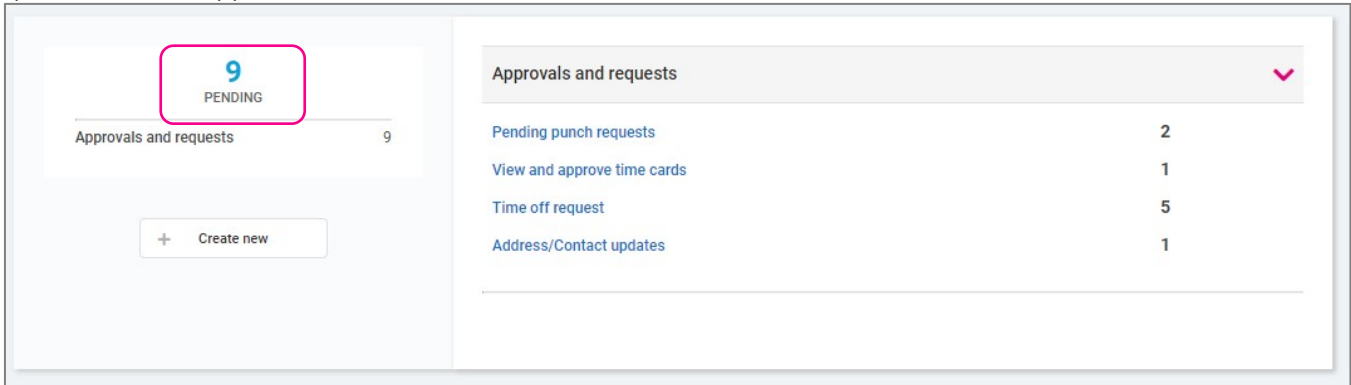


## Help Docs

### Manage > Tasks

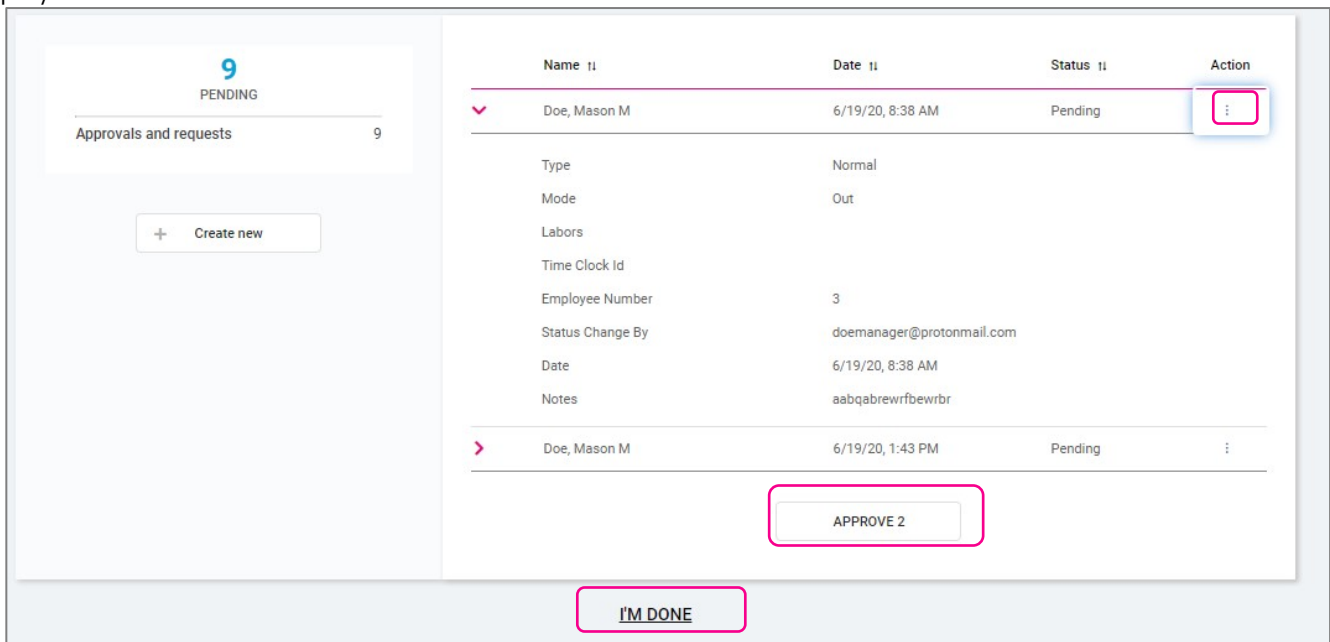
The Manage Tasks screen provides an overview of pending requests such as: punch requests, Time Card approval, time off requests and address/contact updates. Each link on this screen will expand to view details around the request and allow approval.



