


January 2021

 **isolved™**

isolved | Time

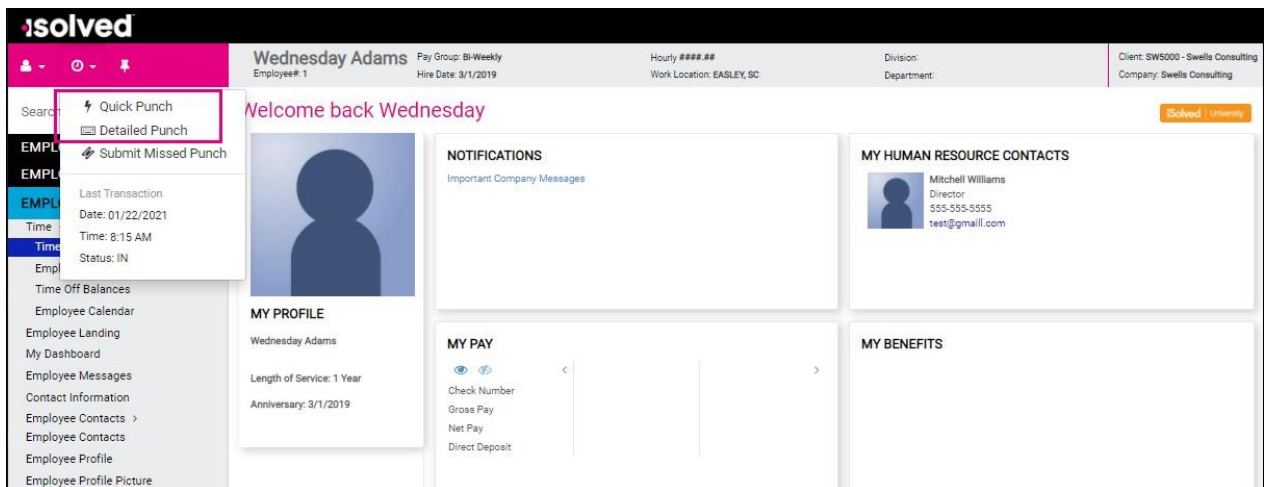
**Employee Guide**

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## Self Service Punching

Upon logging into isolved, an employee can immediately create a punch by using the employee self-service punch option location at the top left side of the page, as seen below. In this menu, a punch can be created via two different methods:



### Quick Punch

1. When a user clicks on the **Quick Punch** option, isolved will immediately create a punch for the current Punch date and time for the user, without the option to add punch notes or other punch options.
2. Once the punch is created, the user will see a confirmation at the top of the isolved page as shown above

### Detailed Punch

1. When a user clicks on the **Detailed Punch** option, isolved will open the punch creation area and display the current date and time to the user. Note that the date and time fields are not editable to any user utilizing self-service punching.
2. The punch options available in the detailed punch creating area is as follows:
  - **Type:** The type option allows the user to specify the punch type for the entry. The options are “Normal,” “Meal,” or “Break.”

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- **Mode:** The mode allows the user to specify if the punch is an “In Punch,” “Out Punch,” or “Auto.” isolved will default to “Auto,” which allows isolved to put the punches in the order in which they occurred on the TimeCard.
- **Labor:** If the option to enter labor allocations is enabled, the user can select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use the employee default labor allocation.



Time Card

The **Time Card** is located in the **Time** menu, allows employees to view the punches and hours on their Time Card in isolved. The hours detail for the different earnings types is located at the bottom of the Time Card in the ‘Earning Summary’ and “Labor Summary” areas.

The **Time Card** is the primary method users will use to enter punches and hours into isolved. The hours detail for the different earnings types is 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

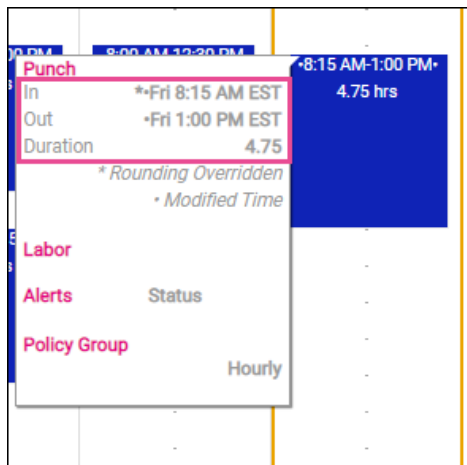
This symbol next to the date range on the Time Card, allows you to determine if the Time Card is in a locked or unlocked state. Locked means changes cannot be made, as payroll is in process or has been completed.

