ATTENTION

Please be aware that this guide is a preliminary guide and information contained herein most likely will change as your implementation progresses. Revised versions will be periodically released until a final guide is distributed at the end of the software implementation process.

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# TABLE OF CONTENTS

## CHAPTER 1 — GETTING STARTED ................................................................. 9  
  1.1 What is EmpowerTime™? ................................................................. 9  
  1.2 What Are the Components of EmpowerTime? ................................. 9  
    Data-Collection Devices and Programs ............................................. 9  
    Client Access Modules .................................................................... 10  
    Interface and Integration Modules .................................................... 10  
    Other Modules .................................................................................. 11  
  1.3 Hardware and Software Requirements ............................................. 11  
  1.4 Product Installation and Upgrades ................................................... 12  
  1.5 EmpowerTime Configuration Procedures ....................................... 12  
    System Configuration Checklist ....................................................... 12  
  1.6 Using This Guide ............................................................................. 13  
  1.7 Sample Data .................................................................................... 14  
  1.8 Empower Technical Support ........................................................... 14  

## CHAPTER 2 — NAVIGATING THE SYSTEM ..................................................... 15  
  2.1 Logging In ......................................................................................... 15  
  2.2 EmpowerTime Workflow ................................................................ 16  
  2.3 Main Screen Drop-Down Menus ....................................................... 16  
  2.4 Navigation Pane ............................................................................... 21  
  2.5 Status Bar ......................................................................................... 22  
  2.6 Buttons and Shortcuts .......................................................... 23  
    Navigation Toolbar and Function Buttons ........................................ 23  
    Drop-Down Lists ............................................................................. 23  
    Right Mouse Button ....................................................................... 24  
    Keyboard Shortcuts ........................................................................ 24  
    Column Filters ................................................................................. 25  

## CHAPTER 3 — COMPANY SETUP ................................................................. 26  
  3.1 Overview ......................................................................................... 26  
  3.2 Creating a Company .......................................................... 26  
  3.3 Defining Pay Periods .......................................................... 27  
  3.4 System Options 1 ........................................................................... 28  
  3.5 System Options 2 ........................................................................... 32  
  3.6 Defining Organization Levels .................................................. 36  
    Adding and Editing Organization Levels ........................................... 36  
    Swapping Organization Levels ......................................................... 37  
    Deleting an Organization Level ........................................................ 38  

## CHAPTER 4 — CODE TABLES ................................................................. 39  
  4.1 Overview ......................................................................................... 39  
  4.2 Organization Level Codes .............................................................. 39  
  4.3 Job Codes ....................................................................................... 40  
  4.4 Shift Codes .................................................................................... 41  
  4.5 Absence Reason Codes ................................................................... 42  
  4.6 Audit Reason Codes ....................................................................... 43  
  4.7 Clock Supervisor Codes ................................................................. 43  

## CHAPTER 5 — PAY TYPES AND PAY TYPE GROUPS .................................. 45  
  5.1 Overview ......................................................................................... 45  
  5.2 Defining Pay Types ......................................................................... 45
10.2 Creating Attendance Plans......................................................... 117
  Qualifiers.................................................................................. 117
10.3 Enrolling Employees in Plans and Defining Balances................................. 119
  Manually Enrolling Employees in Attendance Plans.......................... 119
  Mass Adding Attendance Plans and Balances.................................. 121
10.4 Using Attendance Plans................................................................ 122
10.5 Overriding Attendance Policies.................................................. 124
10.6 Moving Attendance Transactions to the Historian.............................. 125

CHAPTER 11—USER SETUP.................................................................. 126
11.1 Overview ................................................................................. 126
11.2 Creating and Copying User IDs.................................................. 126
11.3 Defining Menu Styles............................................................... 129
  Organizer IDs............................................................................. 129
  Supervisor Menu IDs................................................................. 129
11.4 Defining Permissions in User Setup.............................................. 130
11.5 Filters and Custom Queries....................................................... 132
  Employee Filters....................................................................... 133
  Labor Filters.............................................................................. 133
  Company Filters........................................................................ 134
  Custom Queries......................................................................... 135
11.6 Workflow Configuration............................................................. 136
11.7 Security Templates..................................................................... 136

CHAPTER 12—EMPLOYEE SETUP.......................................................... 138
12.1 Overview ................................................................................. 138
12.2 Drop-Down Menu Options......................................................... 139
12.3 Creating and Navigating Between Employee Records...................... 140
12.4 Main Screen............................................................................ 142
12.5 Time Attendance Screen......................................................... 146
12.6 Schedule Screen...................................................................... 149
12.7 Secondary Job Screen.............................................................. 150
12.8 Timecard Screen..................................................................... 153
12.9 Notes Screen........................................................................... 154
12.10 Attendance Screen................................................................. 155
12.11 Changing Employee IDs......................................................... 155
12.12 Changing Badge Numbers...................................................... 156
12.13 Mass Updates........................................................................ 156
12.14 Mass Add Punch..................................................................... 157
12.15 Mass Add Pay Records........................................................... 159
  Creating Employee Templates..................................................... 161

CHAPTER 13—CHAPTER 13—SCHEDULES AND SCHEDULE TEMPLATES 162
13.1 Overview ................................................................................. 162
13.2 Scheduling Methods.................................................................. 162
13.3 Schedule Templates and Template Overrides................................ 163
  Creating Schedule Templates...................................................... 163
  Schedule Template Details.......................................................... 164
  Schedule Template Overrides...................................................... 165
13.4 Assigning Employees to Templates.............................................. 168
  Fixed Schedules......................................................................... 168
  Flex Schedules and Rotating Schedules....................................... 169
CHAPTER 14—CHAPTER 14—TIMECARDS, PAY RECORDS, AND APPROVALS ........................................178
14.1 Overview .................................................................................................................. 178
14.2 Timecards ................................................................................................................ 178
   Punch Color Definitions ......................................................................................... 179
   Punch Type Definitions ....................................................................................... 181
   Timecard Action Buttons ................................................................................... 183
14.3 Editing Timecards and Correcting Missing Punches ................................................. 191
   Correcting Missing Punches .............................................................................. 191
   Editing Punches ............................................................................................... 191
   Creating Punches ............................................................................................ 193
   Deleting Punches ............................................................................................. 193
   Missing Punch Edit Utility ............................................................................. 193
14.4 Pay Records ........................................................................................................... 193
14.5 Multilevel Review and Approvals .......................................................................... 196
CHAPTER 15—CHAPTER 15—TIME OFF REQUESTS .....................................................198
15.1 Overview .................................................................................................................. 198
15.2 Standard Time Off Request Features ..................................................................... 198
15.3 Assigning Employees to Supervisors .................................................................... 198
15.4 Employees Workgroups ........................................................................................ 199
   Workgroup ...................................................................................................... 200
   TOR Settings .................................................................................................. 200
   E-Mail Settings ............................................................................................... 201
   Workgroup Warning Levels ........................................................................... 201
15.5 Running Reports .................................................................................................... 203
CHAPTER 16—CHAPTER 16—EMPOWERTIME REPORTS ......................................... 205
16.1 Overview .................................................................................................................. 205
16.2 Running Reports .................................................................................................... 205
16.3 Favorite Reports .................................................................................................... 208
16.4 Print Options ......................................................................................................... 210
16.5 Saving Report Settings ........................................................................................ 211
16.6 Report Archive Reader ......................................................................................... 212
16.7 Sample Reports ..................................................................................................... 214
   Attendance Report .......................................................................................... 214
   Employee Approvals Report .......................................................................... 215
   Daily Activity Report ....................................................................................... 216
   Daily Utilization Report .................................................................................. 217
   Hours Worked Detail Report ........................................................................ 218
   Hours Worked Simplified Report ................................................................. 219
   Hours Worked Summary Report ................................................................ 220
   Roll Call Report .............................................................................................. 221
   Timecard Report .............................................................................................. 222
   Timecard Transfers Report ........................................................................... 223
CHAPTER 17 — DAILY AND END-OF-PAY-PERIOD ACTIVITIES ............................................ 240
17.1 Overview ................................................................................................................. 240
17.2 Daily Activities ........................................................................................................ 240
  Workflow and Tasks Bar ............................................................................................... 240
  KPIs .............................................................................................................................. 241
  Message Center .......................................................................................................... 242
  Attendance Calendar .................................................................................................. 243
  Adding and Updating Employee Records ..................................................................... 243
  Polling Time Clocks .................................................................................................... 244
  Posting Punches ......................................................................................................... 244
  Identifying and Correcting Missing Punches ............................................................... 245
  Adding Pay Records ................................................................................................... 245
  Printing and Reviewing Reports ................................................................................... 245
  Summary ....................................................................................................................... 246
17.3 End-of-Pay-Period Activities .................................................................................. 246
  Daily Activities ........................................................................................................... 246
  Reviewing Reports and Making Corrections ............................................................... 247
  Approving Employees’ Hours ...................................................................................... 247
  Exporting Data to Payroll ............................................................................................ 248
  Backing Up Data ......................................................................................................... 248
  Closing the Pay Period ............................................................................................... 248
17.4 Closing a Pay Period ............................................................................................... 249

CHAPTER 18 — HISTORICAL DATA AND REPORTS ...................................................... 254
18.1 Overview ................................................................................................................. 254
18.2 Browsing Historical Data ....................................................................................... 254
  Timecard History ........................................................................................................ 255
  Payroll History ........................................................................................................... 256
  Exceptions History ..................................................................................................... 256
  Attendance History .................................................................................................... 257
18.3 Purging Data from the Historian ............................................................................. 258
18.4 History Reports ....................................................................................................... 259
  Running Reports ......................................................................................................... 259

CHAPTER 19 — SYSTEM UTILITIES ............................................................................. 260
19.1 Overview ................................................................................................................. 260
CHAPTER 1—GETTING STARTED

1.1 What is EmpowerTime™?

The EmpowerTime Automated Timekeeping System is a fully automated workforce management system.

EmpowerTime processes employees’ punches and pay records based on customized rules in order to calculate total pay period hours. EmpowerTime also records exceptions such as tardies, absences, and breaks that are too long so that supervisors can more accurately monitor employees’ work activities. Supervisors can review daily and weekly hours on the screen or by running reports, and corrections are made to employees’ records as necessary. At the end of the pay period, a payroll file is created by EmpowerTime and exported to payroll. By automating the timekeeping process, EmpowerTime saves clerical time, eliminates errors in payroll preparation, and provides a valuable set of labor management tools.

EmpowerTime can be customized to meet almost any employment policies. In addition, the intuitive design of EmpowerTime allows adjustments to be made as employment policies change, making EmpowerTime an investment that will last for many years to come.

1.2 What Are the Components of EmpowerTime?

EmpowerTime includes two primary components: the Time and Attendance component and the Historian. The Time and Attendance component contains employee records, rule settings, and current pay period data, while the Historian contains data from previous pay periods. However, most EmpowerTime solutions include several additional components such as time clock devices and software modules for integrating with other business systems. These optional components are summarized below.

Data-Collection Devices and Programs

Punches may be collected through a variety of different methods, but in most cases employees enter punches using time clock devices. Many different models of time clocks are available including Ethernet-based time clocks, weatherized time clocks, and biometric time clocks that verify employees’ identities using hand geometry technology. Empower Software Solutions works closely with many leaders in the data-collection terminal industry, including Accu-Time Systems and Ingersoll Rand Recognition Systems, and many models of previously purchased time clocks can be converted for use with EmpowerTime for a nominal fee.

Whenever time clock devices are used as a method of data collection, a time clock communications module must be installed to link the time clocks to EmpowerTime. The process of communicating with a time clock device is called polling, and Empower Software Solutions offers several modules for polling a variety of time clocks. Time
clock communications modules are provided at no extra cost with the purchase of a time clock device through Empower Software Solutions.

Time clocks aren’t suitable for every workplace environment, so Empower Software Solutions also offers a data-collection software module called WebEntry. WebEntry is an Internet browser-based data-collection and self-service reporting system that runs over the Internet or company intranet. WebEntry includes a variety of data-entry styles that can collect punches and hourly records.

Punches and hours can also be automatically generated by EmpowerTime, but these features are generally reserved for salaried employees. For example, EmpowerTime can generate five eight-hour pay records per week for a salaried employee, and those records can be modified whenever the employee takes vacation or sick leave. This allows employers to accurately track the use of benefit hours for all employees through a single software system.

Data-collection devices and software modules may be mixed together in any combination necessary to accommodate all employees within the organization. Regardless of the methods used for data collection, EmpowerTime processes punches and hours throughout each pay period in order to calculate total hours, identify exceptions that require a supervisor’s attention, and prepare a file to be exported to payroll.

**Client Access Modules**

EmpowerTime may be installed on a network server and operated from workstations across a local–area network (LAN) or wide-area network (WAN). Supervisors, managers, and payroll personnel aren’t always the only employees who need access to actionable time and attendance data. WebEntry has an optional employee self-service module that allows employees to view personal time and attendance reports through a standard Internet browser connected to the World Wide Web or company intranet. With a click of the mouse, employees can easily obtain information such as recent timecards, hours worked, allocation of hours, schedules, and vacation and sick leave balances. WebEntry can be set up on individual workstations or a centrally located computer kiosk, giving all employees access to the information they need. Employees can access this information without assistance from their supervisors or the human resources department, leaving everyone with more time to focus on work.

**Interface and Integration Modules**

Empower Software Solutions specializes in developing interface and integration modules that link EmpowerTime to other critical business systems such as payroll, human resources, scheduling, general ledger, and manufacturing (ERP/MRP) systems. Interface modules are designed to import or export text files in predetermined formats that may be produced or read by another business system. Integration modules accomplish import or export functions by directly reading from or writing to databases in another business system. EmpowerTime is almost always linked to payroll systems or services, and is commonly linked to human resources systems as well. Some of the business systems EmpowerTime is commonly integrated with include Sage Abra HRMS and Microsoft Dynamics GP.
Other Modules

Time and attendance tracking can go much further than simply collecting punches, calculating hours, and tracking benefit hours. Some businesses have complex attendance rules that penalize employees for tardies, absences, and other infractions, or give benefits for perfect attendance. Other businesses have complex rules for accruing benefit hours or storing overtime hours as compensation time. Empower Software Solutions offers the Points Manager and Benefits Manager modules to meet these additional time and attendance needs.

Points Manager is an optional add-on feature available in EmpowerTime for tracking employees’ attendance infractions, assigning values to those infractions, and determining penalties according to defined limits. Points Manager can also be configured to reward employees for defined periods of perfect attendance. As employees incur infractions, EmpowerTime assigns point or hourly values to each infraction. Points Manager performs calculations according to the policy configuration, checks whether the point totals have reached predetermined thresholds, and creates penalties when those thresholds are reached. Perfect Attendance rewards can cause a reduction in the employee’s balance, or can generate a pay record for the employee. Management can run reports on employees who have received penalties so that appropriate actions can be taken, and Points Manager can be configured to automatically email supervisors when employees incur infractions. In addition, Points Manager allows users to enter supervisors’ comments about infractions so that those comments can be viewed or reported on.

Benefits Manager is an optional add-on feature available in EmpowerTime for tracking employees’ benefit plans. Benefits Manager performs calculations according to the configuration of policies, and different calculation rules can be defined for different types of employees such as full time or part time. In addition, each policy can have multiple periods or time frames in which different calculation methods are employed. Employees can be assigned to multiple consecutive policies over their tenure, and each benefit type has its own policies and rules calculations.

1.3 Hardware and Software Requirements

The EmpowerTime Automated Timekeeping System, EmpowerTime modules, and time clock devices will not function properly unless installed on servers, workstations, and networks that meet the minimum system requirements. Prior to installing or upgrading any Empower Software Solutions products, it is essential to check all system requirements for compatibility with all applicable computer and network devices. Empower Software Solutions accepts no liability for product performance when Empower Software Solutions products are installed on servers, workstations, and networks that fail to meet the minimum system requirements.

Minimum system requirements vary depending on the version of EmpowerTime, number of client seats, number of employees to be tracked, network architecture, and other modules to be installed. Minimum system requirements may change without notice due to new product releases, advances in technology, or other performance related concerns. For these reasons, current system requirements are not printed in this
user’s guide. For a list of the most current system requirements for Empower Software Solutions products, please contact Empower Technical Support at 720-241-5353 or support@empowersoftware.com.

1.4 Product Installation and Upgrades

The procedures for installing and upgrading EmpowerTime vary depending on the version, number of client seats, number of employees to be tracked, network architecture, and other modules to be installed. Product installation and upgrades should be performed only with assistance from Empower Technical Support, an Empower Software Solutions Implementation Specialist, or a certified Empower Software Solutions Business Partner, so installation and upgrade instructions are not provided in this user’s guide. Information Technology professionals and system administrators may obtain documentation on general installation or upgrade procedures by contacting Empower Technical Support at 720-241-5353 or support@empowersoftware.com. Empower Software Solutions accepts no liability for losses incurred as a result of installations and upgrades performed without assistance from Empower Technical Support, an Empower Software Solutions Implementation Specialist, or a certified Empower Software Solutions Business Partner.

1.5 EmpowerTime Configuration Procedures

Every installation of EmpowerTime is unique because every business handles time and attendance tracking differently. Some businesses round punches and automatically deduct lunch minutes, while other businesses pay employees different rates depending on the jobs they work throughout a day. In addition, the configuration of EmpowerTime varies depending on the business systems that are linked to EmpowerTime through integration or interface modules. For example, some payroll systems cannot import payroll files that contain dollar values, so EmpowerTime must be configured to export only the type of information that can be interpreted by payroll. One must carefully consider many different factors before configuring an EmpowerTime solution in order to ensure that the system performs correctly.

Due to the complexity of the EmpowerTime rules system, Empower Software Solutions recommends that EmpowerTime be configured or altered only with the assistance of Empower Technical Support, an Empower Software Solutions Implementation Specialist, or a certified Empower Software Solutions Business Partner. Empower Software Solutions accepts no liability for losses incurred as a result of system configurations performed without assistance from Empower Technical Support, an Empower Software Solutions Implementation Specialist, or a certified Empower Software Solutions Business Partner.

System Configuration Checklist

While there is no standard EmpowerTime configuration, there is a standard order in which EmpowerTime rules should be configured. The sequence of chapters in this user’s guide is based on this standard order of the configuration process. Whenever a
particular rule option is unnecessary, one may skip over that option and proceed to the next item in the standard configuration process. The standard configuration process is summarized on the system configuration checklist provided below. Keep in mind that additional steps are necessary to set up time clock devices and other software modules.

- Create a new company (all applicable steps listed below should be completed for each new company)
- Define pay periods and organization levels
- Populate code tables with all applicable organization codes
- Create pay types
- Define which pay types accumulate toward overtime
- Define hours and dollars pay types
- Create pay classes
- Define overtime rules
- Define rounding and schedule rounding rules
- Define lunch and break rules
- Define shift premium rules
- Define weekly premium rules
- Create rate override classes
- Create error classes
- Configure the exceptions to be tracked by EmpowerTime
- Create holiday classes
- Define all company recognized holidays
- Create attendance plans
- Create user IDs
- Define menu style for each user
- Define system permissions and filters for each user
- Create employee records
- Assign employees to all applicable EmpowerTime rules
- Create, assign, and copy schedule templates
- Create and schedule automated tasks

1.6 Using This Guide

This user’s guide includes 21 chapters covering topics from basic setup and navigation to advanced rules and system automation. Helpful comments like the ones below are provided throughout this guide.

**EXAMPLE:** Provides descriptions of EmpowerTime features in real-life situations. Multiple examples are often provided in sections that deal with complex topics.

**NOTE/REMINDER:** Presents a special emphasis to keep you on the right track.

**TIP:** Provides ideas on how specific features can be used in order to get the most out of EmpowerTime.

**WARNING:** Prompts you to slow down and proceed with caution. Some processes and features, if performed out of order or set up incorrectly, can cause errors or unnecessary headaches. Keep an eye out for warnings as you read through this guide.
1.7 Sample Data

EmpowerTime includes a sample company represented by the company code ZSI. By default, ZSI is the active company the first time that EmpowerTime is launched. ZSI data may be used to work through examples, test rules settings, or practice activities like correcting timecards and closing a pay period. To work with the sample ZSI data, simply ensure that the ZSI company code is displayed in the lower left corner of the EmpowerTime window.

1.8 Empower Technical Support

Empower Software Solutions provides customer support services free of charge to all registered end users of Empower Software Solutions software products for a period of 30 days from the date of sale of the software products, or, if installed by Empower Software Solutions, from the date of installation. Technical support hours are from 8 a.m. to 8 p.m. Eastern time, Monday through Friday, except holidays.

After the initial 30-day period, Empower Software Solutions reserves the right to refuse a support request from a customer or the customer’s agents if the customer has not purchased an extended customer support agreement. Extended customer support is available for 12 months beginning from 30 days after the installation date and is renewable annually thereafter. Extended customer support includes unlimited telephone support and remote access support (via GoToAssist or similar remote-access software) during normal customer support hours. Customer support does not include training for new system users, retraining for existing system users, or migrations/reinstallations of software and data to new servers or computers. System training may be purchased separately.
CHAPTER 2—NAVIGATING THE SYSTEM

2.1 Logging In

Double-click the desktop shortcut to EmpowerTime™ or click the EmpowerTime icon under the Programs section of the Windows Start menu to access the EmpowerTime logon screen as shown in the figure below. A valid user ID and password are required to access the program, but EmpowerTime is installed with a default ID that may be used during the initial setup. To log on using the default ID, enter DEFAULT in the User ID field, leave the Password field blank, and click OK. The default user ID should be changed or deleted once other User IDs are established. See Chapter 11—User Setup for more details on setting up user IDs and security.

![EmpowerTime Logon Screen](image)

Figure 1: EmpowerTime Logon Screen

**TIP:** To create a desktop shortcut to EmpowerTime, right-click the EmpowerTime icon found in the EmpowerTime section of the Programs list in the Start menu. Choose Send To from the menu, then Desktop from the submenu. This will create a new icon on your desktop.
2.2 EmpowerTime Workflow

Anytime a user logs into EmpowerTime, they see the EmpowerTime main screen. The main screen contains a navigation pane on the left and drop-down menus along the top for navigating the EmpowerTime system. EmpowerTime users always default to the Home screen when logging into EmpowerTime. The Home screen is a customizable workflow that can be set up to indicate pending tasks, display KPI information, messages, and other information. A detailed explanation of workflow setup can be found in Chapter 11—User Setup.

![EmpowerTime Home Screen and Workflow](image)

2.3 Main Screen Drop-Down Menus

The main screen above shows the default organizer menus displayed after logging on to EmpowerTime with the Default user ID. The organizer menus cannot be customized, although permissions can be restricted for specific users if necessary.

The drop-down menus divide the core functionality of EmpowerTime into five drop-down menus: Activities, Employees, Rules Setup, History, and Reports. Each drop-down menu contains several configuration options. Choosing options from the drop-down menus will open a configuration tab in the working area. The functions available in the drop-down menu are described on the next page.

**TIP:** All drop-down menu options are accessible through keyboard shortcuts. Press the Alt key and the underlined letter to access a specific menu option.
File
- **Logon**
  Exits EmpowerTime to the user logon screen.
- **Change Password**
  Provides access to the Change Password utility.
- **Change Company**
  Provides access to other companies set up in EmpowerTime.
- **Add Company**
  Adds a new company to EmpowerTime.
- **Remove Company**
  Removes a company from EmpowerTime.

**WARNING:** Never remove a company from EmpowerTime once data has been collected for it. If you remove a company, it will be removed from the EmpowerTime interface, and all company-related data will be purged from the current and historical databases. The company functions are password protected for this reason. The password is *employees*.

- **Upgrade Reports**
  This function copies all of the standard report template files over the template files in the currently displayed company. This function is reserved for Empower Software Solutions Support Technicians.
- **Exit**
  Exits the program.

View
- **Log Information**
  Toggles the Log Information window.
- **Reports**
  Toggles the Reports pop-up menu.
- **Favorite Reports**
  Toggles the Favorite Reports pop-up menu.
- **Requested Reports**
  Toggles the Requested Reports pop-up menu.
- **Contents**
  Toggles the display of the navigation pane.

Activities
- **General**
  This link will pull up the General Activities screen which includes activities such as Posting, Employee Approvals, Missing Punch Editor, Rejected Punches, and End of Pay Period Activities.
- **Time Off Requests**
  The Time Off Requests option will open the Time Off Requests screen, where supervisors can accept and decline time off requests from employees.
- **In/Out Board**
  Provides access to the In/Out Board.
- **Supervisor Data Collection**
The Supervisor Data Collection screen allows managers to enter pay records for employees.

- **Employee Approvals**
  The Employee Approvals option displays a list of all timecards pending approval.

- **Daily Status**
  The Daily Status option displays a list of all employees in the current company and if they have any critical or noncritical errors.

### Employees
- **Employees**
  Provides access to the Employee Setup notebook.
- **Scheduler**
  Provides access to the Employee Scheduler.
- **Templates**
  Provides access to the Schedule Template Setup utility.

### Rules Setup
- **Company Setup**
  The Company Setup contains all of the global configuration options.
- **Pay Classes**
  The Pay Classes option will open up the Pay Classes screen where rules governing the calculation of hours are configured.
- **Code Tables**
  The Code Tables option will open up the Code Tables screen where codes can be assigned to the organization levels defined in the Company Setup.
- **Holiday Classes**
  The Holiday Classes Option will open up the Holiday Classes screen where holiday rules governing worked and non-worked holiday benefits are configured.
- **Rate Override Classes**
  The Rate Override Classes option will open up the Rate Override Classes screen where rules can be setup allowing pay rates and detail information to be changed when detail information satisfies defined conditions.
- **Pay Types**
  The Pay Types option will open up the Pay Types screen where the types of hours and dollars tracked by EmpowerTime are defined.
- **Pay Type Groups**
  The Pay Type Groups option will open up the Pay Type Groups screen where pay types can be assigned to pay type groups for summarization on the timecard screen.
- **Error Classes**
  The Error Classes option will open up the Error Classes screen where rules governing the generation of exceptions (i.e. tardy, absent, and early out) are defined.
- **Attendance Plans**
  The Attendance Plans option will open up the Attendance Plans screen where rules governing benefit plans (i.e. vacation and sick time) are defined.
- **User Setup**
The User Setup option will open up the User Setup screen where EmpowerTime users are managed.

- **Employee Workgroups**
  The Employee Workgroups option will open up the Employee Workgroups screen where Time Off Request rules are defined.

- **Workflow Configuration**
  The Workflow Configuration option will open up the Workflow Configuration screen where the features available for users in the home screen are defined.

- **Payroll System Comments**
  The Payroll System Comments option displays a page where users can create comments and read comments left by other users.

- **User Security Settings**
  The User Security Settings section allows users to configure password requirements, IP restrictions, and password reset questions for logging on to EmpowerTime.

### History

- **Browse Data**
  The Browse Data option will open up the historical browsing screen where all historical data can be viewed on a user by user basis.

- **Purge History**
  The Purge History option purges information from the historian.

- **Sort Descending**
  If the Sort Descending option is checked, history records will automatically be sorted from newest to oldest.

### Reports

- **Active and History**
  Contains links to all of the reports the user has access to view.

### Programs

- **Customize Toolbar**
  This option allows you to add links to other programs in the Programs dropdown menu.

### Utilities

- **Rebuild Clock Files**
  Rebuilds a clock.dat file from backup punch files (CK files).

- **Purge Audit Transactions**
  Provides access to the Purge Audit utility used to delete the system function audit trail (date selectable).

- **Purge Timecard Audit Trail**
  Provides access to the Purge Audit utility used to delete the punch correction audit trail (date selectable).

- **Mass Update**
  Provides access to the Mass Update utility.

- **Security Templates**
The security templates option opens the security templates screen where user security settings can be defined. These templates are used in the User Setup section.

- **Request Shutdown**
  Provides access to the Shutdown Request utility.

- **Cancel Shutdown**
  Cancels an active shutdown request.

- **E-Mail Setup**
  Provides access to the E-Mail Setup and Address Book sections of EmpowerTime.

**Help**

- **EmpowerTime Customer Web Site**
  Opens empowersoftware.com using the default Internet browser. An Internet connection is required to visit the Web site.

- **Send Mail to Empower Software Solutions**
  Creates a blank e-mail addressed to Empower Technical Support using the default SMTP e-mail client program.

- **Change Licensing**
  Opens a utility used to enter a serial number and product key for new licensing.

- **EmpowerTime Help**
  Opens the EmpowerTime help file.

- **Command Line Options**
  Displays a list of all command line options available in EmpowerTime for automation of posting.

- **About EmpowerTime**
  Opens the About screen.
2.4 Navigation Pane

The navigation pane is designed to be an easy navigation tool for supervisors to use when reviewing EmpowerTime data. The navigation pane is broken down into six sections listed at the bottom of the pane.

Clicking one of the navigation buttons will cause a list of associated options in the main portion of the navigation pane. The options associated with the Employees group are shown below.

Clicking on any of the options will cause that portion of EmpowerTime to appear in the working area.
2.5 Status Bar

A status bar is always visible at the bottom of the EmpowerTime window. The status bar provides access to several functions and displays system information. The fields on the status bar, from left to right, are described below.

![Figure 5: Status Bar](image)

- **Current User**
  Displays the ID of the user currently logged into EmpowerTime. Double-click to return to the User Login screen.

- **Current Company**
  Displays the code and description of the company currently open in EmpowerTime. Double-click to change active companies.

- **Hint/Status**
  Describes the contents or action of a field or button when the mouse cursor hovers above the field or button. Also details the current state of the system during processing.

- **Number Lock**
  Indicates the status of the Number Lock button. If Num Lock is displayed in this field, the Number Lock is enabled. If blank, it is disabled.

- **Caps Lock**
  Indicates the status of the Caps Lock button. If Caps Lock is displayed in this field, the Caps Lock button is enabled. If blank, it is disabled.

- **Time**
  Displays the current time from the local computer. If the time displayed in this field is incorrect, change the computer time through the Windows Control Panel.
2.6 Buttons and Shortcuts

Many different types of buttons, toolbars, and shortcuts are available throughout EmpowerTime, all of which are summarized below. For more detailed instructions on a particular option, see the chapter corresponding to the section in which that option is available.

Navigation Toolbar and Function Buttons

A navigation toolbar is located at the top of the screen in several sections of EmpowerTime including the Employee Setup notebook. The same buttons are used for functions within detail sections as well.

![Navigation Toolbar and Function Buttons]

Scrolls to the prior record in the list. Pressing Page Up or Shift + P also activates this function.

Scrolls to the next record in the list. Pressing Page Down or Shift + N also activates this function.

Adds a record to the list. Pressing F4 or Shift + A also activates this function.

Saves any changes made to the current record. Pressing F5 or Shift + S also activates this function.

Deletes the current record. Pressing F7 or Shift + D also activates this function.

Activates the search function to locate a specific record. Pressing F2 or Shift + E also activates this function.

The filter button allows EmpowerTime users to define filters that narrow down the number of employees that appear in EmpowerTime.

Drop-Down Lists
Wherever a down arrow appears in a field, a drop-down list is available. Click on the arrow to see all the available entries for that field.

<table>
<thead>
<tr>
<th>Location</th>
<th>HQ</th>
<th>None Specified</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>EAST</td>
<td>East Division Office</td>
</tr>
<tr>
<td></td>
<td>FIELD</td>
<td>Field Consultant</td>
</tr>
<tr>
<td></td>
<td>HQ</td>
<td>Headquarters</td>
</tr>
<tr>
<td></td>
<td>MIDWEST</td>
<td>Midwest Sales Office</td>
</tr>
<tr>
<td></td>
<td>OHIO</td>
<td>Ohio</td>
</tr>
</tbody>
</table>

Figure 7: Drop-Down Menu

**Right Mouse Button**

Clicking the right mouse button on many screens throughout EmpowerTime activates a pop-up menu with field or section-specific choices. The right-click menu options will vary depending on the current screen.

**Keyboard Shortcuts**

Keyboard shortcuts can often be used in place of mouse clicks. A list of common keyboard shortcuts is provided below.

- **F2**
  Activates the search function.

- **F4**
  Adds a new record to the list.

- **F5**
  Saves changes made to the current record.

- **F7**
  Deletes the current record.

- **F8**
  Displays a calendar indicating the current pay period.

- **F9**
  Displays the decimals to minutes conversion chart.

- **F11**
  Displays the 12-hour to 24-hour format time conversions chart.

- **F12**
  Provides access to the Windows calculator.
Column Filters

Column filters are commonly used by EmpowerTime users to reduce the number of displayed users in EmpowerTime. An example of where column filters can be useful is in the Employee Scheduler. By default, an EmpowerTime user will have a list of all employees they have access to view. If the user would like to view only the employees in a specific group, they can choose that group from the drop-down menu at the top of that column. In the following example, the ENGINEERING division was chosen from the drop-down menu, and the only employees displayed are the employees assigned to that division.

![Figure 8: Employee Schedules Filtered to Show the Engineering Division](image)

Conditional filters can be setup using the A button. These filters allow EmpowerTime users to look only at employees that meet certain conditions. A user could choose to look only at employee numbers starting with the number 4 or location codes that include the letters NY. To set up a conditional filter, click the A button and choose a condition from the drop-down menu. Next, type the string in the field against which the condition will qualify. For example, choosing the Starts With condition and typing K in the Last Name column will display only the employees whose last name starts with K.

![Figure 9: Using Conditional Filters](image)

**NOTE:** Any time you change the filter logic, the icon on the button will change to represent the logic chosen. This can be used as a quick visual indicator.
CHAPTER 3—COMPANY SETUP

3.1 Overview

This chapter describes the process of creating a new company in EmpowerTime™ and configuring the Company Setup section, two of the first steps that must be completed in setting up EmpowerTime. Instructions on setting up the other rules necessary to operate EmpowerTime are provided in the following chapters.

A company in EmpowerTime generally refers to an organization or part of an organization that has a unique Federal tax ID. Some businesses have a single tax ID and a single company set up in EmpowerTime, while other businesses have multiple companies within the organization that are represented as multiple companies in EmpowerTime. There is no limit to the number of companies that may be set up in EmpowerTime.

TIP: To facilitate an easy interface to payroll, the company setup in EmpowerTime should mirror the company setup in payroll. Whenever possible try to use the same company codes, pay type codes, department codes, employee IDs, etc.

3.2 Creating a Company

To add a new company code to EmpowerTime, click the File drop-down menu and select Add. EmpowerTime prompts for a three-character company code and a three-character company alias code. The company code defines the name of the EmpowerTime subdirectory in which all company information will be stored, while the company alias code defines the code displayed in the status bar of the window when the company is active in EmpowerTime. In most cases, both codes are the same and match the company code(s) set up in payroll. Enter both codes and click OK.

As EmpowerTime creates the necessary tables for the new company, the status bar indicates the progress of the company creation process. Once the process is complete, the new company becomes the active company and the status bar at the bottom of the EmpowerTime screen displays the code for the new company in the status bar.

The new company is now ready to be configured with rules. To get started, go to the Rules Setup drop-down menu and click Company Setup. Select General from the submenu to access the general options. Begin by entering the name and address of the company.

REMINDER: You can set up as many different companies in EmpowerTime as is necessary. In most cases, different companies are set up for organizational divisions that have separate federal tax IDs.
3.3 Defining Pay Periods

Five different kinds of pay periods can be defined in EmpowerTime: weekly, biweekly, semimonthly, monthly, and custom. Each company can have several pay periods simultaneously in use for different groups of employees. For example, hourly employees can be paid weekly while salaried employees are paid biweekly. As many pay periods may be activated as necessary, but there can only be one instance of each kind of pay period per company. In other words, two weekly pay periods with different start dates cannot be set up in the same company. To set up two different weekly pay periods in the same company, one pay period would need to be set up as a weekly pay period and the other as a custom pay period.

To define a pay period, go to the Rules Setup menu and select Company Setup → General. Place a check mark next to the appropriate pay period heading. Next, enter the start date of the pay period by typing directly into the date field or by clicking the drop-down menu and selecting a date from the calendar. EmpowerTime automatically rolls forward pay period dates every time the pay period closing process is executed (except for custom pay periods), so dates only need to be defined during the initial setup.

**WARNING:** Once pay periods have been defined and EmpowerTime has started collecting and processing data, do not modify the pay periods unless asked to do so by Empower Technical Support.
Whenever a semi-monthly or monthly pay period is defined, a week start day must also be entered. The week start day defines the beginning of the pay week and is used for calculating weekly overtime.

Up to five custom pay periods can be created to account for a unique pay period length or an additional standard pay period. When a custom pay period is defined, a custom start date and custom end date must be entered. The custom pay period may be of any length. The week start day is assumed to be the same day as the start date.

**WARNING:** Custom pay period dates do not automatically roll forward, so they must be reestablished in the Company Setup notebook at the beginning of each new pay period.

### 3.4 System Options 1

**System Options 1** contains a number of company-specific setup parameters. All of the fields in this section are explained in detail below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Track absences thru today</td>
<td>Yes, Max out time&lt;br&gt;500</td>
</tr>
<tr>
<td>Track absences w/pay recs</td>
<td>Yes, Employee present 1&lt;br&gt;Misc. 1</td>
</tr>
<tr>
<td>Use clock location code</td>
<td>Check Only&lt;br&gt;Employee present 2&lt;br&gt;Misc. 2</td>
</tr>
<tr>
<td>Map clock location to</td>
<td>Clock Location&lt;br&gt;Employee present 3&lt;br&gt;Misc. 3</td>
</tr>
<tr>
<td>Map clock transfer to</td>
<td>Org Location&lt;br&gt;E Mail exceptions&lt;br&gt;Yes</td>
</tr>
<tr>
<td>Include All Clock Location</td>
<td>Yes, Prompt For Audit Reason&lt;br&gt;Yes</td>
</tr>
<tr>
<td>Backup clock date</td>
<td>Yes, Disabled</td>
</tr>
<tr>
<td>Process SN 80 Punches</td>
<td>Yes, Disabled</td>
</tr>
<tr>
<td>Use restriction scheduling</td>
<td>Yes, Company logo&lt;br&gt;Load&lt;br&gt;Close&lt;br&gt;Style editor&lt;br&gt;Style manager</td>
</tr>
<tr>
<td># of days of restriction</td>
<td>2&lt;br&gt;4</td>
</tr>
<tr>
<td># of hours to schedule to save</td>
<td>4&lt;br&gt;8</td>
</tr>
<tr>
<td>Code Table Mapping</td>
<td>Yes, Yes</td>
</tr>
<tr>
<td>Additional Reports Sort</td>
<td>Yes, Yes</td>
</tr>
</tbody>
</table>

**Figure 11: System Options 1 in Company Setup**

**Track Absences Through Today**

Defines whether or not the Absent exception is generated for employees who are scheduled for the current day but have not yet punched in. If unchecked, EmpowerTime will only generate Absent exceptions through the previous day.

**TIP:** This option is useful if supervisors need to run reports at the beginning of shifts in order to determine whether or not all jobs or departments are covered.

**Track Absences W/ Pay Records**

Defines whether or not pay records (e.g., for vacation or sick leave) suppress Absent exceptions. If unchecked, Absent exceptions are generated for employees who do not punch in on a scheduled day, regardless of any pay records that have been entered for the day.
Use Clock Location Code
Defines whether or not location codes are associated with time clocks. If Clocks Only is selected, an employee who punches in at a clock will automatically have his hours allocated to the location code assigned to the clock. If Web Only is selected, and employee who punches in using WebEntry will automatically have their IP address logged as the code for the associated organization level. Setting this to Clocks & Web will collect codes from both physical clocks and WebEntry as described above. This provides an accurate accounting of labor by location on the Labor Analysis report. In order for this feature to work correctly, location codes must be set up in the time clocks and communications module (depending on the type of time clocks).

**TIP:** This option is useful if employees work at locations other than their home locations.

Clock location codes help ensure proper allocation of hours to the correct locations based upon the time clocks at which employees punch in for the day.

**Map Clock Location To:**
Defines the organization level equivalent to clock locations. This feature is used only if clock location codes are enabled. Select the appropriate organization level from the drop-down menu.

**EXAMPLE:** If a time clock is installed in each department, clock locations can be mapped to the Department organization level. When an employee punches in at a time clock away from her home department, her hours are automatically associated with the correct department code.

**Map Clock Transfer To:**
Defines the organization level that is mapped to the Transfer button on time clocks. Most EmpowerTime-compatible time clocks contain a transfer key that can be mapped to the organization level specified in this field.

**Include All Clock Locations**
Determines whether or not clock locations should be recorded with all punch type data from the time clocks or WebEntry. If this box is checked, EmpowerTime will create a detail record for all in, out, and transfer punches. The clock location data will be viewable on the timecard screen but will not be editable.

**Back Up Clock Data**
Defines whether or not clock.dat files should be backed up. When standard time clocks are polled, the downloaded punch transactions are automatically backed up in CK files. If the time clocks and communications module in use were provided by a third-party, backup clock files (like CK files) might not be automatically created. Check this box only if third-party time clocks are in use.

**TIP:** Backup clock files can be used to recover lost punch transactions in the unlikely event that punches are accidentally deleted. Backup clock files, or CK files, are stored in the corresponding company subdirectory. EmpowerTime holds CK files for 45 days, after which they are automatically deleted. For more information on restoring backup clock files, see Chapter 19—System Utilities.
Process SNGO Punches
Defines whether or not the swipe-and-go (SNGO) feature is enabled at time clocks. SNGO is a feature that allows employees to punch in or out without first pressing buttons on the clock.

By default, this option is set to **Disabled**. Setting this option to **Simple Pairing** will consider each pair of punches less than 12 hours apart as In For Day and Out For Day. Setting this option to **Intelligent** allows EmpowerTime to interpret a group of four SNGO punches as In For Day, Out For Lunch, In From Lunch, and Out For Day.

Use Restriction Scheduling
Defines whether or not employees are restricted from punching outside of scheduled shifts. If Yes is selected, time restrictions (lockout periods) are downloaded to time clocks during each polling session. Not all time clock models support restriction scheduling. For more information on restriction scheduling, see Chapter 6—Pay Classes.

**# Of Days Of Restriction:**
Defines the number of days of schedule restrictions that are downloaded to time clocks. The default setting is two days. Schedule restrictions are updated each time the host computer communicates with time clocks. Restriction scheduling must be enabled to use this feature.

**WARNING:** Restriction scheduling reduces the amount of clock memory available for storing punches.

**# Of Schedule Weeks To Save:**
Defines the number of weeks of schedules (prior to the current week) to be saved by EmpowerTime. Saving old schedules can be helpful in retail or variable schedule environments where old schedules are commonly recopied.

Code Table Mapping
Data from the clock can be mapped to an alphanumeric field. For example, if an employee uses the clock to complete a department transfer, the employee must enter the number that has been assigned to that department. If code table mapping is turned on and configured, EmpowerTime will map that number to the name of the department when the clock is polled. When this box is checked, a new column will appear in Code Table configuration.

Additional Reports Sort
Turning this feature on will provide up to five sorting options on certain reports. With this feature off, there will only be three sorting options on those reports.

Max Out Time
Defines the standard minimum amount of time between an Out For Day punch and the next In For Day punch. If the elapsed time between an Out For Day punch and the employee’s next In For Day punch is less than this value, the In For Day punch is converted to an In For Day Again (IDA) punch and the two segments of work are totaled as one daily grand total. The default setting is eight hours.
WARNING: The Max Out Time setting can greatly affect daily overtime calculations. If Max Out Time is set to zero and employees commonly work two shifts per day, the two shifts will not be totaled together and daily overtime may not be calculated correctly.

Employee Prompts
Defines the labels for the three miscellaneous fields in the Time Attendance screen in the Employee section. Miscellaneous fields can be used for any employee related information not stored in other EmpowerTime fields.

E-Mail Exceptions
Defines whether or not EmpowerTime downloads employee information to Verifone time clocks during polling sessions. The information that is downloaded includes missing punches and hours worked for the week per employee. Each employee’s information is downloaded only to the default clock number assigned in the Time Attendance screen in the Employee section. Do not check this option if Verifone time clocks are not in use.

Prompt For Audit Reason
Defines whether or not users are prompted for audit reasons every time changes are made to any employees’ timecards. If enabled, a table of audit reasons must be built in the Code Tables notebook, and EmpowerTime prompts users to select an audit reason code before accepting any changes. This option is useful if many different users correct employees’ timecards. The Audit Trail report lists the users that made changes and the date the changes were made.

TIP: Although extremely useful for tracking purposes, audit reasons significantly slow down the punch correction process. This feature is probably unnecessary if only a few EmpowerTime users are allowed to edit employees’ timecards.

Company Logo
Defines the filename and location of a company logo to be displayed on all EmpowerTime reports. To select a logo, click the Load button and locate the appropriate image file. Logos must be saved in BMP, JPEG, or PNG formats to be loaded into EmpowerTime.

Style Editor
This utility allows you to create a custom color theme for the EmpowerTime interface.

Style Manager
This section allows you to choose from one of three standard color themes for the EmpowerTime interface.
3.5 System Options 2

System Options 2 contains a number of company-specific setup parameters. All of the fields on this section are explained in detail below.

![Figure 12: System Options 2 in Company Setup](image)

Move Attendance To Historian During Pay Period Close
Defines whether or not attendance transactions are moved to the Historian during the pay period closing process. Check the Yes box if attendance balances are imported at the beginning of every pay period. Leave this option unchecked if attendance balances are manually entered in EmpowerTime. This option is set to Yes by default.

Read Punches From
EmpowerTime reads punches from a CLOCK.DAT file and the UNCKTRANS table. Punches are downloaded from time clocks to both locations and are processed during the posting process. Both options are set by default and cannot be changed.

Reject Duplicate Transactions
Defines whether duplicate transactions are rejected or posted to employees' timecards. If this option is set to Yes, duplicate transactions are sent to the rejected punches bin. This option is set to Yes by default.

Reject Invalid Detail Transactions
Defines whether or not transactions are rejected when the labor detail is invalid. This option is typically left unchecked only in situations where specific combinations of work orders, job numbers, etc. are validated against outside tables. If left unchecked, punches with invalid detail are displayed on timecards in the color light blue.

**REMINDER:** The labor detail associated with a punch is considered to be invalid only if at least one level is set up for validation and the code that is associated with the punch for that level does not exist within the EmpowerTime Code Tables notebook.

Multiple Schedule Templates
Defines whether or not employees may be assigned to multiple schedule templates to accommodate a flex scheduling policy. If enabled, EmpowerTime selects the closest schedule each day based on an employee's In For Day punch.
Consolidate Payroll Segments
Defines the manner in which EmpowerTime handles segments of work when collecting quantities in one of the organization levels. Setting this field to Yes, the default value, EmpowerTime consolidates all alike, continuous segments of work. This behavior can be changed as demonstrated by the following example.

EXAMPLE: A company tracks quantities under an organization level called Quantity. An employee works two hours and produces 25 pieces, then works another two hours on a different labor account and produces another 25 pieces. By default, EmpowerTime calculates the labor for this day as one segment of four hours worked in the quantity level. With this option set to No, however, EmpowerTime calculates the labor as two segments of two hours worked, with 25 pieces produced in each separate segment.

Date Format
This field allows users to select how dates are displayed in EmpowerTime.

Log ERP Transactions
Defines which ERP transactions, if any, are logged. The options available in the drop-down menu are Edits, All, and None.

WARNING: Do not enable the Log ERP Transactions feature without assistance from Empower Software Solutions. Several stored procedures must be installed in order for this feature to work correctly.

Purge ERP Transactions On Close
Defines whether or not ERP transactions are purged during the pay period closing process.

Approval Type
Defines the action EmpowerTime takes if a pay period is closed before all employees’ hours have been approved. Reminder enables a warning window, Restricted prevents closing until all records have been approved, and None disables all warnings. The details of the approval process are also defined by clicking the detail button next to the Approval Type button.
Multi-Level Review Options
Clicking on the detail button next to the Approval Type field will display the Multi-Level Reviews detail window as seen below. The options in this window determine how many levels of review are applied to employee timecards. The employee’s pay class assignment determines whether or not that employee will be subject to approvals and review.

![Multi-Level Reviews](image)

**Figure 13: Multi-Level Review Configuration**

Each review level can be enabled to allow up to five different levels of supervisor review. Each level enabled will appear as a separate approval checkbox. If you wish to have employees review their timecards, set the Employee Level to one of the five review levels. This step does not approve the timecard for payroll purposes, but it does allow the employee to verify that their timecard is correct.

WebEntry Logon Mode
Defines the type of logon security to be used for WebEntry, an Internet browser-based data collection program. The available options are Badge, Employee ID, Badge And PIN, and Employee ID And PIN.

**TIP:** PINs are assigned on the Time Attendance screen of the Employee section and are used by both the WebEntry and WinPunch modules.

