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ATHENA TIME AND ATTENDANCE

Timesheet & Payroll Records Training Resource Guide

Timesheet & Payroll Records

Training Resource Guide

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PURPOSE OF THIS GUIDE

The Timesheet and Payroll Records Resource Guide will provide you with explanations of the basic tools within Athena, walk you through the procedure of approving employee timesheets and preparing a payroll record export within the software, as well as provide you with specific scenarios you may encounter as you begin to independently navigate the system within the User Stories section of this guide.

TIMESHEET AND PAYROLL RECORD INTRODUCTION

The workflow of approving employee timesheets and finalizing a pay period, takes place in two modules of Athena Time and Attendance: Timesheet Records and Payroll Records. The timesheet approver will start in the Timesheet Records module where they will bulk approve a group of employees' timesheets, before moving into the Payroll Record Module to create a payroll record to be exported to the external payroll software.

It is important to note that within this process, the timesheet approver will need to validate any noted errors within the Payroll Export. This validation process may require the user to work within other Time and Attendance Workflows. Please reference the linked Export Error Cheat Sheet to learn how to validate potential errors found within the Payroll Export.

NAVIGATING THE TIMESHEET RECORDS MODULE

View employee time records by punch in/out, daily job, daily time worked, time worked in pay period by job class, and time worked in pay period. Timesheet Records (T-Records) store an employee's punches.
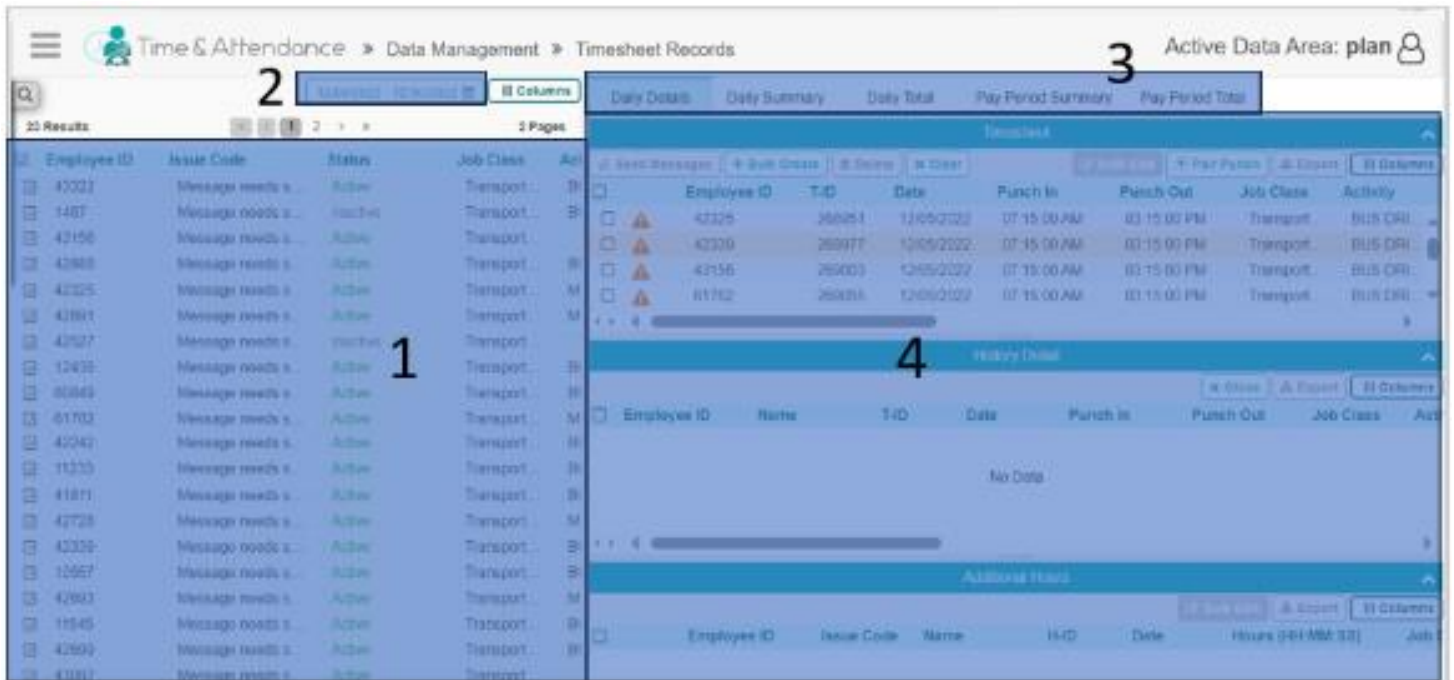
1. Enter the Time and Attendance Application.

2. Navigate to the Timesheet Records Module within the Data Management section of the menu.
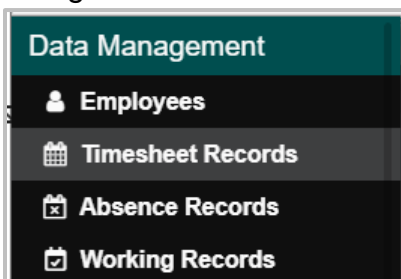
3. Timesheet Records—Module Interface:

1. <u>Employee List</u>: On the left in the Data Panel is the employee list.

2. <u>Date Range</u>: Above that and next to column is a date filter for search results.

3. <u>Timesheet Tabs</u>: There are five tabs that display different types of data related to T-Records.

4. <u>Workspace Panel Cards</u>: There are three cards in the Workspace Panel: Timesheet, History Detail, and Additional Hours.

4. Timesheet Tabs:

There are five tabs that display different types of data related to Timesheet Records (T-Records). Some of the tabs are "View only" meaning the user is able to view the information relevant to that tab and export that information—however the information in "View only" tabs are not editable.

