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ATHENA TIME AND ATTENDANCE

Timesheet & Payroll Records Training
Resource Guide



Timesheet & Payroll Records

Training Resource Guide

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TIMESHEET & PAYROLL RECORDS TRAINING RESOURCE GUIDE

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.

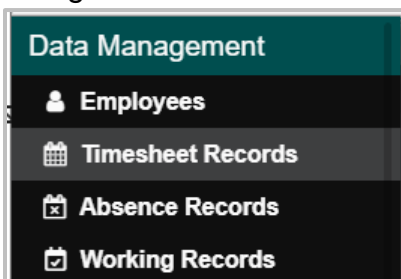
NAVIGATING THE TIMESHEET RECORDS MODULE

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.

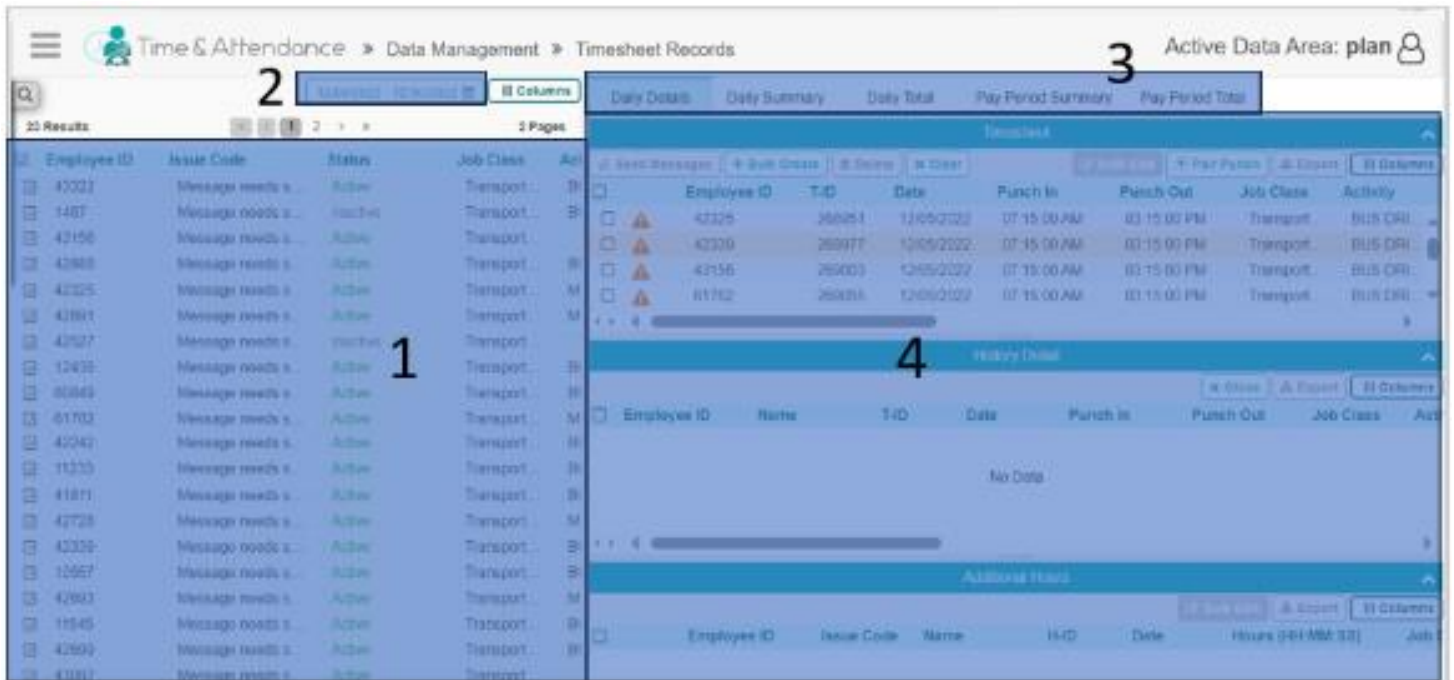
1. Enter the Time and Attendance Application.



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



3. Timesheet Records—Module Interface:



1. Employee List: On the left in the Data Panel is the employee list.
2. Date Range: Above that and next to column is a date filter for search results.
3. Timesheet Tabs: There are five tabs that display different types of data related to T-Records.
4. Workspace Panel Cards: 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.



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:

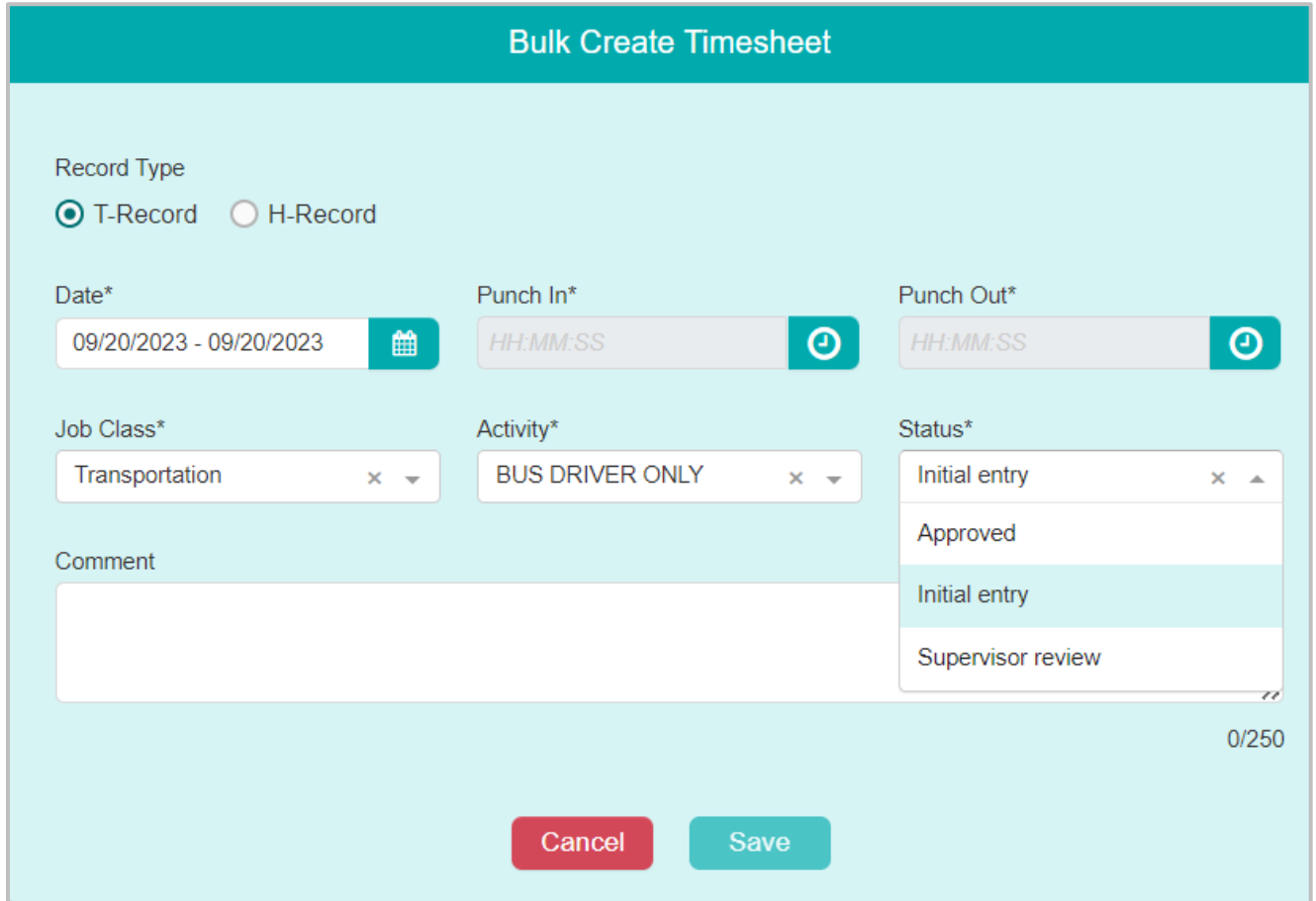
Send messages to employees concerning their Timesheet, asking the employee to do one of the following:

- 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.

