Using Time and Attendance Administration

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CYBORG SYSTEMS

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Contents

PART 1

Introduction

In This Section

CHAPTER 1

About This Manual

Welcome

This manual has been designed to guide you through the use of Time and Attendance Administration.

It will not only serve as a reference document, but it will also be used in our classroom training. You will find sufficient detail in this manual for self-study, both before and after classroom training.

Who should use this manual?

This documentation is designed to be used by a number of different users. The following users will find it most useful:

- Payroll Administrators

Payroll Administrators will find it helpful to read through the entire manual, concentrating on Parts 1 through 3. These parts provide a big picture of the system and also cover considerations for implementing it.

- Payroll and time reporting personnel

All personnel who will be using Time and Attendance Administration should read Part 1 to obtain an overview of the system. Additional parts should be read as they apply.

Prerequisite skills

Users of this documentation should possess a variety of technical skills and authorities, depending on the roles they will play. At a minimum, all users should have:

- A basic understanding of Microsoft Windows
- Attended training or have experience using The Solution Series
- Attended Cyborg's Using Human Resources Administration course, or have experience in the HR basic functionality, including an understanding of HR tables and option lists.

Additional documentation and training courses

The following documentation and training courses are available from Cyborg Systems to help you understand the basics of The Solution Series.

Documentation

Document	Description
eCyborg: Using the Web Client or Using The Solution Series: Administrative Solutions	This prerequisite documentation covers the introductory concepts and tasks related to Cyborg's administration solutions. It describes how to navigate through the software and explains important concepts and functionality of the system.

If you do not have a copy of this document, you can obtain one from Customer Support.

Training Courses

Related Course	Description
eCyborg: Using the Web Client or Using The Solution Series: Administrative Solutions	This prerequisite course covers the introductory concepts and tasks related to your specific implementation of Cyborg's administration solutions.

If you wish to attend any of these courses, contact Customer Support or visit our website www.Cyborg.com for details of course dates and availability.

How this manual is organized

This manual has been organized to make it as easy to use as possible. The chapters are grouped accordingly into the following parts:

Part	Chapters	Description
1. Introduction to Time and Attendance Administration	1—2	These chapters introduce Time and Attendance Administration by providing an overview of the system and explaining its interaction with other components of The Solution Series.
2. Setting Up Time and Attendance	3—7	These chapters provide an explanation of the concepts and detailed directions needed to set up Time and Attendance Administration.
3. Setting Up Employees for Time and Attendance	8—9	These chapters provide a detailed explanation of the procedures for setting up rotation patterns and badges.
4. Administering Time and Attendance	10—12	These chapters provide directions for capturing employee time and creating records for input to the payroll process.

Part	Chapters	Description
5. Appendices	A—D	The appendices provide quick references for reports, and also provide supplemental information, such as extended examples and technical information.

Following are descriptions of the chapters within the parts.

Part 1: Introduction

Part 1 describes this manual and gives an overview of Time and Attendance Administration.

Read this chapter		To learn about
1	About This Manual	How the manual is organized Where to find what you are looking for Who should use the manual Where to get help
2	Overview of Time and Attendance Administration	The features included in Time and Attendance Administration and how this component interfaces with other HR components and Payroll Administration

Part 2: Setting Up Time and Attendance

Part 2 describes how to set up the control structures and tables for Time and Attendance.

Read this chapter		To learn about
3	Getting Started with Time and Attendance	How to set up organization and employees
4	Implementing Time and Attendance Administration	Considerations for implementing Time and Attendance Administration
5	Setting Up Time and Attendance Policies	How to set up the tables for establishing your policies, including holidays, pay rules, and shift premiums
6	Setting Up Schedules	How to set up the tables for defining schedules and schedule activities, including grace, warning, and rounding routines for early and late starts
7	Setting Up Rotation Patterns	How to set up rotation patterns for work crews

Part 3: Setting Up Employees for Time and Attendance

Part 3 describes how to set up employee-level rules.

Read this chapter		To learn about
8	Setting Up and Maintaining Badges	How to set up and maintain employee badges
9	Assigning Employees to Time and Attendance	How to assign employees to schedules and rotation patterns

Part 4: Administering Time and Attendance

Part 4 describes how to perform the day-to-day tasks of assigning employees to Time and Attendance and creating time entries for input to the payroll process.

