Time Dashboard – Perform Time

To help supervisors and managers manage their employees' time and attendance information, a dashboard is available to quickly display some of the most frequently needed data.

The dashboard features the following widgets:

- Current Employee Status
- Approaching Overtime
- Time Card Exceptions
- Approvals

Navigating through the Dashboard.

Here is an overview of the Time Dashboard settings and functions.

1. To access the dashboard, hover over Payroll and click on Time Dashboard.

2. First verify that the necessary client number and name is selected.

3. Next you may select the necessary Paygroup.

4. Clicking on an employee’s name will take you directly into their time card.

5. **Current Employee Status**
   This widget allows you to see who have punched in for the day, who is out on break or lunch, who has left, and who is absent for the selected client and paygroup.

6. **Approaching Overtime**
   This widget will help you control labor costs by seeing which employees are quickly approaching overtime for the week.

7. **Time Card Exceptions**
   Quickly see which employees have ‘missing punches’ or other time card exceptions that need to be resolved for the current pay period.

8. **Approvals**
   See each employee’s hours for the previous pay period and approve the time card hours without having to go through each employee individually.

Screenshots are continued on the next page.
Time Card Functionality – Perform Time

Within Perform, supervisors will have access to any employees which list them as the person they Report To on their personal Company > Current Position page. Supervisors are able to modify employee time cards, and approve the employee’s time before it gets submitted to Payroll.

Note: A user's security roles and assignments will determine which employees they will be able to see for a client.

Follow these steps to learn more about the Time Card:
- Time Card Navigation and Settings.
- Time Card Punches, Hours, and Other Pay.
- Time Card Exceptions.

Time Card Navigation and Settings.

Here is an overview of the Time Card settings and functions.

1. You can navigate to the next or previous period by using the Previous or Next buttons.

2. You can also view a specific date by using the Select Date box. The date range being viewed will persist, even when switching to view different employees.

3. By clicking Time Card Settings button, configuration options will appear that will change the way the time card is viewed. (Descriptions on the next page.)
   - **Show times in 24 hour format** - changes the punch in and out times from a 12 hour format to a 24 hour format.
   - **Show hours in hour-minute format** - changes the values in the Hours column to be viewed in "hour-minute" format rather than in decimal format.
   - **Number of decimal places** - changes the number of decimals shown in the Hours column.
   - **Display period** - changes the displayed view between the employee’s pay period and their overtime week.

4. If the time card has been saved, but other edits have been made to the employee, such as a policy addition or deletion, then the time card would need to be recalculated to process the time card. This can be done by clicking the Recalculate Time Card button.

Screenshots are continued on the next page.
Updated Version of Time Card

**View Settings**

- **Show times in 24 hour format** - changes the punch in and out times from a 12 hour format to a 24 hour format.
- **Show hours in hour-minute format** - changes the values in the Hours column to be viewed in "hour-minute" format rather than in decimal format.
- **Display First and Last punches of each day** – allows a user to see punches in the collapsed daily summary bar.
- **Number of decimal places** - changes the number of decimals shown in the Hours column.
- **Display period** - changes the displayed view between the employee's pay period and their overtime week.
- **Daily Summary** – users may choose to have the summary bars expanded or collapsed.

Previous Version of Time Card
**Time Card Punches, Hours, and Other Pay.**

When adding new punches on the time card, hours are displayed for the punches prior to saving. Note that this does not work when editing punches, as hours may already exist.

When adding in punches, the system has a quick method for input. It can support all formats including shorthand. For example, the system can handle "5p", "7pm", "20:00", and "11:55 PM.

The quick method of entering punches on the Time Card will assume an "Auto" In/Out status, meaning that the system can switch punches to be IN or OUT as it sees fit to correctly pair punches together.

**Updated Version of Time Card**

1. To add a punch, first expand the day you would like to edit. Click + Add, then + Punch.

2. Type in a time in the Time field.

3. Another option of editing punches is to click the clock icon next to the Time field.
   - **Punch Time** - Can you the dropdown boxes to easily select a time to enter into the Time Card.
   - **Activity Type** - Pick what type of activity the punch should be.
   - **Status Type** - Pick whether the punch should be an In or Out punch.
   - **Department** - Pick a department for the punch.
   - **Department Transfer** - Pick whether the punch should be a department transfer or not.
   - **Delete** - Removes the punch from the Time Card.
   - **OK** - Saves the changes to the Time Card.

