



EDULOG

ATHENA TIME AND ATTENDANCE

Working Records Training Resource Guide

Smarter Transportation.



Working Records

Training Resource Guide

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WORKING RECORDS TRAINING RESOURCE GUIDE

PURPOSE OF THIS GUIDE

The Working Records Training Resource Guide will provide you with explanations of the basic tools within Athena, walk you through the procedure of creating a Working Record 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.

ATHENA WORKING RECORDS INTRODUCTION

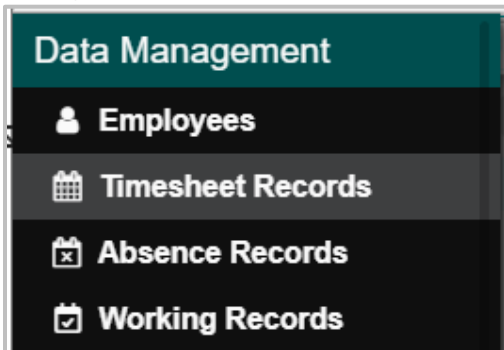
The workflow of recording an employee's working hours for an identified pay period takes place within the Working Records Module. Following the creation of a Pay Period, the user will navigate into the Working Records Module to create a Working Record (W-Record) identifying the default hours an employee will work during a given week.

NAVIGATING THE WORKING RECORDS MODULE

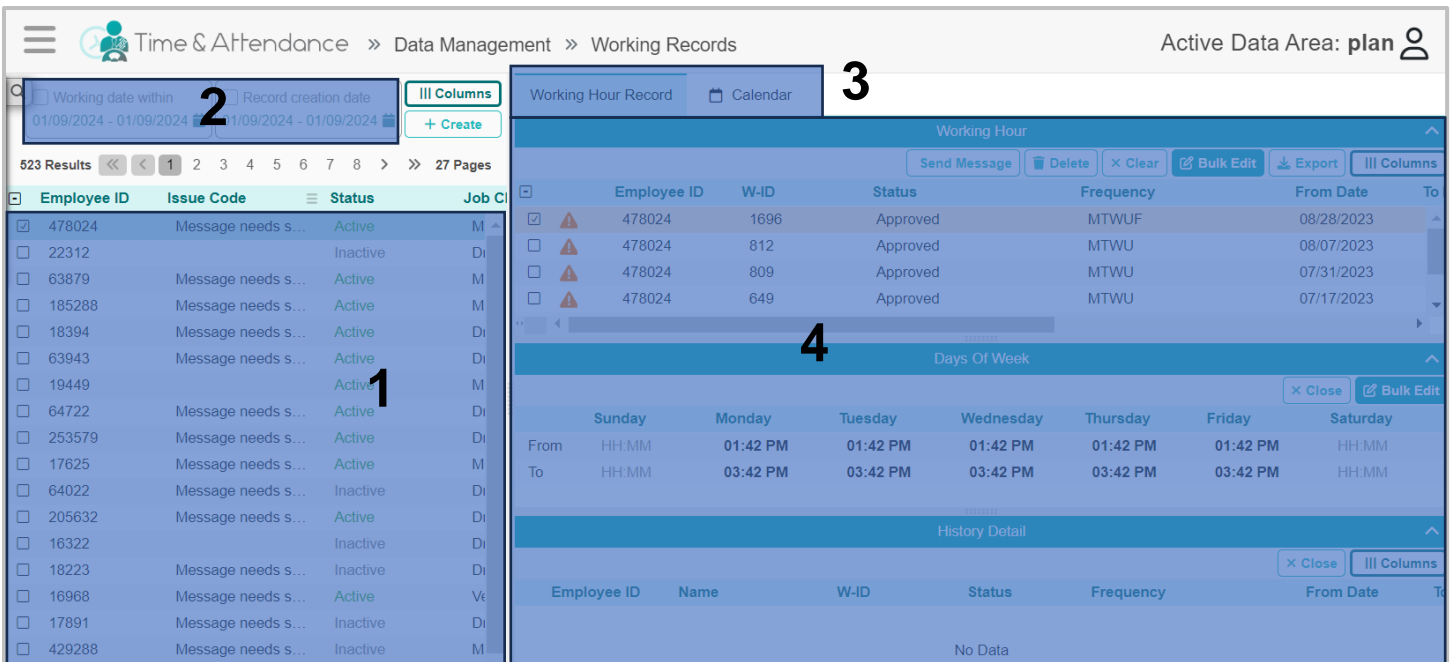
1. Enter the Time and Attendance Application.