Daily Details	Daily Summary	Daily Total	Pay Period Summary	Pay Period Total

Editable tabs house tools that allow the user to make changes to the data present in that tab. Reference the table below to learn more about the five tabs found within the Timesheet Records Workspace Panel.

Tab Type	Description
Daily Details (Editable Data)	See each individual punch an employee makes and any issue codes that go with them. Within this the user can access multiple workflows when editing Timesheet Records; please reference the **Daily Details Tab** for more information on the available tools.
Daily Summary (View only)	See what job and activity each employee performed, time worked, and total T-records.
Daily Total (View Only)	See how long an employee worked in a day, how many T-records and what pay period.
Pay Period Summary (View Only)	See how many hours worked for pay period, job and activity, how many T-records.
Pay Period Total (View Only)	See how much time an employee has worked in a pay period, and how many T-records.

5. Daily Details Tab

Within the Daily Details tab the user can make changes to an employee's timesheet in the form of the following workflows:

- Message employees
- Bulk create/approve additional records
- Insert T-Records above or below current punches
- Bulk Edit Timesheet
- Pair Punches

5.1 Message Employees to Correct T-Records:
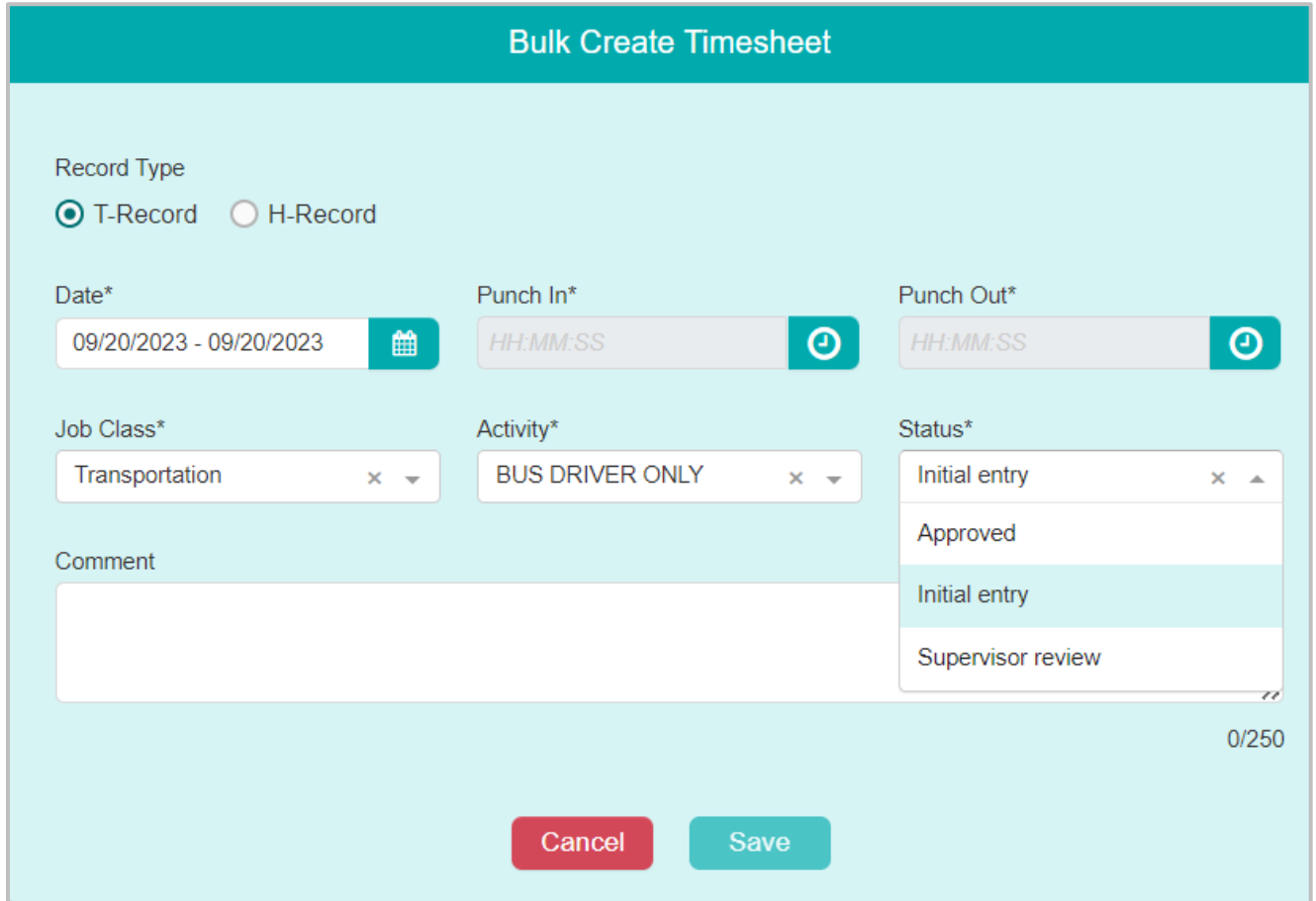
Send messages to employees concerning their Timesheet, asking the employee to do one of the following:

- Employee to approve
- Employee to correct
- Request info from employee

Reference the Bulk Create a New T-Record user story to learn more about the tool.

5.2 Bulk Create Additional T-Records:

The Bulk Create tool is used to create additional timesheets for multiple employees, or if only one employee is selected within the Data Panel, it can be used to create an additional T-Records for one employee at a time.

Reference the Bulk Create a New T-Record user story to learn more about the tool.

5.3 Insert T-Records Above or Below Current Punches:

By right clicking on a record, the user will see the option to either "Insert T-Record Above/Below" the selected record, and the user will be brought to the "Create Timesheet" window where they can create a single T-Record.

