



ScheduleSource TeamWork
Location Portal Guides
Part II Additional Modules
Time & Attendance Module
Version 1.0

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ScheduleSource TeamWork Location Portal Guides. Part II Additional Modules: Time & Attendance Module

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Chapter 1 - Introduction to Time & Attendance

Overview

Use the Time & Attendance module of the Location portal to develop a system for approving time in your organization. Display time-related issues, actual time worked, exceptions, and alerts. View reports on scheduled work versus employee time entered, see where it varies, and also have the ability to quickly estimate overtime.

When the Time & Attendance module is enabled, a link to the Time section displays on the top menu. When you select Time, the following menu selections display. Each contains additional windows that you can use to perform time-related functions.

Review

The Review section provides a number of windows that quickly give you an idea of your workforce's time and attendance. Examine time-related issues, display actual time entries and make adjustments, locate and fix time entry exceptions, view the real time headcount plan, and compare it to the actual headcount. In addition, you can analyze your plan for employee schedules and compare data for a day, week pay period, or range. Information displays for the following time categories: scheduled, actual, time exceptions, headcounts, and variance. View Absent/On to track absences for locations, employees, and time periods. Monitor employees as they clock in and clock out, and export data from a number of the Review section windows to Excel or a CSV file. See *Using the Review Section*. Filter time data by Employee or Crew. Photos can be used to take a picture of the employee clocking on if clocking from a device with a camera.

Pay Period

The Pay Period section provides tools for finalizing pay periods. It includes a visual summarization of hours worked, status, and time sheet data. Also included is a window for Approvals that displays all time-related information for a location as well as an Action button, where you Lock, Unlock, and Approve a Pay Period. You can use a Timesheet window to locate individual employee time sheets and make adjustments to them. A Print/Sheets window allows you to print all time cards on individual sheets. See *Using the Pay Period Section*.

Note: The Enterprise portal controls creating Pay Periods and exporting final approved payroll data.

Reports

The Reports section in the Time & Attendance module provides two types of automatically-generated reports: Roll Ups and Overtime Estimator. In addition, a Design link is provided so that you can access and display time-related reports that are created in the Reports section. See *Reports Section Overview* and *Creating Report Designs*. For assistance with developing a report design, open a support case and send it to ScheduleSource Support. Explain the data you would like to report on, and a technician can help you develop a design that produces those results. See *Using the Reports Section*.



See Also

- [Time & Attendance Workflow](#)
- [Understanding Time & Attendance](#)
- [Navigating in the Time & Attendance Section](#)
- [How To's for Using the Time & Attendance Module](#)
- [Using Filter and Find Tools](#)

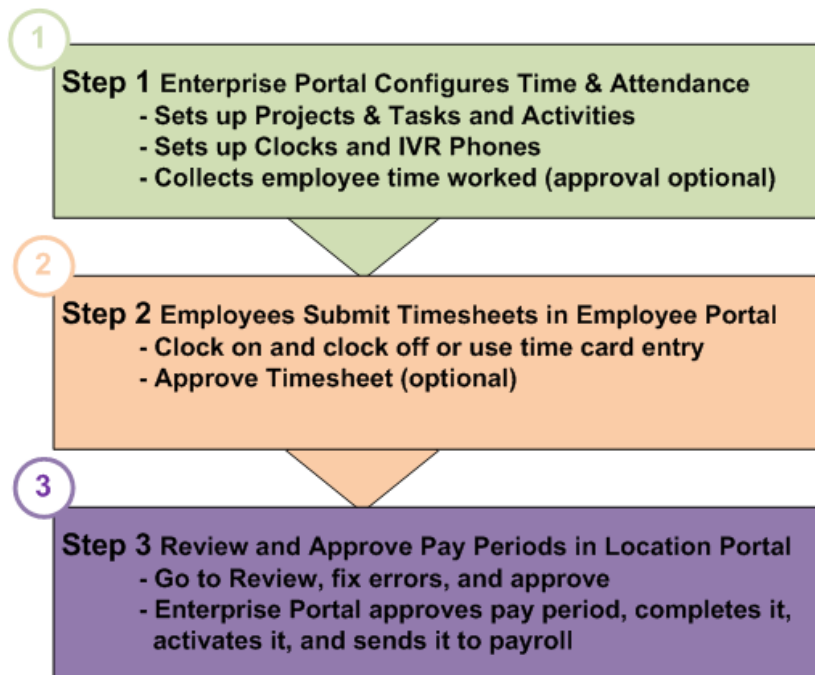
Time & Attendance Workflow

The Time & Attendance module uses records established in the Enterprise portal for locations, employees, stations, and users. After the Time & Attendance module is enabled, you can:

- Collect time-related information in pay periods. They act as containers that hold the employee time worked.
- Use projects, tasks, and activities assigned to your location to collect employee time entries to be paid for hours worked.
- Allow employees to submit entries for time worked using a time card or clocking on and off in the application or a dedicated Kiosk.
- Review employee time entries submitted, resolve problems, and approve a pay period so that the Enterprise portal can export a payroll and employees can be paid.

Workflow Steps

The following workflow shows steps for setting up and using the Time & Attendance module.



See Also

- [Understanding Time & Attendance](#)
- [Navigating in the Time & Attendance Section](#)
- [How To's for Using the Time & Attendance Module](#)
- [Using Filter and Find Tools](#)



Chapter 2 - Understanding Time & Attendance

Overview

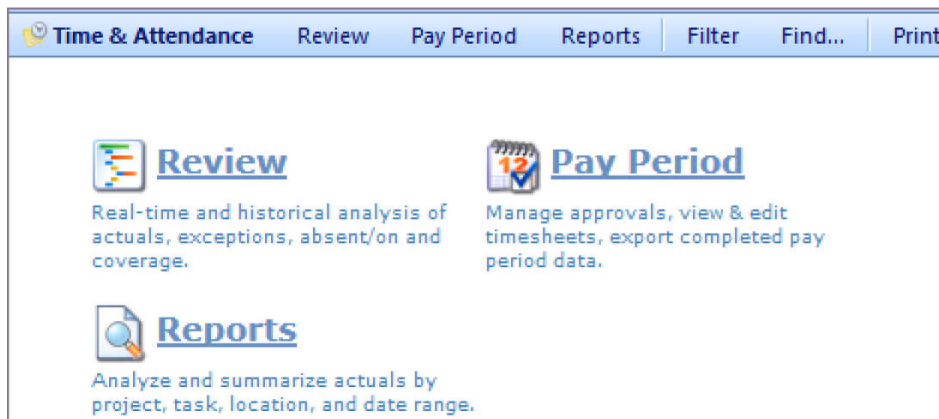
When your organization adds the Time & Attendance module to the Core Scheduling Package, an additional section displays in the top menu bar for Time. There are also additional role definitions that are assigned in the Enterprise portal.

To gain a better understanding of the Time & Attendance module features, see:

- [Role Definitions for Time & Attendance](#)
- [Navigating in the Time & Attendance Section](#)
- [How To's for Using the Time & Attendance Module](#)
- [Time & Attendance Module Windows](#)

Time & Attendance Module Windows

When you select the Time section, Time & Attendance functions display a menu bar with several groups of windows you use to perform timekeeping operations. Windows provide review and analysis, pay period summaries and approvals, and reports.



See the following Time & Attendance sections:

- [Review](#)
- [Pay Period](#)
- [Reports](#)
- [Windows Available from Many Sections](#)

The following shows the new windows that are added in the Location portal and provides a link to the How To's for using them.



Review

Use the Review section to review issues related to time, errors, exceptions, and attendance. View actual time entries, exceptions, headcounts, variance, list absences and attendance on a shift-by-shift basis, review variance, absences, and photos. The following windows display under Time > Review.

- [Issues](#) — Use the Issues window to display all time clocking for a day, week, or pay period. Provides a list of clocking with issues that need review.
- [Actuals](#) — Use the Actuals window to display all clocking for a day, week, or pay period. Provides real time and historical analysis of actual time clocking.
- [Exceptions](#) — Use the Exceptions window to display all time entries that have an exception to be reviewed. Provides a filter for viewing exceptions by type.
- [Headcounts](#) — Use the Headcounts window to display headcounts for locations in 60- 30- and 15-minute intervals. View by variance, schedule, and time. Display only the schedule or 24-hours.
- [Variance](#) — Use the Variance window to display employee scheduled, actual and variance information for each location. Display a day, week, pay period, or range of time. Included schedule only or schedule and Leave.
- [Absent/On](#) — Use the Absent/On window to display employee time in each location. Select values such as all attendance, any exception, still on, absent, and a variety of other time-related factors.
- [Photos](#) — Use the Photos window to display pictures of employees as they clock in and clock out.

For more information, see [Using the Review Section](#). See also the Location Portal Help Card #4 for in-depth assistance on Review > Issues:

http://www.schedulesource.net/support/TimeLocv3_4ReviewIssues.pdf

Launch Review



Issues

Review **Issues** Actuals Exceptions Headcounts Variance Absent/On Photos Customize Selected Recent: Issues

Issues Add attendance issue FILTER ()

Today Monday, May 23, 2016 Day Week Pay Period Range

Location

Name	Actions	Issue Type	Message	Issue Status	Points	Date	On	Off	Shift On	Shift Off	Status
Location: After Hours											
Evergreen, Erik		Attendance	Absent	Open	3	5/23/2016			4:30 PM	1:00 AM	
Entries: 1											

Actuals

Review Issues **Actuals** Exceptions Headcounts Variance Absent/On Photos Mass Customize Recent: Actuals | Issues

Actuals FILTER ()

Today Monday, May 23, 2016 - Sunday, May 29, 2016 Day Week Pay Period Range

Name

Actions	Project	Task	Activity	Type	Date	On	Off	Regular	Overtime	Premium	Leave	Unpaid	Bill	Pay	Total	Status
Name: Evergreen, Erik																
		After Hours Fall 2016	General Operative 1	Activity Superv	card	5/23/2016	4:30 PM	12:30 A	8.00					96.00	8.00	
		After Hours Fall 2016	General Operative 1	Activity Superv	card	5/24/2016	4:30 PM	12:30 A	8.00					96.00	8.00	
		After Hours Fall 2016	General Operative 1	Activity Superv	card	5/25/2016	4:30 PM	12:30 A	8.00					96.00	8.00	
		After Hours Fall 2016	General Operative 1	Activity Superv	card	5/26/2016	4:30 PM	12:30 A	8.00					96.00	8.00	
Count : 4									32.00					384.00	32.00	
Count : 4									32.00					384.00	32.00	

Exceptions

Review Issues Actuals **Exceptions** Headcounts Variance Absent/On Photos Customize Recent: Exceptions | Actuals

Exceptions FILTER ()

Open Threshold (Hours): All Long Threshold (Hours): 24 Errors: All Apply

Today Monday, August 10, 2015 - Sunday, August 23, 2015 Day Week Pay Period Range

Drag a column header and drop it here to group by that column

Location	Name	Actions	Type	Date	On	Off	Hours	Status
Dining Services	Apple, Allison		card	8/17/2015	2:00 PM	2:00 PM	0.00	
Dining Services	Apple, Allison		card	8/18/2015	2:00 PM	2:00 PM	0.00	
After Hours	Apple, Allison		card	8/23/2015	6:00 PM	10:00 PM	4.00	
Entries: 3							4.00	

Notes:
 1. Select which exception types you wish to view (Open, Long or Errors).
 2. Selecting Error equal to "Valid" filters all entries to only non-error entries.