The total on the left-hand side of the screen considers all the approval and request counts on the right.

### Pending Punch Request

Once you click the Pending Punch Requests link any pending punch requests requiring your attention will be displayed.



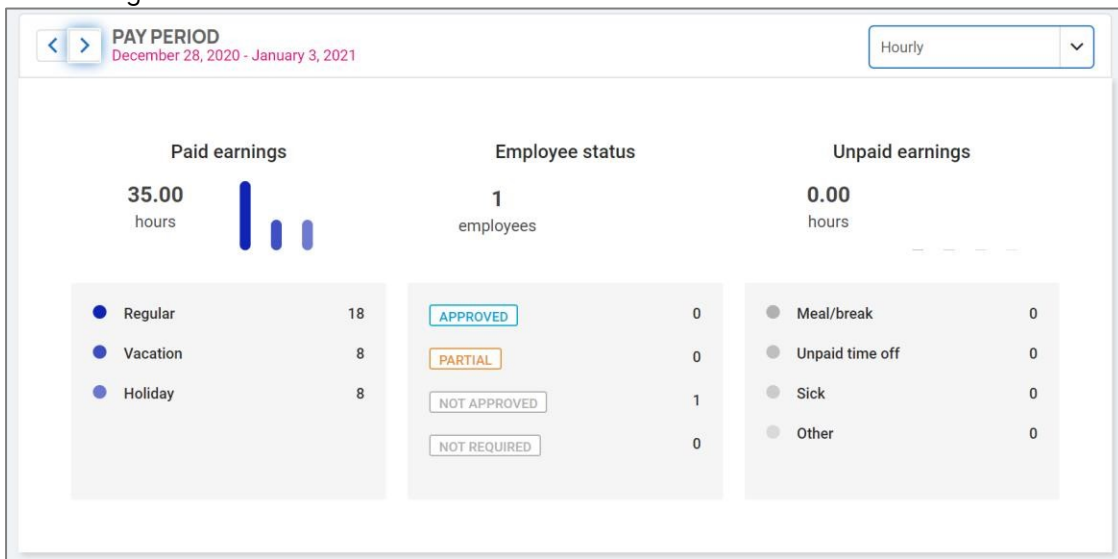
To approve or reject the request you can choose the > symbol to expand the request and review the details. Select the ⋮ symbol and you the option to **Approve** or **Reject** the request. If you have more than 1 pending punch request you can choose the Approve button at the bottom of the screen to approve all at the same time.

## Help Docs

Once you have completed the tasks, select Manage > Tasks and choose I'm Done at the bottom and you will be redirected back to the main screen.

## View and Approve Time Cards

Once you click the **View** and **Approve Time Cards** from the **Manage** screen link, the summary will display a graphical breakdown of all paid earnings, employee verification statuses and unpaid earnings for your employees. If you have employees in different pay periods you can select the drop-down in the right corner to change the pay period you are viewing.



All details from the graphs above are listed underneath with a place for you to review and verify.

- To verify, select the checkbox on the far-right side of the screen. You can also select the approve button at the bottom if you wish to approve all Time Cards at once.

Note: If an employee has outstanding critical Time Card errors, such as missing punches, it will not allow you to verify their time.

Employee	Total	Paid	Unpaid	Adj \$	Alerts	Timecard status	Your approval
Doe, Supervisor	0.00	0.00	0.00	0.00	⚠	NOT APPROVED	<input type="checkbox"/>

APPROVE 1

[I'M DONE](#)

## Help Docs

If you'd like to review an individual employee's time, select their name from the list and the Time Card data will populate.

