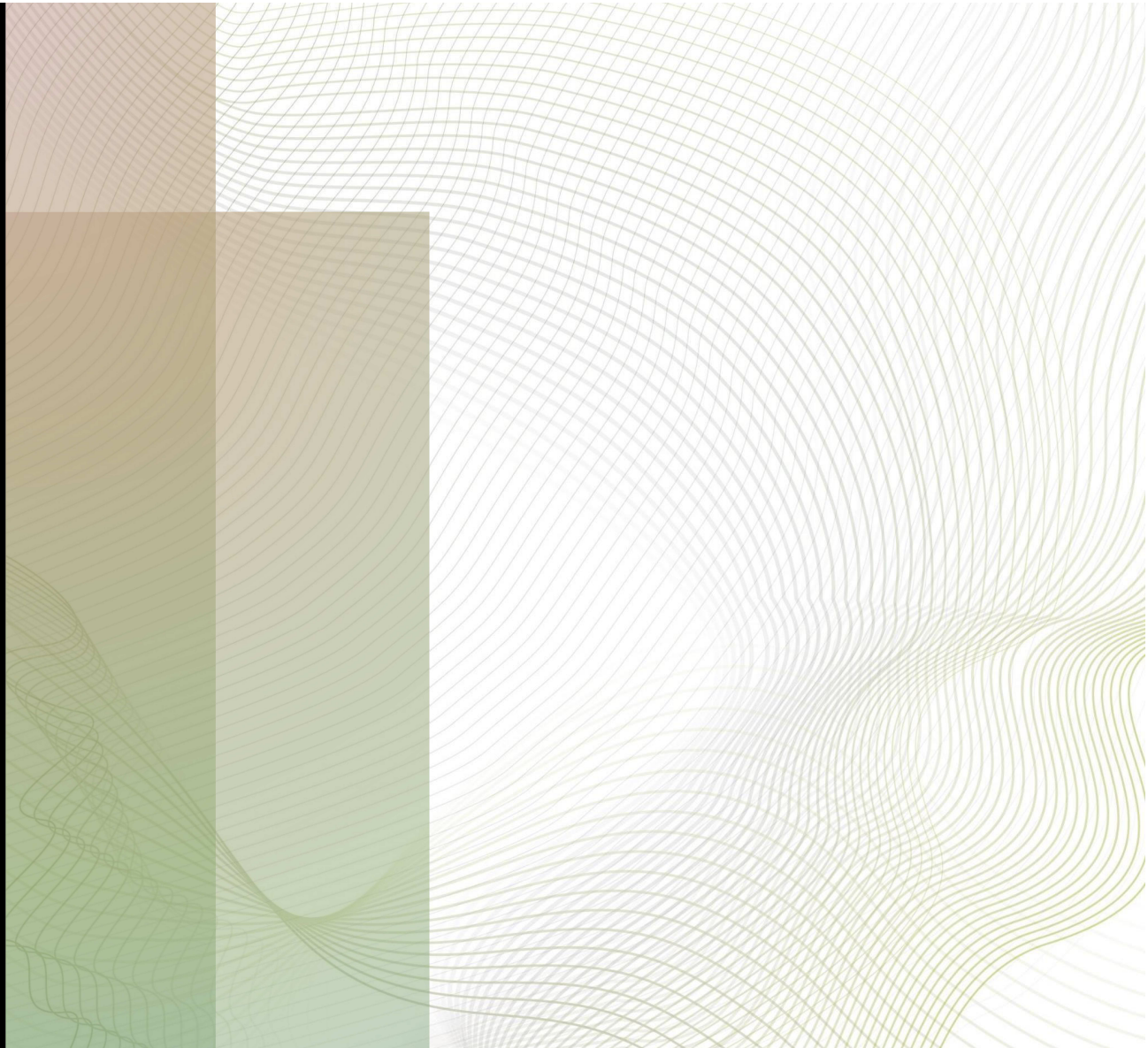


Time & Labor Management Series

Session I: Time
Reporting



Outline

- Exceptions & Points Management
- Missed Punches
- Preparing Time for Payroll
- Time/Points/Exceptions Reports
- Global Notifications

Exceptions

- Many types of exceptions can be tracked, but here are a few examples of the most common exceptions that clients are tracking:
 - Absences (unexcused/excused)
 - Long lunch break
 - Tardies
 - Out early
 - In early
 - Long shift
 - No lunch break
- Exception reports can be run to see who had no exceptions for a month to award a perfect attendance bonus or seeing who has repeatedly been tardy to grant points for poor attendance, setup a discussion with the employee, or make note for future performance coaching.

Points




- Points can be used to track various behaviors - both good and bad. Points could be awarded based on weekly perfect attendance or points could be given when an employee has an unexcused absence.
- Point reports can be run, as well as email notifications setup to notify you when an employee receives a point so that it can be addressed as needed.
- Rules for points can be set up to work off exceptions that an employee receives. For example, an employee can earn points for each unexcused absence.
- Points can be used in conjunction with incidents and/or performance coaching

Missed Punches

- Allows for quick access to viewing the missed punch and navigating to the timesheet to correct it.
 - Menu > Team tab > Time > Reports > Time Allocation > Missing Punches
 - Click on the Pencil to access the timesheet.