DCOM Validation
Defines whether or not the DCOM Validation module is installed. The DCOM Validation module performs real-time, context-sensitive validations of labor transactions against external sources using ADO/ODBC connections. Note that this feature does not function like an EmpowerTime interface module that imports or exports data, but rather accesses external tables for validation lookups. The DCOM Validation module that this feature enables is an add-on module. Contact Empower Technical Support for more information on this feature.

Validation Filter
Defines a filter to be applied to all records that pass through the DCOM Validation module. In most cases, DCOM Validation filters are configured to allow only direct hours to be processed. This option is disabled unless DCOM Validation is enabled.

**Piece Rate Type**
Defines the type of piece rate tracking to be employed by EmpowerTime. Piece rate tracking must be enabled in order to access this option. Contact Empower Technical Support for more information on this feature.

**Piece Rate Setup**
Defines the configuration for the type of piece rate tracking selected in the **Piece Rate Type** field. Piece rate tracking must be enabled in order to access this option. Contact Empower Technical Support for more information on this feature.

**Concurrent Job Key**
Defines which organization level or levels determine the key between MAX and EMAX or CON and ECON records. The organization levels selected here are the levels for which labor detail codes must match for any pair of MAX/EMAX or CON/ECON transactions. This feature is only used in conjunction with the Piece Rates module and concurrent job tracking. Contact Empower Technical Support for more information on this feature.

**Auto Reason Code**
Defines whether absence reason codes are assigned to pay records based on the selected pay type. If set to **Yes**, all applicable pay types must be configured with a default absence reason code as described in Chapter 5—Pay Types and Pay Type Groups.

**Plain Text Notes**
Defines whether the Notes screen in the Employee section uses plain text or rich text. This option is unchecked (rich text) by default. Rich text must be enabled in order to use text formatting options such as bold, italics, and underline on the Notes screen. This option must be left unchecked if WebEntry is installed.

**Process Coverage**
Defines whether or not EmpowerTime calculates the number of personnel that were on the clock for each segment within a day. When enabled, EmpowerTime builds two company-specific tables that contain the current and historical coverage information: UNPRCOV and UNHPRCOV. The length of coverage segments must be defined in the Coverage Interval field. Contact Empower Technical Support for more information on this feature.

**TIP:** The Process Coverage feature is commonly used in healthcare facilities that are required to report staff coverage levels to the government. Note that hours entered as pay records do not count toward staff coverage, as pay records are not associated with specific start and stop times.

**WARNING:** Do not enable the Process Coverage feature without assistance from empower Technical Support. Several stored procedures must be installed in order for this feature to work correctly. In addition, note that the Consolidate Payroll Segments option in the Company Setup notebook must be disabled in order for the process coverage feature to work correctly.
Coverage Interval
Defines the interval in minutes for the process coverage feature. The number entered in this field must be a factor of 1440 (the number of minutes in 24 hours). In other words, 1440 must be divisible by the number of minutes entered here. Commonly used segments include 10, 15, and 20 minutes.

3.6 Defining Organization Levels

Organization levels are logical groups used for organizing employees, tracking labor, filtering data, and sorting and ranging reports. Up to ten organization levels can be defined per company (not including job and shift, two additional but optional organization levels). The default EmpowerTime organization levels are Division, Location, and Department. Levels can be changed, deleted, and added. In complex labor tracking environments, additional organization levels are typically necessary.

Once all necessary organization levels have been created for a company, the codes for each level must be defined. For example, if two organization levels named Department and Location are set up in a company, the Department and Location codes must be entered under the Code Tables notebook. Later, when employee records have been set up, each employee can be assigned to a home Department and Location. Once employees start punching and EmpowerTime begins collecting data, reports can be run using Department and Location codes as sort and range fields.

![Figure 14: Organization Levels Setup](image)

The first time the Organization Levels section is opened, the three default organization levels and the Job Code level are displayed. Double-click or highlight a level and click Edit to configure it. The Job Code level cannot be renamed or deleted, but it does not have to be used.

Adding and Editing Organization Levels

Use the Add button to add a new level to the organization level structure. New levels are always added sequentially, from lowest to highest, so gaps cannot exist between levels in the structure. Organization level descriptions can be up to fifteen characters long and can include letters, numbers, spaces, and symbols.

Use the Edit button to change the properties of an organization level. The Update Information window, shown in the figure below, can be used to change level descriptions, validation options, and data type settings. The options available in this window are described below.
Description
Displays the name or description of the currently displayed organization level.

Validation
Defines whether or not validation is enabled for the currently displayed organization level. By default, EmpowerTime validates all organization levels. If validation is enabled and EmpowerTime finds an invalid labor detail code associated with a punch, that punch will not post to the employee’s timecard but rather will be placed in the Rejected Punches section. Leave this field unchecked to disable validation for an organization level.

EXAMPLE: If validation is enabled on the Department organization level and an employee transfers into an invalid department number (a department code that was not set up in the Code Tables section), the punch will be rejected as an invalid transfer.

TIP: Validation is usually only disabled when order numbers or other organization level codes change so quickly that it would be impossible to maintain a current list of codes. Keep in mind that most types of time clocks can be configured to validate organization level codes in order to prevent employees from entering invalid codes.

Data Type
Defines the kind of data that is to be stored within the corresponding organization level. The options available in the drop-down menu are Standard and Quantity. All organization levels are set to Standard by default.

Read Only
When this option is checked, EmpowerTime users will not be allowed to change the codes associated with this level from the timecard and pay record detail windows.

Swapping Organization Levels
Use the Swap Organization Levels option in the Organization Levels drop-down menu to change the order of organization levels. Swapping levels provides an easy way to change the organization level structure without having to add and delete levels. As shown in the figure below, EmpowerTime prompts for the organization levels to swap when this feature is activated.
Deleting an Organization Level

Use the **Delete** button to delete a level from the organization level structure. Levels are always deleted sequentially, from highest to lowest, so that gaps cannot exist between levels in the structure. EmpowerTime prompts for a confirmation prior to deleting a level, but there is no undo feature available to reverse changes after a level has been deleted from the organization level structure.

**WARNING:** Do not delete an organization level once EmpowerTime has started collecting punches and data unless instructed to do so by Empower Technical Support.
CHAPTER 4—CODE TABLES

4.1 Overview

This chapter describes the process of establishing organization codes in the Code Tables section. Organization codes are typically defined for each of the organization levels established in the Company Setup section. Depending on the configuration of EmpowerTime™, other organization codes that need to be defined may include job codes, shift codes, absence reason codes, audit reason codes, and time clock supervisor codes.

To access the Code Tables section, click on the Rules Setup drop-down menu and select Code Tables. The number of tabs available within the Code Tables section depends on the number of organization levels set up in the current company.

4.2 Organization Level Codes

The Code Tables notebook contains five standard tabs: Job, Shift, Absence Reason, Audit Reason, and Clock Supervisor. It also contains up to ten organization level tabs depending on the number of organization levels set up in the current company. Organization levels must be defined in the Organization Levels section found under Rules Setup → Company Setup before organization codes can be entered in the Code Tables notebook.

To define the codes that fall within an organization level, click on the appropriate tab and then click the Add button located at the bottom of the screen. Next, a dialog box will appear prompting for a code and description. Organization level codes can be up to...
12 characters long in levels one through five and up to 15 characters long in levels six through ten. Organization level codes may contain numbers, letters, spaces, and symbols. However, if employees will enter transfer punches at time clocks, keep in mind that codes must be created with characters that employees can enter on the time clock keypad.

![Job Information](image)

**Figure 18: Adding Code and Description**

Once the code and description have been defined, click Close to return to the Code Tables screen, or use the tool bar to add additional codes. To delete a code from the table, highlight the appropriate code and click the Delete button. New organization level codes can be added at any time if necessary.

**TIP:** If employees enter transfers at time clocks, try to use short numeric codes. An alternative to entering transfer codes by hand is to use bar codes that represent the transfer codes. Bar code badges can be swiped through badge readers, or wand readers can be used to scan bar codes. Contact Empower Technical Support for more information on bar codes and time clock functionality.

### 4.3 Job Codes

Job is a hard-coded organization level that is automatically set up in every company in EmpowerTime. Like other organization codes, job codes can be useful for sorting and ranging reports, filtering employee information, and tracking labor. Although the job level cannot be renamed or deleted, it does not have to be used. However, if jobs will be tracked, job codes must be defined in the Code Tables notebook.

To define job codes, click on the Job tab and follow the same procedure used to define codes on the other tabs in the Code Tables section. Like organization level codes, the codes defined on this tab should be short numeric codes if employees will enter job transfer punches at time clocks.
Job codes have the additional functionality of allowing for secondary jobs, a feature available in the Employee Setup notebook for activating pay rate changes when employees work different jobs. When used in this capacity, secondary jobs are similar to rate overrides. For more details on secondary jobs, see Chapter 12—Employee Setup.

4.4 Shift Codes

Shift is another organization level that is automatically set up in every company in EmpowerTime. Like other organization codes, shift codes can be used for sorting and ranging reports, filtering employee information, and tracking labor. Although the shift level cannot be renamed or deleted, it does not have to be used. However, if shifts will be tracked, shift codes must be defined in the Code Tables section.

To define shift codes, click on the Shift tab and follow the same procedure used to define codes on the other tabs in the Code Tables section. Like organization level codes, the codes defined on this tab should be short numeric codes if employees will enter shift transfer punches at time clocks. Shift codes are often used to activate shift premiums that modify employees’ standard pay when specific shifts are worked. Shift premiums can be calculated a number of different ways. Depending on the payroll
system and the nature of the policies, the premiums may be calculated by EmpowerTime or by the payroll system. For more details on shift premiums, see Chapter 6—Pay Classes and Chapter 7—Rate Override Classes.

**EXAMPLE ONE:** A 24-hour production facility has three shifts, and employees frequently work different shifts. When employees work outside of their default shifts, the rules defined in EmpowerTime automatically assign shift codes to the hours exported to payroll. The payroll program calculates premiums based on shift codes and adjusts employees’ standard rates of pay.

**EXAMPLE TWO:** The same facility purchases a new payroll system that cannot calculate shift premiums, so EmpowerTime is set up to calculate shift premiums before hours are exported to payroll. Rate override rules are defined in EmpowerTime; and, at the end of each pay period EmpowerTime passes straight dollar amounts to payroll instead of hours and shift codes.

### 4.5 Absence Reason Codes

Absence reason codes are used to specify the reason why an employee is absent on a scheduled workday. Absence reason codes are typically associated with pay records entered for absent employees, but they can also be linked to specific exceptions such as Tardy and Absent so that instances of those exceptions are associated with the corresponding reasons. Absence reason codes are optional but can be useful for tracking attendance problems.

![Figure 21: Absence Reason Codes](image)

The default absence reason codes may be added to, edited, and deleted as necessary. To define absence reason codes, click on the Absence Reasons tab and follow the same procedure used to define codes on the other tabs in the Code Tables section.
4.6 Audit Reason Codes

Audit reason codes are used to force EmpowerTime users to specify a reason each time changes are made to employees’ punches. Audit reason codes are optional and must be enabled in the System Options 1 section in the Company Setup submenu on the Rules Setup drop-down menu. If enabled, EmpowerTime always prompts users to select an audit reason code before accepting any timecard edits.

REMINDER: EmpowerTime automatically records all timecard edits including the date and time that punches were changed, the original punch date and time, the changed punch date and time, and the user who made the changes. Audit reason codes simply add another level of tracking, but the process of correcting and editing timecards is much slower if this feature is enabled. Audit reason codes are probably unnecessary unless many different supervisors are responsible for correcting timecards.

If the audit reason codes feature is enabled, a list of audit reason codes must be defined. Click the Audit Reasons tab and follow the same procedure used to define codes on the other tabs in the Code Tables section. Examples of commonly used audit reason codes are provided below.

![Figure 22: Audit Reason Codes](image)

**Clock Down**
A punch was manually added because a time clock was not functioning.

**Damaged Badge**
A punch was manually added because a time clock could not read a damaged badge.

**Lost Badge**
A punch was manually added because of an employee’s lost badge.

**Wrong Badge**
A punch was manually added because an employee assigned the wrong badge.

4.7 Clock Supervisor Codes

Clock supervisor codes are badge numbers assigned to supervisors who have permission to access advanced time clock management functions at Accu-Time time.
clocks. Supervisor badge numbers are downloaded to time clocks during polling. When a clock supervisor badge is swiped at a time clock that contains that badge number in memory, the clock is “unlocked” so that normal restrictions are released for the next punch.

**EXAMPLE:** A company’s policy stipulates that employees cannot enter punches when they forget their badges, so the number buttons on the time clock keypads are disabled. If an employee forgets his badge he must notify the supervisor, and the supervisor swipes a clock supervisor badge to unlock the restriction on keying badge numbers. After the supervisor badge has been swiped, the employee is able to punch by entering his or her badge number on the keypad.

To define clock supervisor codes, click on the **Clock Supervisors** tab and follow the same procedure used to define codes on the other tabs in the Code Tables section. Clock supervisor badge numbers can be up to nine characters long. Keep in mind that it may be necessary to place leading zeros before codes that are shorter than nine digits in order for time clocks to correctly read clock supervisor badges.

**WARNING:** Clock supervisor functionality is available only with select time clocks. Contact Empower Technical Support for more information on time clock functionality.
CHAPTER 5—PAY TYPES AND PAY TYPE GROUPS

5.1 Overview

This chapter describes the process of establishing pay type codes in the Pay Types section and organizing pay type codes into groups. Pay types define every kind of pay that employees can earn in EmpowerTime™. Examples of commonly used pay types include regular, overtime, double overtime, vacation, sick, holiday, and personal leave.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Factor</th>
<th>Pay Units</th>
<th>To Overtime</th>
</tr>
</thead>
<tbody>
<tr>
<td>BON</td>
<td>Bonus</td>
<td>1.0000</td>
<td>Dollars</td>
<td>No</td>
</tr>
<tr>
<td>DOT</td>
<td>Double Time</td>
<td>2.0000</td>
<td>Hours</td>
<td>No</td>
</tr>
<tr>
<td>HOL</td>
<td>Holiday</td>
<td>1.0000</td>
<td>Hours</td>
<td>No</td>
</tr>
<tr>
<td>OVT</td>
<td>Overtime pay</td>
<td>1.5000</td>
<td>Hours</td>
<td>No</td>
</tr>
<tr>
<td>PTO</td>
<td>Personal</td>
<td>1.0000</td>
<td>Hours</td>
<td>No</td>
</tr>
<tr>
<td>REG</td>
<td>Regular pay</td>
<td>1.0000</td>
<td>Hours</td>
<td>Yes</td>
</tr>
<tr>
<td>SAL</td>
<td>Salaries w/Hours</td>
<td>1.0000</td>
<td>Hours</td>
<td>No</td>
</tr>
<tr>
<td>SIC</td>
<td>Sick Pay</td>
<td>1.0000</td>
<td>Hours</td>
<td>No</td>
</tr>
<tr>
<td>VAC</td>
<td>Vacation</td>
<td>1.0000</td>
<td>Hours</td>
<td>No</td>
</tr>
</tbody>
</table>

Figure 23: Pay Types

To access the Pay Types section, select Pay Types in the Rules Setup drop-down menu.

5.2 Defining Pay Types

EmpowerTime is installed with two default pay type codes, REG for regular pay and OVT for overtime pay. These codes can be added to, edited, and deleted. The Add, Edit, and Delete buttons at the bottom of the screen are used for administering pay types. Double-clicking any pay type also activates the edit window.

To create a new pay type, click on the Add button and the pay type detail dialog box will appear. Enter a pay code in the Pay Code field. Pay type codes can be up to four characters long and may include letters, numbers, symbols, and spaces. Keep in mind that pay type codes should be easy for EmpowerTime users to understand and may need to match the codes established in your payroll software.

TIP: The pay types set up in EmpowerTime should be the same as those in payroll, but the codes may be different. For example, if ten pay types are defined in payroll, ten pay types will be required in EmpowerTime. However, if the code for vacation pay is 005 in payroll, a letter code like VAC may be established in EmpowerTime. A payroll interface module can be used to map the codes so information transfers properly.
The **Pay Type Details** window appears when a new pay type is added or an existing pay type is edited. The options in this window are described below.

**Pay Code**
Displays the code of the current pay type. Codes can be up to four characters long.

**Description**
Displays the description of the current pay type.

**Pay Factor**
Displays the pay factor of the current pay type. Pay factors are multiplied by pay rates to achieve hourly totals. Regular pay is usually set up with a pay factor of 1, while overtime usually has factor of 1.5.

**Accumulate Toward Overtime**
Defines whether or not hours of the current pay type accumulates toward daily, weekly, or biweekly overtime. Some pay types, such as sick leave, may not accumulate toward overtime depending on company policies. Setting this field to **Yes** causes hours of that pay type to accumulate toward overtime thresholds.

**Pay Units**
Defines whether the current pay type is an hours or dollars pay type. Hourly pay types are used for worked hours, and dollar pay types are used for total dollar pay record entries (e.g., tips or bonuses).

**Default Reason**
Defines the default absence reason code associated with the current pay type. Default absence reason codes are optional, and some pay types (such as regular and overtime) may not require default reason codes. Keep in mind that default reason codes are
automatically assigned to pay records only if the Auto Reason Code feature in the Company Setup section is enabled. Absence reason codes must be defined in the Code Tables section.

**Overtime Pay Overrides**
Defines whether or not overtime hours override the current pay type when EmpowerTime calculates overtime.

**EXAMPLE:** Regular, overtime, and vacation are the only three pay types. The Accumulate Toward Overtime and Overtime Pay Overrides options are set to Yes for both the regular and vacation pay types. An employee works 30 hours of regular time, then takes two 8 hour days of vacation. Weekly overtime occurs at 40 hours, so EmpowerTime calculates 30 hours of regular, 10 hours of vacation, and 6 hours of overtime for the week. If Overtime Pay Overrides is unchecked for vacation pay, the final calculation changes to 24 hours of regular, 16 hours of vacation, and 6 hours of overtime.

### 5.3 Pay Type Groups

Pay type groups allow pay types to be summarized into groups on the employee timecard and employee approval screens. A company could, for example, create pay type groups for worked and non-worked time. The worked pay type group would contain regular, overtime, and other pay types associated with employee punches. The non-worked group could include vacation, personal, holiday, and other records not associated with punches. The pay type groupings appear in the timecard summary and as column headers when performing timecard approvals.

![Figure 25: Pay Period Summary Grouped by Pay Type Groups](image)

Pay type groups can be accessed by going to Rules Setup → Pay Type Groups. This chart displays the groups that are already set up for the selected company.

![Figure 26: Pay Type Groups](image)
Pay type groups can be configured by clicking on the Add or Edit buttons. The available pay types are listed in the left pane.

![Pay Type Groups Configuration](image)

**Figure 27: Pay Type Groups Configuration**

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
</table>

**Code**

The code is a unique identifier associated with the pay type group. This is the code that will display in the timecard summary and employee approval sections.

**Description**

The description is used to provide more description than the code provides.

**Pay Units**

Each pay type group contains only hours or dollars pay types. Choose **Hours** for regular, overtime, vacation and other pay types tracked with hourly records. Choose **Dollars** for tips, bonuses, and other pay types that track dollar amounts.

**Pay Types**

Double-click a pay type in the **Available Pay Types** column to include it in the displayed pay type group. Each pay type can only be included in one pay type group.
CHAPTER 6—PAY CLASSES

6.1 Overview

Pay classes are groups of rules that govern how EmpowerTime™ handles employees’ punches and hours. For instance, pay class rules determine how and when punches are rounded, which pay type codes are used in various situations, and the length of lunch breaks. Multiple pay classes may be created for different groups of employees that are subject to different policies. All active employees must be assigned to a pay class in the Time Attendance screen in the Employee section.

The Pay Classes screen can be navigated to by selecting Pay Classes from the Rules Setup drop-down menu. The Pay Classes screen contains ten tabs, each of which contains a different category of rules. Each pay class created in the Pay Classes screen includes a unique set of the ten tabs. The contents of these tabs are summarized below.

Overtime/Policies
Contains overtime, consecutive days worked, and end-of-day time settings.

Rounding
Contains punch, daily total, and custom rounding rules.

Schedule Rounding
Contains rules for rounding in relation to employees’ schedules.

Shift Premiums
Contains rules for shift premium scenarios.

Weekly Premiums
Contains rules for weekly premium scenarios.

Restriction
Contains restriction rules that can prevent employees from punching at time clocks outside of specific times.

Miscellaneous
Contains miscellaneous rules including approvals and labor distribution.

Special
Contains special rule options such as pay to standard and blended overtime.

Lunch/Break
Contains lunch and break rules including standard lunch minutes and automatic lunch deduction settings.

TIP: Pay classes rarely require rule settings on all nine tabs of the Pay Classes notebook. The most commonly used pay class rules are on the top set of tabs.
6.2 Creating and Copying Pay Classes

You can add a new pay class by clicking on the add button. Adding or editing pay classes will bring up the pay class detail window, as shown in the following figure. Pay class codes can be only two characters long and must be numeric. Additional pay classes can be created at any time by clicking the add button on the toolbar located at the top of the pay class detail window.

Multiple pay classes are typically necessary in order to accommodate different groups of employees, but in many cases there are only one or two different settings in each pay class. If multiple pay classes share similar rules, it is easier to create a pay class and copy it rather than creating multiple pay classes from scratch. Once a pay class is copied, the new pay class can be reconfigured for any rules that differ from the original pay class.

To copy a pay class, select the pay class to be duplicated from the list of pay classes, then select Processes from the drop-down menu at the top of the screen and select Duplicate Pay Class from the Pay Classes drop-down menu. Assign a new code and description to the new pay class then make any necessary changes to the pay class rules.

![Figure 28: Pay Classes](image-url)
6.3 Overtime/Policies Tab

The Overtime/Policies tab contains many important rules such as overtime thresholds, consecutive days worked policies, and the End Of Day time setting. Some of the fields on this tab are required in order for a pay class to correctly handle employees’ hours, while other fields may be optional depending on the policies covered by a particular pay class. Explanations of the fields on this tab are provided below.

Figure 29: Overtime/Policies Tab in Pay Class Setup

**Regular Pay Type**
Defines the default pay types to be used in regular, overtime, and double overtime situations when employees work Monday through Friday. Use the drop-down menu to select the appropriate pay types from the drop-down menus.

**Saturday Pay Type**
Defines the default pay types to be used in regular, overtime, and double overtime situations when employees work on Saturdays. These fields should not differ from those in the Regular Pay Type set if employees do not earn different pay types simply for working on Saturdays. Use the drop-down menu to select the appropriate pay types from the drop-down menus.

**EXAMPLE:** Employees automatically receive overtime pay for working on Saturdays, regardless of how many hours have been worked in a week. In addition, employees receive double overtime if they have already worked 40 hours in a week and are called in on a Saturday. To account for this policy, the Saturday Pay Type fields are configured with the overtime pay field and the double overtime pay type in both the Overtime and Double Overtime fields.
Sunday Pay Type
Defines the default pay types to be used in regular, overtime, and double overtime situations when employees work on Sundays. These fields should not differ from those in the Regular Pay Type set if employees do not earn different pay types simply for working on Sundays. Click on the drop-down to select the appropriate pay types from the drop-down menus.

6th Consecutive Day
Defines the default pay types to be used in regular, overtime, and double overtime situations when employees work six consecutive days. To enable this feature place checkmark in the box, select the appropriate pay types from the drop-down menus, and define whether the consecutive days must occur in the same work week or are allowed to span work weeks using the drop-down menu along the right side of the screen.

7th Consecutive Day
Defines the default pay types to be used in regular, overtime, and double overtime situations when employees work seven consecutive days. To enable this feature place checkmark in the box, select the appropriate pay types from the drop-down menus, and define whether the consecutive days must occur in the same work week or are allowed to span work weeks using the drop-down menu along the right side of the screen.

**EXAMPLE:** Employees receive automatic overtime on the seventh consecutive day worked, regardless of the total number of hours for the week. In addition, employees receive automatic double overtime if they have already worked 40 hours in a week and are called in on a seventh consecutive day. To account for this policy the 7th Consecutive Day rule is configured with the overtime pay type in the Regular field and the double overtime pay type in both the Overtime and Double Overtime fields.

Salaried Pay Type
Defines the default pay type to be used for all hours automatically paid to employees by the Pay To Standard or Salary With Hours features. Employees assigned this status automatically receive a set number of hours each pay period without punching. For more information on this option see Chapter 12—Employee Setup for salaried with hours. For more information on pay to standard, see the Special tab section of this chapter.

Consecutive Pay Types
Defines the pay types that are considered Worked pay types when calculating consecutive days worked. This field must be configured in order for the 6th Consecutive Day and 7th Consecutive Day policies to function correctly. To specify the pay types that represent worked days, click the browse button and select all appropriate pay types from the pop-up window.

**EXAMPLE:** Suppose that the seventh consecutive day policy described in the above example only counts days of regular, overtime, or double overtime hours as worked days. An employee assigned to this pay class works four days, takes a day of vacation, and then returns and works on the following two days. Although this employee earned pay over seven consecutive days, the vacation day is not counted and the employee cannot receive the special pay type for the seventh day.
Daily OT After
Defines the number of hours in a day after which employees qualify for the Overtime pay type. Daily overtime is typically paid to employees who work more than eight hours in a day. Enter 999 to disable this option.

Daily Double OT After
Defines the number of hours in a day after which employees qualify for the Double Overtime pay type. Daily double overtime is typically paid to employees who work more than ten hours in a day. Enter 999 to disable this option.

Daily OT Applies Per
Determines whether daily overtime is applied per shift or per payroll day. This setting is generally used when employees work more than one shift in a day.

Weekly OT After
Defines the number of hours in a week after which employees qualify for the Overtime pay type. Weekly overtime is typically paid to employees who work more than 40 hours in a week, so the default setting for this field is 40. Enter 999 to disable this option.

Weekly Double OT After
Defines the number of hours in a week after which employees qualify for the Double Overtime pay type. Weekly double overtime is typically paid to employees who work more than 60 hours in a week. Enter 999 to disable this option.

Biweekly OT After
Defines the number of hours in a biweekly pay period after which employees qualify for the Overtime pay type. Biweekly overtime is typically paid to employees who work more than 80 hours in a biweekly pay period. This option should be enabled only if employees work biweekly pay periods and do not earn weekly overtime. Enter 999 to disable this option.

Biweekly Double OT After
Defines the number of hours in a biweekly pay period after which employees qualify for the Double Overtime pay type. Biweekly double overtime is typically paid to employees who work more than 120 hours in a biweekly pay period. This option should be enabled only if employees work biweekly pay periods and do not earn weekly double overtime. Enter 999 to disable this option.

End Of Day Time
Defines the time at which work days end. Punches entered after the End Of Day time are counted toward the next day. The default setting of 23:59 (11:59 p.m.) is typically changed only in facilities that remain open 24 hours a day.

**EXAMPLE:** If the End Of Day time is set at 23:00, an employee who punches In For Day at or before 23:00 will have his hours for that shift charged to the current calendar day. If the In For Day punch is logged at 23:01 or later, his hours for that shift will be charged to the following day.

**TIP:** To accommodate a shift that spans midnight, establish an end-of-day time that is at least half an hour before the start of the last shift. For example, if the last shift starts
at 23:00, the End Of Day time should be set to 22:00 or 22:30 so that employees who punch in early do not have their hours charged to the wrong day.

**Apply Overtime To**

Defines which organization level(s) are charged when overtime hours are earned. If employees transfer to departments, jobs, etc. outside of their home assignments, this feature can be used to charge overtime hours first to those jobs or departments away from home. Overtime hours that exceed the number of hours spent on transfers are charged to the home codes. To enable this feature, click the Overtime button and select the appropriate level(s). Be sure to organize the levels so that the top level is the level to which overtime is first applied.

![Figure 30: Apply Overtime To](image)

**EXAMPLE:** Suppose that Department is selected as the first level to be charged for overtime hours and that weekly overtime is paid after 40 hours. If an employee assigned to this pay class worked 45 hours in a week, 10 of which were worked in a department other than his or her home department, the five hours of overtime would be charged to the department into which the employee had temporarily transferred during the week, regardless of when in the week the employee worked in the other department.
6.4 Rounding Tab

The Rounding tab contains rules for standard punch rounding, custom punch rounding, daily total rounding, and additional daily minutes. By default, this tab is configured to round to the nearest minute (no rounding) under all circumstances. No adjustments need be made to this tab if punches and daily totals will not be rounded for employees assigned to the current pay class.

**TIP:** If employees are assigned to schedules in EmpowerTime, punches may be rounded to scheduled start and stop times using schedule rounding rules. Schedule rounding rules are described in the next section.

**Punch Rounding Rules**

This section of the Rounding tab contains rules for rounding different types of punches. Four methods of rounding are available for each punch type. Punches can be rounded forward, backward, or to the nearest time increment defined. In addition, custom rounding policies can be defined for any of the punch types. Click any of the drop-down menus under the Rule column to view these options.

To establish a rounding policy for a punch type, select a rounding method from the drop-down menu and define an increment in minutes in the corresponding field to the right. Some of the most commonly used rounding rules are nearest quarter hour (15 minutes), nearest tenth of an hour (6 minutes), and nearest five minutes. Custom rounding rules require additional configuration as described later in this section.

**WARNING:** Be sure to check local, state, and union laws before establishing rounding policies. If rounding rules are changed, be sure to clearly post the new rounding policies to avoid any misunderstanding by employees.

**In-Day**

Defines the type of rounding to be applied to In For Day punches.

**Out-Day**

Defines the type of rounding to be applied to Out For Day punches.
Out-Lunch
Defines the type of rounding to be applied to Out For Lunch punches.

In-Lunch
Defines the type of rounding to be applied to In From Lunch punches.

Out-Break
Defines the type of rounding to be applied to Out For Break punches.

In-Break
Defines the type of rounding to be applied to In From Break punches.

Transfers
Defines the type of rounding to be applied to transfer punches. This rule applies to all types of transfer punches.

Daily Total Rounding Rules

This section of the Rounding tab contains rules for rounding different kinds of hourly totals such as break totals, lunch totals, daily totals, and weekly totals. These rounding options are described below.

Breaks
Defines the type of rounding to be applied to total daily break minutes. Out For Break and In From Break punches are always rounded first according to punch rounding rules before total break minutes are added up and rounded as specified by this rule.

Lunch
Defines the type of rounding to be applied to total daily lunch minutes. Out For Lunch and In From Lunch punches are always rounded first according to punch rounding rules before total lunch minutes are added up and rounded as specified by this rule.

Daily Total
Defines the type of rounding to be applied to total daily minutes. In For Day and Out For Day punches are always rounded first according to punch rounding rules, and lunch and break minutes are calculated and deducted, before the resulting daily total is rounded as specified by this rule.

Week Total
Defines the type of rounding to be applied to total weekly minutes. This rounding rule is activated only after all other punch and hourly total rounding rules have been applied.

**WARNING:** When weekly total rounding is used, the last segment of hours in a week is rounded in order to produce a rounded total for the week. For example, suppose the weekly total rounding rule is set to the nearest 15 minutes and an employee assigned to the pay class works Monday through Thursday for a total of 32 hours and 6 minutes, then takes 8 hours of vacation on Friday. As a result of the rule, the 8 hours of vacation on Friday would be rounded to 7 hours and 54 minutes to produce an even weekly total of 40 hours.
Additional Minutes Rules

This section of the Rounding tab contains rules for adding additional minutes to employees' In For Day and Out For Day punches. When activated, additional minutes are added to the rounded punch time in employees' timecards after all other rounding rules have been executed.

**EXAMPLE:** Employees are required to clock out before washing up at the end of the day and are paid ten additional minutes for clean-up time. To account for this policy, the Out For Day field in the Additional Minutes section is set to 10. An employee assigned to this pay class punches out at 15:00, and the punch is rounded forward to 15:10 to pay the additional minutes.

Custom Rounding

The Custom Rounding feature is used to customize rounding parameters for situations in which the Nearest, Forward, and Back rounding rules do not adequately meet rounding policies. The nearest rounding rule automatically rounds time based on an even split of the minutes. With a custom rounding policy, the threshold for rounding forward or back to quarter hour increments can be changed.

To establish a custom rounding policy, set the punch rule type to Custom and define the number of minutes of the rounding increment. Then, click the Custom button at the bottom of the tab to open the Custom Rounding window as shown below. Numbers defined in the Minutes column on the Rounding tab automatically appear in the corresponding Minutes column in the Custom Rounding window. To define the threshold for custom rounding, enter a number into the Minutes Worked To Receive column.

![Custom Rounding](image)

Figure 32: Custom Rounding
EXAMPLE: Employees assigned to the current pay class should have all In For Day punches rounded to fifteen-minute intervals, but employees are not allowed to punch in more than three minutes late. If employees punch in up to three minutes late, their punches should be rounded back to the nearest quarter-hour. If employees punch in four or more minutes late, their punches should be rounded forward to the nearest quarter-hour. To establish this policy, the rule for In For Day punches is set to Custom, and the Minutes field is set to 15. In the Custom Rounding window, the Minutes Worked To Receive column is set to 12, indicating that 12 of the first 15 minutes of the day must be worked in order to receive all 15 minutes of time. Employees assigned to this pay class can then punch in up to 3 minutes late without being penalized for 15 minutes of time.

REMINDER: The figure defined in the Minutes column on the Rounding tab automatically appears in the Custom Rounding window. Minutes figures must be defined in the Rounding tab.

6.5 Schedule Rounding Tab

This Schedule Rounding tab contains rules that define how employees’ in, out, and lunch punches are rounded on workdays for which they are scheduled. By default, no schedule rounding rules are established on new pay classes, so this tab does not require configuration if employees will not be scheduled in EmpowerTime or if schedule rounding rules are unnecessary.

REMINDER: Schedule rounding rules always override standard rounding rules when employees work on days for which they are scheduled. If an employee punches on a day for which he or she is not scheduled, only the standard rounding rules are applied to his or her punches. For more information on setting up and using schedules, see Chapter 13—Schedules and Schedule Templates.
Grace Minutes Options

This section of the Schedule Rounding tab is used to establish grace periods around specific segments of the day. Grace periods can be established before and after scheduled In For Day times, before and after scheduled Out For Day times, and before and after scheduled lunch breaks. When grace periods are defined, the corresponding schedule rounding rules are applied only within the grace periods. In addition, exceptions like Early In and Tardy are suppressed if generated by punches that were entered within a grace period. All grace period options are described below, and schedule rounding rules are described in the next section.

Before Start
Defines the maximum number of minutes before scheduled start times in which employees can punch In For Day without generating Early In exceptions. Also used for the Round Within Grace On Early In feature (described below).

After Start
Defines the maximum number of minutes after scheduled start times in which employees can punch Out For Day without generating Tardy exceptions. Also used for the Round Within Grace On Late In feature (described below).

Before Stop
Defines the maximum number of minutes before scheduled stop times in which employees can punch Out For Day without generating Early Out exceptions. Also used for the Round Within Grace On Early Out feature (described below).

After Stop
Defines the maximum number of minutes after scheduled stop times in which employees can punch Out For Day without generating Late Out exceptions. Also used for the Round Within Grace On Late Out feature (described below).

Before Lunch Start
Defines the maximum number of minutes before employees' scheduled lunch start times in which employees are allowed to punch Out For Lunch without generating Early Out For Lunch exceptions. This field is not used for schedule rounding on lunch punches.

After Lunch Stop
Defines the maximum number of minutes after employees' scheduled lunch stop times in which employees are allowed to punch In From Lunch without generating Tardy In From Lunch exceptions. This field is not used for schedule rounding on lunch punches.

Round to Schedule Options

Several different schedule rounding options are available in the center section of the Schedule Rounding tab. When enabled, these options interact with any grace periods that have been defined. When disabled, the corresponding rounding rule along the right side of the tab is used as the default rule in applicable situations. The schedule rounding options are explained below.

On Early In
Defines whether or not all Early In punches are rounded up to employees’ scheduled start times. If this option is checked, all early In For Day punches are rounded up to scheduled start times regardless of any Before Start grace period. If left unchecked, all Early In punches are rounded according to the rounding rule and minute interval defined to the immediate right of this field. If this option is left unchecked and a Before Start grace period is defined, only punches before the grace period are subject to the rule and minute interval defined to the right.

Within Grace On Early In
Defines whether or not punches within the Before Start grace period are rounded up to employees’ scheduled start times. If this option is checked, all early In For Day punches within the grace period are rounded up to scheduled start times.

EXAMPLE: Employees commonly punch in early before shifts begin. Employees rarely show up more than 15 minutes early unless supervisors specifically ask them to arrive early. To accommodate this behavior, a Before Start grace period of 15 minutes is defined. The Round To Schedule Within Grace On Early In option is checked, and the Round To Schedule On Early In option is left unchecked. Finally, the rule for early in punches outside of the grace period is set to Nearest 5 Minutes. Employees assigned to this pay class who punch in up to 15 minutes early are paid only from their scheduled start times. Any In For Day punches recorded more than 15 minutes early are rounded to the nearest five-minute interval.

Within Grace on Late In
Defines whether or not punches within the After Start grace period are rounded back to employees’ scheduled stop times. If this option is checked, all late In For Day punches within the grace period are rounded back to scheduled start times.

On Late In
Defines whether or not all Late In punches are rounded back to employees’ scheduled start times. If this option is checked, all late In For Day punches are rounded back to scheduled start times regardless of any After Start grace period. If left unchecked, all late in punches are rounded according to the rounding rule and minute interval defined to the immediate right of this field. If this option is left unchecked and an After Start grace period is defined, only punches after the grace period are subject to the rule and minute interval defined to the right.

On Early Out
Defines whether or not all Early Out punches are rounded up to employees’ scheduled stop times. If this option is checked, all early Out For Day punches are rounded up to scheduled stop times regardless of any Before Stop grace period. If left unchecked, all early out punches are rounded according to the rounding rule and minute interval defined to the immediate right of this field. If this option is left unchecked and a Before Stop grace period is defined, only punches before the grace period are subject to the rule and minute interval defined to the right.

Within Grace on Early Out
Defines whether or not punches within the Before Stop grace period are rounded up to employees’ scheduled stop times. If this option is checked, all early Out For Day punches within the grace period are rounded up to scheduled stop times.
Within Grace on Late Out
Defines whether or not punches within the *After Stop* grace period are rounded back to employees’ scheduled stop times. If this option is checked, all late Out For Day punches within the grace period are rounded back to scheduled stop times.

**EXAMPLE:** Employees commonly have to wait in line at a time clock in order to punch out at the end of a shift. Employees rarely punch out more than five minutes late as a result of line, but supervisors occasionally ask them to stay late to finish a job. To accommodate this behavior, an *After Stop* grace period of five minutes is defined. The *Round To Schedule Within Grace On Late Out* option is checked, and the *Round To Schedule On Late Out* option is left unchecked. Finally, the rule for late out punches outside of the grace period is set to *Nearest 5 Minutes*. Employees assigned to this pay class who punch out up to five minutes late are paid only up to their scheduled stop times. Out For Day punches recorded more than five minutes after scheduled stop times are rounded to the nearest five-minute interval.

On Late Out
Defines whether or not all Late Out punches are rounded back to employees’ scheduled stop times. If this option is checked, all late Out For Day punches are rounded back to the scheduled stop times regardless of any *After Stop* grace period. If left unchecked, all late out punches are rounded according to the rounding rule and minute interval defined to the immediate right of this field. If this option is left unchecked, and an *After Stop* grace period is defined, only punches after the grace period are subject to the rule and minute interval defined to the right.

### 6.6 Lunch/Break Rules Tab

The **Lunch/Break Rules** tab contains rules that define the lunch and break policies for each pay class. The rules on this tab include whether or not lunches are automatically deducted, the length of standard lunches, and the number and length of breaks available to employees. Explanations of the fields on this tab are provided on the next page.

Figure 34: Lunch/Break Tab in Pay Class Setup
NOTES

**TIP:** Lunch and break rules are often the only differences between pay classes. Be sure to create a separate pay class for every different lunch and break policy. Employees must be assigned to the correct pay classes in order for EmpowerTime to correctly handle lunch and break deductions.

**Automatic Lunch Deduction**
Defines whether or not lunch breaks are automatically deducted from employees’ timecards. Check this option if lunch minutes should be deducted without requiring employees to punch out and in from lunch. Automatic deductions are disabled on days when employees punch out and in for lunch.

**TIP:** Many businesses enable the Automatic Lunch Deduction feature but require employees to punch out if they leave the building. Enabling this feature ensures that lunch minutes are automatically deducted only if an employee does not punch out. Automatic lunch deductions can always be disabled for a particular day on an employee’s timecard if necessary.

**Minimum Hours For Auto Lunch**
Defines the minimum number of hours that employees must work in order to receive an automatic lunch deduction. Lunch minutes will not be deducted from employees who work fewer hours in a day than the number specified in this field. The Automatic Lunch Deduction feature must be enabled to use this feature.

**Interpret IDA Punch As Lunch**
Defines whether or not an IDA (In For Day Again) punch signifies that the employee punched out for lunch, thereby disabling the automatic lunch deduction for the day. If this option is checked, employees who punch Out For Day and then punch In For Day again are not charged with an automatic lunch deduction for the day.

**REMINDER:** If an employee punches In For Day and later punches Out For Day, then returns and punches In For Day again, the second In For Day punch is automatically converted to an In For Day again (IDA) punch and the two segments of hours are grouped together under one daily total. EmpowerTime only converts In For Day punches to In For Day again punches if the elapsed time (between an Out For Day punch and the following In For Day punch) is less than the Max Out Time setting defined on the System Options 1 screen in the Company Setup section.

**Deduct After**
Defines the number of hours in a day after which lunch minutes are automatically deducted. This feature is primarily used to ensure that lunch minutes are deducted from the correct segment of the day for accurate labor tracking.

**EXAMPLE:** Employees start work at 8:00 every morning and transfer between different job codes throughout the workday. Employees take a half-hour lunch every day at noon, lunch minutes are automatically deducted. To ensure that the 30 minutes of lunch are deducted from the correct job codes in which employees work on any given day, the Deduct After field is set to four hours in all pay classes. If this field were left blank, the 30 minutes of lunch would be deducted from the last jobs worked every day.
Standard Lunch Minutes
Defines the standard number of lunch minutes for employees assigned to the current pay class. EmpowerTime uses this setting as the basis for rounding and automatically deducting lunch minutes.

If Actual Lunch Time Is Less Than Standard, Then Deduct
Defines the rounding rule to be employed if an employee’s total lunch minutes in a day are less than the Standard Lunch Minutes defined in the current pay class. Three choices are available in the drop-down menu. Standard indicates that the standard number of lunch minutes should be deducted. Actual indicates that the actual number of minutes should be deducted. None indicates that no lunch minutes should be deducted.

EXAMPLE: Employees are allowed to take 30-minute lunches as defined in the Standard Lunch Minutes field, but one employee takes a short 20-minute lunch. If Standard is selected, EmpowerTime deducts the full 30-minute lunch rather than the 20 minutes actually taken. If Actual is selected, EmpowerTime deducts only the 20 minutes for lunch. If None is selected, no time is deducted for lunch.

If Actual Lunch Time Is Equal To Standard, Then Deduct
Defines the rounding rule to be employed if an employee’s total lunch minutes in a day are equal to the Standard Lunch Minutes defined in the current pay class. Three choices are available in the drop-down menu. Standard indicates that the standard number of lunch minutes should be deducted. Actual indicates that the actual number of minutes should be deducted. None indicates that no lunch minutes should be deducted.

If Actual Lunch Time Is Greater Than Standard, Then Deduct
Defines the rounding rule to be employed if an employee’s total lunch minutes in a day are greater than the Standard Lunch Minutes defined. Five choices are available in the drop-down menu. Standard indicates that the standard number of minutes for lunch should be deducted. Actual Breaks indicates that the actual time taken, minus any time taken for breaks, should be deducted. Actual indicates that the actual number of lunch minutes should be deducted. Difference indicates that the difference between standard and actual lunch minutes should be deducted. None indicates that no lunch minutes should be deducted in this situation. Regardless of the option selected here, a Lunch Too Long exception is generated when employees take lunches longer than the standard lunch minutes.

EXAMPLE: Employees are allowed to take 30-minute lunches as defined in the Standard Lunch Minutes field, but one employee takes a 40-minute lunch. If Standard is selected, EmpowerTime deducts only the standard 30 minutes. If Actual Breaks is selected, EmpowerTime deducts the actual minutes taken minus the number of minutes on which the employee was punched out on breaks. If Actual is selected, EmpowerTime deducts all 40 minutes. If Difference is selected, EmpowerTime deducts the difference between the standard and actual lunch minutes, so only 10 minutes are deducted. If None is selected, the employee is paid for all 40 minutes of lunch.

TIP: Most companies deduct the standard number of lunch minutes when employees take less than the Standard Lunch Minutes and deduct the actual lunch minutes when the time taken is greater than the Standard Lunch Minutes.
Click on the Rules button next to Multiple Lunch to access the Multiple Lunch Setup window.

![Multiple Lunch Setup](image)

**2nd Automatic Lunch Deduction**
This option enables a second automatic lunch deduction for employees assigned to this pay class. If this field is checked, the Minimum Hours For 2nd Auto Lunch and 2nd Auto Lunch Deduct After fields must also be populated.

**Minimum Hours for 2nd Auto Lunch**
Enter the minimum number of hours that an employee must work to have a second automatic lunch deduction minus the minutes that would be deducted for the first lunch. Second lunches are not independent of first lunches. They are calculated after the first lunch has already been subtracted from the total hours worked. This field has no effect unless the 2nd Automatic Lunch Deduction field is checked.

**2nd Auto Lunch Deduct After**
This determines the portion of the shift that the second automatic lunch will deduct from. If this field was set to 10 with a standard lunch time of one hour, EmpowerTime will deduct the time worked from the beginning of the employee’s tenth hour to the beginning of their eleventh. This is only important if the employee has transfers, or changes the detail of their shift. This field has no effect unless the 2nd Automatic Lunch Deduction field is checked.

**Multiple Worked Lunch Qualifications**
The three rows of data labeled Greater Than Hours determine the number of worked lunches an employee is entitled to throughout their shift. For example, an employee could be entitled to a single lunch break after 6 hours, and a second after 12 hours. This would require the first row’s number of hours worked set to 6 and the associated number of lunches set to 1. The second row would be set for 12 hours worked and 2 lunches. This field controls the generation of the No Lunch Taken and Too Many Lunches exceptions.
**Standard Break Minutes**
Defines the standard number of minutes employees are allowed for breaks. EmpowerTime uses this setting as the basis for rounding and deducting break minutes.

**Greater Than Hours and Number Of Breaks**
Defines the number of breaks employees are allowed based on the number of hours worked in a day. Three different definitions may be made to account for various work situations as demonstrated in the example below.

**EXAMPLE:** Employees are allowed up to three breaks per day depending on the total number of hours worked. In a standard eight-hour day, employees should only take two breaks, but three breaks are allowed if employees work more than 12 hours in a day. To define this policy, the break fields are set up as shown below.

<table>
<thead>
<tr>
<th>Greater than hours:</th>
<th>Number of breaks:</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>12</td>
<td>3</td>
</tr>
</tbody>
</table>

**Deduct Excess Break Time**
Defines how excess break minutes are handled if employees take more than the allowed number of break minutes. Four options are available in the drop-down menu. If No is selected, excess break time is not deducted. If Per Break is selected, excess time is deducted on a per break basis. If Total Breaks is selected, time is deducted only if the total break time taken is greater than the total allowed for all breaks together. If Blackout (Labor Distribution Times) is selected, time is deducted only for break minutes that occur outside of the standard break times as defined in the Labor Distribution feature on the Miscellaneous tab. EmpowerTime will not deduct time if the length of all breaks is less than or equal to the total allowed break minutes.

**EXAMPLE:** Employees work on a manufacturing line that requires all individuals to be present when the line is running, so employees are required to take breaks at the same time. All breaks are defined in the Labor Distribution feature on the Miscellaneous tab, and the Deduct Excess Break Time field is set to Blackout (Labor Distribution Times). One of the standard breaks is from 10:00 to 10:15. If an employee is out on break from 10:01 to 10:16, one minute is deducted from his timecard because the line could not operate during the extra minute.

**WARNING:** Although breaks must be defined in the Labor Distribution feature in order to use the Blackout (Labor Distribution Times) option, the Labor Distribution feature should not be enabled when this option is in use.