Read this chapter		To learn about
10	Tracking Employee Absences	How to account for employee absences, both paid and unpaid, and how that information is used in creating time entries
11	Capturing Employee Work Time	Clock transactions (rings) and how they are used
12	Working with Time Entries	How to create time entries from clock transactions (rings)

Part 5: Appendices

Part 5 contains the following quick reference appendices.

Use this appendix		To learn about
A	Report Quick Reference	Time and Attendance Administration reports and their business uses
B	Time and Attendance Examples	Extended, practical examples of using Time and Attendance
C	Queries and Maintenance	The Time and Attendance queries, and the program used to maintain Time and Attendance Administration.
D	Practice and Review Answers	Detailed answers to the practices and reviews at the end of the instructional chapters

How to use this manual

This manual has been designed as a reference manual as well as a training manual. It has been written to facilitate self-study before and after classroom training.

Table of contents

The manual has been carefully designed for ease of use. All our manuals are written to be task oriented to help you complete your business tasks using our software.

The table of contents lists all the tasks and their respective chapters.

Glossary of Terms

A Glossary of Terms section is provided to explain terms used in the documentation.

Index

An index is provided to help you locate specific information.

This document was designed to reduce your need for an index. You should find the table of contents sufficient.

Introductory chapters

It is important that you read the introductory chapters first. Chapter 1 ensures you get the most out of the information we have provided. Chapter 2 provides a high level overview. Read it to get the big picture before reading the detailed instructional chapters.

Instructional chapters

All chapters, other than the introductory chapters, are instructional chapters. They contain detailed instructions on how to complete the business tasks. Each instructional chapter has the following distinct sections:

Key Concepts

Always read the conceptual information first. This will help you understand why you have to perform certain tasks. It will also help you make decisions about your options and help you understand the importance of performing certain tasks. Exercises to help you apply the concept to a business task are included at the end of most concepts.

Apply the Concept

To be certain that you have understood the key concepts in a chapter, complete the Apply the Concept exercises provided. The answers to these exercises can be found in the appendices.

Detailed Directions

When you are ready to perform a task, review the Detailed Directions, which provide guidance, as well as the specific steps, to complete a task.

Guided Practice

The Guided Practice within the Detailed Directions offers you an opportunity to practice a task with step-by-step instructions. It takes you through the various steps, providing detailed examples so you can gain a comfort level with the task. Guided Practice is easy to locate.

For practice, type 'ABC Solutions'.

Note: To successfully follow the Guided Practice, you must have completed all the previous Guided Practice exercises in the manual. The Guided Practice uses the test data installed with our software. For the Guided Practice exercises to work, this test data must not have been altered.

All users who complete the Guided Practice must either have their own copies of the test data or have the test data restored for them.

Extended Practice

To be certain that you have understood the tasks in a chapter, complete the Extended Practice provided. The Extended Practice gives you the opportunity to complete one or more tasks without step-by-step guidance. The answers to these exercises can be found in the appendices.

Note: *To be able to complete the Extended Practice exercises in the manual, you must have completed all the previous exercises. You must also be using the test data delivered with the software. This test data must not have been altered.*

Review of Questions Answered

To be certain that you have understood all of the information in a chapter, complete the review questions provided at the end of a chapter. The answers to these questions can be found in the appendices.

Conventions used in this manual

The underlying page layout and design of this manual are meant to be as intuitive as possible for you. Our intent is to make it easy to navigate through the manual and concentrate on learning and doing.

Cross-references

Wherever appropriate, we provide cross-references to help you find additional information or further discussion of a specific topic.

☞ *Refer to a cross-reference to find more detail or more discussion on a given topic.*

Notes

Whenever there is important information you should be aware of, we provide a note.

Note: *You will find tips or quick techniques covered in notes.*

How to get additional help

If you can not find the answers to your questions in this manual, contact Customer Support, who will be able to answer specific questions and give you general advice on training.

Please visit our web site ***www.Cyborg.com*** (see "Cyborg Home - http://www.Cyborg.com") for the latest schedule of available courses and course descriptions.