## 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.

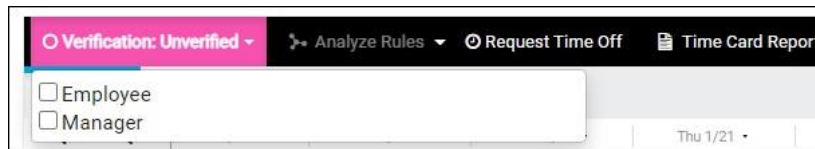


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Time Card Verification

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 show, and a user may click on the appropriate level using the mouse to verify the Time Card for that level.

Requesting Time Off

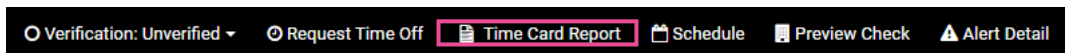
Users have the ability to submit a time off request from the time card screen, by selecting the request time off button on the blue action bar.



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.

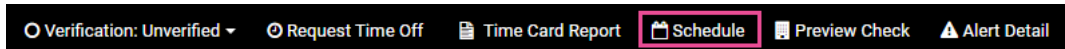
## Time Card Report

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.

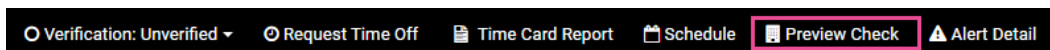


If you are using Attendance Rules in conjunction with your shifts, any alerts generated by discrepancies between employee schedules and the actual punches on their Time Card are displayed.

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 feature can be disabled on the Time Card Permissions Rule.



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Spreadsheet View

The Time Card Spreadsheet allows for a more data-centric method for editing hours and punch transactions. With the Time Card in edit mode, the view can be toggled between the standard “Calendar” and “Spreadsheet” views by clicking on the Spreadsheet button in the Time Card header. Use of the Spreadsheet does not require any additional Time Card Permissions.

Calendar	Start Date	Start	Mode	Type	Round	End Date	End	Mode	Type	Round	Hours	Pay Period
Sun	01/17/2021		Auto	Normal	Yes	01/17/2021		Auto	Normal	Yes	0.00	
Mon	01/18/2021	08:00 AM	Hour	Normal	No	01/18/2021	04:00 PM	Hour	Normal	No	8.00	
Tue	01/19/2021	08:00 AM	Hour	Normal	No	01/19/2021	12:00 PM	Hour	Normal	No	4.00	
Tue	01/19/2021	01:00 PM	Hour	Normal	No	01/19/2021	05:00 PM	Hour	Normal	No	4.00	
Wed	01/20/2021	08:00 AM	Hour	Normal	No	01/20/2021	12:00 PM	Hour	Normal	No	4.00	
Wed	01/20/2021	01:00 PM	Hour	Normal	No	01/20/2021	05:15 PM	Hour	Normal	No	4.25	
Thu	01/21/2021	08:00 AM	Hour	Normal	No	01/21/2021	12:30 PM	Hour	Normal	No	4.50	
Thu	01/21/2021	01:45 PM	Hour	Normal	No	01/21/2021	05:00 PM	Hour	Normal	No	3.25	
Fri	01/22/2021	08:15 AM	Auto	Normal	No	01/22/2021	01:00 PM	Auto	Normal	Yes	4.75	
Sat	01/23/2021		Auto	Normal	Yes	01/23/2021		Auto	Normal	Yes	0.00	

Navigate the cells of the spreadsheet using the mouse cursor, arrow keys, and {Tab} / {Shift} + {Tab} keys. Greyed out cells cannot currently be modified while in spreadsheet view. When you have finished modifying spreadsheet data, click on the Show Results button to return to the standard “Calendar” mode results screen.