### 6.7 Shift Premiums Tab

The Shift Premiums tab contains rules for any premiums employees are eligible to earn for working on specific shifts. Shift premiums define shifts on one or more days that are associated with shift numbers or the special pay types employees receive for working those shifts. An unlimited number of shift premium rules can be defined in each pay class.
Although shift premiums can assign special pay types and shift codes to qualifying hours, they cannot be used to directly adjust employees’ rates of pay. In most cases, the pay types or shift codes assigned to hours by shift premium rules are used to activate rate override rules that adjust employees’ pay rates. Alternatively, many payroll systems can adjust pay rates based on the shift codes and or pay types EmpowerTime assigns to hours. For more details on rate overrides, see Chapter 7—Rate Override Classes.

EXAMPLE: Employees who work from 23:00 to 7:30 are paid an extra 50 cents per hour. Whenever employees work this shift, a shift premium rule assigns shift code 03 to the qualifying hours. A rate override rule then adjusts employees’ pay rates with the premium for all hours assigned to shift code 03.

Explanations of the fields on this tab are provided below.

**Activate**
Defines whether or not the rules on the **Shift Premiums** tab are activated. By default, the **Shift Premiums** tab is deactivated in all new pay classes.

**Majority Rules**
Defines whether or not employees assigned to the pay class can earn multiple premiums when their hours cross shifts and shift premium rules. If this option is checked, segments of work are applied only to the shift premium in which the majority of the hours fall. If left unchecked, an employee’s time can be segmented and applied to multiple shifts.

To define shift premium rules, click the **Add** button in the toolbar along the left side of the **Shift Premiums** tab. To adjust premium rules that have already been established, click the **Edit** button or double-click the desired premium. The Shift Premium Setup window, shown in the following figure, is used when adding or editing shift premium rules. The buttons along the bottom of the screen allow changes to be added and canceled and for users to exit the Shift Premium Setup window.
Shift premium rules are conditional statements that allow shift codes, pay types, lunch rules, or payroll dates to be changed based on the time of day and day of week worked by the employee. For example, a conditional rule satisfied by shift premiums could be that if an employee works between 3 p.m. and midnight, then that employee has Shift Code 2 assigned to those hours. To define a premium, establish all necessary qualifiers and codes to receive. Add as many different premiums as are necessary to meet the shift premium scenarios employees might work throughout a workweek.

![Shift Premium Setup](image)

**Qualifiers**

Qualifiers determine when shift premiums take effect. The only qualifiers that must be defined for all shift premiums are **Start Time** and **Stop Time**. All available qualifiers are explained below.

**Start Time**
Defines the start time of the shift.

**Stop Time**
Defines the stop time of the shift.

**WARNING:** All 24 hours in a day must be accounted for when establishing shift premiums. Even if premiums are paid for only one or two shifts, all shift start and stop times per day must be defined.
Grace Minutes
Defines the number of minutes before a shift starts employees are allowed to work and still receive the premium. Also defines the number of minutes after a shift ends employees can work and still receive the premium.

Minimum Hours
Defines the minimum number of hours employees must work during a shift in order to receive the premium.

IND Punch Window
Defines the times between which employees must punch in for the day in order to qualify for the premium. To activate this feature, check the box and define before and after times.

**EXAMPLE:** Employees earn an extra fifty cents per hour for all hours worked between 15:00 and 23:00. However, employees that arrive more than five minutes late for work are not eligible for the premium. To enforce this policy, an **IND Punch Window** is established between 14:45 and 15:05 and **Minimum Hours** is set to zero.

OUTD Punch Window
Defines the times between which employees must punch out for the day in order to qualify for the premium. To activate this feature, check the box and define before and after times.

Rounded Payroll Days Active
The check boxes in this section of the Shift Premium Setup window indicate the days of the week on which a shift premium is active. Days are defined as rounded days, meaning hours that cross midnight must be rounded into an active day in order to receive the premium. By default, all seven days of the week are active. Uncheck any days of the week for which the premium rules do not apply.

**EXAMPLE:** Employees earn a special premium for working weekends. The third shift on Friday is considered the first weekend shift, and the second shift on Sunday is considered the last weekend shift. The **End Of Day Time** is established as 23:00 on the **Overtime Policies** tab, so employees who punch in after 11:00 p.m. on Friday and before 11:00 p.m. on Sunday earn weekend hours. Six weekend shifts are set up accordingly, and Saturday and Sunday are specified as the only rounded days eligible for the premium.

Receive
The fields under the **Receive** heading determine what employees assigned to the pay class receive if all qualifiers in the shift premium are met. Keep in mind that none of these options can directly modify employees’ pay rates. Shift codes and pay types assigned to hours by premiums are usually used to activate rate override rules that modify employees’ pay rates.
Shift
Defines a shift code to be assigned to all hours that meet the qualifiers. Shift codes are usually used to activate rate overrides. Click the drop-down menu to select a shift code. All shift codes must be defined in the Code Tables section.

Premium Pay Regular
Defines a pay type to be assigned to all regular hours that meet the qualifiers. A premium pay type should be defined only if the default pay type for regular hours (usually Regular pay) should be changed when the qualifiers are met.

Premium Pay Overtime
Defines a pay type to be assigned to all overtime hours that meet the qualifiers. A premium pay type should be defined only if the default pay type for overtime hours (usually Overtime pay) should be changed when the qualifiers are met.

Premium Pay Double Overtime
Defines a pay type to be assigned to all double overtime hours that meet the qualifiers. A premium pay type should be defined only if the default pay type for double overtime hours (usually double overtime pay) should be changed when the qualifiers are met.

Payroll Date
Defines the payroll date to be assigned to all qualifying hours. The options in the drop-down menu are End of Day Time Decides, Shift Premium Start Date, and Shift Premium End Date.

Pay Date Change At End Of Shift
Indicates whether or not the payroll date changes at the end of the shift. This field can be used to define the last shift of the day or week while preserving an end-of-day time setting that allows employees to punch in early for the following shift.

Disable Auto Lunch
Indicates whether or not any automatic lunch deduction rules are disabled for employees who meet the qualifiers. This option applies only if an automatic lunch deduction rule has been defined on the Lunch/Break tab for the current pay class.

EXAMPLE: Three different shifts are staffed throughout the week, and employees often work on different shifts from day to day. The first shift runs from 7:00 a.m. to 3:30 p.m. The second shift runs from 3:00 p.m. to 11:30 p.m. The third shift runs from 11:00 p.m. to 7:30 a.m. Employees’ hours need to be assigned the appropriate shift codes so that rate override rules can adjust rates of pay accordingly. For each pay class in the company, the Shift Premiums tab is set up with three shift premium rules. The start and stop times of each shift are defined as the only qualifiers, and shift codes are the only codes defined under the Receive portion of the setup screen. Thus, the first shift is set up with a start time of 7:00, a stop time of 15:30, and shift code 01. The second shift is set up with a start time of 15:00, a stop time of 23:30, and shift code 02. The third shift is set up with a start time of 23:00, a stop time of 7:30, and shift code 03. Finally, the Majority Rules feature is set to Yes and the premiums are activated. Once shift codes are assigned to hours, rate override rules modify employees pay rates based on the shift codes.
**WARNING:** All 24 hours in a day must be accounted for when establishing shift premiums. In the example given above, the shift premiums would not work correctly if all three shifts were not defined on the *Shift Premiums* tab.

Shift premiums can only calculate premiums based on qualifiers within a single day of the week. If employees earn premiums based on qualifiers within an entire week, premiums need to be defined on the *Weekly Premiums* tab as described in the next section.

### 6.8 Restriction Tab

The *Restriction* tab contains restriction scheduling rules that are used to prevent employees from punching In For Day or Out For Day outside of scheduled start and stop times. Once restriction rules have been defined, the time clock polling process downloads the restrictions to time clocks so that employees can enter punches only within the approved intervals.

![Figure 38: Restriction Tab in Pay Class Setup](image)

**WARNING:** Restriction scheduling only works with WebEntry and with specific time clock models. In addition, this feature requires a significant amount of time clock memory. Enabling restriction scheduling reduces the memory available for storing employees’ punches and may require time clocks to be polled more frequently. In order to effectively use restriction scheduling, EmpowerTime users must always be certain that schedules are correctly set up for all employees assigned to pay classes with restriction rules. Contact Empower Technical Support for more information.

**REMEMBER:** Before setting up any restriction scheduling rules, be sure to enable restriction scheduling on the System Options 1 screen in the Company Setup section.

### Restrict Unscheduled Shifts

Defines whether or not employees can punch for unscheduled shifts. If this option is checked, employees can only punch for scheduled shifts. Do not enable this option unless all employees assigned to the pay class are scheduled for all assigned shifts.
Restrict Early IN Punches
Defines whether or not early In For Day punches are restricted. If this option is checked, a restriction period must be defined as described below.

Start Restriction
Defines the number of minutes before employees’ scheduled start times that restrictions begin. The restriction is only lifted once the Before Start Grace Period is reached as described below.

Stop Restriction
Defines the number of minutes before employees’ scheduled start times that restrictions are lifted, allowing employees to punch In For Day. This number is automatically defined based on the number defined in the Before Start Grace Period on the Schedule Rounding tab.

EXAMPLE: In the figure above a restriction rule has been set up on early In For Day punches. This rule starts restrictions 30 minutes before employees’ scheduled start times. A Before Start Grace Period of 15 has been defined on the Schedule Rounding tab, so restrictions are lifted fifteen minutes before scheduled start times. Employees assigned to this pay class who are scheduled to start work at 7:00 in the morning are not allowed to punch In For Day between 6:30 and 6:45 on scheduled days.

Restrict Late In Punches
Defines whether or not late In For Day punches are restricted. If this option is checked, a restriction period must be defined as described below.

Start Restriction
Defines the number of minutes after employees’ scheduled start times that restrictions are invoked. This number is automatically defined based on the number defined in the After Start Grace Period on the Schedule Rounding tab.

Stop Restriction
Defines the number of minutes after employees’ scheduled start times that restrictions are lifted.

Restrict Early Out Punches
Defines whether or not early Out For Day punches are restricted. If this option is checked, a restriction period must be defined as described below.

Start Restriction
Defines the number of minutes before employees’ scheduled stop times that restrictions are invoked. The restriction is only lifted once the Before Stop Grace Period is reached as described below.

Stop Restriction
Defines the number of minutes before employees’ scheduled stop times that restrictions are lifted, allowing employees to punch Out For Day. This number is automatically defined based on the number defined in the Before Stop Grace Period on the Schedule Rounding tab.
Restrict Late Out Punches
Defines whether or not late Out For Day punches are restricted. If this option is checked, a restriction period must be defined as described below.

Start Restriction
Defines the number of minutes after employees' scheduled stop times that restrictions are invoked. This number is automatically defined based on the number defined in the After Start Grace Period on the Schedule Rounding tab.

Stop Restriction
Defines the number of minutes after employees' scheduled stop times that restrictions are lifted.

Enforce Lunch Time
Defines whether or not early In From Lunch punches are restricted. If this option is checked, a restriction period must be defined in the Early Lunch IN Grace Minutes field.

6.9 Miscellaneous Tab

The Miscellaneous tab contains rules that are primarily used for unique circumstances. Explanations of the options on this tab are provided on the following pages.

Grant Pay
The Grant Pay feature is used to reimburse employees an amount of either hours or dollars for time spent at work. This feature is primarily used to give employees additional pay for meals. The Grant Pay Setup window, shown in the following figure, is used when setting up a grant pay policy. In order to set up a grant pay policy, hours or dollars Pay Amounts must be defined for up to three different Hours Worked increments. In addition, a Meal Pay Type must be selected so that EmpowerTime knows the pay type to use when adding pay records for employees earning grant pay.
Greater Than Hours
Defines up to three increments of hours that qualify employees for different pay amounts. Employees assigned to a pay class with a grant pay policy only earn the pay amount associated with the highest threshold of hours worked in a day.

Meal Pay Type
Defines the pay type that EmpowerTime uses when creating pay records to reimburse employees assigned to a grant pay policy.

TIP: If employees earn grant pay in dollars, then the pay type set in the Meal Pay Type field must be set up as dollars, not hours. For more information on pay types, see Chapter 5—Pay Types and Pay Type Groups.

Secondary Jobs Rate Override
The Secondary Jobs Rate Override feature enables or disables the automatic override of secondary job pay rates on specific week days. By default EmpowerTime always overrides secondary job pay rates when those rates are less than employees’ standard pay rates. This feature modifies that functionality can on specific days so that employees always earn secondary job pay rates regardless of their standard pay rates.

The Secondary Jobs Pay Override Setup window, shown in the figure below, defines the days on which EmpowerTime does not override secondary job pay rates when employees’ standard rates are greater. By default, all seven boxes in this window are checked in all new pay classes. Uncheck any days on which EmpowerTime should not override secondary job pay rates if employees’ standard pay rates are greater.
Pull Punch Detail From

The Pull Punch Detail From feature is used to change the default sequence by which labor details are defined for punches. Labor details are normally defined first by any overrides set up in employees’ schedules and then by employees’ default assignments in the Employee Setup section. The Pull Punch Detail From Setup window, shown in the figure below, can change that default functionality so that job, pay class, and organization codes are defined by another method.
NOTES

Figure 42: Pull Punch Detail From Setup

**REMINDER:** The number of fields in the Pull Punch Detail From Setup window depends on the number of organization levels set up in the current company.

To change the default punch detail sequence for any of the levels listed in the Pull Punch Detail From Setup window, simply select the desired entry from the appropriate drop-down menu. Explanations of the options in this window are provided below.

**Scheduled > Employee Main**
Indicates that labor detail codes are taken first from schedule overrides and then from employees’ default assignments. This is the default selection.

**Employee Main**
Indicates that labor detail codes are always taken from employees’ default assignments regardless of any detail codes last worked or defined in schedule overrides.

**Last Worked > Scheduled > Employee Main**
Indicates that labor detail codes are taken first from any codes last worked by employees, then from schedule overrides, and lastly from employees’ default assignments.

**Last Worked > Employee Main**
Indicates that labor detail codes should be taken first from any codes last worked by employees and then from employees’ default assignments.
No Change
Indicates that the posting process will not attempt to adjust any labor detail codes associated with transactions, regardless of their source. This option is used primarily for troubleshooting.

Labor Distribution

The Labor Distribution feature contains three advanced options designed for use in scenarios in which direct and indirect labor are tracked through EmpowerTime. The first option in this feature is used to round the first transfer punches of shifts back to employees’ In For Day punches. The two other options are used to define indirect labor codes into which paid lunch and break minutes should be moved. Explanations of the options in this window are provided below.

Figure 43: Labor Distribution Setup

**WARNING:** The features in the Labor Distribution Setup window are designed for use in situations in which EmpowerTime is integrated with an ERP software package. Do not enable these options unless directed to do so by Empower Technical Support.

Round Transfer To IND Time
Defines whether or not the first transfer punches entered in a shift are rounded back to employees’ In For Day punch times. Check this feature to enable it, then define a grace period in the field described below.

Round Transfer If Within
Defines a grace period in minutes after the start of each shift within which all transfer punches are rounded back to employees’ In For Day punch times. This feature is only available when the Round Transfer To IND Time option is enabled.
Move Paid Break Time To Indirect
Defines whether or not paid break minutes are automatically assigned indirect labor codes. Check this feature to enable it, then define the break times and indirect codes as explained below. Note that this feature works only if break rules are established on the Lunch/Break tab.

Break Times
Defines the paid break times to which EmpowerTime automatically assigns indirect labor codes. To define paid break times, enter the start time of each paid break into the Break Times field and click the Add (plus symbol) button to add the start time to the box below. Use the Delete (minus symbol) button to delete start times from the box.

Move Paid Lunch Time To Indirect
Defines whether or not paid lunch minutes are automatically assigned indirect labor codes. Check this feature to enable it, then define the break times and indirect codes as explained below.

WARNING: This feature only works if employees do not punch out and in for lunches and EmpowerTime is not set up to automatically deduct lunch minutes. The only lunch rule that must be defined on the Lunch/Break tab in order to use this feature is the Standard Lunch Minutes setting, which determines the number of lunch minutes that EmpowerTime will move to indirect codes each day, but any lunch minutes defined in employees’ schedule overrides always override the Standard Lunch Minutes.

Lunch Times
Defines the lunch times to which EmpowerTime automatically assigns indirect labor codes. To define paid lunch times, enter the start time of each paid lunch into the Lunch Times field and click the Add (plus symbol) button to add the start time to the box below. Use the Delete (minus symbol) button to delete start times from the box.

Indirect Setup
Provides access to the Pay Detail Setup window in which indirect labor codes are defined for paid lunch or break minutes. Indirect codes must be set up separately for paid lunches and breaks. This feature is explained in greater detail below.

If a pay class is configured to move paid lunch or break minutes to indirect labor codes, those codes must be defined. Click the appropriate Indirect Setup button to define codes for a paid lunches or breaks.
Using the Pay Detail Setup window, shown in the preceding figure, define the indirect labor codes to which the lunch or break minutes should be charged. Select the appropriate job and organization level codes from the drop-down menus. Any combination of codes may be used, but all codes must first be set up in the Code Tables section. Leave the \texttt{<DEFAULT>} option in any fields for which the labor detail codes should be taken from employees’ default assignments. Leave any fields blank that should not have any detail codes in them at all.

**EXAMPLE:** In the figure shown above, indirect labor is being assigned to a specific division, department and location. The job code level is left at the employee defaults.
6.10 Special Tab

The Special tab contains rules that are primarily used for unique circumstances. Explanations of the options on this tab are provided below.

![Figure 45: Special Tab in Pay Class Setup](image)

**WARNING:** Many of the features on this tab were developed to accommodate uncommon situations. Do not attempt to set up and use any features on this tab that you are not certain about. If in doubt, contact Empower Technical Support for assistance with setting up new pay class features.

**Allow > 24 Hour Shifts**
Defines whether or not employees are allowed to remain clocked in for more than 24 hours. This option is unchecked by default causing missing punch exceptions to be generated if employees are clocked in for over 24 hours.

**TIP:** This feature is used primarily by businesses such as ambulance services where employees often remain on the clock for more than a day.

**Unscheduled Time Is**
Defines whether or not all unscheduled hours are considered to be overtime. Choosing the No Change option will not have any effect on an employees worked time relative to their schedule. The Track option will flag any hours worked outside of the employee’s schedule as unscheduled time. These flags can be used in conjunction with Rate Override Classes (see Chapter 7—Rate Override Classes). Choosing the Track & Apply OT option flags unscheduled time for use with Rate Override Classes and also causes overtime to be applied first to unscheduled and then assigned in reverse chronological order.

**Auto Fill Punches**
Defines whether or not EmpowerTime automatically enters certain types of punches. If Scheduled Outs is selected, EmpowerTime automatically corrects missing Out For Day punches using employees’ scheduled stop times. This feature is disabled whenever
employees punch Out For Day and only works on days for which employees are scheduled. If All is selected, EmpowerTime automatically populates the timecards of all employees assigned to the current pay class with in and out punches for every scheduled day.

**WARNING:** Automatically populating employees’ timecards with punches based on their scheduled start and stop times may not be permitted under local, state, or union laws. This feature is typically enabled only for employees who work in the field and do not have access to data collection devices or programs. The automatically entered punches are then modified on an exception basis when necessary.

**Minimum Shift Length in Mins**
Defines a minimum number of minutes employees are guaranteed to work each shift. If a number is defined in this field, employees who work fewer minutes in a shift always have their daily totals rounded up to the minimum shift length.

**Lunch Zone Start Time**
Defines the time at which lunch break begins each day. This feature is used to ensure that automatic lunches are deducted from the correct segment of the day. The number of minutes deducted is based on the **Standard Lunch Minutes** field on the Lunch/Break tab.

**EXAMPLE:** A pay class is set up with a Lunch Zone Start Time of 12:00, and the **Standard Lunch Minutes** field is set to 30. In addition, the pay class is set up to deduct lunch minutes when employees do not punch out and in for lunches. Whenever employees assigned to the pay class are on the clock between noon and 12:30, EmpowerTime automatically deducts 30 minutes of time for lunch.

**Minor Pay**
**Minor Pay** is a feature used to adjust pay rates for employees who work more than a minimum number of hours in a pay period. The Minor Pay feature can adjust an employee’s pay rate for either all pay period hours or all hours greater than the minimum number of hours defined. By default, this option is disabled.

![Minor Pay](image)

To enable the **Minor Pay** feature, select one of the options in the **Minor Pay Class** dropdown menu and configure the other two fields as necessary. Descriptions of these fields are provided below.
**Minor Pay Class**
Enables or disables the Minor Pay feature. If No Minor Pay is selected, the feature is disabled. If New Pay Rate is selected, EmpowerTime automatically assigns the new pay rate to all pay period hours once an employee works the minimum number of hours defined in the Max Minor Hours field. If Addition To Pay Rate is selected, EmpowerTime increases the employee’s pay rate by the specified amount for all worked hours greater than the minimum number of hours.

**Max Minor Hours**
Defines the number of hours that must be worked before the selected Minor Pay rule takes effect and adjusts an employee’s pay rate.

**New/Additional Minor Pay Rate**
Defines the new rate of pay or the additional rate of pay to be applied to an employee’s hours once he or she has worked the minimum number of hours.

**EXAMPLE:** An employee is normally paid $5.00 per hour, but he is paid at $6.00 if he works more than 30 hours. The Max Minor Hours field in his pay class is set to 30, and the New/Additional Minor Pay Rate field is set to 6. If the Minor Pay field is set to New Pay Rate, the employee will earn $240 (40 hours at $6.00) for a 40-hour week. If Addition To Pay Rate is selected, the employee will earn $210 (30 hours at $5.00 plus 10 hours at $6.00) for a 40-hour week.

**Pay Standard**
The Pay To Standard Feature is used to pay employees a standard number of hours as long as a minimum number of hours are worked. When enabled, employees are paid the standard number of hours whenever their total weekly or pay period hours are greater than or equal to the minimum number of hours.

![Pay Standard](image)

To enable the Pay To Standard feature for a pay class, check the Pay To Standard Feature and configure the following three fields as necessary. Descriptions of these fields are provided below.

**Pay Frequency**
Defines the time frame on which pay to standard rules are based. The two options in the dropdown menu are Weekly and Pay Period.

**Hours > to Pay Standard**
Defines the minimum number of hours employees must work over the pay frequency in order to receive the number of Standard Pay hours.
EXAMPLE: Employees are only required to work 38 hours but are paid for 40 hours. However, employees who work less than 38 hours are only paid for the hours that were worked. To enforce this policy, the **Hours > To Pay Standard** field is set to 38, and the **Standard Pay** field is set at 40.

**Standard Pay**
Defines the number of hours for which employees are paid as long as they work the minimum number of hours defined in the **Hours > To Pay Standard** field.

**Blended Overtime**

**Blended Overtime** is a feature that determines employees' overtime pay rates based on different regular pay rates and the number of hours worked at each rate. If employees earn different regular pay rates as a result of secondary jobs, rate overrides, or a minor pay rule, blended overtime can calculate an average of the regular rates in order to give a true overtime rate.

![Blended Overtime](image)

**Blended Overtime**
Enables or disables the Blended Overtime feature. This feature is disabled by default.

**Pay Types in Total Dollars**
Defines all pay types that accumulate toward total dollars. Both regular and dollars (e.g., tips and bonuses) pay types are typically included in this field. Use the browse button to select all appropriate pay types.

**Pay Types in Actual Hours Worked**
Defines all pay types that accumulate toward total hours worked. Regular pay types are typically included in this field. Use the browse button to select all appropriate pay types.

**Pay Types to Receive Rate**
Defines the pay types to which blended rates are applied. Overtime pay types are typically included in this field. Use the browse button to select all appropriate pay types.
EXAMPLE: An employee works 15 hours at her standard pay rate of $8/hour, 25 hours at a premium pay rate of $10/hour, and five hours of overtime at a blended rate. The blended rate for the five hours of overtime is $9/hour, so the employee’s weekly hours are calculated as follows:

- 15 hours at $8/hour = $120
- 25 hours at $10/hour = $250
- 5 hours at $8/hour = $40
- 5 hours at $9/hour (blended pay rate) multiplied by .5 = $22.5

Total weekly dollars = $432.5

TIP: The Fair Labor Standards Act (FLSA) describes blended overtime pay rates (R) as total dollars earned (D) divided by total hours worked (H).

6.11 Weekly Premium Tab

The Weekly Premium tab contains rules for any premiums that are calculated based on cumulative weekly or daily qualifiers. An unlimited number of weekly premium rule groups and rules can be defined in each pay class.

EXAMPLE: The most common types of weekly premiums, called Baylor rules, are typically used in health care facilities like hospitals and retirement homes. Although the rules often differ, most Baylor rules specify that employees who work a certain number of weekdays plus a day on the weekend automatically earn several additional hours of pay. The examples provided in this chapter are modeled after Baylor rules, but weekly premiums are capable of handling many other weekly premium scenarios.

Weekly Premiums are organized into rule groups. Each pay class can contain one or more rule groups, listed in the weekly premium tab of the pay class detail window. Each rule group can contain one or more rules. Rule groups are processed in the order displayed. Groups can be reordered using the Up and Down buttons along the right side.
of the screen. To define weekly premium rule groups, click the Add button in the toolbar along the left side of the Weekly Premiums tab. To adjust premium rule groups that have already been established, click the Edit button or double-click the desired rule group. Explanations of the fields on this tab are provided below.

Activate
Defines whether or not the rules on the Weekly Premiums tab are activated. By default, the Weekly Premiums tab is deactivated in all new pay classes. Click the Yes radio button to activate weekly premium rules in a pay class.

Stop Processing After First
Defines whether or not employees assigned to the pay class can earn premiums from multiple rule groups. If checked, an employee can only earn premiums from the first rule group he or she qualifies for. If left unchecked, an employee can earn premiums from all rule groups he or she qualifies for. Note that order of the rule groups is critical if this option is checked.

The Weekly Premium window is the first window displayed when adding or editing rule groups. This window displays any weekly premium rules that have been built into the currently displayed rule group.

![Weekly Premium window](image)

Figure 50: Weekly Premium Rules List

Each weekly premium rule group should contain one or more rules. If the rule group contains multiple rules, the Stop Processing After First checkbox determines whether or not an employee can receive multiple premiums from the currently displayed rule group. If this feature is checked, the employee will receive only the first premium in the
group that he or she qualifies for. If left unchecked, the employee is eligible to receive as many premiums as he or she qualifies for in the rule group.

To add new rules to the rule group, click the Add button on the left side. Existing rules can be modified and deleted using the Edit and Delete buttons. Users can also edit rules by double-clicking on them. The order of the rules can be modified using the Up and Down buttons on the right side of the screen.

When adding new rules or editing existing rules within a rule group, the Weekly Premium Setup window is used. Weekly premium rules are comprised of two parts, qualifiers and premiums received. The qualifiers are the If part of the condition, and the premium received are the Then part of the condition. The qualifiers are setup on the Qualifiers tab and the premiums received are on the Receive tab. The Save and Cancel buttons along the top of the screen can be used to save or cancel changes made. The Close button returns the user to the weekly premium window for rule group setup. The Qualifiers and Receive tabs are described below.

![Weekly Premium Setup Qualifiers Tab](image)

**Figure 51: Weekly Premium Setup Qualifiers Tab**
Qualifiers Tab

The fields on the Qualifiers tab define the criteria that employees must meet in order to receive the premium for a weekly premium rule. At least one qualifier must be defined for every weekly premium rule. In addition, qualifying pay types must be defined so EmpowerTime knows when an employee’s hours count toward the qualifiers. The fields on the Qualifiers tab are described below.

Description
Provides a description of the weekly premium rule set. Enter a description up to 25 characters long that summarizes the purpose of the rules established in the weekly premium rule set.

Premium Type
From the drop-down menu, select whether this rule set should be Daily/Weekly or Spanning Weeks. To set a premium for a time period longer than a week, select Spanning Weeks and then configure the Pay Period, OT Calc Start, and Week(s) To Calc fields. Selecting Spanning Weeks will override any overtime guidelines set in the Overtime/Policies tab with the guidelines set here.

Minimum Days Worked
Defines a minimum number of days that must be worked within any given week in order to qualify for the corresponding premium. Check the box and define a number of days to use this qualifier.

**TIP:** In addition to defining a minimum number of days in a week that employees must work to qualify for a premium, you can also define some or all of the specific weekdays that must be worked. To define specific days as qualifiers, use the buttons in the toolbar in the lower left corner of the Qualifiers tab as described in the Daily Qualifiers section below. When defining specific days as qualifiers, be sure to include those days as part of the number defined in the Minimum Days Worked field.

Minimum Hours Worked Per Day
Defines a minimum number of hours that must be worked each day in order to qualify for the premium. Check the box and define a number of hours per day to use this qualifier. Note that this option is disabled unless the Minimum Days Worked option is checked.

Minimum Hours Worked
Defines a minimum number of hours that must be worked in a week in order to qualify for the premium. Check the box and define a number of weekly hours to use this qualifier.

Maximum Hours Worked
Defines a maximum number of hours that can be worked in a week in order to qualify for the premium. Check the box and define a number of weekly hours to use this qualifier.

Qualifying Pay Types
Defines the pay types that are considered as worked pay types when calculating qualifying days. Days of vacation, sick, personal leave, and holiday usually do not count...
as qualifying days. Select the pay types that signify worked days by clicking the browse button and selecting pay types from the pop-up window.

**Blend Piece Rate Weekly Per**

Defines the type of blending to employ for piece rate segments that occur at different points within a pay period. This option applies only if piece rate tracking is enabled. Contact Empower Technical Support for more information.

**Daily Qualifiers**

Daily qualifiers can be combined with any weekly qualifiers in weekly premium rule sets. Although daily qualifiers are not required, they add another level of detail to weekly premium rules by specifying that employees must work on certain weekdays in order to qualify. Daily qualifiers can also define a minimum number of hours and any combination of labor detail codes that must be worked.

![Daily Qualifiers Window](image)

To define a daily qualifier, click the **Add** button in the toolbar along the lower-left side of the Qualifiers tab. In the Daily Qualifiers window, shown in the preceding figure, select a weekday from the **Day of Week** drop-down menu. Next, select any additional criteria employees must meet to qualify on the selected day.

Daily qualifiers can include the number of hours that must be worked, the pay type that must be earned, and the shift, job, and organization level codes that must be worked. Any combination of daily qualifiers may be used, but **Day Of Week** is the only field that must be defined for a daily qualifier.

Additional daily qualifiers can be quickly created using the **Add** button in the toolbar along the top of the Daily Qualifiers window. Other buttons in this toolbar can be used to save and cancel changes, navigate between other daily qualifiers, and close the
NOTES

window. Once daily qualifiers have been established, they are displayed in a window along the bottom of the Qualifiers tab.

**EXAMPLE:** The figure above illustrates a daily qualifier that specifies employees must work eight hours on a Saturday in order to qualify for the premium. In addition, a combination of department and location codes has been defined, so employees’ hours on Saturdays must be associated with the correct labor detail codes in order to meet all qualifiers.

**Receive Tab**

The **Receive** tab defines the premium employees receive when all qualifiers are met. Weekly premiums can either give qualifying employees additional hours or modify the qualifying punches or hours with a different pay type and detail codes.

**NOTES**

To define the premium that qualifying employees receive, select the appropriate options from the drop-down menus and, if necessary, define a number of hours. The fields on the **Receive** tab are described below.

**EXAMPLE:** The preceding figure illustrates a weekly premium rule set up to pay qualifying employees four additional weekly hours of the REG pay type. All labor detail
fields have been left blank so that the pay records given to qualifying employees will be associated with the employees’ default assignments.

The **Receive Type** defines the type of benefit employees receive when all qualifiers in the weekly premium rule set are met. The options available in the drop-down menu are described below.

**Additional Hours Weekly**
Specifies that qualifying employees automatically receive a single pay record of the pay type, number of hours, and labor detail codes defined on the **Receive** tab.

**Additional Hours Daily**
Specifies that qualifying employees automatically receive a pay record for each day that meets the daily requirements. Each pay record includes the pay type, number of hours, and labor detail codes defined on the **Receive** tab. This option is commonly used for on-call pay situations.

**Modify All Punches**
Specifies that all punches on a qualifying employee’s timecard are modified with the pay type and labor detail codes defined on the **Receive** tab. This option can be used to assign labor detail codes that activate a rate override.

**Modify Qualifying Segment**
Specifies that all qualifying segments are modified with the pay type and labor detail codes defined on the **Receive** tab. This option can be used to assign labor detail codes that activate a rate override.

**Modify Qualifying Shift**
Specifies that all qualifying shifts are modified with the pay type and labor detail codes defined on the **Receive** tab. This option can be used to assign labor detail codes that activate a rate override.

**Modify Qualifying Hours**
Specifies that all qualifying hours are modified with the pay type and labor detail codes defined on the **Receive** tab. This option can be used to assign labor detail codes that activate a rate override.

**Modify Hours > Weekly Minimum**
Specifies that all qualifying hours greater than the minimum weekly hours (defined on the **Qualifiers** tab) are modified with the pay type and labor detail codes defined on the **Receive** tab. This option can be used to assign labor detail codes that activate a rate override. This option is often used to accommodate triple overtime policies.

**NOTE:** The **Modify Hours > Weekly Minimum** option will also activate the **Reallocate Hours** feature, which is described in more detail below.

**Modify Hours > Pay Period Minimum**
Specifies that all qualifying hours greater than the minimum pay period hours (defined on the **Qualifiers** tab) are modified with the pay type and/or labor detail codes defined on the **Receive** tab. This option can be used to assign labor detail codes that activate a rate override. This option is often used to define overtime policies not handled by the
standard overtime feature in EmpowerTime. For example, this option can be used to calculate overtime based on a 28-day pay period.

**NOTE:** This option will appear on the Receive Type drop-down menu of the Receive tab only when Pay Period has been selected as the Premium Type on the Qualifiers tab.

**Modify Hours Daily > Daily Minimum**
Specifies that all hours greater than the minimum weekly hours (defined on the Qualifiers tab) on qualifying days are modified with the pay type and labor detail codes defined on the Receive tab. This option can be used to assign labor detail codes that activate a rate override. This option is similar to daily overtime.

**NOTE:** The Modify Hours Daily > Daily Minimum option will also activate the Reallocate Hours feature, which is described in more detail below.

**Pay To Standard Weekly**
Specifies that qualifying employees automatically receive the standard weekly hours (defined in the Hours field on the Receive tab) when the minimum weekly hours (defined on the Qualifiers tab) are worked. This option is similar to the Pay To Standard feature available on the Special tab except that additional qualifiers can be defined.

**Pay To Standard Daily**
Specifies that qualifying employees automatically receive the standard daily hours (defined in the Hours field on the Receive tab) when the minimum weekly hours (defined on the Qualifiers tab) are worked. This option is similar to the Pay To Standard feature, except that additional qualifiers can be defined.

**NOTE:** The Pay To Standard Daily option will activate the Reallocate Segment feature, which is described in more detail below.

**Pay To Standard Segment**
Specifies that qualifying employees automatically receive the standard segment hours (defined in the Hours field on the Receive tab) when the minimum hours (defined on the Qualifiers tab) have been worked. This option is similar to the Pay To Standard feature available on the Special tab, except that additional qualifiers can be defined.

**NOTE:** The Pay To Standard Segment option will activate the Reallocate Segment feature, which is described in more detail below.

**Blended Piece Rate**
Specifies that piece rate segments that occurred at different points within a pay period are blended regardless of an employee’s home pay rate. This option applies only if piece rate tracking is enabled. In addition, the Blend Piece Rate Weekly Per option on the Qualifiers tab must be configured in order to use this option.

**Blended Piece Rate > Home Rate**
Specifies that piece rate segments that occurred at different points within a pay period are blended only if the resulting piece rate is greater than an employee’s home pay rate. This option applies only if piece rate tracking is enabled. In addition, the Blend Piece Rate Weekly Per option on the Qualifiers tab must be configured in order to use this option.
Hours
Defines the number of additional hours employees earn if all qualifiers in the weekly premium rule set are met. This option is available only to premiums set up to pay out additional hours as described above. Additional hours are paid out in the form of pay records.

Reallocate Hours
If the Modify Hours > Weekly Minimum or Modify Hours Daily > Daily Minimum options are selected in the Receive Type field above, you can use the Reallocate Hours feature to determine how the extra hours get applied. The Home/First Work and Home/Last Work options will apply the extra hours first to the employee's default labor code and then to either the first or last labor code worked that day or week if there are not enough hours available in the default labor code. First Work and Last Work will apply the hours to either the first or last labor code worked that day or week. Specified will apply the extra hours to the labor codes defined in the bottom section of the screen.

To select which labor codes will be affected by the weekly premium, check the appropriate organization levels in the list to the right of the Reallocate Hours field.

Pay Type
Defines the pay types to be applied to the pay records or punches of qualifying employees, depending on the option selected in the Receive Type field. To select the pay types, click the browse button to the right of the field. Select the qualifying pay types using the arrow buttons in the middle of the screen. Be sure to save your changes.

Job, Shift, Organization Levels
Defines the job, shift, and organization level codes to be applied to the pay records or punches of qualifying employees, depending on the option selected in the Receive Type field. If any of these options are left blank, qualifying employees’ default assignments are used. The number of organization level fields available in this window depends on the number of levels set up in the current company. All the codes in these drop-down menus are defined in the Code Tables section.

REMINDER: The Stop Processing After First options on the Weekly Premium tab of the Pay Class Detail screen or on the Weekly Premium Detail screen can be used to prevent qualifying employees from earning multiple weekly premiums in a single week.

Reallocate Segment
The Reallocate Segment feature is activated when either Pay To Standard Daily or Pay To Standard Segment is selected in the Receive Type menu above. Hours over the segment minimum can be reallocated to the employee’s default labor code, the labor code used either at the beginning or the end of the segment, or to a labor code specified in the bottom section of this window.
6.12 Review Indicators Tab

The Review Indicators tab determines the review and approval options applied to employees in the pay class. If enabled, employees assigned to the current pay class are listed in the Mass Approvals utility, and employees are subject to the review process as defined in Rules Setup → Company Setup → System Options. For more information on approvals, see Chapter 14—Timecards, Pay Records, and Approvals. Different review indicators can be set for daily and weekly review. Some tracked items, such as Missing Punch, are set to a Red indicator by default. Items set to Red will prevent timecards from being approved, while items set to Yellow will just display as a warning on the approvals screen.

Figure 54: Review Indicators Tab in Pay Class Setup

1. To enable approvals on a daily or weekly basis, check the Validate On Approvals box.

2. Next, define what items should be tracked for approvals. A few items are listed by default, and some of them cannot be changed or deleted. To add an item for daily or weekly approval, click the Add button in the appropriate section.

3. A list of all available items will display in a window like the one shown in the following figure. To quickly search for an item, enter the first word or first few letters in the Value field under Search Options. The first matching item will automatically be indicated with the black arrow in the left column. To show other matching items, click the Find Next button.
4. To add an item to your list of review indicators, either double-click the item or select it and click **Save**. The item will now show up in the list of review indicators. To change whether the item is Red or Yellow, select the option from the drop-down menu in the **Indicator** column.

5. Some options require a number of hours to be set in order to work properly. For instance, if you would like to set an indicator that will display if an employee works more than nine hours per day, you will need to configure that item. To display the **Hours** column, click the **Field Chooser** button in the upper left corner of the grid. From the Grid Setup window, check the box next to the **Hours** field and click **Save**.
Figure 57: Grid Setup

6. In the appropriate field in the **Hours** column, enter the number of hours to trigger the review indicator. For the example in the previous step, we’ve entered 9 into the **Hours** field next to **Hours Per Day >**.

![Figure 58: Review Indicators List With Hours Column](image)

7. Once the review indicators are set, be sure to click the **Save** button along the top before navigating to another tab. The indicators will now show up in the **Daily Status** section of the Home screen and the Employee Approvals section.
CHAPTER 7 — RATE OVERRIDE CLASSES

7.1 Overview

Rate override classes are groups of rules in EmpowerTime™ that assign different pay rates, pay types, pay factors, dollar amounts, and labor detail codes to employees’ hours when specific qualifiers are met. Rate overrides are commonly used to modify employees’ pay for working on certain shifts, jobs, or a combination of various qualifiers.

EXAMPLE: Several examples of common rate override situations are provided below.

- Employees who work on the second shift receive an extra $1.00 per hour.
- Employees who work in the shipping department earn a 10% premium. Employees who work on Saturdays receive a flat $10.00 bonus.
- Employees who work in the shipping department earn hours under a different pay type.
- Employees who work in the shipping department are automatically transferred into the warehouse location code.

To access the Rate Override Classes section, click Rate Override Classes in the Rules Setup drop-down menu.

Figure 59: Rate Override Classes
7.2 Creating Rate Override Classes

An unlimited number of rate override classes may be defined, and within each class an unlimited number of rate override rules can be established. For example, rate override class 01 may be set up with dozens of rate override rules that apply to employees who are paid weekly, while rate override class 02 may contain rate override rules that apply only to biweekly employees. Employees are only eligible to earn the premiums defined in the rules of the rate override class they are assigned to in the Employee section.

To create a new rate override class, click the Add button at the bottom of the window and enter a rate override class code and description. Rate override codes may be up to 10 characters long and may include letters, numbers, symbols, and spaces. Rate override classes can be edited by double-clicking the rate override class or by using the Edit key at the bottom of the screen. Adding a new rate override class or editing an existing one brings up the Rate Override Class Detail window as shown in the following figure.

![Rate Override Class Detail](image)

The Rate Override Class Detail window is used to add rules to rate override classes and establish the order of the rules. Rate override classes will process each rule in order from top to bottom until the employee qualifies for a premium. The employee receives that premium, and the rate override class stops processing unless the premium includes a Rerun Through Overrides. Rules can reordered using the Up and Down buttons along the left side of the screen. Rules can be added using the Add button, and existing rules can be edited using the Edit key or by double-clicking the rule. Adding or editing rules brings up the Rules window.
The rules window contains two sections, **Qualifiers** and **Receive**. **Qualifiers** represent the *If* portion of the condition, and **Receive** represents the *Then* section. For example, a rate override class could create the following condition, "If an employee works in shift code 03, then add 75 cents to their pay rate."

![Rate Override Class Detail Rules Window](image)

**Qualifiers**

The first step in configuring a rate override rule is to define the qualifiers that must be met in order for the override to take effect. The criteria that may be used to activate rate overrides include shift codes, pay types, job codes, and organization level codes. Rate overrides can include as few or as many qualifiers as necessary.

**EXAMPLE:** A rate override rule is set up with two qualifiers: the **Shift** box is checked and shift code 02 is selected, and the **Job** box is checked and job code 07 is selected. Therefore, any employees assigned to this rate override class who work on job code 07 during the second shift receive the rate override premium defined in this rule.

Any qualifiers left unchecked have no effect on the rate override rule. However, be sure to avoid checking any unnecessary boxes. All boxes that are checked should must a corresponding code specified. In other words, if the **Shift** box is checked but no shift code is defined, the rate override will not work correctly.

**TIP:** Rate overrides are commonly used in conjunction with shift premium rules, which are defined in the Pay Classes section. Shift premium rules assign shift codes to employees' hours, and rate override rules calculate premiums based on the shift codes.

Once all necessary qualifiers have been defined, select the days of the week on which the rule is active. Keep in mind that rate overrides are calculated based on rounded days, so override rules for shifts that cross midnight should be carefully tested.
Finally, select the override to be received if all criteria are met. There are five types of overrides: rate, factor, dollar, pay type, and level overrides. These five override types are described below.

**TIP:** The **Unscheduled Day** and **Unscheduled Time** checkboxes are used to as a qualifier for time worked outside of an employee’s schedule. If an employee works on a day for which they have no scheduled start and stop times, that time is considered to be an unscheduled day. Any time worked outside of an employee’s schedule counts as unscheduled time. You must configure the employee’s pay class rules to flag unscheduled time before these options can be used. Please refer to Chapter 6—Pay Classes for more details.

**Receive Options, Rate Overrides**

Rate overrides adjust employees' standard pay rates when all qualifiers in the rule are met.

To establish a rate override, check the Rate box and define a new pay rate. Next, select one of the options from the drop-down menu to the right. The options in this menu are described below.

**Add To**

Increases an employee’s standard pay rate for the qualifying hours by the dollar amount defined in the Rate field.

**EXAMPLE:** An additional $1.00 per hour is added to an employee’s standard pay rate for all qualifying hours.

**Override**

Changes an employee’s standard pay rate for the qualifying hours to the dollar amount defined in the Rate field, regardless of which pay rate is higher.

**EXAMPLE:** A pay rate of $10.00 per hour is applied to all qualifying hours, regardless of an employee’s standard pay rate.

**Override If > Home Rate**

Changes an employee’s standard pay rate for the qualifying hours to the dollar amount defined in the Rate field, but only if it is greater than the employee’s standard pay rate.

**EXAMPLE:** A pay rate of $10.00 per hour is applied to all qualifying hours, unless an employee’s standard pay rate is greater.

**Piece Rate**

Changes an employee’s standard pay rate based on the configuration of piece rates policies. Contact Empower Technical Support for more information.

**Piece Rate If > Base Rate**

Changes an employee’s standard pay rate based on the configuration of piece rates policies, but only if the piece rate is greater than the employee’s base pay rate. Contact Empower Technical Support for more information.

**Piece Rate If > Home Rate**
Changes an employee’s standard pay rate based on the configuration of piece rates policies, but only if the piece rate is greater than the employee’s home pay rate. Contact Empower Technical Support for more information.

**Add To W/ Emp Misc 3**
Changes an employee’s standard pay rate for the qualifying hours by adding the numeric value in the **Miscellaneous 3** field in the Employee Setup section. When this option is selected a rate does not need to be defined in the Rate Override Classes edit window, as the calculation involves only an employee’s standard pay rate and the value defined in the **Miscellaneous 3** field.

**Rate + (Rate * Emp Misc 3)**
Changes an employee’s standard pay rate for the qualifying hours by adding the value resulting from the following calculation: the employee’s standard rate multiplied by the numeric value in the **Miscellaneous 3** field in the Employee Setup section. In other words, this rate override is used to add a percentage of an employee’s standard rate to his or her standard rate for qualifying hours. When this option is selected a rate does not need to be defined in the Rate Override Classes edit window.

**Total Hours/ Emp Misc 3**
Changes an employee’s standard pay rate by dividing the qualifying hours by the numeric value in the **Miscellaneous 3** field in the Employee Setup section. This rule is designed for exempt overtime pay situations in which an employee’s overtime pay rate decreases the longer that he or she works overtime. In other words, this rate override is intended to discourage employees from working overtime hours. When this option is selected a rate does not need to be defined in the Rate Override Classes edit window.

**Rate * Hours -> Given $**
This option adds a flat dollar amount to an existing dollars type pay record. This feature would be used to award premium pay as a separate bonus record instead of increasing an employee’s pay rate.

The most commonly used overrides are **Add To**, **Override**, and **Override If > Home Rate**. The piece rate options in this menu should not be enabled without assistance from Empower Technical Support.

**Receive Options, Factor Overrides**
Factor overrides adjust the pay factor that would normally be multiplied by employees’ pay rates to calculate dollar totals for specific situations. Factor overrides do not change the type of pay employees earn (e.g., regular or overtime pay) but rather adjust the default factor applied to qualifying hours. To establish a factor override, check the **Factor** box and define a new pay factor. Next, select one of the three options available in the **Factor** drop-down menu. The options in this menu are described below.

**Add To**
Increases the default pay factor by the specified amount for all qualifying hours.

**EXAMPLE:** Employees earn a 10% premium for specific work situations, so a factor of .10 is added to the default pay factor for all qualifying hours.
Override
Changes the default pay factor to the specified figure for all qualifying hours.

**EXAMPLE:** Employees are paid time and a half for specific work situations, so a factor of 1.5 overrides to the default pay factor for all qualifying hours.

Multiply And Update Rate
Multiplies an employee’s pay rate by the specified factor for all qualifying hours. Many payroll systems cannot accept pay factors in the payroll export file but do accept pay rates, so this rule is ideal for these situations.

**EXAMPLE:** Employees earn a 25% premium on all qualifying hours, but the payroll system cannot accept pay factors in the payroll export file. To circumvent this limitation, a factor of 1.25 is multiplied by employees’ pay rates for all qualifying hours. An employee who normally earns $10 per hour works eight hours that qualify for the premium, and after the rate override calculations are applied the employee’s pay rate increases to $12.50 per hour for the qualifying hours.

**REMINDER:** Each pay type set up in EmpowerTime is assigned a default pay factor. Factor overrides modify the default pay factors associated with pay types.

Receive Options, Dollar Overrides
Dollar overrides adjust the amount of money qualifying employees would normally earn for working in specific situations. To establish a dollar override, check the box next to **$ Amount** and define a figure in dollars. Next, select one of the two options from the drop-down menu.

Add To
Adds a flat dollar amount to a qualifying employee’s standard pay.

**EXAMPLE:** Employees earn a $10 bonus for specific work situations, so a dollar amount of $10 is added to the dollars normally earned for the hours.

