: Default			
Company Name	Employee Number	Timeclock ID	Employee Name
Vandelay Industries	110	110	Able, John T
Vandelay Industries	101	101	Able, Mark T
Vandelay Industries	119	119	Brown, Charlie
Vandelay Industries	147		Brown, Jackson
Vandelay Industries	120	120	Cassano, Jody
Vandelay Industries	131		Cruiser, Wesley
Vandelay Industries	129		Cruiser, Edwin R
Vandelay Industries	126		Devine, Brandon
Vandelay Industries	128		Kirk, James T
Vandelay Industries	113	2222	Kelly, Mike
Vandelay Industries	106	106	Miller, Quinn J, JR
Vandelay Industries	127	1701	Pharrel, Jean-Luc

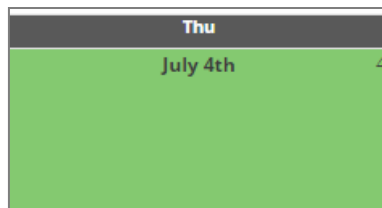
My Calendar

Now that the setup is complete, navigate to Employee Self-Service > Time > Time Off Request, and click on **My Calendar**. The calendar displays based on the setup selections.

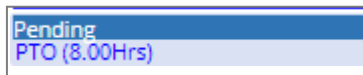


- Assigned shifts are displayed for each day the employee is scheduled. The following is displayed:
 - Shift Colors
 - Shift Name
 - Shift Start and End Times
 - “Manual,” “Overridden” and “Default” schedule assignments
 - If a shift has been overridden:
 - Instead of the shift name, the label “Overridden” is displayed.
 - The shift start and end times are displayed according to the override.
 - If a shift crosses midnight, the shift is displayed on the day based on the employee’s Policy Group setting “Apply Crossing Boundary To.”

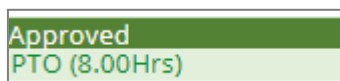
- If the boundary setting is set to “Start Time,” a symbol after the shift end time indicates that the shift crosses into the next day.
Example: 08:00 PM – 05:00 AM >>
 - If the boundary setting is set to “End Time,” a symbol appears before the shift start time to indicate that the shift crosses into the previous day.
Example: << 08:00 PM – 05:00 AM
 - If the boundary setting is set to “Split” or “Majority,” it is displayed as if it is set to the start time on the calendar.
Example: 08:00 PM – 05:00 AM >>
- Holidays are displayed based on employee assignment, and are shown with a **GREEN** background to match the **Time Card** screen.



- Black-out days are displayed according to employee assignment, and are shown with a **GREY** background.
- Shifts are displayed before “Pending” transactions.
- “Pending” transactions are displayed before “Approved” items.
- “Pending” transactions are displayed after “Holiday” names.
- “Approved” transactions are displayed after “Holidays” when no “Pending” transactions exist, and are shown with a **BLUE** background and white text.



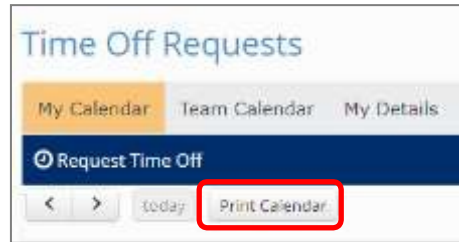
- The “Approved” transaction bar is **GREEN** with white text.



- **GREY** days/information not included in the month being displayed. “Pending” or “Approved” items will also be shown in **GREY** when outside of the current month date range.
- When clicking on a “Pending” or “Approved” item, navigate to the **My Details** tab for additional information. Highlight/select the item that was clicked on when **My Details** was loaded.
- Calendar days have a fixed minimum height and width, and will be uniform in size to all other days in the calendar.
- The current date is displayed in **YELLOW**, matching the **Time Card** screen.