5.4 Bulk Edit Timesheet:

The Bulk Edit tool can be used to edit fields within a T-Record, or can be used by Timesheet approvers to "Approve" T-Records prior to exporting a Payroll Record.

As with the Bulk Create tool, the user is able to perform this action in bulk for multiple employees at a time, or if only one employee is selected within the Data Panel, can be used to adjust a single employees T-Record at a time.

Reference the Approve Employee Group Timesheet user story to learn more about how this tool is used in your day-to-day workflows.

5.5 Pair Punches:

The Pair Punches tool is used to match in and out punches in cases of tablets not synching, as well as inconsistency of punch locations to create a complete T-Record for a recorded working day.

Reference the Pair Punch Tool to Complete T-Record User Story to learn more about how this feature is employed in your day-to-day workflows.
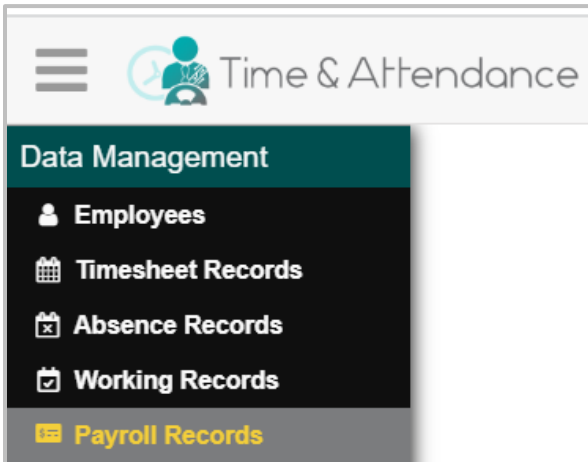
NAVIGATING THE PAYROLL RECORDS MODULE

Payroll records (P-Records) store the approved T-Records and Absence Records (A-Records) so they can be exported to a district's external payroll software.

1. Enter the Time and Attendance Application.

2. Navigate to the Payroll Records Module within the Data Management section of the menu.

3. **Search Bar:**
   Using the search bar and additional filters, query for the employee group you will be building the Payroll Record for.
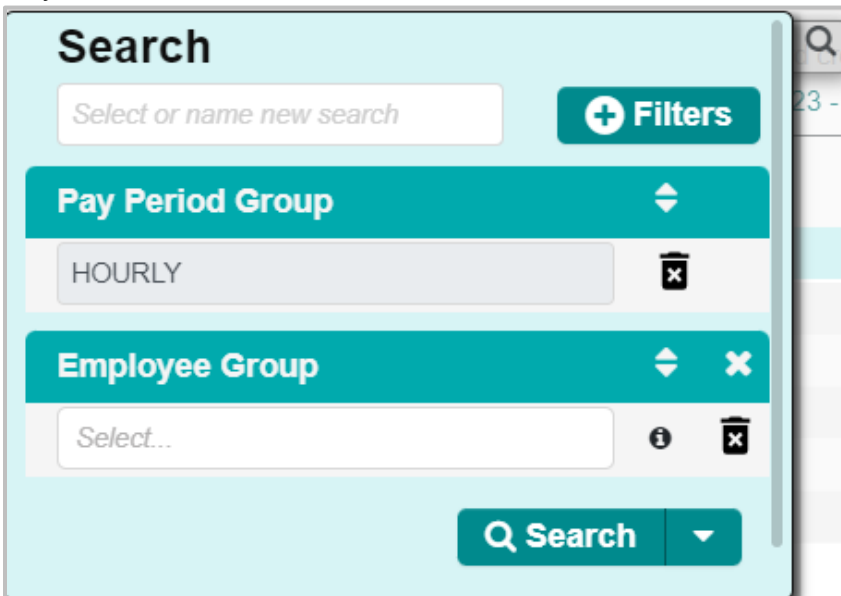
4. Payroll Records—Module Interface:

1. Employee List: Employees are listed in the Data Panel based on the search criteria entered.

2. P-Records by Payroll Period or Record Creation: Filter by Payroll Dates (pay periods) or by their creation date (when the payroll record was created).

3. Create: Create a Payroll Record to complete the Payroll Export to the external payroll software.

4. Four Tabs: Daily Payroll, Weekly Payroll, Pay Period Payroll, and Payroll Export.

5. Cards in Workspace Panel: Payroll, Payroll Detail, and History Detail.

5. Create a Payroll Record:
To create a Payroll Record (P-Record), select a group of employees and navigate to the "Create" button within the Data Panel. In the "Create Payroll Period" window, identify whether a Daily, Weekly, or Pay Period P-Record is being created.

When creating a Payroll Record the user should keep the following in mind:
- Make sure only the worked days are selected within the "Selected Date Range" pop-out (Leave Sunday unchecked).
- Verify the status is correct.

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Create Payroll Record

Record Type

○ Daily   ○ Weekly   ● Pay Period

Date

| 09/04/2023 - 09/29/2023 | 📅 |

Status

| Employee to approve | × ▾ |

Comment

| |
| |

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Cancel   Save

ATHENA TIME AND ATTENDANCE USER STORIES

The User Stories section of this guide will offer you scenarios that are applicable to some of the workflows you might encounter in your day-to-day tasks within Athena. Some scenarios that will be discussed include:

Timesheet Record User Stories:

> ➢ Approve Employee Group Timesheet
> ➢ Bulk Create a New T-Record
> ➢ Pair Punch Tool to Complete T-Record

Payroll Record User Stories:

> ➢ Create a Payroll Record

Approve Employee Group Timesheet

Before the AP can create a Payroll Record, they first need to approve employee timesheets within the Timesheet Records module.