Suggestions and feedback

We value your feedback on our performance support materials. Please forward any comments on this manual to Customer Support.

CHAPTER 2

Overview of Time and Attendance Administration

In This Chapter

Introduction to Overview of Time and Attendance Administration

Time and Attendance Administration is designed to help you effectively manage the time recording and calculation function in your organization.

Why use Time and Attendance Administration?

Time and Attendance Administration will help you manage your labor force by recording your employees' working hours and absences against company policies. This data is then used to produce time entries for input into a payroll system.

The use of an automated time recording system is an efficient means of processing employee hours. It means that a more accurate and timely system is introduced, which enables management to monitor employee attendances and absences accurately.

Time and Attendance Administration addresses time and labor cost issues, providing for increased profitability for you through:

- Elimination of lost time and system abuse
- Elimination of paper time entries and the associated costs
- Elimination of manual computation
- Elimination of hand-entered data errors
- Improved employee scheduling
- Improved control of labor costs
- Non-biased adherence to pay rules
- More accurate management information

Real cost savings are made and can be measured against better management of production time and elimination of errors and system abuse. Managers gain an important advantage in their efforts to meet objectives for profitability and productivity.

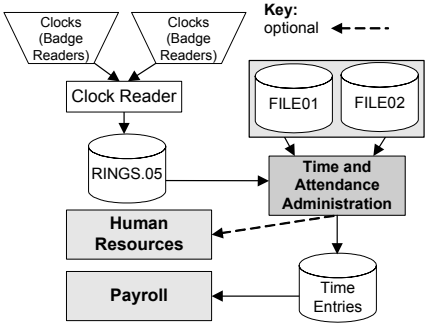
Time and Attendance Administration can be run as an integrated component (with Payroll Administration or Human Resources Administration) or as a standalone component.

As an integrated component, the time entries that are recorded by Time and Attendance Administration can be seamlessly transferred to Payroll Administration and used in the calculation of employee pay.

As a standalone Time and Attendance user you can use the system to produce time entries that you can transfer to your own in-house system or service bureau.

Overview of the Time and Attendance process

In order to implement Time and Attendance Administration, it is important to have a general understanding of the how the system works. The following diagram gives an overview of how Time and Attendance Administration works. It also shows how it is integrated with components of The Solution Series.



The following steps describe the typical Time and Attendance system data flow from time transaction input to time entry generation.

- Employees swipe their badge through a badge reader, creating clock transactions (rings). These clock transactions (rings) are temporarily stored on the badge readers. Each clock transaction (ring) includes a date, time, and badge number.
- The data on the badge readers is collected regularly and is stored on an input file (RINGS.05). The clock transaction (ring) file is imported into the Employee Database by a program called RINGS.
- Clock transactions (rings) are validated, exceptions are edited and time entries are created by the Time Entry Validation/Creation program.

When Time and Attendance Administration is being used as a standalone system, time entries are written to an external file by the Time Entry Utility form. This creates an extract file (FILE10) of time entry records which can than be used as input into your payroll system. For those customers who have Cyborg's Payroll Administration, the time entries produced by Time and Attendance Administration will be processed with your payrun.

Time and Attendance Administration features

These are the important features of Time and Attendance Administration:

- Rule-based, table-driven data structure
- Policy and schedule setup
- Human Resource information
- Employee absence tracking
- Reports and queries

Rule-based, table-driven data structure

Time and Attendance Administration features a table-driven data structure that gives you the flexibility to define, maintain and change policy and scheduling rules. These can be defined for your entire organization and for individual groups of employees.

Tables assist you in the analysis of time data and the calculation of paid time.

The advantages in using tables include:

- Providing a consistent means of applying your organization's rules on time and attendance to each employee.
- Providing an auditable history of your organization's rules against the actual attendance of your employees.
- Defining earnings categories for overtime and shift premiums hours.
- Defining policy regarding payment of overtime, docking and crediting, and clock transaction (ring) requirements for each type of activity.
- Defining company paid holidays and other days that would require special pay.

Tables carry an effective date, allowing you to maintain historical information and apply rules that will go into effect at a later time.