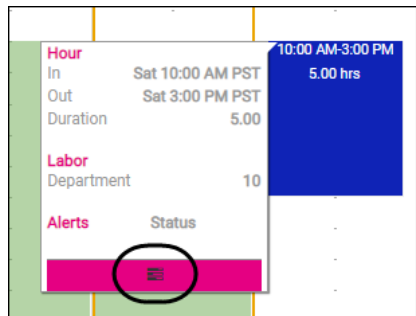
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When you have finished making edits to the spreadsheet, click on the **Show Results** button to apply the changes that you have made to the Time Card.

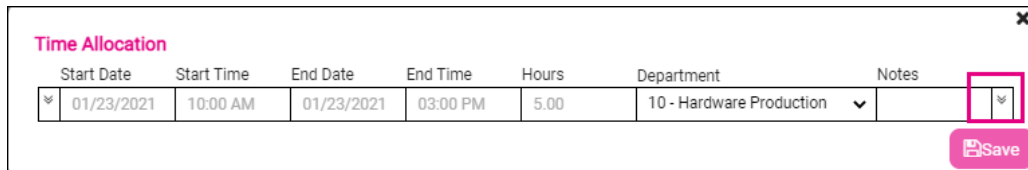
Time Allocation

Time Allocation allows you to allocate an hour segment to different labor values. The ability to use this feature is based on the Time Card Permissions associated with your Policy Group.

Access the Allocation Tool by clicking on the Allocation icon in the detail slide-out for an hour segment.



1. Add a new allocation line by clicking on the chevron icon.



2. After the allocation is saved, the hour detail slide-out will display the labor breakdown for that hour segment. The labor breakdown will also be shown in the main results summary on the Time Card.

Example Allocations:

Start Date	Start Time	End Date	End Time	Hrs	Labor 1	
01/02/2014	7:00 AM	01/02/2014	4:00 PM	9.00	Sales	User Clicks to insert new allocation record
01/02/2014	7:00 AM	01/02/2014	4:00 PM	9.00	Sales	End Time and Duration is unlocked to allow user to Edit. User cannot insert a date/time past the End Date/Time field or Before the Start Date/Time Field
01/02/2014	4:00 PM	01/02/2014	4:00 PM	0.00	Sales	
01/02/2014	7:00 AM	01/02/2014	12:00 PM	5.00	Sales	User Adjusts allocation for First Record
01/02/2014	12:00 PM	01/02/2014	4:00 PM	4.00	Service	Second Record Adjust based on the entry of First Record, user changes labor to new value
01/02/2014	7:00 AM	01/02/2014	12:00 PM	9.00	Sales	User Clicks to Add Allocation
01/02/2014	12:00 PM	01/02/2014	4:00 PM	4.00	Service	
01/02/2014	4:00 PM	01/02/2014	4:00 PM	0.00	Service	labor fields are defaulted to the previous rows values when new row is added
01/02/2014	7:00 AM	01/02/2014	12:00 PM	9.00	Sales	User Clicks to Delete This Allocation
01/02/2014	12:00 PM	01/02/2014	4:00 PM	4.00	Service	
01/02/2014	4:00 PM	01/02/2014	4:00 PM	0.00	Service	
01/02/2014	7:00 AM	01/02/2014	4:00 PM	9.00	Sales	Results from Deleting Allocation. End time for the record above the deleted becomes the End time of the Deleted Record
01/02/2014	4:00 PM	01/02/2014	4:00 PM	0.00	Service	
01/02/2014	7:00 AM	01/02/2014	12:00 PM	9.00	Sales	User Clicked to Allocate this Time Second
01/02/2014	12:00 PM	01/02/2014	12:00 PM	0.00	Sales	Trash cans for deletion only appear on records that may be removed, original record (1st Row) may not be removed through the allocation process
01/02/2014	12:00 PM	01/02/2014	4:00 PM	4.00	Service	
01/02/2014	4:00 PM	01/02/2014	4:00 PM	0.00	Service	User Clicked to Allocate this Time First

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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 > 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 > Time > Time off Balances.

