Supervisor Overview

NOVAtime®

Overview

The purpose of this document is to provide high-level overview of the Supervisory tasks commonly performed.

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Supervisor Overview Summary

A supervisor generally has two roles in Timekeeper: employee and supervisor. Thus, the supervisor will generally have two accounts or logins.

The Employee account/login is for the tasks as an employee such as submitting requests for leave and reviewing and submitting their personal timesheet.

The other login is for supervisory tasks such as approving employee's leave requests, reviewing and approving subordinate employee's timesheets. You may have two separate logins for each account, depending on your organization's configuration.

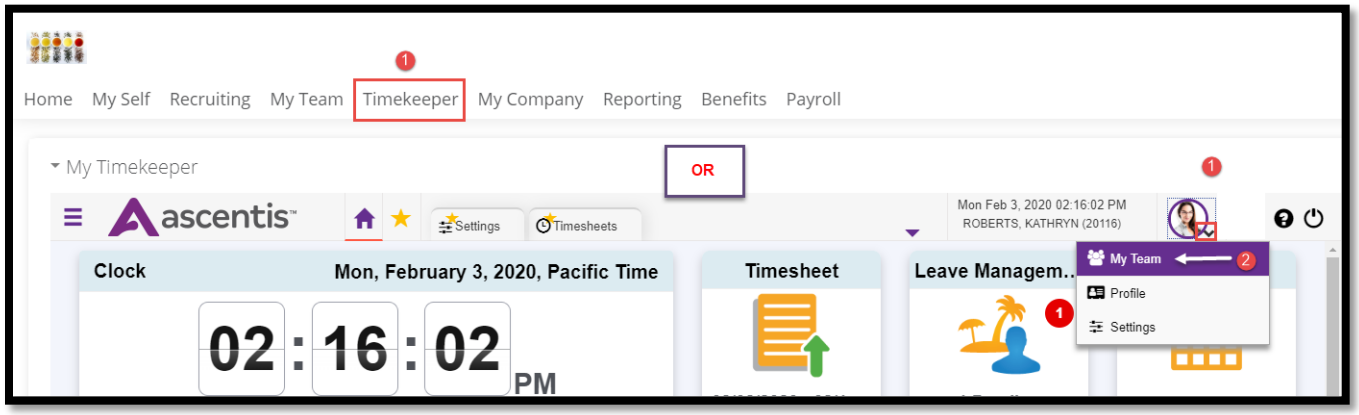
This document provides a high-level overview of the supervisory tasks commonly performed.

Login

Description

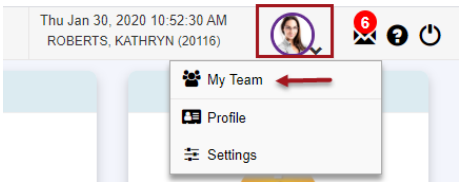
There are three methods for accessing a Timekeeper Supervisory account:

1. Single Sign-on through Ascentis HCM. If enabled, by selecting Timekeeper from the top menu bar you will automatically be logged on to the Timekeeper system as seen below.



*** Single Sign-On ***(external from Ascentis HCM)*** please contact your Administrator for Single Sign-On activation and login details.

2. Through the Employee login portal (if enabled) (logging into Timekeeper with your Employee ID and password, you can toggle to your Supervisor account by clicking on the arrow in the lower right corner of the silhouette in the upper right corner and selecting “My Team”



3. Logging in directly to the Supervisory account

Using the link provided by your Timekeeper Administrator, log in with your supervisory account name. The first time you login, enter anything in the password field and click “Login.” You will be prompted to create your password.

Once logged in, you will be able to approve employee leave requests and review and approve timesheets.

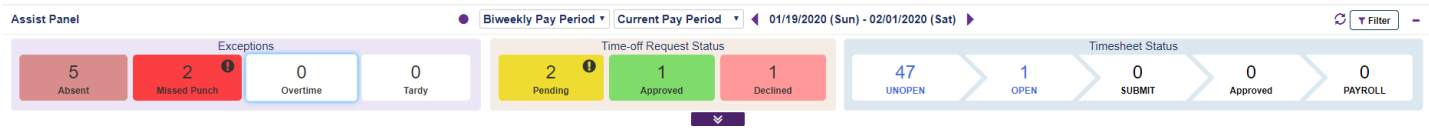
Dashboard

Description

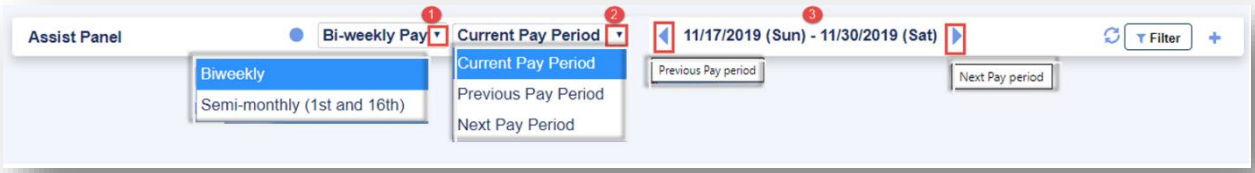
The Dashboard is typically the first page to display after login. The dashboard contains gadgets that provide either high level information about your workforce or displays information with shortcuts allowing you to accomplish specific tasks quickly.

