SCHEDULESOURCE

ScheduleSource TeamWork Enterprise Portal Guides
Part II Additional Modules
Policy Management Module
Version 1.0

Table of Contents

Chapter 1 - Introduction to Policy Management

Overview

Use the Policy Management module along with the Time & Attendance module to manage employee time, attendance, pay rates, shift differentials, and security. Policy management allows you to assign a policy to one or many employees. Create different management policies and apply them to distinct groups of employees or shifts. For example, you can create two separate policies that address overtime and apply one to exempt employees and the other to non-exempt employees. Establish specific pay rates and expense reimbursement for a variety of unique situations, including compliance with employee agreements and labor contracts.

All policies are date-based, so you have the flexibility of applying a time-related policy to an individual or a group of employees on a specific date as is needed. Keep in mind, however, that you can apply only ONE policy to an employee at ONE time.

Add new policies when ever you need them and include as many policy components as apply. If you do not need a policy component, simply do not include it.

Because policies are date-based, you can create a policy and have it in effect for the amount of time it is required such as a week, a month, a quarter, a semester, or even a year or more. Create another policy with a later effective date to replace a policy when it is no longer relevant. You can edit components to reflect changes in laws or employee agreements and simply assign a new Effective Date. A new version is automatically created with the new date in the version title.

Situations when the Policy Management module is especially useful include:

- Enforcing overtime calculations when a shift is split over midnight
- Enforcing a point system for attendance and employees who are repeatedly tardy
- Enforcing shift differentials
- Enforcing holiday pay
- Deploying different projects, tasks, and activities to different employees working in the same location

To gain an understanding of the Policy Management module and its parts, refer to the following diagram: Policy Management Module and Parts.

Building Policies

Policies are the foundation of the Policy Management module. You build them using the policy components you develop to meet your organizational requirements. This module is intentionally flexible and provides a way of setting rules and guidelines for every time-related regulation and contractual or governmental requirement your organization needs to comply with.

Before you build policies, take some time to put the building blocks in place, i.e., create policy components. Begin with establishing required Time Settings and then enter information for as many optional policy components as you need. Each policy component can have multiple versions that address various aspects of a policy component. Complete the information in as many windows for as many policy components as you need to address the environmental considerations you require for managing time. Refer to the following diagram: Policy Management Workflow

Policy Components

The Policy Management module requires that you use the Time Settings policy component and enter the required setup information. In addition, you have the option of using a number of additional policy components. Refer to the following:

- Required Policy Component
- Optional Policy Components

Required Policy Component

Time Settings — requires you to set the rules for employee time entries. Policy Management time settings replace the location time settings, except for Auto Clock-Off settings. Specify whether Location Time Settings or Policy Time Settings are used in your organization.

If Policy Time Settings are used, you must specify employee time entry devices such as the Kiosk, Web Clock, or time card as well as other time-related information. This window is similar to the Setup Time & Rules window you configure in the Location section of the Enterprise portal when you configure time settings for the Time & Attendance module.

Remember: While Policy Time Settings can replace Location Time Settings, the Auto Clock-Off settings in the Location section Setup Time & Rules window are not replaced. Therefore, if your organization uses Auto Clock-Off settings at a Location, they still apply.

Important: Since you use Policy Management with the Time & Attendance module, the Time & Attendance module must be enabled before you can use Policy Management features. However, you can use the Time & Attendance module without using the Policy Management module.

Optional Policy Components

The following are optional policy components. You can use some or all of them in the policies you establish.

- **Employee Time Edit** — allows you to give an employee permission to edit their time.
- **Holiday Rules** — allows you to set up different holiday calendars for different locations.
- **Leave** — allows you to pay an employee a differential that is earned even when the employee is taking leave.
- **Overtime** — allows you to set up and enforce overtime rules for groups of employees. For example, include policy components that address exempt employees, state and federal Fair Labor Standards Act (FLSA) guidelines using either the location's address or employee's address, shift-based rules, or even custom rules such as contractual agreements.
- **Project, Task & Activities** — allows you to restrict the employee clock options so employees only see the projects, tasks, and activities assigned to them. This prevents employees from being able to clock to all projects in their location. In addition, the Station Time link allows you to select an option to use Station\Time Settings on the Project/Task/Activity policy component. You can also restrict a project/task from overtime.
- **Shift Based Overtime** — relates to shift differentials. Employees can be paid overtime for working more than a set number of shifts in a week, even if the hours are lower than the weekly or daily threshold for earning overtime.
- **Shift Differentials** — allows you to set shift differentials by day, shift times, and holidays. For example, you can configure the shift differential policy component to NOT pay both Shift

Differential and Overtime on the same shift. You can now configure the shift differential component to mark Overtime hours with the default differential (usually as Regular Hours).

- **Time Attendance** — allows you to set up a point system for attendance violations and tardiness.

Policy Management Configuration

When the Policy Management module is enabled, additional features display in the Organization section. To configure the module, go to **Roles > Enterprise** and select the user role that is responsible for Policy Management. Select **Organization** to display the available policy-related roles. See Role Definitions for Policy Management.

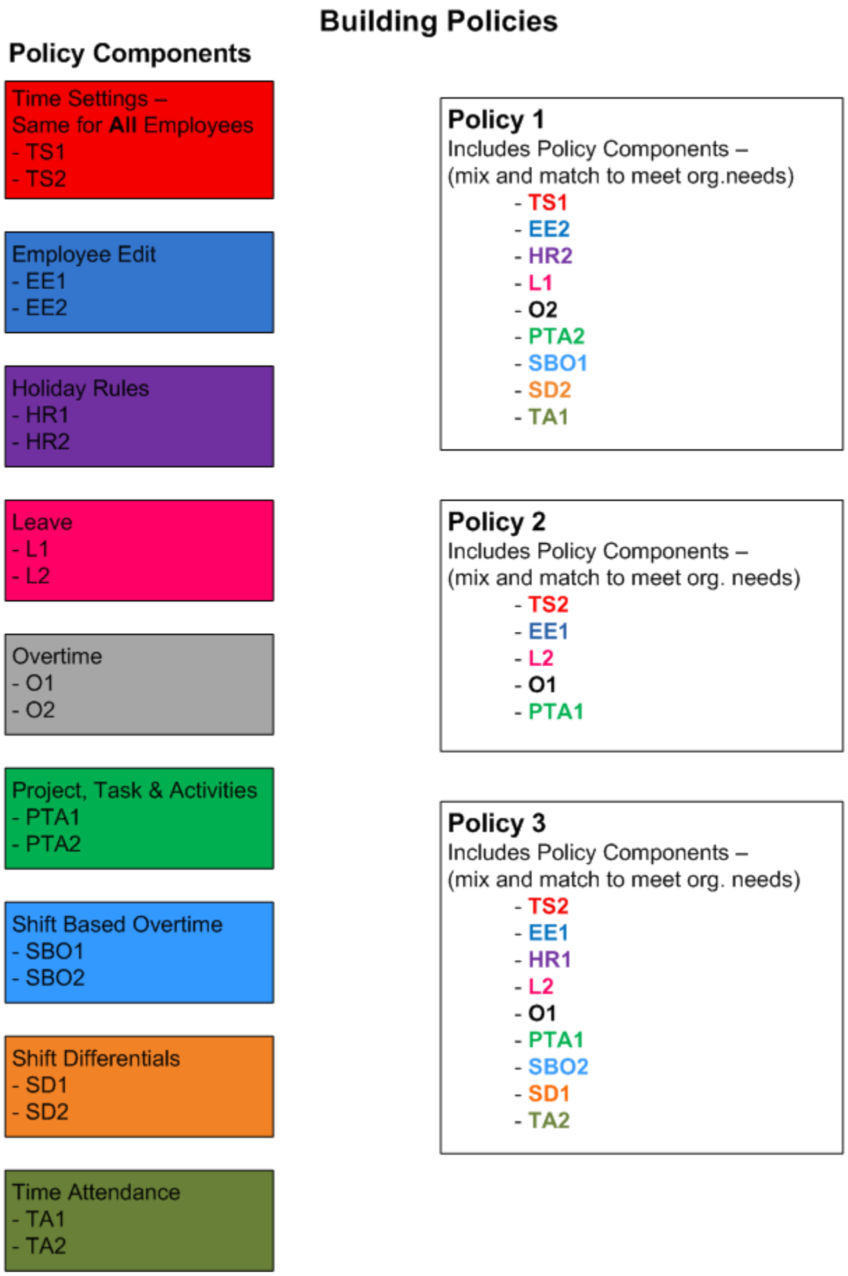
See Also

- Policy Management Module and Parts
- Understanding Policy Management
- How To's for Assigning a Policy to Employees
- How To's for Policy Components

Policy Management Module and Parts

The following diagram shows how the Policy Management module includes policy components as well as how policies can be configured to include some or all of the policy components you create.

Review the following example of building policies using policy components.