**Time Off Balances**

**PTO Current Balance as of : 52.00**

Plan Details PTO	As of Last Pay Period End	Current Pay Period 10/25/2020 - 11/7/2020
Plan Year: Jan - Dec Award Schedule: Every Pay Accrual Rate: 3.0770 Last Award Date: Service Date: 9/15/1981 Length of Service: 39 Years, 4 Months (472 Months)	Accrued: 0.00 Taken: 0.00 YTD Accrued: 0.00 YTD Taken: 0.00  <b>Balance: 52.00</b>	Projected Accrued: 3.08 Projected Taken: 0.00 Projected YTD Accrued: 3.08 Projected YTD Taken: 0.00 Time Off Requests-Pending Approval: 0.00  <b>Projected Balance: 55.08</b>
	<b>Current Plan Year 11/8/2020 - 1/2/2021</b> Balance as of 11/8/2020: 55.08  Projected Accrued: 0.00 Time Off Requests-Approved: 0.00 Time Off Requests-Pending Approval: 0.00  <b>Projected Balance: 43.08</b>	<b>Next Plan Year 1/3/2021 - 12/18/2021</b> Carryover from Previous Plan Year: 40.00  Projected Accrued: 80.00 Time Off Requests-Approved: 0.00 Time Off Requests-Pending Approval: 0.00  <b>Projected Balance: 120.00</b>

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

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### Employee Calendar

The Employee Calendar area is used by an employee to enter a request for time off into isolved on behalf of the employee. 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 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 close pay period.

## Employee Calendar – View

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

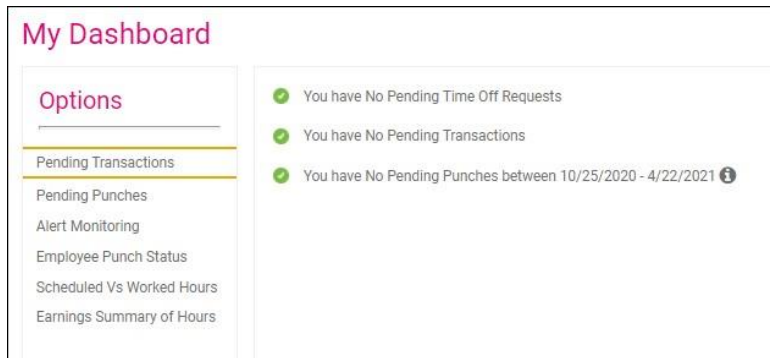
As you can see in the example, the absence name, approval status, number of hours per day, and the employee remaining balance are all displayed on the calendar, for the employee. The **My Absences** tab shows the absences in a list format and can be used to filter the list down to only absences within a specific window, absence type, or status.

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My Dashboard

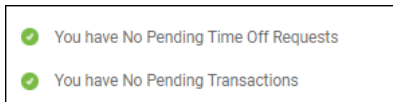
**My Dashboard** is designed to provide you with up-to-date information on your time and attendance information, conveniently provided in one screen. You can review pending transactions, monitor alerts, view punches statuses, see scheduled hours vs. worked hours, and view a summary of earnings for yourself.

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.



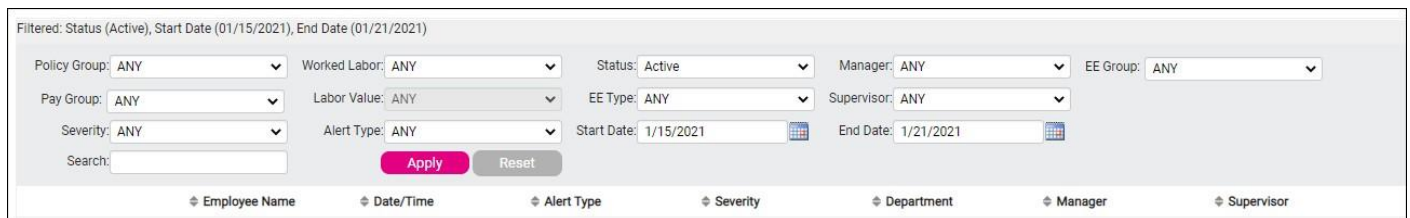
Pending Transactions

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**.