To navigate to the dashboard from any page in Timekeeper, click on the home icon in the upper left corner.

Assist Panel:
The most useful tool on the dashboard is the “Assist Panel” which displays at the top of the screen. This panel displays configured exceptions (e.g., Missed Punches), leave requests for the current pay period, and timesheet status workflow summary.



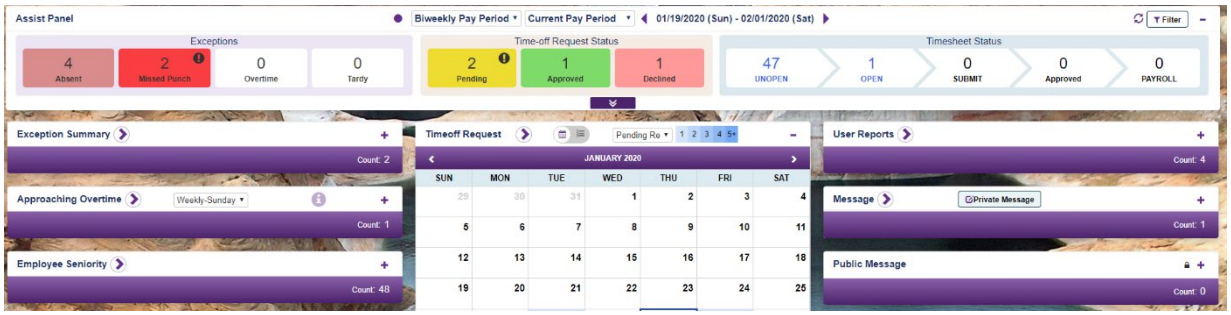
Across the top is the pay period selection tool. Use the arrows to navigate to the desired current or previous pay period.



On the left side is a summary of exceptions on your employee's timesheets. Typically, the primary exception for supervisors to be aware of are employee with missed punches. Clicking on the number in this cell will take you directly to the timesheet pages of those employees with missed punches.

The center area of the Assist Panel shows a summary of any leave requests that require your attention. The number of pending leave requests for leave in the current pay period are displayed in yellow in the "Pending" box. Clicking this box will take you directly to the PTO approval area.

Finally, on the right side is a workflow summary of the status of timesheets. Timesheets that are in "open" status are still being reviewed and edited by the employee. Timesheets in "Submit Status" are ready for your review and approval. Approved Status indicates that you have reviewed and approved the timesheet and they are ready for payroll processing. Clicking in any of these cells will take you directly to the Employee Timesheets in Open or Submit status.



Other informational cards may be displayed depending on the dashboard design your organization has configured.

Approving Leave Request

Description

Before approving any timesheets, be sure to address pending leave requests. Look at the PTO Status area on the Dashboard Assist Panel. Pending requests for the selected pay period will be displayed here.

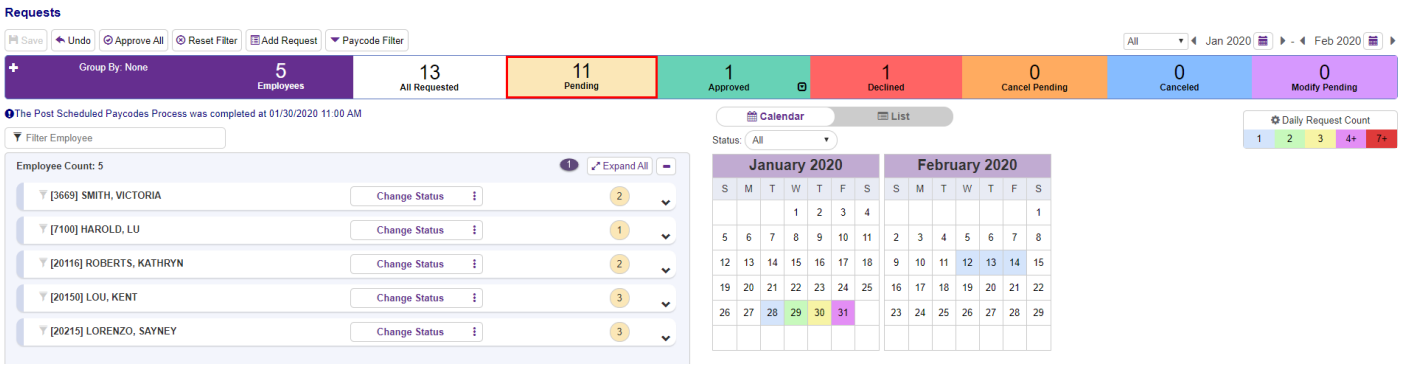
There are two ways to get to the leave approval request area.

1. Click on the exclamation mark in Pending Requests box

2. Click on the arrow on the Leave Management card. There are multiple ways to approve leave time on this page, but this document will demonstrate one method.

When the “Requests” tab is open, a calendar will be displayed on the right side of the screen that displays the number of requests for each day. This screen defaults to show pending requests - as designated by the box in the PENDING area at the top. If you want to view all requests, click ALL Requested. To view Approved Requests, click the approved Box.