Absent/On

Review Issues Actuals Exceptions Headcounts Variance Absent/On Photos Mass										
Recent: Absent/On										
Absent/On										
Today Friday, September 11, 2015 Day Week Pay Period Range										
Location										
	Employee Name	Actions	Start	End	Station	Plan	Hours	VS	Type	On
								[All Attendance]		
Location: After Hours										
	Evergreen, Erik		5:00 PM	9:00 PM	Bus		4.00 [Assign]	Absent	[Add Time Entry]	
	Apple, Allison		5:00 PM	11:00 PM	Bartender		6.00 [Assign]	OK	card	5:00 PM 11:00 PM AH003 / AH003a / A001 6.00
	Luck, Linda		6:00 PM	10:00 PM	Cashier		4.00 [Assign]	OK	card	6:00 PM 10:00 PM AH003 / AH003a / A001 4.00
	Hunt, Harold		7:00 PM	1:00 AM	Bus		6.00 [Assign]	OK	card	7:00 PM 1:00 AM AH003 / AH003a / A001 6.00

Headcounts

Review Issues Actuals Exceptions Headcounts Variance Absent/On Photos										
Recent: Headcounts Absent/On										
Headcounts										
Variance Schedule Time 60 30 15 Limit All										
Today Friday, September 11, 2015 Day										
	Location	Start	4P	5P	6P	7P	8P			
	After Hours	5:00pm	0.0	2.0	3.0	4.0	4.0			
	Dining Services	6:00am	3.0	3.0	3.0	1.5	1.0			

Variance

Review Issues Actuals Exceptions Headcounts Variance Absent/On Photos Customize										
Recent: Variance Headcounts Absent/On										
Variance										
Schedule Only Schedule & Leave										
Today Friday, September 11, 2015 Day Week Pay Period Range										
	Employee Name	Email	ExternalId	Actions	Scheduled	Actual	Variance			
Location: After Hours										
	Apple, Allison				6.00	6.00	0.00			
	Evergreen, Erik				4.00	0.00	-4.00			
	Hunt, Harold				5.00	5.00	0.00			
	Luck, Linda				4.00	4.00	0.00			

Photos

Review Issues Actuals Exceptions Headcounts Variance Absent/On Photos										
Recent: Photos										
Photos										
Today Friday, September 04, 2015 Day										
	Employee	ON	OFF	Type	Hours					
	Cloud, Casey After Hours	9/4/2015 5:00:00 PM	9/4/2015 11:00:00 PM	card	6.00					
	Berry, Barbara After Hours	9/4/2015 6:00:00 PM	9/4/2015 10:00:00 PM	card	4.00					



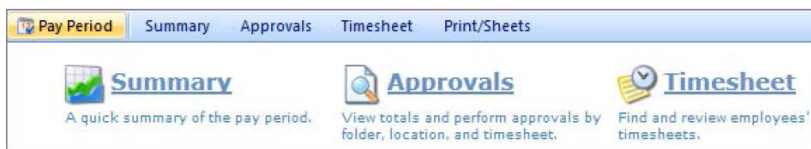
Pay Period

Use the Pay Period section to finalize pay periods. The following windows display under Time > Pay Period.

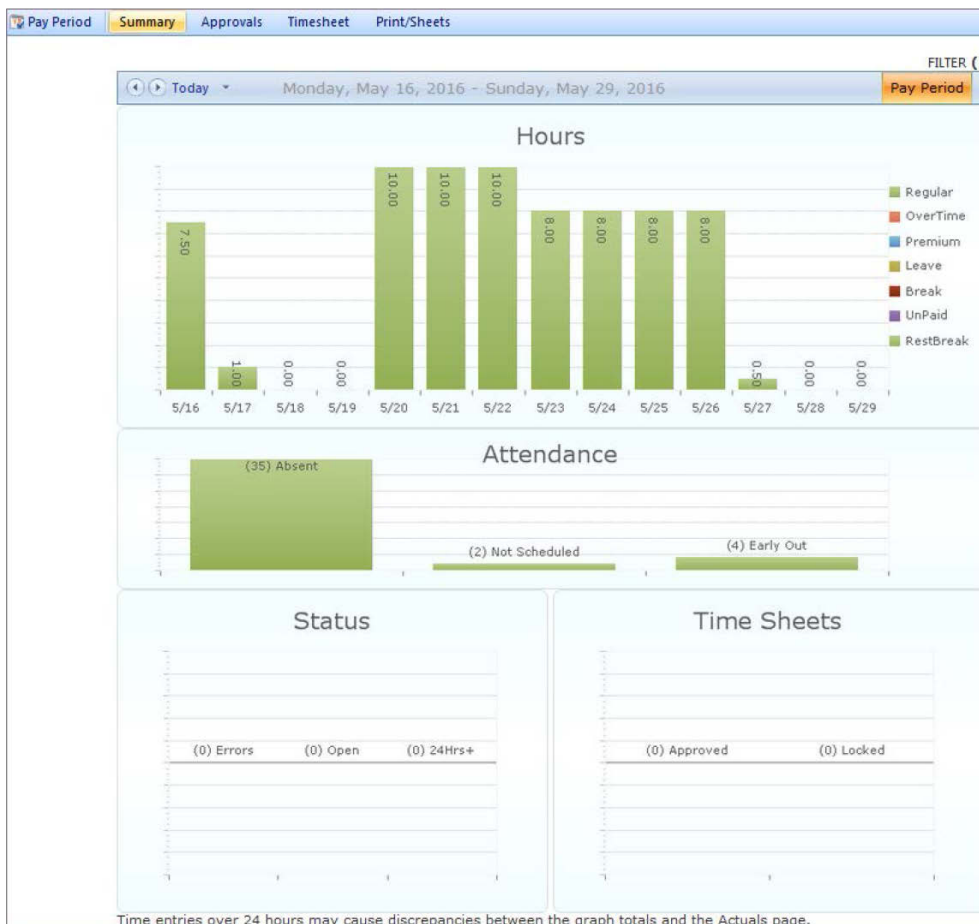
- [Summary](#) — Use the Summary window to get a quick snap shot of hours, status, and time sheets.
- [Approvals](#) — Use the Approvals window to perform individual approvals by time sheet and location, as well as mass lock and approvals.
- [Timesheet](#) — Use the Timesheet window to view and edit individual time sheets.

For more information, see [Using the Pay Period Section](#).

Launch Pay Period



Summary



Approvals

The screenshot shows the 'Approvals' window with a tabbed interface. The 'Approvals' tab is active. It displays a table for employee approvals for the pay period Monday, May 16, 2016, to Sunday, May 29, 2016. The table includes columns for Employee Name, Actions, Employee, Local, Manager, Enterprise, Organization, Open, Error, Void, Valid, Regular, Overtime, Premium, Leave, Unpaid, and Total. The entry for Allison Apple shows 40.00 regular hours and 40.00 total hours.

Employee Name	Actions	Employee	Local	Manager	Enterprise	Organization	Open	Error	Void	Valid	Regular	Overtime	Premium	Leave	Unpaid	Total
Apple, Allison	[Icons]	[AI]	[All]	[All]	[All]	[All]	0	0	0	4	40.00					40.00

Timesheet

The screenshot shows the 'Timesheet' window for employee Allison Apple. It includes a search bar and a summary table for the pay period Monday, May 16, 2016, to Sunday, May 29, 2016. The summary table shows 40.00 regular hours and 40.00 total hours. Below the summary is a detailed table of entries for 'After Hours' on May 19, 20, 21, and 22, 2016, each with 10.00 hours.

Location	Local	Manager	Enterprise	Organization	Open	Error	Void	Valid	Regular	Total
After Hours	[Unlock]	[UnApprove]	Not Locked	Not Approved	0	0	0	4	40.00	40.00

Type	Location	Project	Task	Activity	On	Off	Regular	Bill	Pay	Total	Status
card	After Hours	After Hours Fall 2016	General Operations	Activity Supervisor 1	6:00 AM	4:00 PM	10.00	0.00	120.00	10.00	[Info]
card	After Hours	After Hours Fall 2016	General Operations	Activity Supervisor 1	6:00 AM	4:00 PM	10.00	0.00	120.00	10.00	
card	After Hours	After Hours Fall 2016	General Operations	Activity Supervisor 1	6:00 AM	4:00 PM	10.00	0.00	120.00	10.00	
card	After Hours	After Hours Fall 2016	General Operations	Activity Supervisor 1	6:00 AM	4:00 PM	10.00	0.00	120.00	10.00	
Entries: 4							40.00	0.00	480.00	40.00	

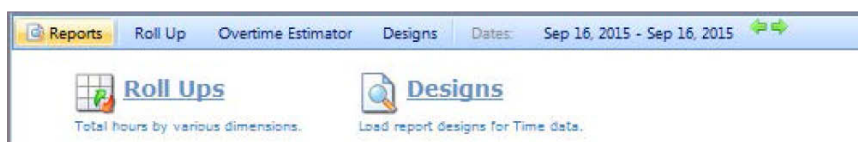
Reports

Use the Reports section to quickly display time-related data for specific dates. The following windows display under Time > Reports.

- [Roll Up](#) — Use the Roll Up window to display entry hours or calculated hours for a project, project and task, activity, day, or employee.
- [Overtime Estimator](#) — Use the Overtime Estimator window to display work hours for a pay period.
- [Designs](#) — Use the Reports window to run the time-related reports. For more information about creating reports, see Understanding Report Designs.

For more information, see [Using the Reports Section](#).

Launch Reports



Roll Up

Reports **Roll Up** Overtime Estimator Designs Dates: Sep 10, 2015 - Sep 10, 2015 Recent: Roll Ups | Designs

Roll-Up Reports

summarize by: Employee show totals for: Entry Hours Load FILTER (Location = Dining Services)

Employee	Regular	Leave	Billable	Paid	Total
Apple, Allison	8.00	0.00	0.00	8.00	8.00
Berry, Barbara	8.00	0.00	0.00	8.00	8.00
Door, Dave	8.00	0.00	0.00	8.00	8.00
Gate, Gary	7.00	0.00	0.00	7.00	7.00
Jump, Joan	6.00	0.00	0.00	6.00	6.00
Luck, Linda	12.00	0.00	0.00	12.00	12.00
Zabowski, Zach	8.00	0.00	0.00	8.00	8.00
	57.00	0.00	0.00	57.00	57.00


Designs

Reports Roll Up Overtime Estimator **Designs** Dates: Sep 10, 2015 - Sep 10, 2015

Reports	Charts	Styles
Time_Design1		Default
Time_Design2		example
Time_Design3		Example
		Example
		New_Brown
		New_Pink

Overtime Estimator

Overtime Estimator Recent: Overtime Estimator | Attendance | Designs | Roll Ups | Timesheet

Employee Name	Actions	Totals	5/23/2016	5/24/2016	5/25/2016	5/26/2016	5/27/2016	5/28/2016	5/29/2016
Apple, Allison	  	40.00: Reg				10.00: Reg	10.00: Reg	10.00: Reg	10.00: Reg
Berry, Barbara	  								
Cloud, Casey	  								
Door, Dave	  								
Evergreen, Erik	  	Absent  40.00: Reg 2.30: OT  0.50: OT 	8.00: Reg	Absent  12.00: Reg 2.30: OT 	9.00: Reg	8.50: Reg	2.50: Reg 0.50: OT 		

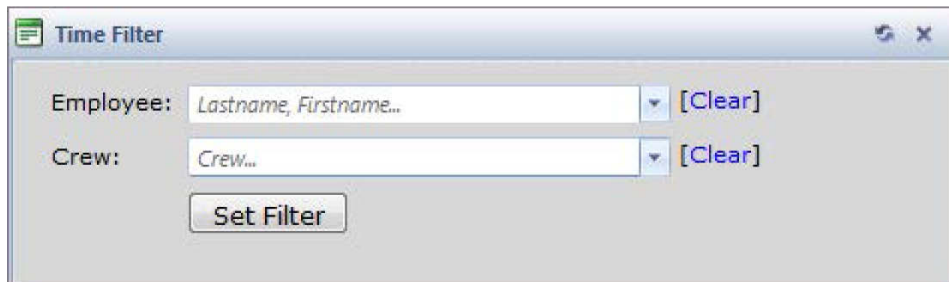


Windows Available from Many Sections

The Time & Attendance Module uses a user-friendly interface that provides multiple levels of access to key windows from all sections. You can find what you are looking for quickly using the time filter and find windows. In addition, active clock and card links display employee time clock or time card entries from multiple windows. Using these windows, you can correct time entries or the status. You can also mark and entry as an error or void it. See:

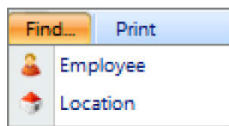
- [Filter](#)
- [Find](#)
- [Edit Entry](#)
- [Add Entry](#)
- [Assign](#)

Filter

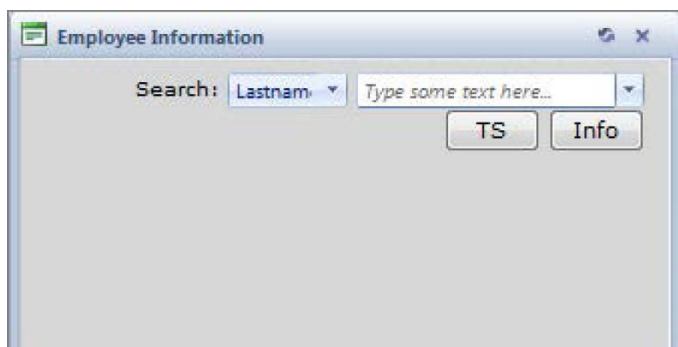


Find

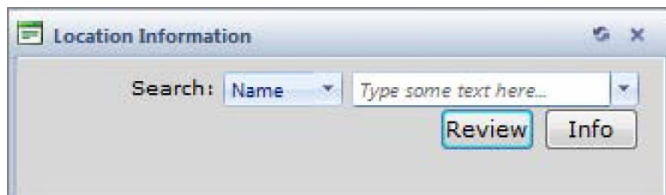
Use the Find windows to access specific employee or location information.