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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.

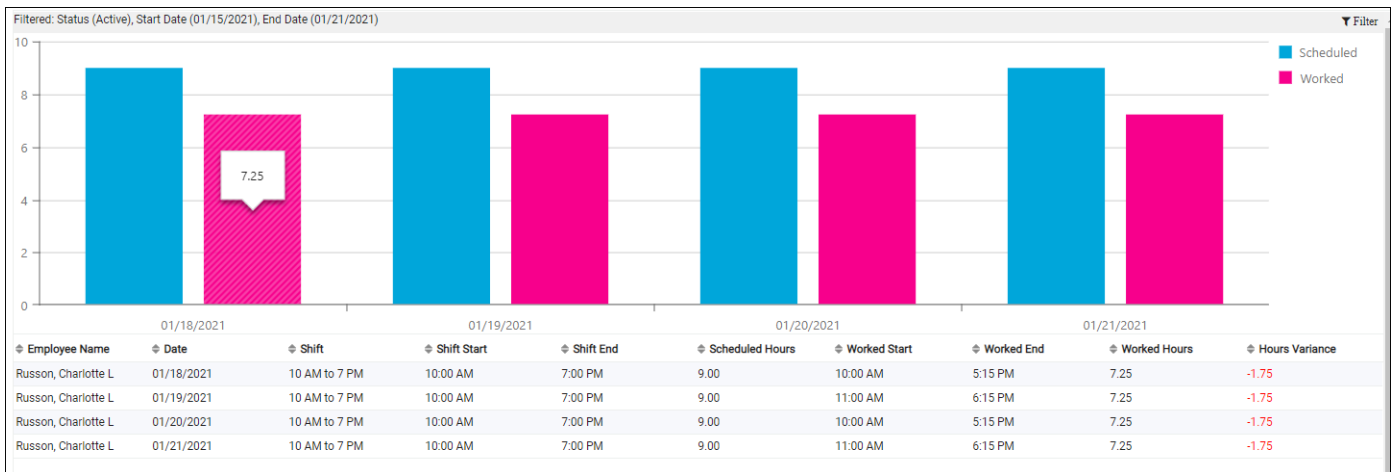
Filtered: Status (Active)

Policy Group: ANY | Worked Labor: ANY | Status: Active | Manager: ANY | EE Group: ANY  
 Pay Group: ANY | Labor Value: ANY | EE Type: ANY | Supervisor: ANY  
 Type: ANY | Mode: ANY  
 Search:  Apply Reset

Employee Name	Date/Time	Type	Mode	Department	Manager	Supervisor	
Russon, Charlotte L	01/01/2021 08:00 AM	Holiday	New Years Day		Smith, Noah L	Jones, Liam C	<a href="#">View</a>

Scheduled vs. Worked Hours

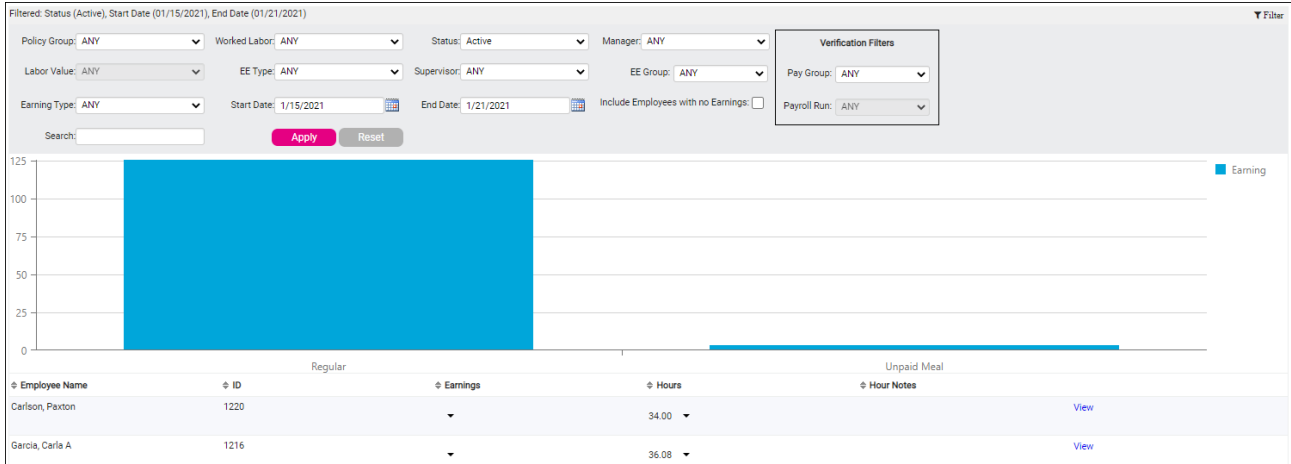
Scheduled vs. Worked Hours allows you to see a bar graph of your employees scheduled hours vs. actual time worked. You will also see a charted version of the data. The first row in the chart shows you the details on their scheduled time. The second row shows you their actual details.