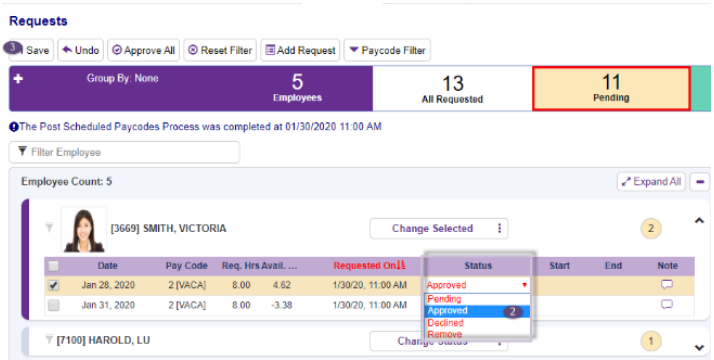
There are numerous ways to review and approve leave on this page. This document will focus on two approaches.



1. Click on the “Expand All button on the right corner” view to view all requests by employee. ***(Refer to image above)***

2. In each employee box, click on the dropdown cell for each request and select Approved.

3. Do this for each set of requests by employee and then click the save button in the upper left corner.



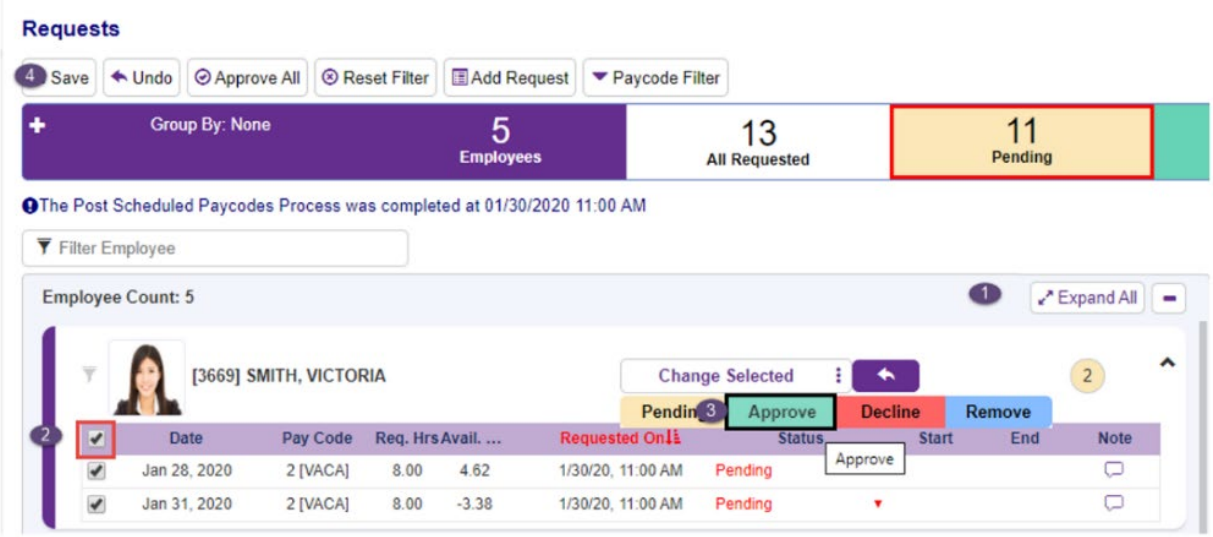
Change status for multiple time off requests.

1. Click on the “Expand All” button on the right corner to view all requests by employee.

2. For each employee, click on the box, to the left of “Date” column this will select all pending requests for that employee.

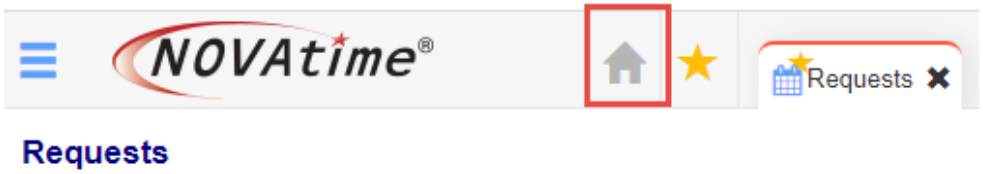
3. “Change Selected,” option allows user an opportunity to change status of all selected request to approve, decline or to a remove request status. Do this for each set of requests by employee.

4. Click the save button in the upper left corner.



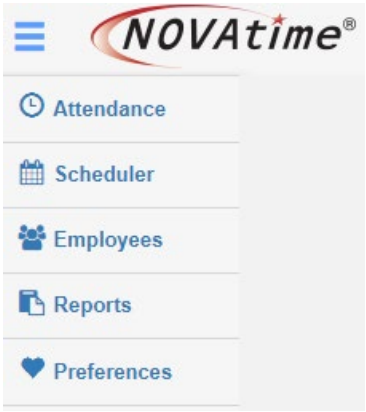
Approving a leave request will result in the leave time appearing on each employee’s timesheet. Another option for handling a leave request is to Decline the request. Although Remove a request is an option, we recommend that you not remove a request in order to maintain an audit trail for each employee’s requests.

To return to the Dashboard, click the Home icon in the upper left corner of the screen.