Override
Overrides a qualifying employee’s pay with a flat dollar amount.

**EXAMPLE:** Employees earn a flat amount of $100.00 for specific work situations, regardless of the dollar amount that would normally be earned for the hours.

Receive Options, Pay Type Overrides
Pay type overrides modify the pay types that would normally be associated with employees’ hours in specific situations. Pay type overrides can be used to automatically invoke overtime, double overtime, or any other pay types when qualifiers are met. To establish a pay type override, check the box next to **Pay Type** and select a new pay type from the first drop-down menu. Every pay type set up in the current company is available in the menu. Next, select one of the four options available in the second drop-down menu. The options in this menu are described below.
Add To + Straight Copy
Adds the selected pay type to the default pay type earned by an employee for all qualifying hours.

**EXAMPLE:** For payroll purposes, overtime is paid out as one hour of regular pay at a factor of 1.0, plus one hour of overtime at a factor of 0.5 (the factors of these two pay types are defined in the Pay Types section). Every time that a qualifying employee earns overtime hours, the rate override automatically adds an equal number of regular hours for all qualifying hours.

Add To + Rerun Through Overrides
Adds the selected pay type to the default pay type earned by an employee for all qualifying hours, and then searches through all other rules set up in the current rate override class for additional overrides that may apply.

**EXAMPLE:** Every time that a qualifying employee earns overtime hours, a rate override automatically adds an equal number of regular hours for all qualifying hours (as described in the previous example). However, employees can also earn a $10 bonus in certain overtime situations. Whenever the rate override adds regular hours to overtime hours, it also scans the other rate override rules to determine whether or not the qualifying employee is eligible for any other premiums.

Override Pay
Replaces the default pay type with the specified pay type for all qualifying hours.

**EXAMPLE:** Qualifying employees earn a special premium pay type instead of the default pay type for specific work situations.

Override Pay + Rerun Through Overrides
Replaces the default pay type with the specified pay type for all qualifying hours, and then searches through all other rules set up in the current rate override class for additional overrides that may apply.

**EXAMPLE:** Qualifying employees earn a special premium pay type instead of the default pay type for specific work situations (as described in the previous example). However, employees can also earn a $10 bonus in certain premium situations. Whenever the rate override replaces the default pay type with the premium pay type, it also scans the other rate override rules to determine whether or not the qualifying employee is eligible for any other premiums.

Receive Options, Level Overrides
Level overrides modify the labor detail codes that would normally be associated with employees' hours in specific situations. For example, a level override might be used to automatically transfer an employee into a specific department code when the qualifiers are met. Level overrides can be used independently or in conjunction with rate, factor, dollar, and pay type override rules.
To establish a level override, check one of the Level boxes and select job code, shift, or an organization level from the first drop-down menu. Next, select one of the two options available in the second drop-down menu. The options in this menu are described below.

**Value**
Replaces the labor detail code associated with the selected level with a value from the Code Tables section for all qualifying hours. When this option is selected, the drop-down menu to the immediate right contains all codes that have been entered into the Code Tables section for the selected level.

**Emp Field**
Replaces the labor detail code associated with the selected level with a value from a field in the employee database. When this option is selected, a browse button is enabled the field to the immediate right. Click the browse button to select the appropriate field.

**EXAMPLE:** Employees’ license numbers must be associated with their hours for specific work situations. Employees’ license numbers are recorded in the Miscellaneous 1 field in the Employee Setup section. Whenever the qualifiers are met, each person’s license number is automatically added to the selected labor detail level for all qualifying hours.

Once a level and an override rule have been selected, define how the override rule should function. The two options in the last Level drop-down menu are described below.

**Override**
Replaces the default detail code associated with the selected level with the specified code or value for all qualifying hours.

**Override + Rerun Through Overrides**
Replaces the default detail code associated with the selected level with the specified code or value for all qualifying hours, and then searches through all other rules set up in the current rate override class for additional overrides that may apply.

**EXAMPLE:** Employees are automatically transferred into the headquarters location code for specific work situations. However, employees can also earn a $10 bonus in certain situations when working at headquarters. Whenever the rate override automatically transfers an employee into the headquarters location, it also scans the other rate override rules to determine whether or not the qualifying employee is eligible for any other premiums.

**Other Configuration Options**

**Apply Rate Override Before Overtime Calculation**
Defines whether the rules in the current rate override class are applied before or after overtime calculations when the posting process is executed. If set to **Yes**, EmpowerTime applies all applicable rate override rules to an employee’s hours before applying the overtime rules defined in his or her pay class.
CHAPTER 8—ERROR CLASSES

8.1 Overview

Error classes are groups of rules that define which exceptions EmpowerTime™ tracks for employees. Many exceptions are available in EmpowerTime, and exceptions can be tracked differently for different groups of employees. Once exceptions have been generated they may be viewed either on the screen or by running a report such as the Exceptions Report, Daily Activity Report, Hours Worked Simplified Report, or Roll Call Report. Exceptions from previous pay periods are archived in the Historian.

The Error Classes section, shown in the following figure, can be found by selecting Error Classes from the Rules Setup drop-down menu. Many different exceptions are available in the Error Classes section, and most of these exceptions can be configured. Configuration options include disabling exceptions, defining grace periods within which exceptions are not tracked, renaming exceptions, and linking exceptions to attendance tracking. New exceptions cannot be created and added to the list.

Figure 62: Error Classes

Multiple error classes can be established for any company in EmpowerTime. Multiple error classes are necessary if exceptions are tracked differently for different groups of employees. For example, hourly employees might be subject to a stricter exception tracking policy than salaried employees.
8.2 Creating and Configuring Error Classes

An error class represented by the code Standard is automatically created in each company in EmpowerTime. This error class can be modified or deleted, and additional error classes can be created if different exception tracking policies are applied to different groups of employees.

To add a new error class, click on the Add button at the bottom of the screen. Existing error classes can be modified by selecting the error class then clicking the Edit button, or by double-clicking the error class. Adding or editing error classes brings up the Error Class Detail window. Enter an Error Class Code and Description. Error class codes may be up to 12 characters long and may include letters, numbers, and symbols. When a new error class is created, all available exceptions are activated with no grace periods.

Modifying exceptions in an error class is easy. Highlight an exception to configure and click the Edit button or double-click the desired exception to access the Error Classes edit window as shown in the following figure. Use the buttons in the toolbar at the top of the window to navigate between different error classes and to save or cancel changes. Descriptions of the fields in this window are provided below.
NOTES

Figure 64: Error Class Edit

Error Code
Displays the code of the error class currently open. Error class codes cannot be changed once they have been defined.

Description
Displays the default description of the current exception. All descriptions can be changed, but keep in mind that exceptions should not be renamed with confusing descriptions.

Track Exception
Specifies whether or not EmpowerTime identifies instances of the currently displayed exception for employees assigned to the current error class. All errors are enabled by default, and most errors can be disabled. Exceptions that cannot be disabled include missing punch, excessive hours worked, missing detail record, pay class, unable to calculate total hours, no automatic lunch taken, and unable to remove break time.

> Minutes
Displays the number of grace period minutes for the currently displayed exception. By default, all exception grace periods are set to zero. When a grace period is defined for an exception, instances of that exception that occur within the grace period are suppressed. This option is disabled for some exceptions.

EXAMPLE: Management does not want EmpowerTime to generate Tardy exceptions unless employees are more than five minutes late. All employees are assigned to the same error class, so the tardy error in this error class is changed to reflect a > Minutes of five (5). Once the change is made, tardy exceptions are suppressed when an employee is one to five minutes late for work.
Track In Attendance
Defines whether or not the currently displayed exception is tracked in employees’ attendance records. Checking this field links absence reason codes (defined in the Code Tables section) to exceptions that represent situations where an employee “took time” from the company. When an exception is generated, the absence reason linked to the exception is recorded in the corresponding employee’s attendance history. The exceptions for which this option can be enabled are tardy, early out, lunch too long, break too long, absent, very early in, late, very late, very early out, and very late out.

Reason
Displays the absence reason code that is linked to the currently displayed exception for attendance tracking purposes. This option is only available for the qualifying exceptions listed above.

TIP: Attendance tracking is primarily used to identify employees who commonly show up late, leave early, take long lunches, and so on. If increased tracking of attendance policies is necessary, the Points Manager module can be added to the EmpowerTime solution. The Points Manager module tracks employees’ attendance infractions, assigns values to those infractions, and determines penalties. For more information on the Points Manager module, contact Empower Technical Support.

8.3 Exception Definitions
All of the exceptions available in EmpowerTime are listed and described below.

Early In
Indicates that an employee arrived prior to his or her scheduled start time. Employees must be scheduled in order for this exception to be generated.

Tardy
Indicates that an employee arrived after his or her scheduled start time. Employees must be scheduled in order for this exception to be generated.

Early Out
Indicates that an employee left work prior to his or her scheduled stop time. Employees must be scheduled in order for this exception to be generated.

Late Out
Indicates that an employee left work after his or her scheduled stop time. Employees must be scheduled in order for this exception to be generated.

Non-Scheduled Day
Indicates that an employee punched on a day for which he or she was not scheduled to work.

Missing Punch
Indicates that an employee is missing a punch in his or her timecard.

Lunch Too Long
Indicates than an employee took a lunch break that was longer than the standard number of

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Indicates that an employee left work prior to his or her scheduled stop time. Employees must be scheduled in order for this exception to be generated.

Late Out
Indicates that an employee left work after his or her scheduled stop time. Employees must be scheduled in order for this exception to be generated.

Non-Scheduled Day
Indicates that an employee punched on a day for which he or she was not scheduled to work.

Missing Punch
Indicates that an employee is missing a punch in his or her timecard.

Lunch Too Long
Indicates than an employee took a lunch break that was longer than the standard number of
lunch minutes defined for the day. Standard lunch minutes are determined by an employee’s schedule overrides or pay class rules (if no schedule overrides are defined for the day).

Break Too Long
Indicates that an employee took a break that was longer than the standard number of break minutes defined in his or her pay class rules.

Lunch Too Short
Indicates than an employee took a lunch break that was shorter than the standard number of lunch minutes defined for the day. Standard lunch minutes are determined by an employee’s schedule overrides or pay class rules (if no schedule overrides are defined for the day).

Absent
Indicates than an employee failed to punch on a day for which he or she was scheduled to work. Note that a pay record entered for a scheduled day may suppress this exception, depending on the Track Absences With Pay Records setting defined in the Company Setup section.

TIP: If the Track Absences With Pay Records option in the Company Setup section is set to Yes, Absent exceptions are suppressed whenever pay records are entered for scheduled days on which employees did not punch.

Not Enough Breaks
Indicates that the total number of breaks taken by an employee in a day was fewer than the number of breaks allowed as defined in his or her pay class.

Excessive Breaks
Indicates that the total number of breaks taken by an employee in a day was greater than the number of breaks allowed as defined in his or her pay class.

Total Breaks Too Long
Indicates that the total amount of break time taken by an employee in a day was greater than the number of break minutes allowed as defined in his or her pay class.

No Lunch Taken
Indicates that an employee did not punch for lunch on a workday, whether or not lunch minutes were automatically deducted.

Too Many Lunches
Indicates that an employee took more than one lunch break in a workday.

Excessive Hours Worked
Indicates than an employee’s timecard contains a segment of more than 24 worked hours.

Missing Detail Record
Indicates than an employee’s hours are missing the detail records. This exception indicates that there is a problem with the punch detail database. Contact Empower Technical Support.
Invalid Pay Class
Indicates that an employee's hours are associated with an invalid pay class code and total hours for the day cannot be calculated.

Corr. Hours In Pay Recs
Indicates that an employee has hours for a workday from both punches and pay records.

Unable To Calc Total Hrs
Indicates that the total number of hours calculated for a workday is less than zero. This exception generally indicates that EmpowerTime rules are not configured correctly. Contact Empower Technical Support if this exception is generated.

No Automatic Lunch Taken
Indicates that a lunch break was not automatically deducted from an employee's hours on a workday because the employee punched In For Day-again (IDA) and the pay class rules are configured to interpret IDA punches as lunch punches.

Early In From Lunch
Indicates that an employee punched back in from a lunch break earlier than scheduled.

Tardy In From Lunch
Indicates that an employee punched back in from a lunch break later than scheduled.

Early Out For Lunch
Indicates that an employee punched out for a lunch break earlier than scheduled.

Late Out For Lunch
Indicates that an employee punched out for a lunch break later than scheduled.

Invalid Detail Record
Indicates that an employee's hours are associated with an invalid labor detail code on a workday. This exception cannot be generated unless the Reject Invalid Detail Records option in the Company Setup section is set to No. Otherwise, punches associated with invalid detail records are pushed into the Rejected Punch Maintenance utility.

Missing Concurrent Start/End
Indicates that a CON or ECON punch is missing from an employee's timecard.

Invalid Xfer During Concur.
Indicates that an employee entered a transfer punch while working on concurrent jobs. Additional transfer punches cannot be recorded between CON and ECON punches.

Very Early In
Indicates that an employee arrived prior to his or her scheduled start time. The grace period for this exception should be set higher than the Early In exception. Employees must be scheduled in order for this exception to be generated.

Late
Indicates that an employee arrived after the scheduled start time. The grace period for this exception should be set higher than the Tardy exception. Employees must be scheduled in order for this exception to be generated.
Very Late
Indicates that an employee arrived after his or her scheduled start time. The number of grace period minutes for this exception should be set higher than the Tardy and Late exceptions. Employees must be scheduled in order for this exception to be generated.

Very Early Out
Indicates that an employee left work prior to his or her scheduled stop time. The number of grace period minutes for this exception should be set higher than the Early Out exception. Employees must be scheduled in order for this exception to be generated.
CHAPTER 9—HOLIDAY CLASSES

9.1 Overview

Holiday classes define the company-recognized holidays on which employees can receive automatic holiday pay. Once holiday classes have been created and assigned to employees, qualifying employees automatically receive pay records for holidays based on pre-defined criteria. Multiple holiday classes can be established in EmpowerTime if different groups of employees are subject to different holiday rules.

**EXAMPLE:** Full-time employees receive eight hours of pay on company-recognized holidays, while part-time employees only receive four hours of holiday pay on the same dates. To accommodate this policy, two holiday classes are created and assigned to the appropriate employees.

To access the Holiday Classes section, select **Holiday Classes** in the **Rules Setup** dropdown menu.

**REMINDER:** Holiday hours are paid holiday to qualifying employees as pay records. Holiday hours do not show up in employees’ records until all qualifiers have been met, which may include working the day after a holiday. The date of a holiday must land in the current (oldest active) pay period for hours to be automatically paid out, so failing to close an old pay period can prevent the automatic payment of holiday hours in a new pay period until the old pay period is closed.
9.2 Creating and Configuring Holiday Classes

To create a new holiday class, click the Add button at the bottom of the screen. Holiday classes can be edited using the Edit button or by double-clicking the holiday class to be edited. Adding or editing holiday classes will bring up the Holiday Class Detail window as pictured below. Enter a Code and Description for the Holiday Class. Holiday class codes can be up to three characters long and may include letters, numbers, symbols, and spaces.

If multiple holiday classes are necessary, it may be easier to create a holiday class and copy it rather than creating multiple holiday classes from scratch. To copy a holiday class, select Duplicate Holiday Class from the Holiday Classes drop-down menu at the top of the screen. EmpowerTime will create a duplicate of the highlighted holiday class in the Holiday Class Detail window.

Once a new holiday class has been created it must be configured with all appropriate rules, holiday dates, and holiday hours. Descriptions of the fields in the Holiday Classes section are provided below.
**Worked Pay**
Defines the default pay type employees receive for hours worked on a holiday. A regular or overtime pay type is typically selected in this field. Select the appropriate pay type from the drop-down menu.

**Non Worked Pay**
Defines the pay type used for pay records when qualifying employees are automatically paid for holidays. The *Receive Holiday Hours* field (described below) determines when hours of the pay type selected in this field are automatically paid to employees. A holiday pay type is typically selected in this field. Select the appropriate pay type from the drop-down menu.

**Pay For 24 Hours**
Defines how hours are handled for employees who punch in the day before a holiday and work through the end of day into the holiday date. If checked, employees who punch in before the start of the holiday can receive the worked pay type for all shift hours that occur on the holiday, as defined by the 24-hour period specified in the 24 Hour Start Time field below. If left unchecked, employees can only receive the worked pay type if they have punched in for day on the actual holiday date.

**24-Hour Start Time**
If the *Pay For 24 Hours* option is enabled, you must define the time the holiday begins for payroll purposes. The holiday will start at the time set here on the day before the holiday and will end 24 hours later.

**EXAMPLE:** A healthcare facility is staffed 24 hours a day, seven days a week, and employees receive a special pay type for all hours worked on a holiday (the special pay type is defined in the Worked Pay field in all holiday classes). Due to shift times, holidays begin at 10:00 p.m. the day before and end at 10:00 p.m. on the holiday, and employees receive the special pay type only for worked hours that occur within this window. To achieve this functionality the *Pay For 24 Hours* rule is enabled, and the 24 Hour Start Time field is set to 22:00. An employee who works from 9:00 p.m. on the day before a holiday to 5:00 a.m. on the holiday receives the special pay type for seven of the eight worked hours.

**Criteria for Receiving Holiday**
The *Criteria For Receiving Holiday* are qualifiers that must be met in order for employees to receive automatic holiday hours. Descriptions of these options are provided below.

**# Days Employed**
Defines the minimum number of days employees must be employed to receive a paid holiday. The *Hire Date* field in the Employee Setup section is used to verify the number of days individuals have been employed. Leave this field set to zero if the number of days employed is not a qualifier for receiving paid holidays.

**# Days Worked**
Defines the minimum number of days employees must have worked to qualify for a paid holiday. The *Days Worked* field in the Employee Setup section is used to verify the
number of days individuals have worked. Leave this field set to zero if the number of
days worked is not a qualifier for receiving paid holidays.

**Receive Holiday Hrs**
Defines the situations in which holiday hours (of the pay type defined in the **Non Worked Pay** field) are paid to employees. The five options available in the drop-down menu are described below.

- **Always**
  Indicates that holiday hours are paid to qualifying employees whether or not the holiday is worked. Qualifying employees who work on holidays receive both automatic holiday hours (of the pay type defined in the **Non Worked Pay** field) as well as any worked hours (of the pay type defined in the **Worked Pay** field).

  **EXAMPLE:** Employees are frequently called in to work on holidays. Employees who work on holidays receive eight hours of holiday pay plus the regular hours worked. Employees who do not work on holidays receive only the eight holiday hours. The holiday class to which these employees are assigned is configured with the regular pay type defined as the worked pay type and the holiday pay type defined as the non-worked pay type. The **Receive Holiday Hours** field is set to **Always**.

- **If Not Worked**
  Indicates that holiday hours are paid to qualifying employees only if the holiday is not worked. Qualifying employees who do not work on holidays receive automatic holiday hours (of the pay type defined in the **Non Worked Pay** field). Qualifying employees who work on holidays receive only the worked hours (of the pay type defined in the **Worked Pay** field).

- **If Worked**
  Indicates that holiday hours are paid to qualifying employees only if the holiday is worked. Qualifying employees receive both automatic holiday hours (of the pay type defined in the **Non Worked Pay** field) as well as the worked hours (of the pay type defined in the **Worked Pay** field).

- **If Scheduled**
  Indicates that holiday hours are automatically paid to qualifying employees who are scheduled to work on a holiday, regardless of whether or not they work on the holiday. Qualifying employees who are scheduled to work on a holiday receive automatic holiday hours (of the pay type defined in the **Non Worked Pay** field).

- **If Scheduled And Worked**
  Indicates that holiday hours are paid to qualifying employees only if they are scheduled to work that holiday and they work the scheduled shift. Employees will receive worked hours of the pay type defined in the **Worked Pay** field and a pay record with the pay type defined in the **Non Worked Pay** field.
**Work Day Before/After**
Defines whether or not employees are required to be present the day before or the day after a holiday in order to receive holiday pay.

**WARNING:** If an employee is scheduled in EmpowerTime, the previous and next days are counted as the previous and next days scheduled. If the employee is not scheduled, EmpowerTime looks at the calendar days immediately before and after the holiday. If both scheduled and unscheduled employees receive holiday hours, it may be necessary to create separate holiday classes with different settings in these two fields.

**Record Detail**
The **Record Detail** feature allows users to define which organization levels are assigned on a holiday. If the **Record Detail** field is set to **Home**, employees will be assigned to their default organization levels. If **First Worked** is selected, then the employees will be assigned to the organization level used at the beginning of the day if the level is different from the default. If **Last Worked** is selected, the employees will be assigned to the organizational level used during the last segment of the day. To select which organization levels will be affected in this holiday rule, check the appropriate boxes below the **Record Detail** field.

**Worked Pay Types**
Defines the pay types that indicate worked days for the **Work Day Before** and **Work Day After** qualifiers as well as the organization codes configured in the **Record Detail** section. Regular and overtime pay types are usually the only pay types selected. Click the browse button and select the appropriate pay types from the left pane of the Qualifying Pay Types window. Double-click any pay type or use the > button to move it to the right pane.

**TIP:** If the **Work Day Before** and **Work Day After** qualifiers are enabled and two or more holidays occur on consecutive days (e.g., Christmas Eve and Christmas Day), the holiday pay type must be selected as one of the Worked Pay Types in order to pay qualifying employees for the holidays.

**Holiday Dates**
To define the calendar dates of company-recognized holidays, click the Add button along the lower-left side of the Holiday Classes window. Using the **Holiday Class Date Edit** window, shown in the following figure, enter the date of a holiday, the number of hours to credit qualifying employees for that day, and a description of the holiday. Repeat this process until the dates for all company-recognized holidays for the entire year have been defined.
Repeat the processes described above until a holiday class has been created for each different group of employees. Keep in mind that dates and the number of hours to pay to qualifying employees for holidays must be defined in each holiday class. In addition, the dates of company-recognized holidays must be reentered every year for each holiday class, as EmpowerTime does not roll holiday dates forward.

**WARNING:** Holidays do not automatically roll forward at the end of a year because holiday dates vary year to year. Once a holiday has passed and the pay period in which the holiday occurred has been closed, the date of the holiday should be added to the next year.

### Mass Updating Holiday Dates

If multiple holiday classes are set up within a company, it is often faster to mass update dates rather than updating the dates in each holiday class separately. Several mass update options are available in the Holiday Classes drop-down menu in the Holiday Classes section, or from the Processes button located at the top of the Holiday Class Detail window. These options are described below.

**Duplicate Holiday Class**

Creates a new holiday class by duplicating all holiday class rules and dates. When enabled, EmpowerTime prompts for the holiday class to copy as well as the code for the new holiday class.

**Duplicate Holiday's Dates**

Copies holiday dates, descriptions, and hours from one holiday class to another. When enabled, EmpowerTime will prompt for the holiday classes.

**Mass Add Date**

Adds a holiday date, description, and number of hours for all holiday classes set up in the current company.

**Mass Delete Date**

Deletes a holiday from all holiday classes in the current company that have the date.
CHAPTER 10—ATTENDANCE PLANS

10.1 Overview

Attendance plans are optional rule sets that govern how employees use benefit hours like vacation and personal leave. The attendance plans to which employees are assigned function like banks of hours for specific pay types, ensuring that employees do not exceed the number of benefit hours they have earned. In addition, attendance plans can force EmpowerTime users to enter benefit hours in specific units, adhere to minimum limits, or adhere to maximum limits.

Depending on how employee benefits are administered, attendance plans can be set up a number of different ways. One method is to create different attendance plans for different pay types. For example, two plans could be created—one for sick leave and another for vacation—so that the balances and pay types are tracked separately. Alternatively, a single plan could be created for both sick leave and vacation pay so that a single balance covers both pay types. Different plans can also be created for different groups of employees that are subject to different attendance rules. The differences and benefits of various attendance plan configurations are described throughout this chapter.

Once all necessary attendance plans have been created, employees are assigned to the appropriate plan(s) and allotted segments of time for use throughout the course of a year. Attendance balances must be manually entered for each employee assigned to one or more attendance plans. However, attendance balances can be accrued in EmpowerTime™ using the Benefits Manager module, or balances can be imported from another business system using an EmpowerTime import module. For more information on the Benefits Manager module or EmpowerTime import modules, please contact Empower Technical Support or your Empower Software Solutions representative.

WARNING: If the Benefits Manager module is installed, the Attendance Plans section is replaced by Benefits Manager. Refer to the documentation included with Benefits Manager for more information on configuring the Benefits Manager module.

To access the Attendance Plans notebook, click on Attendance Plans in the Rules Setup dropdown menu.
10.2 Creating Attendance Plans

By default, no attendance plans are set up in newly created companies. To create an attendance plan, click on the **Add** button at the bottom of the screen. Attendance plans can be edited using the **Edit** button or by double-clicking the attendance plan to be edited. Adding or editing attendance plans will display the Attendance Plan Detail window. When adding plans, a plan code and description should be entered. Attendance plan codes may be up to 10 characters long and may include letters, numbers, symbols, and spaces. Next, enter a description for the plan and configure all necessary fields. Descriptions of the fields in the Attendance Plans section are provided below.
Qualifiers

Qualifiers determine when employees are eligible for enrollment in an attendance plan and how hours may be deducted from employees’ attendance banks.

Units Taken In

Defines the units in which hours must be deducted from an employee’s attendance bank. If set to two as shown in the example above, time can only be taken from the plan only in increments of two hours.

Enforce Minimum Hours

Defines whether or not a minimum number of hours must be taken when benefit hours of the pay type(s) covered by the currently displayed plan are entered for an employee. Check this feature to enable it, and enter a minimum number of hours.

Enforce Maximum Hours

Defines whether or not a maximum number of hours must be taken when benefit hours of the pay type(s) covered by the currently displayed plan are entered for an employee. Check this feature to enable it, and enter a maximum number of hours.

Required Number Of Days Employed

Defines the minimum number of days an individual must be employed before time can be taken from his or her attendance bank. Employees who do not meet the minimum number of days requirement may be assigned to the plan but cannot use time from their balances until the minimum number of days is worked.

Plan(s) Where Hours Must Be Zero

Defines any other attendance plans that must have a balance of zero hours before an employee can take time from the currently displayed plan. To define plans that must be zeroed out before hours in the current plan can be used, click the Dependent Plans button and select all appropriate plans from the left pane. Double-click a plan, or highlight the plan and click on the > button, to move it to the right pane. All attendance plans must be created before defining dependent plans.

EXAMPLE: Each employee must use all time available in the personal leave attendance plan before time can be taken from the vacation attendance plan. To achieve this functionality, the plan covering personal leave is designated as a dependent plan in the configuration of the vacation attendance plan.

Pay Types and In Plan

Defines the pay type or pay types that are covered by the current attendance plan. All pay types set up in the current company are available in the left pane. Use the > button or double-click pay type headings to move pay types included in the current plan to the right pane. An unlimited number of pay types may be covered in an attendance plan, but usually only one or two pay types are covered in a single plan.

WARNING: Employees cannot be assigned to multiple attendance plans that cover the same or overlapping pay types. In other words, an employee assigned to an attendance plan that covers the Vacation pay type cannot be assigned to another plan that covers both the Sick and Vacation pay types. Each pay type can only be represented in an attendance plan one time per employee.
EXAMPLE: Hourly employees receive 20 hours of sick or personal leave per year, while salaried employees receive 15 hours of both sick and personal leave. Three plans are set up to accommodate this policy. The first plan includes both the personal leave and sick leave pay types. The second plan is set up to cover only sick leave, and the third plan is set up to cover only personal leave. Hourly employees are assigned to plan 01 and given a 20-hour balance that can be used for either type of paid leave. Salaried employees are assigned to both plans 02 and 03 and are given a 15-hour balance in each. Thus, salaried employees have two different balances from which hours are deducted separately when sick or personal leave time is taken.

10.3 Enrolling Employees in Plans and Defining Balances

There are several ways to enroll employees in attendance plans and enter or update attendance balances. These methods are summarized below and described in greater detail in the following sections.

1. Manually enroll employees in attendance plans and enter the available balances plan-by-plan and person-by-person.
2. Use the Mass Add Plans feature to enroll employees in attendance plans and define balances for common groups of employees.
3. Import attendance balances from payroll, human resources, or another business system.

Attendance balances can be imported from most payroll or human resources systems that have the capability to export attendance balances in text files. Both attendance plans and balances can be imported from select systems. Contact Empower Technical Support for more information.

REMINDER: The benefit hours tracked by attendance plans can be accrued within EmpowerTime using Benefits Manager, an add-on EmpowerTime module. If Benefits Manager is installed, attendance balances do not need to be imported or manually entered.

Manually Enrolling Employees in Attendance Plans

Once all necessary attendance plans have been created and employee records have been set up within EmpowerTime, employees must be enrolled in the appropriate attendance plans. To manually enroll employees in attendance plans, open the Employee menu in the navigation pane and click the Attendance option.
The Attendance window is split into three sections. The upper section displays the attendance plans in which the current employee is enrolled as well as the available balances. The middle section displays any transactions (pay records) that deducted time from the attendance balances available to the employee. The bottom section displays any time off requests made by that employee.

Locate an employee to enroll in an attendance plan and then click the Add button along the left side of the Attendance screen. Select the appropriate plan from the pop-up window. Repeat this process to enroll an employee in multiple attendance plans, but keep in mind that an employee cannot be assigned to two attendance plans that cover the same pay type.

Once an employee has been enrolled in an attendance plan, it is listed in the top section of the Attendance screen with a balance of zero hours. Double-click the plan or click the Summary button to display the Plan Summary Edit window. This window displays the pay types that are covered by the attendance plan and allows an initial (carryover) balance of hours to be entered. If attendance balances are not imported from another business system, enter the number of hours available to the employee for the attendance plan and save the changes. If the employee is assigned to multiple attendance plans, use the Prior and Next buttons to scroll through each plan and add attendance balances.
Repeat the steps described above to enroll all applicable employees in attendance plans and enter the initial balances. Use the function buttons in the Plan Summary Edit window to enroll the current employee in additional attendance plans, delete plans from the employee, and save and cancel edits.

**REMINDER:** Attendance balances can be imported from most human resources and payroll programs that have the capability to export attendance balances in text files. Please contact Empower Technical Support for more information about importing attendance plans and balances.

**Mass Adding Attendance Plans and Balances**

The **Mass Add Attendance Plan** feature provides a fast way to enroll groups of employees in the same attendance plan and, if desired, enter the same initial balance. To access the **Mass Add Attendance Plan** feature, click on the **Processes** drop-down menu and go to **Attendance → Mass Add Plan**.

Use the **Mass Add Attendance Plan** window to select an attendance plan. If desired, enter an initial balance to be made available to each employee that will be enrolled in
the plan. To enroll a group of employees in a plan without assigning an initial balance, simply leave the Initial Available option blank.

By default, the Mass Add Attendance Plan feature updates all employee records in the current company with the selected plan and balance unless a filter is defined. To update a specific group of employees rather than all employees in the company, click the Set Filter button and define a filter. For more information on creating filters, see Chapter 19—System Utilities.

Once all necessary options have been configured, click the Save button to run the mass update. Be sure to check that the desired attendance plan and balance (if applicable) has been correctly applied to all selected employee records.

**WARNING:** Ask the EmpowerTime or network administrator to make an external backup of the EmpowerTime directory before making changes with the Mass Add Punch feature. There is no undo feature that can be used to reverse incorrect changes.

### 10.4 Using Attendance Plans

Once employees have been enrolled in appropriate plans and assigned initial balances, EmpowerTime can begin tracking paid time-off balances. Paid time-off hours are entered into EmpowerTime as pay records. When a pay record is entered that corresponds to a pay type covered in an employee’s attendance plan, time is deducted from the available balance of that plan. In addition, an attendance transaction is automatically listed in the middle section of the Attendance window to reflect the date on which hours were deducted from the balance.

![Attendance Balances and Transactions](image)

The preceding figure demonstrates how attendance transactions are recorded and deducted. In this example, the employee is assigned to a single attendance plan that covers both the vacation and personal leave pay types. The employee has accrued 54.16 vacation hours and has taken 48 of those hours. The remaining balance of vacation hours is 6.16.

**REMINDER:** Pay records are entered on the Timecard screen in the Employee Setup section, not on the Attendance screen. For more information on entering and editing pay records, see Chapter 14—Timecards, Pay Records, and Approvals.
Whenever a pay record deducts hours from an attendance balance, the transaction is automatically recorded in the lower half of the Attendance screen for reference. To customize an attendance transaction with an additional comment, simply double-click the appropriate transaction or click the Comment button and enter the comment in the Attendance Transaction Edit window.

Attendance balances are automatically updated whenever pay records are entered, but from time to time the Attendance screen may require a manual update. To recalculate attendance balances for all employees or a single employee, click on the Processes drop-down menu and choose Recalculate Summary from the Attendance sub-menu. From the Recalculate Summary menu, the current employee or all employees can have their attendance balances recalculated. The posting process also updates attendance balances.

If an EmpowerTime user enters a pay record that exceeds the number of hours available to an employee, an error is generated as shown in the example below. The pay record cannot be saved unless the number of hours is modified to fit within the employee’s balance or unless the exception is overridden manually.

Figure 74: Pay Record Resulting in a Negative Balance

EmpowerTime provides a similar error messages if a pay record is entered that does not meet the minimum hours, maximum hours, dependent plans, units taken in, or minimum days employed rules defined in the corresponding attendance plan. If the...
user entering the pay record has been given the right to do so, he or she may override these error messages to allow the entry of the invalid pay record. This procedure is described in the following section.

**REMINDER:** Run the Post Punches process or the Recalculate Summary process after adding pay records or making changes to attendance plans in order to update the balances for each plan. The Post Punches button is located on the Activities → General screen.

### 10.5 Overriding Attendance Policies

Some EmpowerTime users may be given the right to override attendance rules. For example, an attendance rule that prevents employees from exceeding their balances can be overridden in order to allow entry of a pay record. Similarly, users with this level of permission can also override any minimum days employed or dependent plan attendance policies. Permission to override attendance rules is granted per user ID in the User Setup section.

To grant a user permission to override attendance rules, locate the user’s record and check the **Override Attendance Rules** box located in the lower-left corner of the User Setup Detail window. Be sure that this option is not checked in the setup of any users who do not have permission to override attendance rules.

As shown in the following figure, users who have permission to override attendance rules are prompted with an override option when an invalid pay record is entered. The exact prompt may differ depending on the attendance rule conflicting with the pay record.

![Employee Pay Records]

**Figure 75: Negative Balance Error Message**

**REMINDER:** User IDs are described more thoroughly in Chapter 11—User Setup.
10.6 Moving Attendance Transactions to the Historian

When attendance transactions are moved to the Historian, all transactions are purged from the lower half of the Attendance screen in the Employee section and employees' attendance plans are rolled back to the initial balances. Attendance transactions can be automatically purged to the Historian during the pay period closing process or purged manually. By default, new companies in EmpowerTime are configured to automatically move attendance transactions to the Historian at the end of each pay period.

Unless attendance balances are calculated in EmpowerTime by the Benefits Manager module or imported from another business system, attendance transactions should not be automatically purged to the Historian at the end of each pay period. To enable or disable the automatic purge of attendance transactions during the pay period closing process, locate the Move Attendance To Historian During Close Pay Period option in the Rules Setup → Company Setup → System Options 2 section.

If attendance balances are not imported or calculated by Benefits Manager, attendance transactions should be manually moved to the Historian one time per year. To manually purge attendance transactions to the Historian, navigate to the Activities → General section, check the End Of Pay Period box on the Activities screen and click the Move Attendance button. If multiple pay periods are set up in the current company, EmpowerTime prompts for the pay period to be purged.

**TIP:** If the purging process is executed manually, it should be executed on the same date every year. Keep in mind that the date selected is the date on which all employees’ attendance balances are reset.
11.1 Overview

User IDs define the drop-down menus, employee records, reports, and functions each user is permitted to access in EmpowerTime™. Establishing effective system security is extremely important. Well-thought-out user IDs and permissions prevent unauthorized access to sensitive information and processes while creating a division of labor in timekeeping administration. A license must be purchased for each user or “seat” that accesses EmpowerTime. An EmpowerTime or network administrator should be responsible for creating and managing user IDs and permission levels.

![EmpowerTime Logon Screen](image)

In addition to controlling system access, user IDs are recorded in an audit trail whenever users edit employees’ punches or hours or activate critical system processes. By establishing and assigning unique user IDs, EmpowerTime administrators can ensure that all changes and actions can be traced back to specific users.

11.2 Creating and Copying User IDs

User IDs, passwords, and permissions are defined in the User Setup section. To access the User list screen, click on User Setup in the Rules Setup drop-down menu.
EmpowerTime™ User Guide

CHAPTER 3 – COMPANY SETUP

Page | 127

NOTES

Figure 77: User Setup

REMINDER: EmpowerTime is installed with a Default user ID and a Master user ID. The Default user ID should be changed or deleted once other User IDs are established. The Master ID cannot be deleted, but the password can be changed.

From the User Setup screen, you can add new users with the Add button. Existing user accounts can be edited by double-clicking the desired user or by highlighting the desired user then clicking Edit. Users accounts that are no longer needed can be disabled by changing the Status field on the User Setup Detail screen to Terminated. Disabled user accounts will continue to display on the user list, but they will no longer be editable or usable.
Use the buttons in the toolbar at the top of the screen to move between user ID records, add and delete records, and save and cancel changes. To create a new user ID, click the **Add** button and enter a new user ID and password at the appropriate prompts. User IDs and passwords may be up to 10 characters long and may include letters, numbers, symbols, and spaces.

The **Windows User Name** field defines the domain login associated with the EmpowerTime user ID. This field is only used when windows authentication for EmpowerTime is enabled. See the EmpowerTime Installation Guide for further details.

The **Workflow** field defines the set of features displayed on the Home tab for EmpowerTime users. Specific workflows can be defined in the **Rules Setup → Workflow Configuration** section.

**TIP:** Users can change their passwords at any time by selecting the **Change Password** option from the **File** menu at the top of the main EmpowerTime screen.
User permissions are assigned on the User Setup screen, and user ID filters are defined on the Filters and Queries screens. If many different user IDs need to be created, it may be faster to create and configure one user ID and then duplicate it to create other IDs. To copy a user ID, select **Duplicate User** from the **User Setup** drop-down menu at the top of the screen. EmpowerTime will create a duplicate copy of the currently displayed user with the User ID and Password specified in the Duplicate User dialog window.

![Duplicate User Dialog Box](image)

**Figure 79: Duplicate User Dialog Box**

### 11.3 Defining Menu Styles

Each user ID must be assigned to one of the two menu styles available in EmpowerTime. An Organizer ID gives a user access to the Organizer menu, while a Supervisor ID gives a user access to a customized Supervisor menu. Organizer IDs are generally reserved for administrators and high-level users, while Supervisor IDs are ideal for users who need a limited level of system access. New user IDs are designated as Organizer IDs by default.

To assign a user ID to a menu style, select the appropriate option from the **Menu** drop-down menu.

**Organizer IDs**

The Organizer Notebook menu displays links to every section and option available in EmpowerTime. Depending on permissions, some users who view the Organizer Notebook menu may not be able to access all of the options, while other users may have full access to all options. Organizer IDs are best suited for high-level users who require access to most if not all sections of the program. To restrict permissions on Organizer IDs, simply uncheck the appropriate boxes or select restricted rights from the drop-down menus as described later in this chapter.

**Supervisor Menu IDs**

Supervisor IDs are designed to provide low-level users a simpler point of access to the sections, functions, and reports they need to use. Supervisor menus are fully customizable per user and can be tailored to the needs of any EmpowerTime user. Supervisor IDs should never be created for the EmpowerTime administrator or high-level users.
To configure a supervisor menu, click the **Menu Setup** button and select the appropriate options from the left pane of the **Supervisor Menu Setup** window.

To grant a user ID access to a function or report, simply locate and double-click the desired feature to move it to the **Selected Features** pane. Alternatively, the function buttons in the center of the window can be used to move features between panes.

Once all desired options have been added, permissions for the ID must be configured. Although a supervisor ID does not provide access to the entire system like an organizer ID might, those sections the ID can access still retain the default full permissions. To restrict permissions, uncheck the appropriate boxes or select restricted rights from the drop-down menus as described later in this chapter.

### 11.4 Defining Permissions in User Setup

By default every new user ID is granted full permissions to employee records, system functions, and reports. If a user should not have full system access, permissions must be restricted. Users who attempt to access a restricted screen or function receive a warning letting them know they lack proper rights. Explanations of each group of permissions in the User Setup section are provided below.

**Processes**

Defines permissions to various EmpowerTime processes. Permissions to execute the posting process, pay period closing process, the payroll export, and the option to decline approved TORs are typically given only to the EmpowerTime administrator and primary operators. The options available in the **Approvals** drop-down menu are Full,
Partial, and None. Full access allows a user to both approve and unapprove records. Partial access only allows a user to approve records.

**Employee**
 Defines permissions to the tabs in the Employee Setup section. The options available in the drop-down menus are Update, View, and None. Supervisor-level users are often given view-only access to the Setup tabs. Note that setting the Schedules option to None prevents access to both the Employee Scheduler as well as the Schedule screen in Employee Setup.

The Override Attendance Rules option defines whether or not a user can override attendance policies when entering pay records (e.g., allowing an employee’s balance to go negative). By default this permission is not granted to new user IDs, and it is typically reserved for administrators and primary operators. For more details on attendance, see Chapter 10—Attendance Plans.

**Reports**
 Defines permissions to run the reports available in EmpowerTime. Reports are grouped together by report type in this section, so removing the check mark from one report type may restrict access to multiple reports. Permissions to run Payroll and Audit reports are typically reserved for administrators and primary operators.

**Disable IP Address**
The Disable IP Address button will open a window listing all IP addresses used to log on to the current user account. To disable a certain IP address from accessing the user account in the future, check the Disabled box to the right of the appropriate IP address. Users with access to the User Setup section will be able to use this feature.

**Setup Functions**
Defines permissions to the Rules Setup menu. Permissions to access Rules Setup are typically reserved for administrators and primary operators. If employees’ pay rates are recorded in EmpowerTime, permission to view pay rates can be restricted for specific users. To remove permission to view pay rates, uncheck the box next to View Rates.
Times can be displayed in EmpowerTime in either military (24-hour) or standard (12-hour) format using the Time Format option. The Schedule Templates field defines permissions to the Schedule Template Setup feature. The options available in the drop-down menu are Update, View, and None. The WebEntry Super Mode field applies only if the WebEntry data-collection module is installed. Contact Empower Technical Support for more information about WebEntry.

The Pay Class and Job options will enable or disable a user’s ability to edit those fields in employee timecards and the Scheduler section of EmpowerTime. If either of these fields are unchecked, the user would only be able to view an employee’s assigned Pay Class or Job Code. That user would also be unable to edit Pay Class or Job Code rules.

The Use Programs option will provide or prevent access to the Programs menu in EmpowerTime. The Programs menu is typically used to provide easy access to EmpowerTime interfaces. However, many EmpowerTime clients prefer to disable access to this menu for many users so that user cannot view and access other applications installed on the EmpowerTime server.

The Remaining Setups option enables or disables all other Rules Setup menu options that are not specifically labeled in other fields. This includes Company Setup, Holiday Classes, and Employee Workgroups.

**WARNING:** All users other than the EmpowerTime administrator should be denied access to the User Setup and Purge Audit functions. Great consideration should also be given as to whether or not users should be able to view pay rates and access other sections in Rules Setup.

**REMEDY:** Once user IDs have been set up, the Default user ID should be deleted to prevent unauthorized access to the program. In addition, the password for the Master user ID should be changed. These are usually the last steps in the process of setting up user IDs.

### 11.5 Filters and Custom Queries

The Set Filter and Select Companies buttons in the User Setup Detail screen lead to two utilities that determine which companies and which employees within those defined companies can be accessed by a particular user ID. The Labor Filter feature allows you to filter employees by organizational level codes. Additionally, the Custom Queries feature is a utility found in the Employees and Scheduler sections of EmpowerTime that allows users to create and save their own custom employee filters.

![Figure 81: Set Filter and Select Companies](image)
Employee Filters

Employee filters restrict the employee records that users are permitted to access. For example, an employee filter could restrict a user to viewing employees assigned to a specific department or job code. Employee filters can be established on both organizer and supervisor user IDs, but by default no filters are established on new user IDs.

![Employee Filter Setup](image)

Figure 82: Employee Filter Setup

To establish a filter on a user ID, click the **Set Filter** button to access the Filter setup window as shown in the preceding figure. Setting up filters on user IDs is no different than creating filters in any other section of EmpowerTime. For more details on establishing filters, see Chapter 19—System Utilities.

Labor Filters

Labor filters are another way to restrict which employee records users can view. This filter allows users to view employee records based on assigned organization levels. The labor filter is frequently used by companies whose employees work under multiple organization levels throughout the pay period. For more information on establishing filters, see Chapter 19—System Utilities.

**EXAMPLE:** A supervisor has access to employee records that are assigned to the company’s East location. Several employees work part time in the East location and part time in other locations within the company. The supervisor of the East location will be able to view records that are assigned to the East location code, but not records assigned to other location codes.
Company Filters

Company filters restrict the companies that users are permitted to access. For example, a company filter could restrict a user to ZSI, the sample company included with EmpowerTime. Company filters can be established on all user IDs. By default, each new user ID is granted access to all companies set up in EmpowerTime. To select the companies accessible by a user, click on the ellipsis button to the right of the Companies section.

To restrict a user ID from accessing specific companies in EmpowerTime, select the company to be removed, and then use the left arrow button to move that company from the Selected Companies to the Companies list. Any companies on the left side of the screen will not be viewable by the selected supervisor.

Figure 83: Select Companies
Custom Queries

Any user with the appropriate permissions can create custom queries without having to modify their filter in User Setup. By filtering employees to a specific group, supervisors can quickly process schedules and timecards or make changes just to that group. Custom queries can be created from the Employee Scheduler screen, and they can then be used in all of the Employee tabs and most of the Attendance tabs. To create a custom query, click the ellipsis button to the right of the Custom Query field at the top of the Employee Scheduler screen.

Users can sort columns into ascending or descending order by clicking the column header. The list can also be filtered using the drop-down menus at the top of each column.

Figure 84: Custom Query Configuration
11.6 Workflow Configuration

Workflow configuration options can be defined by clicking on Rules Setup → Workflow Configuration.

![Workflow Configuration](image)

Figure 85: Workflow Configuration

The code and description in the Workflow Configuration identify the settings for assignment in user setup and should indicate which users they should be assigned to. Each option within the Home, KPI, and Messages sections refers to an available option in the user’s Workflow. Users can click on any available option from the navigation pane and that option will appear in the Home tab as a workflow option. The order in which the options display on the navigation pane can be changed using the Up and Down buttons. The name of each option can be changed using the Task Properties button.

11.7 Security Templates

Security templates are used to create common permission sets than can be applied to users. This makes the process of adding multiple similar supervisors in EmpowerTime faster and easy.
Security Templates can be created by clicking on the Add button along the top of the form. The template ID and description should make it easy to identify the type of permission set it represents. This will make it easier to choose the correct template when assigning them to users.

After the ID and description are defined, creating a template is the same process as defining permissions in the User Setup. For detailed descriptions of permissions, see the User Setup section earlier in this chapter.
CHAPTER 12—EMPLOYEE SETUP

12.1 Overview

The Employee section contains the setup records, timecards, pay records, schedules, and other important information for each employee tracked by EmpowerTime™. This chapter describes each of the options in the Employee Setup section as well as the process of setting up and configuring new employee records. To open the Employee Setup section, click Employees in the navigation pane or select any of the options found in the Employees submenu in the Employees drop-down menu.

![Employee Menu](image)

**REMINDER**: Employee records are typically imported from a payroll or human resources system to expedite the setup process. If employee information cannot be imported using an EmpowerTime employee import module, all employee records must be manually entered in the Employee Setup notebook. Additional setup is usually required even if employee information can be imported from another program, as employees must be assigned to EmpowerTime-specific codes (such as pay class and holiday class codes) that cannot be imported from outside sources.

![Employee Records](image)
12.2 Drop-Down Menu Options

The Processes drop-down menu located at the top of the Employee Setup notebook provides access to various tools and actions. The options in the Processes drop-down menu are specific to the Employee Setup notebook and are described below.

Change Employee ID
Changes the current employee’s employee number. For more about changing employee numbers, see the Changing Employee Numbers section in this chapter.

Change Badge Number
Changes the current employee’s badge number. For more about changing badge numbers, see the Changing Badge Numbers section later in this chapter.

Clear Badge
Deletes the current employee’s badge number. This feature is used to clear the badge number of an employee who has been terminated or is inactive so that the badge number can be reissued to another employee. For more about clearing badge numbers, see the Changing Badge Numbers section later in this chapter.