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



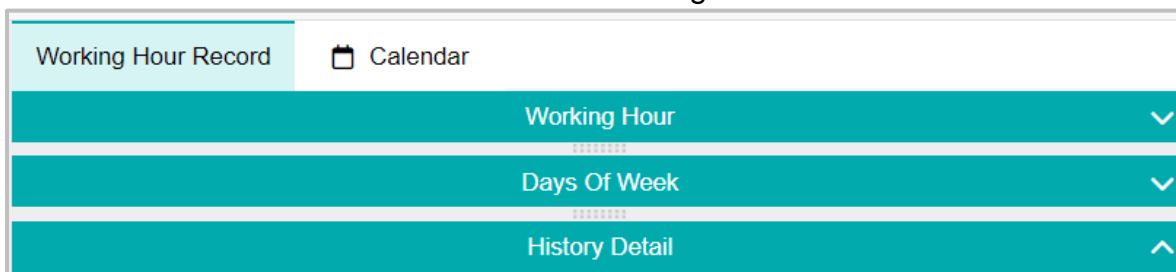
3. Working Records—Module Interface



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. Working Tabs: There are two tabs that display different types of data related to W-Records.
4. Workspace Panel Cards: There are three cards in the Workspace Panel: Working Hour, Days of Week, and History Detail.

4. Workspace Panel Cards:

Within the Working Hour Record tab, the user can make changes to an employee's working records. There are three cards within the Working Hour Record tab:



4.1 Working Hour:

Will show W- records that belong to the selected employee(s). Within the Working Hour Card user have the following capabilities:

- Send a Message to a User
- Delete a Working Record
- Bulk Edit

Working Hour				
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>				
Employee ID	Name	W-ID	Status	
TEST01	Test1 Test	1908	Approved	

4.1.1. Message Employees to Correct W-Record:

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

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

Send Messages

Status*

Priority*

Comment

0/140

4.1.2. Delete a W-Record:

Users have the ability to delete a W-Record that no longer reflects the selected employee's working hours.

- **Note:** Users should keep in mind that Working Records are unable to be deleted once a payroll has been finalized.

Confirmation

This will delete 1 record(s). Are you sure you want to delete?

4.1.3. Bulk Edit W-Record:

The Bulk Edit tool allows employees the ability to both adjust a current W-Records Date Range or Working Hours, or allows supervisors the ability to approve employee records in bulk.

Bulk Edit W-Record

Working Daily Section **From - To Time**

From - To time
x
v

HH:MM - HH:MM
🕒

Frequency

Days Of Week	From - To Time	
Sunday		🕒
Monday		🕒
Tuesday		🕒
Wednesday		🕒
Thursday		🕒

Status

|
▲

Approved

Supervisor review

Comment

0/140

Cancel

Save

4.2 Days of Week:

This card will display the days and working hours for the W-record selected within the Working Hour card.

Days Of Week							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
From	HH:MM	01:15 PM	01:15 PM	01:15 PM	01:15 PM	01:15 PM	HH:MM
To	HH:MM	03:15 PM	03:15 PM	03:15 PM	03:15 PM	03:15 PM	HH:MM

Within the Days of Week card the user has the additional ability to edit the Working Hours for the selected record.

- The user will notice by entering the “Edit W-Record” window through the Days of Week card, the working hours for the selected record will populate in the lower table.

Edit W-Record

Working Daily Section From - To Time

From - To time HH:MM - HH:MM

Date

01/02/2024 - 02/02/2024

Days Of Week	From - To Time			<input type="button" value="🕒"/>
Sunday				<input type="button" value="🕒"/>
Monday	01:15 PM	-	03:15 PM	<input type="button" value="x"/> <input type="button" value="🕒"/>
Tuesday	01:15 PM	-	03:15 PM	<input type="button" value="x"/> <input type="button" value="🕒"/>
Wednesday	01:15 PM	-	03:15 PM	<input type="button" value="x"/> <input type="button" value="🕒"/>
Thursday	01:15 PM	-	03:15 PM	<input type="button" value="x"/> <input type="button" value="🕒"/>
Friday	01:15 PM	-	03:15 PM	<input type="button" value="x"/> <input type="button" value="🕒"/>

Comment

Directly Approved - Approved on 1/13/24

39/140

4.3 History Detail:

Will display the history of changes made to the selected W-record.