Categories

Description



The Categories are accessed by clicking on the hamburger icon in the upper left corner of the Timekeeper screen. Depending on your configuration, you may have one or more of these pages.

Attendance: The attendance category contains the timesheets and leave accrual records. Supervisors will spend most of their time on the Employee Timesheet pages

Scheduler: Templates, Freeform, Recap, and Calendar
* Schedules necessary for several things:
    1. Show a supervisor if an employee is absent (scheduled to work)
    2. Show Tardy or Early punches
    3. Automatic Meal Deductions

Some agencies will build and use Shifts that will automatically populate the scheduler. Check with your Timekeeper Administrator.

Employees - These pages contain all Employee information and codes used in Timekeeper. A supervisor's access to the Employee pages varies from organization to organization.

Reports - Variety of reports are available here including timecard reporting, attendance, leave time, labor costing, etc.

Preferences: Profile, Preferences and Delegation:
Profile: * Change your password here
* Enter your preferred email address - important if your organization is using Timekeeper for leave requests. Remember, to SAVE.

Preferences:
The ***Preferences*** page is used by system users to change their preferences for various system features. The commonly configurable parameters are:

- Employee List Display number per page
- Exceptions
- Summary page columns
- Dashboard auto launch
- User/Report Display preferences

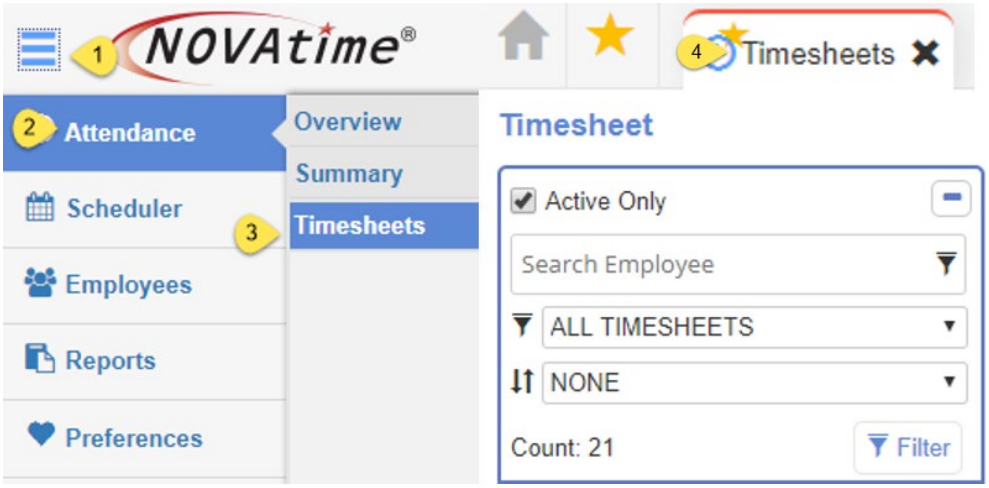
Delegation:
This is where the Delegation set-up lives. This page is used to designate system users who will manage your employees while you are unavailable. The system automatically sends an internal private message to the delegate when the delegation is first configured, but it does not automatically send reminders as the delegation day approaches or is activated by a timesheet event. Delegation access is based on the selected date range. Once the dates have passed the delegate user will not have any access to the system user's employees as a delegate. (configuration required and may not be applicable to your organization)

Attendance / Timesheet

Description

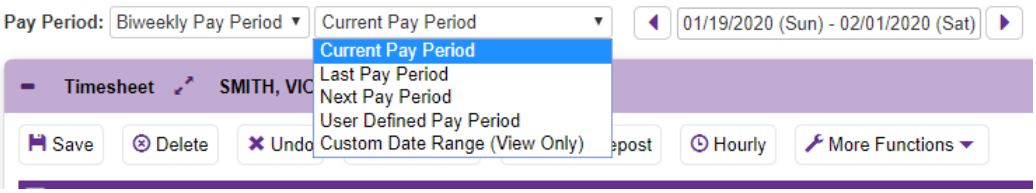
To navigate to an employee's timesheet:

1. Click on the hamburger icon.
2. Select "Attendance"
3. Select "Timesheets"
4. To make the Timesheet page available as a favorite for future sessions, click on the Clock icon on the tab at the top of the screen.



Employee Search Bar appears on the left sidebar and allows supervisors to search or use filters to select the timesheets for review.