Policy and schedule setup

Policy and Schedule tables record the rules for a company or group of employees such as a crew. These tables include your organization's rules relating to work time procedures, such as clocking-in and out, docking for lateness, and overtime.

Time and Attendance Administration can track employee hours worked by:

- Employee and date
- Location
- Job function
- Shift premium
- Earnings type

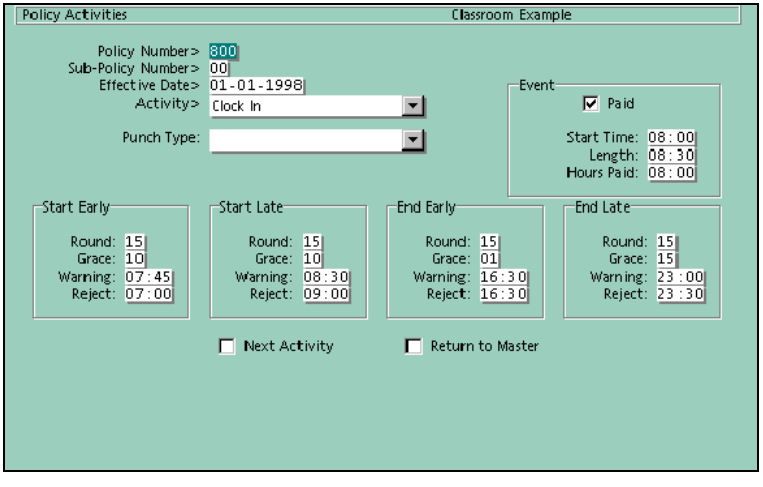
Your payment rules can be established:

- For an entire company
- For groups of employees
- By shift
- For holidays worked, non-work days, and regular work days
- For overtime calculations
- For paid absences

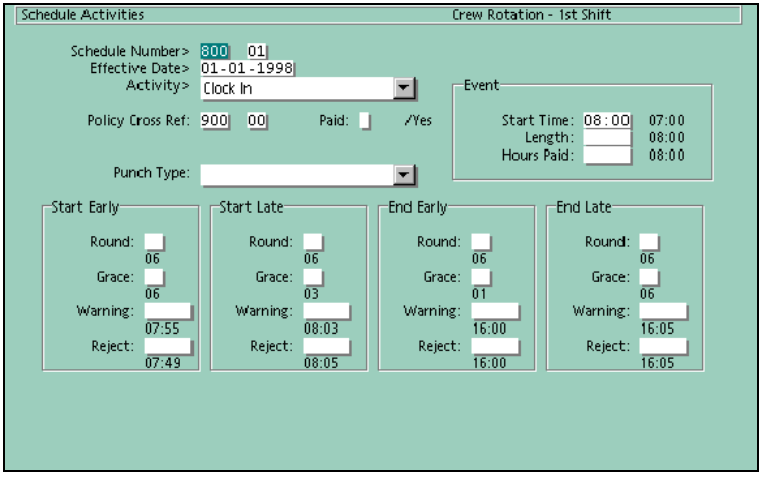
Global and specific policies

The system allows organization specific definition of all policies, including overtime and shift premiums. Unlimited labor splits provides the capability to handle comprehensive labor distribution. The virtually unlimited categorization of hours and earnings will cover any conceivable classification. The Time and Attendance system enables you to define daily activities such as shift assignments shift-start times, and meal-start times for the entire company or for employee groups.

The following diagram is an example of a policy at a global level:



The following diagram is an example of a policy at a specific level:



Rotating schedules

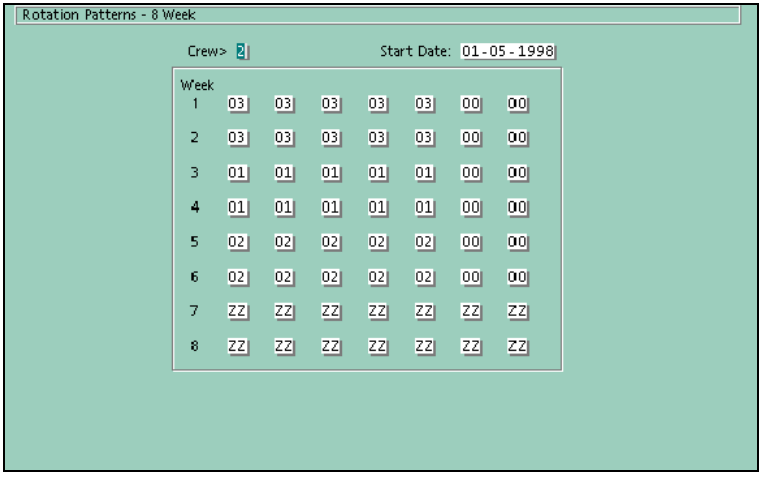
The Crew Rotation Facility is a rotation tool that allows you to rotate employees through shift assignment tables according to a specified pattern. This pattern makes up the employee's schedule. The word 'crew' represents a group of employees who rotate from one shift to another, following the rotation pattern.

Crew rotation benefits companies by providing the following:

- Work patterns for groups of employees who do not work a regular schedule
- Unique pay rules for scheduled non-work days

Some organizations have two or three different shifts in a working day. In a given period, a crew can be assigned to rotate through each of the different shifts. A crew might work one shift for a week then work a different shift the following week. You determine the crew rotation pattern through these shifts. The employee 'rotates' through the various shifts that define the pattern.

The following example shows an 8-week rotation pattern that has been in effect from January 15, 1989 for crew A.



Future date settings

Future date tables allow you to enter information with a future effective date at any time. For example, if the rules contained in an employee's schedule assignment are due to change, these changes can be recorded on a new schedule. This schedule can be set up with a future effective date. When this date is reached, the employees assigned to that schedule will use these new rules.

You may set up multiple schedule assignments, including future schedule assignments on the form. For example, imagine if you enter:

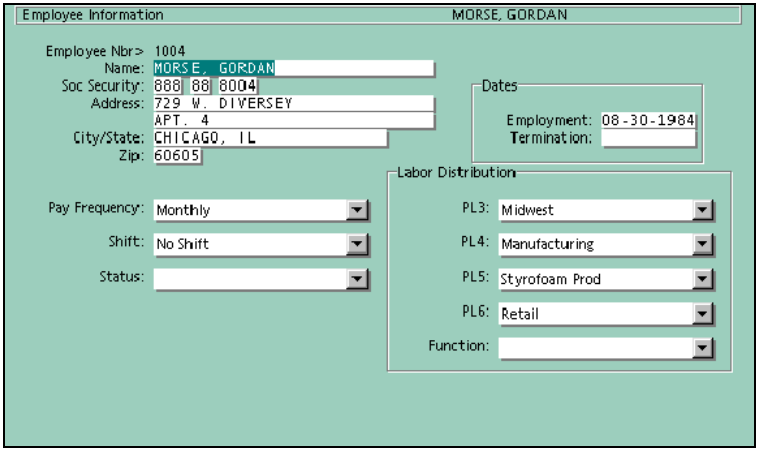
- An assignment date of 01-01-2001
- A Schedule Number 800
- A Sub-Schedule Number 01

In this example, Schedule 800-01 will be invoked when it encounters clock transactions with a date of 01-01-2001 or later.

Human Resource information

Extensive human resource information can be recorded with Time and Attendance Administration. Information on employee status, emergency contact data, work restrictions, injury and other medical information, education and training, skills and abilities, and detailed termination data can be maintained.

In this example, the Employee Information form (EF-SCR) used by standalone users is shown.