See Also

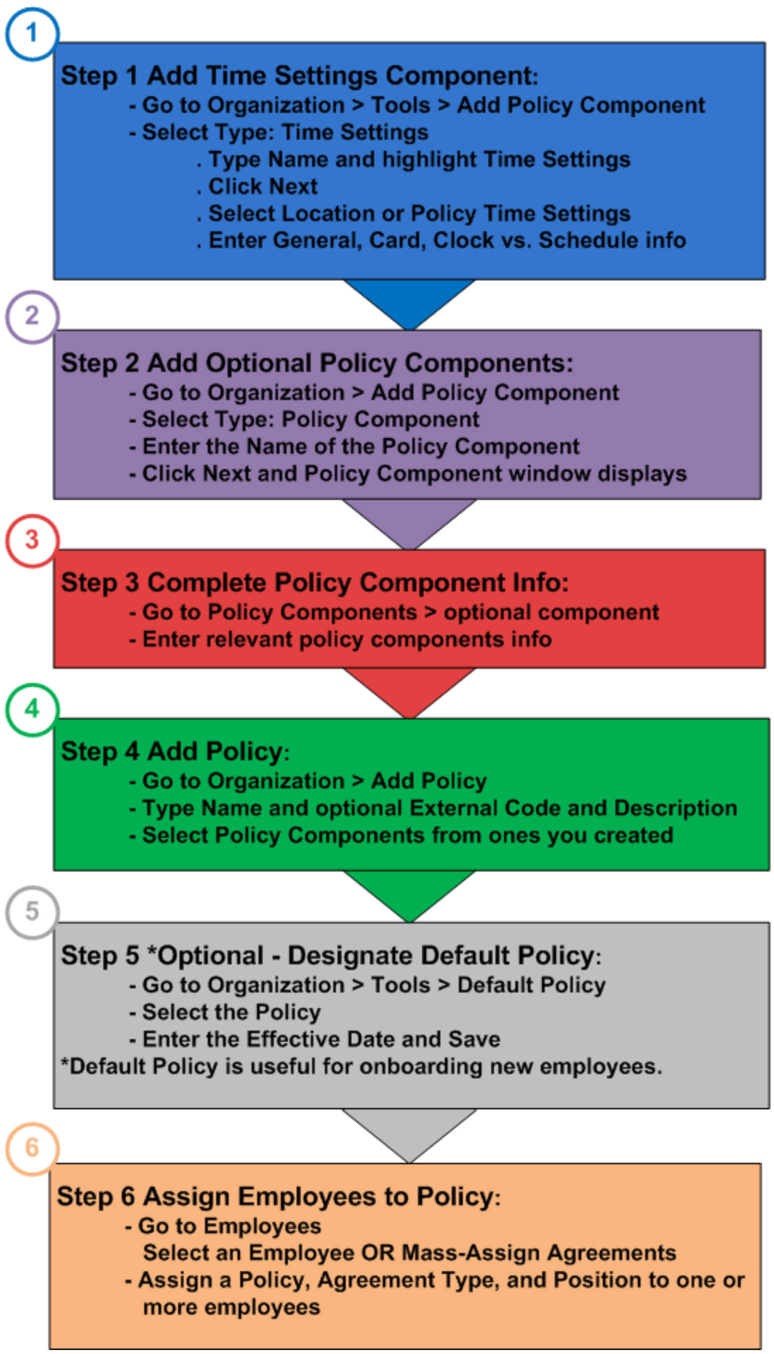
- Policy Management Workflow
- How To's for Policy Components

Policy Management Workflow

The Policy Management module uses time settings as well as the policy components you set up to create policies. Then you apply the policies to employees. The following How To's provide more detailed instructions:

- Overview of How To's for Policy Components
- Overview of How To's for Assigning a Policy to Employees

Refer to the following Policy Management Workflow.



Chapter 2 - Understanding Policy Management

Overview

When you add the Policy Management module to the Core Scheduling Package, additional windows display in the Enterprise portal in Organization, Employees, and Admin sections. There are also role definitions for Organization. See:

- Role Definitions for Policy Management
- Policy Management Windows

Role Definitions for Policy Management

When Policy Management is enabled, there are role definitions that apply in Enterprise portal. Since Policy Management is implemented in the Organization section, these roles display under Organization. Each action is described as follows.

Organization Section Access

Action	Permission description...
View Folders	allows viewing the organization folder structure – no editing.
Edit Folders	allows additions, edits, or deletions to the organization folder structure.
View Policies	allows viewing the organization policies structure - no editing.
Edit Policies	allows additions, edits, or deletions to the organization policies structure.
Edit Policy Component	allows additions, edits, or deletions to the organization policy component structure.
Manage Default Policy	allows additions, edits, or deletions to the organization default policy

Policy Management Windows

When the Policy Management module is enabled, you select the Organization section on the top menu and the related Policy Management tools, policies, and policy components display.

See the following Policy Management features:

- Tools
- Policies
- Policy Components

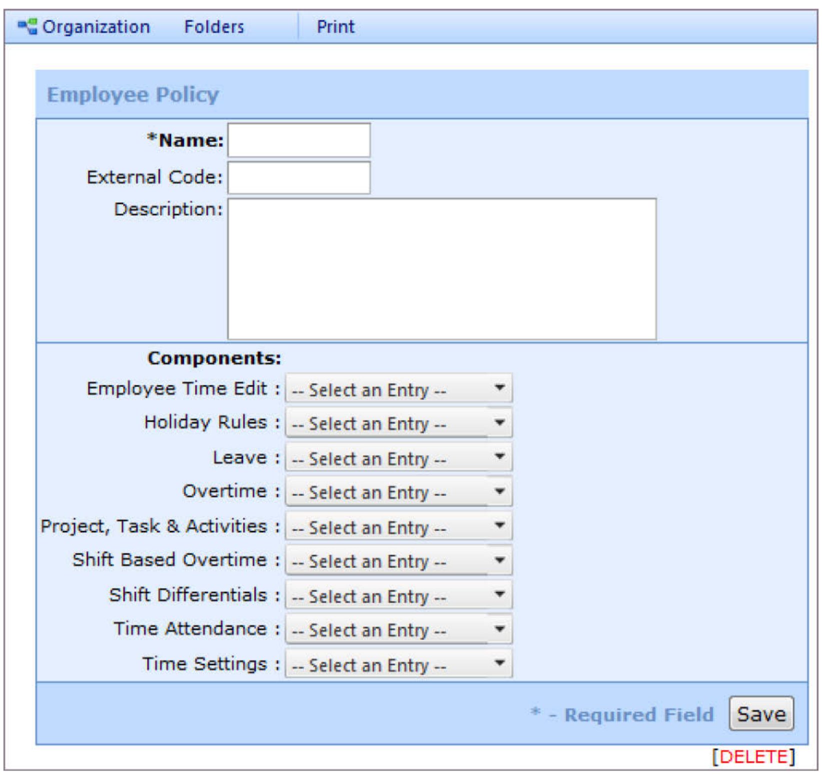
For More information, see How To's for Policy Components.

Tools

Use the Tools folder to create the building blocks you use in policies. Add Policy Components, then create a Policy and use those policy components in it. Designate a policy as the current default policy by selecting the policy and selecting the current Effective Date. Use the following tools:

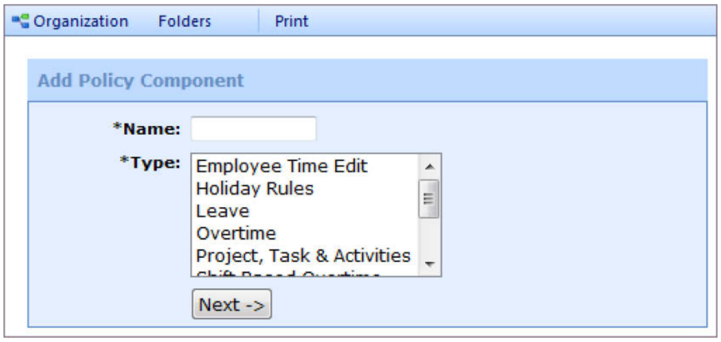
- Add Policy
- Add Policy Component
- Display or Change Default Policy

Add Policy



For more information, see Adding a Policy.

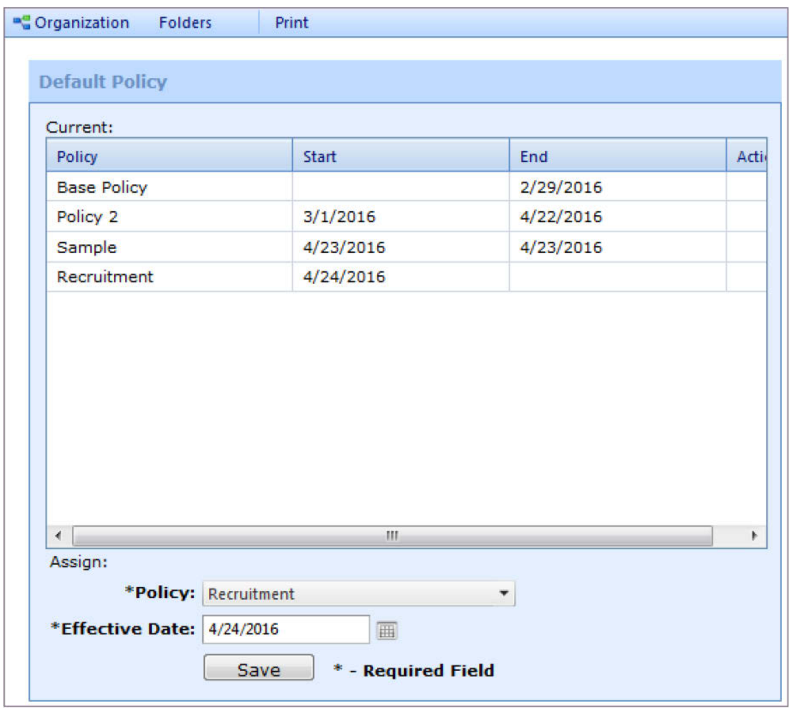
Add Policy Component



Note: Depending on which Type you select, when you select Next, the window related to the policy component you selected displays. See [Policy Components](#) for examples of those windows.

For more information, see [Adding a Policy Component](#).