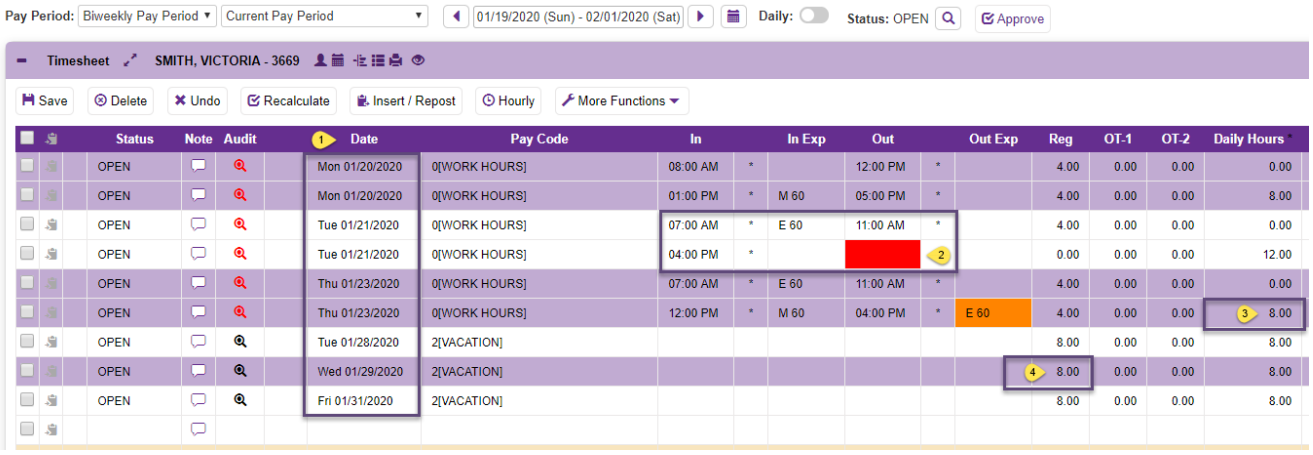
Pay period selection – The pay period dates are displayed across the top of the timesheet. Use the arrows to navigate to adjacent pay periods or use the drop down to select a custom date range.



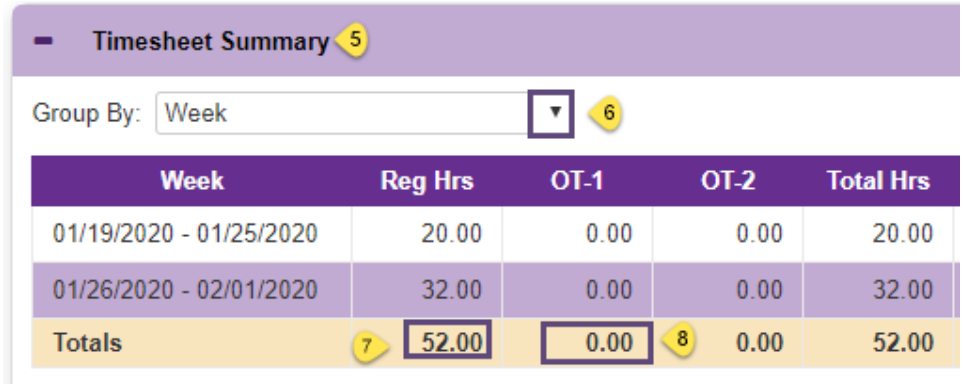
Reviewing a Timesheet

When reviewing an employee's timesheet verify:

1. All workdays for pay period are accounted for.
2. All required punches have been entered. For employees who are required to document their meal periods, there should be four punches per day as illustrated below.
   Missed Punches will display when there is an incomplete pair of punches. Be sure to fix these before attempting to approve the timesheet. (see Missed Punches below)
3. Verify daily total hours are correct.
4. All leave requests for the current pay period have been approved and are displayed on the timesheet?



5. Another way to view total hours worked by week is to open the Timesheet Summary section below the main timesheet.
6. Use the dropdown box next to "Group by:" to display time by pay week.
7. A total of non-overtime hours are displayed in the Reg column.
8. A total of overtime hours are displayed in the OT column(s).



Week	Reg Hrs	OT-1	OT-2	Total Hrs
01/19/2020 - 01/25/2020	20.00	0.00	0.00	20.00
01/26/2020 - 02/01/2020	32.00	0.00	0.00	32.00
Totals	7 52.00	0.00	8 0.00	52.00

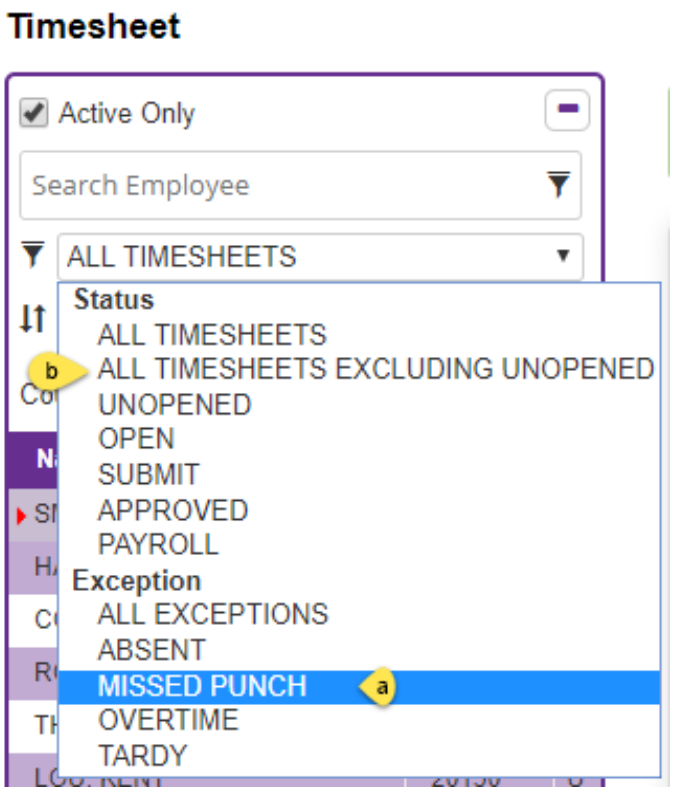
Missed Punches: Timekeeper, calculates work time as a result of In/Out punch pairs. For example, an "In" punch in the morning and an "Out" punch at the end of the day creates a pair. Additional punches may occur if the employee punches in and out for lunch. If an employee forgets to punch during one of these times it will be identified as a "missed punch."