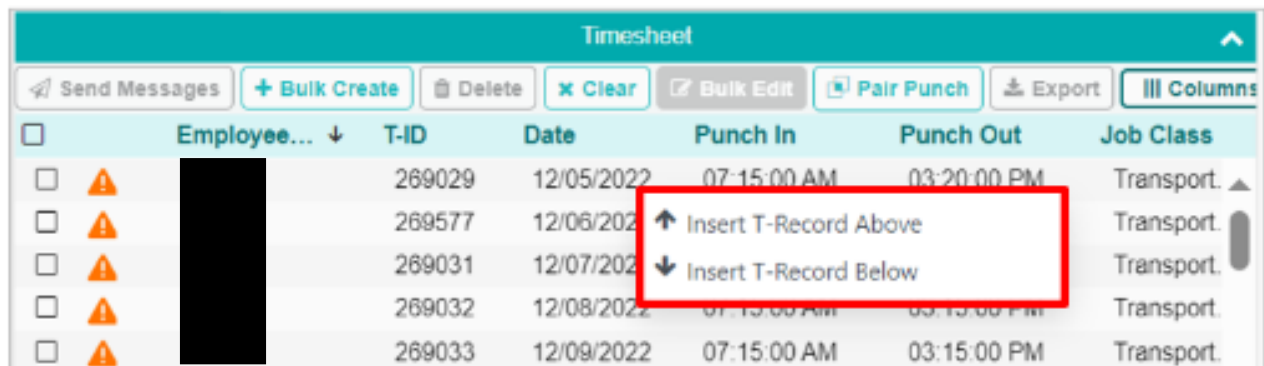


The screenshot shows the 'Bulk Create Timesheet' form. At the top, there is a teal header with the title 'Bulk Create Timesheet'. Below the header, the form is organized into several sections. The first section is 'Record Type', with radio buttons for 'T-Record' (selected) and 'H-Record'. The second section contains three input fields: 'Date*' with a date range '09/20/2023 - 09/20/2023' and a calendar icon; 'Punch In*' with a time format 'HH:MM:SS' and a clock icon; and 'Punch Out*' with a time format 'HH:MM:SS' and a clock icon. The third section contains three dropdown menus: 'Job Class*' with 'Transportation' selected, 'Activity*' with 'BUS DRIVER ONLY' selected, and 'Status*' with 'Initial entry' selected. Below these is a 'Comment' text area. At the bottom right, there is a character count '0/250'. At the very bottom, there are two buttons: 'Cancel' (red) and 'Save' (teal).

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.



The screenshot shows a table titled 'Timesheet' with a toolbar at the top containing buttons for 'Send Messages', 'Bulk Create', 'Delete', 'Clear', 'Bulk Edit', 'Pair Punch', 'Export', and 'Columns'. The table has columns for 'Employee...', 'T-ID', 'Date', 'Punch In', 'Punch Out', and 'Job Class'. A context menu is open over the second row, showing options 'Insert T-Record Above' and 'Insert T-Record Below', which are highlighted with a red box.

Employee...	T-ID	Date	Punch In	Punch Out	Job Class
[Redacted]	269029	12/05/2022	07:15:00 AM	03:20:00 PM	Transport.
[Redacted]	269577	12/06/2022	[Redacted]	[Redacted]	Transport.
[Redacted]	269031	12/07/2022	[Redacted]	[Redacted]	Transport.
[Redacted]	269032	12/08/2022	[Redacted]	[Redacted]	Transport.
[Redacted]	269033	12/09/2022	07:15:00 AM	03:15:00 PM	Transport.

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 syncing, as well as inconsistency of punch locations to create a complete T-Record for a recorded working day.

The screenshot displays the 'Pairing Punches' interface. At the top, there is a date range selector set to '03/05/2023 - 03/31/2023'. Below this, the 'Missing Punch Records' section contains a table with columns: In Suggested, Employee ID, Date, Punch In, Punch Out, Job Class, Activity, and Vehicle ID. Two rows are highlighted with a red border, showing punch records for 03/06/2023. The first row has a green checkmark in the 'In Suggested' column and shows a punch in at 05:16:34 AM and a punch out at 08:35:18 AM. The second row shows a punch in at 12:35:40 PM and a punch out at 01:56:12 PM. Below this, the 'Suggested Pairing Records' section contains a table with columns: Employee ID, Date, Origin Punch In, Origin Punch Out, Status, Job Class, Activity, and Veh. One row is highlighted with a red border, showing a suggested pairing for 03/06/2023 with an origin punch in at 05:16:34 AM and an origin punch out at 08:35:18 AM, with a status of 'Approved'. At the bottom, there is a 'Status' dropdown menu with options: Approved, Initial entry, and Supervisor review. There are also 'Cancel' and 'Pair' buttons.

In Suggested	Employee ID	Date	Punch In	Punch Out	Job Class	Activity	Vehicle ID
✓	[REDACTED]	03/06/2023	05:16:34 AM		Transport...	BUS DRIVER ...	741
✓	[REDACTED]	03/06/2023		08:35:18 AM	Transport...	BUS DRIVER ...	741
	[REDACTED]	03/10/2023	12:35:40 PM		Transport...	BUS DRIVER ...	741
	[REDACTED]	03/06/2023		01:56:12 PM	Transport...	BUS DRIVER ...	695

Employee ID	Date	Origin Punch In	Origin Punch Out	Status	Job Class	Activity	Veh
[REDACTED]	03/09/2023	06:12:14 AM	09:07:19 AM	Approved	Transport...	BUS DRI...	
[REDACTED]	03/07/2023	04:59:44 AM	01:35:39 PM	Approved	Transport...	BUS DRI...	
[REDACTED]	03/06/2023	05:16:34 AM	08:35:18 AM	Approved	Transport...	BUS DRI...	
[REDACTED]	03/16/2023	01:43:41 PM	01:43:44 PM	Approved	Transport...	BUS DRI...	

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.

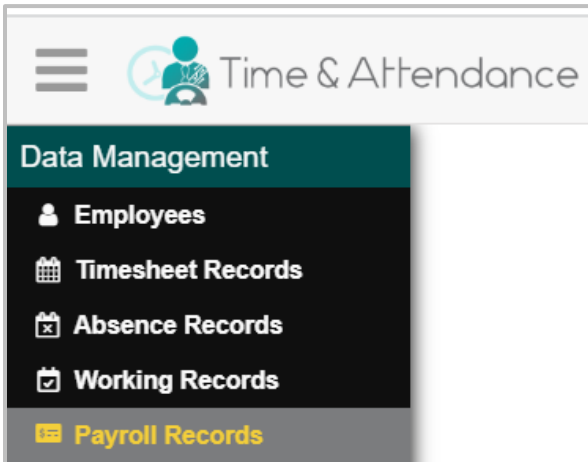
NAVIGATING THE PAYROLL RECORDS MODULE

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.