Duplicate Employee
Creates a duplicate record of the selected employee but with a different employee number, badge number, name, address, etc.

Mass Update
Performs a mass update on a field in the employee database. For more information on mass updates, see the Mass Updates section later in this chapter.

Mass Add Punch
Performs a mass punch addition to selected employees’ timecards. To learn about mass adding punches, see the Mass Add Punch section later in this chapter.

Mass Add Pay Records
Performs a mass pay record addition to employee records. For more about mass adding pay records, see the Mass Add Pay Records section later in this chapter.

Auto Fill Scheduled Punches
Reserved for use by Empower Technical Support. This feature is password protected.

Personnel Snap Shot
Provides access to the Personnel Snap Shot window. This feature offers a quick summary of the total number of employees in the database, the number of terminated and active employees, pay period assignments, salary and hourly assignments, and timecard approvals.

Attendance
Provides access to the Recalculate Summary, Mass Add Plan, and Mass Update Plan options. For more about these features, see Chapter 10—Attendance Plans.
12.3 Creating and Navigating Between Employee Records

The navigator toolbar located at the top of the Employee Setup notebook contains buttons for adding and deleting employee records, saving and canceling changes, navigating between employee records, searching for employee records, and applying filters and custom queries. Hover your mouse pointer directly over the buttons in this toolbar for pop-up hints.

![Employee Record Navigation Toolbar](image)

The arrow buttons can be used to scroll through employees one at a time, or to navigate directly to the first or last employee.

To create a new employee record, click the **Add** button in the navigator toolbar and enter a unique employee ID and badge number at the appropriate prompts. Employee IDs and badge numbers may be up to nine characters long. Badge numbers shorter than nine characters are padded with leading zeros. Employee ID numbers must match the ID numbers in payroll, human resources, and any other systems with which EmpowerTime is integrated. In many cases employee IDs and badge numbers are the same.

To permanently delete an employee record, locate the appropriate record and click the **Delete** button in the navigator toolbar. Keep in mind that deleting an employee's record removes all data corresponding to that employee including old timecards archived in the Historian.

**TIP:** Ask the EmpowerTime or network administrator to make an external backup of the EmpowerTime directory before deleting employee records.

To save any changes made to an employee record, click the **Save** button. Be sure to save changes before adding a new record or navigating to a different one.

To locate a specific employee record, click on the search button in the navigator toolbar to activate the Search window as shown in the example below. The employee records listed in the Search window can be ordered by **Last Name**, **Badge Number**, or **Employee ID**. Select the desired search order from the drop-down menu. Next, enter the first few
letters of the employee’s last name, badge number, or employee number and the search engine will begin locating the record. Alternatively, you may scroll down the list using your mouse or the arrow buttons on your keyboard. To select an employee, double-click the desired record or highlight it and click the OK button. Once a search order has been selected, it will remain as the default until changed to another search order.

![Figure 89: Employee Search](image)

The filter button allows users to narrow down the employees that are included in their employee filter. For example, a user who is allowed to see all active employees can narrow down the number of employees in their list by choosing a specific supervisor from the filter field at the top of the department column. This would allow the user to only see employees assigned to the specific supervisor of their choice. Predefined filters can be applied to a specific user’s view by choosing a predefined custom query.

![Figure 90: Employee Filter](image)
12.4 Main Screen

The Main screen contains basic employee information such as name, address, date of hire, active status, and organization level assignments. Most of the information that can typically be imported is contained on this screen. If a link with a human resources or payroll program has been established using an EmpowerTime employee import module, the information on this screen can be quickly updated as often as is necessary. If employee information is not imported from an external source, the fields on this screen must be manually configured and updated.

![Employee Main Screen](image)

Figure 91: Employee Main Screen

Descriptions of the fields on the Main screen are provided below.

**NOTE:** All fields marked with an asterisk (*) must be configured for every active employee in order for EmpowerTime to correctly calculate employees’ hours.

**Name**
Displays the current employee’s complete name. This field combines the First Name and Last Name fields. Although names are not necessary, locating specific employees’ records without names is more difficult.

**Employee ID**
Displays the ID number assigned to the current employee when the record was first created. ID numbers may be up to nine characters long and must match the ID numbers set up in payroll and human resources systems.

**First Name**
Defines the current employee’s first name. This field is 14 characters long.
Middle
Defines the current employee's middle initial. This field is one character long.

Last
Defines the current employee's last name. This field is 25 characters long.

Street1 and Street2
Defines the current employee's street or mailing addresses. Both fields may be used for long addresses. Each field contains up to 28 characters.

City, State, Zip
Defines the current employee's home city (up to 20 characters long), state (up to three characters long), and zip code (up to 10 characters long).

Home Phone
Defines the employee's home telephone number (up to 10 characters long).

SSN
Defines the current employee's Social Security Number. Social security numbers may be up to nine characters long.

NOTE: We highly recommend leaving this field blank unless you have a very specific reason to record social security numbers in EmpowerTime. With cases of identity theft on the rise, everyone can appreciate having their personal information in as few places as possible. Most customers only need to track employee social security numbers in their human resources records.

*Hire Date
Defines the date on which the current employee was hired. When a new employee record is created this field defaults to the current date.

Supervisor
Defines the current employee’s supervisor. Click the browse button to select a supervisor. Note that employee records must be created for supervisors before employees can be assigned to supervisors. Supervisor assignments create useful groups for sorting reports and establishing filters.

Pay Rate
Defines the current employee's rate of pay. Pay rates are optional but may be necessary for reporting purposes and special premium calculations. Permission to view rates can be removed from user IDs. For more details on setting up user IDs, see Chapter 11—User Setup.

*Pay Freq
Defines the pay period to which the current employee is assigned. Pay periods are set up in the Company Setup notebook, and different employees may be assigned to different pay periods. For example, hourly employees might be assigned to a weekly pay period, while salaried employees are paid semi-monthly. Be sure to assign all employees to a valid, active pay period.
**Salary/ Hourly**
Defines whether the current employee is paid as a **Salary, Hourly**, or **Salary With Hours** employee. Employees who punch are typically hourly. Employees who are automatically paid by payroll are typically salaried. Salaried employees who must have hours passed to payroll by EmpowerTime are defined as Salary With Hours. Salary With Hours employees automatically receive pay records in EmpowerTime each week to account for standard hours. These pay records can be altered on an exception basis for days of vacation, personal leave, etc.

![Salaried Hours](image)

Figure 92: Salary With Hours Configuration

If **Salary With Hours** is selected, the button just to the right of the field is enabled. Click this button to view the Salaried Hours window as shown in the figure above. Use the options in this window to define the number of hours per pay period the employee receives and the days of the week for which those hours are earned. The pay records Salary With Hours employees automatically receive are created using the pay type defined in the **Salaried Pay Type** field on the **Overtime/Policies** tab in the corresponding pay class.

**EXAMPLE:** An employee is designated as Salary With Hours so that 40 hours per week are transmitted to payroll at the end of each weekly pay period. The employee’s Salaried Hours window is set up just like the figure above, indicating that she earns 40 hours per week distributed in pay records Monday through Friday. The employee automatically receives five eight-hour pay records each pay period, one for each selected day of the week. These pay records are assigned a Salary pay type that is defined in the **Salaried Pay Type** field in the pay class to which she is assigned.

**Active Status**
Defines the current employee’s employment status. The options available in the drop-down menu are **Active**, **Terminated**, **Dependent**, **Leave**, and **Not Employee**. **Terminated** indicates that an employee no longer works for the company. **Dependent** is used for employees who have a record in EmpowerTime for purposes other than collecting hours (e.g., a supervisor who was entered into EmpowerTime only so that other employees may be assigned to him or her). **Leave** indicates an employee who is on temporary leave. **Not Employee** is usually reserved for temporary-hire or contract employees who are not paid directly by the company.

**REMINDER:** When an employee quits or is terminated be sure to change his or her **Active Status**, enter the **Terminated** date, and change the **On Reports** setting. The...
Employee will no longer be listed on reports, but his or her historical data will still be archived in the Historian. However, keep in mind that most EmpowerTime payroll export modules use filters to ensure only active employees’ hours are passed to payroll. If an employee is terminated before the end of a pay cycle, you may need to wait until payroll has been processed before changing his or her Active Status.

**Terminated**
Defines the current employee’s termination date. Termination dates are primarily used in conjunction with the Points Manager module but may be used for increased employee tracking in any scenario.

**Job**
Defines the current employee’s standard job code assignment. The job codes available in the drop-down menu are the codes that have been defined in the Code Tables notebook. Job code assignments provide useful groupings for sorting reports, setting filters, activating special premiums, and tracking labor.

**Shift**
Defines the current employee’s standard shift assignment. The shift codes available in the drop-down menu are the codes that have been defined in the Code Tables notebook. Shift code assignments provide useful groupings for sorting reports, setting filters, activating special premiums, and tracking labor.

**Org Levels**
Defines the current employee’s standard organization level assignments. Up to 10 different organization levels can be defined in EmpowerTime, and employees can be given a home assignment for every level that has been established. The organization codes available in the drop-down menus are the codes that have been defined in the Code Tables notebook. The default organization levels are Division, Department, and Location, but different levels may be defined. Organization level assignments provide useful groupings for sorting reports, setting filters, activating special premiums, and tracking labor. In some scenarios, some levels are considered to be static and require home assignments while other levels are considered to be dynamic and do not require home assignments.

**EXAMPLE:** Four organization levels are set up in a company. Levels one through three are Division, Department, and Location, while level four is Order Number. Employees are given home assignments for levels one through three because these levels are considered to be static, meaning that employees do not often transfer between codes in these levels. Level four is used for labor tracking, and the codes for this level change on a daily basis. Employees are not given home assignments for the Order Number level because the job costing punches they enter throughout workdays define the Order Number codes associated with their hours.

**Photo**
Displays the current employee’s picture. Click on the Load button and locate the picture using the Select a Photo window. Employee pictures must be in bitmap (BMP) format and should not be larger than 30 KB.
12.5 Time Attendance Screen

The Time Attendance screen contains EmpowerTime-specific setup fields that must be configured for each employee in order to ensure that EmpowerTime functions correctly. Depending on the nature of company policies, some of the options on this screen may be unnecessary for some or all employees. However, some options—such as the Pay Class and Error Class settings—are required for each active employee.

Figure 93: Employee Time Attendance Screen

Descriptions of the fields on the Time Attendance screen are provided below. All fields marked with an asterisk (*) must be configured for every active employee.

**Badge#**
Displays the badge number assigned to the current employee when the record was first created. Badge numbers may be changed at any time in case badges are lost or reassigned. For more information on changing badge numbers, see the Changing Badge Numbers section later in this chapter.

**Pay Class**
Defines the current employee’s pay class assignment. Every active employee must be assigned to a valid pay class.

**WARNING:** Total hours per day cannot be calculated for employees who are not assigned to valid a pay class. All active employees tracked by EmpowerTime must be assigned to a pay class.

**Schedule Template**
Defines the current employee’s schedule template assignment. Once employees have been assigned to templates, the schedules contained in the templates can be copied over specific periods of time using the Employee Scheduler. EmpowerTime also copies
schedule templates over to the new pay period during the pay period closing process. Leave this field blank if templates are not used. For more details on scheduling, see Chapter 13—Schedules and Schedule Templates.

**Holiday Class**
Defines the current employee’s holiday class assignment. Holiday classes enable holiday hours to be automatically paid out in the form of pay records when employees meet holiday class qualifiers. For more details on holiday classes, see Chapter 9—Holiday Classes.

**TIP:** Right-click the Holiday Class field and select View Days Worked/Scheduled Flags from the pop-up menu to view the days an employee worked and was scheduled to work. This feature is useful when trying to determine whether or not employees meet any day before and day after qualifiers established in holiday class rules.

**Rate Override Class**
Defines the current employee’s rate override class assignment. Rate overrides activate special pay rates or premiums when certain qualifiers are met. For more details on rate overrides, see Chapter 7—Rate Override Classes.

**Error Class**
Defines the current employee’s error class assignment. Error classes define the exceptions that are tracked by EmpowerTime. For more details on error classes, see Chapter 8—Error Classes.

**Work Group**
Defines the current employee’s time off request workgroup assignment. Time-off-request workgroups define the rules around how an employee requests time off through WebEntry and how it is reviewed by supervisors.

**WebEntry Site**
Defines the current employee’s WebEntry site assignment. This field is used only in conjunction with the WebEntry data collection and reporting module.

**IVR Site**
Defines the options an employee will hear when punching in and out using and Integrated Voice Response (IVR) system to punch by phone.

**Personal ID**
Defines the current employee’s password or PIN number for accessing the WebEntry or WinPunch modules. This field is used only in conjunction with the WinPunch and WebEntry modules.

**External ID**
Defines an alternate ID number for the current employee. This field is used only when EmpowerTime is integrated with another business system that uses IDs that are longer than nine characters. This field is 50 characters long.

**On Reports**
Defines whether or not the current employee appears on EmpowerTime reports. This field should be unchecked for terminated employees.
Clock Number
Defines the number of the time clock at which the current employee must punch. Also
defines the time clock to which the current employee’s information is downloaded
during polling sessions. Employees assigned to a clock number are not permitted to
punch at other time clock terminals. This feature is used only for Verifone time clocks.
Clock numbers should be defined only if employees are restricted to punching at one
terminal. Otherwise, leave this field blank.

Clock Group
Defines a group of time clocks at which the current employee is allowed to punch. Also
defines the terminals to which the current employee’s information is downloaded
during polling sessions. This feature is used only for Accu-Time (ATS) and Recognition
Systems (RSI) terminals. Clock groups must be defined and assigned to employees in
order to perform validation at ATS time clocks or restrict employees to punching at
specific time clocks. If left blank for an employee and RSI time clocks are used, the
employee’s biometric template is downloaded to all time clocks during polling.

**TIP:** Clocks and clock groups must be set up in the appropriate time clock
communications module before employees can be assigned to them.

*Carry Hours
Displays the number of hours to be carried forward into the next pay period for an
employee. This field is only used for employees who are paid on a semi-monthly or
monthly basis. These pay periods often end in the middle of the week, and carry over
hours enable EmpowerTime
to calculate weekly overtime. EmpowerTime automatically calculates carry hours at the
end of a pay period.

*Days Worked
Displays the number of days an employee has worked. EmpowerTime automatically
updates this field as data is collected and processed, but a number of days may be
manually entered during the initial setup if necessary.

Misc. 1, 2, 3
Displays up to three user-defined fields that can store information not contained in
default EmpowerTime fields. These field labels are defined in Company Setup. The Misc
1 and 2 fields in the example earlier have been labeled Emergency Contact and Cell
Phone #. For more on these fields, see Chapter 3—Company Setup.

Clock Msg
Defines a personal message for the current employee to be displayed when he or she
punches at an Accu-Time time clock. Messages may be up to 20 characters long and
may be personalized for individual employees. Time clocks must be polled in order to
download or update messages. This feature works only in conjunction with Accu-Time
model 2000 and HandPunch model 4000 time clocks.

RSI Authority Level
Defines the current employee’s authority level at RSI HandPunch time clocks. The two
options in the menu are Employee and Supervisors. Individuals who are designated as
Supervisors are permitted to enroll other employees at HandPunch time clocks.

ATS Template Level
Defines the level of detail that is used when validating the current employee’s finger biometric at ATS Cyber and Global series time clocks. Employees using biometric clocks with Bioscrypt hardware finger readers should have an authority level assigned. **Very Low** is the least strict biometric and **Very High** is the most strict biometric. ATS clocks with Cogent hardware finger readers should be set to **Medium** for normal usage, since the finger reader will treat all sensitivity levels the same. The **Finger Not Required** and **Finger Always Accepted** options allow specific employees to be exempted from biometric validation and work with both types of finger readers.

### 12.6 Schedule Screen

The Schedule screen displays an employee’s schedule. Although schedules can be created and adjusted on this screen, scheduling is applied and edited in the Employee Scheduler. Unlike the Schedule screen, the Employee Scheduler includes tools for copying schedule templates, creating schedules in a spreadsheet format, and creating schedules for multiple employees at once. The Schedule screen displays any schedules created in the Employee Scheduler and is most commonly used as a reference.

![Employee Schedule Screen](image)

Figure 94: Employee Schedule Screen

Click the **Add** button to create a new scheduled day, or highlight an existing day of schedule and click the **Edit** button to make changes. Both the **Add** and **Edit** buttons activate the Employee Scheduler window.
The only fields that are required to create a day of schedule are **Date**, **Start Time**, and **End Time**. **Lunch Start** is an optional field that can be used to ensure automatic lunches are deducted from a specific segment of a workday. All other fields in this window are automatically populated with an employee’s default assignments. The **Pay Type**, **Pay Class**, **Job**, and organization level fields should be left at the default settings unless an employee is scheduled to work in codes other than his or her home assignments.

To create a split shift schedule for an employee, simply repeat the steps described above to enter two schedules for the same day. Split shifts cannot overlap, so be sure to enter start and stop times for split shifts appropriately.

**REMINDER:** The Employee Scheduler and scheduling procedures are described more thoroughly in Chapter 13—Schedules and Schedule Templates.

### 12.7 Secondary Job Screen

The Secondary Job screen contains an optional feature used to define one or more temporary jobs that activate different pay rates for an employee. Many businesses, such as restaurants, have employees who perform more than one job and receive different pay rates depending on the job. The Secondary Job screen defines these additional jobs so that new pay rates are applied to hourly segments whenever employees enter job transfer punches. An unlimited number of secondary jobs and pay rates can be defined.
on the Secondary Job screen, and each secondary job can be assigned an expiration date if necessary.

![Employee Secondary Job Screen](image)

**Figure 96: Employee Secondary Job Screen**

An employee should be assigned a primary job class and pay rate on the Main screen of the Employee section even if secondary jobs are worked as often as primary jobs. EmpowerTime assumes an employee is working his or her standard job at the standard pay rate unless a job transfer punch is recorded. The pay rate defined for a secondary job overrides an employee’s standard pay rate only when a job transfer punch is recorded or entered into the employee's timecard.

**TIP:** Secondary jobs do not need to be defined to allow employees to enter job transfer punches. Job transfer punches can be used for labor reporting whether or not they activate different pay rates.

Click the **Add** button to create a new secondary job, or highlight a secondary job and click the **Edit** button to make changes. Both the **Add** and **Edit** buttons activate the Edit Secondary Jobs window.

![Secondary Job Configuration](image)

**Figure 97: Secondary Job Configuration**
To define a secondary job, enter an **Effective Date** and, if applicable, an **Expire Date**. Expiration dates are optional, but an effective date must be entered for the secondary job to activate. If an employee works a secondary job prior to the Effective Date or after an Expire Date, the employee will not receive the different rate of pay.

Next, define the Job code for the new secondary job record. Both job codes and descriptions are defined in the Code Tables notebook under **Rules Setup**. Finally, if the secondary job activates a rate of pay different than the employee’s standard rate, define the new rate in the **Pay Rate** field. Be sure to save the changes before closing the Edit Secondary Jobs window.

**TIP:** Secondary jobs are normally activated by job transfer punches, but they can also be activated by other punch types or as a result of timecard editing. For example, a MAX transfer punch that includes a secondary job code could activate a secondary job pay rate. Similarly, an EmpowerTime user could change the job code associated with an employee’s punch, thereby activating a secondary job pay rate.

**REMINDER:** If employees receive premiums or different rates of pay based on more detailed criteria than just job codes, a rate override class must be used to activate the special pay or premium. For more details on rate overrides, see Chapter 7—Rate Override Classes.
12.8 Timecard Screen

The Timecard screen provides a user interface for viewing, editing, and approving the punches employees enter throughout each pay period. The Timecard screen also displays any pay records entered for that employee. The methods for reviewing, correcting, and approving punch transactions, as well as the methods for adding and correcting pay records, are described in Chapter 14—Timecards, Pay Records, and Approvals.

Figure 98: Employee Timecard Screen
12.9 Notes Screen

The Notes screen provides a user interface for recording notes about employees. Supervisors commonly use this screen to record attendance infractions and leave notes for each other about edits that have been made to employee records. Text entered on the Notes screen is never archived in the Historian or automatically deleted. Old text must be manually deleted.

![Employee Notes Screen](image)

Figure 99: Employee Notes Screen
12.10 Attendance Screen

The Attendance screen displays the attendance plans in which the current employee is enrolled and the benefit hours balance available in each plan. Employees may be enrolled in multiple attendance plans, each of which covers different pay types (e.g., Plan 1 covers vacation leave, while Plan 1 covers sick leave). When a pay record covered by a plan is entered for an employee, the amount of time used by the pay record is automatically deducted from the appropriate attendance bank. In addition, the transaction is recorded in the middle section of the Attendance screen for future reference. For more details on setting up and using attendance plans, see Chapter 10—Attendance Plans. The bottom section of the screen displays pending time off requests for that employee.

![Employee Attendance Screen](image)

Figure 100: Employee Attendance Screen

12.11 Changing Employee IDs

To change an employee's ID, click on the Processes drop-down menu at the top of the screen and select Change Employee ID. When changing an employee number, EmpowerTime displays the number being changed and prompts for the new employee ID number.
WARNING: Do not change employee numbers without also making the same changes in other applicable business systems such as payroll and human resources. Changing employee numbers in one program without doing so in others may halt the transfer of information between the programs, resulting in incorrect employee data and or incorrect payroll totals.

12.12 Changing Badge Numbers

To change an employee's badge number, click on the Processes drop-down menu at the top of the screen and select Change Badge Number. An employee's badge number may need to be changed if his or her badge is lost or damaged. Badge numbers are often reassigned when employees quit or are terminated.

REMINDER: To reissue a badge number to a different employee, first use the Clear Badge function to remove the badge number from the employee's record. Next, use the Change Badge Number feature to reassign the badge number to a different employee. Each active employee must have a unique badge number in order to record punches at a time clock or through WinPunch or WebEntry.

12.13 Mass Updates

The mass update utility provides a fast way to change or populate a field in the Employee Setup section for either all employees or a group of employees in a company.
For example, a mass update could be used to assign a group of employees to a new job code or holiday class code without actually touching each employee record. Mass updates are extremely useful when setting up employees or making changes to groups of employees, as the amount of manual entry required to make the changes or entries can be greatly minimized.

Two different mass update utilities are available in EmpowerTime—one in the Processes drop-down menu located above the Employee Setup notebook and one in the Utilities drop-down menu. The mass update utility located in the Processes menu may be used only to modify fields in the employee table, while the mass update utility located in the Utilities menu may be used to modify fields in any EmpowerTime table. Both mass update utilities are described in Chapter 19—System Utilities.

**WARNING:** Be sure to ask your EmpowerTime or network administrator to make an external backup of the EmpowerTime directory before making changes with the mass update feature. There is no undo feature that can be used to reverse inadvertent or incorrect changes.

### 12.14 Mass Add Punch

The Mass Add Punch utility provides a fast way to add a punch for a group of employees in a company. This feature is extremely useful when a power outage temporarily disables time clocks, preventing employees from punching in or out. Rather than adding the missed punches to each employee’s timecard, the Mass Add Punch utility can be used to add the punches with a few easy mouse clicks.

![Mass Add Punch](image)
To mass add a punch, click on the **Processes** drop-down menu at the top of the screen and select **Mass Add Punch**. The Mass Add Punch window, shown on the previous page, defines the type of punch to be added, the time stamp for the punch, and the employees' timecards to which the punch will be added. In addition, the labor detail codes associated with the punch (e.g., department, shift, and job codes) may also be defined. Explanations of the fields in this window are provided below.

**Set Filter**
Defines the employees whose timecards will be updated with the new punch. By default, the mass add punch utility updates all timecards in the Employee Setup notebook unless a filter is established. For more information on setting up filters, see Chapter 19—System Utilities.

**Punch Type**
Defines the type of punch to be added. Any kind of punch can be added with this utility.

**Punch Time**
Defines the time of the punch to be added.

**Punch Date**
Defines the date of the punch to be added.

**Disable Auto Lunch Deduct**
Defines whether or not the automatic lunch deduction feature should be disabled for the selected employees on the selected day. This feature applies only when adding an In For Day punch, as In For Day punches always define the detail for the rest of a workday. In addition, automatic lunches can only be disabled for employees who are assigned to a pay class that is configured to automatically deduct lunches.

**Override Detail**
Defines the labor detail codes to be associated with the new punch. By default, punches added with the Mass Add Punch feature are assigned detail codes based on employees' schedules and home assignments. Leave the fields under this section blank if the labor details should be taken from the default sources.

**EXAMPLE:** Due to a power outage that disabled the time clocks on Saturday, management needs to add punches for all employees who worked that day. A filter is established so that the punch is added only to those employees who worked on Saturday. Everyone who worked on Saturday worked on job 100 the entire day. Rather than adding both an In For Day punch and a Job Transfer punch to the selected employees' timecards, an In For Day punch is added with job code 100 defined in the **Override Detail** section of the Mass Add Punch window. This job code overrides the selected employees' default job assignments, indicating that the entire group worked that job from the beginning of the day.

Once all options have been configured, click **Save**. EmpowerTime will ask for a confirmation; click **Yes** to run the mass update. Be sure to check that the desired punch has been correctly applied to all selected employee timecards.

**REMINDER:** Labor detail codes are associated only with in-for-the-day and transfer punches.
WARNING: Ask the EmpowerTime or network administrator to make an external backup of the EmpowerTime directory before making changes with the Mass Add Punch feature. There is no undo feature that can be used to reverse incorrect changes.

12.15 Mass Add Pay Records

The Mass Add Pay Records feature provides a fast way to add a pay record for a group of employees in a company. This feature is extremely useful if vacation or holiday pay records need to be applied to multiple employee records at once, as it minimizes the amount of manual entry required. This feature is also frequently used during daylight saving time adjustments.

To mass add a pay record, click on the Processes drop-down menu at the top of the screen and select Mass Add Pay Records. The Mass Add Pay Records window defines the type of pay record to be added, the date of the pay record, the number of hours, and the employees for which the record will be added. In addition, the labor detail records associated with the pay record (e.g., department, shift, and job codes) may also be defined. The fields in this window are explained below.

![Mass Add Pay Records Window](image)

**Set Filter**

Defines the employees whose records will be updated with the new pay record. By default, the mass add pay records utility updates all records in the Employee Setup notebook unless a filter is established. For more information on setting up filters, see Chapter 19—System Utilities.
Date
Defines the date of the pay record to be added.

Pay Type
Defines the pay type of the pay record to be added.

Hours/Dollars
Defines the number of hours or dollars to be paid to the selected employees with the pay record. In order to pay dollar amounts with a pay record, the selected pay type must be set up as a dollars pay type.

Reason
Defines the absence reason code to be associated with the pay record. Absence reason codes must first be defined in the Code Tables notebook.

Job, Shift, Organization Levels
Defines the labor detail codes to be associated with the pay records. By default, pay records created with this utility are assigned detail records based on employees’ home assignments. Leave the fields under this section blank if the labor details should be taken from the default sources.

EXAMPLE: Management is giving employees an extra day of vacation for meeting a work quota on time. All employees will be given the same day off and management wants to charge the hours to department 500, even though most of the employees who earned the extra day of vacation are not assigned to that department. A pay record is added to the qualifying employees’ records using the mass add pay record utility. Department 500 is selected along with the number of hours, the date, and the vacation pay type, ensuring that the pay record overrides employees’ home department assignments for the vacation hours.

Once all options have been configured, click Save. EmpowerTime will ask for a confirmation; click Yes to run the mass update. Be sure to check that the desired pay record has been correctly applied to all selected employee records.

WARNING: Be sure to ask the EmpowerTime or network administrator to make an external backup of the EmpowerTime directory before making changes with the Mass Add Pay Records feature. There is no undo feature that can be used to reverse incorrect changes.
Creating Employee Templates

This feature allows supervisors and organizers to create employee templates to use when creating employees. For example, an organizer can save a lot of manual adjustments to employee records by automatically assigning any new employees they create to have the same settings with the Duplicate Employee option in the Processes menu.

![Processes Menu](image)

Figure 105: Processes Menu
CHAPTER 13—CHAPTER 13—
SCHEDULES AND SCHEDULE TEMPLATES

13.1 Overview

EmpowerTime™ includes several utilities for building and maintaining employees’ schedules with a minimal amount of manual data entry. Although EmpowerTime can collect punches and calculate hours for non-scheduled employees, scheduling facilitates a number of important benefits including increased exception tracking. Without schedules, EmpowerTime has no way of determining when employees arrive for work late, leave work early, or are absent. Schedules are also required in order to use schedule rounding rules.

Some employees may be scheduled in EmpowerTime while others are not scheduled, and the employees who are scheduled may be scheduled through different procedures. For example, some employees’ schedules may be created by copying schedule templates, while other employees’ schedules are created by entering start and stop times by hand. The different methods of scheduling employees are summarized below.

13.2 Scheduling Methods

The easiest way to schedule employees in EmpowerTime involves creating schedule templates, assigning employees to home templates, and copying the templates over specific calendar weeks using the Employee Scheduler. This method of scheduling is ideal for employees who generally work the same schedules week to week because little or no maintenance is required once the schedules have been set up.

Another way to create schedules for employees is to enter start and stop times by hand. Although this method is more time consuming than copying schedule templates, it is sometimes the only solution for employees who frequently change schedules. Schedules can be entered using either the Employee Scheduler or the Schedule screen in the Employee section, but the Employee Scheduler includes tools for copying previous days and weeks of schedule in order to expedite the process.

Flex scheduling is designed for employees who might work one of several possible schedules on any given day. This method of scheduling involves assigning employees to multiple schedule templates. Once the templates have been copied over specific calendar weeks using the Employee Scheduler, EmpowerTime picks the best schedule for an employee each day based on the closest match to his or her In For Day punch. Flex scheduling works well for employees who work rotating schedules.

Split-shift scheduling involves creating multiple shifts for an employee in a single workday. Split-shift schedules can be created by manually entering start and stop times, copying multiple shift templates, or a combination of the two methods. However,
the Employee Scheduler must be set to Multi-Schedule Mode in order to view the multiple shifts on screen. Scheduling is a complex topic, so it is recommended that first-time users read this entire chapter before creating schedules or schedule templates.

13.3 Schedule Templates and Template Overrides

Schedule templates define start and stop times on specific days for one or more weeks, and the schedules within a template are usually the same week to week. Schedule templates usually cover an entire pay period plus one additional week. In other words, a schedule template created for a group of employees who are paid biweekly is typically three weeks long. This additional week ensures that employees have a week of “buffer” schedule that can be used until the pay period is closed in EmpowerTime, rolling the schedules forward into the new pay period.

Once templates have been created, employees are typically assigned to one or more “home” templates that reflect their standard work schedules. Next, the Employee Scheduler is used to copy assigned templates over a specific period of time, producing multiple weeks of schedules for all employees. Schedule templates do not have to be recopied unless the templates change or employees are reassigned to different templates, as the pay period closing process can automatically copy employees’ templates into the new pay period.

Creating Schedule Templates

The Schedule Templates screen can be opened by clicking on Templates from the Employees drop-down menu. The Schedule Templates screen contains a listing of templates identified by template code and description. To create a new schedule template, click the Add button along the bottom side of the screen. Adding a new template will open the Schedule Template Details window. Existing templates can be modified using the Schedule Template Details window by clicking the Edit button.
Schedule Template Details

All schedule templates must have a template code and description. Schedule template codes may be up to ten characters long and may include letters, numbers, symbols, and spaces. Enter a brief description of the schedule template in the Description field.

Next, enter start and stop times on specific days of the week as shown in the figure below. Click on the cell in the Start column of the first day to be scheduled and enter the start time. Press the Enter key on your keyboard to move the cursor to the next cell and enter a stop time. Total weekly hours (excluding lunch breaks) are automatically calculated in the Hours column to the right as start and stop times are added.
NOTES

TIP: Lunch deductions are not included in the total scheduled hours displayed in the Hours column because schedule templates can be assigned to employees who are assigned to different pay classes. For example, one employee may be assigned to a pay class set up to automatically deduct half an hour for lunch each day, while another employee working the same schedule has an hour deducted.

Once the start and stop time for the first day have both been entered, press Enter again. As shown in the figure above, EmpowerTime prompts with the option to copy the start and stop times to the following four days. To create five concurrent days of schedule with the same start and stop times, click the Yes button.

Individual days of schedule can also be copied within the same week using the Copy Day button. To copy the start and stop times from one day to the next, highlight the day you wish to copy and click Copy Day. If you accidentally copy start and stop times to days that should be unscheduled, simply delete the unwanted start and stop times.

After the first week of a template has been established, additional weeks can be quickly created using the Copy Week button. Highlight one of the top two rows and click the Copy Week button to populate the following week with the same start and stop times on the same days.

Once all necessary start and stop times have been defined for the appropriate number of weeks, the template is ready for use. Continue creating templates until a separate schedule template represents each standard shift.

Schedule Template Overrides

Schedule templates contain an optional feature called template overrides that can change the default labor detail codes to which employees’ hours are assigned on...
specific scheduled days. For example, overrides can be used to automatically assign employees’ hours to specific job or organization level codes on certain days. Overrides can also be used to change the default pay classes and pay types to which employees’ hours would normally be assigned. Using overrides, temporary changes in labor detail codes can be scheduled in advance. In absence of schedule overrides, hours are assigned the default labor detail codes assigned to each employee in the Employee Setup notebook.

**EXAMPLE:** On Fridays all employees work in the shipping department to help fill orders taken during the week. Rather than asking all employees from other departments to enter department transfer punches on Friday morning, the schedule overrides in all schedule templates are changed to reflect the shipping department code on Friday. As a result, all employees’ hours on Friday are automatically assigned the shipping department code. Without the schedule overrides, employees’ hours would be charged to the default departments defined in each employee’s record.

![Figure 108: Schedule Template Overrides](image)

To display the schedule overrides associated with a template, click on the plus sign on the left of the week to be edited. A schedule template grid, as shown in the preceding figure, displays the fields where overrides can be applied. To apply an override in any of these fields, click in the cell you wish to edit and select the appropriate override from the drop-down menu or enter the updated information directly into the cell.

Schedule overrides can be adjusted only on scheduled days. Explanations of the fields in this window are provided below.
Absent Check
Defines whether or not the “absent” exception is tracked for a scheduled day. Yes, the default selection, indicates that an absent exception should be reported if employees working the schedule have no punches for the day.

TIP: If employees occasionally work weekends and schedule rounding rules are used, employees must be scheduled for all weekends in order to achieve the correct rounding on worked weekends. To suppress absent exceptions when employees do not work weekends, set this field to No for all scheduled weekends.

Pay Class
Defines the pay class code associated with the scheduled day. The default selection for this field, Default, indicates that the pay class defined in an employee’s setup will be associated with his or her hours on the scheduled day.

Job
Defines the job code associated with the scheduled day. The default selection for this field, Default, indicates that the job code defined in an employee’s setup will be associated with his or her hours on the scheduled day.

Organization Levels
Defines the organization level codes to be associated with employees’ hours on scheduled days. The default selection for these fields, Default, indicates that the organization codes defined in an employee’s setup will be associated with his or her hours on the scheduled day. The number of columns is equal to the number of organization levels defined in the Company Setup notebook.

Lunch Start
Defines the time at which lunch break begins on a scheduled day. This field is blank by default.

EXAMPLE: Employees enter department transfer punches throughout workdays, and all pay classes are set up to automatically deduct lunch breaks. By default, EmpowerTime deducts lunch minutes from the end of each workday unless lunches are scheduled, and this results in inaccurate labor reports. To correct this problem, the overrides for each schedule template are modified so that lunch breaks are scheduled to begin at noon each day. Once the templates are recopied in using the Employee Scheduler, the new schedule overrides ensure that automatic lunches are deducted from the correct segments of work each day.

Lunch Mins
Defines the number of lunch minutes to be automatically deducted on a scheduled day. The default setting for this field, Default, indicates that the number of lunch minutes deducted is equal to the number of lunch minutes defined on the Lunch/Break tab in an employee’s pay class.

TIP: This option applies only to automatic lunch deductions and does not affect days on which employees punch for lunches. Keep in mind that some employees assigned to a template may be assigned to different pay classes in which different numbers of lunch minutes are defined.
Pay Type
Defines the pay type associated with employees’ hours on a scheduled day. The default selection for this field, Default, indicates that the regular pay type (as defined in an employee’s pay class) will be associated with an employee’s hours unless pay rules change the hours to another pay type such as overtime.

Shift
Defines the shift code to be used for a scheduled day. When DE is assigned, the employee’s shift code is determined by shift premium rules or the employee’s home shift assignment.

Type
Defines the type of scheduling to be used for a scheduled day. Scheduled indicates a standard scheduled day. Interval indicates that interval rounding rules are to be used for the day.

**WARNING:** Schedule template overrides affect all employees assigned to a template. Overrides can also be changed person-by-person in the Employee Scheduler so that other employees are unaffected.

### 13.4 Assigning Employees to Templates

Once schedule templates have been created for standard work schedules, all applicable employees should be assigned to home schedule templates. Depending on the environment, some employees may be assigned to a single schedule template (for schedules that remain the same week to week) while other employees may be assigned to multiple templates (for flex or rotating schedules). This section describes the process of assigning employees to schedule templates in both situations. Employees are assigned to schedule templates on the Time and Attendance screen in the Employee section.

**REMINDER:** Employees who are not scheduled in EmpowerTime or whose schedules are keyed into the system do not need to be assigned to schedule templates.

**Fixed Schedules**

Employees who work fixed schedules that do not change week to week should be assigned to only one home schedule template. To assign an employee to a single schedule template, go to the Time Attendance screen in the Employee Setup notebook. Click the **Schedule Template** drop-down menu to view a list of all schedule templates set up in the current company. Select the appropriate schedule template for the employee and save the changes. Repeat this process for all employees who work fixed schedules, or use a mass update to assign a group of employees to the same schedule template.
Once an employee is assigned to the appropriate schedule template, that template must be copied over the current pay period using the Employee Scheduler as described later in this chapter. At the end of the pay period, the pay period closing process will automatically copy forward the employee’s schedule template to the new pay period. As long as the template does not change and the employee does not change schedules, his or her schedule will maintain itself through every subsequent pay period.

**Flex Schedules and Rotating Schedules**

Employees who work flex schedules or rotating schedules should be assigned to two or more schedule templates, depending on the number of possible schedules that might be worked on any given day. However, the Multiple Schedule Templates feature must be enabled before employees can be assigned to multiple templates. To enable this feature, open the System Options 2 screen in the Company Setup sub-menu of the Rules Setup drop-down. Locate the Multiple Schedule Templates setting and check the box. Save the changes and close the Company Setup screen.

Next, open the Employee Setup notebook, locate the appropriate employee, and go the Time Attendance screen. Note that the Schedule Template drop-down menu has been replaced with a browse button. Click the browse button and use the Select Schedule Templates window, shown in the figure on the next page, to assign the employee to every schedule template that he or she might work. The left pane displays all schedule templates set up in the current company, and the right pane displays all templates to which the current employee is assigned. Double-click a template listed in the left pane or use the buttons in the center of the window to move it to the right pane.

When all applicable schedule templates are listed in the right pane of the Schedule Templates window, use the Up and Down buttons along the right side of the window to order the selected templates. The most commonly worked or standard schedule template should be listed at the top, but the other schedule templates may be listed in any order. The top-most schedule template is the only template that is displayed on screen after the Employee Scheduler copies the templates, but all other templates to which an employee is assigned are recorded in the employee’s schedule.

Once an employee is assigned to the appropriate schedule templates, those templates must be copied over the current pay period using the Employee Scheduler as described later in this chapter. At the end of the pay period, the pay period closing process automatically copies forward all schedule templates to the new pay period. As long as the templates do not change and the employee does not change template assignments, his or her schedule will maintain itself through every subsequent pay period.
Whenever the employee records punches on a day that is scheduled in one or more templates, EmpowerTime selects the schedule that best matches the day based on the In For Day punch time. However, if the schedule selected for a day is not the schedule that is listed at the top of the right pane in the Schedule Templates window, EmpowerTime will not change the employee’s schedule (as viewed in the Employee Scheduler or the Employee Schedule Report) to display the schedule used for the day.

13.5 Using the Employee Scheduler

The Employee Scheduler includes utilities for copying schedule templates over specific calendar dates, copying previous days or weeks of schedule, and entering schedules by hand. To access the Employee Scheduler, click Scheduler under the Employees drop-down menu.
The Employee Scheduler displays employees’ actual work schedules, so when the Employee Scheduler is opened for the first time, no employees are scheduled. If employees have been assigned to schedule templates, those templates must be copied into the Employee Scheduler in order to produce schedules.

**Selecting Dates**

By default, the Employee Scheduler displays the current (oldest active) pay period dates at the top of the screen. To enter or edit schedules for a different week, click the date drop-down along in the top-left corner of the Employee Scheduler window. In the pop-up calendar, click the first day of the desired week. To select a date in a different month or year, use the dropdown menus or the navigator buttons provided in the Select Start Date window.

**TIP:** Schedule templates are usually at least two or three weeks long. When a template covering multiple weeks is copied over the Employee Scheduler calendar, the first week of the template is always copied into the currently displayed week. Any additional weeks of schedule are then copied into dates following the week currently displayed in the Employee Scheduler.

**Mass Schedule Update**

The **Mass Schedule Update** feature found on top of the scheduler can be used to add start and stop times to specific days of the week for all employees currently displayed in the scheduler.

![Figure 112: Mass Schedule Update](image)

Enter a stop and start time in the fields associated with the desired day of the week to change that day’s schedule for all displayed employees. Entering a start or stop time by itself will only change the scheduled start or stop time for that day.

**Copying Schedules**

All copy options available in the Employee Scheduler are located in the **Processes** drop-down menu. The most commonly used features in the **Options** menu are **Copy Template** and **Copy Templates For All Employees**. All of the functions available in the **Processes** menu are described below.

**Copy Day**

Copies the start and stop times of the highlighted day and pastes the schedule into the following day. This feature only changes the highlighted employee’s schedule.
Copy Employee’s Schedule To Different Week
Copies the currently highlighted employee’s schedule to a different week. When selected, a pop-up calendar prompts for the start date of the week to which the highlighted week of schedule should be copied.

Copy all Employees’ Schedules To Different Week
Copies the currently displayed week of schedules to a different week for all employees currently displayed in the Employee Scheduler. A pop-up calendar prompts for the start date of the week to which the schedules should be copied.

**TIP:** The Copy Employee’s Schedule To Different Week and Copy All Employee’s Schedules to Different Week features can be extremely useful if schedules are manually entered without the use of templates. Use these features to copy and paste schedules when employees will be working the same schedules in concurrent weeks but are not assigned to schedule templates.

Copy Template
Copies a schedule template over the currently highlighted employee’s schedule. When activated, a pop-up menu prompts for the schedule template to be copied. This feature provides a fast way to copy a template that differs from an employee’s standard template. Copying a template with this feature does not assign the employee to the template or change the employee’s assignment.

**TIP:** If an employee is already scheduled for one or more days in a week and a user attempts to copy a template over that week, EmpowerTime prompts the user with the option to append or replace the schedule with the new schedule.

Copy Templates For All Employees
Copies all employees’ assigned templates into the schedule starting with the week currently displayed. This feature only affects employees who are currently displayed in the Employee Scheduler and assigned to one or more schedule templates.

**TIP:** The fastest way to schedule employees is to create schedule templates, assign employees to one or more home templates, and use the Copy Templates For All Employees feature. Although this method of scheduling requires a significant amount of initial setup, schedules for future pay periods are created in with little to no user intervention. The pay period closing process activates the Copy Templates For All Employees process, so schedules automatically roll forward at the end of each payroll cycle for all employees assigned to schedule templates.

Delete Schedule
When this option is selected, the scheduler looks at the highlighted start or stop time and deletes both highlighted record and its pair.

Delete Day
Deletes the start and stop times of the day highlighted by a yellow box. This feature only changes the schedule corresponding to the highlighted employee.
Delete Employee’s Scheduled Week
Deletes the currently displayed week of schedule for the highlighted employee. This feature only deletes the schedule corresponding to the highlighted employee and currently displayed week.

Delete all Employees’ Scheduled Week
Deletes the currently displayed week of schedules for all employees currently displayed in the Employee Scheduler. This feature only deletes employees’ schedules from the currently displayed week.

Creating Schedules Manually

If employees do not work standard schedules that can easily be represented by schedule templates, scheduled start and stop times can be keyed manually into the Employee Scheduler. Both Employee Scheduler modes may be used to manually enter start and stop times.

To manually key an employee’s schedule, select the appropriate employee and week and enter the start and stop times as shown in the figure below. After start and stop times have been entered for one day, EmpowerTime prompts with the option to copy the start and stop times to the following four days. The Copy Day and Copy Employee’s Schedule To Different Week functions can also help minimize data entry.

Manually entered schedules typically require maintenance each week. Although the closing process rolls forward schedules created for employees who are not assigned to schedule templates, employees’ schedules may still need to be updated each week. Future schedules created before the closing process is activated are not overwritten during the closing process.

The Schedule screen in the Employee Setup notebook provides an alternative method of creating schedules day-by-day. Although the Schedule screen does not provide a spreadsheet-style interface for entering schedules, individual days of schedule can be created, edited, or deleted. All schedules created or copied using the Employee Scheduler may be viewed on the Schedule screen at any time and vice versa. For more information on using the Schedule screen, see Chapter 12—Employee Setup.

TIP: If employees’ schedules are keyed into the Employee Scheduler, those same schedules can be copied into the next pay period when the pay period closing process is run. If the same employees are also assigned to home schedule templates, however, the closing process copies the assigned templates into the new pay period instead of the keyed schedules. All employees whose schedules must be keyed every week should not be assigned to schedule templates.
Scheduling Split Shifts

Scheduling split shifts involves creating multiple shifts for an employee within a single workday. Split-shift schedules can be created by keying start and stop times, copying schedule templates, or a combination of the two methods. However, split shifts cannot overlap each other. The Employee Scheduler must be set to multi-schedule mode in order to view the multiple shifts.

**WARNING:** EmpowerTime will not function correctly if an employee’s schedule includes multiple shifts that cross each other. Always make sure that shift start and stop times do not overlap.

To create a split-shift schedule, select the appropriate employee and week and enter start and stop times for one or more days via manual entry or through the Copy Template option. To add a second set of start and stop times, right-click and select Add Multi Schedule or press F4. You can then use the copy template function or manually enter the additional set of start and stop times.

![Add Multi Schedule](image)

Filtering Employees in the Scheduler

By default, the scheduler will display all employees the EmpowerTime user has access to view. If an employee would like to filter the number of employees they view on the screen, they can use the filter drop-down menus at the top of all of the columns selected to be displayed in the system settings. The scheduler can be filtered based on employee number, last name, first name and detail information. For more information on how to use column filters, see Chapter 2—Navigating the System.

Schedule Overrides

Like schedule templates, schedules copied or keyed into the Employee Scheduler contain a feature called schedule overrides that can be used to change the default labor detail codes to which employees’ hours are assigned on specific scheduled days. For example, overrides can be used to automatically assign employees’ hours to specific job or organization level codes on certain days. Overrides can also be used to change the default pay classes and pay types to which employees’ hours would normally be assigned. Using overrides, temporary changes in labor detail codes can be scheduled in advance. In absence of schedule overrides, hours are assigned the default detail codes assigned to each employee in the Employee Setup notebook.

The overrides associated with schedules in the Employee Scheduler are typically the result of schedule templates that were copied into the calendar. When a template is
copied using the Employee Scheduler, the overrides contained in that template are copied into the Employee Scheduler along with all start and stop times.

To adjust the schedule overrides for an employee’s schedule, click the plus sign to the left of the desired employee’s schedule week to expand the list of available overrides. Adjust the schedule overrides as desired using the pull-down menus associated with each field. The overrides displayed can be selected in the Settings option of the Processes drop-down menu, described later in this chapter. For more information on adjusting employee’s schedule overrides, see the Schedule Template Overrides section earlier in this chapter.

Figure 115: Schedule Overrides

![Schedule Overrides]

**WARNING:** If a schedule template is copied for an employee after his or her overrides have been adjusted in the Employee Scheduler, the overrides in the template overwrite the overrides previously adjusted in the Scheduler.

### Schedule Display Settings

The Employee Scheduler includes configuration options that allow each EmpowerTime user to adjust the format and content of the information displayed on screen. Some of the customization options include daily hours and dollars totals, employee counts, and the labor detail codes defined in the overrides for scheduled days. Employee Scheduler settings are customizable per user ID, so each EmpowerTime user should be encouraged to configure the display settings as desired. To adjust the display settings, select **Settings** from the **Processes** drop-down menu. The settings available in the Employee Scheduler Settings window are described below.
Figure 116: Employee Scheduler Settings

Auto Copy First Day
Defines whether or not EmpowerTime prompts users with the option to copy the first day of schedule to the following four days. This option is presented only when the first day of an employee’s schedule is keyed.