History Detail							
Employee ID	Name	W-ID	Status	Frequency			
▼ TEST01	Test1 Test	1908	Approved	MTWUF			
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Fr... HH:MM	01:45 PM	01:45 PM	01:45 PM	01:45 PM	12:45 PM	HH:MM
	To HH:MM	03:45 PM	03:45 PM	03:45 PM	03:45 PM	02:35 PM	HH:MM
> TEST01	Test1 Test	1908	Supervisor review	MTWUF			

ATHENA 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:

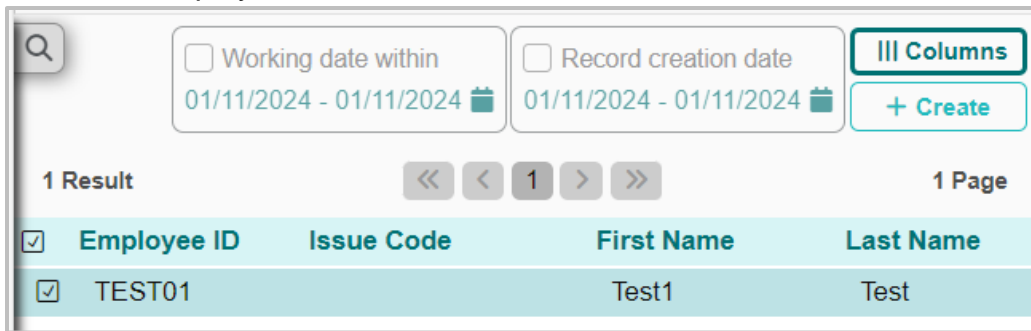
- [Create a Working Record](#)
- [Bulk Edit a Working Record Status](#)
- [Bulk Edit Days of the Week in a Working Record](#)

1. Create a Working Record

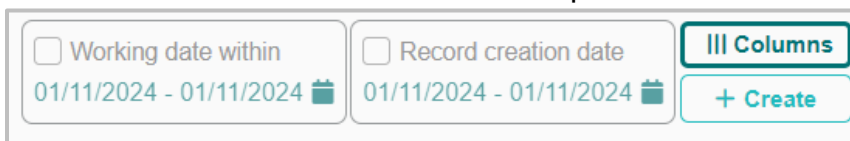
Your supervisor tasked you with creating your W-Record for the upcoming 01/02/24 – 02/02/24 pay period.

Here's How

1. Select an Employee Record in the left Data Panel.



2. Select the “Create” tool located at the top of the Data Panel



2.1. Create W-Record Window:

Selecting the “Create” tool will populate the “Create W-Record” window where the user will set the following:

Create W-Record

Working Daily Section

From - To time x

From - To Time

01:45 PM - 03:45 PM x 🕒

Date

01/02/2024 - 02/02/2024 📅

Days Of Week	From - To Time
Monday	01:45 PM - 03:45 PM x 🕒
Tuesday	01:45 PM - 03:45 PM x 🕒
Wednesday	01:45 PM - 03:45 PM x 🕒
Thursday	01:45 PM - 03:45 PM x 🕒
Friday	12:45 PM - 02:35 PM x 🕒
Saturday	🕒

Status

Supervisor review x ▲

Approved

Initial entry

Supervisor review

Cancel
Save

a.) Date Range: Select the calendar icon within the upper Date field, and reselect the date range for the timeframe you are creating W-Records for.

From Date To Date < Feb 2024 >

All Weekdays

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

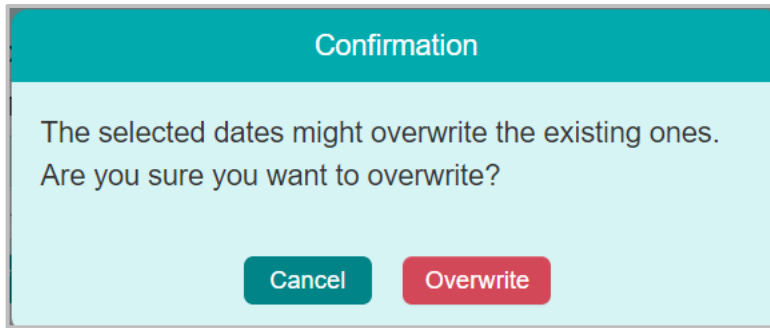
February 2024 March 2024

Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3						1	2
4	5	6	7	8	9	10	3	4	5	6	7	8	9
11	12	13	14	15	16	17	10	11	12	13	14	15	16
18	19	20	21	22	23	24	17	18	19	20	21	22	23
25	26	27	28	29			24	25	26	27	28	29	30
							31						