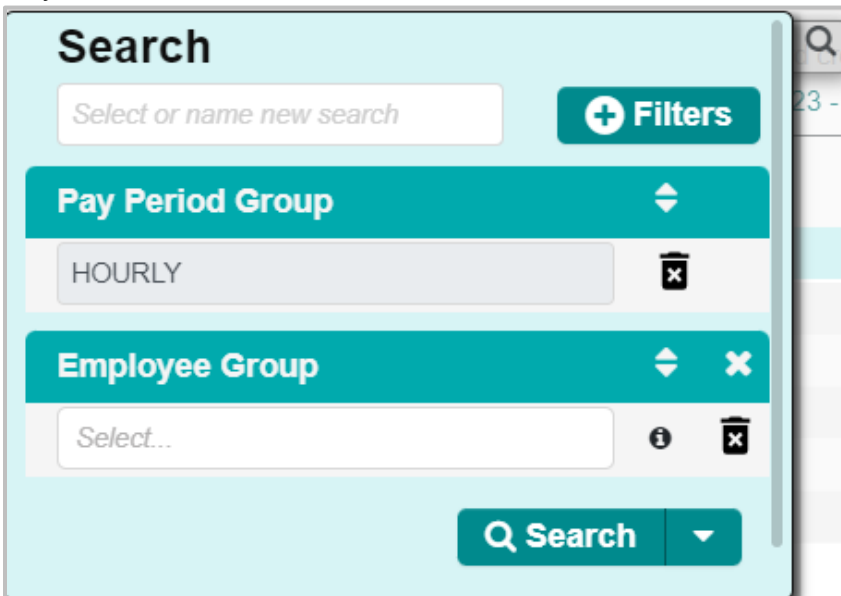


2. Navigate to the Payroll Records Module within the Data Management section of the menu.



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:

The screenshot displays the 'Time & Attendance' module interface, specifically the 'Data Management > Payroll Records' section. The interface is divided into several panels:

- Search Panel:** Contains a search bar (2) and a 'Create' button (3).
- Employee List:** A table (1) listing employees with columns for Employee ID, Status, Job Class, and Activity.
- Filter Panel:** Includes tabs for 'Daily Payroll', 'Weekly Payroll', 'Pay Period Payroll', and 'Payroll Export' (4).
- Payroll Records Table:** A table showing payroll records with columns for Employee ID, P-ID, Status, From Date, To Date, and Created/Updated Time.
- Payroll Transaction Detail Table:** A table (5) showing transaction details with columns for Employee ID, Date, Job Class, Activity, Duration (HH:MM:SS), and Pay Period.
- Payroll Hours & Detail Table:** A table showing hours per day with columns for Employee ID, Name, Date, Hours Per Day, Description, and Hours.
- History Detail Table:** A table showing history details with columns for Employee ID, Name, P-ID, Status, From Date of Re, To Date of Report, and Created/Updated Time.

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.

Create Payroll Record

Record Type

Daily Weekly Pay Period

Date

09/04/2023 - 09/29/2023



Status

Employee to approve



Comment

0/140

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.

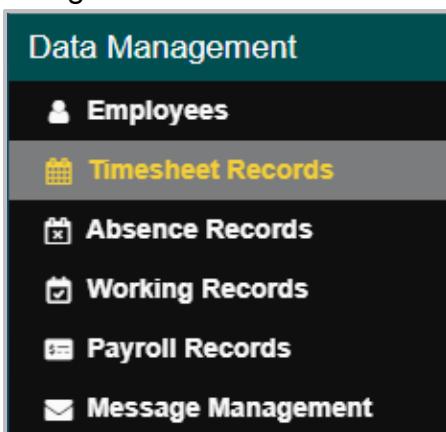
Here's How:

1. Enter the Time and Attendance Application.



2. **Workflow within Timesheet Records:**

Navigate to the Timesheet Records Module.



3. Search by Employee Group.

Search

Select or name new search + Filters

Employee ID ↕ ✕

Employee Group ↕ ✕

CM Eppes Middle School 324 ✕ i ✕

Select...

Q Search ▾

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

09/14/2023 - 09/14/2023 Columns

1 Result 1 Page

<input type="checkbox"/>	Employee ID	Issue Code	First Name	Last Name
<input type="checkbox"/>	██████		██████████	██████████

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.

09/14/2023 - 09/14/2023 Columns

1 Result 1 Page

<input type="checkbox"/>	Employee ID	Issue Code	First Name	Last Name
<input type="checkbox"/>	██████		██████████	██████████

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.

Today

This Week

Jul 2023

August 2023

Pay Period

Code	From	To
7/31-9/10	07/31/2023	09/10/2023
9/11-10/1	09/11/2023	10/01/2023
10/2-10/29	10/02/2023	10/29/2023
10/30-11/26	10/30/2023	11/26/2023
5/6-6/7	05/06/2024	06/09/2024

From Date To Date

All Weekdays

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Selected Date Range: 07/31/2023 to 09/10/2023

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

07/31/2023 - 09/10/2023

Columns

3 Results

1 Page

Employee ID	Issue Code	First Name	Last Name
[Redacted]	Multi	[Redacted]	[Redacted]
[Redacted]	Multi	[Redacted]	[Redacted]
[Redacted]	Multi	[Redacted]	[Redacted]

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

07/31/2023 - 09/10/2023

Columns

3 Results

1 Page

Employee ID	Issue Code	Job Class	Work Sch
[Redacted]	Multi	BUSSUB	Flex
[Redacted]	Multi	BUSSUB	Flex
[Redacted]	Multi	BUSSUB	Flex

Daily Details | Daily Summary | Daily Total | Pay Period Summary | Pay Period 1

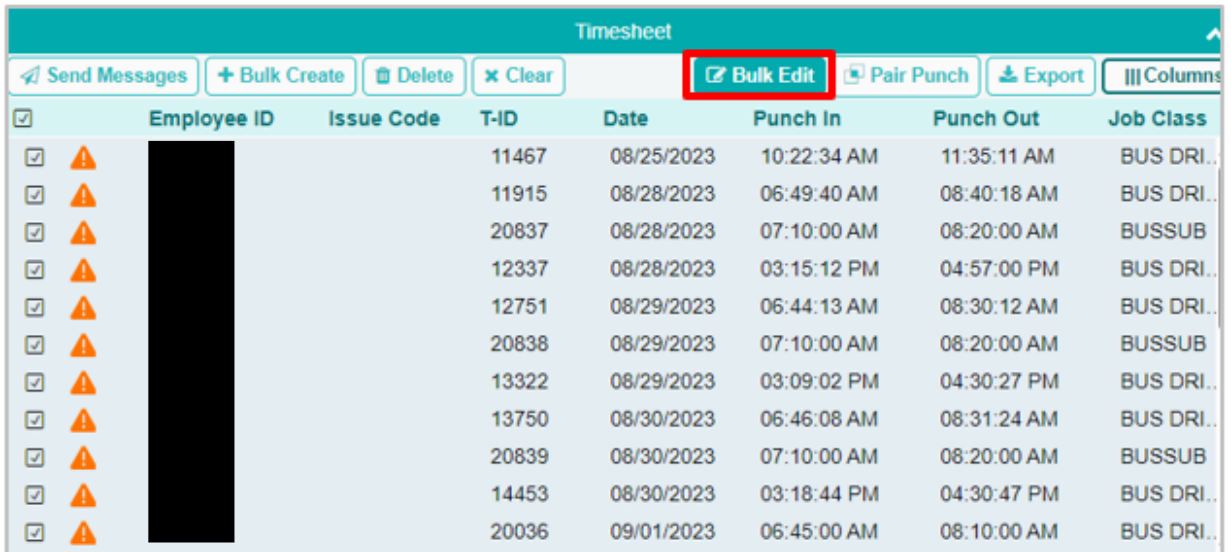
Timesheet

+ Bulk Create | Delete | Clear | Bulk Edit | Pair Punch | Export | Columns

Employee ID	Issue Code	T-ID	Date	Punch In
[Redacted]		11467	08/25/2023	10:22:34 AM
[Redacted]		11915	08/28/2023	06:49:40 AM
[Redacted]		20837	08/28/2023	07:10:00 AM
[Redacted]		12337	08/28/2023	03:15:12 PM
[Redacted]		12751	08/29/2023	06:44:13 AM
[Redacted]		20838	08/29/2023	07:10:00 AM
[Redacted]		13322	08/29/2023	03:09:02 PM
[Redacted]		13750	08/30/2023	06:46:08 AM
[Redacted]		20839	08/30/2023	07:10:00 AM
[Redacted]		14453	08/30/2023	03:18:44 PM
[Redacted]		20036	09/01/2023	06:45:00 AM