There are several ways to identify timesheets with missed punches:

1. Reviewing each timesheet individually

2. Click in the "All Timesheets" cell in the Search bar and select "Missed Punch" from the drop-down list. **(a)**

3. Use the dashboard Exception Summary in the Assist Panel. Click on Missed punches. This will take you to a filtered list of all employees with missing punches. After you are done fixing punches be sure to click on the "Missed Punches" dropdown box in the employee tree on the left sidebar and select "All timesheets excluding unopened" to see all active timesheets for that pay period again. **(b)**



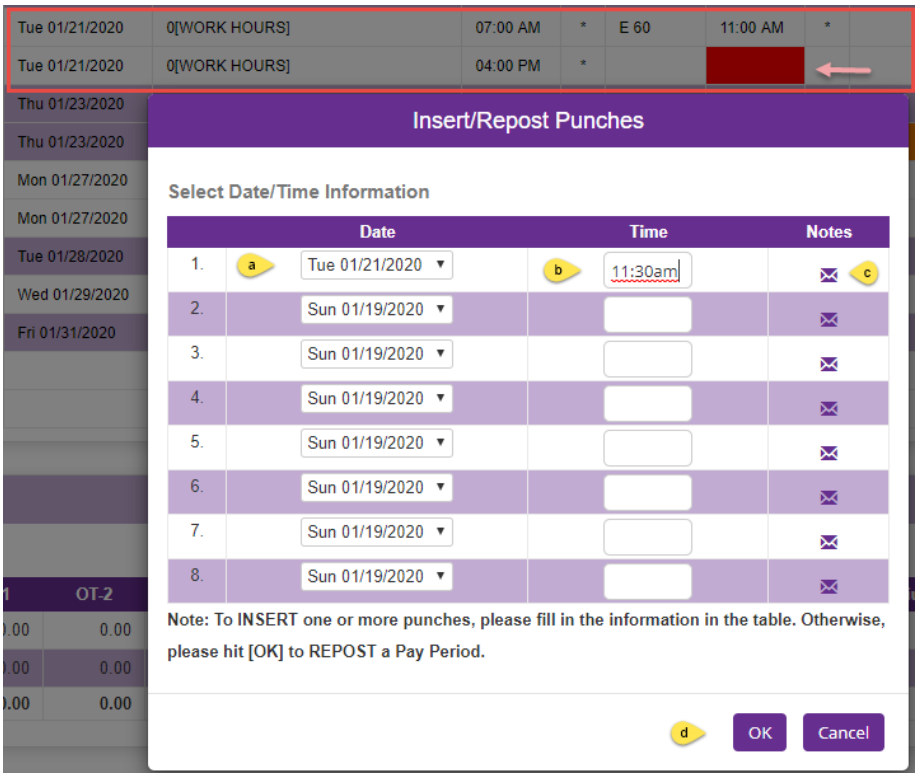
How to correct Missed Punches?

- If the missing punch is for *last* punch of the day (e.g., 5:00 p.m.) the supervisor can enter the missing punch directly onto the timesheet.

- Insert/Repost - always the preferred method. If the missing punch is the first punch of the day or a mid-day punch using the Insert/Repost button will allow the supervisor to insert the punch in the correct cell on the timesheet are realign, or repost, the other punches for the day.

Steps to using Insert/Repost:

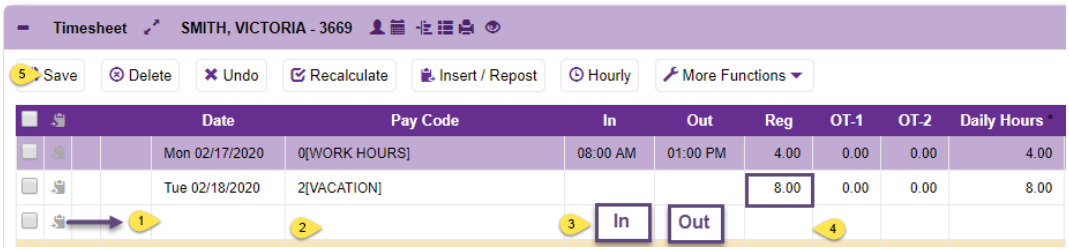
1. Identify the date/time for all punches to be added to the timesheet.
2. Click the Insert/Repost button
3. Enter the missing punch:
   a - Select the correct date from the dropdown menu in the Date column.
   b – Enter the time of the missing punch. Be sure to designate a.m. or p.m. to ensure a correct entry. E.g., 1:00p or 1p or 1300 (military time)
   c – Enter a note (optional)
   d - Click OK.
   e - Click OK in the message box that appears next.