Find Employee



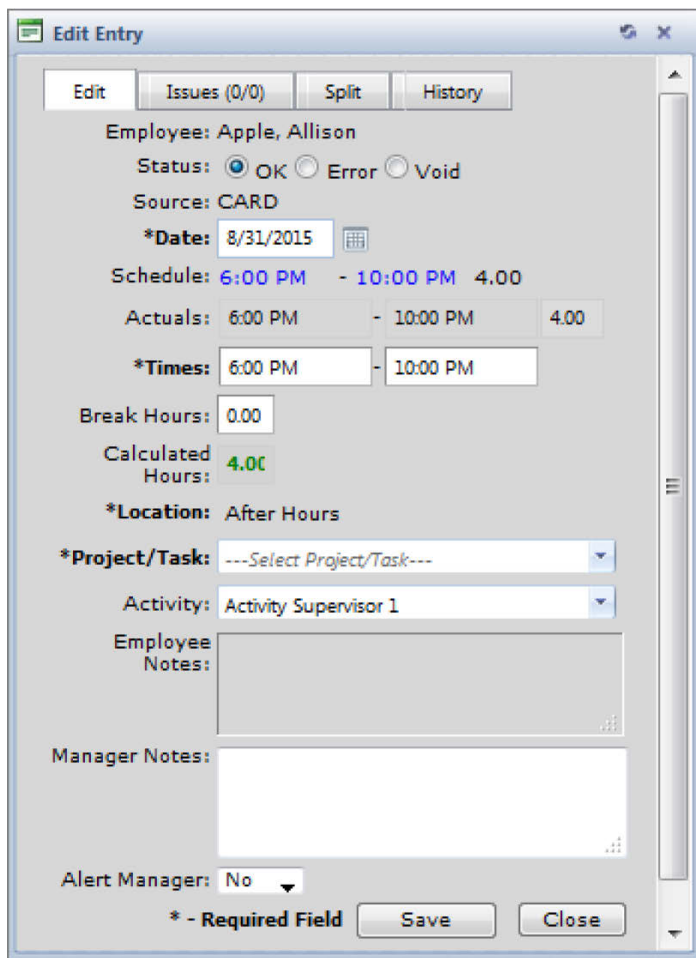

Find Location



The **Location Information** dialog box features a search section with a dropdown menu set to "Name" and a text input field containing the placeholder "Type some text here...". Below the search field are two buttons: "Review" and "Info".

Edit Entry

The Edit Entry window displays when you select a card or clock link on many of the Review windows such as Actuals, Exceptions, Headcounts, and Absent/On and on the Timesheet window under the Pay Period section.



The **Edit Entry** dialog box contains several sections for data entry:

- Buttons:** Edit, Issues (0/0), Split, History.
- Employee:** Apple, Allison
- Status:** Radio buttons for OK (selected), Error, and Void.
- Source:** CARD
- *Date:** 8/31/2015 (with a calendar icon)
- Schedule:** 6:00 PM - 10:00 PM 4.00
- Actuals:** 6:00 PM - 10:00 PM 4.00
- *Times:** 6:00 PM - 10:00 PM
- Break Hours:** 0.00
- Calculated Hours:** 4.00
- *Location:** After Hours
- *Project/Task:** ---Select Project/Task---
- Activity:** Activity Supervisor 1
- Employee Notes:** A text area for notes.
- Manager Notes:** A larger text area for manager notes.
- Alert Manager:** No (with a dropdown arrow)
- Footer:** * - Required Field, Save, Close



Add Entry

The Add Entry window displays when you select the Add Time Entry link from the Review > Absent/On window. If an employee forgot to clock on or add a time entry, you can do it for them.

Add Entry

Employee: Ferry, Fern
Source: ADMIN

*Date: 8/31/2015

Schedule: 5:00 PM - 11:00 PM 6.00

*Times: 5:00 PM - 11:00 PM

Break Hours:

Calculated Hours: 6.00

*Location: After Hours

*Project/Task: After Hours Fall 2015 / General Operation

Activity: Activity Supervisor 1

Manager Notes:

Alert Manager: No

* - Required Field Save Close

Assign

The Assign window displays in the Review section when you click the Assign link on Review > Absent/On window. You are also directed to the Absent/On window from the Variance window tabs.

Available Employees

Location	Station	Day	Shift	Hours	Assigned To
After Hours	Bartender	8/31/15 (Mon)	5:00 PM-11:00 PM	6.00	Kent, Kyra [Clear]

☐ Create Day Off Request after reassignment?

--- Reassign Reason --- [Shift History] [Codes] [About]

All | Default Location

Priority	Rank	Employee	Conflicts	Avail	Shifts	Days	Hours
9		Berry, Barbara		11:00AM-11:00PM; (LOCAL)		4 / 7	28.0 / 40
9	8	Door, Dave		5:00PM-11:00PM; (LOCAL)		4 / 7	30.0 / 40
9		Evergreen, Erik		(LOCAL)		4 / 7	28.0 / 40
7		Jump, Joan		(MASTER)		4 / 7	27.0 / 40
9		Ferry, Fern	Sch	11:00AM-11:00PM; (MASTER)	5pm-11pm	5 / 7	34.0 / 40
7	7	Apple, Allison	Sch	(LOCAL)	6pm-10pm	4 / 7	28.0 / 40
1 NC		Gate, Gary		6:00AM-; (MASTER)	8am-2pm	5 / 7	31.0 / 40



Chapter 3 - Role Definitions for Time & Attendance

Overview

The following role definitions for the Time & Attendance module apply to users in the Location portal. The role definitions are set up in the Enterprise portal and assigned to Location portal users. They control the Time & Attendance operations those users can perform in the Location portal.

While all Time & Attendance tasks can be performed in the Enterprise portal, many organizations manage time-related functions involving location management and scheduling in the Location portal.

Role Definitions

The following are the Location portal role definitions for the Time & Attendance module.

Action	Permission description...
View	allows viewing of the Time section data; no editing
Edit	allows full editing of the time data, but not the ability to clock an employee in
Clock in Employees	adds ability to clock in an employee; link added on the employee Timesheet
Lock	allows a timesheet to be locked to prevent changes
UnLock	allows a timesheet to be unlocked for changes
Mass Lock	allows all timesheets to be locked at once
Approve	allows a timesheet to be locked and approved
UnApprove	allows for a timesheet being unapproved for changes
View Pay Rates	adds pay rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Pay Rate for the time entry
View Bill Rates	adds bill rate data to the Review/Actuals & Pay Period/Time Sheet pages; displays the Total Dollars for Bill Rate for the time entry
View Time Issues*	adds the 'Issues Tab' to the Review Section for view only
Edit Time	adds ability to Edit Time Issues



Action	Permission description...
Issues*	
Mark Time Issues Void*	adds ability to Change Status of Time Entry to Void
Mark Times Issues Open*	adds ability to Change Status of Time Entry to Open
* indicates	these are also known as Attendance issues



Chapter 4 - Navigating in the Time & Attendance Section

Overview

The Time & Attendance section provides many user-friendly features such as icons and tools that make navigation easy. These enhancements help you do your job quickly and efficiently. See:








- [Using Icons to Access Information](#)
- [Using Icons to Display Time Sheet Status](#)
- [Using Grid Features](#)
- [Using Review Window Features](#)
- [Filtering Data](#)
- [Customizing Review Windows](#)
- [Using Design Mode](#)
- [Using Filter and Find Tools](#)

Using Icons to Access Information





Use the icons in the Time & Attendance section to quickly access related information.

- When you hover over the icon, a description displays.
- When you select the icon, it launches the related information.

The following table shows the icons and describes the information they provide.

Select Icon	to...
	display employee's contact information
	display employee's three-week schedule
	display employee's time sheet
	filter data. Enter a number, letter, or word and then select the filtering option you want to apply.
	export data in a window to an Excel file
	export data in a window to a CSV file
	display employee's time entry in error status







Select Icon	to...
	display employee's time entry in void status
	display employee's entry with note. Hover over the icon to view the note contents.
	display employee's time entry selected to alert the manager
	display ScheduleSource Helpdesk to enter a new ticket

Using Icons to Display Time Sheet Status

Use icons in the Pay Period section to quickly determine time sheet status for each employee. Launch the Approvals window to display employee time sheet status.

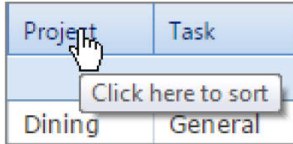
The following table shows the icons and describes the information they provide.

Icon displays	when time sheet status is
	Locked
	Not Locked
	Approved
	Not Approved




Using Grid Features

Use grid features to configure the windows in the Time & Attendance section so that you can quickly find the information you are looking for.

The following table shows the grid features and summarizes how they work.

Feature	description of how it works
	<p>Hover over column header to get finger pointer.</p> <p>Click to sort. Arrow switches between ascending and descending order.</p> <p>Note: Some grids have static column headers.</p>



Feature	description of how it works
	Hover over the arrow in a group header bar and click to collapse a group. The arrow points to the right, indicating the group is collapsed. Click on the arrow again to expand the group.
	Hover over column header to get cross pointer and drag column header to new location. To ungroup, drag from header bar back to grid and place it in the position you want it.
	Display time-related data by Day, Week, Pay Period, or in some windows, specify a Range

Using Review Window Features

Several Review windows provide access to additional features. They are in the Mass and Customize tabs.

- **Mass** — allows you to quickly make changes to employee time in the Actuals and Absent/On windows. Focus on time-related information for a few employee or all employees.
- **Customize** — allows you to filter the information that displays on a window, save it and retrieve it at another time, and make it available to other users to load. Once you customize a window, you can use it over and over to quickly display desired information.
- **Customize > Design Mode** — allows you to design your own grid view in the Actuals and Exceptions window. Choose the columns you want to display and then make desired changes such as grouping, sorting, and adding filters. See [Using Design Mode](#).

The following describes customizing windows. See:

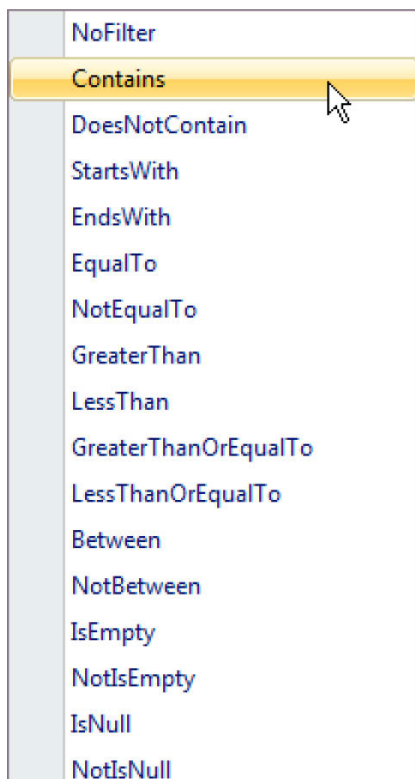
- [Filtering Data](#)
- [Customizing Review Windows](#)
- [Using Design Mode](#)



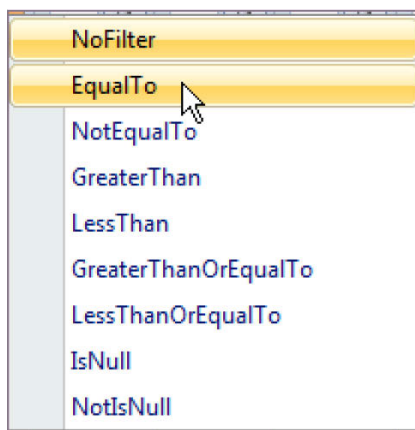
Filtering Data

There are built-in filters you can select for alphanumeric and numeric data. Once you identify the information you are looking for in the text box provided, expand the column by moving its width to display the additional filtering options. See the filtering options for each type of data below.