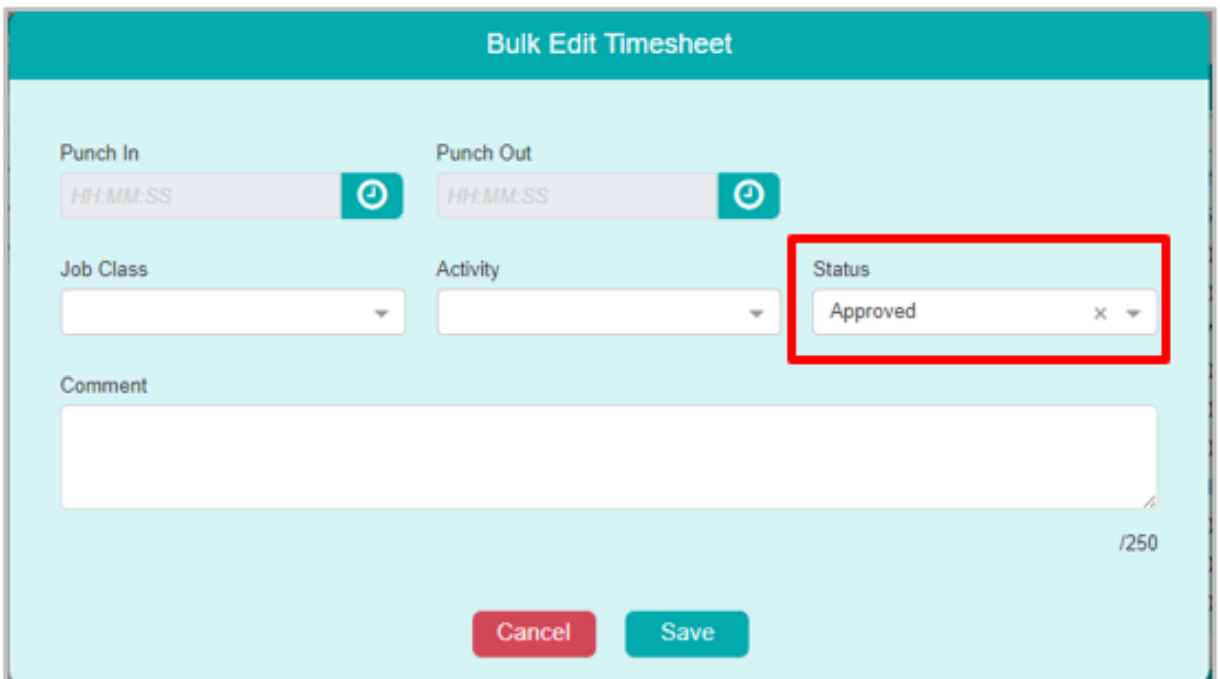
5.1 Bulk Approve Timesheets:

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.



Timesheet							
Send Messages + Bulk Create Delete x Clear Bulk Edit Pair Punch Export Columns							
<input checked="" type="checkbox"/>	Employee ID	Issue Code	T-ID	Date	Punch In	Punch Out	Job Class
<input checked="" type="checkbox"/>			11467	08/25/2023	10:22:34 AM	11:35:11 AM	BUS DRI..
<input checked="" type="checkbox"/>			11915	08/28/2023	06:49:40 AM	08:40:18 AM	BUS DRI..
<input checked="" type="checkbox"/>			20837	08/28/2023	07:10:00 AM	08:20:00 AM	BUSSUB
<input checked="" type="checkbox"/>			12337	08/28/2023	03:15:12 PM	04:57:00 PM	BUS DRI..
<input checked="" type="checkbox"/>			12751	08/29/2023	06:44:13 AM	08:30:12 AM	BUS DRI..
<input checked="" type="checkbox"/>			20838	08/29/2023	07:10:00 AM	08:20:00 AM	BUSSUB
<input checked="" type="checkbox"/>			13322	08/29/2023	03:09:02 PM	04:30:27 PM	BUS DRI..
<input checked="" type="checkbox"/>			13750	08/30/2023	06:46:08 AM	08:31:24 AM	BUS DRI..
<input checked="" type="checkbox"/>			20839	08/30/2023	07:10:00 AM	08:20:00 AM	BUSSUB
<input checked="" type="checkbox"/>			14453	08/30/2023	03:18:44 PM	04:30:47 PM	BUS DRI..
<input checked="" type="checkbox"/>			20036	09/01/2023	06:45:00 AM	08:10:00 AM	BUS DRI..

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.



Bulk Edit Timesheet

Punch In: HH:MM:SS [Clock icon]

Punch Out: HH:MM:SS [Clock icon]

Job Class: [Dropdown]

Activity: [Dropdown]

Status: **Approved** [Close icon]

Comment: [Text area]

Cancel Save

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

Timesheet								
Send Messages		+ Bulk Create	Delete	✕ Clear	✓ Bulk Edit	Pair Punch	Export	Columns
<input checked="" type="checkbox"/>	Employee ID	Status	T-ID	Date	Punch In	Punch Out	Job Cl	
<input checked="" type="checkbox"/>		Approved	11467	08/25/2023	10:22:34 AM	11:35:11 AM	BUS	
<input checked="" type="checkbox"/>		Approved	11915	08/28/2023	06:49:40 AM	08:40:18 AM	BUS	
<input checked="" type="checkbox"/>		Approved	20837	08/28/2023	07:10:00 AM	08:20:00 AM	BUS	
<input checked="" type="checkbox"/>		Approved	12337	08/28/2023	03:15:12 PM	04:57:00 PM	BUS	
<input checked="" type="checkbox"/>		Approved	12751	08/29/2023	06:44:13 AM	08:30:12 AM	BUS	
<input checked="" type="checkbox"/>		Approved	20838	08/29/2023	07:10:00 AM	08:20:00 AM	BUS	
<input checked="" type="checkbox"/>		Approved	13322	08/29/2023	03:09:02 PM	04:30:27 PM	BUS	
<input checked="" type="checkbox"/>		Approved	13750	08/30/2023	06:46:08 AM	08:31:24 AM	BUS	
<input checked="" type="checkbox"/>		Approved	20839	08/30/2023	07:10:00 AM	08:20:00 AM	BUS	
<input checked="" type="checkbox"/>		Approved	14453	08/30/2023	03:18:44 PM	04:30:47 PM	BUS	
<input checked="" type="checkbox"/>		Approved	20036	09/01/2023	06:45:00 AM	08:10:00 AM	BUS	

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”.

Timesheet					
Send Messages		+ Bulk Create	Delete	✕ Clear	✓ Bulk Edit
<input checked="" type="checkbox"/>	Punch In	Punch Out	Job Class	Activity	Vehicle
<input checked="" type="checkbox"/>	10:22:34 AM	11:35:11 AM	BUS DRIVER	02-Bus Sub	211

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 Edit Timesheet

Punch In

10:22:34 AM
✕
🕒

Punch Out

11:35:11 AM
✕
🕒

Job Class

BUS DRIVER
✕
▼

Activity

01-Bus
✕
▼

Status

Approved
✕
▼

Comment

/250

Cancel

Save

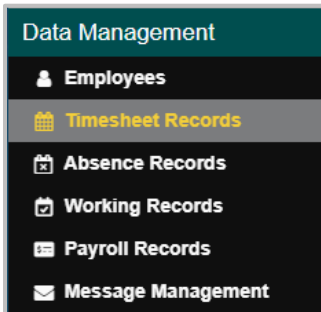
Bulk Create a New T-Record

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.