Calculate Employee’s Total Hours/Dollars
Define whether or not total hours and dollars are calculated each employee. When enabled, both daily and weekly totals are provided. These options are available only when the Employee Scheduler is set to multi-schedule mode.

Show TORs
Enabling this feature will highlight days in the scheduler where an employee has submitted a time off request. The color codes associated with the status of the time off requests are defined in the Accepted, Declined, and Pending TOR Color fields.

Calculate Grand Total Hours/Dollars/Employees
Define whether or not grand total hours, dollars, and scheduled employee counts are calculated. When enabled, both daily and weekly totals are provided. When disabled, more room is available for displaying schedules.

Show Pay Records
Enabling this feature will highlight days in the scheduler where an employee has a pay record in the system. The color code in the scheduler associated with pay records is defined in the Pay Record Color field.
TOR and Pay Record Colors
Defines the color a cell will be highlighted in to indicate an accepted, declined, or pending time off request or a pay record that is different than the default assignment.

Grouping and Editable Columns
This defines the columns shown in the scheduler. By default, each employee row is identified only by employee number. Detail information can also be displayed in the scheduler here. Categories selected in the **Grouping Columns** section will be displayed along the left side of the schedule and can be used to sort the list of employees in different ways. Categories selected in the **Editable Columns** section will be displayed only when a week’s schedule has been expanded with the plus sign on the far left of the selected row. Use the arrow buttons in the center to select the fields to be displayed. Some options, like Job, are available in both sections, but can only be displayed in one at a time.

**REMINDER:** Projected dollar totals cannot be calculated unless pay rates are defined in EmpowerTime for all scheduled employees. Projected dollar totals do not include any pay premium or overtime situations that may occur.
CHAPTER 14—CHAPTER 14—
TIMECARDS, PAY RECORDS, AND APPROVALS

14.1 Overview

The majority of time users spend working in EmpowerTime™ involves reviewing and editing timecards, entering pay records, and approving total pay period hours. Timecard totals and pay records combine to produce the total hours and dollars EmpowerTime exports to payroll at the end of each pay period. The approvals process is optional but provides a way for supervisor-level users to indicate when they have finished reviewing and editing employees’ records for payroll.

Timecards display each employee’s In For Day, Out For Day, lunch, break, and transfer punches recorded in the current pay period. Timecards display both actual and rounded punch times as well as the labor detail codes (e.g. shift codes, department codes, etc.) associated with punches. Timecards are located on the Timecards screen in the Employee Setup notebook.

Pay records are hours or dollars transactions entered by an EmpowerTime user or automatically generated by the system. Pay records do not have start or stop times but rather are recorded as a total number of hours or dollars. Pay records are typically entered to account for days of sick leave, vacation, personal leave, tips, and bonuses. In addition, EmpowerTime can be configured to automatically generate pay records for qualifying employees on company recognized holidays. Pay records are located on the Pay Records screen in the Employee Setup notebook.

Approvals provide a way for supervisor-level users to mark employee records that have been reviewed and edited and are ready for payroll. Supervisors are typically responsible for approving employees’ hours, and payroll personnel are responsible for checking that all hours have been approved before exporting data to payroll. Approvals can help minimize payroll errors and improve the lines of communication between supervisors and payroll personnel. Approvals can be made either on the Timecards screen in the Employee section or through the Employee Approvals feature located in the General options under the Activities dropdown menu.

14.2 Timecards

The Timecards screen in the Employee Setup notebook displays punches and pay records that have not yet been archived in the Historian. The current employee's name and ID number are displayed near the top of the screen, and the navigation controls along the top of the screen can be used to scroll through employee records or to search for a specific employee record. Several action buttons are available above the timecard, and punches and pay records are displayed in the center of the screen. Weekly totals are displayed at the bottom of the screen.
The number of weeks of totals that are displayed at any one time depends on the pay frequency to which the current employee is assigned as well as the current date in relation to start of the current pay period.

**Figure 117: Employee Timecard Screen**

### Punch Color Definitions

The Timecards screen employs a punch color-coding scheme that identifies the status of each punch. The punch colors displayed on the Timecards screen are described below.

**Black**
Indicates that the punch is an original, unmodified transaction.

**Red**
Indicates that the punch is missing, meaning that the employee forgot to punch or the punch has not yet been posted to the employee’s timecard. Missing punches are displayed with double question marks (??) in the **Actual Time** column. A missing punch that is generated because an employee forgot to punch must be corrected before the end of the pay period.

**Green**
Indicates that an EmpowerTime user added, changed, or corrected the punch. Original punches that are altered in any way by a user are automatically changed from black to green.

Missing punches that are corrected by a user are automatically changed from red to green. Punches that are added by a user are automatically displayed in green.
Gold
Indicates that the punch is part of an approved pay period. Approved punches and pay records cannot be modified unless the approval flag is removed. Some users may not have permission to approve and unapprove employees’ records.

Light Blue
Indicates that the punch contains an invalid labor detail code (i.e. a code that has not been defined in the Code Tables section) that must be corrected. This typically occurs when employees enter transfer punches that are not validated at the time clock and the box next to the Reject Invalid Detail Transactions field in Company Setup 2 is unchecked. The rounded punch time and total hours for the day cannot be calculated until the invalid detail code is corrected using the Timecard Edit utility.

**EXAMPLE:** Employees transfer between jobs throughout each day, and hundreds of different job codes are defined in the Code Tables section in EmpowerTime. In order to save time clock memory, validation on transfer punches is disabled at the time clocks. Employees enter job codes by hand whenever they transfer, and invalid codes are occasionally entered by accident. The Reject Invalid Detail Transactions option is unchecked so that users don’t have to remember to check the Rejected Punches notebook for any transfer punches that were incorrectly entered.

Dark Blue
Indicates that the punch was automatically created by EmpowerTime. Dark blue punches usually appear for holiday records, but they can also be created by the system if the Auto Fill Punches feature is enabled in the employee’s pay class. The Auto Fill Punches feature can automatically create In For Day and Out For Day punches based on schedules or automatically fill in missing punch times. For more information on the Auto Fill Punches feature, see Chapter 6—Pay Classes.

System punches can be deleted from the Timecards screen. Deleting a record of this type will cause EmpowerTime to suppress the record of the punch. If a post is run after a system punch has been deleted, EmpowerTime will prompt the user to decide whether the punch should continue to be suppressed or not. In the example shown in the following figure, a holiday record had been deleted from the employee’s timecard. If the box remains unchecked, the holiday record will continue to be suppressed in the system and will not count toward the employee’s hour and holiday balances. If the box is checked, the record will be deleted from the system and then regenerated during the posting process. In other words, if the box is checked, the holiday record will reappear on the employee’s timecard and will once again count toward the hour and holiday balances.
WARNING: Be sure to check all applicable local, state, and union laws before enabling the Auto Fill Punches feature.

Punch Type Definitions

EmpowerTime accepts many different types of punches, but in most cases employees only enter a few specific types of punches. Depending on the configuration of EmpowerTime, the data collection devices or programs in use, and company policies, some punch types may never be used. All punch types are described below.

IND
In For Day. Indicates when an employee began a day of work.

INL
In From Lunch. Indicates when an employee returned from lunch.

INB
In From Break. Indicates when an employee returned from a break.

IDA
In For Day Again. Indicates when a second shift within a day began. This punch type is automatically generated when an employee punches In For Day more than once in the same day. EmpowerTime automatically changes the second In For Day (IND) punch to an IDA so that the different segments of work can be combined into one daily total.

OUTD
Out For Day. Indicates when an employee ended a day of work or a shift within a day.

OUTL
Out For Lunch. Indicates when an employee left for lunch.

OUTB
Out For Break. Indicates when an employee left for a break.
OUT
General out punch. EmpowerTime automatically changes punches to OUT when, based on the punching sequence, it cannot be determined whether the punch should be an OUTD, OUTL, or OUTB.

XFER
Organization level transfer punch. Indicates when an employee transferred into a new organization code. The level within which employees can transfer with this punch type is determined by the Map Clock Transfer To field on the System Options 1 screen in the Company Setup section.

JBX
Job transfer. Indicates when an employee transferred into a new job code.

SHX
Shift transfer. Indicates when an employee transferred into a new shift code. Shift transfer punches are automatically generated by EmpowerTime as a result of shift premium rules defined in an employee’s pay class.

PCX
Pay class transfer. Indicates when an employee transferred into a new pay class code.

MAX
Massive transfer punch. Indicates when an employee transferred into one or more new organization level codes. MAX punches allow employees to transfer between multiple organization level codes with a single punch. For example, one MAX punch could simultaneously transfer an employee into a new division, department, and location. Employees can end a segment of time started by a MAX punch by entering either an EMAX punch or another MAX punch.

EMAX
End massive transfer punch. Indicates when an employee completes a MAX transfer. This punch type ends a segment of time started by a MAX punch, and all following hours (until another transfer punch or an Out For Day punch is entered) are charged to the employee’s default labor code assignments.

CON
Concurrent transfer punch. Concurrent transfers allow employees to simultaneously work on multiple jobs.

ECON
End concurrent transfer punch.

LOVR
Lunch Override Punch. This punch type is used in conjunction with Phone Entry to override automatic lunch deductions.

**WARNING:** Concurrent transfers are part of an add-on EmpowerTime module. Contact Empower Technical Support for more information on concurrency.
Timecard Action Buttons

Several action buttons are provided near the top of the Timecards screen. The buttons in this toolbar are described below.

The **Punch** and **Edit** buttons provide access to the Timecard Edit window as shown in the following figure. The Timecard Edit window displays all detail associated with a punch including job, shift, pay type, and organization level codes. The Timecard Edit window can also be accessed from the Timecard screen by double-clicking any punch.

![Timecard Edit Screen](image)

Figure 118: Timecard Edit Screen

Missing punches can be corrected without opening the Timecard Edit window, so this feature is primarily used for advanced punch edits such as changing a punch type or the labor detail codes associated with a punch. The fields in the Timecard Edit window are described in the following box.

**Punch Type**
Displays the type of the punch currently displayed in the Timecard Edit window. Each punch must be assigned a valid punch type. A list of all punch types available in the drop-down menu is provided earlier in this chapter.
Punch Time
Displays the actual, unrounded time of the punch currently displayed.

Punch Date
Displays the date of the punch currently displayed.

Error/Exception
Displays the exception, if any, associated with the punch currently displayed. Exceptions are automatically generated as a combination of pay rules, schedules, and actual punch times.

Override Rounding
Unlocks the Rounded Time and Rounded Date fields for the punch currently displayed. If all applicable pay rules and schedules are set up correctly, this feature should rarely be used.

Rounded Time
Displays the rounded time of the punch currently displayed. If the Override Rounding box is checked, the rounded time of the punch can be adjusted.

Rounded Date
Displays the rounded date of the punch currently displayed. If the Override Rounding box is checked, the rounded date of the current punch can be adjusted.

EXAMPLE: An employee is assigned to a pay class that specifies that all early in punches should be rounded up to his scheduled start time. The employee is called in to work half an hour early one morning, and the rounding rules round his actual punch time up to his scheduled start time. To pay the employee for the work performed before his scheduled start time, the Override Rounding feature is used to set the rounded punch time back half an hour.

Disable Auto Lunch Deduct
Disables the automatic lunch deduction rule for the employee on the day currently displayed in the Timecard Edit window. To disable an automatic lunch deduction for a day, check this option on the corresponding In For Day punch.

Pay Date
Displays the payroll date to which the hours calculated from the current punch will be applied. Payroll dates cannot be modified in this field and can only be changed using the Override Rounding feature described above.

Override Detail
Displays all labor detail codes associated with the currently displayed punch. Labor detail is only displayed with In For Day and transfer punches. Click the Override Detail button to activate the Punch Detail window as shown in the following figure.
Figure 119: Punch Override Detail

**NOTE:** Fields that have been overridden will display in fuchsia, like the **Line Number** organization level above. This indicates that EmpowerTime will use the override code and not apply the employee’s default setting for that organization level during the posting process. The fields shown in your implementation of EmpowerTime will vary from the preceding screen depending on your rules configuration.

**Comment**

Allows users to enter a comment about the punch. Comments immediately become available from the drop-down menu so frequently used comments can be quickly selected. The comments will then display on the timecard.

**TIP:** The labor detail codes associated with In For Day punches can come from a number of sources. By default, punch detail is taken first from employees’ schedule overrides. If specific detail codes are not defined in schedule overrides, detail codes are then taken from employees’ assignments on the Main and Time Attendance tabs in the Employee Setup notebook. This default functionality can be adjusted using the **Pull Punch Detail From** feature located on the Miscellaneous screen in the Pay Class section.

**Hours**

The Hours button provides access to the Employee Pay Records Detail screen, which allows users to enter a pay record for a specific employee. Pay records are described in more detail later in this chapter.

**Delete**

Use this button to delete a selected punch from the timecard. Punches can also be deleted from the right-click menu or by pressing the F7 key on your keyboard. EmpowerTime will ask for verification before deleting the punch. This feature is not to be confused with the delete button in the navigation bar, which would delete the employee’s entire record. Records of active employees cannot be deleted.
Provides access to the Hours Break Out window as shown in the following figure. This feature displays the current employee’s hours by day as well as by any differences in pay type, pay class, and labor detail codes.

The Hours Break Out feature cannot be used to edit punches or hours in any way. The Hours Break Out simply provides an easy way to view the job, shift, pay type, pay class, and organization level codes associated with the current employee’s pay period hours.
Provides access to the Daily Activity window as shown in the figure below. This feature displays the total hours earned by the current employee for each day worked. In addition, both actual as well as rounded lunch and break deductions are displayed for each day.

The total hours per day displayed in the Hours column of the Daily Activity window are always adjusted for any lunch and break deductions. The Lunch Deduct and Break Deduct columns show the number of minutes that were actually deducted from daily totals. If an employee is missing a punch, total hours for that day are not displayed until the punch is corrected.

If an employee punches for a lunch, the Actual Lunch column displays the number of minutes he or she was punched out on lunch that day. The Lunch Deduct column displays the rounded lunch minutes that were deducted from his or her daily total. If an automatic lunch deduction occurs, the Actual Lunch column displays a zero while the Lunch Deduct column displays the number of minutes automatically deducted from the daily total.

EXAMPLE: An employee is assigned to pay class that is set up to automatically deduct 30 minutes for lunch every day. This employee never punches for lunches. In the Daily Activity window for this employee, the Actual Lunch column always displays a zero on days that were worked, while the Lunch Deduct column always displays 30 minutes.
If an employee punches for paid breaks, the **Actual Break** column displays the number of minutes he or she was punched out on breaks. The **Break Deduct** column displays the number of minutes (if any) actually deducted from his or her daily totals. Paid break minutes are not deducted unless an employee exceeds the allowed number of break minutes in any given day as defined in his or her pay class.

**EXAMPLE:** An employee is assigned to a pay class that allows two 15-minute breaks per eight-hour day. The pay class rules are set up so that break minutes are deducted from the daily total only if the employee exceeds the 30 minutes allotted per day. The employee takes one 13-minute break in the morning and one 18-minute break in the afternoon. In the Daily Activity window for this employee, the **Actual Break** column shows that 31 minutes of break time were taken during the day. The **Break Deduct** column shows that one minute was deducted from the daily total.

**Post**

Activates the posting process on the current employee’s record. This utility recalculates rounded punch times, daily totals, and exceptions on the current employee’s timecard but does not post any other employees’ timecards. Keep in mind that the master posting utility, located in the **General** section of the **Activities** drop-down menu, should be run on a daily basis in order to recalculate all employees’ records and to post newly polled punches (punches that have recently been downloaded from time clocks). The **Post** feature on the Timecards screen cannot post newly polled punches to employees’ timecards. The master posting utility is described more thoroughly in Chapter 19—System Utilities.
Provides access to the Exceptions window as shown in the figure below. This feature displays all exceptions in the current pay period for the current employee. Users with filtered user IDs can only view exceptions for those employees to which access has been granted.

The Exceptions window displays either all exceptions or only missing punches. To toggle between these modes, use the Missing Punches Only checkbox at the bottom of the screen. Additional filters may be established on the list of exceptions using the filter buttons at the top of each column.

The Exceptions window displays missing punches in red, and absences are displayed in either purple or black. An absence is displayed in black if it occurs on a day for which a pay record has been added for the employee (such as a pay record for sick leave or vacation). An absence is displayed in purple when a pay record for the day has not been entered. If the Track Absences With Pay Records option in the Company Setup notebook is set to Yes, an absent exception is suppressed if it occurs on a day for which a pay record has been added.

TIP: When correcting missing punches, use the Exceptions window to navigate between timecards containing missing punches. Simply double-click a missing punch record in the Exceptions window, and the Timecards screen will automatically scroll to the appropriate employee’s timecard. In addition, the cursor automatically places itself the Actual Time column of the selected missing punch record so that the correct time may be entered.
Provides access to the Timecard Configuration window as shown below. The number of fields and available options will vary depending on your specific EmpowerTime configuration. This feature allows users to customize the layout of the Timecard screen. Timecards may be customized per user ID, so each user should be encouraged configure the Timecards screen as desired.

![Timecard Configuration](image)

**Figure 123: Timecard Configuration**

The weekly totals displayed at the bottom of the Timecards screen may be toggled on and off using the **Totals** drop-down menu. Along with the default punch information displayed on the Timecards screen, ten additional fields of labor detail can be displayed per row. Using the **User Field** drop-down menus, select the labor detail levels to be displayed on the Timecards screen.

The timecard summary at the bottom of the screen expresses all of the hours worked by an employee according to pay type groups.

![Pay Type Groups](image)

**Figure 124: Pay Type Groups**

The pay types represented by each group can be viewed in the Pay Type Group setup. Pay Type Groups are described in detail in Chapter 5—Pay Types and Pay Type Groups.
14.3 Editing Timecards and Correcting Missing Punches

EmpowerTime users should edit timecards and correct missing punches on a daily basis to ensure that accurate data is available on reports throughout each pay period. Missing punches can be corrected using either the Missing Punch Edit utility or the Timecard screen in the Employee section. To add, delete, or edit punches that are not missing, the Timecard screen must be used. All methods of editing timecards and correcting missing punches are described below.

Correcting Missing Punches

Missing punches are critical errors that must be corrected before pay period data is exported to payroll. If there is missing a punch, EmpowerTime cannot calculate the day’s total hours. Missing punches are always displayed on the Timecards screen in red with double question marks (??) in the Actual Time column.

To correct a missing punch, click once on the question marks in the Actual Time cell associated with the punch. Once a cursor appears in the Actual Time cell, enter the correct time of the punch as shown in the figure above. Note that missing punch times cannot be entered into any columns on the Timecards screen other than the Actual Time column. Times displayed in the Rounded Time column are calculations based on actual punch times and the pay rules and schedules to which employees are assigned.

Repeat the process described above until all missing punches on the currently displayed timecard are corrected. Finally, click the Post button to recalculate rounded times and daily totals on the timecard.

Editing Punches

To change the time associated with a punch, click the time in the Actual Time cell. Once a cursor appears in the Actual Time cell, enter the new punch time. Note that punch times cannot be entered into any columns on the Timecards screen other than the Actual Time column. Times displayed in the Rounded Time column are calculations based on actual punch times and the pay rules and schedules to which employees are assigned.

Once a punch has been edited, click the Post button to recalculate rounded times and daily totals. Changes are not lost if the posting process is not run after editing a timecard, but reports may not reflect correct totals until the posting process has been run. Some punches may require more editing than simply modifying the actual time. For example, you may need to override a rounding rule on a punch, change the date of a punch, change the punch type, or adjust the job code into which an employee transferred. The Timecard Edit utility provides tools for making these kinds of advanced
punch edits. The Timecard Edit window may also be used to add or delete punches. To access the Timecard Edit window, double-click a punch or highlight a punch and click the **Edit** button.

**REMARK:** Depending on the configuration of user IDs, punch times may be displayed on the Timecards screen in standard (12-hour) or military (24-hour) format. Be sure to enter punch times accordingly.

![Timecard Edit Utility](image)

Only one punch at a time may be viewed and edited using the Timecard Edit utility. Use the arrow buttons to navigate between the punches in an employee’s timecard. Once the correct punch is displayed, use the appropriate options to modify the punch as necessary. All of the options available in the Timecard Edit window are described earlier in this chapter.

**REMARK:** Job, shift, pay type, pay class, and organization level codes are only displayed with In For Day and transfer punches. In and transfer punches determine the labor detail codes for all following hours (until an Out For Day or transfer punch is recorded), so detail records may only be viewed and edited on these punch types. Punch detail is never displayed in conjunction with an Out For Day punch.
Creating Punches

To create a new punch, click the Add button to open the Timecard Edit utility. Next, enter a punch type, date, and time. If necessary, use the Override Detail feature to define any applicable labor detail codes that differ from the codes to which the employee is assigned or scheduled to work. Finally, save the changes, close the Timecard Edit window, and click the Post button to recalculate rounded times and daily totals.

Deleting Punches

To delete a punch from an employee’s timecard, highlight the Actual Time cell corresponding to the punch and press the F7 button on your keyboard. Punches can also be deleted using the Delete button on the timecard screen or in the Timecard Edit window.

Missing Punch Edit Utility

The Missing Punch Edit utility provides an alternate method of identifying and correcting missing punches. Rather than displaying each employee’s complete timecard, the Missing Punch Edit utility only lists uncorrected missing punches. Like the Timecards screen, the Missing Punch Edit utility only permits users to correct missing punches for employees to which their user IDs permit access.

To access the Missing Punch Edit utility, click the Missing Punch Edit button in the General screen of the Activities section. As shown in the figure below, each missing punch is listed along with the employee’s name and the day, punch type, date, and the day’s schedule. Click the plus sign to the left of any missing punch to expand the missing punch details section. To correct the missing punch, enter the time in the time column.

![Figure 127: Missing Punch Edit Utility](image)

14.4 Pay Records

Pay Records are hours or dollars transactions entered by an EmpowerTime user or automatically generated by the system. Pay records do not have start or stop times but rather are recorded as a total number of hours or dollars. Pay records are typically entered to account for days of sick, vacation, personal leave, tips, and bonuses. In addition, EmpowerTime can be configured to automatically generate pay records for qualifying employees on company recognized holidays. To add or edit pay records, go to the Timecards screen of the Employees section.
TIP: The posting process should be run after correcting missing punches in order to ensure that rounded punch times and daily totals are recalculated.

Several action buttons are located in a toolbar along the top of the Timecard screen, and they are described in more detail earlier in this chapter. To add a pay record, click the **Hours** button. Pay records can be edited by double-clicking the desired pay record. The Employee Pay Records edit window is activated when adding or editing a pay record.
Use the buttons provided at the top of the Employee Pay Records edit window to add or delete pay records, save and cancel changes, and navigate between the pay records that have been entered for the current employee. All pay records must be assigned a valid date, number of hours or dollars, and pay type. Absence reasons codes are optional. The job, shift, pay class, and organization level fields are automatically populated with the codes assigned to the current employee on the Main and Time Attendance tabs. The default codes may be changed if a pay record needs to be charged to different codes. Descriptions of the fields in the Employee Pay Records edit window are provided below.

**Date**
Displays the date of the current pay record. By default, the current date is displayed when a new pay record is created.

**TIP:** Pay records can be entered in advance. If a pay record is entered for a date outside of the current pay period, EmpowerTime will not purge the pay record to the Historian when the closing process is run for the current pay period. The closing process only purges data from one pay period at a time. For more details on closing a pay period, see Chapter 17—Daily and End-of-Pay-Period Activities.

**Hours/Dollars**
Displays the number of hours or dollars to be paid out with the pay record.
TIP: Dollars pay records can only be entered using pay types that have been set up as dollars pay types. Likewise, hours pay records can only be entered using pay types that have been set up as hours pay types.

Pay Type
Displays the pay type assigned to the current pay record. Use the drop-down menu to select a pay type from the list of all pay types set up in the current company.

Absence Reason
Displays the absence reason code assigned to the current pay record. Absence reason codes are optional.

Job
Displays the job code associated with the current pay record. Use the drop-down menu to select a different job code if the pay record should be charged to a code other than the employee’s default.

Shift
Displays the shift code associated with the current pay record. Use the drop-down menu to select a different shift code if the pay record should be charged to a shift other than the employee’s default.

Pay Class
Displays the pay class associated with the current pay record. Use the drop-down menu to select a different pay class code if the pay record should be charged to a pay class other than the employee’s default.

Organization Levels
Displays the organization level codes associated with the current pay record. Use the dropdown menus to select different organization codes if the pay record should be charged to codes other than the employee’s defaults.

Comment
Allows users to enter a comment about a pay record in case more detail is needed. Once comments are created, they become available to select from the drop-down menu.

REMINDER: If an employee is assigned to one or more attendance plans, a pay record for benefit hours is accepted only if enough hours are available in the corresponding balance and the pay record meets all attendance criteria. For more information on setting up and using attendance plans, see Chapter 10—Attendance Plans.

14.5 Multilevel Review and Approvals
Approvals provide a way for employee and supervisor-level users to mark employee records that have been reviewed and edited and are ready for payroll. Supervisors are typically responsible for approving employees’ hours, and payroll personnel are responsible for checking that all employees’ records have been approved before exporting data to payroll.
Approvals can help minimize payroll errors and improve the lines of communication between supervisors and payroll personnel.

Once an employee’s record has been approved, all of his or her punches and pay records for the current (oldest active) pay period are displayed in the color gold and are “locked down” to prevent further changes. To make changes to approved punches or pay records, the employee’s record must be unapproved. Some users may not have permission to approve and un批准 employees’ records.

Employees’ records can be approved individually from the Approvals/Reviews screen in the Employees section or from the Employee Approvals screen in the Activities section of EmpowerTime. Individual employees can be approved on the Employee Approvals screen using the approval check box at the end of the employee row. Once all levels have been approved, the corresponding employee’s punches and pay records for the current pay period are approved and locked down.

Figure 129: Employee Approvals

**TIP:** The hourly summary columns displayed in the employee approvals are determined by the configuration of pay type groups in Chapter 5—Pay Types and Pay Type Groups.
CHAPTER 15—TIME OFF REQUESTS

15.1 Overview

The time off request feature is an option available when EmpowerTime™ is installed along with WebEntry. Employees enter time off requests through WebEntry, and supervisors use WebAdmin to review, accept, and decline requests.

As employees enter time off requests, EmpowerTime tracks a projected balance of benefit hours for each employee based on pending requests. EmpowerTime forwards a record of each incident to the appropriate supervisor, and supervisors also receive daily e-mails summarizing all requests entered by their employees.

Supervisors use WebAdmin to manage time off requests, review the history of accepted and declined requests, and enter comments related to requests. Management can run reports on employees who have requests pending, accepted, or declined. Approved time off requests are automatically converted into pay records and deducted from the appropriate attendance bank.

15.2 Standard Time Off Request Features

- Requests can be entered as far in advance as desired
- Accepts multiple pending requests
- Time off requests are automatically checked against the benefit rules and plan balances
- Benefit plan balances automatically track projected balances for pending requests
- Reports on time off requests are available in EmpowerTime

15.3 Assigning Employees to Supervisors

In order to enter time off requests, each employee must be assigned to a supervisor within EmpowerTime. To assign an employee to a supervisor, click on Employees in the navigation bar and then select Main. Next, click the browse button next to the Supervisor field and select the appropriate supervisor from the Search window as shown in the following figure. Note that supervisors must be set up in EmpowerTime before employees can be assigned to them.
Once all employees are assigned to a supervisor, check that each supervisor’s record in EmpowerTime includes an e-mail address. If a supervisor’s record does not include an accurate e-mail address, he or she will not receive notification of pending time off requests. Also, the employee’s record should include an accurate e-mail address so he or she can be notified upon approval or rejection.

### 15.4 Employees Workgroups

Employees can be assigned to a workgroup that defines the rules for time off requests (TORs). Workgroups determine when TORs can be submitted, how many TORs are allowed each day, and more. To configure workgroups, select **Employee Workgroups** from the **Rules Setup** drop-down menu. To create a new workgroup, click the **Add** button toward the bottom of the screen. To edit an existing workgroup, select the workgroup from the list and click the **Edit** button. Adding or editing a workgroup will display the Workgroup Details screen.
Figure 131: Workgroup Details

Workgroup

Each workgroup must be given a **Code** and a **Description**. The **Code** can be up to 10 characters in length, and the **Description** can be up to 25 characters in length.

TOR Settings

1. Once a **Code** and **Description** are assigned to the workgroup, configure the TOR settings. The first field defines how many hours before the requested day a TOR can be submitted. Employees will be unable to submit TORs after this setting. In the example above, employees can submit TORs through WebEntry up to 48 hours before the requested day. If this value is set at zero, then TORs can be submitted at any time during the active pay period.
2. The next field defines how far into the future TORs can be submitted. In the example above, employees can submit TORs up to 45 days in advance. This field can be set up to 9999 days.
3. Each workgroup can be set to automatically reject a TOR if it would result in a negative balance. If the **Yes** box is not checked, EmpowerTime will not automatically reject a TOR if it is greater than the employee’s available hours. If a supervisor then approves that TOR, the employee’s balance will show as a negative number until the next accrual of hours.
4. If holidays are set up in EmpowerTime, you can choose to highlight them on the WebEntry TOR calendar. Holidays will be highlighted in blue.
5. If the **Yes** box next to **Show Projected Accrual Balance** is checked, then employees will be able to see the projected accrual amount when making a time off request through WebEntry.
E-Mail Settings

EmpowerTime can send an e-mail to a specified address when new time off requests are pending. E-mails can be sent for each request or in a daily summary, depending on what option is selected from the drop-down menu. To disable the e-mail feature, select Never from the E-Mail Workgroup Address On TOR menu.

1. If e-mails are enabled, select whether the e-mail notice should be sent to the employee’s supervisor or to a different address from the E-Mail TOR Notices To drop-down menu.
2. To send all TORs from that workgroup to the same e-mail address, list that address in the Workgroup E-Mail field. Be sure that Workgroup E-Mail has been selected in the first step.
3. EmpowerTime can also send an e-mail to the employee when the TOR has been approved or denied. If the box next to E-Mail Employee Upon Approval Or Rejection is checked, the employee must have a valid e-mail address in their EmpowerTime record.

Workgroup Warning Levels

In this section, you will need to define how many time off requests in one day will cause a day to display as yellow or red in the TOR calendar in WebEntry. If an employee tries to request a day that is highlighted in yellow, he or she will receive a warning message that says a certain number of people have already requested that day off. If an employee attempts to submit a TOR on a day that is highlighted in red, that TOR will be automatically rejected.

To create custom restrictions for specific days, set up an additional restriction by clicking the Add button. You create additional restrictions for a particular date, a recurring schedule, or for a set range of days.

1. First, select the type of restriction from the Schedule Type drop-down menu. The options in the section below that menu will change depending on what schedule type is selected.
2. To set a restriction for a particular date, choose the date from the drop-down calendar.
3. Use this option if you want to set a restriction for a specific date each month.
4. To set a recurring restriction, select whether the restriction should occur Daily or Monthly. The Daily option allows you to define which day or days of the week the restriction should occur. Check the box next to each day of the restriction. The Monthly option allows you to define a set number of days at the beginning or end of each month. In the example on the next page, EmpowerTime will restrict TORs on the last three weekdays of the month.
5. To set a restriction for a range of dates, select Period from the Schedule Type dropdown menu. Then, choose a start and end date for restriction. To leave the end date unscheduled, check the box next to No End Day.
6. The Description section displays the restriction as currently defined. Double-check the description to make sure it’s set properly.
7. The final section, **Restrictions**, allows you to set the number of TORs allowed before displaying those days as yellow or red. If either field is set to zero, those days will be highlighted in that color before any TORs have been submitted. If both fields are set to zero, those days will display as red. In the example below, the last three weekdays of the month will display as yellow after one TOR has been approved. Those days will display as red after two TORs have been approved, therefore preventing any more TORs from being submitted.

![Additional Workgroup Restrictions](image)

**Figure 132: Additional Workgroup Restrictions**

8. When the restriction is configured, click the **Save** button along the top before closing the window. The custom restriction will now be listed on the Workgroup Details screen.

9. If you have configured more than one custom restriction, you will need to put them in order of priority in case of overlap. If two custom restriction rules fall on the same day, EmpowerTime will apply the first restriction in this list. To change the order of an item, select it and click either the up or down arrow. In the example below, February 1, 2008, falls under the first and third restrictions. Since the restriction that is set to deny all TORs on that date is listed before the one that limits TORs on Fridays, EmpowerTime will follow the restrictions defined in the first one.
10. If a restriction is set to deny all TORs, the item will show in red in this screen, as shown above. Denying time off requests on certain days is useful for planning around deadlines and other days when a full staff is needed.

11. Before closing the Workgroup Details screen, be sure to save any changes you’ve made.

**NOTE:** Restrictions defined under **Additional Restrictions** will override the warning levels set on the main WorkGroup Details screen.

### 15.5 Running Reports

The time off request feature includes three EmpowerTime reports. To access these report, go to the **Reports** section of the navigation bar and click **All**. Choose the report type you want to run from the list and configure the report using the fields on the right. To learn about configuring, running, and viewing reports, see Chapter 16—EmpowerTime Reports.

The Time Off Requests, Time Off Requests List, and Time Off Requests E-Mail reports allows the user to run a report with all records or with only records that match a certain criteria. That criteria set in the Report Range window that displays after clicking the Run Report button.
The Employee Workgroups and Workgroups reports are also helpful for reviewing which employees are assigned to a workgroup and what restrictions are assigned to a workgroup.

Figure 135: Time Off Requests Report
CHAPTER 16—EMPOWERTIME REPORTS

16.1 Overview

EmpowerTime™ includes a full suite of customizable time and attendance reports. EmpowerTime reports display a wide range of information including punches, total hours, exceptions, attendance transactions, attendance balances, schedules, lists, and labor cost data. Reviewing EmpowerTime reports is an important activity that can help management monitor employees’ work activities, stay abreast of payroll fluctuations, and effectively manage labor costs.

Figure 136: All Reports Screen and Reports Menu

All EmpowerTime reports are located through the Reports section of the navigation pane, in the Reports drop-down menu along the top, and in the Reports menu which can be found by default along the right side of the screen. Many of the same reports are also available in the EmpowerTime Historian. Sample copies of many commonly used EmpowerTime reports are provided later in this chapter.

16.2 Running Reports

EmpowerTime reports are grouped by type in the drop-down and pop-up menus, and the entire list of available reports is available in the All Reports screen, displayed by clicking Reports ➔ All in the navigation pane. To create and run a report, click the desired report. The generic report options will display to the right of the reports list.
when they are first run. Reports selected through the pop-up menu on the right will
display the options only, not the entire list of reports. Those options are described
below.

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<thead>
<tr>
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<th>Sub Total</th>
<th>Page Break</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>None</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Range Fields</th>
<th>Start Range</th>
<th>End Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 137: Report Options

The Report Options section, shown in the figure above, includes options for changing the default format and content of a report. The options available in this section are described below.

**Sort Field**
Defines up to three fields by which the selected report will be sorted. Sorting breaks reports into different segments. The sort options available in the drop-down menus include Last Name, Employee ID, Badge, Supervisor, Pay Class, Shift, Job, and all organization levels set up in the current company.

**Sub Total**
Defines whether or not a subtotal should be produced for each instance of the corresponding sort field. Subtotals may only be produced for the first two sort fields.

**Page Break**
Defines whether or not a page break should be inserted after each instance of the corresponding sort field. Page breaks may only be inserted after groupings corresponding to the first two sort fields.

**EXAMPLE:** A report is sorted by department, and both the Subtotal and Page Break options are set to Yes. The employees in the report are grouped by department codes, and a subtotal is produced for each department grouping. In addition, each new report grouping begins on a new page as a result of page breaking.

**Range Fields**
Defines up to three ranges of data to be reflected on a report. Rather than reporting on all employees, ranges can be used to minimize the data on a report. The range options available in the drop-down menus include Employee ID, Badge, Supervisor, Pay Class,
Shift, Job, and all organization levels set up in the current company. When configuring a report with a range, be sure to define a **Start Range** and an **End Range** before producing the report.

**REMINDER:** Users with filtered user IDs can only run reports on the employees to which permission has been granted.

Once all desired report parameters have been set, click the **Run Report** button in the lower right corner of the screen to produce the selected report. As shown in the following figure, most EmpowerTime reports prompt for the date range on which to run the report, and some reports prompt for additional setup parameters.

**TIP:** Temporary report files are created each time EmpowerTime reports are run. Users who create custom reports with external report writing programs may wish to save temporary report files for later use. To save temporary files, check the **Save Report Temporary Files** option. When selected, EmpowerTime prompts for a file name and location. Temporary report files are saved to the selected file name and location once the report preview pane has been closed.

Commonly used reports can also be saved for quick loading in the future. To save report settings, click **Save** in the dialog box shown above. EmpowerTime will ask for a file name for the saved report. Leave the offset fields set to **Default Date** and click **Save**. These report settings will be available through the **Load** button on the Reports screen. The **Save Report Settings** feature is described in detail later in this chapter.

After all prompts have been answered, a copy of the selected report will be available. To view a report, go to the **Pending And Ready Reports** screen and double-click the desired report. Reports with a green checkmark have not yet been viewed.
Figure 140: Pending and Ready Reports

REMARKER: A company logo can be loaded into EmpowerTime and displayed in the upper right hand corner of all reports. For more information see Chapter 3—Company Setup.

16.3 Favorite Reports

Users can create a customized menu of favorite reports in EmpowerTime. Favorite reports can be accessed by clicking Favorites from the Reports section of the navigation pane, or through the Favorite Reports pop-up menu. Reports can also be added using the Configure button on the Favorite Reports screen.
The Favorite Reports list makes it easier for supervisors to locate the reports they run most often without losing access to less commonly run reports. Reports can be added to the list from the Reports pop-up menu. Highlight the desired report, right-click it, and select Add To Favorites.

Reports are displayed in a report preview window like the one in the following figure.
A report toolbar is located at the top of the preview window. This toolbar contains buttons that magnify the report on the screen, scroll between different pages of the report, and send the report to a printer or file. The buttons in this toolbar are described below.

- **Opens the Print window.** All EmpowerTime reports can be printed or saved to file in various formats. Report output options are described later in this chapter.

- **Changes the size of the report displayed in the preview window.** Click the appropriate button to zoom in or out on the report.

- **Displays the magnification of the report in the preview pane.** The sizing buttons described above automatically adjust the magnification, but different percentages may be entered directly into this field.

- **Displays the page number currently open in the preview window.** Use the navigator buttons or enter a page number to scroll between pages.

- **Closes the report preview window and returns the user to the Report Options window.**

## 16.4 Print Options

The print options window is activated when the print button is selected from the toolbar in the report preview window. Several print and save options are available for all EmpowerTime reports.
To send the report to a printer, select the appropriate printer from the drop-down menu at the top of the window and specify the pages and number of copies to be printed. Keep in mind EmpowerTime can only print to printers that have been correctly set up in Windows.

**TIP:** EmpowerTime uses standard Windows print drivers to print reports. If you can view an EmpowerTime report but are unable to print it, try printing to a different printer or updating your print drivers.

All EmpowerTime reports can also be saved to file in a number of different formats. To save a report to file, check the **Print To File** box and select a file type from the drop-down menu. Some of the most commonly used file types include Excel, PDF (Adobe Acrobat), HTML, and Archive. Reports saved in the Archive file format can be viewed using the EmpowerTime Report Archive Reader utility. The Report Archive Reader is described later in this chapter. Next, click the browse button to the right of the **Where** field and select a file name and location in which to save the report. Click the **Save** button, and then click **OK**.

### 16.5 Saving Report Settings

Settings are also often saved for reports that are frequently run using the same sort, range, subtotal, page break, and date range options. To save report settings, select the appropriate report, configure the report options as necessary, and click the Run Report button. At the Report Date prompt enter the desired date range, select any additional options, and click the Save button. Using the Save Report Settings window, shown in the following figure, enter a name for the report settings and date offset options set to **Default Date**.
An unlimited number of report settings may be saved, so save as many variations of each report as necessary. For example, one version of a report may be saved for daily use, while another version is saved for use at the end of each week. To run a report using saved report setting, select the original report type from the All Reports list, and then click the Load button. Select the desired report settings from the drop-down menu, click OK, and a report is produced using the predefined report settings.

**EXAMPLE:** An Exceptions Report is run every morning on the exceptions from the previous day. Management would like to save the report settings so the report can be automatically produced by a macro. The sort, subtotaling, and page break options are set up before the report settings are saved. Next, the date range is set up so that the offsets in the Save Report Settings window read **Date Low Offset Is -1 From System Date** and **Date High Offset Is -1 From System Date**. When the macro runs, the report is always sorted correctly and reflects data only from the previous day.

### 16.6 Report Archive Reader

The Report Archive Reader is a utility used for viewing and printing EmpowerTime reports at workstations that are not set up to access EmpowerTime. When an EmpowerTime report is opened using the Report Archive Reader, the report is displayed in a preview window similar to the standard report preview window in EmpowerTime. Users who wish to use the Report Archive Reader to view EmpowerTime reports only need a copy of the program ArcRead.exe that is automatically loaded into the EmpowerTime directory during installation. The Report Archive Reader executable may be saved anywhere on a user’s local computer, and no configuration or setup is necessary to begin using it.

In order to view a report with the Report Archive Reader, the report must first be saved as an Archive format file in EmpowerTime. Once a report has been saved as an Archive file, it can be e-mailed to any supervisors or satellite workstations that have a copy of the Report Archive Reader program. Users who wish to view the report with the Archive Reader as shown in the figure below need only double-click ArcReader.exe and open the appropriate Archive file.
### Daily Activity Report

**Date:** 09/05/07  
**Time:** 11:03:05 AM  
**Report date:** 09/05/07

#### Table: Daily Activity Report

<table>
<thead>
<tr>
<th>Full Name</th>
<th>ID</th>
<th>IN/OUT</th>
<th>IN/OUT</th>
<th>Daily Reg Hrs</th>
<th>Daily Fr Hrs</th>
<th>Weekly Reg Hrs</th>
<th>Weekly Fr Hrs</th>
<th>Other Hrs</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnson, John</td>
<td>104</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Smith, Mary</td>
<td>105</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Brown, David</td>
<td>106</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Lee, Steven</td>
<td>107</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Anderson, Linda</td>
<td>108</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Jones, Robert</td>
<td>109</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>White, Sarah</td>
<td>110</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Garcia, Maria</td>
<td>111</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Mitchell, Elizabeth</td>
<td>112</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Thompson, James</td>
<td>113</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Clark, John</td>
<td>114</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Taylor, David</td>
<td>115</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Evans, Sarah</td>
<td>116</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Brown, Mary</td>
<td>117</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
<tr>
<td>Lee, Steven</td>
<td>118</td>
<td>3:00</td>
<td>3:00</td>
<td>2:00</td>
<td>1:00</td>
<td>3:00</td>
<td>2:00</td>
<td>0:00</td>
<td>No activity</td>
</tr>
</tbody>
</table>

**Figure 146: Report Archive Reader**
16.7 Sample Reports

Sample copies of EmpowerTime reports are provided below, and a brief description is provided with each report. Browse through the samples to get a feel for the format and contents of EmpowerTime reports.

Attendance Report

![Attendance Report Sample](image)

The Attendance Report displays employees' rounded In For Day punches, Out For Day punches, and total hours worked for a single day. Missing punches are highlighted by double question marks (??). The Attendance Report is typically used as an on-site listing of all employees who are currently clocked in or all employees who worked on a particular day. When the Attendance Report is produced with one or more sort fields, employees are sorted based on their home assignments rather than the labor detail codes actually worked.
Employee Approvals Report

The Employee Approvals Report provides a listing of the employee records that have been approved and highlights records that have not been approved. Approvals are listed along with the date and time at which the approvals were given. Users running this report may choose to see approved employees, unapproved employees, or both. This report is typically run before data is exported to payroll in order to ensure that supervisors have approved all employee records.
### Daily Activity Report

#### Figure 149: Daily Activity Report Sample

The Daily Activity Report displays rounded In For Day, Out For Day, and lunch punches (if applicable) from a single day. Daily and weekly regular and overtime hours are highlighted, and exceptions are noted to provide further insight into the daily activity. When the Daily Activity Report is produced with one or more sort fields, employees are sorted based on their home assignments rather than the labor detail codes actually worked.

<table>
<thead>
<tr>
<th>NAME</th>
<th>EMP ID</th>
<th>INL</th>
<th>OUTL</th>
<th>Daily Reg Hrs</th>
<th>Daily Ot Hrs</th>
<th>Weekly Reg Hrs</th>
<th>Weekly Ot Hrs</th>
<th>Other Hrs</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, Zahira</td>
<td>104</td>
<td>0700</td>
<td></td>
<td>1515</td>
<td>7.25</td>
<td>39.00</td>
<td></td>
<td></td>
<td>Early Out</td>
</tr>
<tr>
<td>Bianco, Peppe</td>
<td>108</td>
<td>1800</td>
<td></td>
<td>2330</td>
<td>8.00</td>
<td>32.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brown, Virgil</td>
<td>106</td>
<td>1800</td>
<td></td>
<td>2330</td>
<td>7.50</td>
<td>38.25</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Juarez, Marlen</td>
<td>107</td>
<td>0700</td>
<td></td>
<td>1500</td>
<td>7.50</td>
<td>29.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Johnson, Mary</td>
<td>109</td>
<td>1400</td>
<td></td>
<td>2300</td>
<td>8.00</td>
<td>1.00</td>
<td>39.60</td>
<td>2.00</td>
<td>Early In</td>
</tr>
<tr>
<td>Huang, Mary</td>
<td>110</td>
<td>1300</td>
<td></td>
<td>1730</td>
<td>4.50</td>
<td>22.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rodriguez, Richard</td>
<td>113</td>
<td>0700</td>
<td></td>
<td>1530</td>
<td>7.50</td>
<td>37.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rose, Judith</td>
<td>114</td>
<td>0700</td>
<td></td>
<td>1530</td>
<td>7.50</td>
<td>37.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pickwick, Richard</td>
<td>115</td>
<td>0700</td>
<td></td>
<td>1500</td>
<td>7.50</td>
<td>37.26</td>
<td></td>
<td></td>
<td>Absent</td>
</tr>
<tr>
<td>Smiley, Sally</td>
<td>116</td>
<td>0700</td>
<td></td>
<td>1500</td>
<td>7.50</td>
<td>37.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Harfield, Caroleyn</td>
<td>117</td>
<td>2300</td>
<td></td>
<td>0730</td>
<td>8.00</td>
<td>40.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kruse, Janet</td>
<td>118</td>
<td>0700</td>
<td></td>
<td>1530</td>
<td>7.50</td>
<td>37.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Elambe, Virginia</td>
<td>119</td>
<td>0700</td>
<td></td>
<td>1530</td>
<td>7.50</td>
<td>37.50</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jones, Gilbert</td>
<td>120</td>
<td>0700</td>
<td></td>
<td>1530</td>
<td>7.50</td>
<td>37.50</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Reports Totals**: 95.75 1.00 462.00 2.00 0.00
The Daily Utilization Report provides an employee-by-employee overview of a single workday. This report displays employees’ schedules, rounded In For Day and Out For Day punches, hours scheduled, hours worked, and any exceptions corresponding to the day. In addition, the variance between the number of hours each employee was scheduled to work and the number of hours actually worked is displayed. When the Daily Utilization Report is produced with one or more sort fields, employees are sorted based on their home assignments rather than the labor detail codes actually worked.
The Hours Worked Detail Report displays three sections of information for each employee. The top section is very similar to the standard EmpowerTime Timecard Report and displays actual punch times, exceptions, and actual and rounded lunch, break, and hourly totals. The middle section displays total hourly segments calculated by EmpowerTime for payroll. This section displays hours by day as well as by any differences in pay type or labor detail codes. The bottom section is similar to the standard EmpowerTime Hours Worked Summary Report and displays total weekly hours by pay type. When the Hours Worked Detail Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked.
Figure 152: Hours Worked Simplified Report Sample

The Hours Worked Simplified Report provides a detailed employee-by-employee listing of rounded daily punch times, lunch and break minutes, regular and overtime hours, and calculated dollars (optional). Daily exceptions and pay records are also noted. When the Hours Worked Simplified Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked.
The Hours Worked Summary Report displays total hours by pay type for each employee as well as for all employees. Users running this report can select the pay types to be displayed, and a landscape version of the report is available for companies with a large number of pay types. The landscape version is called Hours Worked Sum—Land. When the Hours Worked Summary Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked.