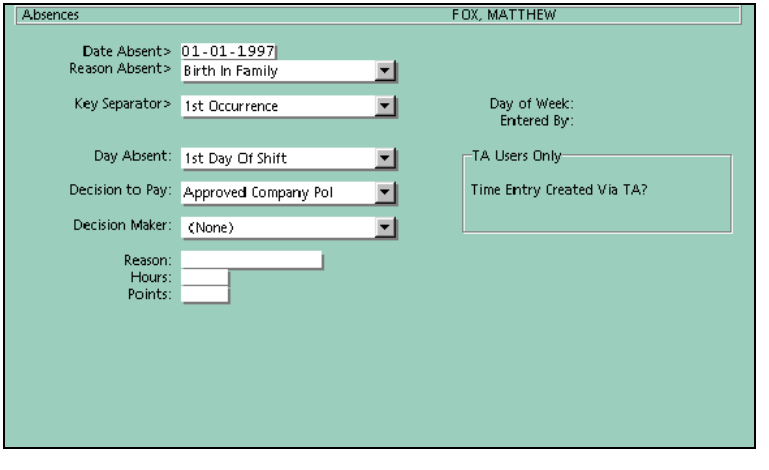
Employee absence tracking

Employee absence data can be tracked and reported by day, date and reason. This allows you to discern patterns and identify problem areas quickly and easily.

When an employee of your organization is absent from work, the ability to assign the type of absence the employee has taken is crucial to managing absences. Setting up your organization's absence types allows you to track employee absences effectively. You can identify absences by type and be able to spot trends in absence patterns.

Time and Attendance Administration also allows you to maintain an unlimited number of occurrences of employee data, giving you a complete picture of employee behavior and performance over any period of time. You can also determine if employees who are scheduled to be at work have arrived.

In this example, the Absence form (93-SCR) is shown.



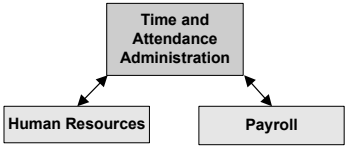
Reports and queries

Time and Attendance Administration features over 50 standard queries and periodic reports including absence queries and audit reports detailing all clock transactions, time entries, adjustments and company maintenance on a periodic basis.

☞ *Refer to* **Report Quick Reference** *(see "Schedule vs. Actual Hours report (TN68PT)" on page 348) for more information on Time and Attendance Administration reports.*

Time and Attendance Integration

Time and Attendance Administration can interact with other Solution Series components to provide additional information for decision-making purposes or calculations.



Payroll

A key feature of Time and Attendance Administration is its ability to interact with a payroll system.

Time and Attendance Administration is designed to record and automatically calculate your employee's paid and unpaid working hours. This data is recorded as time entries ready for transfer to a payroll system.

This payroll system can be Payroll Administration, another vendor's package, your own in-house system, or a service bureau.

Payroll Administration incorporates all the capabilities required for complete payroll administration. It can calculate 997 different earnings and deductions, and enables you to arrange direct deposits, perform payment reconciliation, keep history records and calculate workforce distribution. Periodic tax updates enhance the functionality of the product by maintaining up to the minute information on tax changes.

Human Resources

If your Time and Attendance Administration is integrated with the Human Resources Administration, you can use it to record various human resource information.

You can record information such as employee status, emergency contact data, work restrictions, injury and other medical information, education and training, skills and abilities, and detailed termination data.

Employee absence data can be tracked and reported by day, date, absence type, and paid or unpaid occurrence. A point system can also be developed to weight specific types of absences allowing you to discern patterns and identify problem areas quickly and easily. Also, time entries can be created from approved paid absence entries for use in your payroll system.

Cyborg's Human Resources Administration includes modules for benefits/pension administration, salary administration, position management, applicant tracking, workforce planning, employee health and safety, and employee relations.

Time and Attendance and Employee Self Service

The key function of Time and Attendance Administration is to generate time entries from clock transaction (rings). This is generally done using some type of electronic data collection device to record an employee's clock transactions (rings) that reflect clocking-in and out.

Time and Attendance Administration can function with our preferred data collection device hardware and software, or you can use your own existing electronic data collection device.

Various data collection devices can be used (for example badge readers, touch tone phones, an employee's PC or terminal keypad) to collect clock transactions (rings), as long as the resulting record is in the Cyborg required format. Cyborg provides the record layout requirements for the clock transaction which we refer to as a ring.

PART 2

Setting Up Time and Attendance

In This Section

CHAPTER 3

Getting Started with Time and Attendance

In This Chapter

Introduction

Before you can begin to implement Time and Attendance Administration, you must set up some basic information about your organization and add employees.

Most of the tasks in this section are intend to be used by users whose Time and Attendance system is not integrated with another Cyborg component. However, if your Time and Attendance system is integrated with either Payroll Administration or the Human Resources Administration, you should be familiar with all the concepts and tasks covered in this section.