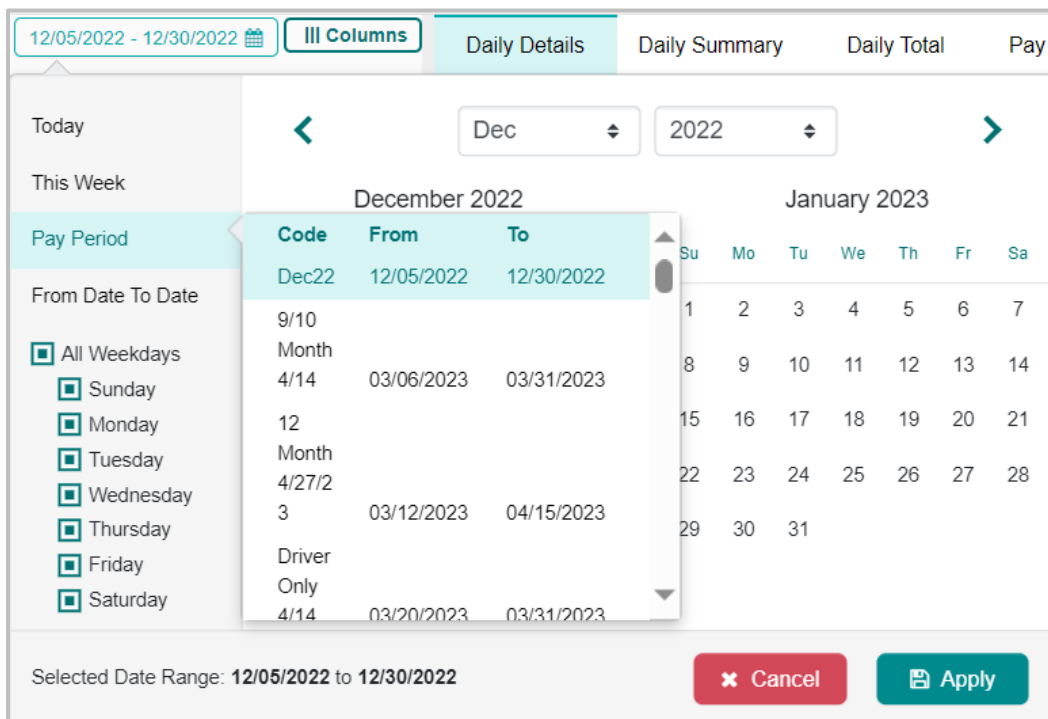
Here's How:

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.

12/05/2022 - 12/30/2022 III Columns

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

23 Results 2 Pages

Timesheet

Employee ID	Issue Code	Status	Job Class		Employee ID	T-ID	Date	Punch In	Punch Out	Job Class
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		269029	12/05/2022	07:15:00 AM	03:20:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Inactive	Transport...	<input type="checkbox"/>		268951	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		268977	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		269003	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		269055	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Inactive	Transport...	<input type="checkbox"/>		269081	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		269107	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		269133	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		269159	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...
<input checked="" type="checkbox"/>	Message needs s...	Active	Transport...	<input type="checkbox"/>		269185	12/05/2022	07:15:00 AM	03:15:00 PM	Transport...

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

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

Timesheet

Send Messages + Bulk Create Delete Clear Bulk Edit Pair Punch Export III Columns

	Employee ID	Issue ...	T-ID	Date	Punch In	Punch Out	Status
<input type="checkbox"/>			269393	12/05/2022	07:15:00 AM	03:15:00 PM	Approved
<input type="checkbox"/>			269419	12/05/2022	07:15:00 AM	03:15:00 PM	Approved
<input type="checkbox"/>			269445	12/05/2022	07:15:00 AM	03:15:00 PM	Approved
<input type="checkbox"/>			268953	12/07/2022	07:15:00 AM	03:15:00 PM	Approved

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

Bulk Create Timesheet

Record Type
 T-Record H-Record

Date* Punch In* Punch Out*

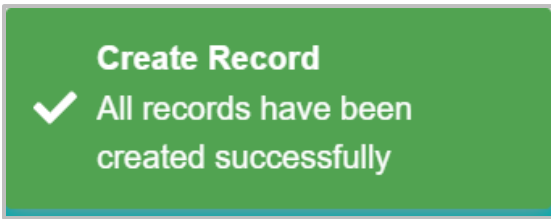
Job Class* Activity* Status*

Comment

0/250

Cancel
Save

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

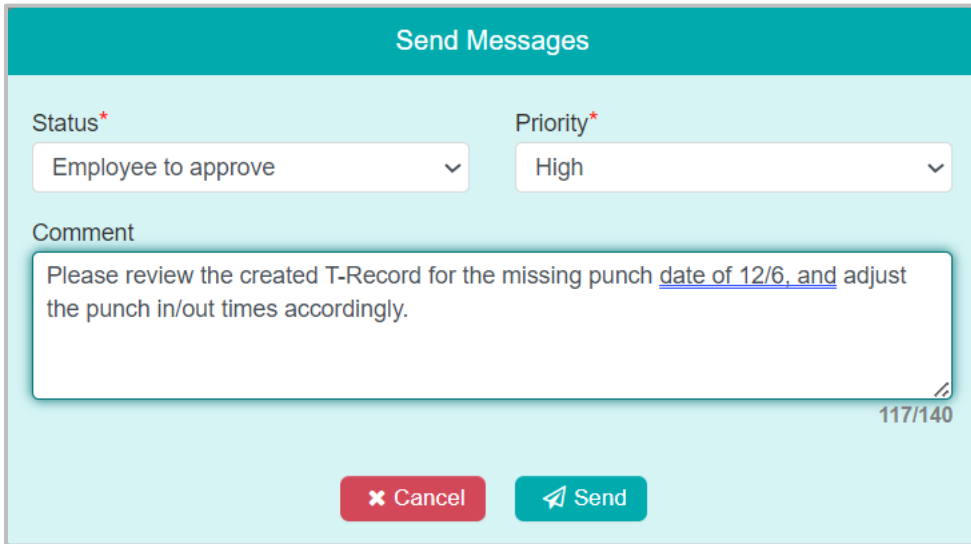


5. Send Message to Employees:

Once created, the user will select all the 12/06/2022 entries within the Timesheet card, and select the Send Message tool.

The screenshot shows a software interface for a "Timesheet" card. At the top, there are navigation tabs: "Daily Details" (selected), "Daily Summary", "Daily Total", "Pay Period Summary", and "Pay Period Total". Below the tabs is a teal header bar with the word "Timesheet" and a refresh icon. Underneath the header are several action buttons: "Send Messages" (with a mail icon), "+ Bulk Create", "Delete" (with a trash icon), "Clear" (with an 'x' icon), "Bulk Edit" (with a pencil icon), "Pair Punch" (with a double-check icon), "Export" (with a download icon), and "Columns" (with a list icon). The main area is a table with the following columns: "Employee ID", "Issue Code", "T-ID", "Date", "Punch In", "Punch Out", "Status", and "Job Class". The "Employee ID" column contains a large black redaction box. The "Date" column shows two dates: 12/06/2022 and 12/07/2022. The "Punch In" and "Punch Out" columns show times like 07:15:00 AM and 03:15:00 PM. The "Status" column has values like "Initial entry" and "Approved". The "Job Class" column shows "Transport...". Each row has a checkbox on the left and a warning icon (a triangle with an exclamation mark) next to it. The first row is selected, and the rest of the rows for 12/06/2022 are also selected. The last two rows are for 12/07/2022 and are not selected.