4. Click next to the Time field. Saving the Time Card is what triggers the processing calculation. This includes rounding punches, adding meal deductions, holiday hours generating, calculating overtime, and so on.

5. The Time Card has a few symbols that you might see next to punches or hours.
   - **Dot (•)** - the record has been manually edited.
   - **Double right arrows (>>)** - the punch was created on the next day and has been pulled back.
   - **Double left arrows (<<)** - the punch was created on the previous day but has been pushed forward to pair with another punch.

6. To add hours, click + Add, then + Hours. This will populate a new Hour, Earning, and Department field. Then type in the desired hours, select the earning code and department.

7. To add other pay, click + Add, then + Other Pay. This will populate a new field to enter in an amount and a dropdown box to select a code.

8. To see a quick view of all punches for a week, click on “View Punches by Day”.

9. To see a more detailed view of a day’s punches, click Daily Audit View. This will open the Time Card Daily Audit view, which will show Active and Deleted punches.

10. The "Hours Summary" section at the top of the Time Card doesn’t update until the Time Card saves. This is because processing needs to occur to make sure all earnings are accurate.
Note: A “Deduction” icon will appear if the employee is using a meal policy that is configured to deduct hours. The Supervisor can override the deduction by editing that column.
Perform Time Job Aid:
Dashboard and Time Card Functionality

Previous Version of Time Card

1. To add a punch, click + Add Punch. Type in a time in the In and Out fields.

2. Another option of editing punches is to click the clock icon next to each In and Out punch.
   - **Punch Time** - Can you the dropdown boxes to easily select a time to enter into the Time Card.
   - **Activity Type** - Pick what type of activity the punch should be.
   - **Status Type** - Pick whether the punch should be an In or Out punch.
   - **Department** - Pick a department for the punch.
   - **Department Transfer** - Pick whether the punch should be a department transfer or not.
   - **Delete** - Removes the punch from the Time Card.
   - **OK** - Saves the changes to the Time Card.

3. The Time Card has a few symbols that you might see next to punches or hours.
   - **Dot (•)** - The record has been manually edited.
   - **Double right arrows (>>)** - The punch was created on the next day and has been pulled back.
   - **Double left arrows (<<)** - The punch was created on the previous day but has been pushed forward to pair with another punch.

4. To add hours, click on the Add Hours button. This will populate a new Hour, Earning, and Department field. Then type in the desired hours, select the earning code and department.

5. To add other pay, click the Other Pay button. This will populate a new field to enter in an amount and a dropdown box to select a code.

6. To see a more detailed view of a day's punches, click the eye (👁️) icon. This will open the Time Card Daily Audit view, which will show Active and Deleted punches.

7. The "Hours Summary" section at the bottom of the Time Card doesn't update until the Time Card saves. This is because processing needs to occur to make sure all earnings are accurate.

8. After all edits have been made to the time card, click ✅ Save in the bottom right. Saving the Time Card is what triggers the processing calculation. This includes rounding punches, adding meal deductions, holiday hours generating, calculating overtime, and so on.

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**Note:** A "Deduction" column will appear if the employee is using a meal policy that is configured to deduct hours. The Supervisor can override the deduction by editing that column.
Time Card Exceptions.

A Time Card Exception policy must be created and assigned to an employee before any exceptions can show up.

Marking exceptions as “critical” in the exceptions policy will keep the Time Card form being approved if any of those exceptions remain on the Time Card. These exceptions will also keep the payroll manager from being able to send the time data to payroll.

Updated Version of Time Card

1. Go to the Time Card for an employee.
2. If there are Time Card exceptions, they will be listed on the day where the actual exception happened.

   Note: Depending on what type of exception has occurred, the message will give you a direction on how to solve the exception. If it is a critical exception, the bar will be colored red.

3. Once corrections have been made, click the Save button.
Previous Version of Time Card

1. Go to the Time Card for an employee.

2. If there are Time Card exceptions, they will be listed on the day where the actual exception happened.
   
   **Note:** Depending on what type of exception has occurred, the message will give you a direction on how to solve the exception.

3. Once corrections have been made, click the button.