Note: *If your Time and Attendance Administration is integrated with another Solution Series component, many of the tasks discussed in this section should be set up already.*

Tasks

The following tasks are discussed in this section:

- Adding a company to the system
- Adding a company name and address
- Setting up company options (standalone users only)
- Setting up employees (standalone users only)
- Setting up employee status (integrated users only)
- Setting up company earnings codes (HEDs)
- Viewing and up dating company HED information

Prerequisites

Before you complete the tasks in this section, you need to have identified the structure of your organization.

You should have an implementation plan in which you identified:

- Your organization's structure and how the different levels in The Solution Series are going to be defined to reflect this structure
- A convention for assigning identification numbers to employees
- How employees costs are to be allocated

☞ *Refer to the Implementing The Solution Series documentation for more information.*

Questions answered

The following questions are answered in this section:

1. What information is needed to establish a company?
2. What are organization levels and how are they used?
3. What is an employee status used for?
4. Which earning codes (HEDs) are supplied with the system?

Populating options lists

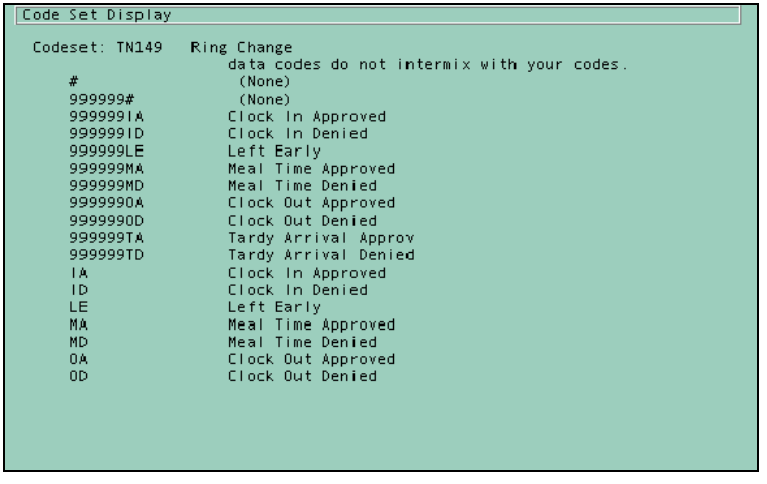
Before you begin to add any companies or employees to Time and Attendance Administration, we recommend that you populate the options lists that you will use.

Options lists are used on many of the list boxes found on the forms used to establish companies and add new employees. Options lists must be populated before you can select the proper options at the company or employee level.

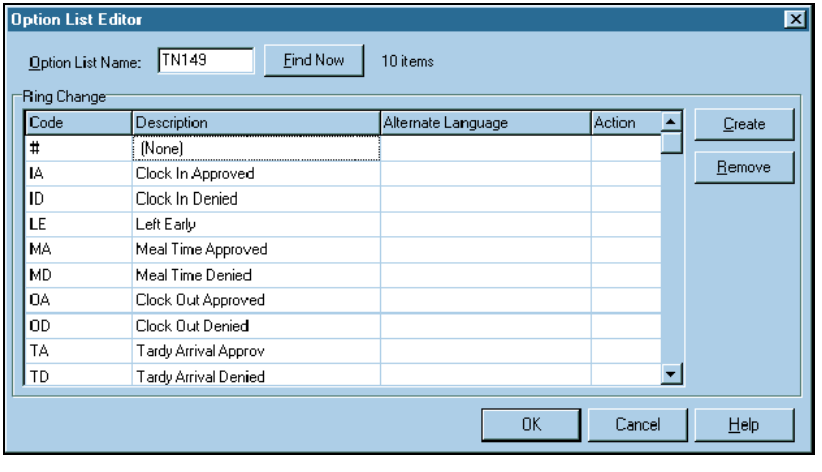
Each of the following options lists contains sample options. You should review these options lists and amend them to meet your organization's requirements.