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.



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.

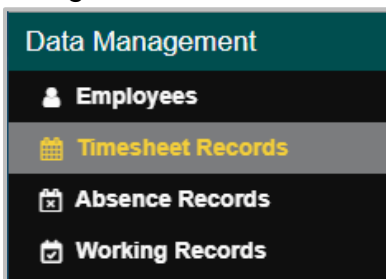
Here’s How:

1. Enter the Time and Attendance Application.



2. **Workflow within Timesheet Records:**

Navigate to the Timesheet Records Module.



3. Search Bar:

Search for the missing records using the following filters:

- Employee ID
- Miss Punch = One Punch

Search

Select or name new search + Filters

Employee ID ⌵ ✕

3967 i ✕

Miss Punch ✕

One Punch ✕ Select... i ✕

Q Search ⌵

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.

03/20/2023 - 03/31/2023 📅 ||| Columns

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.

03/20/2023 - 03/31/2023 📅 ||| Columns Daily Details Daily Summary Daily Total Pay I

Today < Mar 2023 >

This Week

Pay Period

From Date To Date

All Weekdays

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

Code	From	To
9/10		
Month		
4/14	03/06/2023	03/31/2023
12		
Month		
4/27/2		
3	03/12/2023	04/15/2023
Driver		
Only		
4/14	03/20/2023	03/31/2023
8/10		

Selected Date Range: 03/06/2023 to 03/31/2023

✕ Cancel 📄 Apply

Select the employee within the Data Panel.

5. Pair Punches:

Within the Timesheet card select the “Pair Punch” tool.



The screenshot shows the Timesheet interface with several tabs at the top: Daily Details, Daily Summary, Daily Total, Pay Period Summary, and Pay Period Total. Below the tabs is a teal header labeled 'Timesheet'. A toolbar contains buttons for Send Messages, Bulk Create, Delete, Clear, Bulk Edit, and Pair Punch. The Pair Punch button is highlighted with a red box. Below the toolbar is a table with columns: Employee ID, Issue, T-ID, Date, Punch In, Punch Out, Job Class, and Ac.

Employee ID	Issue	T-ID	Date	Punch In	Punch Out	Job Class	Ac
[Redacted]	One Punch	269494	12/06/2022	07:15:00 AM		Transport...	B
[Redacted]	One Punch	269499	12/06/2022		04:44:39 PM	Transport...	B

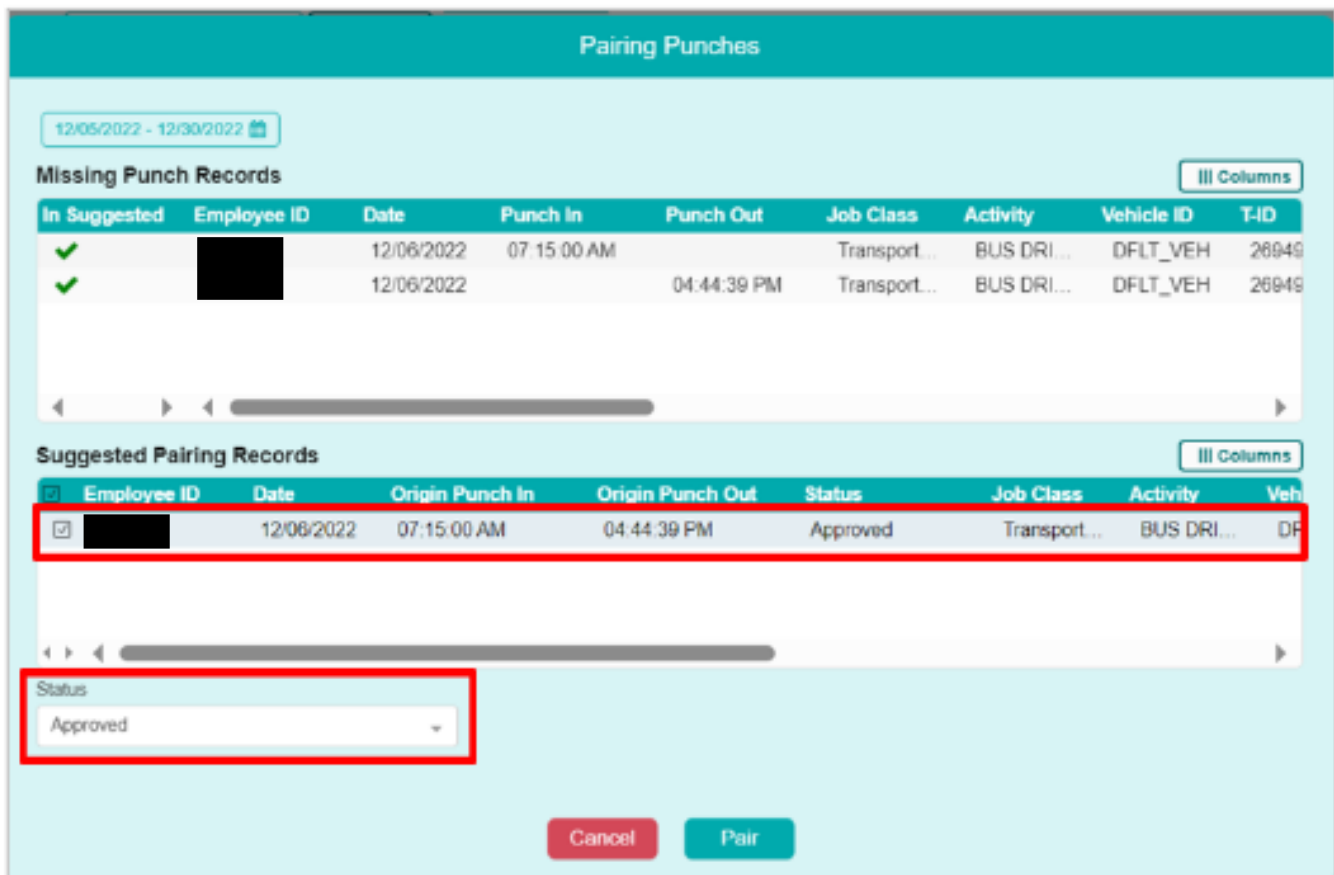
The user will be brought to the Pair Punches window where they will see any potential pairings identified within the Missing Punch Records table—these suggested pairings will be identified by green check-marks within the “In Suggested” column of the upper table.



The screenshot shows the Missing Punch Records table. The 'In Suggested' column is highlighted with a red box and contains two green checkmarks. The table has columns: Employee ID, Date, Punch In, Punch Out, and Job Class.

In Suggested	Employee ID	Date	Punch In	Punch Out	Job Class
✓	[Redacted]	12/06/2022	07:15:00 AM		Transport...
✓	[Redacted]	12/06/2022		04:44:39 PM	Transport...

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”.



The screenshot shows the Pairing Punches window. It features a date range selector (12/05/2022 - 12/30/2022) and two tables. The top table is Missing Punch Records, and the bottom table is Suggested Pairing Records. The Suggested Pairing Records table has columns: Employee ID, Date, Origin Punch In, Origin Punch Out, Status, Job Class, Activity, and Veh. A row in this table is highlighted with a red box, showing a status of 'Approved'. Below the table is a Status dropdown menu, also highlighted with a red box, with 'Approved' selected. At the bottom are Cancel and Pair buttons.

Employee ID	Date	Origin Punch In	Origin Punch Out	Status	Job Class	Activity	Veh
[Redacted]	12/06/2022	07:15:00 AM	04:44:39 PM	Approved	Transport...	BUS DRI...	DF

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.