Selected Date Range: 03/04/2024 to 03/29/2024

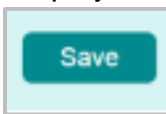
x Cancel
📅 Apply

Selecting “Apply” will populate the following confirmation window, where the user will select “Overwrite”. Following the selection of “Overwrite” will the user see the From-To Time populate in the lower table.



- b.) Default From-To Time: If the employee is working regular hours for the selected Date Range, detail that From-To time here.
- c.) From-To Time for Specific Days of the Week: If there are days that the From-To Time differs from the Default Time, the user can change the time for the affected day(s) in the lower card.

3. After filling in all the values, the user will select “Save” to create the W-Record for the selected Employee.



3.1. The user can find the newly created W-Record populate within the “Working Hour” card of the Workspace Panel.

Working Hour Record		Calendar				
Working Hour						
<input type="button" value="Send Message"/> <input type="button" value="Delete"/> <input type="button" value="X Clear"/> <input type="button" value="Bulk Edit"/> <input type="button" value="Export"/> <input type="button" value="Columns"/>						
<input type="checkbox"/>	Employee ID	Name	W-ID	Status	Frequency	
<input type="checkbox"/>	TEST01	Test1 Test	1908	Supervisor review	MTWUF	

2. Bulk Edit a Working Record Status

You are the supervisor of your team, and you requested that all your routers create W-Records for the upcoming pay period. Following their creation of the W-Records, you need to go through and approve their records within the Working Hour card.

Here’s How

1. Select the Employee Record in the left Data Panel.

The screenshot shows a data panel with search filters and a table. The filters include 'Working date within' and 'Record creation date', both set to '01/11/2024 - 01/11/2024'. There are buttons for 'Columns', 'Create', and pagination controls. The table has one result with the following data:

Employee ID	Issue Code	First Name	Last Name
TEST01		Test1	Test

2. Within the Working Hour card of the Workspace Panel, select all W-Records that need to be edited.

- Select the checkbox before the W-Record to enable the tool.

The screenshot shows the 'Working Hour Record' card with a 'Calendar' icon. The card title is 'Working Hour'. Below the title are buttons for 'Send Message', 'Delete', 'Clear', 'Bulk Edit', 'Export', and 'Columns'. The table below has the following data:

Employee ID	Name	W-ID	Status	Frequency
<input checked="" type="checkbox"/> TEST01	Test1 Test	1908	Supervisor review	MTWUF

3. Bulk Edit Tool:

Select the "Bulk Edit" tool in the Working Hour card to populate the "Bulk Edit W-Record" window.



Within the window, the user can change the status to "Approved" and leave a comment documenting the reason for the change.

Bulk Edit W-Record

Working Daily Section

From - To time x ▾

From - To Time

HH:MM - HH:MM 🕒

Frequency

▾

Days Of Week	From - To Time	
Sunday		🕒
Monday		🕒
Tuesday		🕒
Wednesday		🕒
Thursday		🕒

Status

Approved ▾

Comment

Approved on 1/13/24

19/140

Cancel
Save

4. Selecting “Save” the user will see the selected W-Records status change to “Approved” within the Working Hour card.

Working Hour ^						
 Send Message Delete x Clear Bulk Edit Export Columns 						
☐	Employee ID	Name	W-ID	Status	Frequency	
☐ ⚠	TEST01	Test1 Test	1908	Approved	MTWUF	

3. Bulk Edit Days of the Week in a Working Record

Following the creation of your W-Record for the 01/02/24 – 02/02/24 pay period, you realized you had entered the incorrect hours for that day range. To Edit your Working Record, you will use the Bulk Edit tool within the Day of Week card, to make the appropriate changes to the Working Hours for that selected Date Range.