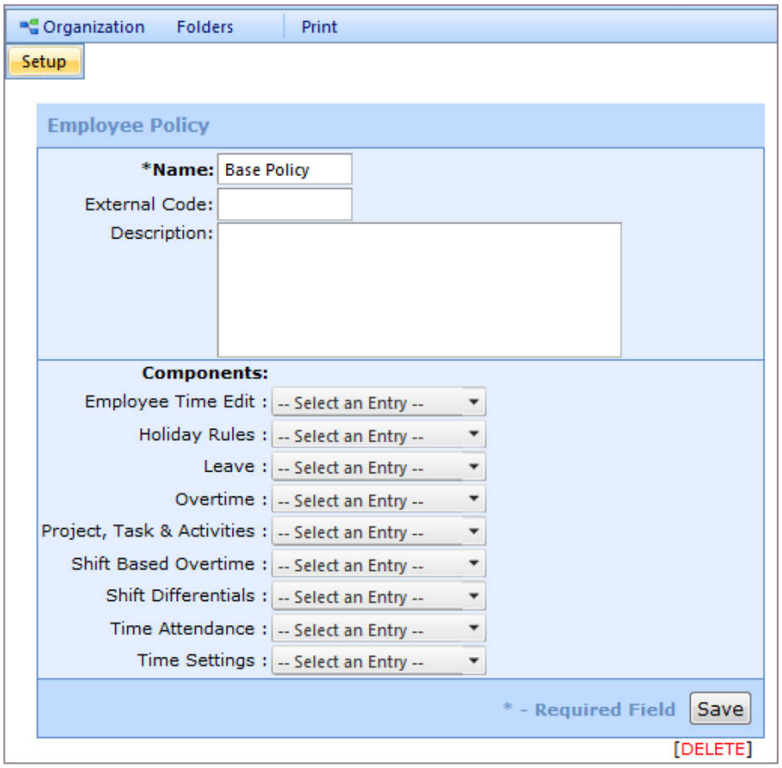
Default Policy



For more information, see [Designating a Default Policy](#).

Policies

Use the Policies folder to define the policy components that are included in a policy. You must select one Time Settings policy component, but all of the other policy components are optional.



For more information, see How To's for Existing Policies.

Policy Components

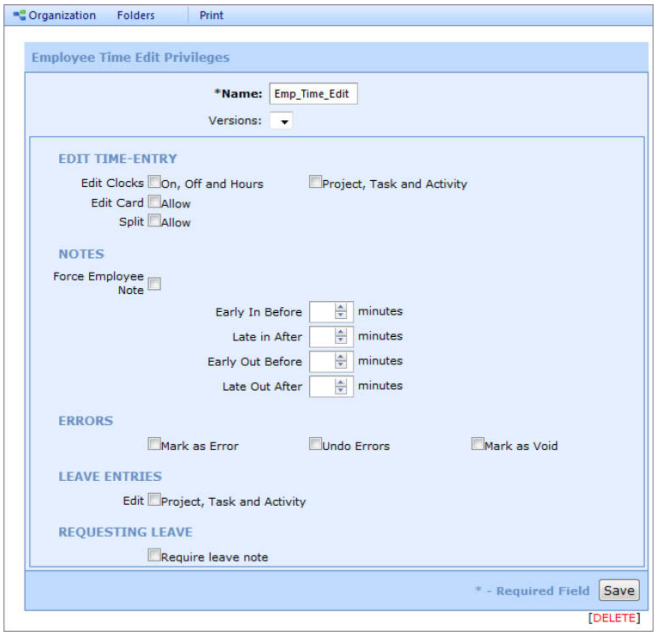
Use the Policy Components folder to define the policy components you want to use in policies. Establish as many as you need, and mix and match them as required in policies. Refer to the following window examples of Policy Components and related windows.

- Employee Time Edit
- Holiday Rules
- Leave
- Overtime
- Project, Task & Activity
- Shift Based Overtime
- Shift Differentials
- Time Attendance
- Time Settings

In addition, the following related Enterprise portal windows support the Policy Management module.

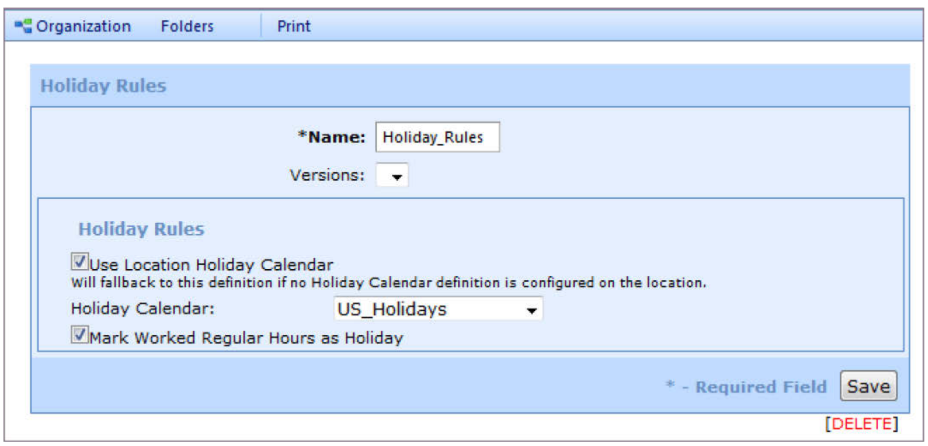
- Assign Employees Agreement
- Employee Agreement Type
- Employee Positions
- Holiday Calendars

Employee Time Edit



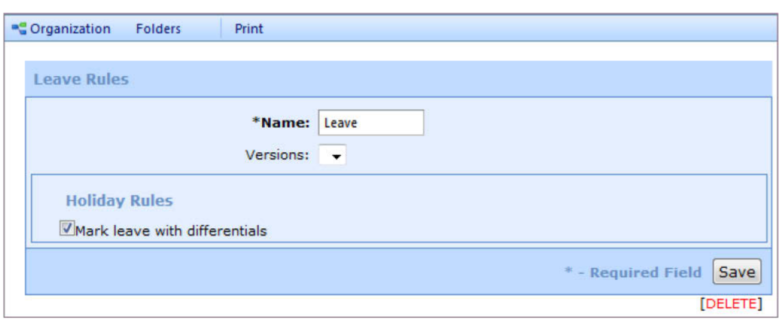
For more information, see Employee Time Edit

Holiday Rules



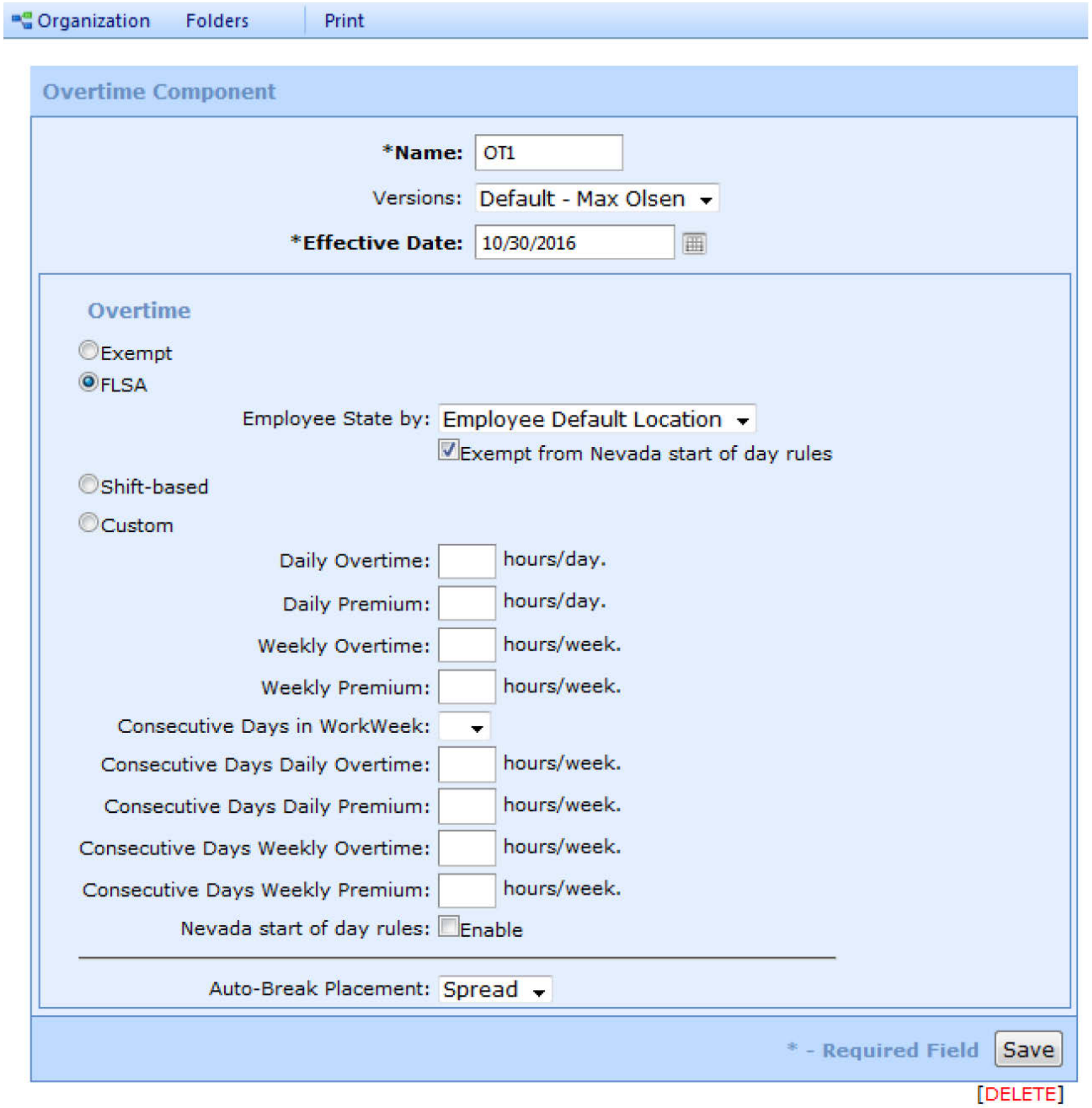
For more information, see Holiday Rules.