Alphanumeric Data



Numeric Data



Customizing Review Windows

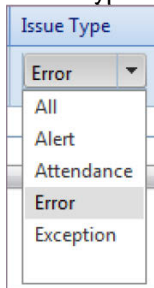
Refer to the following to see a summary of filtering options available in each of the following Review windows.

- [Issues Window](#)
- [Actuals Window](#)
- [Exceptions Window](#)
- [Variance Window](#)

Issues Window

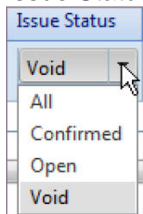
Use the **Customize** tab to **Show Filter** and display additional filtering options. When you want to view different values, change the filtering information or select Hide Filter. Columns that can be filtered include the following options:

- Issue Type



- Message - message contents

- Issue Status



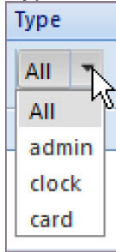
- Points - numeric amount of points for the attendance record, as defined on the attendance setup in a policy. See the Time Attendance window in Policy Management.
- Date - calendar date plus filter selection
- On - numeric, time on plus filter selection
- Off - numeric, time off plus filter selection
- Shift On - numeric, shift on plus filter selection
- Shift Off - numeric, shift off plus filter selection



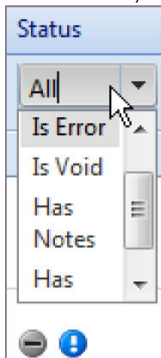
Actuals Window

Use the **Customize** tab to **Show Filter** and display additional filtering options. When you want to view different values, change the filtering information or select Hide Filter. Columns that can be filtered include the following options:

- Project - alphanumeric project name plus filter selection
- Task - alphanumeric project name plus filter selection
- Activity - alphanumeric project name plus filter selection
- Type



- Date - calendar date plus filter selection
- On - numeric, time on plus filter selection
- Off - numeric, time off plus filter selection
- Regular - numeric, regular hours plus filter selection
- Overtime - numeric, overtime hours
- Premium - numeric, premium hours plus filter selection
- Leave - numeric, leave hours plus filter selection
- Unpaid - numeric, unpaid leave hours plus filter selection
- Bill - numeric, bill type hours plus filter selection
- Pay - numeric, pay type hours plus filter selection
- Total - numeric, total hours plus filter selection
- Status - All, Is Error, Is Void, Has Notes, Has Alert



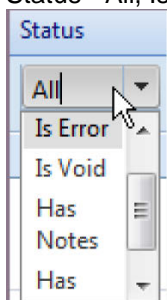
Exceptions Window

Use the **Customize** tab to **Show Filter** and display additional filtering options. When you want to view different values, change the filtering information or select Hide Filter. Columns that can be filtered include the following options:

- Type



- Date - calendar date plus filter selection
- On - numeric, time on plus filter selection
- Off - numeric, time off plus filter selection
- Hours - numeric, hours plus filter selection
- Status - All, Is Error, Is Void, Has Notes, Has Alert



Variance Window

Use the **Customize** tab to **Show Filter** and display additional filtering options. When you want to view different values, change the filtering information or select Hide Filter. These options include:

- Scheduled - numeric, number of scheduled hours plus filter selection
- Actual - numeric, number of actual hours plus filter selection
- Variance - numeric, number of hours difference between scheduled and actual plus filter selection



Using Design Mode

The Design Mode is available under the Customize tab in the Actuals and Exceptions windows. It allows you to choose the columns you want to display and then make desired changes such as grouping, sorting, and adding filters. You can redesign a window to display the specific information you want to see. Ten records display in the redesigned window.

To use Design Mode:

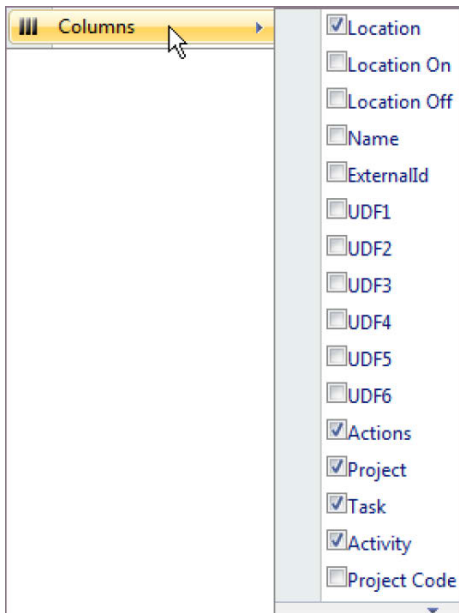
1. Go to **Customize > Design Mode**.
DESIGN MODE displays in bold on top navigation bar.
2. Select a column title and right-click to change the sort. Options include:



3. To change the grouping, right-click and select group options.



4. To change the columns that display, right-click and select Columns. Scroll to the window that displays on the right and select the check boxes of the column names you want to display. For example, project-related columns might include the following.



Note: Ten records display in the window. To change the records that display, change the column names that display and the associated filters.

5. To save the design for future use, go to **Customize > Save**.
Save Grid Settings window displays.
6. Type the **Name** of the design.
7. Select the check boxes to designate it as **Default** and/or **Shared**.
Note: If you select Default, it becomes the default display for the window. If you select Shared, other users can display the design of this window.



8. Select **Save**.
The designed window is available under Customize > Load > name you gave the design.
9. To change the design or its designation, load the design and select **Customize > Save**.
Save Grid Settings window displays.
10. Make the desired changes and select **Save**.
11. To save the design under another name, load the design and select **Customize > Save As**.
Save Grid Settings window displays.
12. Make the desired name or settings changes and select **Save As**.

Using Filter and Find Tools

Use the filter window to identify a subset of information you would like to view. You can access it either using the Filter tab or selecting the Filter link on the top right of the grid window. Once you select information and click the Set Filter button, all windows in the Time & Attendance section display the filtered data. To remove the filter, use the [Clear] feature available in the Filter window.

To Find an employee or location and the related information, select the Find tab and select either Employee or Location.

For more information, see [Using Filter and Find Tools](#).



Chapter 5 - How To's for Using the Time & Attendance Module

Overview

Use the menu selections in the Time & Attendance module to perform a number of time-related functions.

- [Using the Review Section](#) — The Review section provides tools you can use to review time entries daily. It provides real-time and historical analysis of actuals, exception, absent/on, and coverage. From every window, you can click on Filter and use the Time Filter window to change from one location to another location, find a specific employee or crew, or a folder. Use the time arrow buttons to change the day from today to a previous or next day. View time by day, week, pay period, or range.
- [Using the Pay Period Section](#) — The Pay Period section allows you to view and edit time sheets, approve a pay period, complete it, and export the data to payroll. To accomplish this, you can display a quick summary of the pay period that includes hours, status of time entries such as unresolved errors and open clocks, and the number of time sheets that are locked and/or approved. You can also lock and approve time sheets for an individual or by a location. Links allow you to Lock, Approve, and Unlock time sheets. Errors are flagged so you can fix them.
- [Using the Reports Section](#) — The Reports section provides access to time-related data using a pre-defined Roll Up report, Attendance roll up report, and an Overtime Estimator. You can analyze and summarize actuals by project, task, location, and date range. Display time-related reports that are created in the Reports section, or copy them and make changes using the Design functionality in the Reports section.
- [Using Filter and Find Tools](#) — Quickly access the information you are looking for using the Time Filter window and the Find windows for Locations and Employees.

Using the Review Section

The Review section is the same in the Enterprise portal and the Location portal. Depending on your role permissions for the Time section, you can use either portal to perform time-related tasks.



The Review section provides tools you can use to review time entries daily. How To's include:

- [Using the Issues Window](#) — allows you to manage issues that display when employees fail to clock off or make other time clock errors. Issues also display when an employee incorrectly completes a time card entry. These issues can also be generated when an employee enters a Yes in the Alert Manager field on an Add or Edit Entry window. Issues are system-generated when an error, exception, or attendance-related problem occurs. A grid identifies the issue type and issue status, and you can click on the issue status as well as time to launch an Edit Entry window. Add or edit time entries, or change issue status from this window. View issues by day, week, pay period, or range.
- [Using the Actuals Window](#) — allows you to browse time entries. It provides a summarized list of all time sheets by day, week, pay period, or range. Use icons to display other sections such as employee contact information, employee schedule information, and employee time sheet. You can also click on card or clock under Type and make adjustments to actual time entries.



- [Using the Exceptions Window](#) — allows you to find and fix time entry exceptions. You can filter on exception type, and view exceptions by day, week, pay period, or range. Customize the window by showing or hiding items to filter by.
- [Using the Headcounts Window](#) — allows you to view real time headcount plan versus actuals for a day. You can view by 60-, 15-, or 15-minute time slots or view headcounts by variance, schedule, or time.
- [Using the Variance Window](#) — allows you to analyze your Plan versus Actual totals for Scheduled, Actual, and Variance. Select a column and sort values by the column you select. View variance by day, week, pay period, or range. Use icons to display other sections such as employee contact information, employee schedule information, and employee time sheet.
- [Using the Absent/On Window](#) — allows you to list Plan versus Actual totals for locations, employees, and dates. Provides a summary of employee scheduled versus actual time clocking and exceptions so you can quickly identify problems in schedules and/or time sheets. View time by day, week, pay period, or range. Sort by employee or type of exception. Use icons to display other sections such as employee contact information, employee schedule information, and employee time sheet. Use the planned Start and End time to display the Edit Shift window. Use the Assign link to navigate to the Available Employees window. You can also click on a selection under Type and make adjustments to actual time entries or add a time entry for an employee. To make adjustments to many employees at once, use the Mass add time entries window.
- [Using the Photos Window](#) — allows you to view the pictures of employees as they clock in and clock out. Side-by-side photos display in the Photos window to ensure the same person clocks in and out and no one employee is punching in or out for other employees. Display the shifts for locations and list of employees scheduled to work.

Note: There are tools available in windows in the Review section. You can:

- Use the Mass link to make changes to time-related information in the Actuals and Absent/On windows. See [Using the Actuals Window](#) and [Using the Absent/On Window](#).
- Use the Customize link to filter data in the Issues, Actuals, Exceptions, and Variance windows. See [Using Review Window Features](#).
- Use the **Filter** link to filter by Location, Employee, or Crew. See [Using Filter and Find Tools](#).
- Use the Export data links to export information in a window to an Excel  file or a CSV file .

Refer to the following How To's.



Using the Issues Window

Use the Issues window to view time for a day, week, pay period, or range. Locate the time issues that need review and resolve them so that employees can be paid.

Remember: If a time entry is flagged as an error, the employee is not paid no matter how many hours are worked. If a time entry is flagged as an alert, the employee is paid. If a time entry is flagged as void, none of the time entry is paid. However, you can void a time entry and then submit a new time entry.