Here's How:

1. Enter the Time and Attendance Application.

2. Workflow within Timesheet Records:
Navigate to the Timesheet Records Module.
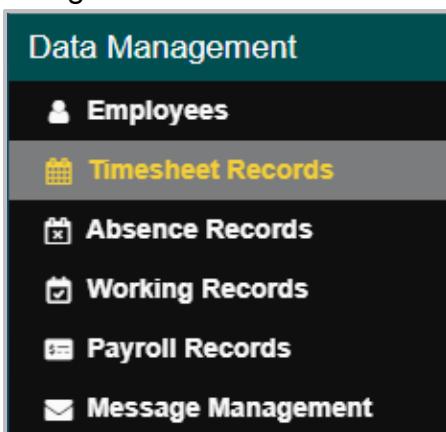
3. Search by Employee Group.

4. The results of your search will populate in the Data Panel.

4.1 To see all the employees within the queried group, the user will first need to change the pay period range—the default range will be the 'today'. Select the Pay Period Range within the Data Panel.

Be sure to select the Pay Period tab within the pop-out window to locate the pay period of choice.

➢ You may need to minimize your screen to see the Apply button at the bottom of the window.

Selecting Apply will display the new pay period, and populate the employees within the Data Panel.

5. Selecting all employees listed in the Data Panel, will populate their corresponding timesheets in the "Timesheets" card within the Workspace Panel.
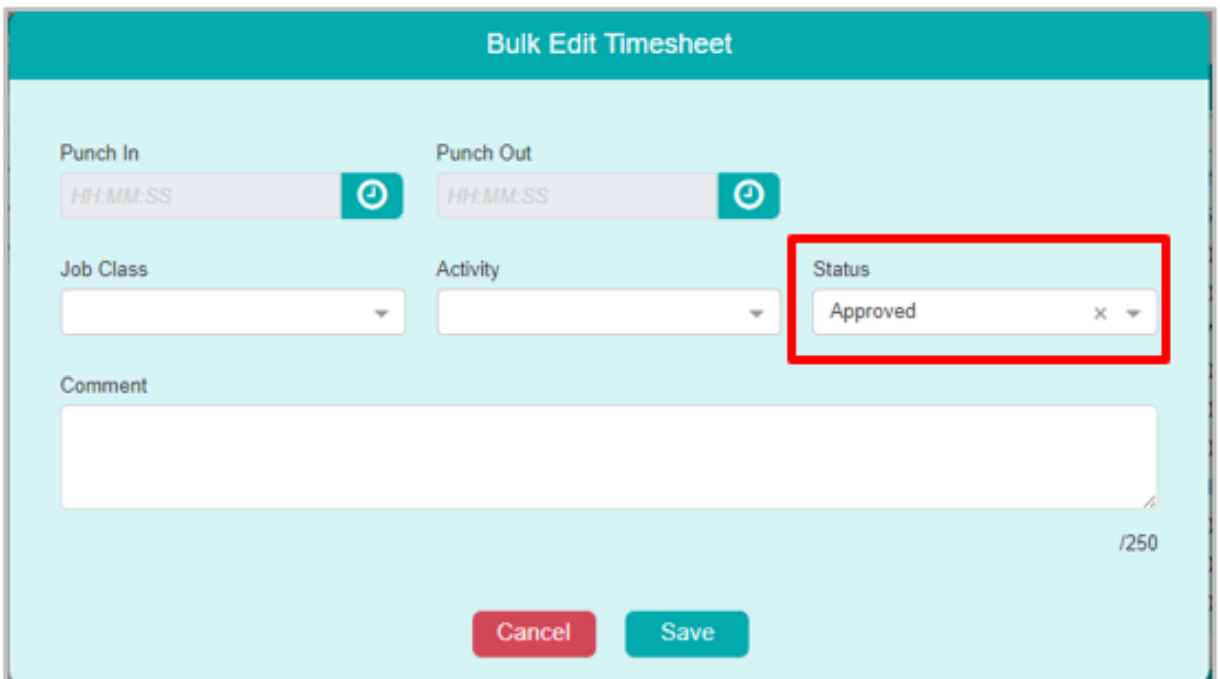
5.1 Bulk Approve Timesheets:

Select all records within the Timesheet card, before selecting the Bulk Edit tool at the top of the card which will populate the Bulk Edit Timesheet window.

Within the Bulk Edit Timesheet window navigate to Status and select Approved—**you do not need to fill out the other fields within this window to approve the timesheets**—select Save.

The user will see the Status column update in the Timesheet card to reflect the approved status.

5.2 Before approving timesheets, it is recommended the user verify the employees have logged the correct Activity Code for their Job Class.

- For example, below the user has noted the Activity should be "01-Bus" and not "02-Bus Sub".

The user can select the records that need to be adjusted, and navigate back into the "Bulk Edit" tool to change the Activity to the correct "01-Bus". Selecting Save will update the Activity within the Timesheet card for all selected records.
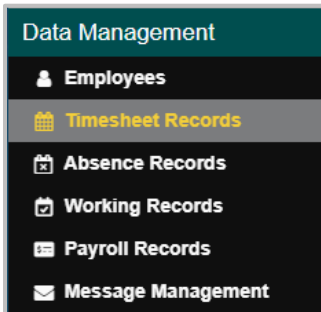
Bulk Create a New T-Record

The punch system was down for maintenance on 12/06/2022, and employees were unable to punch in/out as usual. You would like to create a T-Record for all employees for the identified day—you will use the Bulk Create tool to create an Initial Entry.

Here's How:

1. **Workflow within Timesheet Records:**
    Navigate to the Timesheet Records Module.