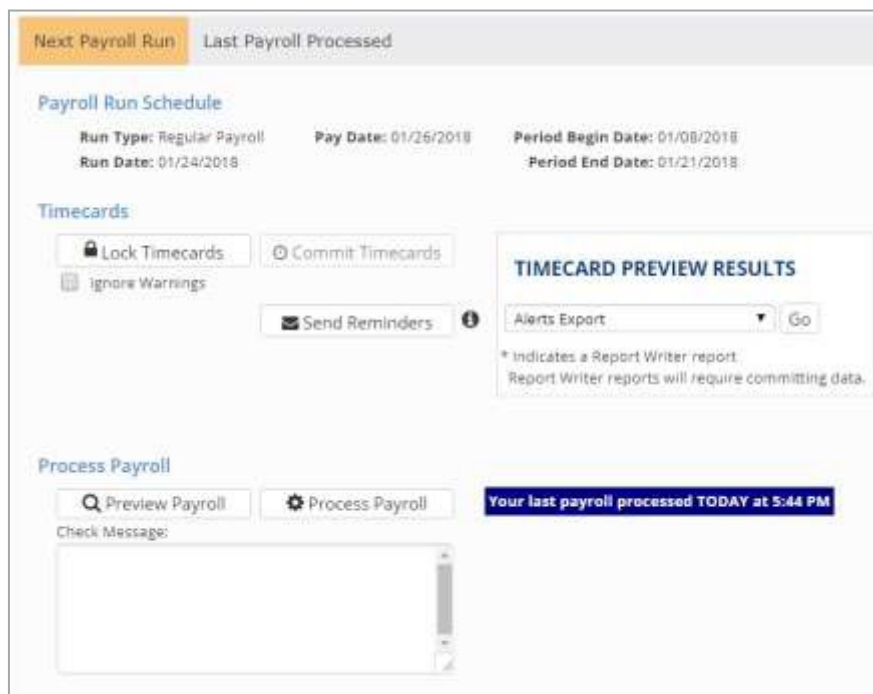


- The **Print Calendar** icon on the **My Calendar** screen allows you to print the displayed information (month/week/day views).



Close Pay Period

When using iSolved Time, a new process must be followed in order to transfer the Time Card data to the time entry grid, to preview payroll, and to process payroll. For convenience, a user is able to preview and process the payroll from the Close Pay Period area. Please follow the steps below to successfully run payroll.

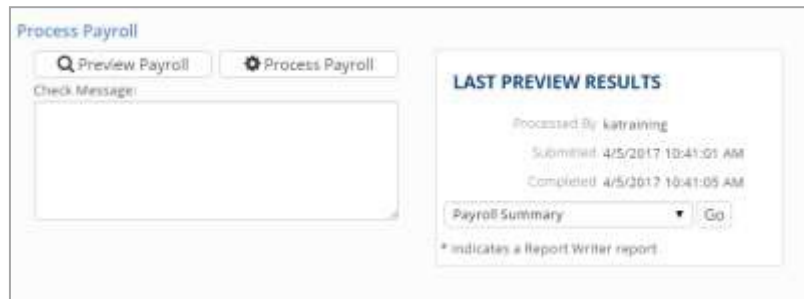


1. Run any reports for the current Time Card period by using the **Time Card Preview Results** area.
2. We recommend running the “Alerts Export” and “Verification Export” at a minimum before proceeding with payroll.

Note: The “Alerts Export” report shows any alert exceptions.

3. Under the **Time Cards** section, click on **Lock Time Cards**.
 - This option finalizes the Time Cards and prevents any further editing or data manipulation by employees managers and supervisors. Keep in mind that once locked Admin users can still edit Time Cards.
 - This process can be undone by clicking **Unlock Time Cards** as long as the Time Cards have not been committed.
4. Click on the **Commit Time Cards** button.

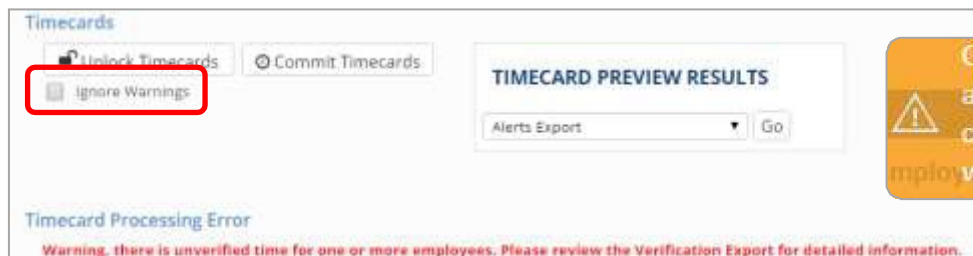
- This option transfers the hours from the Time Card section of iSolved to the Time Entry Grid.
 - This process can be undone by clicking **Uncommit Time Cards** as long as the payroll has not been processed.
5. **Send Reminders:** This option allows you to send an email and push notification to all employees who have not verified the employee level Time Card verification.
 6. Click on the **“Preview Payroll”** button.



7. Once the payroll preview has been run, you may run any reports for the payroll by using the **Last Preview Results** area on the right side.
8. Once any payroll reports have been verified, click on the **Process Payroll** button to finalize the payroll.

Once a payroll is processed, Time Cards may not be opened and edited without voiding the payroll. Any incorrect data should be adjusted in a future payroll once the checks have been generated.

Note: Alert Rules and Verification policies within iSolved have the ability to prevent payroll from being committed when configured in a specific way. When a Time Card alert or verification policy prevents a Time Card being committed, the user will see an error warning of such a condition (example below). The user then can either fix the condition that is preventing the commit process from completing, or can suppress the warning and move forward by clicking on the **Ignore Warnings** check box as shown below, then clicking on the **Commit Time Cards** button again. This should only be done with extreme caution as the warnings are there for a reason, and should only be bypassed by a user once sufficient research is done via the Verification Export and Alerts Export have been viewed.



Checking 'Ignore Warnings' will allow the Timecards to be committed even when there are warnings. Status: Active