To use the Issues window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Review > Issues**.
Issues window displays.
3. Select a time period. The default is Day. Select Week or Pay Period if desired.
OR
Select a Range and then use the calendar to select a From Date and a To Date. Select **Apply**.
Issues window displays time period and lists issue types, issue status, and time information.
4. Clock Entry or Card Entry window displays.
Remember: Guidelines for identifying clocking as an error are set in the Enterprise portal in Location > Time > Setup Time & Rules under Clock vs. Schedule.
5. Open a time entry to make desired changes to **Dates** and **Times** and select **Save**.
6. To change an Error status, change the **Status** to **OK** and select **Save**.
Window prompts: Undo ERROR status? This will add the hours to all roll-ups.
If you select OK, the time entry status is OK. When you save the window, the issue no longer displays in the Issues window.
Note: If a time entry is flagged as an error, the employee does not get paid for the hours unless the Status is OK.
OR
Change the status to **VOID**.
Window prompts: Do you want to VOID this entry? This will confirm the error.
If you select OK, the time entry is Void. When you save the window, the issue no longer displays in the Issues window.
Remember: An employee does not get paid for a time entry that is void. Resubmit a correct time entry.
7. To view Issues, select the **Issues** tab.
Edit Entry window displays the issue information.
8. To split the shift, select the **Split** tab.
Edit Entry window displays an option for splitting the shift.
9. To view history, select the **History** tab.
Edit Entry window displays the history of this time entry.
10. To view the list alphabetically by employee name, select the **Name** column heading.
11. To void or confirm attendance of all employees or selected employees, select **Selected**. Use **Toggle All** to quickly select all employees and select **Confirm** or **Void**.



Using the Actuals Window

Use the Actuals window to view all time entries for a day, week, pay period, or range. Select a card or clock type and make changes. Filter the table contents to view only specific information.

To use the Actuals window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Review > Actuals**.
Actuals window displays.
3. Select a time period. The default is Day. Select Week or Pay Period if desired.
OR
Select a Range and then use the calendar to select a From Date and a To Date. Select **Apply**.
Actuals window displays time period and lists time by employee name. Includes time type, time information, pay, and total.
4. Select card, clock, or admin to make changes to the dates and times or other information.
Edit Entry window displays.
Note: If your organization requires that employees approve their time sheets, you cannot make changes to an approved time sheet unless an employee first unapproves that time sheet.
5. Select **Save**.
Actuals window reflects the changes.
Note: The Status column displays icons that depict time entry status. Refer to [Using Icons to Access Information](#).
6. To customize and display other filter options in your columns, select **Customize > Show Filter**.
7. Under the **Type** column, select: All or admin, clock, or card time entries.
8. Select a specific **Date** using the calendar icon or select a specific **On** time or **Off** time using the Time Picker.
9. Select the filter symbol to get choices for hours displayed. Columns with the filter symbol include: Regular, Leave, Unpaid, Bill, Pay, and Total.
10. Type a number and then select the filtering options.
For Example: For Paid hours, type 0 in the Regular column and select the GreaterThan filter.
11. Use the **Mass** link to add time entries to many employees in a location. Select **Mass > Add**.
Mass Add Time Entries window displays.
12. Select a **Location** and the **Employees**. Make changes or additions to the **Date**, **Times**, and **Project/Task** and select **Save**.
13. Use the **Mass** link to toggle the Update on and off. Select Update On > Toggle All Time.
Actual entries have a yellow highlight. A check box displays by each employee's time entry.
14. Clear the check boxes of the employees whose time is correct, i.e., time you are not changing.
15. Select **Mass > Update (On) > Update**.
Mass Update Time Entries window displays.
16. Select **Start Time**, **End Time**, and **Break Hours** and enter time information.
17. Select **Project/Task** and **Status**.
18. Type **Manager Notes** and designate the **Alert** status.
19. Select **Save**.
Actuals window refreshes and reflects the changes you made.
20. To redesign the information the window displays, select **Customize > Design Mode**. See [Using Design Mode](#).



Using the Exceptions Window

Use the Exceptions window to view all time entries that have an exception and need to be reviewed. Display exceptions for a day, week, pay period, or range. Select a card, clock, or admin type of time entry and make changes. Filter the table contents to view only specific information.

To use the Exceptions window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Review > Exceptions**.
Exceptions window displays.
3. Select the Exceptions type: Open Threshold (Hours) for All or None, Long Threshold (Hours) for 24 or None, and Errors for All, UnResolved, Resolved, Valid, or None. Select.
Exceptions window displays type of Exceptions.
4. Select a time period. The default is Day. Select Week or Pay Period if desired.
OR
Select a Range and then use the calendar to select a From Date and a To Date. Select **Apply**.
Exceptions window displays exceptions for the time period and lists time by Location and employee Name. Includes Actions, Type, Date, On, Off, Hours, and Status.
5. Select card, clock, or admin to make changes to the dates and times.
Edit Entry window displays.
Note: Time entries that have already been approved cannot be edited.
6. Makes desired changes and select **Save**.

Using the Headcounts Window

Use the Headcounts window to view headcounts in real time by location. Display variance, schedule, and time for 60-, 30-, and 15-minute time slots. Limit times or show all 24 hours.

To use the Headcounts window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Review > Headcounts**.
Headcounts window displays.
3. Select the Headcounts type: Variance, Schedule, or Time and select a day.
Headcounts window displays the number of employees working by location for the day you select.
4. Select a radio button for time interval: 60 minutes, 30 minutes, or 15 minutes.
Headcounts window displays headcounts by location in the time interval you select.
5. Select the Variance tab to show variance from the schedule. If you click on the location, the Absent/On window displays.
Headcount window displays with a negative number if headcount is less than what is scheduled, and highlights the numbers in red.
6. Select the Schedule tab to show the number of employees who worked during an interval.
Headcount window displays the number of employees who worked, and highlights the numbers in green if they meet the schedule.
7. Select the Time tab to show the number of employees who are working at a given time.
Headcounts window displays the number of employees who are working, and highlights the number in green if they meet the schedule.
Note: If you select a Location, the information displays in the Absent/On window.



Using the Variance Window

Use the Variance window to analyze plan versus actual totals. View displays each location by employee name. Use Action icons to quickly access information and see totals for scheduled, actual, and variance for the time period you specify. You can display schedule only or schedule and leave.

To use the Variance window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Review > Variance**.
Variance window displays.
3. Select a time period. The default is Day. Select Week or Pay Period if desired.
OR
Select a Range and then use the calendar to select a From Date and a To Date. Select **Apply**.
Variance window displays the time period and lists employee names by location and plan versus actual totals.
4. Use the icons in the Action column to display Employee Contact information, Employee's three-week schedule, and Employee's time sheet.
5. Select a column heading to sort the table using that column.
6. To customize and display other filter options in your columns, select **Customize > Show Filter**.
Variance window displays filters for Scheduled, Actual, and Variance columns.
7. Type a number and then select the filtering options. They are: NoFilter, Equalto, NotEqualTo, GreaterThan, LessThan, GreatThanOr EqualTo, LessThanOrEqualTo, IsNull, or NotIs Null.
For Example: For Scheduled hours over 20 hours per week, type 20 in the Scheduled column and select the GreaterThan filter.

Using the Absent/On Window

Use the Absent/On window to list plan versus actual hours worked by each employee at a location for a day, week, pay period, or range. Sort the table by Employee Name or exception type using the drop-down list under VS (versus). Launch the Available Employees window as well as the Edit Entry window to make immediate adjustments from this window.

To use the Absent/On window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Review > Absent/On**.
Absent/On window displays.
3. Select a time period. The default is Day. Select Week or Pay Period if desired.
OR
Select a Range and then use the calendar to select a From Date and a To Date. Select **Apply**.
Variance window displays the time period and lists employee names by location and plan versus actual totals.
4. Sort the table using either the Employee Name column or select an exception from the drop-down list under the VS column.
Absent/On window refreshes to reflect your selection.
5. Use the icons in the Action column to display Employee Contact information, Employee's three-week schedule, and Employee's time sheet.
6. Select the employee's **Start** or **End** time.
Edit Shift window displays.



7. Make desired changes and select **Save**.
8. Select the **Assign** link.
Available Employees window displays.
9. Make desired changes and select **Save**.
Note: These adjustments may also be done in the Location portal depending on role privileges.
10. Select the time entry **Type** link.
Add Entry window displays.
11. Make desired changes and select **Save**.
12. Use the Actuals information displayed to see work on projects, tasks, and activities as well as status and hours.
13. Use the Mass link to add time entries to many employees in a location. Select **Mass > Add**.
Mass Add Time Entries window displays.
14. Select a **Location** and the **Employees**. Make changes or additions to the **Date**, **Times**, and **Project/Task** and select **Save**.
15. Use the **Mass** link to toggle the Update on and off. You can:
 - Update On > Toggle All Shifts
Check boxes display at the assigned hours with check marks in them. Clear the checks from the shifts you are not updating.
 - Update On > Toggle All Time
Check boxes display at the end of each shift worked with check marks in them. Clear the checks from the time entries you are not updating.
 - Update On > Update
Mass Update Time Entries window displays.
16. Select the check box next to the fields on the Mass Update Time Entries window you would like to update.
17. Select **Start Time**, **End Time**, and **Break Hours** as either Manual or Scheduled and enter information.
18. Select **Project/Task** and **Status**.
19. Type **Manager Notes** and designate the **Alert** status.
20. Select **Save**.
Absent/On refreshes and reflects the changes you made.

Using the Photos Window

Use the Photos window to view the pictures of employees as they clock in and out. Side-by-side photos display in the Photos window to ensure the same person clocks in/out and no one employee is punching in/out for other employees. Display the shifts for locations and list of employees scheduled to work.

To use the Photos window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Review > Photos**.
Photos window displays with employee name, photos, clock or card time on/off, and hours.
3. Select the time entry type, card, clock, or admin.
Edit Entry window displays.
4. Make any changes and select **Save**.



Using the Pay Period Section

The Pay Period section provides tools for finalizing pay periods. It includes:

- **Using the Summary Window** — displays a window containing bar graphs for Hours, Attendance (Location portal only), Status, and Time Sheets for the pay period. Includes hours by day, attendance exceptions by type (Location portal only), the status of unresolved errors, and the number of time sheets that have already been locked and/or approved. When you click on a bar graph, detailed information displays.
- **Using the Approvals Window** — allows you to view totals and approve time sheets of individual employees or in mass, i.e., lock and approve all time sheets. Can view time sheets by location or folder or the entire enterprise. Use icons under the Actions column to display other sections such as employee contact information, employee schedule information, and employee time sheet. Use the Actions tab to lock, approve, and unlock all time sheets.
Note: When time sheets are not approved due to errors on the time sheet, the following header displays on the Employee time sheet in red: **Has Errors**.
- **Using the Timesheet Window** — displays individual time sheets so you can view or edit them. You can choose a pay period, search for a last name, clock on or clock off for an employee, add a time entry, or use arrows to scroll or navigate through the list of employees alphabetically. When you add a time entry, the Type displays as admin in the windows in the Review section.

Refer to the following How To's.

Using the Summary Window

Use the Summary window to get a quick picture of the pay period. A bar chart displays hours, status, and time sheet status. In the Location portal, attendance and attendance exceptions also display.

To use the Summary window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Pay Period > Summary**.
Summary window displays a bar chart for each of the following: hours, status, and time sheet status.
3. The default window is **Today** to display a summary of the current pay period.
4. Use the left and right arrows to scroll back to previous pay periods or forward to subsequent pay periods.

Using the Approvals Window

Use the Approvals window to approve a pay period by location and time sheet. You can use the Action tab to perform the following: Lock, Unlock, and either Approve Pay Period, or if approved, Complete Pay Period. Use filters to display specific employee names, specific employee information, as well as employee time-related information.

To use the Approvals window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Pay Period > Approvals**.
Approvals window displays a window for displaying a summary of time sheet information for each location or folder.