Day	Total	Paid	Unpaid	Adj \$	Alerts
> Monday December 28	8.00	8.00	0.00	0.00	
> Tuesday December 29	10.00	10.00	0.00	0.00	
> Wednesday December 30	8.00	8.00	0.00	0.00	
Thursday December 31					
> Friday January 1	8.00	8.00	0.00	0.00	
Saturday January 2					
Sunday January 3					

### Time Card Review

A breakdown of the Earnings, Labor, Adjustments (mileage, bonus or reimbursements) as well as a summary of alerts are located on the left-hand side of the screen.

The default view of the Time Card is a spreadsheet view with expansion options. You can select the > icon next to the date to expand the details. When expanded, you can see actual punch times, total hours, and errors.

Day	Total	Paid	Unpaid	Adj \$
Monday December 28	8.00	8.00	0.00	0.00

Hours (recorded as punch) In 7:00 am

**4.00**

Modified time

Out 11:00 am

To view labor attached to punches choose the > icon in the lower right corner and the screen will expand.

Note: Labor will only display if outside of the employee's home value.

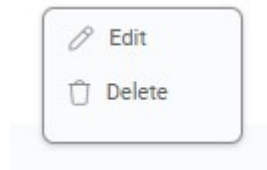
## Help Docs

Hours (recorded as punch)  In 7:00 am  
Modified time  
Out 11:00 am

Labor allocations  
Department 1

### Editing Records

To edit an existing record, expand the date choose the > icon in the lower right-hand corner and then choose the icon and you will have an option to **Edit** or **Delete**



When you select the **Edit** option, you will be prompted with an Edit Punch screen letting you choose which punch you are editing

EDIT PUNCH ✕

Which entry are you editing?

In 7:00 am

Out 11:00 am

CANCEL NEXT

- Select the punch you are wishing to edit and choose **Next**
- Make any adjustments you see fit
- Choose **Save**

Carlos Johnson

Punch date: 12/28/2020 Punch time: 07:00 AM

Type: Normal Mode: Auto

Do not round time

Labor Fields

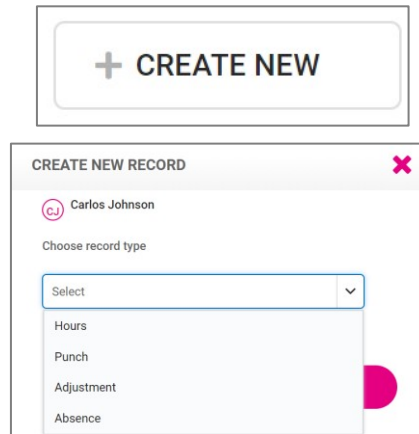
Notes: Notes

BACK SAVE

## Help Docs

### Adding Records > Hours

To add a new record to the employee Time Card, choose the **Create New** button in the top right-hand corner of the Time Card. You will be prompted to choose what type of record you are adding; Punch, Hour, Adjustment or Absence.



Once you have selected **Hour** in the create new record screen choose **Next** to fill out the hour details.

The form contains the following fields: Start date, Start time, End date, End time, Duration, Type (Normal), and Notes. At the bottom, there is a 'Labor Fields' section and two buttons: CANCEL and SAVE.

- Enter the **Start Date**
- Enter the **Start Time**
- Enter the **End Date**
- Enter the **End Time**
- The **Duration** will auto populate based on the start and end time
- **Type** allows you to specify if the hour type is Normal, Meal, and Break
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details.
- If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no **labor** is selected, isolved will use your default labor allocation
- Choose **Save** and the hour record will be added to the employee Time Card

Once you have selected **Punch** in the create new record screen choose **Next** to fill out the punch details.

The screenshot shows a form for creating a punch record. At the top, there are two input fields: 'Punch date' with the value '12/10/2020' and 'Punch time' with the value '08:38 PM'. Below these are two dropdown menus: 'Type' set to 'Normal' and 'Mode' set to 'Auto'. A checkbox labeled 'Do not round time' is located below the dropdowns. The form is divided into sections by horizontal lines. A section titled 'Labor Fields' in pink text is visible. Below this is a 'Notes' field with the placeholder text 'Notes'. At the bottom of the form are two buttons: a white 'BACK' button and a pink 'SAVE' button.