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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.

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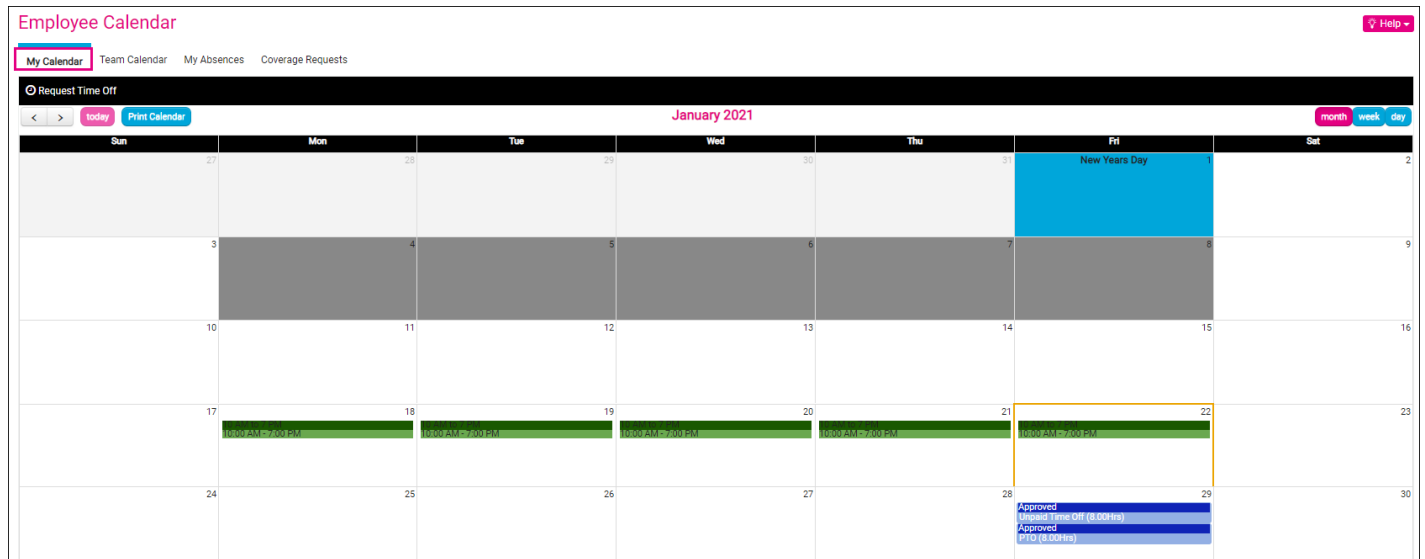
My Calendar and Team Calendar

This section reviews what is displayed to employees on the My Calendar and Team Calendar screens.

- MyCalendar allows the employee to view their schedules and absence requests.
- Team Calendar allows them to view their team’s accrual requests.

My Calendar

Navigate to Employee Self Service > Time > Employee Calendar, and click on the **My Calendar** tab.