Figure 153: Hours Worked Summary Report Sample
Roll Call Report

The Roll Call Report lists employees' scheduled and actual start times for a day. Exceptions associated with employees' In For Day punches such as Tardy and Absent are also displayed. Managers can use this report to quickly identify attendance infractions and check staffing levels at the beginning of shifts. When the Roll Call Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked.

### Roll Call Report Sample

<table>
<thead>
<tr>
<th>Name</th>
<th>Emp ID</th>
<th>Sched In</th>
<th>Actual In</th>
<th>Exception</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bandana, Pepper</td>
<td>105</td>
<td>1500</td>
<td>1501</td>
<td>Tardy</td>
</tr>
<tr>
<td>Brown, Virgil</td>
<td>106</td>
<td>1500</td>
<td>1459</td>
<td></td>
</tr>
<tr>
<td>Jusso, Marlin</td>
<td>107</td>
<td>0700</td>
<td>0720</td>
<td>Tardy</td>
</tr>
<tr>
<td>Johnson, Mary</td>
<td>108</td>
<td>1500</td>
<td>1462</td>
<td>Early In</td>
</tr>
<tr>
<td>Huang, Mary</td>
<td>110</td>
<td>1300</td>
<td>1300</td>
<td></td>
</tr>
<tr>
<td>Rodriguez, Richard</td>
<td>113</td>
<td>0700</td>
<td>0700</td>
<td></td>
</tr>
<tr>
<td>Rox, Judith</td>
<td>114</td>
<td>0700</td>
<td>0700</td>
<td></td>
</tr>
<tr>
<td>Peacecek, Richard</td>
<td>115</td>
<td>1500</td>
<td>1500</td>
<td></td>
</tr>
<tr>
<td>Smiley, Sally</td>
<td>116</td>
<td>0700</td>
<td>0700</td>
<td></td>
</tr>
<tr>
<td>Krause, Janet</td>
<td>118</td>
<td>0700</td>
<td>0700</td>
<td></td>
</tr>
<tr>
<td>Bramble, Virginia</td>
<td>119</td>
<td>0700</td>
<td>0700</td>
<td></td>
</tr>
<tr>
<td>Jones, Gilbert</td>
<td>120</td>
<td>0700</td>
<td>0700</td>
<td></td>
</tr>
<tr>
<td>Anderson, Cornelia</td>
<td>121</td>
<td>1300</td>
<td>1300</td>
<td></td>
</tr>
<tr>
<td>DeWitt, Deana</td>
<td>125</td>
<td>1500</td>
<td>1500</td>
<td></td>
</tr>
<tr>
<td>Finn, Giel</td>
<td>126</td>
<td>0700</td>
<td>0713</td>
<td>Tardy</td>
</tr>
<tr>
<td>Marquita, Mary</td>
<td>127</td>
<td>0700</td>
<td></td>
<td>Absent</td>
</tr>
<tr>
<td>Goldstein, Alicia</td>
<td>128</td>
<td>0700</td>
<td>0700</td>
<td></td>
</tr>
</tbody>
</table>

Total employees at work: 16
### Timecard Report

**Figure 155: Timecard Report Sample**

The Timecard Report displays each employee’s timecard over the selected date range. Punches are listed by day of the week, date, actual time, and punch type, and the codes associated with transfer punches are displayed. Exceptions associated with punches are also noted, and both actual and rounded lunch, break, and daily totals are provided. When the Timecard Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked.
The Timecard Transfers Report displays all transfer punches recorded by employees within the selected date range including job transfers, shift transfers, concurrent transfers, pay class transfers, and organization level transfers. All other punch types are omitted from this report. Supervisors commonly use this report to check that employees entered the correct transfer codes each day. When the Timecard Transfers Report is produced with one or more sort fields, employees are sorted based on their home assignments rather than the labor detail codes actually worked.
### Exceptions Report

**Figure 157: Exceptions Report Sample**

The Exceptions Report displays exceptions that have been generated as a result of employees’ punching activity. Exceptions are listed on this report along with the corresponding employee, date, and day of the week. In addition, any applicable punch types, times, and minutes of difference are displayed. Users can run the Exceptions Report by either payroll dates or actual dates and may choose the exceptions to be displayed on the report. When the Exceptions Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked.

<table>
<thead>
<tr>
<th>Name</th>
<th>Emp Id</th>
<th>Day</th>
<th>Date</th>
<th>Description</th>
<th>Type</th>
<th>Time</th>
<th>Diff</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>Mon</td>
<td>04/28/03</td>
<td>Early Out</td>
<td>OUTD</td>
<td>3:10 PM</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>Tue</td>
<td>04/28/03</td>
<td>Tardy</td>
<td>IN</td>
<td>7:16 AM</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>Wed</td>
<td>04/28/03</td>
<td>Tardy</td>
<td>IN</td>
<td>7:16 AM</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>Wed</td>
<td>04/28/03</td>
<td>Early Out</td>
<td>OUTD</td>
<td>3:30 PM</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>Thu</td>
<td>05/01/03</td>
<td>Early Out</td>
<td>OUTD</td>
<td>3:10 PM</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>Pepper Bandana</td>
<td>105</td>
<td>Mon</td>
<td>04/28/03</td>
<td>Missing Punch</td>
<td>OUTD</td>
<td>2:59 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pepper Bandana</td>
<td>105</td>
<td>Thu</td>
<td>05/01/03</td>
<td>Absent</td>
<td>IN</td>
<td>3:03 PM</td>
<td>480</td>
<td></td>
</tr>
<tr>
<td>Vigil Brown</td>
<td>106</td>
<td>Mon</td>
<td>04/28/03</td>
<td>Tardy</td>
<td>IN</td>
<td>3:04 PM</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Vigil Brown</td>
<td>106</td>
<td>Thu</td>
<td>05/01/03</td>
<td>Absent</td>
<td>IN</td>
<td>3:03 PM</td>
<td>480</td>
<td></td>
</tr>
<tr>
<td>Vigil Brown</td>
<td>106</td>
<td>Fri</td>
<td>05/03/03</td>
<td>Late Out</td>
<td>OUTD</td>
<td>11:42 PM</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>Marian Juezex</td>
<td>107</td>
<td>Tue</td>
<td>04/28/03</td>
<td>Missing Punch</td>
<td>IN</td>
<td>3:29 PM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Marian Juezex</td>
<td>107</td>
<td>Wed</td>
<td>04/30/03</td>
<td>Tardy</td>
<td>IN</td>
<td>7:15 AM</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Marian Juezex</td>
<td>107</td>
<td>Fri</td>
<td>05/03/03</td>
<td>Tardy</td>
<td>IN</td>
<td>7:30 AM</td>
<td>20</td>
<td></td>
</tr>
</tbody>
</table>

Total Exceptions: 14
Rejected Punch Report

The Rejected Punch Report displays punches that could not be posted to a timecard. EmpowerTime rejects punches that are associated with invalid badge numbers or invalid transfer codes, and duplicate punches are also rejected. Rejected punches are displayed along with the corresponding badge number, employee, and date and time. Management should review this report periodically so that any necessary corrections can be made before data is exported to payroll.

Figure 158: Rejected Punch Report Sample

<table>
<thead>
<tr>
<th>Badge</th>
<th>Name</th>
<th>Date</th>
<th>Description</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>000000101</td>
<td>Adams, Donald</td>
<td>05/02/03</td>
<td>Invalid transfer code</td>
<td>2:38:00 PM</td>
</tr>
<tr>
<td>000000102</td>
<td></td>
<td>04/30/03</td>
<td>Invalid badge #</td>
<td>7:01:00 AM</td>
</tr>
<tr>
<td>000000105</td>
<td>Bandana, Pepper</td>
<td>04/09/03</td>
<td>Duplicate punch</td>
<td>11:30:00 PM</td>
</tr>
<tr>
<td>000000105</td>
<td>Bandana, Pepper</td>
<td>04/29/03</td>
<td>Invalid transfer code</td>
<td>11:15:00 AM</td>
</tr>
<tr>
<td>000000115</td>
<td>Peacock, Richard</td>
<td>05/02/03</td>
<td>Duplicate punch</td>
<td>11:30:00 PM</td>
</tr>
<tr>
<td>000000116</td>
<td>Smiley, Saly</td>
<td>04/30/03</td>
<td>Invalid transfer code</td>
<td>9:36:00 AM</td>
</tr>
<tr>
<td>000000119</td>
<td>Bramble, Virginia</td>
<td>05/02/03</td>
<td>Duplicate punch</td>
<td>7:00:00 AM</td>
</tr>
<tr>
<td>000000156</td>
<td></td>
<td>05/01/03</td>
<td>Invalid badge #</td>
<td>6:58:00 AM</td>
</tr>
<tr>
<td>000000142</td>
<td></td>
<td>05/01/03</td>
<td>Invalid badge #</td>
<td>6:33:00 AM</td>
</tr>
<tr>
<td>000000150</td>
<td></td>
<td>05/02/03</td>
<td>Invalid badge #</td>
<td>6:58:00 AM</td>
</tr>
<tr>
<td>000000200</td>
<td></td>
<td>05/01/03</td>
<td>Invalid badge #</td>
<td>7:03:00 AM</td>
</tr>
<tr>
<td>000000203</td>
<td>Darkwolf, Duke</td>
<td>04/29/03</td>
<td>Duplicate punch</td>
<td>7:00:00 AM</td>
</tr>
<tr>
<td>000000238</td>
<td></td>
<td>05/02/03</td>
<td>Invalid badge #</td>
<td>3:33:00 PM</td>
</tr>
</tbody>
</table>
Labor Analysis Report

The Labor Analysis Report displays each employee’s daily hours, weekly hours, and calculated dollars (optional). When the Labor Analysis Report is produced with one or more sort fields, employees are sorted based on the labor detail codes actually worked rather than their home assignments. The Labor Analysis Report is commonly sorted by job, shift, and organization levels in order to determine weekly labor costs for selected levels.
NOTES

Figure 160: Labor Summary Report Sample

The Labor Summary Report displays each employee’s hours by pay type for the selected date range. When the Labor Summary Report is produced with one or more sort fields, employees are sorted based on the labor detail codes actually worked rather than their home assignments. The Labor Summary Report is commonly sorted by job, shift, and organization levels in order to determine weekly labor costs for selected levels.
Labor Schedule vs. Actual Report

The Labor Schedule vs. Actual Report displays a comparison between each employee’s schedule and worked hours. This report calculates the variance between scheduled and worked hours and also displays calculated dollars (optional). When the Labor Schedule vs. Actual Report is produced with one or more sort fields, employees are sorted based on the labor detail codes they were scheduled to work or that they actually worked rather than their home assignments. The Labor Schedule vs. Actual Report is commonly sorted by job, shift, and organization levels in order to compare weekly labor costs against projected costs for selected levels.

Figure 161: Labor Schedule vs. Actual Report Sample
The Employee Schedule Report displays employees’ weekly schedules and total weekly scheduled hours. When the Employee Schedule Report is produced with one or more sort fields, employees are sorted based on their home assignments rather than the labor detail codes they are scheduled to work. This report is commonly posted for employees to review throughout a pay period.
## Labor Schedule Report

### Figure 163: Labor Schedule Report Sample

The Labor Schedule Report displays employees’ weekly schedules and total weekly scheduled hours. When the Labor Schedule vs. Actual Report is produced with one or more sort fields, employees are sorted based on the labor detail codes they are scheduled to work rather than their default assignments. This report is commonly posted for employees to review throughout a pay period.

<table>
<thead>
<tr>
<th>Name</th>
<th>EMP ID</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
<th>Sun</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Juan, Marian</td>
<td>107</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Johnson, Mary</td>
<td>108</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Brown, Virgil</td>
<td>106</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Jones, Gilbert</td>
<td>120</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Smith, Zachary</td>
<td>104</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Bender, Pepper</td>
<td>105</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Huang, Mary</td>
<td>110</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>20.00</td>
</tr>
<tr>
<td>Rodriguez, Richard</td>
<td>113</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Stanley, Jeff</td>
<td>116</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Mitchell, Carolyn</td>
<td>117</td>
<td>23:00-07:30</td>
<td>23:00-07:30</td>
<td>23:00-07:30</td>
<td>23:00-07:30</td>
<td>23:00-07:30</td>
<td>23:00-07:30</td>
<td>23:00-07:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Bernard, Virginia</td>
<td>119</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Anderson, Corina</td>
<td>121</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>13:00-17:30</td>
<td>20.00</td>
</tr>
<tr>
<td>D'Villa, Omar</td>
<td>125</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Rice, Judith</td>
<td>114</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>40.00</td>
</tr>
<tr>
<td>Rosslock, Richard</td>
<td>115</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>15:00-23:30</td>
<td>40.00</td>
</tr>
<tr>
<td>House, Janet</td>
<td>118</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>07:00-15:30</td>
<td>40.00</td>
</tr>
</tbody>
</table>

Totals: 120.00 129.00 130.00 126.00 112.00 8.00 60.00
Figure 164: Schedule vs. Actual Report Sample

The Schedule vs. Actual Report displays a comparison between each employee's schedule and worked hours. This report calculates the variance between scheduled and worked hours and also displays calculated dollars (optional). When the Schedule vs. Actual Report is produced with one or more sort fields, employees are sorted based on their home assignments rather than the labor detail codes they were scheduled to work or that they actually worked.
Overtime Report

The Overtime Report identifies employees who earned overtime hours within the selected date range. Each instance of overtime is listed along with the day and date on which the overtime hours were earned. When the Overtime Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes they actually worked when overtime hours were earned. This report can help management identify and reduce unwanted overtime hours.
Approaching Overtime Report

Figure 166: Approaching Overtime Report Sample

The Approaching Overtime Report lists all employees who worked greater or fewer hours than the threshold specified at the time the report is run. Users running this report must specify a number of hours and whether they wish to view employees who worked greater or fewer hours. When the Approaching Overtime Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked. This report is typically used to identify employees who are approaching weekly overtime situations.
The Payroll Transfer Report displays each employee’s total hours by pay type as well as by the different jobs, shifts, and organization level codes associated with hours. Given dollars (i.e., pay records added to account for tips, bonuses, etc.) are also reported. When the Payroll Transfer Report is produced with one or more sort fields, employees are sorted based on their default assignments rather than the labor detail codes actually worked. Payroll personnel typically use this report to compare the hours calculated by EmpowerTime against the hours transferred to payroll at the end of each pay period.

Figure 167: Payroll Transfer Report Sample

<table>
<thead>
<tr>
<th>Name</th>
<th>Emp Id</th>
<th>Job Code</th>
<th>Pay Type</th>
<th>Hours</th>
<th>Given Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pepper Bananas</td>
<td>905</td>
<td>OPER1</td>
<td>REG</td>
<td>12.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OPER1</td>
<td>REG</td>
<td>20.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>VAC</td>
<td>VAC</td>
<td>8.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>40.00</td>
<td>40.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Emp Id</th>
<th>Job Code</th>
<th>Pay Type</th>
<th>Hours</th>
<th>Given Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virgil Brown</td>
<td>906</td>
<td>MORENO</td>
<td>OVT</td>
<td>0.25</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MORENO</td>
<td>OVT</td>
<td>0.42</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MORENO</td>
<td>PTO</td>
<td>8.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MORENO</td>
<td>REG</td>
<td>28.25</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TECH1</td>
<td>REG</td>
<td>3.87</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>40.00</td>
<td>40.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

Totals: 80.00 $0.00
Attendance Balances Report

<table>
<thead>
<tr>
<th>Name</th>
<th>Emp Id</th>
<th>Attendance Plan</th>
<th>Available</th>
<th>Taken</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donald Adams</td>
<td>101</td>
<td>SICK/PTO</td>
<td>20.00</td>
<td>8.00</td>
<td>12.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>VACATION</td>
<td>40.00</td>
<td>0.00</td>
<td>40.00</td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>SICK/PTO</td>
<td>20.00</td>
<td>16.00</td>
<td>4.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>VACATION</td>
<td>40.00</td>
<td>32.00</td>
<td>8.00</td>
</tr>
<tr>
<td>Pepper Bandana</td>
<td>105</td>
<td>SICK/PTO</td>
<td>20.00</td>
<td>0.00</td>
<td>20.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>VACATION</td>
<td>40.00</td>
<td>24.00</td>
<td>16.00</td>
</tr>
</tbody>
</table>

Figure 168: Attendance Balances Report Sample

The Attendance Balances Report displays the attendance plan(s) to which each employee is assigned. Each attendance plan is listed along with the employee’s original balance of hours, number of hours taken, and remaining balance.
Attendance Detail Report

Figure 169: Attendance Detail Report Sample

The Attendance Detail Report lists the pay records that deducted time from each employee’s attendance bank(s) within the selected date range. This report displays the details associated with each transaction including the date, pay type, reason code (if specified), comment (if specified), and number of hours used.
Audit Punch Report

The Audit Punch Report displays the timecard audit trail for the selected date range. This report displays the changes EmpowerTime users made to employees’ timecards, the dates and times changes were made, the user IDs that made changes, the original punches, and the changed punches. This report is useful for monitoring users’ activities in EmpowerTime and resolving timecard disputes.

### Table: Audit Punch Report Sample

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Date</th>
<th>Time</th>
<th>Audit Reason</th>
<th>Audit Date</th>
<th>Audit Time</th>
<th>Type</th>
<th>User ID</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>04/25/03</td>
<td>07:00</td>
<td></td>
<td>04/25/03</td>
<td>OUTD</td>
<td>JOE</td>
<td></td>
<td>Original record</td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>04/28/03</td>
<td>15:30</td>
<td></td>
<td>04/28/03</td>
<td>OUTD</td>
<td>JOE</td>
<td></td>
<td>Changed to record</td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>04/28/03</td>
<td>15:19</td>
<td></td>
<td>04/28/03</td>
<td>IN</td>
<td>JOE</td>
<td></td>
<td>Original record</td>
</tr>
<tr>
<td>Zabrina Smith</td>
<td>104</td>
<td>04/30/03</td>
<td>07:00</td>
<td></td>
<td>04/30/03</td>
<td>IN</td>
<td>JOE</td>
<td></td>
<td>Changed to record</td>
</tr>
<tr>
<td>Pepper Bandana</td>
<td>105</td>
<td>04/20/03</td>
<td>15:00</td>
<td></td>
<td>04/20/03</td>
<td>IN</td>
<td>JOE</td>
<td></td>
<td>Changed to record</td>
</tr>
<tr>
<td>Pepper Bandana</td>
<td>105</td>
<td>04/20/03</td>
<td>13:32</td>
<td></td>
<td>04/20/03</td>
<td>IN</td>
<td>JOE</td>
<td></td>
<td>Original record</td>
</tr>
<tr>
<td>Pepper Bandana</td>
<td>105</td>
<td>04/20/03</td>
<td>18:45</td>
<td></td>
<td>05/01/03</td>
<td>XFER</td>
<td>SALLY</td>
<td></td>
<td>Original record</td>
</tr>
<tr>
<td>Vigil Brown</td>
<td>106</td>
<td>04/20/03</td>
<td>18:45</td>
<td></td>
<td>05/01/03</td>
<td>XFER</td>
<td>SALLY</td>
<td></td>
<td>Changed to record</td>
</tr>
<tr>
<td>Vigil Brown</td>
<td>106</td>
<td>04/20/03</td>
<td>18:00</td>
<td></td>
<td>04/20/03</td>
<td>IN</td>
<td>JOE</td>
<td></td>
<td>Changed to record</td>
</tr>
<tr>
<td>Marian Juarez</td>
<td>107</td>
<td>04/20/03</td>
<td>15:29</td>
<td></td>
<td>05/01/03</td>
<td>IN</td>
<td>JOE</td>
<td></td>
<td>Original record</td>
</tr>
<tr>
<td>Marian Juarez</td>
<td>107</td>
<td>04/20/03</td>
<td>07:00</td>
<td></td>
<td>05/01/03</td>
<td>IN</td>
<td>SALLY</td>
<td></td>
<td>Changed to record</td>
</tr>
</tbody>
</table>

Total Audits: 12

Figure 170: Audit Punch Report Sample
Figure 171: Audit Transactions Report

The Audit Transactions Report displays the transaction audit trail for the selected date range. This report displays the dates and times at which users posted punches, reindexed, packed; approved and unapproved employees; closed pay periods; and added, edited, and deleted pay records. User IDs and names are recorded along with each transaction. In addition, if the Show Detail box is checked when the report is produced, approvals are listed with the names and numbers of the corresponding employees. This report is useful for monitoring users’ activities in EmpowerTime and resolving timecard disputes.
The Employee Listing Report displays a list of employees along with each person’s organization level and rule assignments. This report is useful for checking that all employees are completely set up and assigned to the necessary rules and organization level codes.

**REMINDER:** More reports are provided under the *Listing* report group. The other reports in this group provide lists of the rules and user IDs set up in EmpowerTime. Listing reports are often used to verify that all rules and user IDs have been established.
CHAPTER 17—DAILY AND END-OF-PAY-PERIOD ACTIVITIES

17.1 Overview

This chapter describes the daily activities and end of pay period activities that one or more EmpowerTime™ users typically need to perform in order to ensure correct system performance from pay period to pay period. These activities include adding and updating employee records, polling time clocks, posting punches, reviewing and editing timecards and pay records, reviewing reports, approving hours, backing up data, exporting data to payroll, and closing pay periods.

Some of the activities described in this chapter may not apply in some situations, as every installation of EmpowerTime is different. In some cases a single user is responsible for all daily and end of pay period activities, while in other cases these responsibilities are distributed among several different users. For assistance with determining the functions and activities that apply to an EmpowerTime installation, please contact Empower Technical Support.

17.2 Daily Activities

The activities that should be performed on a daily basis depend on the configuration of EmpowerTime, the distribution of responsibilities among EmpowerTime users, and the hardware devices and software modules installed with EmpowerTime.

Some daily activities are required, meaning that EmpowerTime may not function correctly unless the activities are performed on a daily basis. For example, the posting process should be run at least one time per day. Required daily activities can often be automated to perform daily with no user intervention. Automation is described in Chapter 20—Automation.

Other daily activities are recommended but not required, meaning that they should be performed on a daily basis whenever possible. For example, EmpowerTime users should review and correct employees' timecards on a daily basis to ensure that accurate hourly totals are available each day. EmpowerTime will function correctly if recommended daily activities are performed only every few days, but the data on reports may not be as accurate.

Workflow and Tasks Bar

The Tasks bar located along the top of the Home screen of EmpowerTime provides easy access to a user’s daily workflow, making it easy for users to see exactly what needs to be done as soon as they log in to EmpowerTime. The Tasks bar can be customized to display only the current user’s daily activities.
Several tasks also display the number of items that need to be addressed in that category. For example, a supervisor can quickly tell how many time off requests need to be reviewed or how many new absences there are. Clicking any of these tasks will display a small version of the appropriate screen in the Home screen. Individual records displayed in this smaller frame can generally be edited by double-clicking the specific entry. For more information about the Workflow and Workflow Configuration, see Chapter 11—User Setup.

**KPIs**

EmpowerTime can display key performance indicators (KPIs) in chart form on the home screen. KPIs let users track workforce trends over time, allowing supervisors to save money and prepare for upcoming needs. These reports also help managers create performance reports and presentations for their department. Several KPIs are available, such as Actual vs. Scheduled Time, Hours by Org Level, and Overtime as % of Labor.

The **Actions** drop-down menu in the upper right corner allows the user to change how much information is displayed in the KPI. This menu will change depending on the type of KPI displayed, but it always includes an option to set the length of time shown in the graph. A button in the upper left corner of the KPI screen will display the legend for the chart. In the KPI Detail Form, users can set the date range, select the number of columns, and print a copy of the chart.
Users can now send messages instantly to other users in their company with the Message Center. New messages will display in the Home screen upon startup, and the Address Book feature allows users to easily select recipients from a list.

The inbox/outbox displays a list of messages on the left and the body of the message on the right.
Attendance Calendar

The Attendance Calendar is another way to track trends in the workforce. For example, users can tell if vacations by some employees means overtime for others, indicating that vacations aren't being covered properly and staff is overworked at those times. The calendar displays the exceptions and pay types selected by the user in a year-long calendar format. Each exception and pay type is assigned a different color, and the days on the calendar are highlighted according to the user settings. The calendar can be filtered with custom queries or set to display a single employee. When a day on the calendar is clicked, a chart will display below the calendar listing all of the relevant exceptions and pay types for that day.

Users can customize the assigned colors through a color-selecting tool. From the Exceptions or Pay Type drop-down menus, navigate to the category you want to customize. On the right of that field, there is a small drop-down menu that'll take you to the color-selecting tool. Highlight the color you want to display for that Exception or Pay Type. You can also specify which Exceptions and Pay Types are shown using the checkboxes to the left of each field.

Adding and Updating Employee Records

Depending on the frequency of employee turnover, EmpowerTime may need to be updated with new employee records on a daily, weekly, or as-needed basis. Newly hired employees cannot enter punches and collect hours until they have been completely set up in EmpowerTime. New employee records may be added manually or through an EmpowerTime employee import module. At a minimum, each new employee record must be assigned an employee ID, badge number, pay frequency, salary/hourly flag, active status, error class,
and pay class in order for EmpowerTime to collect punches and process hours. In some cases, employees may need to be assigned to other rules such as holiday class and rate override class codes.

If an employee import module is used to create new employee records in EmpowerTime, some additional configuration may be necessary once the import process is complete. EmpowerTime-specific setup options—such as pay class and holiday class assignments—cannot be imported from most payroll or human resources systems, so employees must be manually assigned to the correct codes after an import has been executed. Employee import modules can be automated to execute on any schedule necessary. For more information on automating employee import modules, see Chapter 20—Automation.

Depending on the frequency of organization changes, EmpowerTime may need to be updated with changes to employee records on a daily, weekly, or as-needed basis. For example, if an employee is permanently transferred to a new department, EmpowerTime should be updated with that change. New information can be manually updated in EmpowerTime or imported from a payroll or human resources system. Depending on the nature of company policies and the configuration of EmpowerTime, some changes should not be recorded in EmpowerTime until the end of the pay period.

**EXAMPLE:** Halfway through a weekly pay period, one employee is terminated and another is assigned to a new department code. The active status on the terminated employee’s record is not changed until the pay period data has been exported to payroll because a filter in the EmpowerTime payroll export module blocks out terminated employees’ hours. The record for the other employee is immediately changed so that the new department code is reflected in that person’s hours on the following day.

**Polling Time Clocks**

Polling is a process through which EmpowerTime communicates with time clock devices. If time clocks are used for data collection, they should be polled at least one time per day. Establishing a regular pattern of polling ensures that time clocks do not run out of memory and that EmpowerTime is frequently updated with employees’ punches. In addition, some models of time clocks can be configured to accept punches only from known badge numbers, so polling is required in order to download any new badge numbers (for new hires) and other validation information.

Several different time clock communication modules are available for different models of time clocks. These modules can be automated to execute the polling process at regular intervals for most models of time clocks. For more information on polling time clocks, please refer to the documentation included with the time clocks and the time clock communications module, or contact Empower Technical Support. For more information on automating the polling process, see Chapter 20—Automation.

**Posting Punches**

Posting is a critical system process that should be activated at least one time per day. The posting process accomplishes several important tasks:
1. Distributes newly polled punches to the appropriate timecards.
2. Applies pay and schedule rules to punches and hours in order to recalculate daily totals.
3. Identifies exceptions in employees' punching activity.

The posting process is typically automated to execute at least once per day but may be manually executed at any time. For more information on automating the posting process, see Chapter 20—Automation. For more information on the posting process, please see Chapter 19—System Utilities.

Identifying and Correcting Missing Punches

Identifying and correcting missing punches each day helps ensure that the data reflected on EmpowerTime reports is always accurate and up to date. EmpowerTime will function correctly if missing punches are not corrected each day, but the data on reports may not be as accurate. All missing punches must be corrected before data is exported to payroll at the end of each pay cycle. EmpowerTime provides a number of different ways to identify and correct missing punches:

1. Reports such as the Exceptions Report identify missing punches. Corrections can be noted on the report and entered into EmpowerTime later on.
2. The Missing Punch Edit utility provides a fast way to identify and correct missing punches. The Missing Punch Edit utility is described in Chapter 14—Timecards, Pay Records, and Approvals.
3. The Timecards screen provides several tools for reviewing and correcting employees' timecards. These tools are described in Chapter 14—Timecards, Pay Records, and Approvals.

Adding Pay Records

Adding pay records on a daily basis also helps ensure that the data reflected on EmpowerTime reports is accurate and up to date. Pay records are total hours or dollars transactions entered into EmpowerTime to account for paid time off, bonuses, tips, or salaried hours. The most commonly entered pay records are those that account for sick, vacation, or personal leave time. Depending on the size of the organization, pay records may need to be added daily or just on an as-needed basis. Pay records are added using the Pay Records screen in the Employee section. Keep in mind that some pay records, such as vacation and personal leave records, may deduct time from a balance of hours available in an employee's attendance bank. Other pay records, like those for company holidays, can be automatically generated by EmpowerTime when employees meet certain qualifications. Pay records are described in Chapter 14—Timecards, Pay Records, and Approvals. Attendance plans are described in Chapter 10—Attendance Plans.

Printing and Reviewing Reports

EmpowerTime includes a full suite of reports that are available in countless variations. Reviewing reports is an important process that can help management detect punching, scheduling, and labor distribution problems. Some of the reports most commonly used
EmpowerTime reports can be automatically e-mailed to anyone within an organization, and EmpowerTime users can generate reports whenever necessary. Reports can be saved in many different file formats including Excel, PDF, HTML, and text. Automatic report generation and distribution is described in Chapter 19—System Utilities and Chapter 20—Automation. Instructions on running reports are provided in Chapter 16—EmpowerTime Reports.

Summary

The daily activities for which different EmpowerTime users are responsible may vary, but it is important that daily routines be established to ensure that all applicable processes, reports, and activities are completed in a timely fashion. Establishing a fixed schedule of daily activities for each user helps minimize the amount of work required at the end of pay periods and prevents problems from slipping past unnoticed until the last minute. Keep in mind most users are responsible for additional activities at the end of each pay period, so be sure to allow for additional time when necessary. End of pay period activities are described in the following section.

17.3 End-of-Pay-Period Activities

End-of-pay-period activities are tasks that must be completed at the end of each pay cycle. The activities that should be performed depend on the configuration of EmpowerTime, the distribution of responsibilities among EmpowerTime users, and the hardware devices and software modules installed with EmpowerTime.

Some end-of-pay-period activities are required, meaning that EmpowerTime will not function correctly unless the activities are performed at the end of each pay cycle. For example, all missing punch corrections and timecard edits must be completed before payroll data is exported and processed, and the pay period closing process must be run after a pay period has ended and paychecks have been distributed. Required end-of-pay-period activities cannot be automated. Other weekly activities are recommended but may not be required. For example, it is highly recommended that an external backup of the entire EmpowerTime directory be made before closing a pay period, but EmpowerTime will continue functioning regardless of backup procedures.

Daily Activities

Many of the activities that need to be performed at the end of each pay period are the same daily activities described in the previous section. Activities like polling time clocks and correcting timecards should be performed every day, including the last day of a pay period. In fact, it is extremely important that users perform all applicable daily activities every day so that end-of-pay-period activities do not delay payroll. For example, if users do not correct any punches until the last day of a pay period, the export to payroll may be delayed until all users are able to catch up. Some of the daily activities that users should continue to perform at the end of a pay period include adding and updating
employee records, polling time clocks, posting punches, printing and reviewing reports, identifying and correcting missing punches, and adding pay records.

**Reviewing Reports and Making Corrections**

If all users perform their daily activities on a regular basis, end-of-pay-period activities should require little time to complete. Perhaps the best way to determine whether or not users have completed their assigned activities is to run reports. Some of the reports that payroll personnel typically run at the end of a pay period include the Exceptions Report, Rejected Punch Report, and Employee Approvals Report. The Exceptions Report identifies any missing punches or absences that still require attention. The Rejected Punch Report identifies any punches that were not posted to a timecard. Finally, the Approvals Report highlights any employees whose timecards and hours were not approved by a supervisor, indicating that punches and pay records may still need to be corrected or added.

**TIP:** All information available on EmpowerTime reports is also available on the screen. Exceptions can be viewed using the Exceptions button on the Timecards screen. Missing punches, rejected punches, and approvals can be viewed using the appropriate utilities available in the Activities screen.

Once reports have been reviewed, any problems highlighted by the reports must be corrected. After making any necessary corrections, the same reports should be run one more time to ensure that all data is accurate and ready to be exported to payroll.

Before exporting hours to payroll, payroll personnel should also print a report that can be used to compare the data in EmpowerTime against the data exported to payroll. The Payroll Transfer Report is commonly used for this purpose. Payroll personnel may also need to print additional reports for management. For example, if company policy dictates that hard copies of reports be archived, those reports should be printed before the pay period is closed. Keep in mind that some of the reports available in for current data are not available in the Historian, so all necessary reports on current pay period data should be printed or saved to file prior to running the pay period closing process. Sample reports and instructions on running reports are provided in Chapter 16—EmpowerTime Reports.

**Approving Employees’ Hours**

The approvals process is optional, but if it is enabled for some or all employees EmpowerTime users must approve those employees’ hours at the end of each pay period. Supervisors are typically responsible for editing timecards and entering benefit hours, and the approvals process provides a way for supervisors to indicate when they are finished editing employees’ records. Once an employee’s record is approved, his or her punches and pay records for the pay period are locked down so that further changes cannot be made unless the record is unapproved.

Payroll personnel should run the Approvals Report prior to exporting data to payroll in order to check that all employees’ hours have been approved. If any records have not been approved, payroll personnel should contact the appropriate supervisors and ask them to complete their edits and approvals so that data can be exported to payroll. For
more information on the approvals process see Chapter 14—Timecards, Pay Records, and Approvals.

**Exporting Data to Payroll**

Data must be exported from EmpowerTime to a payroll system or service in order to produce paychecks. In most cases, this process involves executing an EmpowerTime payroll export module. Otherwise, data may be keyed into payroll using a report such as the Payroll Transfer Report. For instructions on executing a payroll export module, please refer to the documentation included with the module.

If a payroll export module is used to transfer data to payroll, payroll personnel should compare the hours and dollars transferred to payroll against the Payroll Transfer Report or another EmpowerTime report. If the data is correct in EmpowerTime and the payroll export module is configured correctly, the data transferred to payroll should be accurate. Once the accuracy of the data in payroll has been verified, payroll may be completed as usual.

**REMINDER:** If multiple pay frequencies are set up within a company in EmpowerTime, each pay frequency must be exported to payroll separately. When data is exported to payroll for a particular pay frequency, the oldest active pay period for that pay frequency is always the pay period that is exported. That is why it is critical that pay periods are closed in EmpowerTime after each pay cycle is complete. An old pay period may be left open for several days after data has been exported to payroll, but it should be closed in EmpowerTime prior to the end of the following pay period.

**Backing Up Data**

Empower Software Solutions recommends using an external backup procedure (e.g., tape, CD, or separate drive) to back up the EmpowerTime directory on a daily basis. However, if daily backups are not possible, an external backup of the EmpowerTime directory should be made on a weekly basis or before running the pay period closing process. Check with your network administrator to find out the best way to implement a daily or weekly external backup procedure.

**WARNING:** Data that has been purged to the Historian by the pay period closing process can be viewed but may not be altered in any way. If data is not archived before the pay period closing process is run, the pay period data cannot be restored to the active Time and Attendance data if mistakes are found at a later date. Always make an external backup before closing a pay period.

**Closing the Pay Period**

The pay period closing process is the final activity to complete at the end of a pay cycle, but it does not need to be executed immediately after data is exported to payroll. The closing process is typically run after checks have been produced so that any last minute corrections can be made in EmpowerTime. However, the pay period closing process must be run before the end of the following pay period. Users should continue to perform their assigned daily activities both before and after the closing process is run.
When the pay period closing process is activated, data from the current (oldest active) pay period is purged to the EmpowerTime Historian where it may be accessed on an as-needed basis. In addition, the closing process rolls forward pay period dates (except for custom pay periods) and copies forward any schedule templates to which employees are assigned. If multiple pay frequencies are set up within a company in EmpowerTime (e.g., weekly and biweekly), each pay frequency must be closed separately.

**WARNING:** The pay period closing process should be executed only after pay period data has been successfully exported to payroll and all necessary reports have been run. Each pay period must be closed in order for data from the following pay periods to be available for payroll export.

**TIP:** To view the dates of the current pay period in EmpowerTime, press the F8 key on your keyboard.

The pay period closing process is described in the following section of this chapter.

### 17.4 Closing a Pay Period

The pay period closing process purges data from the current (oldest active) pay period and archives the data in the EmpowerTime Historian. Once a pay period has been closed, all punches, pay records, exceptions, total hours, and attendance transactions from that pay period can be viewed through the Historian but cannot be edited in any way. An external backup of the EmpowerTime directory should always be made prior to running the pay period closing process so that the pay period data may be restored at a later date if necessary.

The pay period closing utility can be found by clicking **General** under the **Activities** dropdown menu. To run the pay period closing process, check the **End Of Pay Period** box and click the **Close Pay Period** button. All three options available beneath the **End Of Pay Period** box are described below.

![Figure 179: General Screen in Activities Section](image-url)
Payroll Export
Creates a generic ASCII payroll export file for all employees assigned to the selected pay frequency (e.g., weekly, biweekly). When selected, EmpowerTime prompts for an export path, file name, and the pay frequency. The default file format produced by this utility cannot be customized. If a different file format is necessary, a payroll export module should be used for exporting payroll files.

**WARNING:** In most cases, a separate payroll export module is necessary to export data to payroll. Contact Empower Technical Support for more information on payroll export modules.

Move Attendance
Purges attendance transactions to the Historian for all employees assigned to the selected pay frequency (e.g., weekly, biweekly), thereby resetting those employees’ attendance balances. When selected, EmpowerTime prompts for the pay frequency to be purged. For more information see Chapter 10—Attendance Plans.

Close Pay Period
Purges data from the current pay period for all employees assigned to the selected pay frequency and archives the data in the EmpowerTime Historian. When selected, EmpowerTime prompts for the pay frequency to be purged.

The pay period closing process first prompts for pay frequency to be closed (e.g., some employees are paid weekly while other employees are paid biweekly) as shown in the following figure. Select the appropriate option and click **OK**.

![Figure 180: Select Pay Period](image)

The next prompt asks if the clock backup files (CK*.DAT) should be backed up for the pay period. This will create a ZIP file of containing all of the clock backup files for the pay period.

**WARNING:** An external backup of pay period data should always be made before the closing process is executed. If the EmpowerTime directory is damaged or deleted, any backup files created by EmpowerTime and saved in the corresponding company subdirectory may also be damaged or deleted.

As shown in the following figure, the next prompt in the pay period closing process is the final confirmation. Select **Yes** to continue with the closing process or **No** to cancel the operation.
Figure 181: Closing Process Confirmation
The next prompt in the pay period closing process, shown in the following figure, presents the option to copy schedule templates into the new pay period. This option applies only to employees who are assigned to one or more schedule templates. Select **Yes** to copy employees’ assigned schedule templates into the new pay period, or select **No** to skip this step.

Figure 182: Copy Schedule Templates Prompt

When the closing process continues EmpowerTime begins archiving data from the selected pay period unless critical errors are detected. If EmpowerTime detects any critical errors, a warning is generated as shown in the figure below. This warning typically indicates that one or more of the timecards about to be closed contain missing punches. If this warning is generated, select **No** to exit the closing process and review the Exceptions Report to determine which timecards contain the critical errors. Correct the critical errors before starting the closing process again so that the errors are not purged to the Historian.

Figure 183: Critical Errors During Closing Process

**TIP:** Missing punches are considered critical errors because EmpowerTime cannot calculate total hours for an employee’s workday if one or more punches are missing. Missing punches cannot be corrected once purged to the Historian, so you should not continue with the closing process if this error is generated. Be sure to track down the critical errors, make any necessary corrections, and run the posting process before running the closing process again.

Keep in mind also that any critical errors discovered during the closing process were reflected in the payroll export file, so corrections will probably need to be made in payroll as well.
If EmpowerTime does not detect any critical errors, the closing process begins after the **Yes** button is selected at the final confirmation. As shown in the figure below, the status of the closing process is displayed in the Closing Process window. The closing process typically takes several minutes to complete but may take longer depending on the number of employees assigned to the selected pay frequency.

![Closing Pay Period Progress](image)

**Figure 184: Closing Pay Period Progress**

Once the closing process is complete, EmpowerTime displays the dates of the new current pay period. Clicking any of the pay period buttons along the right will display a small calendar for visual reference.

![Active Pay Periods](image)

**Figure 185: Active Pay Periods**

**REMINDER:** If the employee approvals feature is activated, the pay period closing process can generate an additional warning if some of the records about to be closed are not approved. To ensure that the closing process notifies users when one or more records are not approved, set the **Approval Type** option in the Company Setup notebook to **Reminder**. For more information on this feature, see Chapter 3—Company Setup and Chapter 14—Timecards, Pay Records, and Approvals.
The closing process performs many different functions, all of which are described below.

**Copy and Purge Data**
Copies all punches, hours, pay records, exceptions, and attendance transactions (if applicable) from the selected pay period to the Historian and purges them from the active records. Records corresponding to pay periods or dates that were not closed are not copied or purged.

**Update Dates**
Rolls forward the dates of the selected pay period so that the following pay period is flagged as the current pay period. Only custom pay period dates are not automatically rolled forward.

**Copy Schedules**
Copies forward schedules for all employees assigned to the selected pay frequency. Employees' assigned schedule templates are copied into the new pay period only if the option is selected at the time the pay period closing process is activated.

**Update Carry-Forward Hours**
Updates and records carry-forward hours for semi-monthly and monthly employees. This ensures that weekly overtime can be calculated in the new pay period if necessary.

**Remove Old Clock Backups**
Purges backup clock files (CK files) that are more than 45 days old. Backup clock files can be used to recover original punch transactions as described in Chapter 19—System Utilities.

**Enables Paid Holidays and Payroll Data Export**
Enables EmpowerTime to automatically pay employees for holiday hours and export hours for the following pay period. If holiday classes are used, EmpowerTime cannot create holiday pay records in a new pay period until the previous pay period is closed. In addition, data for the new pay period cannot be exported using an EmpowerTime payroll export module until the previous pay period is closed.
CHAPTER 18—CHAPTER 18—HISTORICAL DATA AND REPORTS

18.1 Overview

When the pay period closing process is run at the end of each payroll cycle, data from the current (oldest active) pay period is purged from EmpowerTime™ and placed in the EmpowerTime History section, or Historian. Data moved to the Historian cannot be modified but may be viewed either on the screen or through History reports. Timecards, payroll totals, exceptions, pay records, time off requests, and attendance transactions from previous pay periods are all archived in the Historian. Users with permission to access the History section may retrieve this information at any time.

The Historian can accumulate a large amount of data as more and more pay periods are closed. Although there is no limit to the size of history tables, extremely large amounts of data may result in decreased system performance. Purging unnecessary data from the Historian can help keep EmpowerTime optimized while minimizing the number of old transactions through which users must scroll while working in the Historian. Be sure to check local laws and company policies before purging data.

**TIP:** Historical data cannot be imported from external systems. The only way to add data to the EmpowerTime Historian is to run the pay period closing process. Be sure to retain any necessary time and attendance records from previous pay periods that are archived in separate programs or reports.

18.2 Browsing Historical Data

Historical data can be browsed by clicking on Browse Data in the History drop-down menu. You can then choose from one of five categories in the Browse Data submenu. When the History Browse Data section is opened, the screen displays any historical data for the employee with the lowest employee ID number. The name and employee ID number of the employee currently displayed are listed near the top of the screen. Use the buttons on the navigator toolbar at the top of the screen to scroll between employees or to search for a specific employee's historical records.

**REMINDER:** Users with filters established on their IDs can only view the historical records of the employees to which permission has been granted.

By default, all historical data for the current employee is displayed when the History Browse Data section is opened. As transactions are archived in the Historian, users may find it difficult to locate specific transactions. To limit the number of displayed transactions, check the Date Range box near the top of the screen and enter starting and ending dates as shown in the following figure. Alternatively, date ranges may be defined by selecting dates with the drop-down calendars available in the starting and ending date fields.
Figure 186: Selecting a Date Range

Once a date range has been established, it remains in place while scrolling through other employees or categories in the History Browse Data section. To remove a date range, simply uncheck the Date Range box. The five categories in the History Browse Data section are described in the following pages.

Timecard History

The Timecard History screen, shown in the figure below, displays all punches and pay records for the current employee in previous pay periods. All In For Day, Out For Day, lunch, break, and transfer punches are displayed along with dates, actual and rounded times, and any corresponding labor detail codes. Punches that were changed or added by an EmpowerTime user are displayed in green, while all original time clock transactions are displayed in black. Any missing punches that were not corrected before being purged to the Historian are displayed in red. Use the up and down arrow keys or the scroll bar along the right side of the screen to navigate between punches on an employees' timecard. Records can be sorted from newest to oldest, by a specific dated and then each date in reverse order, or by a PDATE (pay date) entry.

Figure 187: Viewing Timecards in Employee History

This screen is very similar to the Timecards screen in the Employee Setup section, but punches cannot be edited, added, or deleted once they have been purged to the
Historian. This screen simply provides users with a quick overview of an employee’s punch and pay record history without running a report.

**Payroll History**

The Payroll History screen, shown in the figure below, displays hourly totals calculated for the current employee in previous pay periods. This screen lists total calculated hours by day as well as by any differences in pay type, pay class, job, shift, and organization level codes. Use the up and down arrow keys or the scroll bar along the right side of the screen to navigate between daily totals. Daily totals cannot be changed or deleted once they have been purged to the Historian.

![Figure 188: Viewing Payroll in Employee History](image)

This screen is very similar to the Hourly Breakout utility on the Timecards screen in the Employee Setup section. In fact, all daily totals displayed on the Payroll screen are exactly the same as they appeared in the Hourly Breakout utility before the corresponding pay periods were closed. This screen provides users with a quick summary of an employee’s calculated hours per day without running a report.

**Exceptions History**

The Exceptions History screen, shown in the figure below, displays exceptions generated by the current employee’s punching activity in previous pay periods. Exceptions are listed with the corresponding dates and the number of minutes of difference (when applicable). Use the up and down arrow keys or the scroll bar along the right side of the screen to navigate between exceptions. Exceptions cannot be edited or deleted once purged to the Historian.
Figure 189: Viewing Exceptions in Employee History

This screen is similar to the Exceptions utility on the Timecards screen in the Employee Setup section. This screen provides users with a quick summary of an employee’s previous exceptions without running a report.

**Attendance History**

The Attendance History screen, shown in the figure below, displays any attendance transactions recorded for the current employee in previous pay periods. Attendance transactions are listed by date and may also include pay type codes, reason codes, comments, and a number of hours that were deducted from an attendance bank (when applicable). Use the up and down arrow keys or the scroll bar along the right side of the screen to navigate through the list of attendance transactions.
NOTES

Figure 190: Viewing Attendance in Employee History

This screen is very similar to the Attendance screen in the Employee Setup section, but attendance transactions cannot be edited once they have been purged to the Historian. This screen provides users with a quick overview of an employee’s old attendance transactions without running a report.

18.3 Purging Data from the Historian

The Historian accumulates a large amount of data as pay periods are closed in Time and Attendance. There is no limit to the amount of data that can be archived, but extremely large tables may degrade system performance and are more likely to corrupt. In order to maintain the integrity of history tables and keep system performance optimized, the Purge History process should be run from time to time.

A schedule should be established to ensure that data is purged from the Historian on a routine basis. Data is typically purged from the Historian once or twice per year depending upon company policies. Keep in mind that local, state, and union laws may require time and attendance data to be archived for a specific number of years. If necessary, data can be backed up before the purging process is run. Data may be backed up by printing history reports or by making a complete external backup (e.g., tape, CD, or external drive) of the EmpowerTime directory before purging data.

To purge data from the history, select Purge History from the History drop-down menu. As shown above, EmpowerTime prompts for the date before which all history records will be purged. Enter the desired date or select a date using the drop-down calendar and click Save to purge the selected history records.
WARNING: Be sure to check all applicable laws and policies before purging data from the history.

18.4 History Reports

The History Reports list includes many of the same reports as those created for current pay periods, but history reports only display data from pay periods that have been closed. Reviewing history reports can help management evaluate employees’ hours and work habits, resolve timecard disputes, and calculate labor costs over a selected period of time.

History reports are organized into report groups. To view the reports available, scroll to the bottom of the list in the All Reports screen. History reports are also accessible from the Reports drop-down menu along the top of the screen and the Reports pop-up menu on the right side of the screen. To run a report, select the appropriate report and set the Sort Fields and Range Fields.

TIP: When running history reports, select dates carefully to avoid producing very long reports.