Leave



For more information, see Leave.

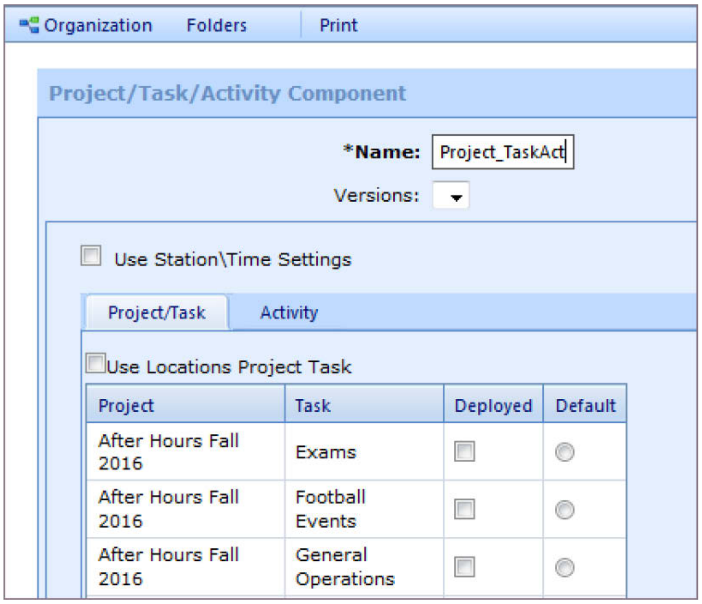
Overtime



For more information, see Overtime.

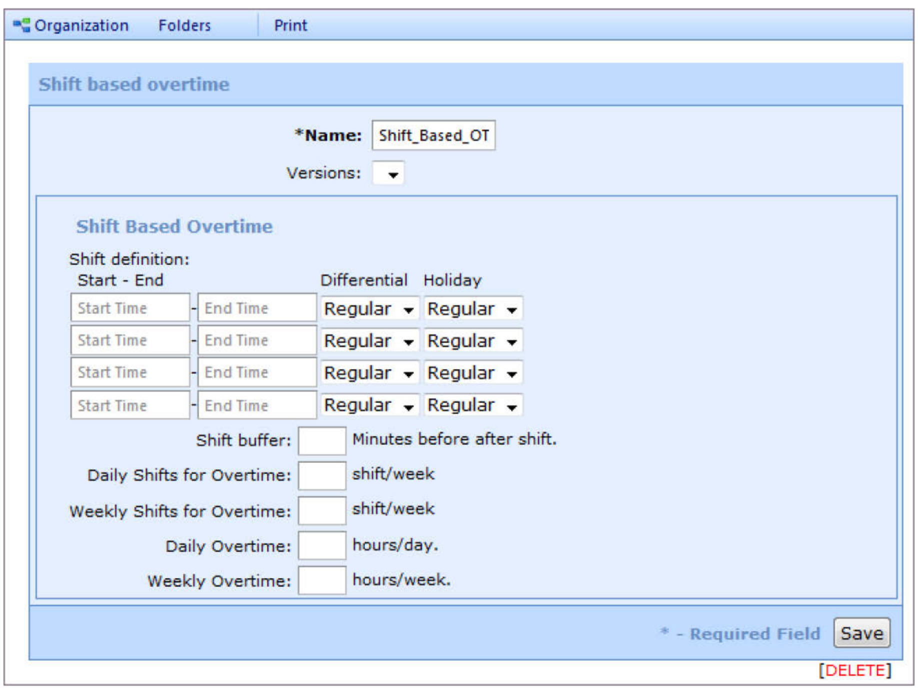
Note: There are two check boxes on the Overtime window that relate ONLY to Nevada employment rules and regulations. The default is to have overtime exempt from Nevada start of day rules. Unless your employees are affected by Nevada labor regulations, do not make changes to these default settings. Please feel free to contact ScheduleSource support if you have any questions.

Project, Task & Activity



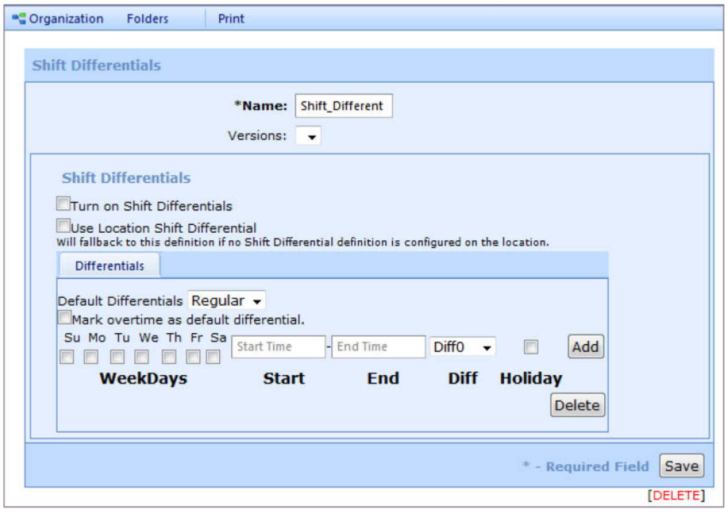
For more information, see Project, Tasks & Activities.

Shift Based Overtime



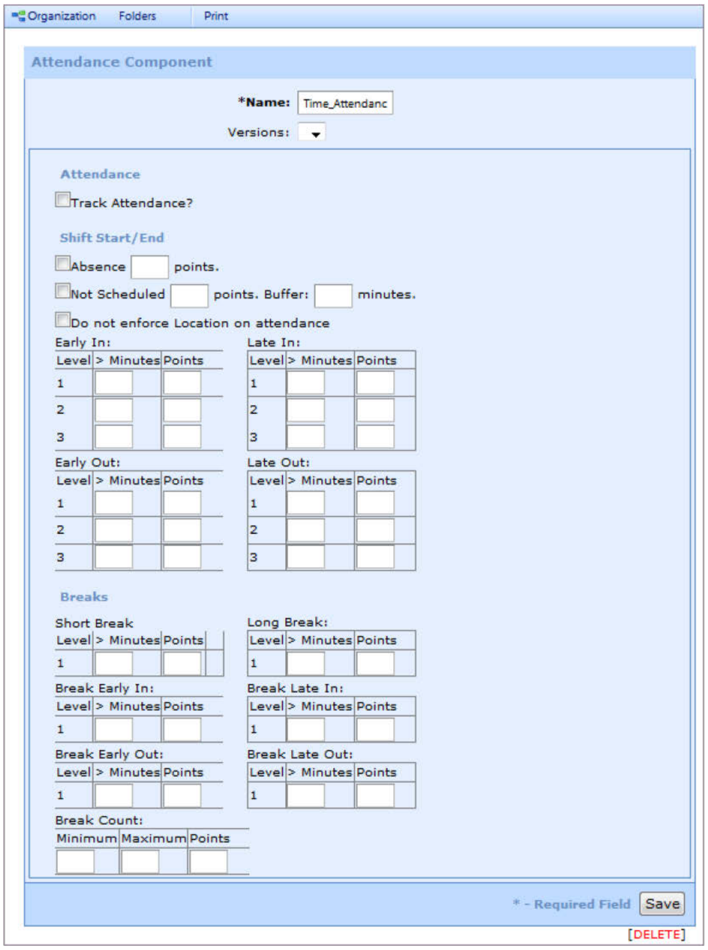
For more information, see Shift Based Overtime.

Shift Differentials



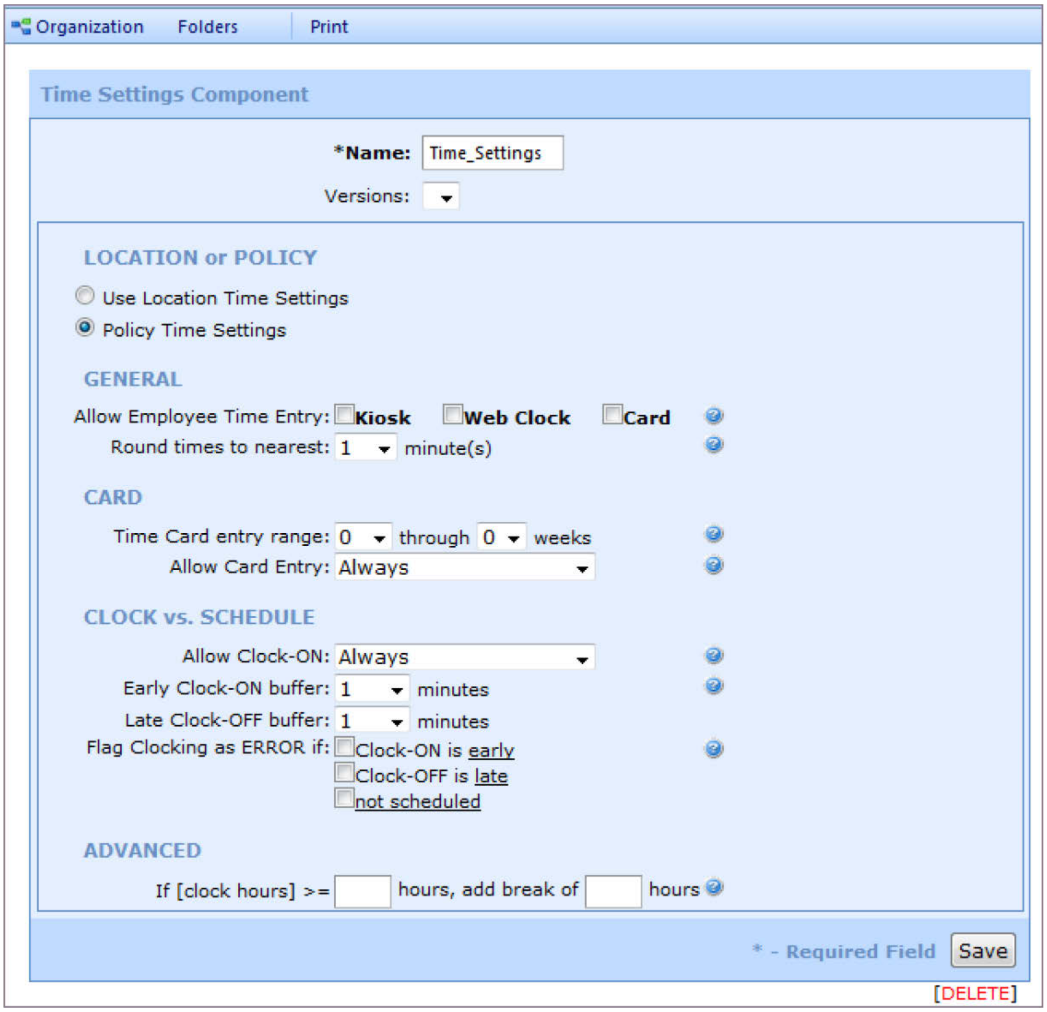
For more information, see Shift Differentials.