3. Select the location or folder you would like to approve. Use the drop-down list to select a specific location, or use the arrows after the Approvals text box to scroll forward and backward through the list of locations.
The window displays a summary of the time sheet for each individual employee in that location.
Note: Time sheets can be open and edited from this page.
4. When a pay period is complete, an Actions button displays. Select the **Actions** button to perform these functions:
 - **Lock** - lock time sheets. No time entries can be entered or edited.
 - **Unlock** - unlock time sheets. Time entries can be entered or edited.
 - **Approve Pay Period** - approve pay period so it can be completed. Approving also Locks the time sheets. You can approve it in the Enterprise portal even if locations or employees have not approved time sheets.
 - **Complete Pay Period** - complete pay period so it can be exported to payroll. This action is added only when the pay period has been locked/approved.
5. Use the icons in the Actions column to display Employee Contact information, Employee's three-week schedule, and Employee's time sheet. See [Using Icons to Access Information](#).
6. To filter time-related information, use the filter options. Type a number and then select the filtering options. They are: NoFilter, Equalto, NotEqualTo, GreaterThan, LessThan, GreatThanOrEqualTo, LessThanOrEqualTo, IsNull, or NotIs Null.
For Example: For Regular hours over 20 hours per week, type 20 in the Regular column and select the GreaterThan filter.
7. To remove the filter, clear the number and select NoFilter.
8. To view, lock, and approve an individual employee timesheet, see [Using the Timesheet Window](#).

Using the Timesheet Window

Use the Timesheet window to access and edit an individual employee time sheet. You can view time entries and timesheet status, edit time entries, lock the time sheet for a pay period, and approve or unapprove the timesheet.

To use the Timesheet window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Pay Period > Timesheet**.
Timesheet window displays a window for displaying an individual employee's time sheet information for all assigned locations.
3. Select the employee whose time sheet you would like to review. Use the drop-down list to select a specific employee, or use the arrows after the Timesheet text box to scroll forward and backward through the list of employees.
4. If you have not already locked and approved the time sheets, you can make changes to time entries and use the links under Summary to Lock and approve an individual employee time sheet.
5. If you have already locked, approved the pay period, these actions are no longer available. See [Using the Approvals Window](#).

Using the Reports Section



The Reports section in the Time & Attendance module provides two types of automatically-generated reports: Roll Ups and Overtime Estimator. In addition, a Design link provides access to reports that your organization develops involving time-related Data Sources. Each is described in the following:

- [Using the Roll Up Reports Window](#) — allows you to summarize by project, project/task, activity, day, or employee. Shows totals for entry hours or calculated hours. Exports to Excel or CSV file.
- [Using the Overtime Estimator Window](#) — allows you to select a location and view specific employee information for a location. Also allows you to calculate overtime totals for each day in this week's schedule and flag absences.
- [Using the Designs Window](#) — allows you to access and display the results of custom-designed time-related reports that are created in the Reports section. These are read only, but you can copy them and create new designs based on them in the Reports section. See Reports Overview and Creating Report Designs. For assistance with developing a report design, [open a support case](#) and send it to ScheduleSource Support. Explain the data you would like to report on, and a technician can help you develop a design that produces those results.
- Time & Attendance Data Sources — provides you with a complete list of fields you can use to gather information, as well as a description of contents.

Refer to the following How To's.

Using the Roll-up Reports Window

Use the Roll-Up Reports window to create summaries of time-related data.

To use the Roll-Up Reports window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Reports > Roll Up**.
Roll-Up Reports window displays.
3. Select the time frame. Hover over the date and select: Day, Week, Month, or Pay Period.
4. Use the green arrows to scroll to a previous or next date.
5. Select the information to **summarize by**: Project, Project/Task, Activity, Day, or Employee.
6. Select the **show totals for**: Entry Hours or Calculated Hours.
7. Select the **Load** button.
Window displays the information available for the time frame and data you select.
8. Select the column heading to change order from ascending to descending and vice versa.

Using the Overtime Estimator Window

Use the Overtime Estimator window to predict estimates of overtime.

To use the Overtime Estimator window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Reports > Overtime Estimator**.
Overtime Estimator window displays.
3. Select a **Location** using the drop-down list.
Totals and absences of Employees assigned to the location display for the current week.
4. To view another Location, select it using the drop-down list.



5. Use icons to display related employee information. See [Using Icons to Access Information](#).

Using the Designs Window

Use the Designs window to display Reports, Charts, and Styles of reports developed to display time-related data.

To use the Designs window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Reports > Designs**.
Designs window displays.
3. Select a Report Design from the list of Reports.
Report displays in the Reports window.
4. Select the **Filter** link to specify a location. See [Using the Time Filter Window](#).
Report information displays for that location.
5. Select the time frame. Hover over the date and select: Day, Week, Month, or Pay Period.
6. Use the green arrows to scroll to a previous or next date.
Report information displays for that date.

Using Filter and Find Tools

The Time & Attendance module contains a great deal of specific information. Therefore, we provide several tools to help you quickly find the precise information you are looking for. They are:

- [Using the Time Filter Window](#) — use the Time Filter window to define a view for all windows. Once you set up this filter, it remains in effect when you navigate to other windows. To clear the filter, simply open the window, select clear, and select set filter.
- [Finding an Employee](#) — use the Employee Information window to search for an employee by last name or an external Id. Open a time sheet or employee information.
- [Finding a Location](#) — use the Location Information window to search for a location by name or an external Id. Open the Approval window for the specific location or location information.

Refer to the following How To's.

Using the Time Filter Window

Use the Filter link that displays on the toolbar as well as many of the Time & Attendance windows to launch the Time Filter window. Using this window, you can set or clear filters for a Folder, Location, Employee, and Crew.

Remember: Filters remain in effect until you clear them, even when you navigate to other windows.

To use the Time Filter window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Filter**.
Time Filter window displays.
3. Select one or more items you would like to use as a filter using the drop-down list.
 - Employee



- Crew
4. To clear the item from the filter, select [\[Clear\]](#).
 5. Select **Set Filter**.

Finding an Employee

Use the Find link to locate a specific employee record. You can search for the employee by Last Name or External Id.

To use the Find an Employee window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Find> Employee**.
Employee Information window displays.
3. Select the employee search method, either Lastname or ExternalId. Then, select the specific name or Id.
4. Select what you are looking for: either TS (time sheet) or Info (Information).
The employee time sheet or employee information displays, depending on your selection.

Finding a Location

Use the Find link to locate approval records or information about a location. You can search for the location by location Name or External Id.

To use the Find a Location window:

1. Select the **Time** link on the top menu.
2. On the toolbar, select **Find > Location**.
Location window displays.
3. Select the location search method, either Name or ExternalId. Then, select the specific location name or Id.
4. Select what you are looking for: either Review (Pay Period Approvals) or Info (Location Information).
The Pay Period Approvals or location information displays, depending on your selection. If location information, select **Open**.



References

Time & Attendance Data Sources

The following tables describe the data sources under Time & Attendance. They list the fields available and provide a brief description of contents. They include:

- [Attendance](#)
- [Processed Time](#)
- [Processed Time And Shifts](#)
- [Time](#)
- [Time and Shifts](#)
- [Time Audit](#)

Refer to the following data sources for Time & Attendance.

Attendance


The Enterprise portal manages these fields in Locations and Adding and Managing Locations.

Field	Description of contents
Active	A flag that indicates whether employee is available for use in scheduling shifts. Displays on reports as True if active and False if inactive. Status is active unless an inactive date is set on Employee Status window.
Address	Employee's street address. <i>(Entered in Address in the Employee information window.)</i>
Address2	Additional information for employee address. <i>(Entered in Address2 in the Employee information window.)</i>
AgreementType	Employee's agreement type as entered in Enterprise portal employee record. <i>(Go to Edit Employees > Agreements.)</i>
Attendanceld	Unique ID set by ScheduleSource on attendance entries.
BirthDate	Employee's birthdate. <i>(Entered in Birth Date in the Employee information window.)</i>
City	City of the employee address. <i>(Entered in City in Employee information window.)</i>
Country	Country of the employee address. <i>(Entered in Country in Employee information window.)</i>







Field	Description of contents
Created	Timestamp of when attendance was created (UTC).
CreatedBy	If exception created manually, name of user creating it.
CreatedLocal	Timestamp of when attendance was created (Local).
Date	Date of the attendance occurring.
DefaultLocation	Name of employee's default location.
DefaultLocationExternalId	External ID of employee's default location.
DefaultLocationId	Unique ID of default location, set by ScheduleSource.
EMail	Email of the employee. <i>(Entered in Email in Employee information window.)</i>
ExternalId	Employee ID for use with an external system, such as HR or Payroll
FirstName	Employee's first name. <i>(Entered in First Name in Employee information window.)</i>
FullName	Employee full name. Displayed as "Last, First".
HireDate	Employee Start Date.
LastName	Employee last name. <i>(Entered in Last Name in Employee information window.)</i>
Location	Name of location for shift or time entry.
LocationExternalId	External ID of the location.
Minutes	For some attendance records, how many minutes they were late or early.
Note	Note on the attendance record.
OrgEmployeeId	Unique ID of employee, set by ScheduleSource.
PhoneNo	Employee's phone number.
PhoneNo2	Additional employee phone number. <i>(Entered in Ph2 (cell) in Employee Information window.)</i>
PhoneNo3	Additional employee phone number. <i>(Entered in Ph3 (other) in Employee Information window.)</i>



Field	Description of contents
Points	Points for the attendance record, as defined on the attendance setup in the policy.
Policy	Indicates policy name entered in Employee Policy window in Organization > Policies and assigned to an employee when you assign an employee agreement. Use Employees > Mass-Assign or add a new employee agreement in Employees > Agreements and designate a policy related to the agreement.
Position	Indicates position name entered into Admin > Lists > Employee Positions and assigned to an employee when you assign an employee agreement. Use Employees > Mass-Assign or add a new employee agreement in Employees > Agreements and designate a position related to the agreement.
PostalCode	Employee's zip code or postal code.
Rule	Indicating the reason for the Attendance record (Late In, Late Out).
RuleId	Unique ID for rule, generated by ScheduleSource.
State	Employee's state (from Address settings).
TermDate	Termination or Inactive date of employee. (<i>Entered in Inactive Date in Employee Status window.</i>)
TimeZoneOffset	The hour difference between UTC time and the time zone setting for the employee. (<i>Selected under Employee Information > Time & Attendance.</i>)
TimeZoneUSDay	Indicates daylight savings for time zone: 1=Yes, i.e., Auto Adjust for daylight savings time or 0=No, i.e., do not adjust for daylight savings time.
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Employee. See Custom Fields Folder Overview.
UserName	Employee's username. (<i>Entered in Username/ID in Employee Information window.</i>)
Valid	Confirmed =1, Open = 0, Void = -1.
Validated	Timestamp (UTC) for validation.
ValidatedBy	Name of user validating the record.
ValidatedLocal	Local timestamp for validation.
 Count	A count of the Attendance records, grouped by the other fields selected.



Field	Description of contents
 MinutesAverage	Average of minutes of selected Attendance records, grouped by the other fields selected.
 MinutesTotal	Sum of minutes of selected Attendance records, grouped by the other fields selected.
 PointAverage	Average of points of selected Attendance records, grouped by the other fields selected.
 PointTotal	Sum of points of selected Attendance records, grouped by the other fields selected.

Processed Time

Processed Time is the calculated data for payroll. It's based on time entries, but contains additional information and records depending on overtime, differentials, and other policy configurations.

You can report on processed time data. Reports gather information from the following sources that are managed from the Enterprise portal:












- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.
- Billing information is specified in the Time > Configuration windows. See Time > Configuration and go to Pay Periods, Projects and Tasks, and Pay Rates.

Field	Description of contents
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. (Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.)
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (<i>Entered in Name in the Location information window.</i>)
Crew	Name employee's crew assignment.
Date	Date of the calculated hours. If entries span the "start of day" (usually midnight) there will be a processed time record for each date.








Field	Description of contents
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeNote	Textual note related to the Employee.
EnterpriseEmployeeId	Unique ID for employee, set by ScheduleSource.
EntryId	Unique ID for a time entry, set by ScheduleSource.
EstimatedPayAmount	Calculated Hours. Employee’s estimated Pay Rate.
EstimatedPayRate	Pay rate entered in the Employee Information window in the Location portal. Go to Edit Employee > Scheduling > Pay Rate.
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FirstName	Employee’s first name.
HolidayHours	Calculated Holiday hours.
LastName	Employee’s last name.
LeaveHours	Calculated Leave hours.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
OvertimeHours	Calculated Overtime hours.
OvertimePlusPremiumours	Calculated Overtime plus double time (premium) hours.
PayAmount	Bill rate * calculated hours total. (Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.)
PayPeriodId	Unique ID for the pay period, set by ScheduleSource.
PayRate	Pay rate from calculated time hours (Is set from the Time/Pay Rates configuration, with fallback to the Employee’s estimated Pay Rate.)
PremiumHours	Calculated Double-time hours.
RegularHours	Calculated Regular hours.
RestBreakHours	Calculated Rest Break hours.
ScheduleDate	Date of the calculated hours. (Not time entry nor shift date.)