Adding hours directly to a timesheet

Occasionally, a supervisor must enter hours directly on an employee's timesheet.

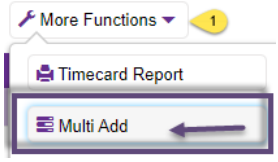
1. Click in an empty row on the employee's timesheet.
2. Select the Date from the drop-down box in the Date column.
3. Select the desired pay code.
4. Enter the number of hours in the Reg Column for non-work time.
    a. **If work hours, then enter the In and the Out times in the in/out columns.
5. Click Save



Rounding: In and Out punches can be rounded in a variety of ways. Check with your Administrator to learn how your organization is rounding punches. For example, if punches are being rounded to the nearest quarter hour, a punch that occurs at 6:55 a.m. will be rounded to 7:00 a.m. A punch that occurs at 7:09 a.m., will be rounded to 7:15 a.m.

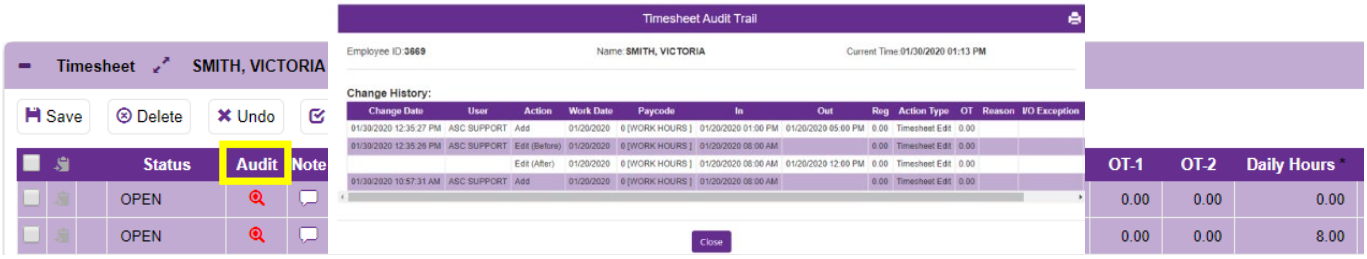
Lunch deductions: Depending on your organization's configuration, some employees may have a schedule that automatically deducts time for a meal (e.g., 30 minutes). These types of automatic deductions are driven either by the schedule or the shifts that the employee has been assigned to. Check with your Administrator on how to adjust a timesheet when an employee works through his/her scheduled meal break.

Multi-add: Use this feature when you want to add identical punches to more than one employee. Select your employees, date, pay code and number of hours (or the in/out punch times). Click "Process".



SAVE button: Remember that "SAVE" is your friend. Anytime you make a change or add something to any page, Attendance, Schedules, Recap, etc., be sure to click the SAVE button.

Audit trail: Anytime you see a magnifying class icon on a page, you can click to see an audit trail for that page or function. For example, there is an audit icon on every line of the timesheet.



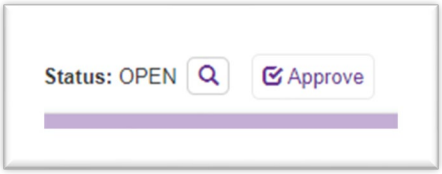
Click on this icon to view when an employee punched, what device s/he used (clock, web, phone), and who made any changes to that punch.

Before approving approve timesheets:

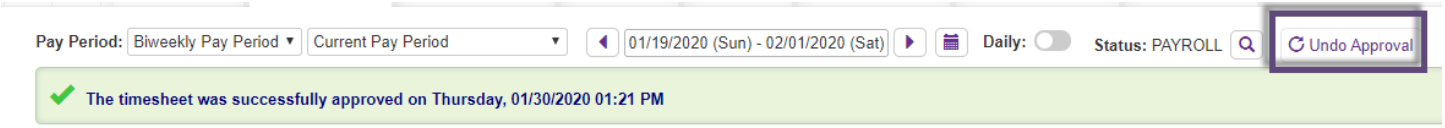
Fix all missed punches.
Ensure all hours are accounted for including leave, points, etc.
Check for minimum number of hours.
Click "Approve" button at top center of timesheet.

To approve a timesheet:

Once you have reviewed the timesheet and approved all leave requests for the pay period, you can approve the timesheet by clicking the Approve button at the top of the timesheet.



Reopening a timesheet from the Timesheet page – Once a supervisor has approved a timesheet it is locked and cannot be edited. If additional entries or adjustments are needed and the timesheet is still in "Approved" status, the timesheet may be reopened, depending on the organization's configuration. Click the "Undo Approval" box next to the Timesheet Status indicator. This will move the timesheet status back one level to enable additional edits. Reapprove the timesheet when finished.



Attendance/Summary

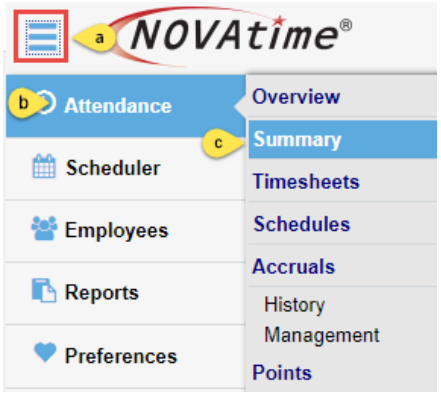
Description

The Summary page gives supervisors an overview of the timesheets for all their employees. Timesheets can be approved from this page, however, proceed with caution. Before approving timesheets from the summary page, the supervisor should ensure that all employee's timesheets are complete and all leave requests for the pay period have been addressed.