Time Attendance



For more information, see Time Attendance.

Time Settings

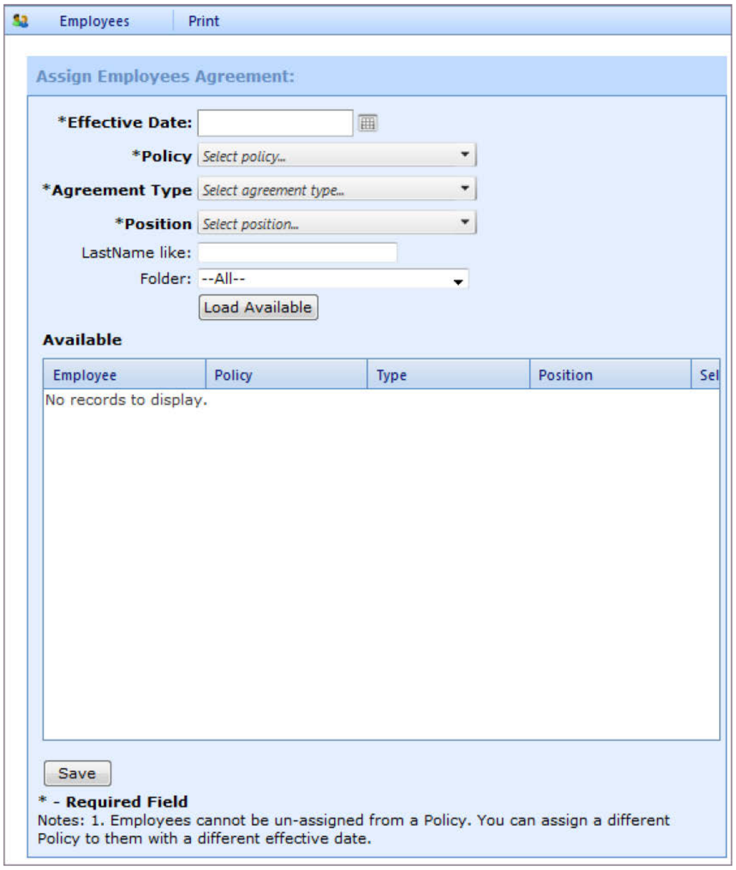


For more information, see Time Settings

Related Enterprise Portal Windows

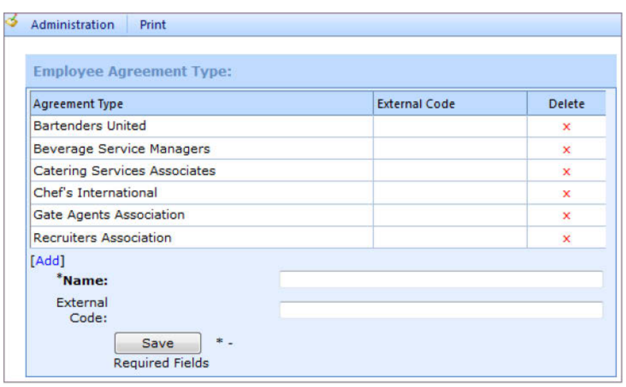
There are windows you use in the Policy Management module that display information entered in other sections of the Enterprise portal. You may use following windows as you perform Policy Management tasks.

Assign Employees Agreement



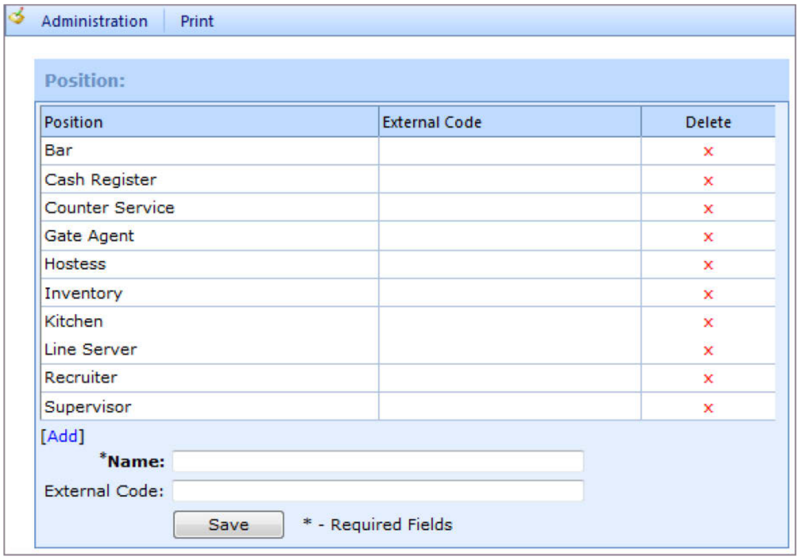
For more information, see Mass Assign Employee Agreements.

Employee Agreement Type



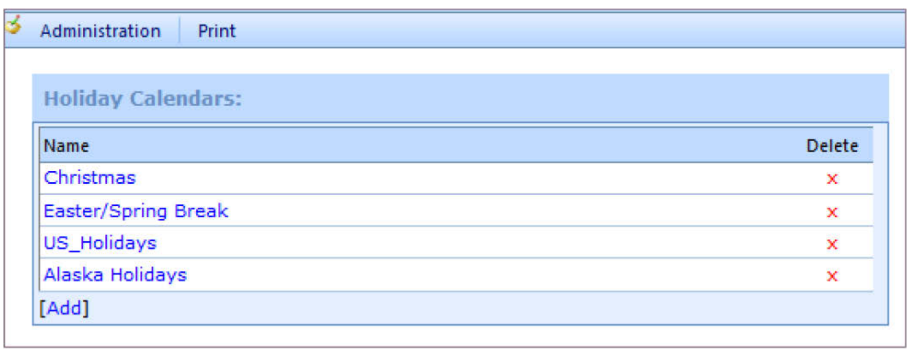
For more information, see Adding an Employee Agreement.

Employee Positions



For more information, see Adding an Employee Position.

Holiday Calendars



For more information, see Holiday Rules.

Chapter 3 - Tools for Policy Management

Overview

Several tools provide a way of quickly creating polices and policy components, as well as designating a default policy. Refer to the following tool descriptions.

- Add a Policy — Use this tool to launch an Employee Policy window, the window for adding a new policy. From the policy window, you can select the appropriate policy components. See Add a Policy Component and How To's for Policy Components.
- Add a Policy Component — Use this tool to launch an Add Policy Component window. Once you identify the type and select Next, the policy component window displays for your selection. These are the building blocks you use when you create a policy.
- Designate a Default Policy — Use this tool to designate a default policy. Select one of the policies you have already created and add an effective date.

Adding a Policy

Use Add Policy under Tools to add a new policy. Since you select the policy components you want included in the policy, go to Adding a Policy Component and add policy components first so you can use them in an employee policy.

To add a policy:

1. Go to **Organization** and under the Tools folder, select **Add Policy**.
   The Employee Policy window displays.
2. Enter the **Name** of the Policy.
3. Optionally enter an External Code and Description.
4. Select **Components** you want included in the new policy.
   Important: You must select a Time Settings component.
5. Select **Save**.

Adding a Policy Component

Use Add Policy Component under Tools to add a new policy component. You can add as many policy components in each component category as you need. If you do not need a policy component, simply skip that component. While you must enter a Time Settings policy component, it is not necessary to use all of the other optional policy components. For information on adding each type of component, see How To's for Policy Components.

To add a policy component:

1. Go to **Organization** and under the Tools folder, select **Add Policy Component**.
   The Add Policy Component window displays.
2. Enter the **Name** of the Policy Component.

3. Select the **Type** using the scrolling list.
   Important: You must create at least one Time Settings Policy Component.
4. Select **Next**.
   Policy Component window for the Type you selected displays.

   See Also:

   - Time Settings
   - Employee Time Edit
   - Holiday Rules
   - Leave
   - Overtime
   - Project, Task & Activities
   - Shift Based Overtime
   - Shift Differentials
   - Time Attendance

Designating a Default Policy

Use Default Policy under Tools to designate a Default Policy. While this is optional, it is especially helpful to use for new employees. A Default Policy is date-based and applies to all employees in the enterprise who do not have an assigned policy. Time is calculated against the default policy until a policy is assigned to the employee. See How To's for Assigning a Policy to Employees.

To add a default policy:

1. Go to **Organization** and under the Tools folder, select **Default Policy**.
   The Default Policy window displays a list of all current policies.
2. Under Assign, select the **Policy** that you designate as default using the drop-down list.
3. Select an Effective Date using the calendar.
4. Select **Save**.
   The policy you selected becomes the default policy.