Result: 0/6 Record is paired

<input type="checkbox"/>	Error Message	Employee ID	Punch In	Punch Out	Job Class	Activity
<input type="checkbox"/>	This payroll period has been locked.	[REDACTED]	01:14:56 PM	05:24:00 PM	Transport...	BUS ▲
<input type="checkbox"/>	Time overlap	[REDACTED]	05:21:49 AM	11:11:41 AM	Transport...	BUS ●
<input type="checkbox"/>	Time overlap	[REDACTED]	01:43:41 PM	01:43:44 PM	Transport...	BUS
<input type="checkbox"/>	Time overlap	[REDACTED]	05:31:33 AM	10:03:38 AM	Transport...	BUS ▼

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.



Daily Details		Daily Summary	Daily Total	Pay Period Summary	Pay Period Total		
Timesheet							
<input type="checkbox"/>	Employee ID	Issue ...	T-ID	Date	Punch In	Punch Out	Status
<input type="checkbox"/>	[REDACTED]		269444	12/30/2022	07:15:00 AM	03:15:00 PM	Approved
<input type="checkbox"/>	[REDACTED]		269470	12/30/2022	07:15:00 AM	03:15:00 PM	Approved
<input type="checkbox"/>	[REDACTED]		269494	12/06/2022	07:15:00 AM	04:44:39 PM	Approved

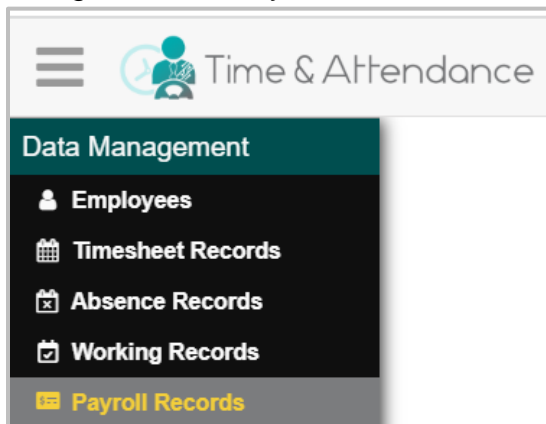
Create a Payroll Record

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:

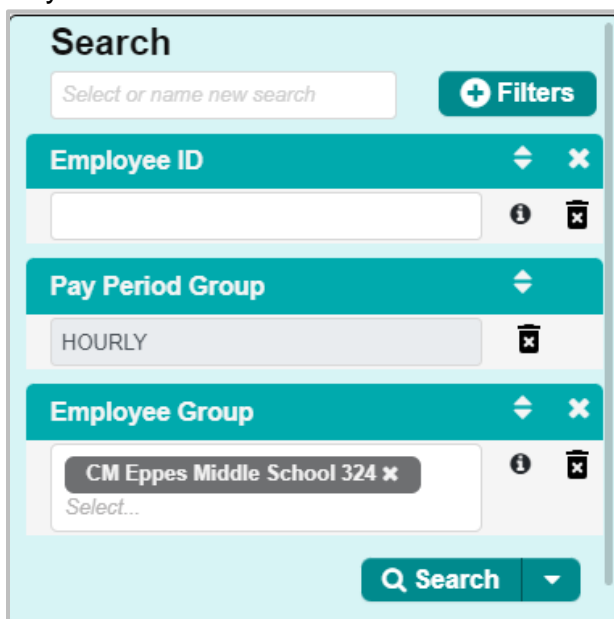
1. Workflow within Payroll Records:

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

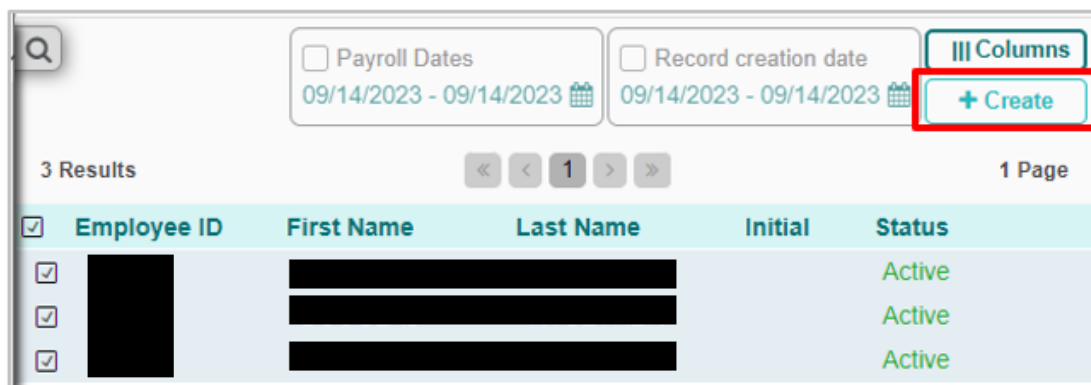


2. Search Bar:

Using the search bar and additional filters, query for the employee group you will be building the Payroll Record for.



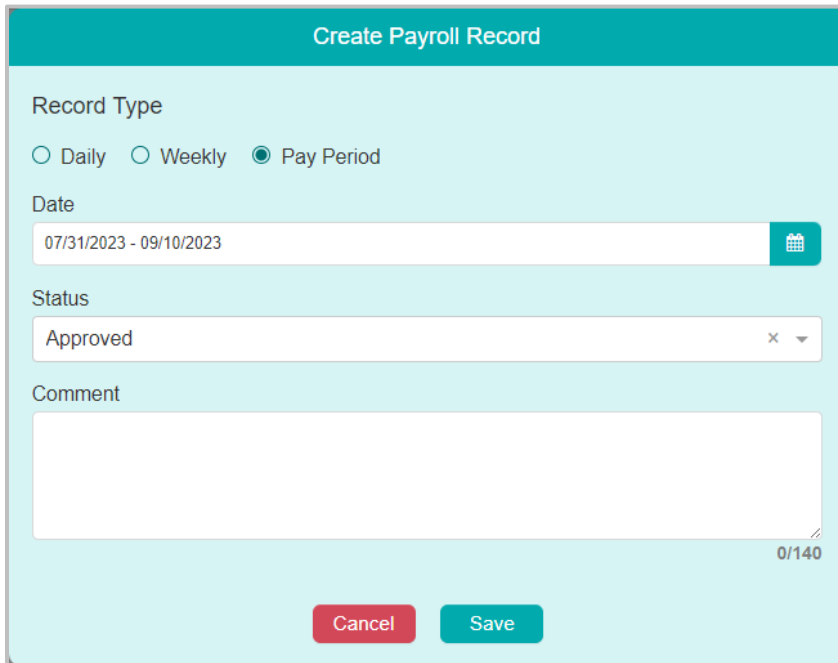
3. Select all employees within the Data Panel, before selecting Create.