- Select the **Punch Date**
- Enter the **Punch Time**
- **Type**: allows you to specify the punch type for the entry. The options are Normal, Meal, and Break.
- **Mode**: allows you to specify if the punch is an IN, OUT, AUTO, or TRANSFER
  - a. IN means you are creating a punch in and is typically used when you the punch you are creating is the first in for the day or coming back from a break or meal
  - b. OUT means you are clocking out and is typically used when you the punch you are creating is for when the employee is leaving for the day or leaving for break or meal
  - c. AUTO allows the system to determine
  - d. TRANSFER is used to move from one labor value to another without having to create multiple punches. When using the transfer option isolved will create 2 punches; one clocking the employee out of their current labor and one clocking them into the labor transferred to.
- **Labor**: If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation.
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details
- Choose **Save** and the punch record will be added to the employee Time Card

## Help Docs

### Adding Records > Adjustments

Once you have selected **Adjustments** in the create new record screen choose **Next** to fill out the details.

**Note:** Adjustments are typically used (if enabled by your company) to enter mileage, bonus or reimbursements.

The screenshot shows a form for creating an adjustment record. It has the following fields and sections:

- Date:** A text input field.
- Adjustment:** A dropdown menu with "Select" as the current option.
- Type:** A dropdown menu with "Select" as the current option.
- Amount:** A text input field.
- Notes:** A text area.
- Labor Fields:** A section with a pink header, currently empty.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom.

- Enter the **Punch Date**
- Select the type of **Adjustment**
- Choose whether you are enter this adjustment as **Hours** or **Dollars** (there may only be 1 option based on your company setup)
- Enter the **Amount**
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details.
- **Labor:** If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation
- Choose **Save** and the adjustment record will be added to the employee Time Card

### Adding Records > Absences

Once you have selected **Absence** in the create new record screen choose **Next** to fill out the details.


The screenshot shows a form for creating an absence record. It has the following fields and sections:


- Policy:** A dropdown menu with "Vacation" as the current option.
- Date:** A text input field with "Select date" as a placeholder.
- Hours:** A text input field with "8.00" as the current value.
- Start time:** A text input field with "Select time" as a placeholder.
- AVAILABLE:** A box with "AVAILABLE" at the top, "--" in the middle, and "Hours" at the bottom.
- AFTER REQUEST:** A box with "AFTER REQUEST" at the top, "--" in the middle, and "Hours" at the bottom.
- Note:** A text area.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom.


## Help Docs




- Select the **Absence Policy**
- Enter the **Date** for the absence
- Enter the **Hours** amount being taken
- Choose the **Start Time** for the absence
- If the absence is tied to an accrual plan, the **Available Balance and Balance After Request** will populate
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details
- Choose **Save** and the absence will be added to the employee Time Card

### Reviewing/Excusing Alerts


Should an employee have an alert on their Time Card (missing meal, missed shift etc.) you can set the alert to **Reviewed** or **Excused** When viewing the employee Time Card you will see the color code  icon in the far-right side letting you know there is an alert pending your attention.

Day	Total	Paid	Unpaid	Adj \$	Alerts
> Monday December 7	0.00	0.00	0.00	0.00	

- To review or excuse choose the > icon to expand the date
- Select the  symbol and select **Edit**

Day	Total	Paid	Unpaid	Adj \$	Alerts
Monday December 7	0.00	0.00	0.00	0.00	
Missed Shift  8:00 AM <span>Edit</span>					
Unscheduled Absence  8:00 AM <span>⋮</span>					


- An edit alert popup will appear allowing you to set the Status and add any Notes


**EDIT ALERT** 

Date 12/7/2020

Time 8:00 AM

Alert Missed Shift

Severity  Low

Status Reviewed 

Notes

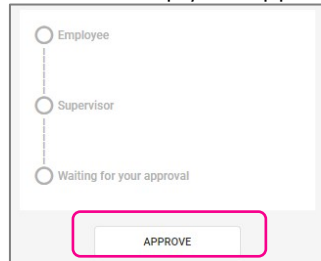
CANCEL SAVE



## Help Docs

### Verification

You can use the **Approve** button on the left side of the screen to approve once you have completed the review of their Time Card. Once approved it will date and time stamp your approval



Once you have verified the time, you can choose the I'm Done link at the bottom of the Time Card to be brought back to the **Manage > Tasks** screen.

**Note:** The system will not allow you to verify the Time Card if there are outstanding high or critical alerts pending your review and correction. Example: Missing Punch