Running Reports

The process of producing, printing, and saving history reports is exactly the same as for other reports. The only difference is that history reports reflect historical data, while the regular reports reflect current data. For sample reports or instructions on producing reports, see Chapter 16—EmpowerTime Reports.

REMINDER: Restricted users can only run reports on the employees they have permission to view.

TIP: EmpowerTime uses standard Windows print drivers to print reports. If you can view an EmpowerTime report in the preview window but encounter problems printing the report, try printing to a different printer or updating your print drivers.
CHAPTER 19–CHAPTER 19—SYSTEM UTILITIES

19.1 Overview

This chapter describes the system utilities available in EmpowerTime™ for processing data, performing maintenance routines, and other critical functions. One or more EmpowerTime administrators should be responsible for executing all applicable system utilities whenever necessary. Most of the utilities described in this chapter are located either on the Activities section or in the Utilities drop-down menu located at the top of the screen as shown in the figure below. Several customization options are described at the end of this chapter.

Figure 192: Utilities Drop-Down Menu

19.2 Posting

Posting is a critical system process that recalculates employees' punches and hours, identifies exceptions, and distributes newly polled punches to the appropriate timecards. The posting process should be executed at least one time per day in order to maintain current data and ensure that scheduling and pay rule changes take effect. However, in some cases it may be necessary to post multiple times each day. The posting process may be executed by an EmpowerTime user or automated to execute at regular intervals. For more information on automation, see Chapter 20—Automation.

The posting utility is located on the Activities section. To execute the posting process, simply click the Post Punches button. The amount of time required to execute the
posting process depends on the speed of the computer running the process, the number of employees in the current company, the type of rules to be applied to data, and the amount of data currently in the active pay period. Posting will process the records of all employees with a non-terminated status.

**REMINDER:** A separate posting utility is available on the Timecards screen in the Employee Setup section, but the timecard posting utility only posts the timecard of the currently displayed employee. In addition, the timecard posting utility cannot post newly polled punches to employees’ timecards. Although the Timecards screen posting utility is useful for recalculating totals while correcting timecards, the general post utility should still be run at least once per day.

### Posting Options

By default the posting process distributes newly polled punches to the appropriate timecards and recalculates all employees’ rounded punch times, exceptions, and daily totals based on EmpowerTime rules. This default behavior can be modified using posting options. To view the posting options, right-click the **Post Punches** button as shown in the following figure.

![Figure 193: Post Punches Right-Click Menu](image)

To enable a posting option, simply click the appropriate option in the pop-up menu. As shown in the preceding figure, a checkmark indicates all posting options currently enabled. The options available in the posting options pop-up menu are described below.

**Remove All SHXs**

Indicates that the posting process will temporarily remove all shift transfer (SHX) punches from employees’ timecards. Temporarily removing shift transfer punches can help users more easily review other types of punches (such as In For Day and Out For Day punches) on employees’ timecards. Unless pay class rules are modified in the meantime, shift transfer punches that are temporarily removed are re-added once the posting process is executed without this option enabled.

**Reenter All Salaried Hours**
Indicates that the posting process will recalculate pay period hours for all employees designated as **Salaried With Hours**. This option is useful if Salaried With Hours employees are reassigned to a new pay period or if the Salaried With Hours rules are modified.

**New Punches Only**
Indicates that the posting process will only post newly polled punches. When enabled, the posting process is faster because it does not recalculate daily totals, rounded punch times, and exceptions for punches that have already been posted to employees' timecards.

**EXAMPLE:** A business tracks 1000 employees between three shifts and all employees are paid biweekly. A user polls the time clocks and posts punches at the beginning of each shift so that managers can run a Roll Call report to check staffing levels. However, due to the number of employees and quantity of data, the complete posting process takes too long to run at the beginning of each shift. Instead, the user posts with the **New Punches Only** option enabled so that employees’ In For Day punches can be viewed on the Roll Call report. The complete posting process is executed nightly when it does not interfere with daily activities.

**Recalculate Modules**
Indicates that the posting process will recalculate attendance point balances and benefit hour balances. This option applies only if Points Manager or Benefits Manager is installed. For more information on the Points Manager and Benefits Manager modules, please contact Empower Technical Support.

### 19.3 Rejected Punch Maintenance

Depending on the configuration of EmpowerTime and the type of data collection devices in use, EmpowerTime may occasionally reject punches as invalid. A punch is typically rejected as invalid only if it is a duplicate punch or if it is associated with a badge number or a labor code that does not exist in EmpowerTime.

**EXAMPLE:** A new employee is given a badge and begins punching, but the employee’s badge number is incorrectly entered into EmpowerTime. When the time clock is polled, the new employee's punches are rejected as invalid because EmpowerTime does not recognize the badge number. An EmpowerTime user corrects the employee's rejected punches by reassigning them to the correct badge number and reposting. The new employee is issued a new badge with the correct number so that future punches are not rejected.

**EXAMPLE:** An employee mistakenly enters two In For Day punches at 7:00 in the morning on the same day, so EmpowerTime rejects the second In For Day punch as a duplicate punch.

At least one EmpowerTime user should be responsible for checking and correcting rejected punches prior to the end of each pay period. Some rejected punches—such as duplicate punches—do not need to be corrected, but other types of rejected punches—
such as punches associated with invalid badge numbers or labor detail codes—must be corrected to ensure that all employees’ total hours are correct.

Rejected punches must be corrected and re-posted to the appropriate timecards using the **Rejected Punch Maintenance** utility. To access the Rejected Punch Maintenance utility as shown in the following figure, click the **Rejected Punches** button in the Activities section.

![Rejected Punch Maintenance Utility](image)

The **Rejected Punch Maintenance** utility displays one rejected punch per row, and each punch is listed along with all available information. To edit a rejected punch, double-click the appropriate punch or highlight it and click the **Edit** button. Use the edit window, shown in the figure below, to make all applicable changes to the rejected punch.

**TIP:** Rejected punches can be corrected and re-posted only if the pay period in which they occurred has not yet been closed, as the pay period closing process deletes rejected punches. Be sure to check for rejected punches before the end of every pay period.

Once a rejected punch has been corrected, click the **Repost** button located near the top of the Rejected Punch Maintenance utility. If a rejected punch has been accurately corrected, it will be removed from of the Rejected Punch Maintenance utility and placed on the appropriate employee’s timecard.
19.4 Rebuilding Clock Files

Each time that time clocks are polled, punch transactions are downloaded from the time clocks into a dynamic file called CLOCK.DAT. When the posting process is run, the transactions contained in the CLOCK.DAT file are posted to employees' timecards and the file is deleted. CLOCK.DAT is a dynamic file that is continually created, appended, and deleted throughout the life of a company.

All the transactions that pass through the CLOCK.DAT are also recorded in backup files called CK files. The naming convention for CK files is CKYYMMDD.DAT, where YY is the year, MM is the month, and DD is the day on which the transactions were downloaded from time clocks. CK files are stored in the corresponding company subdirectory and are automatically deleted after 45 days to ensure that drive space is not monopolized. In the unlikely event that employees' timecards are deleted, CK files can be used to rebuild a CLOCK.DAT file containing the original punch transactions.

To recreate a CLOCK.DAT file from CK files, select Rebuild Clock Files from the Utilities drop-down menu. As shown in the following figure, enter both the first and last dates of the CK files to be rebuilt and click the Rebuild button. All transactions stored in CK files that were created within the specified date range are recompiled into a CLOCK.DAT file. Once a CLOCK.DAT file has been rebuilt, the posting process must be run in order to distribute the transactions to the appropriate timecards. Any rebuilt transactions that are duplicates of punches already in employees' timecards are archived in the Rejected Punch Maintenance utility.
19.5 Purging Audit Records

Many of the activities performed by EmpowerTime users are automatically recorded in one of two audit trails, thereby providing a way for EmpowerTime administrators to monitor users’ activities. The timecard audit trail records all changes made to employees’ timecards. The transactions audit trail records all changes made to employees’ pay records as well as all instances where critical system processes were activated. These critical system processes include posting, closing pay periods, reindexing, packing, and approving employees’ records. Audit trail records may be viewed on the Audit Punches report and the Audit Transactions report.

The timecard and transaction audit trails should be purged on a regular basis in order to prevent the tables from growing overly large. Purging the audit trails once or twice per year is sufficient in most cases. To purge the audit tables, select Purge Audit Transactions or Purge Timecard Audit Trail from the Utilities drop-down menu. As shown in the following figure, EmpowerTime prompts for the date before which audit records should be purged when one of the purge utilities is activated. Enter the desired date, or use the drop-down calendar to select a date, and click OK.

As shown in the following figure, both audit trail purge utilities provide the option of making a backup before the purging process begins. To back up audit trail data before purging, check Yes and enter a suitable name for the backup database. By default, audit record backup tables are saved in the subdirectory corresponding to the currently active company.
Figure 198: Backing Up Purged Databases
19.6 Mass Updates

Mass updates are used to quickly change multiple database records. Mass updates can be executed on any EmpowerTime table but are most commonly executed on the employee table. For example, a mass update could be used to assign a group of employees to a new job code or holiday class code without actually touching each employee record. Mass updates are extremely useful when creating employee records or making organization changes.

Two different mass update utilities are available in EmpowerTime—one in the Processes menu located above the Employee Setup section, and one in the Utilities drop-down menu. The mass update utility located in the Processes menu may be used only to modify fields in the employee table, while the mass update utility located in the Utilities menu may be used to modify fields in any EmpowerTime table.

**WARNING:** Do not attempt to mass update any tables other than the employee table without assistance from Empower Technical Support, and always make an external backup before executing a mass update. Incorrectly running mass updates can cause irreparable damage.

The Employee section Mass Update utility, shown in the following figure, defines the field within the selected table to be changed, the specific records to be updated, and the new value to be entered in the selected field. Click the browse button (located to the right of the Select The Field To Update option) and use the Lookup window to locate the appropriate field. The fields available in the Lookup window vary depending on the table to be updated with the mass update.

![Mass Update Utility from Employees Processes Menu](image)
Next, select the appropriate radio button next to the Replace With option. These two options are described below.

**New Value**
Specifies that the old value(s) in the selected field will be replaced with a new value. This is the most common kind of mass update.

**SQL Query Statement**
Specifies that the new value(s) for the selected field will be defined based on the existing value(s) in the field. This is an advanced mass update option that should not be attempted without assistance from Empower Technical Support.

Next, enter the new value to be inserted in the selected field. In the following example, a mass update is configured to update the Holiday Class field in the employee table with a value of "01."

![Mass Update](image)

**Figure 200: Updating Holiday Class with the Mass Update Utility**

The final step is to define the records to be modified by the mass update. By default, the mass update utility modifies all records in the selected table unless a filter is established. Click the Set Filter button to establish a filter. To update all records in the selected table, skip this step and proceed with the mass update. Filters are described later in this chapter.

**WARNING:** Be sure to ask the EmpowerTime or network administrator to make an external backup of the EmpowerTime directory before making changes with the mass update feature. There is no undo feature.

Once the field to update, a new value, and any applicable filters have been defined, click the Save button to run the mass update. After running a mass update, check that the change has been applied.
Security Templates

Security templates automate the application of permissions to user setup. User Setup is discussed in detail in Chapter 11—User Setup.

19.7 Shutdown Request

The Shutdown Request utility provides a way for EmpowerTime administrators to force other users out of the system and keep them out for as long as necessary. This utility is especially useful when troubleshooting or maintenance procedures need to be performed. For example, an EmpowerTime administrator can force other uses out of the system before reindexing or removing temporary directories. Once a shutdown request has forced users out of EmpowerTime, only the computer that initiated the request can access EmpowerTime until the request is canceled.

To initiate a shutdown request, click on Request Shutdown in the Utilities drop-down menu. Enter a reason and delay time in the Shutdown Request Information window as shown in the figure below, and then click OK. Note that the minimum delay time is five minutes. After the specified number of minutes has expired, any users who have not voluntarily exited EmpowerTime are forced out of the program.

![Figure 201: Shutdown Request](image)

Once a shutdown request has been issued and executed, all users other than the initiator are prevented from reentering EmpowerTime until the shutdown request is canceled. To cancel a shutdown request select Cancel Shutdown from the Utilities drop-down menu. Only the computer that initiated a shutdown request can cancel it.

Both the Request Shutdown and Cancel Shutdown features may be executed by an EmpowerTime user or automated to execute at regular intervals. For example, EmpowerTime could be configured to automatically issue a shutdown request, then activate the posting process five minutes later, and finally cancel the shutdown request ten minutes after activating the posting process. Adding shutdown requests to automated procedures can help prevent users from interfering with scheduled maintenance tasks. For more information on automation, see Chapter 20—Automation.
19.8 E-Mail Setup

EmpowerTime can be configured to automatically produce, save to file, and e-mail reports to designated recipients at specific times. In order to set up a report for automatic distribution through e-mail, the following steps must be completed.

1. Settings for the particular report must be configured and saved as described in Chapter 16—EmpowerTime Reports.
2. An SMTP-compatible server and the corresponding port must be defined in the Server Information window as described below.
3. E-mail addresses and e-mail groups must be defined in the Address Book window as described below.
4. A report macro must be created, configured, and scheduled as described in Chapter 20—Automation.

Server Information

To define an SMTP-compatible server and port, select E-Mail Setup from the Utilities dropdown menu, and then click Server Information. Enter the server name and port number into the Server Information window as shown in the figure below.

![SMTP Server Information](image)

Figure 202: SMTP Server Information

Address Book

To define the e-mail addresses and e-mail groups to which reports will be automatically emailed, click on E-Mail Setup in the Utilities drop-down menu, and then click on Address Book. There are two tabs at the bottom of the address book window, E-Mail Groups and E-Mails.
E-mail addresses must be defined before groups of addresses can be created. To enter an email address, click the Add button located along the bottom of the window as shown in the preceding figure. Enter the individual’s name and complete e-mail address in the appropriate prompts.

To create a group of e-mail addresses, select the E-Mails tab then click the Add Group button. As shown in the figure below, all available e-mail addresses are listed in the left pane. Use the buttons in the center of the window to move all applicable addresses to the right pane. Note that individuals may be a part of multiple e-mail groups.
19.9 Filters

The filter utility is used for many different purposes throughout EmpowerTime. For example, filters can limit the employee records a user is permitted to view, the employee records that are exported to payroll, and the employee records that are affected by a mass update. Filters are always created using the Filter Dialog window as shown in the following figure.

Figure 206: Set Filter
Filters are always based on values in one or more fields in an EmpowerTime table, and the tables on which filters are based can differ. For example, user ID filters are always based on the employee table, while filters for mass updates can be based on any EmpowerTime table. However, most filters are set up using values in the employee table.

Regardless of the table on which a filter is based, the first step in setting up a filter is to select a field from the pane on the left side of the window. The fields available are the fields in the table the filter is based on. In the following example, the fields available to the filter are the fields in the employee table. A filter has been set up on D_ACTIVE, and an exact match for the value A (for active employees) has been defined.

**TIP:** The fields within any given EmpowerTime table all start with the same characters. For example, all fields in the employee table begin with the prefix D_ followed by the name of the field. Each table uses unique leading characters in field names.

While selecting fields from the left pane, the fields can be ordered either alphabetically or logically. Select the appropriate radio button to adjust the field order. Once a filter has been established on one or more fields, those filters can be viewed by clicking on the **Searched** tab or the **View Summary** button.

After selecting a field, a distinct value or range of values for that field must be defined. Select either the **By Value** or **By Range** tab and enter the appropriate value or range of values. When defining a distinct value, be sure to specify whether the value is an **Exact Match**, **Partial Match**, or **Partial Match At Beginning**. If the distinct value is case sensitive, place a check mark in the **Case Sensitive** box. Filters can also be used to exclude values by checking the **Non-Matching Records** option.

![Figure 207: Creating a Filter for Active Employees](image-url)
The values that are defined for a field are the values that are included in the filter. For example, if a filter is set up on the **Active Status** field in the employee table and the value A is defined, the filter will block out all employees who are not flagged as active employees.

**EXAMPLE:** An EmpowerTime user is permitted to view only the records of employees assigned to department 100. A filter is established on the user’s ID with the field **D_LEVEL1** selected. A distinct value of 100 is defined as an **Exact Match**, indicating that the user ID should only have permission to view records assigned to that value.

Multiple field value filters may be established within any one filter. To define multiple field values on which to filter, simply select a new field from the left pane after defining the first field value. As multiple field values are defined, use the **View Summary** button to review the filters that have been established.

**TIP:** When setting up filters containing multiple field values, set up and test each field value one at a time before returning to the filter and defining additional field values. Over-filtering may cause all data to be filtered out, so be sure to test each filter extensively to ensure that the correct data is displayed. If you encounter problems while defining field values, try toggling between the different options under **Search Type**.

To remove a field value from a filter, click in the **Selected** window and double-click the appropriate field. Once a filter has been set up, click the **OK** button to exit the filter window. Be sure to test the filter to ensure that only the desired data is viewable.

**TIP:** The User Setup section includes a filter testing utility. For more information on this utility, see Chapter 11—User Setup.

### 19.10 Modifying Grids

Many screens in EmpowerTime display information in a grid format, and many of these grids can be modified so that only columns of relevant information are displayed. Grids may be customized differently for different users. Some of the commonly used screens that contain modifiable grids include the Timecard, Schedule, and Attendance screens in the Employee section. All modifiable grids include a small button in the upper-left corner shaped like a pair of pliers. The fields available will vary depending on the grid to be modified.

To modify a grid, simply click on this button. The Grid Fields Format window, shown in the figure below, displays all available columns for the selected grid. Check marks indicate the columns already displayed in the grid. To remove a column from a grid, uncheck the box corresponding to the appropriate heading. To add a column to a grid, check the box corresponding to the appropriate heading. Some column headers are listed as they appear in the corresponding EmpowerTime table. To change the label of a column header, change the value displayed in the caption column.
The order in which column headers are displayed from left to right can also be modified. To change the order of columns in a grid, use the up and down arrow buttons in the Grid Setup window.

19.11 Customizing the Program Menu

The Programs drop-down menu is used to link external applications into the EmpowerTime user interface. Commonly linked applications include HR imports, payroll exports, and data collection applications. To customize the Programs drop-down menu, click on Programs à Customize Toolbar.
Applications can be added to the drop-down menu by clicking the **Add** button on the right.

![Program Properties](image)

**Program**
Displays the name and path of the selected program.

**Title**
Displays the title that appears on the button in the program toolbar.

**Hint**
Displays the pop-up hint that appears when the mouse pointer hovers over the program button.

**Command Line**
Displays any command line options to be executed when the program is launched through the program button.

**EmpowerTime Interface**
Indicates whether or not the selected program is an EmpowerTime interface module. When selected, the **Pass User ID** option is enabled. This option is primarily used with the EmpowerTime to disable the server and client prompts that normally appear when an interface module is launched.

**Pass User ID**
Indicates whether or not the ID and password of the user currently logged into EmpowerTime.
should be automatically passed to the corresponding program when it is launched through the program toolbar.

**Run on Startup**
Indicates whether or not the program should automatically launch when EmpowerTime is started. When selected, the **Startup Command Line** option is enabled.

**Startup Command Line**
Displays any command line options to be executed when the program is automatically launched upon startup. Note that the **Run On Startup** option must be checked to enable this option. Command line options are described later in this chapter.

**Adding Other Programs to the Program Toolbar**
To add shortcut buttons for other programs on the program toolbar, open the Customize Toolbar window and click the **Add Other** button. In the Program Properties window, shown in the figure below, click on the browse button along the right edge of the **Program** field and locate the executable to be added to the program toolbar.

Once a program has been selected, the path and file name are displayed in the Program field. The **Title** and **Hint** fields are automatically populated with the program name, but these labels can be changed if necessary. Click the **Save** button to save the changes and return to the Customize Toolbar window.

**Removing Programs from the Program Toolbar**
To remove a program from the program toolbar, open the Customize Toolbar window and locate the desired program in the **Selected Programs** pane. Double-click the name of the program to move it to the **Available Programs** box, indicating that it has been removed from the toolbar. Click the **Save** button to save the changes.
CHAPTER 20—CHAPTER 20—
AUTOMATION

20.1 Overview

Automation is a process through which basic EmpowerTime™ functions are activated at predefined times without user intervention. Commonly automated tasks include polling time clocks, posting punches, producing reports, and executing system maintenance processes. Automation decreases the amount of time users spend working in EmpowerTime and helps ensure that critical processes are executed on time.

Creating automated tasks involves several steps, and some steps differ depending on the type of tasks being automated. In order to automate functions within an EmpowerTime module—such as executing a time clock polling process or an employee import process—command line options must be used to create a batch file or an automated task. Then, an event scheduler must be configured to automatically execute the batch file or automated task at predefined times.

Automating functions within EmpowerTime—such as executing the posting process, system maintenance processes, or the production of reports—requires an extra step. First, a macro must be created within EmpowerTime using the macro builder. Next, command line options must be used to create a batch file or an automated task. Finally, an event scheduler must be configured to automatically execute the batch file or automated task at predefined times.

This chapter describes the setup procedures for both types of automated tasks.

WARNING: Automation can be very complex in some situations. Some types of automated tasks can be configured multiple ways, and the version of EmpowerTime and the EmpowerTime modules in use can affect automation. This chapter is intended only to provide a broad overview of automation. Contact Empower Software Solutions Implementation Services for assistance with configuring automated tasks.

20.2 Command Line Options

Command line options are sets of instructions that define the functions to be performed by automated tasks. Command line options are typically entered into batch files, which are then scheduled to execute at predetermined times through an event scheduler. However, some event schedulers can execute command line options without using batch files. Regardless of the method of execution, command line option parameters do not change.

Command line options are used to execute functions in EmpowerTime modules such as employee import and time clock communication modules. To view the command line options available for use with EmpowerTime or an EmpowerTime module, open the desired program and select Command Line Options from the Help drop-down menu.
The command line options and syntax are displayed in a window as shown in the following figure. Different modules contain different command line options.

**Figure 211: Command Line Options**

**TIP:** Command line options are available in all EmpowerTime modules that can be automated. For example, time clock communication modules can be automated to communicate with time clocks at specific times, and employee import modules can be automated to import employee records at specific times. Payroll export modules cannot be automated.

**Command Line Options for EmpowerTime Macros**

Macros are set up in EmpowerTime in order to automate tasks such as executing the posting process, system maintenance processes, or the production of reports. Command line options are used to open the EmpowerTime application and execute these types of macros at predefined times. In most cases, command line options reside in batch files, which are scheduled for automatic execution using an event scheduler.

The standard command line option syntax for EmpowerTime macros is listed below, and the individual components are described below as well.

```
empowertime [-u [user ID]] [-p [password]] [-m [macro name]]
[-c [company code]] [-s [server name]] [-l [client name]] [options]
```

**TIP:** The brackets are provided as a visual reference and are not used when writing command line options.

```
empowertime
```

Represents the name of the application executable, which is `empowertime.exe`. Note that the three character file extension, EXE, is not required.

```
–u [user ID]
```

Represents the user ID for logging on to EmpowerTime.
Represents the user ID that will be used to launch EmpowerTime prior to executing the macro. The Master user ID is typically used, but any valid EmpowerTime user ID will work.

`–p [password]`
Represents the password for the user ID that will be used to launch EmpowerTime.

`–m [macro name]`
Represents the name or code of the macro to be executed after EmpowerTime is launched. A macro code must be entered each time a new macro is created in EmpowerTime.

`–c [company code]`
Represents the three character code of the company. Company codes are displayed in the lower left corner of the EmpowerTime window.

`–s [server name]`
Represents the name of the EmpowerTime SQL server.

`–l [client name]`
Represents the client name for the SQL server.

[options]
Represents any additional options to be executed during the macro session.

**Command Line Options for EmpowerTime Modules**

**EXAMPLE:** A macro named *daily* has been set up in the company *XYZ*. The user ID that will be used to launch EmpowerTime and execute the macro is *Joe*, and the password for this user ID is *smith*. In addition, two options are necessary for this macro: one to disable the toolbar and one to automatically run the full posting process after logging in. The correct command line option syntax for this situation is as follows:

```
empowertime –ujoe –psmith –mdaily –xyz –d –f
```

Macros are not necessary to automate the execution of functions in EmpowerTime modules such as time clock communication and employee import modules. Instead, these types of automated tasks can be entirely set up using command line options. In most cases, command line options reside in batch files, which are scheduled for automatic execution using an event scheduler.

The standard command line option syntax for EmpowerTime modules is listed below, and the individual components are described below as well. The syntax for EmpowerTime modules is very similar to the syntax for EmpowerTime macros. However, note that the exact syntax can vary from module to module.

`executable [–c [company code]] [–s [server name] [–l [client name]]] [function type] [options]`

**TIP:** The brackets are provided as a visual reference and are not used when writing command lines.
Represents the name of the application executable. Note that the three character file extension, EXE, is not required.

\[-c [company code]\]
Represents the three character code of the company. Company codes are displayed in the lower left corner of the EmpowerTime window.

\[-s [server name]\]
Represents the name of the EmpowerTime SQL server.

\[-l [client name]\]
Represents the client name for the SQL server.

\[function type\]
Defines the function to be executed after the module is launched.

\[options\]
Represents any additional options to be executed during the macro session.

**EXAMPLE:** An automated task is needed to open WinCom, a time clock communications module, and poll three modem time clocks for the company ABC. The time clock numbers assigned to these devices are 1, 2, and 3. The correct command line option syntax for this situation is as follows:

```
wincom -c abc d 1 2 3
```

**Batch Files and Event Schedulers**

Batch files are text files that contain command line options and that can be scheduled to execute at predefined times using an event scheduler. The process of creating batch files is not described here. For more information on batch files, consult an IT professional.

Many different event scheduling utilities are available for scheduling batch files, so the process of configuring event scheduling utilities is not described here. For more information, consult the documentation included with your event scheduling utility.

**WARNING:** Empower Software Solutions does not support batch files or third-party event scheduling utilities.
CHAPTER 21—CHAPTER 21—SECURITY SETTINGS

21.1 Overview

EmpowerTime™ has incorporated a robust set of security enhancements that will greatly improve the security of EmpowerTime data. This chapter describes the personal configuration process for users as well as the system configuration process for administrators. These settings are configured in the User Security Settings section accessible from the Rules Setup drop-down menu.

21.2 Configuring User Security Settings

To configure EmpowerTime logon settings, go to Rules Setup → User Security Settings → Security Settings. This screen allows administrators to configure a variety of settings such as password format, IP restrictions, and number of security questions. The fields on this screen are described below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password Expire Due Days</td>
<td>90</td>
</tr>
</tbody>
</table>

The Password Expire Due Days field determines how frequently users are required to change their password. Users can change their password at any time before the system expires their password, but they must do it before the end of this time period.

NOTE: EmpowerTime will not allow users to reuse any password they’ve already used, no matter how long ago the password was used. Each new password must be unique.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warning Days</td>
<td>5</td>
</tr>
</tbody>
</table>

If passwords have been set to expire, you can configure EmpowerTime to begin warning users a certain number of days before the expiration date. Users will receive a notice warning them about the upcoming required password reset when they log on to EmpowerTime.

Password Format: `[a-zA-Z0-9@#$%^&*()]`

User passwords can be formatted to require a minimum length and number of specific character types. To configure the password format requirements, click the browse button to the right of the Password Format field. The Create Format fields will display on the right side of the Security Settings screen, as shown in the following figure.
Specify a minimum length for the password as well as the minimum number of upper and lower case letters, special characters, and numerals by entering the number in the appropriate field. Any field set to zero will not set a requirement for that category. Click Create Format String to populate the Password Format field with the code string required by EmpowerTime. Click Close to hide the Create Format section.

The Password Format Message field allows you to enter a message to users describing the password requirements. This message will display to users when they enter a password that does not meet the requirements.

**NOTE:** The message content must be updated manually to reflect the settings configured in the other fields. EmpowerTime does not automatically update the content of the Password Format Message field when the other fields have been edited.

To restrict the number of times a user can enter an incorrect password, enter a number in the **Maximum Failed Attempts** field. Once a user meets that number of failed attempts, EmpowerTime will lock them out of the system and prevent them from attempting to log on for a specified length of time or until a manager unlocks the account.

To configure the length of time a user will be locked out of EmpowerTime after the maximum number of failed attempts, enter the length of time in minutes in the **Account Locking Time** field. Managers can bypass this time for users by unlocking the account on the User Setup screen.

When users are unable to remember their password, they can reset their passwords by answering a series of security questions. You can require a specific number of security questions by configuring the **Required Question Count** field. For more information about configuring security questions, refer to the Configuring Security Questions section later in this chapter.
When a user gets locked out of EmpowerTime, the system can send an e-mail to a specified address with a notification that the account has exceeded the maximum number of failed attempts.

Access to EmpowerTime can be restricted by IP address. To turn on this feature, check the IP Checking box. In the IP String field, you can enter specific IP addresses or IP strings with wildcards. Refer to the examples shown on the screen for different ways to format this field.

NOTE: Users signing in from a new IP address will be asked the configured security questions before they will be allowed access to EmpowerTime.

### 21.3 Configuring Security Questions

To configure the security questions available to users, go to **Rules Setup à User Security Settings à Security Questions**. New questions can be added to the list by clicking the Add button in the lower right corner. Questions cannot be edited or deleted once they’ve been created, but they do not have to be used.

To make a question available to users, check the appropriate box in the Questions column.

**REMINDER:** If you have configured a minimum number of required security questions on the Security Questions screen, be sure to configure at least that many questions for users to select from.
21.4 New Users

New users are assigned temporary passwords when their accounts are created. If you are a new user logging on to EmpowerTime for the first time, you will be prompted to enter the temporary password.

You will then be prompted to reset the password to a new one that meets the requirements set up by the system administrator.

Depending on the password settings configured under Security Settings, the new password may be a combination of upper and lower case characters, special characters, and numbers.

After entering the temporary password and the new password and confirmation, click Save to move to the next screen.

You will then be required to set up a series of security questions. The available questions are generally configured by the system administrator, so you will get to select from a list of existing questions. The number of security questions required is determined by the settings configured in the Security Settings section.
NOTE: If you click Cancel at any point during this configuration process, you will not be allowed to access EmpowerTime.

### 21.5 Existing Users

If you are an existing user logging on to EmpowerTime for the first time after these security settings have been configured, you will receive a message explaining the security procedure.

The first step in updating the security settings is to change your password. Depending on the password settings configured under Security Settings, the new password may be a combination of upper and lower case characters, special characters, and numbers.
After entering the old password and the new password and confirmation, click **Save** to continue to the next screen.

You will then be required to set up a series of security questions. The available questions are generally configured by the system administrator, so you will get to select from a list of existing questions. The number of security questions required is determined by the settings in Security Settings.

![Questionnaire](image)

### 21.6 Forgotten Password

In the event you have forgotten your password, EmpowerTime will allow you to reset the password after answering the security questions you configured during the first logon. To access the security questions, enter your user name and click the **Forgot Your Password?** link on the logon screen.

![Forgot your password?] (image)

You will then be prompted to answer the configured security questions. Click **OK** when all of the required questions have been answered. If the answers have been entered correctly, the system will prompt you to enter a new password.

![Change Password](image)
CHAPTER 22—CHAPTER 22—GLOSSARY

Absence Reason Codes
Absence reason codes are used to specify the reason why an employee is absent on a scheduled workday. They are typically associated with pay records entered for absent employees, but they can also be linked to specific exceptions such as Tardy and Absent so that instances of those exceptions are associated with default reason codes. Absence reason codes are optional but can be useful for tracking attendance problems. Absence reason codes are defined in the Code Tables notebook.

Approvals
Approvals provide a way for supervisor-level users to mark employee records that have been reviewed and edited and are ready for payroll. Supervisors are typically responsible for approving employees’ hours, and payroll personnel are responsible for checking that all employees’ records have been approved before exporting data to payroll. Approvals can help minimize payroll errors and improve the lines of communication between supervisors and payroll personnel. Approvals are optional and may be enabled or disabled per pay class.

Attendance Plans
Attendance plans are optional rule sets that govern how employees use benefit hours like vacation and personal leave. The attendance plans to which employees are assigned function like banks of hours for specific pay types, ensuring that employees do not exceed the number of benefit hours they have earned. In addition, attendance plans can force EmpowerTime™ users to enter benefit hours in specific units, adhere to minimum limits, or adhere to maximum limits. Attendance plans are defined in the Attendance Plans notebook.

Audit Reason Codes
Audit reason codes are used to force EmpowerTime users to specify a reason each time that changes are made to employees’ punches. Audit reason codes are optional, but if enabled EmpowerTime always prompts users to select an audit reason code before accepting any timecard edits. Audit reason codes are defined in the Code Tables notebook.

Automation
Automation is a process through which basic EmpowerTime functions are activated at predefined times without a user being present. Commonly automated tasks include polling time clocks, posting punches, producing reports, and executing system maintenance processes. Some automated tasks must be set up using both an EmpowerTime macro and command line options, while other automated tasks require only command line options. Automation decreases the amount of time that users spend working in EmpowerTime and helps ensure that critical processes are executed on time.

Benefits Manager Module
Benefits Manager is an add-on module available with EmpowerTime. Benefits Manager tracks employees’ benefit accruals and performs calculations according to policies set
in Benefits Manager. With this module, attendance balances can be accrued and tracked entirely in EmpowerTime.

**Biometric Time Clocks**

Biometric time clocks provide the most accurate data collection solution available by ensuring that employees must be present in order to record a punch. Empower Software Solutions offers several different models of HandPunch biometric time clocks for different workplace environments. HandPunch time clocks scan the size and shape of employees’ hands to verify their identities each time they punch. No fingerprints or palm prints are utilized.

**Clock Supervisor Codes**

Clock supervisor codes are badge numbers assigned to supervisors who have permission to access advanced clock management functions at Accu-Time time clocks. Supervisor badge numbers are downloaded to time clocks during polling. When a clock supervisor badge is swiped at a time clock that contains that badge number, the clock is “unlocked” and normal restrictions are released for the next punch. Clock supervisor codes are defined in the Code Tables notebook.

**Code Tables**

Code tables are literally tables of the codes used in EmpowerTime such as job, shift, organization, absence reason, audit reason, and clock supervisor codes. Code tables are defined in the Code Tables notebook.

**Company**

A company is an organizational entity that is usually equivalent to a federal tax ID number. EmpowerTime can track an unlimited number of companies, keeping all information for each company in separate subdirectories. The sample company ZSI is automatically loaded with each installation of EmpowerTime.

**Company Setup**

Company Setup is a section accessible from the **Rules** menu. The options in the Company Setup section define the name of a company, the kind of pay period(s) used, and the organization level structure.

**Daily Activities**

Daily activities are tasks that one or more EmpowerTime users typically need to perform on a daily basis in order to ensure correct system performance from day to day. The activities that should be performed on a daily basis depend on the configuration of EmpowerTime, the distribution of responsibilities among EmpowerTime users, and the hardware devices and software modules installed with EmpowerTime. Common daily activities include adding and updating employee records, polling time clocks, posting punches, reviewing and editing timecards and pay records, reviewing reports, and backing up data.

**Employee Scheduler**

The Employee Scheduler is used for scheduling employees’ work shifts. The Employee Scheduler includes utilities for copying schedule templates over specific calendar dates, copying previous days or weeks of schedule, and entering schedules by hand. The Employee Scheduler is located under the Employees section.
Employee Import Modules
Employee import modules are add-on EmpowerTime modules that import employee
data from other business systems such as payroll or human resources systems, minimizing the amount of labor required to add new employees and update employee information. Employee import modules are typically installed in the EmpowerTime directory and accessed through the Programs menu.

End of Pay Period Activities
End of pay period activities are tasks that must be completed at the end of each pay cycle in order to ensure correct system performance from pay period to pay period. The activities that should be performed at the end of each pay cycle depend on the configuration of EmpowerTime, the distribution of responsibilities among EmpowerTime users, and the hardware devices and software modules installed with EmpowerTime. Common end of pay period activities include all daily activities as well as approving employees’ hours, exporting data to payroll, backing up data, and closing pay periods.

Error Classes
Error classes are groups of rules that define the exceptions EmpowerTime tracks for employees. Many different exceptions are available in EmpowerTime, and exceptions can be tracked differently for groups of employees. Error classes are defined in the Error Classes notebook.

Exceptions
Exceptions highlight non-standard activities and situations such as absences, tardies, long and short breaks, and missing punches. Exceptions are generated based on the error classes to which employees are assigned. Exceptions may be viewed on the screen or through a variety of reports, and exceptions from previous pay periods are archived in the Historian.

Historian
When the pay period closing process is run at the end of each payroll cycle, data from the oldest active pay period is purged to the EmpowerTime Historian. Data purged to the Historian cannot be modified but may be viewed either on the screen or through Historian reports. Timecards, payroll totals, exceptions, pay records, and attendance transactions from previous pay periods are all archived in the Historian. Users with permission to access the Historian may retrieve this information at any time.

Holiday Classes
Holiday classes define company-recognized holidays and the qualifiers employees must meet in order to receive automatic holiday pay. Once holiday classes have been created and assigned to employees, qualifying employees automatically receive pay records for holidays. Holiday classes are defined in the Holiday Classes section.

Hours
Hourly totals are calculated based on punch times, schedules (if applicable), and the rules established in EmpowerTime. In addition, some hours may be entered into EmpowerTime as pay records (e.g., vacation, PTO, and salaried hours).

Job Code
Job codes are hard-coded organization levels that are automatically set up in each company in EmpowerTime. Like other organization level codes, job codes can be useful for sorting and ranging reports, filtering employee information, and tracking labor. Although the job level cannot be renamed or deleted, it does not have to be used. However, if jobs are tracked then job codes must be defined in the Code Tables section.

**Macros**

Macros are one of the components required to automate EmpowerTime tasks such as executing the posting process, system maintenance processes, or the production of reports. Macros define the specific tasks within EmpowerTime that are to be performed, and macros are executed by command line options programmed into a batch file or an automated task. Macros are defined in the Activities section.

**Mass Updates**

Mass updates are used to quickly change multiple database records. Mass updates can be executed on any EmpowerTime table but are most commonly executed on the employee table. For example, a mass update could be used to assign a group of employees to a new job code or holiday class code without actually touching each employee record. Mass updates can also be used to mass add pay records or punches. Mass updates are extremely useful when creating employee records or making organizational changes.

**Missing Punch Edit Utility**

The Missing Punch Edit utility provides an easy way to identify and correct missing punches. Rather than displaying each employee’s complete timecard, the Missing Punch Edit utility only lists uncorrected missing punches. The Missing Punch Edit utility is in the Activities section.

**Notebook**

A notebook is a set of tabs or screens grouped together by category. For example, the Employee Setup section contains a number of different tabs including Timecards, Schedule, and Pay Records.

**Organization Levels and Codes**

Organization levels are logical groups used for organizing employees, tracking labor, filtering data, and sorting and ranging reports. Up to ten organization levels can be defined per company (not including job and shift, two additional but optional levels). The default EmpowerTime organization levels are division, location, and department. Organization levels are defined in the Company Setup section.

**Organizer Menu** (formerly Organizer Notebook)

The Organizer menu is one of two menu styles available in EmpowerTime. The Organizer menu includes links to every option available in EmpowerTime. Payroll administrators and power users are typically given permission to view the Organizer menu, while supervisors and occasional users are typically assigned to a supervisor menu.

**Pay Classes**

Pay classes are groups of rules that govern how EmpowerTime handles employees’ punches and hours. For instance, pay class rules determine how and when punches are rounded, which pay type codes are used in various situations, and the length of lunch
breaks. Multiple pay classes may be created for different groups of employees that are subject to different policies, but all active employees must be assigned to a pay class. Pay classes are defined in the Pay Classes section.

Pay Period
Pay periods define the frequency by which some or all employees in a company are paid. Five different kinds of pay periods can be defined in EmpowerTime: weekly, biweekly, semimonthly, monthly, and custom. Different groups of employees within a company can be assigned to different pay periods, but there can only be one instance of each kind of pay period per company. Pay periods are defined in the Company Setup section.

Pay Period Closing Process
The pay period closing process purges data from the current (oldest active) pay period and archives the data in the EmpowerTime Historian. Once a pay period has been closed, all punches, pay records, exceptions, total hours, and attendance transactions from that pay period can be viewed through the Historian but cannot be edited in any way. An external backup of the EmpowerTime directory should always be made prior to running the pay period closing process so that the pay period data may be restored at a later date if necessary. The pay period closing utility is located in the Activities section.

Pay Records
Pay records are hours or dollars transactions entered by an EmpowerTime user or automatically generated by the system. Pay records are not associated with start or stop times but rather are recorded as a total number of hours or dollars. Pay records are usually used to account for days of sick leave, vacation, personal leave, tips, or bonuses. In addition, EmpowerTime can be configured to automatically generate pay records for qualifying employees on company holidays. Pay records are entered on the Timecard screen in the Employee section.

Pay Types
Pay types are defined for every kind of pay that is tracked through EmpowerTime. Examples of commonly used pay types include regular, overtime, double overtime, vacation, sick, holiday, and personal leave. Pay types are defined in the Pay Types section.

Payroll Export Modules
Payroll export modules are add-on EmpowerTime modules that export payroll data to payroll systems or services at the end of each pay cycle, minimizing the amount of labor required to prepare payroll for processing. Payroll export modules are typically installed in the EmpowerTime directory and accessed through the program toolbar located above the Organizer menu.

PDA Punch
PDA Punch is a data collection and labor management module that operates on Palm OS-compatible PDAs. PDA Punch allows supervisors to capture simple In For Day and Out For Day punches, complex transfer punches, and pay records for non-worked hours such as days of vacation or personal leave. In addition, each transaction can be applied to an individual or a group of employees. PDA Punch is easy to use and can go
wherever work needs to be done, making it the ideal data-collection solution for employees on the move.

**Points Manager Module**

Points Manager is an add-on module available with EmpowerTime. Points Manager tracks employees’ attendance infractions, assigns values to those infractions, and determines penalties according to defined limits. Management can run reports on employees who have received penalties so that appropriate actions can be taken, and Points Manager can be configured to automatically e-mail supervisors when employees incur infractions. With Points Manager, attendance penalties can be tracked entirely through EmpowerTime.

**Polling**

Polling is the time clock communication process. Polling time clocks at least once per day ensures that time clocks do not run out of memory and that EmpowerTime is frequently updated with employees’ punches. Several different time clock communication modules are available for different models of time clocks.

**Posting**

Posting is a critical system process that recalculates employees’ punches and hours based on business rules. In addition, the posting process identifies exceptions and distributes newly polled punches to the appropriate timecards. The posting process should be executed at least one time per day in order to maintain current data and ensure that scheduling and pay rule changes take effect. The posting process may be executed by an EmpowerTime user or automated to execute at regular intervals. The posting utility is located in the Activities section.

**Program Toolbar**

The program toolbar located above the Organizer menu contains shortcut buttons that provide access to EmpowerTime modules such as employee import and payroll export modules. The program toolbar can be customized with different shortcut buttons on different users’ workstations.

**Punches**

Punches are transactions entered by employees at time clocks or through data collection modules. EmpowerTime accepts many different types of punches including In For Day, Out For Day, lunch, break, and transfer punches. However, in most cases employees only enter a few specific types of punches. Total hours are calculated based on punch times, schedules (if applicable), and the rules established in EmpowerTime.

**Rate Override Classes**

Rate override classes are groups of rules that assign different pay rates, pay types, pay factors, dollar amounts, and labor detail codes to employees’ hours when specific qualifiers are met. Rate overrides are commonly used to modify employees’ pay for working on certain shifts, jobs, or a combination of various qualifiers. Rate overrides are defined in the Rate Override Classes section.

**Rejected Punches**

Depending on the configuration of EmpowerTime and the type of data collection devices or programs in use, EmpowerTime may occasionally reject punches as invalid. A punch is typically rejected as invalid only if it is a duplicate punch or if it is associated
with a badge number or a labor detail code that does not exist in EmpowerTime. Rejected punches are saved in the Rejected Punch Maintenance utility, which is located in the Activities section. Rejected punches can be corrected and reposted to the appropriate employees’ timecards as long as they are corrected before the end of the pay period in which they occurred.

**Schedule Templates**
Schedule templates are an optional feature that may be used to quickly create employees’ schedules. Schedule templates define start and stop times on specific days for one or more weeks, and the schedules within a template are usually the same week to week. Employees are typically assigned to one or more default templates that reflect their standard work schedules, and the Employee Scheduler is used to copy the assigned templates over a specific period of time to produce multiple weeks of schedules for all employees. Schedule templates are defined in the Schedule Templates section.

**Shifts**
Shift is a hard-coded organization level that is automatically set up in every company in EmpowerTime. Like other organization level codes, shift codes are useful for sorting and ranging reports, filtering employee information, and tracking labor. Shift codes are also commonly used in conjunction with shift premiums and rate overrides. Although the shift level cannot be renamed or deleted, it does not have to be used. However, if shifts will be tracked then shift codes must be defined in the Code Tables notebook.

**Status Bar**
A status bar is always visible at the bottom of the EmpowerTime window. The status bar provides access to several actions and displays information such as the current company code and the user ID currently logged on to EmpowerTime.

**Supervisor Menus**
Supervisor menus are one of two menu styles available in EmpowerTime. Supervisor menus are designed for users who require only a limited level of access to EmpowerTime functions, reports, and records. Supervisor menus are completely customizable and may include any number of options, so each user who is set up to view a supervisor menu can have a unique set of menu choices. In addition to limiting system access, supervisor menus also simplify the training process for users.

**Tabs**
Tabs are individual screens or pages grouped together by category within a section of EmpowerTime. For example, the Employee Setup section contains a number of different tabs including Timecards, Schedule, Pay Records, and Attendance.

**Time Attendance Component**
The Time Attendance component displays current pay period data and provides a platform for viewing, editing, and processing that data. When the pay period closing process is run at the end of each payroll cycle, data from the oldest active pay period is purged to the EmpowerTime Historian. Data purged to the Historian cannot be modified but may be viewed either on the screen or through Historian reports.

**Time Clocks**
Time clocks are terminals that capture employees’ punches. Time clocks are available in Ethernet, modem, and direct-connect communication models, and weatherized enclosures are available for cold climates and industrial workplace environments. Empower Software Solutions also offers several models of biometric time clocks. Most time clock models support advanced functionality such as schedule restrictions, bell schedules, door access control, and job costing.

**User IDs and User Setup**

User IDs define the menu style, employee records, reports, and functions each user is permitted to access in EmpowerTime. A license must be purchased for each user or “seat” that accesses EmpowerTime. An EmpowerTime or network administrator should be responsible for creating and managing user IDs and permission levels. User IDs and permissions are defined in the User Setup notebook.

**Validation**

Validation is a feature that verifies the accuracy of the labor detail codes associated with punches and hours. Several different types of validation are available with most time clocks, and validation can also be enabled or disabled for each level within a company’s organization level structure. Invalid punches are rejected by EmpowerTime and are posted to the Rejected Punch Maintenance utility rather than to employees’ timecards.

**WebAdmin**

WebAdmin is a feature in WebEntry that provides access to EmpowerTime data, functions, and reports through an Internet browser. WebAdmin links directly to EmpowerTime and is designed for remote users who can’t access EmpowerTime across a local area network. WebAdmin can be deployed anywhere in the world an Internet connection is available.

**WebEntry**

WebEntry is an add-on module that collects employees’ punches and hourly segments through an Internet browser. Each employee enters a unique ID and password to access the program, and different employees can be given different levels of access. In addition, WebEntry also provides access to the personal reports included with WebESS. WebEntry links directly to EmpowerTime and can be deployed anywhere in the world an Internet connection is available.

**WebESS**

WebESS is an employee self-service feature in WebEntry that gives employees access to personal time and attendance reports. WebESS reports display information such as hours worked, allocation of hours, vacation and sick leave balances, and schedules. WebESS can be set up on individual workstations or a centrally located computer kiosk. WebESS links directly to EmpowerTime and can be deployed anywhere in the world an Internet connection is available. All WebESS reports are also included with the WebEntry data-collection module.

**WinCom**

WinCom is a time clock communications module used in conjunction with Accu-Time and Verifone model time clocks. WinCom downloads punches from time clocks and...
uploads information such as employee names, badge numbers, and validation codes (depending on time clock models and configuration settings).

**WinHand**
WinHand is a time clock communications module used in conjunction with HandPunch biometric time clocks. WinHand downloads punches from time clocks and uploads information such as employee names, badge numbers, biometric templates, and validation codes (depending on time clock models and configuration settings).

**WinPunch**
WinPunch is an add-on data collection module that functions like a workstation-based time clock. WinPunch is loaded on workstations around an office so that employees can record punches without using time clocks.

**ZSI**
ZSI is the code of the sample company included with EmpowerTime. ZSI data may be used for training new users, practicing critical processes, and testing new rules.