Chapter 4 - How To's for Existing Policies

Overview

There are several tasks you can perform using policies you have already created. They are:

- Editing a Policy —edit the name of a policy you have already created, as well as the External Code and Description. You can add new policy components, but you cannot edit existing components.
- Deleting a Policy — delete a policy if it has not been assigned to an Employee.

To edit a policy:

1. Go to **Organization** and under the Policies folder, select the policy you would like to edit. The Employee Policy window displays and lists policy components.
2. Edit the **Name** of the Policy.
3. Optionally edit the External Code and Description.
4. Select additional **Components** you want included in the policy.
   Note: You can select additional policy components, but you cannot edit the policy components you have already selected.
5. Select **Save**.

To delete a policy:

1. Go to **Organization** and under the Policies folder, select the policy you would like to delete. The Employee Policy window displays.
2. Select [DELETE].
   Window prompts: Delete this Policy?
   Note: If the Policy has been assigned to an Employee, it cannot be deleted.
3. Select **OK** to delete the policy.

   Caution: You cannot delete a policy that has ever been used. This is a safeguard because you may need to go back to the policy at a later time and use the old policy to generate the same results as were received at the time it was used. The Policy Management module ensures an accurate recalculation.

Chapter 5 - How To's for Assigning a Policy to Employees

Overview of How To’s for Assigning a Policy to Employees

There are several ways to assign a policy to an employee or employees. If you are assigning a policy to one employee, go to the employee information window. If you are assigning a policy to multiple employees, use the mass assign tool.

The following are How To's for Assigning a policy to employees:

- Assigning a Policy to One Employee
- Mass Assign Employee Agreements
- Employee Agreements
- Employee Positions

Note: We encourage you to contact ScheduleSource support for assistance mass assigning policies.

Assigning a Policy to One Employee

Use the Employees folder under the Employees section to add a policy, agreement, and position to one employee. Once the Policy Management module is enabled, policy, agreement, and position information displays in the Agreements window in Employee Information. In addition, two Lists are added in the Admin section: Employee Agreements and Employee Positions. Once you establish policies and define employee agreements and employee positions, you can assign them to employees. The workflow is as follows:

- Go to Admin > Lists and set up Employee Agreements. See Adding an Employee Agreement.
- Go to Admin > Lists and set up Employee Positions. See Adding an Employee Position.
- Go to Organization > Tools > Add Policy. See Adding a Policy.

To add a policy, agreement, and position to one employee:

1. Click the **Employees** link on the top menu.
2. On the left navigation under Employees, click **Employee Name.**
   Employee information window displays.
3. Select the **Agreements** tab on the right navigation bar.
   Agreements window displays for selected employee.
4. Click **Add New Employee Agreement**.
   Add New Employee Agreements window displays.
5. Enter the **Effective Date**, select the **Policy**, **Agreement Type** and the **Position**. Click **Add**.
6. To view the agreements for an employee, on the left navigation under Tools, select the employee.

7. Click the **Agreements** tab.
   Employee Agreements display.

Mass Assign Employee Agreements

Use the Tools folder under the Employees section to add a policy, agreement, and position to multiple employees. Once the Policy Management module is enabled, policy, agreement, and position information displays in the Assign Employees Agreement window. In addition, two Lists are added in the Admin section: Employee Agreements and Employee Positions. Once you establish policies and define employee agreements and employee positions, you can assign them to employees. The workflow is as follows:

- Go to Admin > Lists and set up Employee Agreements. See Adding an Employee Agreement.
- Go to Admin > Lists and set up Employee Positions. See Adding an Employee Position.
- Go to Organization > Tools > Add Policy. See Adding a Policy.

To add a policy, agreement, and position to multiple employees:

1. Click the **Employees** link on the top menu.
2. To assign an agreement to multiple employees in a Folder, on the left navigation under Tools, click **Mass-Assign Agreements.**
   Assign Employees Agreement window displays.
3. On the Assign Employees Agreement window, select or enter an **Effective Date**.
4. Select a **Policy** using the drop-down list. See Adding a Policy.
5. Select an **Agreement Type** using the drop-down list. Go to Admin > Lists > Employee Agreements to add an employee agreements to the enterprise.
6. Select a **Position** using the drop-down list.
7. Select a **LastName like** to locate a specific employee. Use a **%** symbol to list all employees.
8. Click the **Folders** tab and select a Folder or leave the default as All.
9. Click **Load Available**.
   Available Employee Agreement information displays.
10. Select the check box under the **Sel**. column to select an employee or employees.
11. Click **Save**.

Adding an Employee Agreement

Use the Employee Agreements link under Lists in the Admin section of the Enterprise portal to enter Employee Agreements. You may then assign these agreements to specific Employees.

To add an Employee Agreement:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Employee Agreements.**
   Employee Agreement Type window displays in the right pane.
3. Click the **Add** link.
   Employee Agreement Type window expands to include entry fields.
4. Type the **Name**.

5. Click **Save**.
   Agreement Types are available in the drop-down list on the Add Employee Agreement form under Employees > Agreements.
   Note: You cannot edit an Employee Agreement Type, but you can delete it. To see an example of the window, go to Employee Agreement Type.

To delete an Employee Agreement:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Employee Positions.**
   Employee Agreement Type window displays in the right pane. Agreement Types are listed.
3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete Employee Agreement: name of agreement?
4. Click **OK**.

Adding an Employee Position

Use the Employee Positions link under Lists in the Admin section of the Enterprise portal to enter Employee Positions. You may then assign these positions to specific Employees.

To add an Employee Position:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Employee Positions.**
   Position window displays in the right pane.
3. Click the **Add** link.
   Position window expands to include entry fields.
4. Type the **Name**.
5. Click **Save**.
   Positions are available in the drop-down list on the Add Employee Agreement form under Employees > Agreements.
   Note: You cannot edit an Employee Position, but you can delete it. To see an example of the window, go to Employee Positions.

To delete an Employee Position:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Employee Positions.**
   Position window displays in the right pane. Employee Positions are listed.
3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete Employee Position: name of position?
4. Click **OK**.

Chapter 6 - How To's for Policy Components

Overview of How To’s for Policy Components

There are a number of policy components you can configure to address your time-related administration. If you do not need all policy components, do not use them. While Time Settings must be entered, all other policy components are optional. Simply use only the policy components that help you define and manage your policies.

Important: Policy component windows are flexible and useful for past reconstruction as well as the establishment of policies that implement a new bargaining agreement or changes in laws.

- Versions display in the policy component windows as a drop-down list. You are able to locate versions of the windows that were created six months or even years ago.
- You can also enter policy components and date them for the future.

The following are links to How To's for the policy components:

- Time Settings — Use this window to set rules for employee time entries.
  Remember: Time Settings is a required policy component. You must have Time Settings so that employees can enter their time.
- Employee Time Edit — Use this window to allow employees to edit their time-related entries.
- Holiday Rules — Use this window to set up different holiday calendars to different locations.
- Leave — Use this window to allow an employee to be paid a differential even when the employee is on leave.
- Overtime — Use this window to set up and enforce overtime rules for groups of employees.
- Project, Task & Activities — Use this window to restrict the employee clock options so employees only see the projects, tasks, and activities assigned to them.
- Shift Based Overtime — Use this window to allow an employee to be paid for overtime in a variety of situations including the number of daily and weekly shifts as well as the number of daily and weekly hours.
- Shift Differentials — Use this window to establish a number of shift differentials by day, shift times, and holidays so that an employee is paid appropriately for shift differentials as well as overtime.
- Time Attendance — Use this window to set up a system for tracking employee attendance, including absences, tardiness, and the abuse of break times.

Time Settings

Use the Time Settings folder under the Policy Components folder to set rules for employee time entries. This window replaces the Setup Time & Rules entries previously established for the location in the Locations folder with one exception: Auto Clock-Off rules remain the same. To be enabled, Auto Clock-Off must be set up in the Locations section under Time.

If you want different groups of employees to have different time entry criteria, set up a Time Settings policy component for each time entry criteria, use it in a policy, and assign it to the groups of employees who can use it.

Refer to the following How To's.

To create a Time Setting:

1. Go to **Organization > Tools** and select Add **Policy Component**.
   Policy Component window displays.
2. Type a **Name**, select **Time Settings**, and select **Next ->**.
   Time Settings window displays with the Name you provided.
3. On the Time Settings window, select the radio button for **Policy Time Settings**.
   Note: You also have the option of continuing to use Location Time Settings. If you select this option, the Time Settings Component window displays no additional fields.
4. Select the check boxes to **Allow Employee Time Entry**: Kiosk, Web Clock, and/or Card. This specifies how employees can enter time into the system. Kiosk and Web Clock allow for entering time in and out in real time. The Card allows manual entries, for both past and future time.
5. Select the **Round times to nearest** minute using the drop-down list. This rounds exact time stamps to the nearest minute specified and are used for hours calculations. Time card entry will allow times only on the rounded minute values.
6. If allowing Time card entry, select the **Time Card entry range** using the drop-down lists. This specifies the number of weeks before and after the current week in which employees can enter time.

   Important: The following **Clock vs. Schedule and Advanced** features apply only to Clocked time. They do not apply to Time card entries.
7. Enter **Clock vs. Schedule** options to conform to your organization's policies. They include when you allow employees to clock on and clock off, and when you flag clocking as an error.
8. Enter **Advanced** clocking options relative to Auto-Breaks to conform to your organization's policies.
9. Click **Save**.
   Versions automatically displays the name of the user who created the Time Settings Component and adds an Effective Date: today's date.