2. Select the appropriate Pay Period within the Data Panel, and select the Pay Period tab within the pop-out window to locate the pay period of choice.
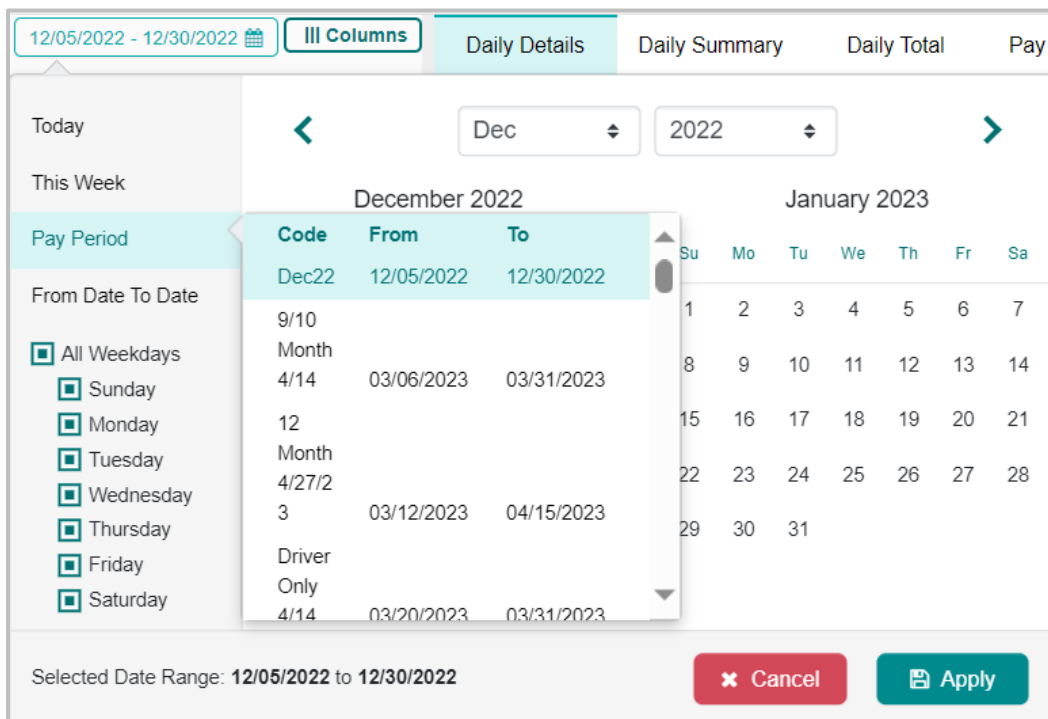
    Selecting Apply will display the new pay period, and populate the employees within the Data Panel.

3. Selecting all employees listed in the Data Panel, will populate their corresponding timesheets in the "Timesheets" card within the Workspace Panel.

4. Within the Timesheet card the user can see the lack of T-Records for 12/06/2022.

Select the Bulk Create tool at the top of the Timesheet card, and the user will be brought to the Bulk Create Timesheet window where they will do the following.

- "From Date to Date" range = 12/06/2022-12/06/2022
- Punch in/out time
- Job Class = Transportation
- Activity = Bus Driver
- Status = Initial Entry

Once created the user will see a confirmation message pop-up in the upper right hand of their screen.

Create Record
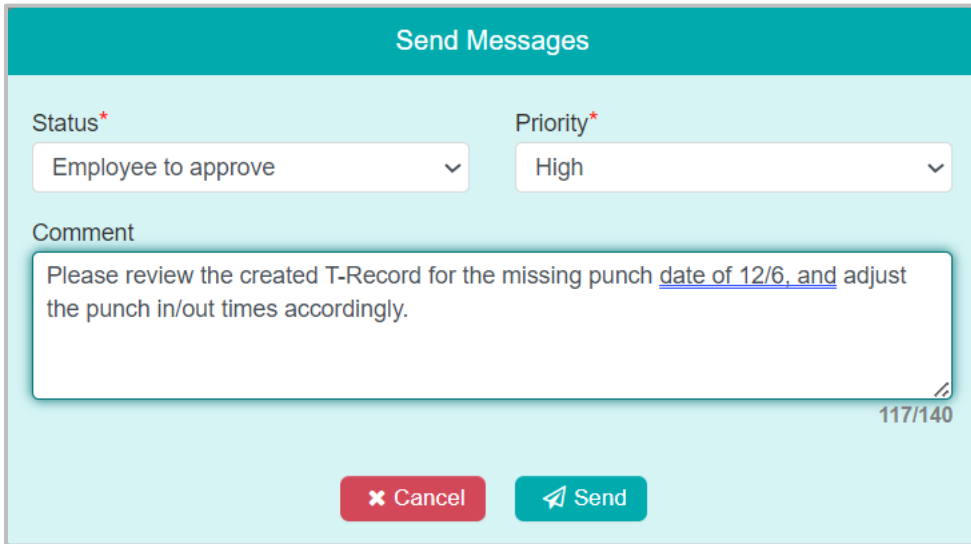✔ All records have been created successfully
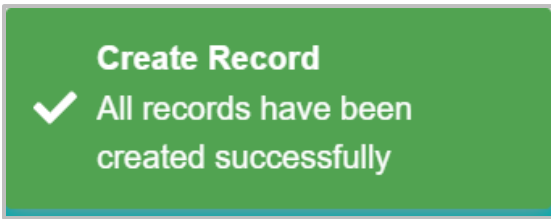
5. **Send Message to Employees:**
Once created, the user will select all the 12/06/2022 entries within the Timesheet card, and select the Send Message tool.