Field	Description of contents
ScheduleDateMonth	Month of the schedule date.
ScheduleDateQuarter	Quarter of the schedule date.
ScheduleDateWeek	Week of the schedule date.
ScheduleDateYear	Year of the schedule date.
ScheduleDateYearMonth	The Year/Month of the schedule date.
ScheduleDateYearQuarter	The Year/Quarter of the schedule date.
ScheduleDateYearWeek	The Year/Week of the schedule date.
TotalHours	All calculated hours, minus Rest Breaks.
UnPaidHours	Calculated Unpaid hours.
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Employee. See Custom Fields Folder Overview.
 BreakHoursTotal	Sum of calculated break hours.
 EntryCount	Count of all processed records.
 HolidayHoursTotal	Sum of calculated Holiday hours.
 HoursTotal	summary of the total hours per a set filter
 LeaveHoursTotal	Sum of calculated Leave hours.
 OvertimeHoursTotal	Sum of calculated Overtime hours.
 PremiumHoursTotal	Sum of calculated Premium hours.
 RegularHoursTotal	Sum of calculated Regular hours.
 RestBreakHoursTotal	Sum of calculated Rest Break hours.
 TotalBillAmount	Sum of Bill Amount.
 TotalCalcHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, Holiday, & Unpaid hours.



Field	Description of contents
 TotalCalcPaidHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, & Holiday hours.
 TotalCalcWorkHours	Sum of calculated Regular, Overtime, Premium, & Break hours.
 TotalEstimatedPayAmount	Sum of estimated Pay Amount.
 TotalPayAmount	Sum of Pay Amount.
 UnPaidHoursTotal	Sum of calculated UnPaid Hours.

Processed Time And Shifts

This data source joins scheduled shifts to the time hour's data. Any shift that overlaps the time entry that is the source of the hours will be joined.

Note: There may be multiple shifts per hour and or time entry, which will produce duplicates in the report.

Use this data source for analysis, i.e., finding issues versus summarization (reporting totals). An example is to report on how many hours employees were paid (time data) by each station (schedule shift data).

Reports on Processed Time and Shifts gather information from the following sources that are managed in the Enterprise portal:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.
- Billing information is specified in the Time > Configuration windows. See Time > Configuration and go to Pay Periods, Projects and Tasks, and Pay Rates.

Field	Description of contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualBreakHours	Break hours stored on the time entry.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.



Field	Description of contents
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (<i>Entered in Name in the Location information window.</i>)
ClientFirstName	First name of client assigned to shift. (Optional, only available If Client Management Module is activated.)
ClientFullName	Full name of client assigned to shift, displayed as "Last, First".
ClientLastName	Last name of client assigned to shift. (Optional, only available If Client Management Module is activated.)
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.
CreatedDate	Date the time entry was created.
Date	Date of the shift start, or schedule date on time entry.
DiffHolidayHours	Total calculated differential Holiday hours.
DiffOTHours	Total calculated differential Overtime hours.
DiffPremiumHours	Total calculated differential Premium hours.
DiffRegHours	Total calculated Regular Holiday hours.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as "Last, First".
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmpNotes	Employee entered note on time entry.
EnterpriseRoundOff	Rounded Off time of time entry, in Enterprise time zone.






Field	Description of contents
EnterpriseRoundOn	Rounded On time of time entry, in Enterprise time zone.
EnterpriseUpdated	Timestamp of last update, in Enterprise time zone.
EntryId	Unique ID for time entry, set by ScheduleSource.
FinalHours	Final Hours on time entry, after adjustments.
FinalOff	Final (same as rounded) Off time for time entry, in UTC.
FinalOn	Final (same as rounded) On time for time entry, in UTC.
FirstName	Employee's first name.
HolidayHours	Calculated Holiday hours.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.
IsBreak	Flag that indicates whether the project/task used in the time entry is a break.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.
IsPaid	Flag that indicates whether the project/task used in the time entry is paid.
IsVoid	Flag that indicates if the time entry is an error and *has* been reviewed.
LastName	Employee's last name.
LeaveHours	Calculated Leave hours.
LocalRoundOff	Rounded Off time of time entry, in Location time zone.
LocalRoundOn	Rounded On time of time entry, in Location time zone.
LocalUpdated	Timestamp of last update, in Location time zone.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.















Field	Description of contents
MgrNotes	A note added to a time entry by the manager.
OverTimeHours	Calculated Overtime hours.
OverTimePlusPremiumHours	Calculated Overtime plus double time (premium) hours.
PayAmount	Bill rate * calculated hours total. Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
PayRate	Pay rate from calculated time hours. Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
PremiumHours	Calculated Double-time hours.
ProjectCode	The unique code for the Project of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
ProjectName	The name for the Project of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
RegularHours	Calculated Regular hours.
RestBreakHours	Calculated Rest Break hours.
SchDate	Date of the shift start, or schedule date on time entry. (This is the same as Date.)
ScheduleDate	Shift start date and time or date of time entry.
SchHours	Hours of the shift.
SchShiftBreak	Break hours of the shift.
SchShiftEnd	End time of shift. Only the time portion is returned.
SchShiftStart	Start time of shift. Only the time portion is returned.
ShiftId	Unique ID for a shift. Set by ScheduleSource.
ShiftNote	A comment added to shift.
ShiftOverlapEnd	The end time of overlapping time entry and shift segment.
ShiftOverlapHours	The hours within the time entry and shift overlapping segment.
ShiftOverlapStart	The start time of overlapping time entry and shift segment.



Field	Description of contents
StationAllowSwap	Displays True if allow swap is chosen for this station in Enterprise; False if not allowed to swap.
StationCost	Displays estimated cost of the shift based on the station's rate and shift hours.
StationId	Unique ID for station, set by ScheduleSource.
StationName	Name of Station.
StationOverlap	UNUSED
StationPayRate	Estimated pay for station.
StationRank	Priority of station versus other stations. 1-9 with 9 being the highest.
StationUserDefined1 - StationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Station. See Custom Fields Folder Overview.
TaskCode	The unique code for the Task of the time entry. (Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)
TaskName	The name for the Task of the time entry. (Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)
TimeCost	Estimated cost of time entry, based on time entry hours.
TimePayRate	Estimated pay rate, as stored on time entry.
TimeReason	Reason code for clocking.
TotalHours	All calculated hours, minus Rest Breaks.
Type	Type of time sheet entry, either a clock, card, or admin entry.
UnPaidHours	Calculated Unpaid hours.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdateUserId	User ID of the person who made the update.
 ActualHoursTotal	Sum of ActualHours on time entries.
 BreakHoursTotal	Sum of BreakHours on time entries.
 BusinessCount	Count of distinct locations for records selected.



Field	Description of contents
 EntryCount	Count of records selected.
 FinalHoursTotal	Sum of FinalHours on time entries.
 HoursTotal	Sum of calculated hours.
 OrgStationCount	Count of distinct stations on associated shifts.
 OvertimeHoursTotal	Sum of calculated Overtime hours.
 OvertimePremiumHoursTotal	Sum of calculated Premium hours.
 RegularHoursTotal	Sum of calculated Regular hours.
 SchHoursTotal	Sum of shift hours.
 ShiftOverlapHoursTotal	Sum of the overlapping hours of time entries and shifts.
 StationCostTotal	Sum of estimated cost of shifts based on station pay rate.
 StationCount	Count of distinct stations/locations.
 TimeCostTotal	Sum of time entry estimated cost, based on pay rate and final hours of entry.

Time

You can report on time-related entries. Reports gather information from the following sources that are managed in the Enterprise portal:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.
- Billing information is specified in the Time > Configuration windows. See Time > Configuration and go to Pay Periods, Projects and Tasks, and Pay Rates.

Field	Description of Contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.



Field	Description of Contents
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. <i>(Entered in Name in the Location information window.)</i>
CalcBreakHours	Calculated Break hours associated with time entry.
CalcDate	Date associated with calculated hours.
CalcHolidayHours	Calculated Holiday hours associated with time entry.
CalcLeaveHours	Calculated Leave hours associated with time entry.
CalcOverTimeHors	Calculated Overtime hours associated with time entry.
CalcOvertimePlusPremiumHours	Calculated Overtime and Premium hours associated with time entry.
CalcPremiumHours	Calculated Premium hours associated with time entry.
CalcRegularHours	Calculated Regular hours associated with time entry.
CalcUnPaidHours	Calculated UnPaid hours associated with time entry.
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.
CreatedDate	Date the time entry was created.



Field	Description of Contents
Crew	Name employee's crew assignment.
EMail	Employee's email address.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as "Last, First".
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeNote	Employee entered note on time entry.
EmpNotes	Notes related to the Employee entered on Employee Information window
EnterpriseEmployeeId	Unique ID of employee, set by ScheduleSource.
EntryId	Unique ID for time entry, set by ScheduleSource.
EstimatedPayAmount	Final Hours times Estimated Pay Rate, for non-error entries. If error, then is zero.
EstimatedPayRate	Employee estimated hourly rate of pay. PayRate is assigned to an employee in the Location portal under the Scheduling tab in the Employee Information window.
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FinalEnterpriseOff	Rounded Off time of time entry, in Enterprise time zone.
FinalEnterpriseOn	Rounded On time of time entry, in Enterprise time zone.
FinalHours	Final Hours on time entry, after adjustments.
FinalLocalOff	Rounded Off time of time entry, in Location time zone.
FinalLocalOn	Rounded On time of time entry, in Location time zone.
FinalOff	Final (same as rounded) Off time for time entry, in UTC.
FinalOn	Final (same as rounded) On time for time entry, in UTC.
FirstName	Employee's first name.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.



Field	Description of Contents
IsEmployeeApproved	Flag that indicates whether the employee has approved the time sheet.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.
IsPaid	Flag that indicates whether the project/task used in the time entry is paid.
IsReviewed	Flag that indicates whether the time entry has been reviewed. If still an error and is reviewed, then the IsVoid flag is set.
IsSheetApproved	Flag that indicates if the employee time sheet has been approved at the location.
IsSheetEnterpriseLocked	Flag that indicates if the time sheet has been locked at the enterprise.
IsSheetLocked	Flag that indicates if the employee time sheet has been locked at the location.
IsVoid	Flag that indicates if the time entry is an error and *has* been reviewed.
LastName	Employee's last name.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
OuterDate	UNUSED
PayAmount	Estimated pay based on time entry pay rate and final hours.
PayPeriodEnd	End date of the pay period.
PayPeriodId	Unique ID of the pay period, set by ScheduleSource.
PayPeriodStart	Start date of the pay period.






Field	Description of Contents
PayRate	Rate stored on the time entry. Its set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
Phone1	Employee's phone number.
Phone2	Additional employee phone number.
Phone3	Additional employee phone number.
ProjectCode	The unique code for the Project of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
ProjectName	The name for the Project of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
ScheduleDate	Date of start of time entry, in location time zone (date portion only).
ScheduleDateMonth	Month of the schedule date.
ScheduleDateQuarter	Quarter of the schedule date.
ScheduleDateWeek	Week of the schedule date.
ScheduleDateYear	Year of the schedule date.
ScheduleDateYearMonth	Year/Month of the schedule date.
ScheduleDateYearQuarter	Year/Quarter of the schedule date.
ScheduleDateYearWeek	Year/Week of the schedule date.
SchNotes	Manager entered notes on the time entry.
SheetEmployeeFullName	The full name of the employee in the time sheet.
SheetEmployeeId	Employee Id from the time sheet.
TaskCode	The unique code for the Task of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
TaskName	The name for the Task of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
TimeReason	Reason code for clocking.
TimeSheetId	Unique ID of time sheet, set by ScheduleSource.