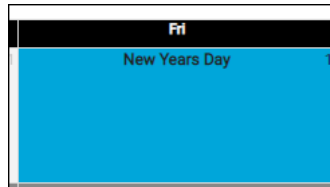
- Assigned shifts are displayed for each day the employee is scheduled. The following is displayed:
  - Shift Colors
  - Shift Name
  - Shift Start and End Times
  - “Manual,” “Overridden” and “Default” schedule assignments
  - If a shift has been overridden:
    - Instead of the shift name, the label “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 “ApplyCrossingBoundaryTo.”
    - 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 >>

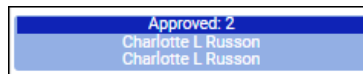
- Holidays are displayed based on employee assignment, and are shown with a **BLUE** background to match the **Time Card** screen.



- 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 **PINK** background and white text.



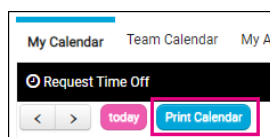
- The “Approved” transaction bar is **ROYAL BLUE** with white text.



- **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 highlighted in **GOLD**, matching the **Time Card** screen.



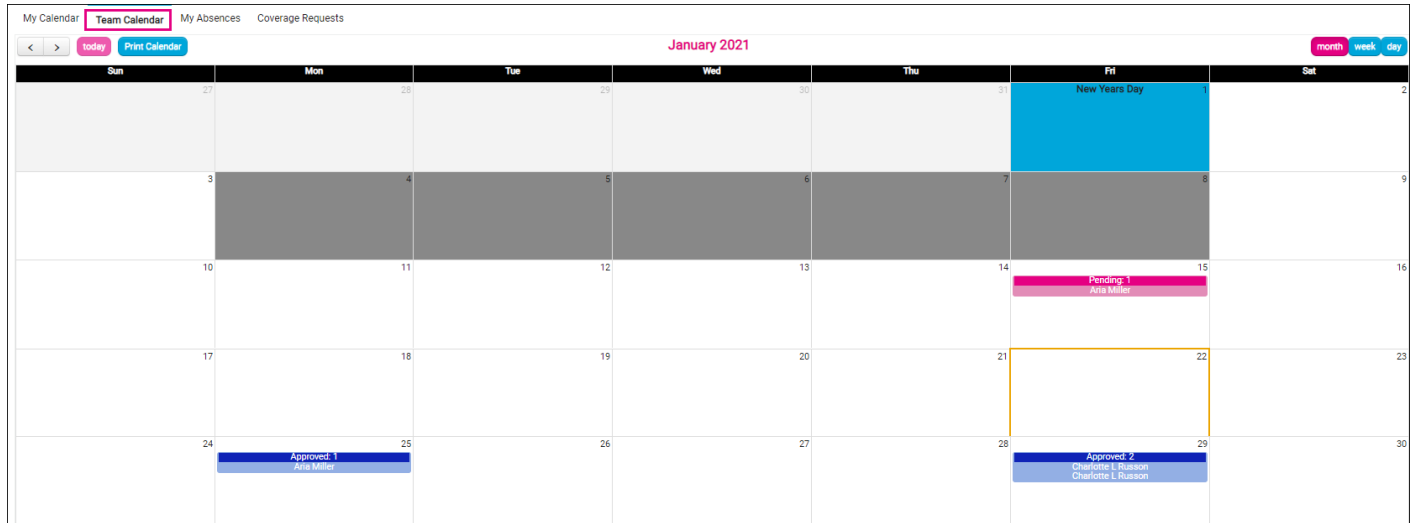
- The **Print Calendar** icon on the **My Calendar** screen allows you to print the displayed information (month/week/day views).



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Team Calendar

Click on the **Team Calendar** tab.



- Employee can view their team to see “Approved” and “Pending” accruals.
- The user must be a member of the team to see the team Time Off Requests.
- If the user is not a team member, the “Team Calendar” tab is not displayed.
- Holidays are displayed based on system Holidays, not employee Holiday assignments.

The following content is displayed based on “Calendar Rule” permissions:

- View Team Calendar
- Holidays
- Employee Names
- Absence Names
- Absence Hours
- Pending Absences

**Note:** Absence Notes are not displayed on the Team Calendar.