Daily Details	Daily Summary	Daily Total	Pay Period Summary	Pay Period Total

Timesheet ⌃

🖅 Send Messages	✚ Bulk Create	🗑 Delete	✖ Clear				☑ Bulk Edit	🖮 Pair Punch	⬆ Export	‖ Columns

⊟		Employee ID	Issue Code	T-ID	Date	Punch In	Punch Out	Status	Job Class	A
☐	⚠	▓▓▓		269549	12/06/2022	07:15:00 AM	03:15:00 PM	Approved	Transport...	
☑	⚠	▓▓▓		269557	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269558	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269559	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269560	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269561	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269562	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269563	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269564	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269565	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269566	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269567	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269568	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269569	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269570	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269571	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269572	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269573	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269574	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269575	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☑	⚠	▓▓▓		269577	12/06/2022	07:15:00 AM	03:15:00 PM	Initial entry	Transport...	
☐	⚠	▓▓▓		268953	12/07/2022	07:15:00 AM	03:15:00 PM	Approved	Transport...	
☐	⚠	▓▓▓		268979	12/07/2022	07:15:00 AM	03:15:00 PM	Approved	Transport...	

Craft a message to your staff to review the drafted punch for 12/06/2022, to encourage them to adjust the activity and punch in/out times as needed.

Send Messages

Status*
Employee to approve

Priority*
High

Comment
Please review the created T-Record for the missing punch date of 12/6, and adjust the punch in/out times accordingly.

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✖ Cancel   ✈ Send

Pair Punch Tool to Complete T-Record

One of your bus monitors punched in on Bus A, but punched out on Bus B following the completion of their PM Route. You have verified their punch times and location. You would like to merge the two punches into a single T-Record and approve their time using the "Pair Punch" tool within the Timesheet Records Module.

Here's How:

1. Enter the Time and Attendance Application.

Time & Attendance

2. Workflow within Timesheet Records:
Navigate to the Timesheet Records Module.

Data Management
👤 Employees
📅 Timesheet Records
🗓 Absence Records
🗓 Working Records
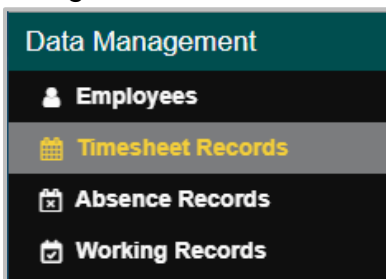
3. **Search Bar:**

Search for the missing records using the following filters:

- Employee ID
- Miss Punch = One Punch

4. **Select Date Range:**

To see the queried employee within the Data Panel, you will first need to change the pay period range—the default range will be the 'today'. Select the Pay Period Range within the Data Panel.

Within the drop-down window, navigate to the "Pay Period" tab, and select the pay period that the employee reported the inconsistency of their punch locations.

Select the employee within the Data Panel.

5. **Pair Punches:**

Within the Timesheet card select the "Pair Punch" tool.

The user will be brought to the Pair Punches window where they will see any potential pairings identified within the Missing Punch Records table—these suggested pairings will be identified by green check-marks within the "In Suggested" column of the upper table.

The user will select the suggested T-Record pairing for the identified employee within the Suggested Pairing Records table, and change the status to "Approved" before selecting "Pair".

5.1 Common Errors within Pair Punches Window:

Some common errors a user may see when attempting to confirm paired punches are the following:

- **This payroll period has been locked** = The Payroll Records has already been finalized and is therefore locked to further edits.

- **Time overlap** = The system is unable to pair punches when the selected date contains punches with overlapping times.

6. Completed T-Record:

When the record is successfully paired, the user will see a confirmation message populate in the upper right hand of their screen, and see the newly completed T-Record populate at the bottom of the Timesheet card.
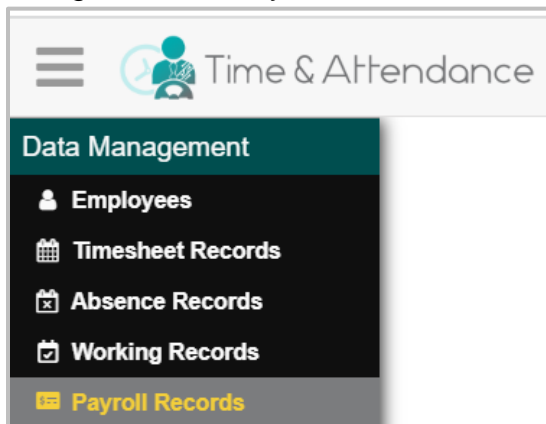

Create a Payroll Record

Following the approval of the employee timesheets, the AP will navigate into the Payroll Records Module to create a P-Record for the appropriate employee group, review and validate any errors within the export, before finalizing the export to share with the external payroll software.
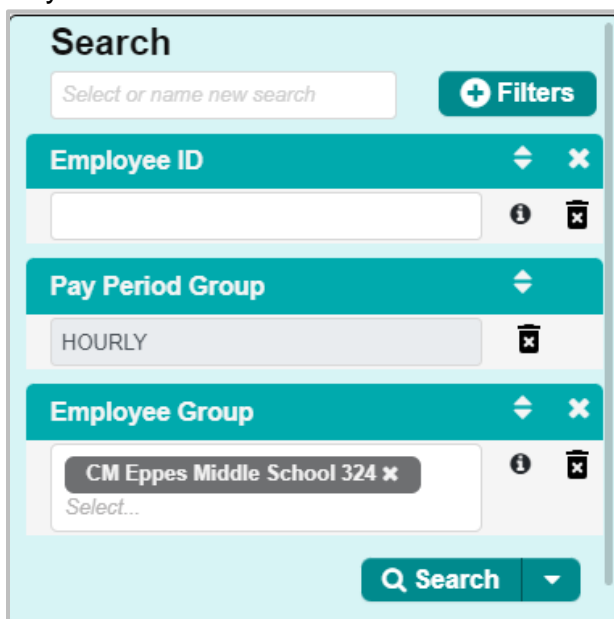
Here's How:

1. **Workflow within Payroll Records:**
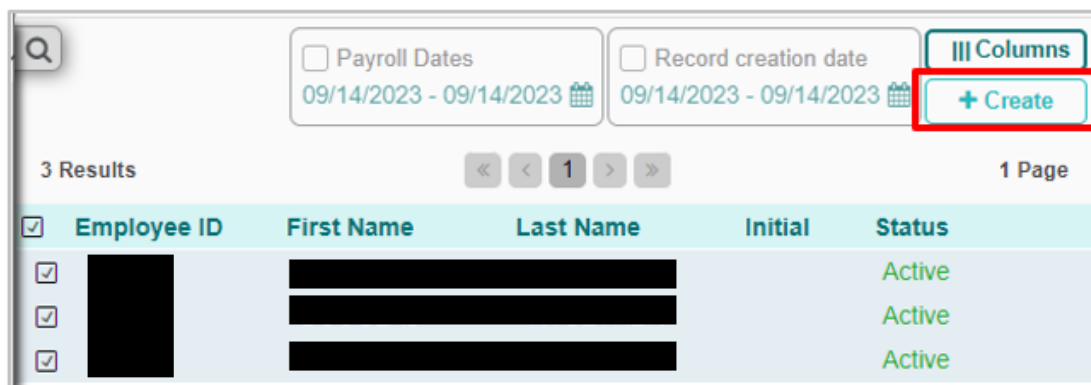   Navigate to the Payroll Records Module within the Data Management section of the menu.

2. **Search Bar:**
   Using the search bar and additional filters, query for the employee group you will be building the Payroll Record for.
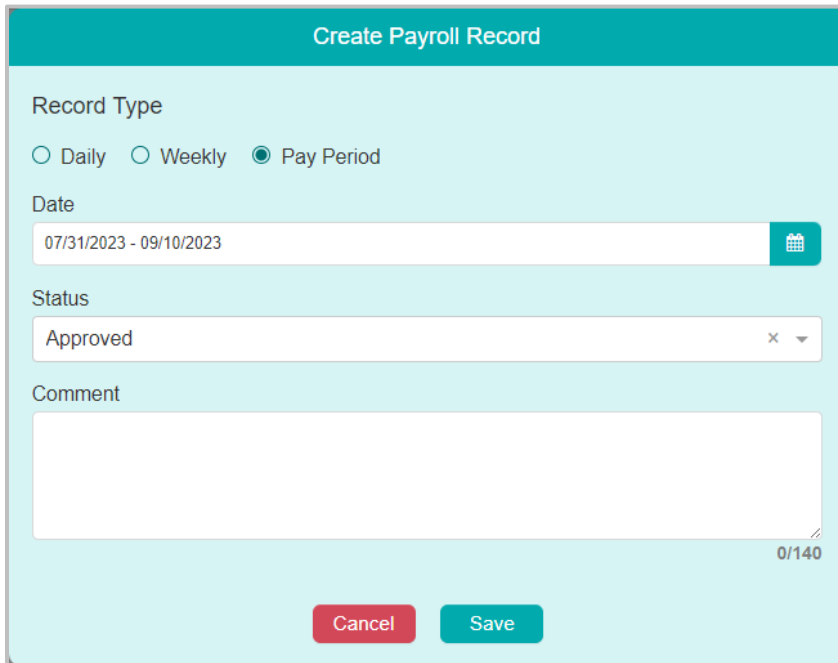

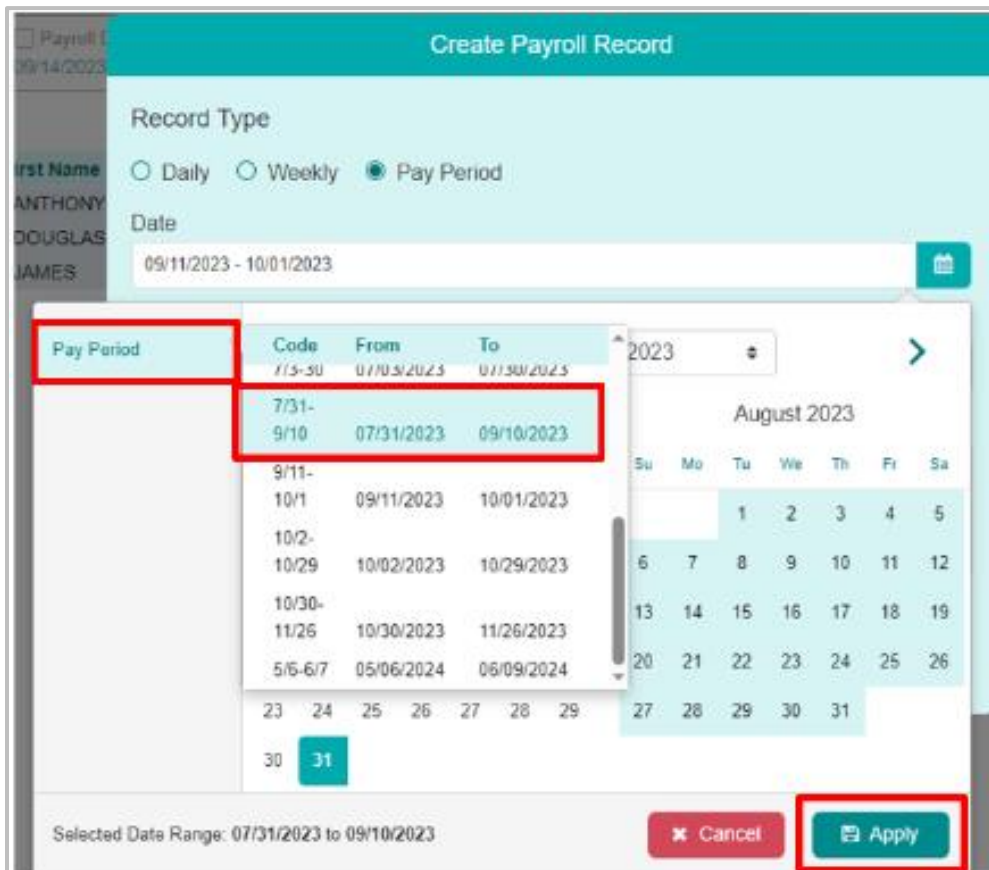3. Select all employees within the Data Panel, before selecting Create.