Field	Description of Contents
TimeZoneOffset	Location's time zone number of minutes offset from UTC.
TimeZoneUsDay	Flag to indicate that the Location's time zone honors daylight savings.
Type	Type of time sheet entry, either a clock, card, or admin entry.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdateUserId	User ID of the person who made the update.
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Employee. See Custom Fields Folder Overview.
UserName	Employee's username as entered in Username/ID in Employee Information window.
 BillableHoursTotal	Sum of hours on time entries for Billable tasks, not including errors.
 BusinessCount	Count of distinct locations.
 EntryCount	Count of time entries.
 HoursTotal	Sum of all time entry hours, including errors.
 LeaveHoursTotal	Sum of hours on time entries for Leave tasks, not including errors.
 NotLeaveHoursTotal	Sum of hours on time entries for non-Leave tasks, not including errors.
 PaidHoursTotal	Sum of hours on time entries for Paid tasks, not including errors.
 SheetCount	Count of distinct time sheets the time entries are associated with.
 TotalBillAmount	Sum of Billable hours times billable rate.
 TotalCalcHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, Holiday, & Unpaid hours.
 TotalCalcPaidHours	Sum of calculated Regular, Overtime, Premium, Leave, Break, & Holiday hours.
 TotalCalcWorkHours	Sum of calculated Regular, Overtime, Premium, & Break hours.
 TotalEstimatedPayAmount	Sum of estimated Pay Amount.
 TotalPayAmount	Sum of Pay Amount.



Field	Description of Contents
 UnBillableHoursTotal	Sum of hours on time entries for non-Billable tasks, not including errors.
 UnPaidHoursTotal	Sum of hours on time entries for non-Paid tasks, not including errors.
 ValidHoursTotal	Sum of hours on non-Error time entries.

Time and Shifts

You can report on processed time data. Reports gather information from the following sources that are managed in the Enterprise portal:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.
- Station information is specified in the Add or Edit Station window. See Stations and Adding and Managing Stations.
- Billing information is specified in the Time > Configuration windows. See Time > Configuration and go to Pay Periods, Projects and Tasks, and Pay Rates.

Field	Description of contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.
BusinessName	The name of a location. (<i>Entered in Name in the Location information window.</i>)
BusinessNow	Current time at the location, when the report is run. (Useful in formulas)




Field	Description of contents
ClientFirstName	First name of client assigned to shift. (<i>Optional, only available If Client Management Module is activated.</i>)
ClientFullName	Full name of client, displayed as “Last, First”.
ClientLastName	Last name of client assigned to shift. (<i>Optional, only available If Client Management Module is activated.</i>)
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.
CreatedDate	Date the time entry was created.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as “Last, First”.
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeRank	Rank of employee.
EmpNotes	Employee entered note on time entry.
EnterpriseRoundOff	Rounded Off time of time entry, in Enterprise time zone.
EnterpriseRoundOn	Rounded On time of time entry, in Enterprise time zone.
EnterpriseUpdated	Timestamp of last update, in Enterprise time zone.
EntryId	Unique ID for time entry, set by ScheduleSource.
FinalHours	Final Hours on time entry, after adjustments.
FinalOff	Final (same as rounded) Off time for time entry, in UTC.
FinalOn	Final (same as rounded) On time for time entry, in UTC.
FirstName	Employee's first name.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.
IsPaid	Flag that indicates whether the project/task used in the time entry is paid.







Field	Description of contents
IsVoid	Flag that indicates if the time entry is an error and *has* been reviewed.
LastName	Employee's last name.
LocalRoundOff	Rounded Off time of time entry, in Location time zone.
LocalRoundOn	Rounded On time of time entry, in Location time zone.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.
MgrNotes	A note added to a time entry by the manager.
ProjectCode	The unique code for the Project of the time entry. <i>(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)</i>
ProjectName	The name for the Project of the time entry. <i>(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)</i>
SchDate	Schedule date of the time entry.
SchShiftBreak	Hours between break start and end.
SchShiftEnd	End time of shift. Only the time portion is returned.
SchShiftStart	Start time of shift. Only the time portion is returned.
ShiftId	Unique ID for a shift. Set by ScheduleSource.
ShiftNote	A comment added to shift.
ShiftOverlapEnd	The end time of overlapping time entry and shift segment.
ShiftOverlapHours	The hours within the time entry and shift overlapping segment.
ShiftOverlapStart	The start time of overlapping time entry and shift segment.
StationAllowSwap	Displays True if allow swap is chosen for this station in Enterprise; False if not allowed to swap.
StationCost	Displays estimated cost of the shift based on the station's rate and shift hours.
StationId	Unique ID for station, set by ScheduleSource.



Field	Description of contents
StationName	Name of Station.
StationOverlap	UNUSED
StationPayRate	Estimated pay for station.
StationRank	Priority of station versus other stations. 1-9 with 9 being the highest.
StationUserDefined1 - StationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Station. See Custom Fields Folder Overview.
TaskCode	The unique code for the Task of the time entry. <i>(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)</i>
TaskName	The name for the Task of the time entry. <i>(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)</i>
TimeCost	Estimated cost of time entry, based on time entry hours.
TimePayRate	Estimated pay rate, as stored on time entry.
TimeReason	Reason code for clocking.
Type	Type of time sheet entry, either a clock, card, or admin entry.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdatedUserId	User ID of the person who made the update.
 ActualHoursTotal	Sum of ActualHours on time entries.
 BreakHoursTotal	Sum of BreakHours on time entries.
 BusinessCount	Count of distinct locations for records selected.
 EntryCount	Count of records selected.
 FinalHoursTotal	Sum of FinalHours on time entries.
 HoursTotal	Sum of calculated hours.
 OrgStationCount	Count of distinct stations on associated shifts.
 SchHoursTotal	Sum of shift hours.



Field	Description of contents
 ShiftOverlapHoursTotal	Sum of the overlapping hours of time entries and shifts.
 StationCostTotal	Sum of estimated cost of shifts based on station pay rate.
 StationCount	Count of distinct stations/locations.
 TimeCostTotal	Sum of time entry estimated cost, based on pay rate and final hours of entry.

Time Audit

You can report on time-related data. Reports gather information from the following sources that are managed in the Enterprise portal:

- Employee information is specified in the Add or Edit Employee window. See Employees and Adding and Managing Employees.
- Location information is specified in the Add or Edit Location window. See Locations and Adding and Managing Locations.
- Billing information is specified in the Time > Configuration windows. See Time > Configuration and go to Pay Periods, Projects and Tasks, and Pay Rates.

Field	Description of contents
ActivityCode	Accounting code for a given activity entered in Time > Configuration > Activities. It is the code that identifies the activity.
ActivityName	Name of an activity entered in Time > Configuration > Activities. It is the name that identifies the activity.
ActualHours	Original clocked hours on time entry. (Before edits, rounding, etc.)
ActualOff	Original clock off time on time entry.
ActualOn	Original clock on time on time entry.
BillAmount	The product of the Bill Rate and the billable hours.
BillRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
BreakHours	Number of hours in breaks.
BusinessExternalId	External ID of location. The External Id is used to coordinate TeamWork with external systems. It is blank unless your company integrates data with an external system.



Field	Description of contents
BusinessName	The name of a location. (<i>Entered in Name in the Location information window.</i>)
ClockOffUserId	Unique ID of User who clocked the employee off.
ClockOnUserId	Unique ID of User who clocked the employee on.
CreatedDate	Date the time entry was created.
Crew	Name employee's crew assignment.
EMail	Employee's email address.
EmpAlert	A flag for the employee to alert manager of note.
EmployeeFullName	Employee full name. Displayed as "Last, First".
EmployeeId	Unique ID for the employee/location, set by ScheduleSource.
EmployeeNote	Employee entered note on time entry.
EmpNotes	Employee's email address.
EntryId	Unique ID for time entry, set by ScheduleSource.
EstimatedPayAmount	Final Hours times Estimated Pay Rate, for non-error entries. If error, then is zero.
EstimatedPayRate	Employee estimated hourly rate of pay. PayRate is assigned to an employee in the Location portal under the Scheduling tab in the Employee Information window.
ExternalId	Employee ID for use with an external system, such as HR or Payroll.
FinalHours	Final Hours on time entry, after adjustments.
FinalOff	Rounded Off time of time entry, in Location time zone.
FinalOn	Rounded On time of time entry, in Location time zone.
FirstName	Employee's first name.
IsBillable	Flag that indicates whether the project/task used in the time entry is billable.
IsError	Flag that indicates if the time entry has been flagged as an error.
IsLeave	Flag that indicates whether the project/task used in the time entry is a leave.














Field	Description of contents
IsPaid	Flag that indicates whether the project/task used in the time entry is paid.
IsSheetApproved	Flag that indicates if the employee time sheet has been approved at the location.
IsSheetLocked	Flag that indicates if the employee time sheet has been locked at the location.
LastName	Employee's last name.
LocationOff	A string that stores a value that determines where the clock Off occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationOn	A string that stores a value that determines where the clock On occurred. It might be an IP address, phone number, or the ID of a physical clock.
LocationUserDefined1 - LocationUserDefined6	Custom field(s) identified in Admin > Custom Fields > Location. See Custom Fields Folder Overview.
OuterDate	UNUSED
PayAmount	Estimated pay based on time entry pay rate and final hours.
PayPeriodEnd	End date of the pay period.
PayPeriodId	Unique ID of the pay period, set by ScheduleSource.
PayPeriodStart	Start date of the pay period.
PayRate	Rate stored on the time entry. Is set from the Time/Pay Rates configuration, with fallback to the Employee's estimated Pay Rate.
Phone1	Employee's phone number.
Phone2	Additional employee phone number.
Phone3	Additional employee phone number.
ProjectCode	The unique code for the Project of the time entry. <i>(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)</i>
ProjectName	The name for the Project of the time entry. <i>(Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.)</i>
ScheduleDate	Date of start of time entry, in location time zone (date portion only).
ScheduleDateMonth	Month of the schedule date.



Field	Description of contents
ScheduleDateQuarter	Quarter of the schedule date.
ScheduleDateWeek	Week of the schedule date.
ScheduleDateYear	Year of the schedule date.
ScheduleDateYearMonth	Year/Month of the schedule date.
ScheduleDateYearQuarter	Year/Quarter of the schedule date.
ScheduleDateYearWeek	Year/Week of the schedule date.
SchNotes	Manager entered notes on the time entry.
SheetEmployeeId	Employee Id from the time sheet.
TaskCode	The unique code for the Task of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
TaskName	The name for the Task of the time entry. (<i>Entered on the Add or Edit Project window under Time > Configuration > Project & Tasks.</i>)
TimeSheetId	Unique ID of time sheet, set by ScheduleSource.
TimeZoneOffset	Location's time zone number of minutes offset from UTC.
TimeZoneUsDay	Flag to indicate that the Location's time zone honors daylight savings.
Type	Type of time sheet entry, either a clock, card, or admin entry.
UpdatedDate	Date of an update to an entry in a time sheet.
UpdateReason	Internal code for the type of update.
UpdateUserFullName	Full name of user who last updated the time entry.
UserDefined1 - UserDefined6	Custom field(s) identified in Admin > Custom Fields > Employee. See Custom Fields Folder Overview.
UserName	Employee's username. (<i>Entered in Username/ID in Employee Information window.</i>)
 BillableHoursTotal	Sum of hours on time entries for Billable tasks, not including errors.
 BusinessCount	Count of distinct locations.
 EntryCount	Count of time entries.



Field	Description of contents
 HoursTotal	Sum of all time entry hours, including errors.
 LeaveHoursTotal	Sum of hours on time entries for Leave tasks, not including errors.
 NotLeaveHoursTotal	Sum of hours on time entries for non-Leave tasks, not including errors.
 PaidHoursTotal	Sum of hours on time entries for Paid tasks, not including errors.
 SheetCount	Count of distinct time sheets the time entries are associated with.
 TotalBillAmount	Sum of Billable hours times billable rate.
 TotalEstimatedPayAmount	Sum of estimated Pay Amount.
 TotalPayAmount	Sum of Pay Amount.
 UnBillableHoursTotal	Sum of hours on time entries for non-Billable tasks, not including errors.
 UnPaidHoursTotal	Sum of hours on time entries for non-Paid tasks, not including errors.
 ValidHoursTotal	Sum of hours on non-Error time entries.



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