Reopening a timesheet from the Summary page:

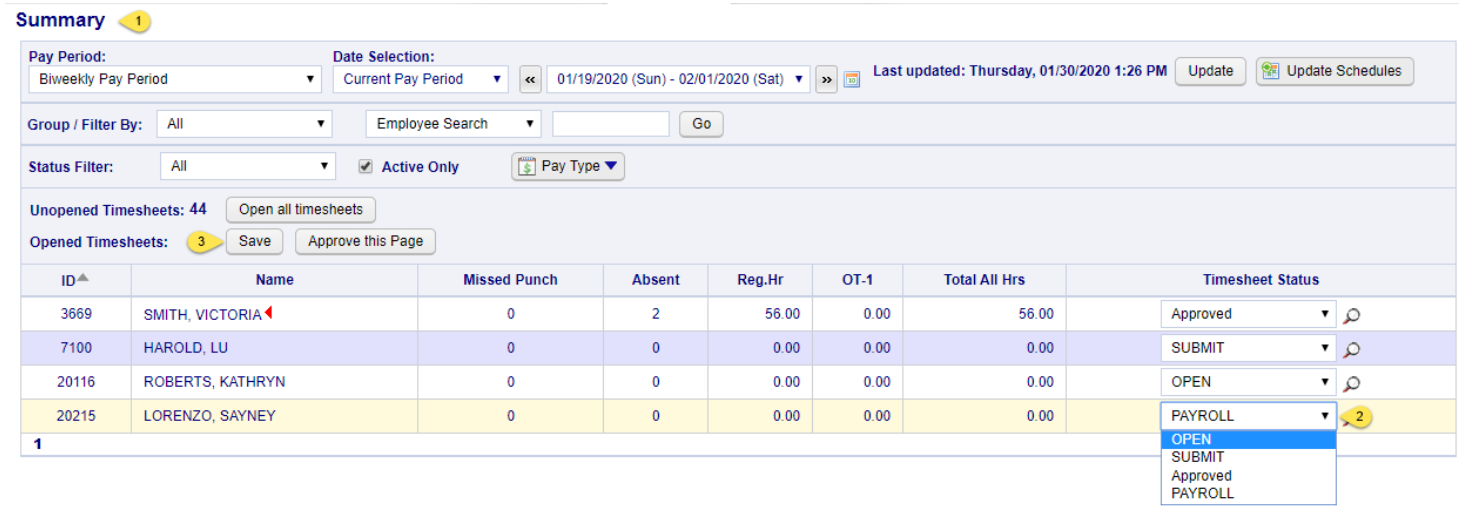
Once a supervisor clicks the Approve button on a timesheet, the timesheet is locked and cannot be edited. If additions or changes need to be made to a timesheet, the timesheet needs to be reopened.

a. Click on the "Hamburger" icon
b. Select "Attendance"
c. Select "Summary"



From the Summary Tab change the timesheet status:

1. Summary
2. Using the dropdown box in the Timesheet Status column, change the status to "Open" or "Submit"
3. Save



In General: Check the following items when reviewing timesheets:

TIMESHEET CHANGES

- Add Punches using Insert/Repost: use this function whenever possible. This function will bring in the default pay code. If you need to add regular hours, click the Insert/Repost button and enter the day and times, click ok and it will realign the timesheet. Also, use Insert/Repost if an employee has missed a punch and the system will place the punch where in needed to be. For example, if the employee forgot to punch out for lunch, just enter the punch with Insert/Repost, and the punch is where it belongs in the day.
- Adjust a Punch: Click in the cell with the time you need to adjust – override the time, then click the Save button on the top of the time sheet. E.g., employee forgot to punch in at 7:00am and so he punched at 9:00am when he remembered. Once you've confirmed the correct time to be inserted, adjust/change the punch in time.
- After making an adjustment: Click the recalculate button, to have the timesheet recalculate to adjust the hours for the changes. (Not necessary when using Insert/Repost)

ADD DAY FOR PAID TIME OFF (SICK, VACATION, JURY DUTY, ETC.)

- Approve employee leave requests for the pay period.
    - Use the Dashboard gadget or
    - Navigate from the hamburger icon to the Scheduler / Requests page
- If the there was no employee leave request, you can add leave time directly to the timesheet:
    - Click on empty row in the date column. A drop down of the days for that payroll will appear and pick the day you need to add,
    - Click in, or tab to, the pay code column and pick the proper time off.
    - Click in, or tab to, the regular hours next column and add times (for regular work hours) or tab to the "Reg" column.

PUNCHES MISS MATCHED

- Employee accidentally punched twice: Click on the first punch that needs to be deleted and push delete on your keyboard. Now you will see that the punches are miss aligned in the system – DO NOT ALTER.
    - Click Insert/Repost button – no need to enter anything.
    - Click OK button
    - The system will review punches and realign them for the day.