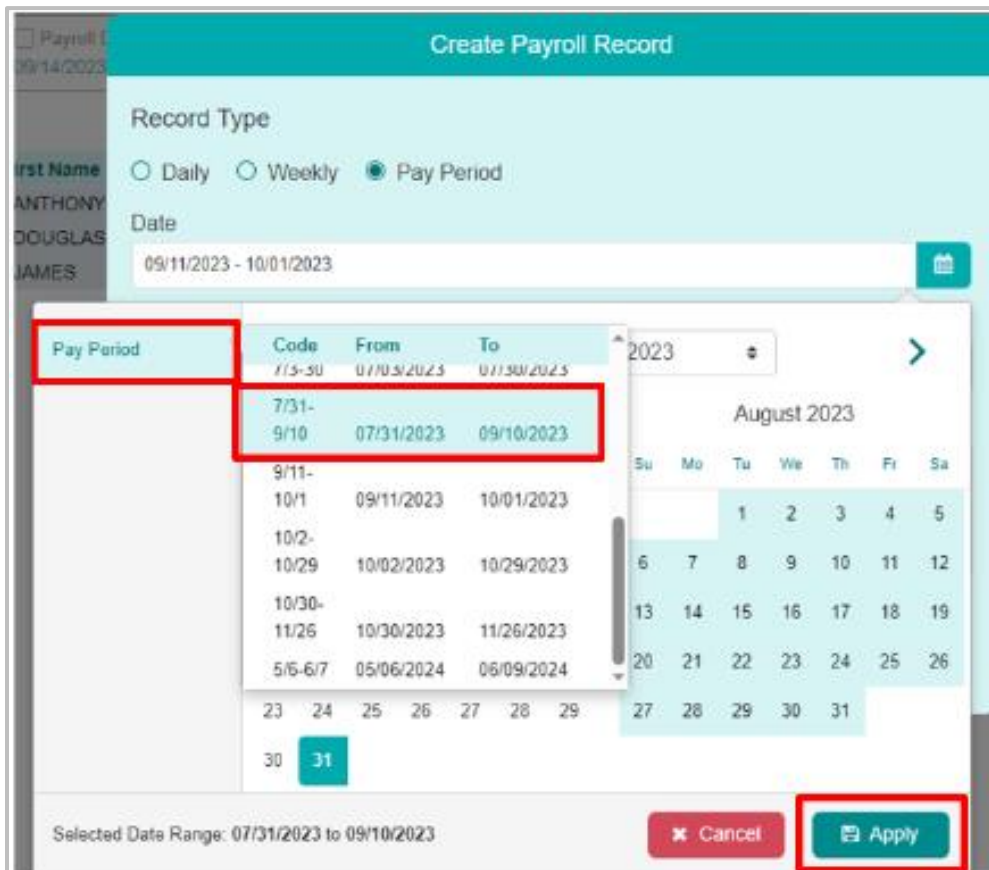
3.1 Create Payroll Record:

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.

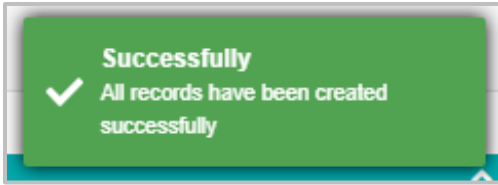


Selecting Pay Period:



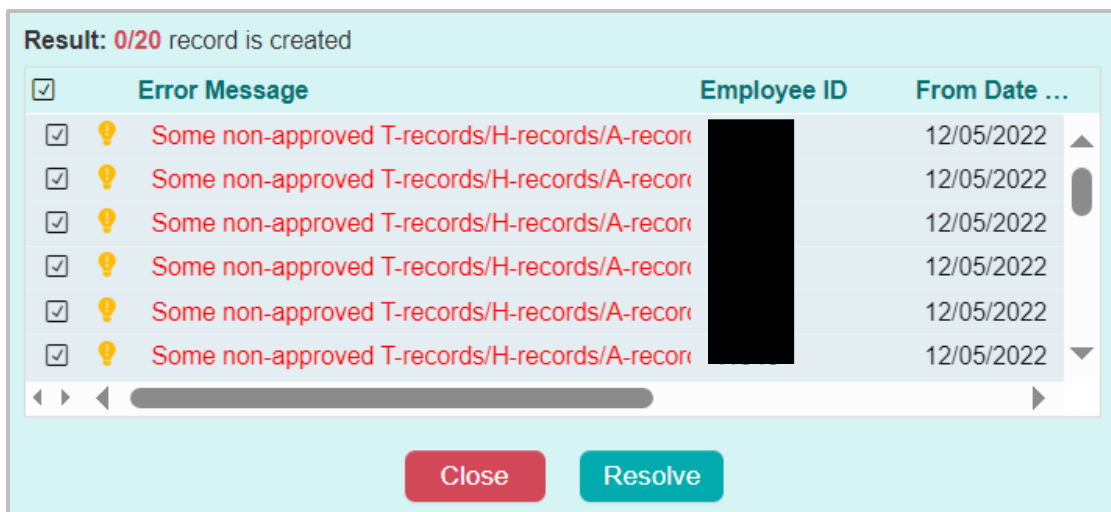
Pay Period	Code	From	To
7/31-9/10	7/31-9/10	07/31/2023	09/10/2023
9/11-10/1	9/11-10/1	09/11/2023	10/01/2023
10/2-10/29	10/2-10/29	10/02/2023	10/29/2023
10/30-11/26	10/30-11/26	10/30/2023	11/26/2023
5/6-6/7	5/6-6/7	05/06/2024	06/09/2024

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.

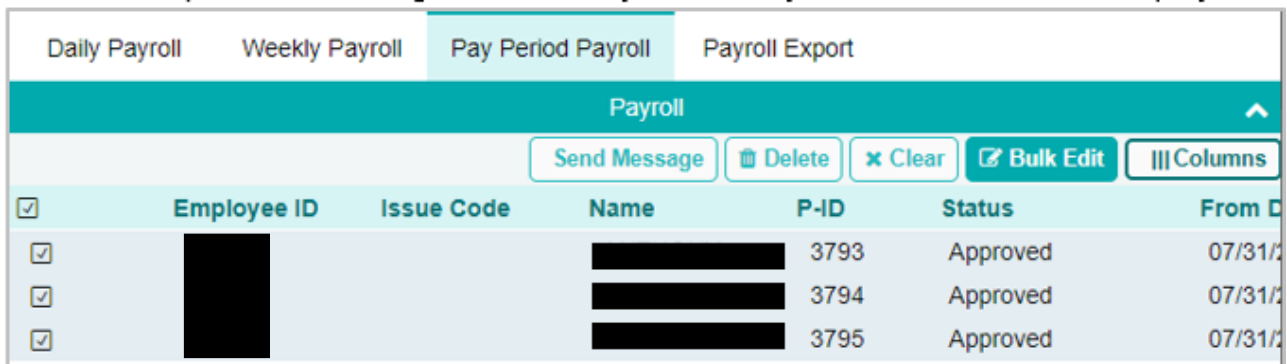


3.2 Common Error Message When Creating a Payroll Record:

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”.

Payroll						
<input checked="" type="checkbox"/>	Employee ID	Issue Code	Name	P-ID	Status	From D
<input checked="" type="checkbox"/>	[REDACTED]		[REDACTED]	3835	Approved	07/31/2
<input checked="" type="checkbox"/>	[REDACTED]		[REDACTED]	3963	Approved	07/31/2
<input checked="" type="checkbox"/>	[REDACTED]		[REDACTED]	4035	Approved	07/31/2

Payroll Export Record						
Success	2124	Error	3062	Remove ✕	Finalize ⬇️	Columns
<input type="checkbox"/>	Employee ID	Date	Error Message	Error Detail	Created By	
<input type="checkbox"/>	[REDACTED]	08/01/2023	Unplanned Absence		pitt-nc@e ^	
<input type="checkbox"/>	[REDACTED]	08/02/2023	Unplanned Absence		pitt-nc@e	
<input type="checkbox"/>	[REDACTED]	08/03/2023	Unplanned Absence		pitt-nc@e	

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.

Payroll						
<input checked="" type="checkbox"/>	Employee ID	Issue Code	Name	P-ID	Status	From D
<input checked="" type="checkbox"/>	[REDACTED]		[REDACTED]	3835	Approved	07/31/2
<input checked="" type="checkbox"/>	[REDACTED]		[REDACTED]	3963	Approved	07/31/2
<input checked="" type="checkbox"/>	[REDACTED]		[REDACTED]	4035	Approved	07/31/2

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.