Here’s How

1. Select the Employee Record in the left Data Panel.

Working date within 01/11/2024 - 01/11/2024 Record creation date 01/11/2024 - 01/11/2024 **Columns** **+ Create**

1 Result << < 1 > >> 1 Page

<input checked="" type="checkbox"/>	Employee ID	Issue Code	First Name	Last Name
<input checked="" type="checkbox"/>	TEST01		Test1	Test

- Within the Working Hour card of the Workspace Panel, select all W-Records that need to be edited.
 - To view the other cards in the Workspace Panel, the user must select the record not the checkbox. The user will see the record highlight yellow, and the other cards appear below.

Working Hour Record Calendar

Working Hour

Send Message Delete Clear Bulk Edit Export **Columns**

<input type="checkbox"/>	Employee ID	Name	W-ID	Status	Frequency
<input type="checkbox"/>	TEST01	Test1 Test	1908	Approved	MTWUF

Days Of Week

Close **Bulk Edit**

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
From	HH:MM	01:45 PM	01:45 PM	01:45 PM	01:45 PM	12:45 PM	HH:MM
To	HH:MM	03:45 PM	03:45 PM	03:45 PM	03:45 PM	02:35 PM	HH:MM

History Detail

Close **Columns**

<input type="checkbox"/>	Employee ID	Name	W-ID	Status	Frequency	From Date
<input type="checkbox"/>	TEST01	Test1 Test	1908	Supervisor review	MTWUF	01/02/20

3. Bulk Edit Tool:

Select the "Bulk Edit" tool in the Days of the Week card to populate the "Bulk Edit W-Record" window.

Days Of Week

Close **Bulk Edit**

Edit W-Record

Working Daily Section **From - To Time**

From - To time HH:MM - HH:MM

Date

01/02/2024 - 02/02/2024

Days Of Week	From - To Time			<input type="button" value="🕒"/>
Sunday				<input type="button" value="🕒"/>
Monday	01:45 PM	- 03:45 PM	<input type="button" value="x"/>	<input type="button" value="🕒"/>
Tuesday	01:45 PM	- 03:45 PM	<input type="button" value="x"/>	<input type="button" value="🕒"/>
Wednesday	01:45 PM	- 03:45 PM	<input type="button" value="x"/>	<input type="button" value="🕒"/>
Thursday	01:45 PM	- 03:45 PM	<input type="button" value="x"/>	<input type="button" value="🕒"/>
Friday	12:45 PM	- 02:35 PM	<input type="button" value="x"/>	<input type="button" value="🕒"/>

Comment

Directly Approved - Approved on 1/13/24 39/140

3.1. Edit Days of the Week:

Within the Bulk Edit Window, the user will adjust the driver's "From-To Time" to 1:15PM – 3:15PM by updating the time in the upper "From-To Time" field.

Edit W-Record

Working Daily Section **From - To Time**

From - To time 01:15 PM - 03:15 PM

Date

The user will then reselect the Date Range this updated "From-To Time" will be applied to.

Date
📅

Last N

From Date To Date

All Weekdays

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

⏪

Jan

2024

⏩

January 2024							February 2024						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6					1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31				25	26	27	28	29		

Selected Date Range: 01/02/2024 to 02/02/2024

✕ Cancel
📌 Apply

By applying the Date Range, the user will see the following confirmation window asking the user to “Overwrite” the previous data:

Confirmation

The selected dates might overwrite the existing ones.
Are you sure you want to overwrite?

Cancel
Overwrite

The user will the “From-To Time” applied to the “Days of Week” table.

Edit W-Record

Working Daily Section

From - To time x

From - To Time

01:15 PM - 03:15 PM x

Date

01/02/2024 - 02/02/2024

Days Of Week	From - To Time			
Sunday				
Monday	01:15 PM	-	03:15 PM	x
Tuesday	01:15 PM	-	03:15 PM	x
Wednesday	01:15 PM	-	03:15 PM	x
Thursday	01:15 PM	-	03:15 PM	x
Friday	01:15 PM	-	03:15 PM	x

Comment

Directly Approved - Approved on 1/13/24

39/140

Cancel
Save

4. Selecting “Save” will finalize the changes made within the “Edit W-Record” window, and will populate the following confirmation window, and display the changes within the Days of Week card of the Workspace panel.

Bulk Edit W-Record

All records have been bulk edited successfully

Days Of Week							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
From	HH:MM	01:15 PM	01:15 PM	01:15 PM	01:15 PM	01:15 PM	HH:MM
To	HH:MM	03:15 PM	03:15 PM	03:15 PM	03:15 PM	03:15 PM	HH:MM

x Close
 Bulk Edit