3.1 Create Payroll Record:

Within the "Create Payroll Record" window the user will do the following:

- Record Type = Pay Period
- Status = Approved
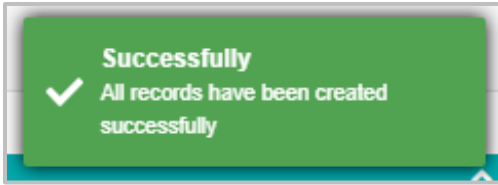- Select calendar icon in the Date field to select the correct pay period.
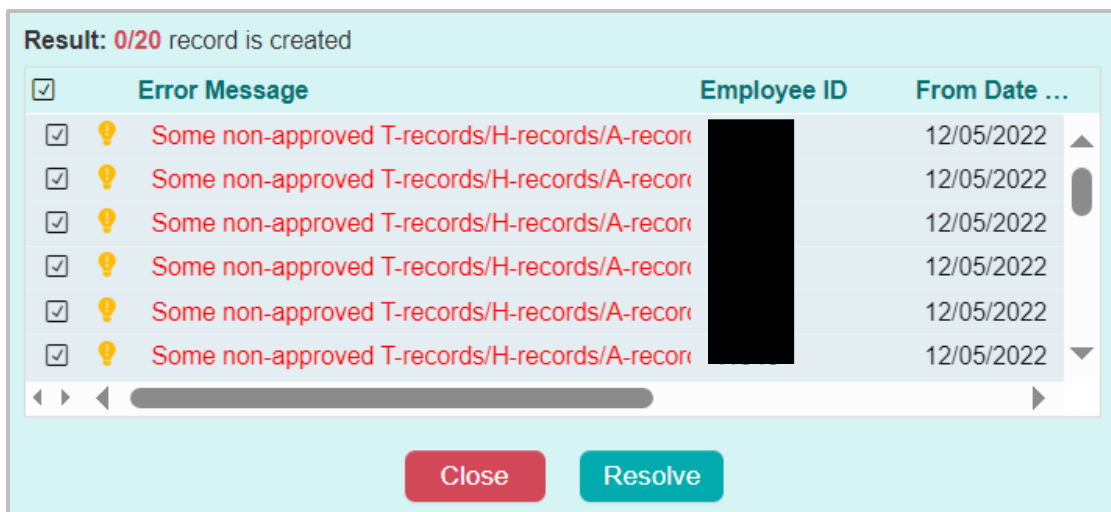

Selecting Pay Period:

Selecting Save the user will see a message populate in the upper right hand of their screen letting them know they successfully created the pay period records.
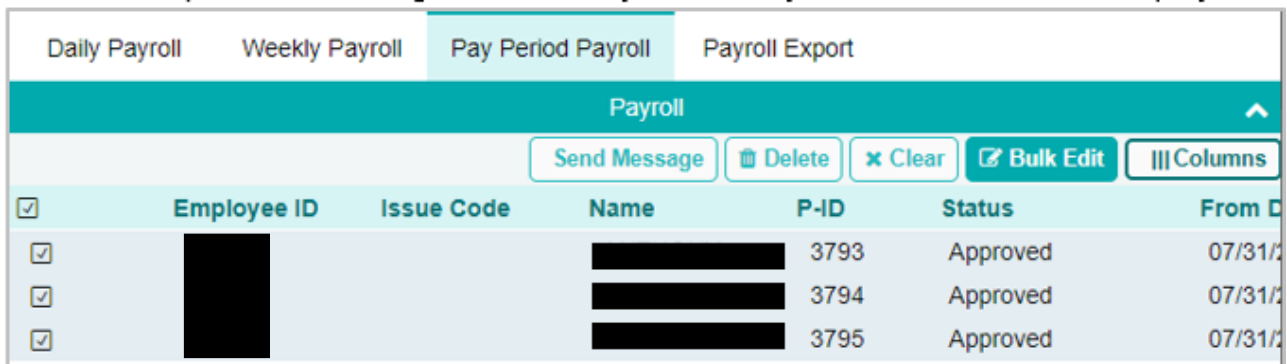

3.2 Common Error Message When Creating a Payroll Record:

A common error a user may encounter when creating a payroll record is the following: "Some non-approved T-Records/H-Records/A-Records". The user can select all, and resolve the errors in the Create Payroll Record Window.

4. In the Workspace Panel navigate to the "Pay Period Payroll" tab and select all employees.

Once selected, navigate to the "Payroll Export" Tab, select all employees in the 'Payroll' card and the user will see the "Payroll Export Record" update with the records that were "Successful" and the records that were flagged as "Errors".

The records flagged within the Error tab will need to be corrected before the payroll can be exported. **Do not select "Finalize"—this will finalize all of payroll and lock everyone out.**

5. **Resetting Payroll:**
   To make corrections to employee records following the creation of a Pay Period Payroll, you will need to first unlock the Pay Period. Navigate back to the "Pay Period Payroll" tab, and highlight all employees.

Once employees are highlighted, select the Delete tool. This will retain their timesheets, however will unlock the Payroll once again, so the user can begin addressing the errors found within the Payroll Export.