To edit a Time Setting:

1. Go to **Organization > Policy Components** folder and open the **Time Settings** folder.
   Time Settings policy components display.
2. Select the Time Setting you would like to edit.
   The Time Settings Component window displays.
3. Edit or add to existing time settings criteria.
4. Select **Save**.
   Time Settings Component window displays new version with a link for: Delete Version.

5. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
6. To delete and begin a new edit, select **OK**.
7. Make desired changes and select **Save**.

To delete a Time Setting:

1. Go to **Organization > Policy Components** folder and open the **Time Settings** folder.
   Time Settings policy components display.
2. Select the Time Setting you would like to delete.
   The Time Settings Component window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Employee Time Edit

Use the Employee Time Edit policy component to specify the methods employees can use to enter and optionally edit their time.

Refer to the following How To's.

To set up Employee Time Edit Privileges:

1. Go to **Organization > Tools** and select Add **Policy Component**.
   Policy Component window displays.
2. Type a **Name**, select **Employee Time Edit**, and select **Next ->**.
   Employee Time Edit Privileges window displays with the Name you provided.
3. Select the check boxes for fields under Edit Time-Entry that you want to allow employees to edit.
4. Select the **Force Employee Note** check box if you want to require employees to add a note.
5. Specify the number of minutes you consider for early in, late in, early out, and late out.
6. Select employee privileges regarding errors: Mark as Error, Undo Errors, and Mark as Void.
7. Select the check box to indicate whether employees can **Edit Project, Task and Activity**.
8. Select the check box to indicate whether you **Require leave note** when employees are requesting leave.
9. Select **Save**.
   Note: Versions automatically displays the name of the user who created the Employee Time Edit Privileges policy component and adds an Effective Date: today's date.

To edit Employee Time Edit Privileges:

1. Go to **Organization > Policy Components** folder and open the **Employee Time Edit** folder.
   Employee Time Edit policy components display.
2. Select the Employee Time Edit policy component you would like to edit.
   The Employee Time Edit Privileges window displays.
3. Edit or add to existing time settings criteria.
4. Select **Save**.
   Time Settings window displays new version with a link for: Delete Version.

5. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
6. To delete and begin a new edit, select **OK**.
7. Make desired changes and select **Save**.

To delete Employee Time Edit Privileges:

1. Go to **Organization > Policy Components** folder and open the **Employee Time Edit** folder.
   Employee Time Edit policy components display.
2. Select the Employee Time Edit policy component you would like to delete.
   The Employee Time Edit Privileges window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Holiday Rules

Use the Holiday Rules folder under the Policy Components folder to define Holiday Rules for your organization. Different locations can have different holidays. Once the Policy Management module is enabled, Holiday Calendars displays under Admin > Lists. You use it to define special days and include them in holiday calendars. Then you designate the appropriate holiday calendar in the Holiday Rules policy component. The workflow is as follows:

- Go to Admin > Lists and set up Special Days. See Special Days in Part I Core Scheduling Package.
- Go to Admin > Lists and set up Holiday Calendars. See Adding a Holiday Calendar.
- Go to Organization > Tools > Add Policy Component. See Adding a Policy Component.
- In the Holiday Rules policy component, select the Holiday Calendar.

Refer to the following How To's:

To add Holiday Rules:

1. Go to **Organization > Tools** and select **Add Policy Component**.
   Policy Component window displays.
2. Enter the **Name** of the Holiday Rule, select **Holiday Rules**, and select **Next ->**.
   The Holiday Rules window displays.
3. Select the check boxes under Holiday Rules that apply to this policy component.
4. Select a **Holiday Calendar** if desired.
5. Select **Save**.
   Note: Versions automatically displays the name of the user who created the Holiday Rules policy component and adds an Effective Date: today's date.

To edit a Holiday Rule:

1. Go to **Organization > Policy Components** and open the **Holiday Rules** folder.
   Holiday Rules policy components display.
2. Select the Holiday Rule you would like to edit.
   Holiday Rules window displays.

3. Make desired changes and select **Save**.
   Holiday Rules window displays new version with a link for: Delete Version.
4. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
5. To delete and begin a new edit, select **OK**.
6. Make desired changes and select **Save**.

To delete a Holiday Rule:

1. Go to **Organization > Policy Components** and open the **Holiday Rules** folder.
   Holiday Rules display.
2. Select the Holiday Rule you would like to delete.
   Holiday Rules policy components display.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

To add a Holiday Calendar:

1. Click the **Admin** link on the top menu.
2. On the left navigation under the Lists folder, click **Holiday Calendars.**
   Holiday Calendars window displays in the right pane.
3. Click the **Add** link.
   Holiday Calendar window displays.
4. Type the **Name**.
5. Select the check boxes of the Special Days to include.
6. Click **Save**.
   Note: You cannot edit a Holiday Calendar, but you can delete it. To see an example of the window, go to Holiday Calendars.

To delete a Holiday Calendar:

1. Click the **Admin** link on the top menu.
2. On the left navigation under Lists, click **Holiday Calendars.**
   Holiday Calendars window displays in the right pane. Holiday Calendars are listed.
3. Click on the **x** under the Delete column.
   Pop-up window prompts: Delete Holiday Calendar: x name?
4. Click **OK**.

Leave

Use the Leave folder under the Policy Components folder to define Leave for your organization. Of particular interest is whether or not you mark leave with differentials to be used in conjunction with holiday rules.

Refer to the following How To's.

To set up Leave Rules:

1. Go to **Organization > Tools** and select **Add Policy Component**.
   Policy Component window displays.
2. Enter the **Name** of the Leave Rule, select **Leave**, and select **Next ->**.
   The Leave Rules window displays.
3. Select the check box for **Mark leave with differentials** if you want to pay an employee a differential that is earned even when the employee is taking leave.
4. Select **Save**.
   Note: Versions automatically displays the name of the user who created the Leave Rules policy component and adds an Effective Date: today's date.

To edit Leave Rules:

1. Go to **Organization > Policy Components** and open the **Leave** folder.
   Leave policy components display.
2. Select the Leave Rule you would like to edit.
   Leave Rules window displays.
3. Make desired changes and select **Save**.
   Leave Rules window displays new version with a link for: Delete Version.
4. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
5. To delete and begin a new edit, select **OK**.
6. Make desired changes and select **Save**.

To delete Leave Rules:

1. Go to **Organization > Policy Components** folder and open the **Leave** folder.
   Leave policy components display.
2. Select the Leave Rule you would like to delete.
   The Leave Rules window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Overtime

Use the Overtime folder under the Policy Components folder to define all situations in which overtime will be paid or is exempt. Use this component to enforce overtime calculations when a shift is split over midnight and to specify the situations in which overtime is paid. Identify employee state by location or employee address, thereby ensuring state and federal Fair Labor Standards Act (FLSA) guidelines are adhered to. Modify Overtime policy components to meet employee contractual agreements.

Remember: Overtime rules use the first day of the week as defined by each organization. Go to Locations > Location > Week Days & Business Hours. Your organization indicates the first day of the week in this window, and once schedules exist, you do not change it. Therefore, overtime calculation changes must also begin on the first day of the week. Special regulations exist for overtime in the state of Nevada, and you can indicate that Nevada start of day rules are enabled on the Overtime window.

Note: Please contact ScheduleSource support for assistance with overtime that involves changes during the middle of a work week.

Refer to the following How To's.

To set up an Overtime Component:

1. Go to **Organization > Tools** and select **Add Policy Component**.
   Policy Component window displays.
2. Enter the **Name** of the Overtime component, select **Overtime**, and select **Next ->**.
   The Overtime Component window displays.
3. Select the check box for **Exempt** or **FLSA**.
4. Select method for determining Employee State using the drop-down list: **Employee Address** or **Employee Default Location**.
5. Leave the default check box enabled if your organization is Exempt from Nevada start of day rules, i.e., employee address or employee default location is not Nevada.
6. Select the radio button to indicate if this component is Shift-based or Custom.
7. Enter the hours/day and hour/week for overtime in each applicable category.
8. Do not select the check box to enable Nevada start of day rules unless it is applicable to your organization.
9. If auto-breaks are used, specify the placement: **Spread**, **Start**, **End**.
10. Select **Save**.
    Note: Versions automatically displays the name of the user who created the Overtime Component and adds an Effective Date: today's date.

To edit an Overtime Component:

1. Go to **Organization > Policy Components** and open the **Overtime** folder.
   Overtime policy components display.
2. Select the Overtime Component you would like to edit.
   The Overtime Component window displays.
3. Make desired changes and select **Save**.
   Overtime Component window displays new version with a link for: Delete Version.
4. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?

5. To delete and begin a new edit, select **OK**.
6. Make desired changes and select **Save**.

To delete an Overtime Component:

1. Go to **Organization > Policy Components** folder and open the **Overtime** folder.
   Overtime policy components display.
2. Select the Overtime Component you would like to delete.
   The Overtime Component window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Project, Tasks & Activities

Use the Project, Task & Activities folder under the Policy Components folder to restrict the employee clock options so that employees only see the projects, tasks, and activities they are assigned to. You can select a sub-list of projects, tasks, and activities by station or use the default list by station. In addition, you may designate that all projects and tasks deployed to a location are available for clocking for those employees assigned to that location.

Note: Station designation is enforced for clocking only when an employee is scheduled to a station, and it only applies if a time card is opened by clicking on the plan scheduled hours blue link. In other words, it is not enforced if an employee is not scheduled to a station or if an add time card is used.

Refer to the following How To's.