Page 1 of 1 | 1 - 3 of 3 Rows | Current: Default

Timesheet Dates: Last 7 Days | Columns (1) | Y2 | [Print] | [More]

Grouped By	Date	Start	End	Missed Punch	
Employee 4, Test, Employee	 07/10/2024		08:57a	-	Y
Employee 5, Test, Manager	 07/09/2024		07:45a	-	Y
Employee 13, Test, Employee2	 07/12/2024			02:45p	Y

Managing Exceptions/Points/Missed Punches

- Exceptions, points, and missed punches should be dealt with on (at minimum) a weekly basis, but it is recommended that exceptions and missed punches be handled daily.
 - Managers should be dealing with these items daily to ensure their teams' time entries are ready and accurate on the day that payroll is being processed.
 - APS' new dashboard experience makes it extremely quick and easy for managers to handle exceptions and missed punches as the reports are setup as widgets directly on the dashboard.
 - If you'd like to see a demo of APS' new dashboard experience, please use our Train to Thrive webpage link to access the 6/20/2024 recording of the dashboard demo.
 - APS' new dashboard experience also allows for admins to hold managers accountable, too, because managers/admins share the same Time dashboard tab... managers will only see their team members, but admins will be able to see all company employees* and can keep track of which employees have missed punches & exceptions that are not being corrected.
- *In general, admins typically have access to all company employees, but some admins may not have access to all company employees.

New Dashboard & Time Management

The dashboard interface includes a top navigation bar with the logo, time (09:55 AM EDT), and search. Below is a header with a welcome message and navigation tabs for Company Hub, My Info, Team Info, Time (highlighted), and Schedule. A descriptive paragraph explains the dashboard's purpose. Two main sections are highlighted with red rounded rectangles: 'Missing punches' and 'Timesheet Tasks'. The 'Missing punches' section contains a table with columns for Date, Start, End, and Missed Punch. The 'Timesheet Tasks' section shows a summary of pending tasks and open issues.

Missing punches

Grouped By	Date	Start	End	Missed Punch
Employee 4, Test, Employee	07/10/2024	08:57a	-	Y
Employee 13, Test, Employee2	07/12/2024	-	02:45p	Y

Timesheet Tasks

- 3 pending tasks left in previous pay period
- Current pay period (4)
- Open issues: 2 Missing punches
- Timesheet approval: 2 Not submitted

New Dashboard & Time Management

The dashboard features a top navigation bar with the APB logo, the time 10:09 AM (EDT), a search bar, and notification icons. Below the navigation bar is a filter bar for 'Time' with a settings icon. The main content area is divided into several sections:

- Table 1:** A table with columns: Grouped By, Date, Start, End, Missed Punch, and IT. It contains two rows of data for employees 4 and 13.
- Summary Widgets:** Two widgets on the right side: 'Current pay period (4)' with 'Open issues' (2 Missing punches) and 'Timesheet approval' (2 Not submitted).
- Exceptions:** A widget on the bottom left showing a list of exceptions for employees 4 and 13, including 'LEFT EARLY' and 'TARDY'.
- Timesheets (Current):** A widget on the bottom right showing a table of current timesheets for employees 4 and 13, including raw hours and a page total of 88.52.

Grouped By	Date	Start	End	Missed Punch	IT
Employee 4, Test, Employee	07/10/2024	08:57a	-	Y	
Employee 13, Test, Employee2	07/12/2024	-	02:45p	Y	

Abbreviation	Date	Actions
Employee 4, Test, Employee		...
LEFT EARLY	07/15/2024	...
TARDY	07/17/2024	...
Employee 13, Test, Employee2		...
LEFT EARLY	07/16/2024	...

Permission	Approval State	Employee Id	First Name	Last Name	Raw Hours	# Records
Approve	Open	4	Test	Employee	45.00	
Approve	Open	13	Test	Employee2	43.52	
Page Total					88.52	

Reports

If you cannot find the report using the menu pathing, please let us know and we will assist you with getting access

- Timesheets: Time > Timesheets > All Timesheets > Current
- **Pending Change Requests: Time > Timesheets > Pending Timesheet Change Requests**
- Exceptions: Time > Reports > Time Allocation > Exceptions
- Exception Entries: Time > Reports > Audit Trail > Exception Entries
- **Exception Summary by Week: Time > Reports > Time Allocation > Exceptions Summary by Week**
- **Points: Time > Points > Balances**
- Detailed Points: Time > Reports > Points > Detailed Points Report
- Points History: Time > Reports > Points > Points History Report
- Missing Punches: Time > Reports > Time Allocation > Missing Punches

Global Notifications

- Email notifications can be set up as reminders for managers to review and correct timesheets as needed
- Points
 - Sends a notification when an employee accrues or loses points.
 - Notifications can also include the points balance and/or point accrual history, too.
- Exceptions
 - Sends a notification when an exception is created on a timesheet.
- Manager Made Changes
 - Sends a notification when a manager has made a timesheet change.
- Timesheets identified with Preprocessing Errors
 - Sends a notification if a timesheet rule would create a warning/error during submission/approval
- Manager Timesheet Review
 - Can have daily or end-of-pay period reminders to review and/or approve timesheets