To define a Project, Task & Activities policy component:

1. Go to **Organization > Tools** and select Add **Policy Component**.
   Policy Component window displays.
2. Type a **Name**, select **Project, Task & Activity**, and select **Next ->**.
   The Project/Task/Activity Component window displays with the Name you provided.
3. On the Project/Task/Activity Component window, select the check box for **Use Station\Time Settings** if you want to restrict project, tasks, and activities to only those stations on an employee's schedule.
4. Select the Project/Task link to display all projects and tasks. Then, select the **Deployed** check box to the right of the projects and tasks you want deployed in this policy component. You may also select the radio button under **Default** to identify the default project and task for this policy component.
5. Select the check box to **Use Locations Project Task** to restrict the projects and tasks to only those deployed to a location the employee is assigned to.
6. Select **Save**.
   Note: Versions automatically displays the name of the user who created the Project/Task/Activity policy component and adds an Effective Date: today's date.

To edit a Project, Task & Activities policy component:

1. Go to **Organization > Policy Components** folder and open the **Project, Task & Activities** folder.
   Project, Task & Activities policy components display.
2. Select the Project, Task & Activities policy component you would like to edit.
   The Project/Task/Activity Component window displays.
3. Edit or add to existing Project/Task/Activity component criteria.
4. Select **Save**.
   Project/Task/Activity Component window displays new version with a link for: Delete Version.
5. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
6. To delete and begin a new edit, select **OK**.
7. Make desired changes and select **Save**.

To delete a Project, Task & Activities policy component:

1. Go to **Organization > Policy Components** folder and open the **Project, Task & Activities** folder.
   Project, Task & Activities policy components display.
2. Select the Project, Task & Activities policy component you would like to delete.
   The Project/Task/Activity Component window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Shift Based Overtime

Use the Shift Based Overtime folder under the Policy Components folder to define situations in which shift based overtime is eligible for differential or holiday overtime pay. While this is only used in unusual situations, it is possible. You may elect to pay employees overtime for working more than a set number of shifts in a week, even if the hours are lower than the weekly or daily threshold for earning overtime. You may define differential shifts and holiday shifts and specify the number of hours or shifts qualify for shift based overtime. Use this policy component in conjunction with the Shift Differentials policy component. See Shift Differentials for instructions on setting up differential shifts that you use in this policy component.

Refer to the following How To's.

To set up a Shift Based Overtime Policy Component:

1. Go to **Organization > Tools** and select **Add Policy Component**.
   Policy Component window displays.
2. Enter the **Name** of the Shift Based Overtime component, select **Shift Based Overtime**, and select **Next ->**.
   The Shift Based Overtime Component window displays.
3. Enter the Shift definition **Start** Time and **End** Time.
4. Select the **Differential** using the drop-down list: Regular or Diff0-Diff10.
5. Select whether this applies to a **Holiday** using the drop-down list: Regular or Diff0-Diff10.

6. Enter the Shift buffer minutes.
7. Enter the number of daily and weekly shifts for overtime per week.
8. Enter the number of daily and weekly hours for overtime per week.
9. Select **Save**.
   Note: Versions automatically displays the name of the user who created the Shift Based Overtime Component and adds an Effective Date: today's date.

To edit a Shift Based Overtime Policy Component:

1. Go to **Organization > Policy Components** and open the **Shift Based Overtime** folder.
   Shift Based Overtime policy components display.
2. Select the Shift Based Overtime Component you would like to edit.
   The Shift Based Overtime Component window displays.
3. Make desired changes and select **Save**.
   Shift Based Overtime Component window displays new version with a link for: Delete Version.
4. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
5. To delete and begin a new edit, select **OK**.
6. Make desired changes and select **Save**.

To delete a Shift Based Overtime Policy Component:

1. Go to **Organization > Policy Components** folder and open the **Shift Based Overtime** folder.
   Shift Based Overtime policy components display.
2. Select the Shift Based Overtime Component you would like to delete.
   The Shift Based Overtime Component window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Shift Differentials

Use the Shift Differentials folder under the Policy Components folder to define shift differentials by day, shift times, and holidays. You can designate when employees can be paid overtime by working more than a set number of shifts in a week, even if the hours are lower than the weekly or daily threshold for earning overtime. Once you set up a Shift Differential, you can assign the policy component to a policy.

Important: If you are using shift differentials, you need to create one shift differential where the check box for Use Location Shift Differential is selected.

Refer to the following How To's.

To set up Shift Differentials:

1. Go to **Organization > Tools** and select Add **Policy Component**.
   Policy Component window displays.
2. Type a **Name**, select **Shift Differentials**, and select **Next ->**.
   Shift Differentials window displays with the Name you provided.
3. On the Shift Differentials window, select the check box to **Turn on Shift Differentials**.

4. You may select the check box for **Use Location Shift Differential** if you have different shift differentials for different locations. This ensures the Shift Differential definition you are creating applies if there is no differential configured in the location.
5. Select the **Default Differentials** using the drop-down list: Regular or Diff0 - Diff10.
6. Select the check box to **Mark overtime as default differential** if you pay overtime based on the differential you are creating.
7. Select the check boxes of the **Weekdays** and enter the **Start** and **End** time.
8. Select the **Diff** using the drop-down list.
9. If this shift differential applies to a holiday, select the **Holiday** check box.
10. Click **Add**.
    Shift Differential you created displays on the window with a check box on the right.
11. To add more shift differential criteria, select check boxes of the **Weekdays,** enter the **Start** and **End** time, and click **Add**.
    Additional Shift Differential criteria you created displays on the window with a check box on the right.
12. To delete one or more of the shift differential definitions, select the check box to the right of the definition and click **Delete**.
    Shift Differential criteria is deleted.
13. Click **Save**.
    Note: Versions automatically displays the name of the user who created the Shift Differential and adds an Effective Date: today's date.

To apply a Shift Differential to a Location:

1. Go to **Locations** and open the desired location in the Locations folder.
2. Select **Location > Policy Component** in the Location drop-down right top menu.
   Policy Component window displays.
3. Select a **Component Type**, i.e., Shift Differential.
4. Select a **Component**.
5. Enter an **Effective Date**.
6. Select **Save**.
   Shift Differential is available at that location.

To edit a Shift Differential:

1. Go to **Organization > Policy Components** folder and open the **Shift Differentials** folder.
   Shift Differentials policy components display.
2. Select the Shift Differential you would like to edit.
   The Shift Differentials window displays.
3. Define additional shift differentials or delete current shift differentials.
4. Select **Save**.
   Shift Differentials window displays new version with a link for: Delete Version.
5. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
6. To delete and begin a new edit, select **OK**.
7. Make desired changes and select **Save**.

To delete a Shift Differential:

1. Go to **Organization > Policy Components** folder and open the **Shift Differentials** folder.
   Shift Differentials policy components display.
2. Select the Shift Differential you would like to delete.
   The Shift Differentials window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Time Attendance

Use the Time Attendance folder under the Policy Components folder to set up a point system for tracking attendance. You can assign points and counts that relate to employee attendance violations and report of them by location, time period, and work-related criteria. Count the number of attendance exceptions, and assign points for each attendance exception. You can set up violation points for both shifts and breaks.

Note: You can assign every attendance exception a different number of points. For example, an absent can be 5 points while a 5-minute late clock in might give 1 point, and a 15-minute late clock in might give 3 points.

Refer to the following How To's.

To create a Time Attendance policy component:

1. Go to **Organization > Tools** and select Add **Policy Component**.
   Policy Component window displays.
2. Type a **Name**, select **Time Attendance**, and select **Next ->**.
   Attendance Component window displays with the Name you provided.
3. On the Attendance Component window, select the check box for **Track Attendance**.
4. Select the check box for **Absence** if you want to track absences. Enter the number of points to be assessed for each absence.
5. Select the check box for **Not Scheduled** if you want to allow an employee to clock on when not scheduled. Enter the number of buffer minutes.

   Explanation: For example, a scientist who works in a laboratory may return to work to check on an experiment. While not scheduled, you may want to allow the scientist to clock on and may also want to track those hours worked.
6. Select the check box for **Do not enforce Location on attendance** if you want to allow employees to clock on at any location. Do not select the check box if you want employees to clock on at a specific location.

   Explanation: For example, a university food service may have a coffee shop and a dining services facility at three dormitories. Each facility schedules a bus staff, and since the work is location-specific, you only want to allow the employee to clock on at the assigned location.

7. Enter the number of minutes and points you would like to assess for violations involving clocking in early and clocking out early, as well as clocking in late and clocking out late. Notice that you can enter minutes and points for Levels 1, 2, and 3.

   Note: You may enter 0 as points if you allow a grace period for clocking in late. Also, while you may not enter points as a violation for clocking out late, you may want to be notified that someone has worked late and track those hours worked.

8. Enter the number of minutes and points you would like to set up involving breaks, as well as a Break Count.

   Note: While your company may not penalize employees for not taking breaks, some industries are required by law to provide breaks. This gives you a way of tracking employee breaks.

9. Select **Save**.
   Note: Versions automatically displays the name of the user who created the Time Attendance policy component and adds an Effective Date: today's date.

To edit a Time Attendance policy component:

1. Go to **Organization > Policy Components** folder and open the **Time Attendance** folder.
   Time Attendance policy components display.
2. Select the Time Attendance policy component you would like to edit.
   The Attendance Component window displays.
3. Edit or add to existing time attendance component criteria.
4. Select **Save**.
   Attendance Component window displays new version with a link for: Delete Version.
5. To delete and begin a new edit, select **Delete Version**.
   Pop-up window prompts: Delete this version?
6. To delete and begin a new edit, select **OK**.
7. Make desired changes and select **Save**.

To delete a Time Attendance policy component:

1. Go to **Organization > Policy Components** folder and open the **Time Attendance** folder.
   Time Attendance policy components display.
2. Select the Time Attendance you would like to delete.
   The Attendance Component window displays.
3. Click [Delete] at the bottom of the window.
   Pop-up window prompts: Delete this component?
4. Click **OK**.
   Note: If a policy component is used in a policy, it cannot be deleted.

Index