Option List	Description
PR019	Organization level 3
PR029	Organization level 4
PR039	Organization level 5
PR049	Organization level 6
PR059	Function
PE049	Status Code - This is used on the Employee Information form
TN149	Ring Change - This is used on the Error Correction form
TA01	Absence Type - This is used on the Absence form
TA03	Absence Approval - This is used on the Absence form

The Code Set Display form is used to display the different options lists, as shown in the following example:



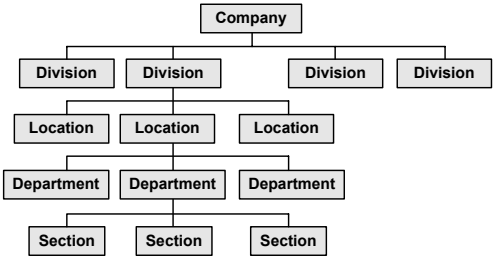
The Option Lists Editor (CSUPDT) is used to amend the contents of an option list. An example is shown below:



☞ *Refer to the Implementing The Solution Series documentation for more information on how to edit options lists.*

Your organization's structure and the Time and Attendance Solution

As part of your organization's implementation plan, you should have identified the organizational structure needed to set up Time and Attendance Administration.



The *Implementing The Solution Series* documentation should be used to help you make these decisions. When you have determined your organizational structure, you can then create it on Time and Attendance Administration system, by selecting and completing a series of forms.

☞ *Refer to the Implementing The Solution Series documentation for more information.*

When you have determined your organizational structure you will be able to set up this structure on the system using organization levels. You will also be able to establish criteria at the company level that will default to the employee level.

Before you can do this, you need to populate certain options lists with information that reflects the structure of your organization.

Apply the Concept
What are the different Organization Levels that will exist in your organization?

Defining Organizations

An organization identifies a group of employees who are governed by the same set of rules or policies, and eligible for the same earnings and deductions. Assigning a unique value to the first two Organization Level text boxes is the first step in defining a company.

Organization Level 1 is a two-character text box, and Organization Level 2 is a four-character text box. These two text boxes are commonly referred to as the Organization, and together they represent a company. Each company value is defined by you and can represent the unique company structure, processing parameters, and reporting requirements that apply to your organization.

The information and parameters defined at the company level apply to all employees in the company. You may supplement or override these values at the employee level, either on forms or in some cases through time entries.

Assigning organization levels

Your company structure must be properly identified before Time and Attendance Administration can be implemented. The system supports six Organization Levels to define your company structure. Within these levels, the values assigned to Organization Level 1 and Organization Level 2 are combined to form your company. The values assigned to Organization Levels 3 through 6 are subordinate to Organization Levels 1 and 2.

The table below indicates the length of each Organization Level text box, and the type of characters that may be entered in the text box:

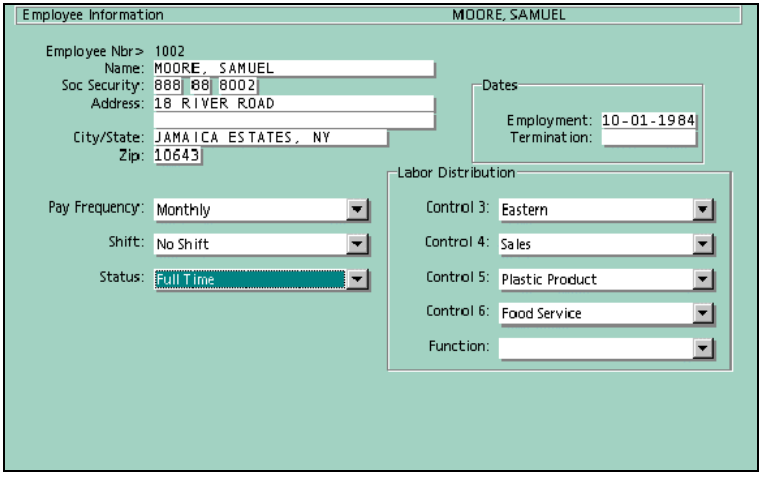
Organization	Number of Characters	Text Box Type	Description
1	2	Alphanumeric	Provides the system with a description of the highest organizational level within a company or legal entity (for example, corporation)
2	4	Alphanumeric	Provides the system with a description of the second organizational level within a company or legal entity (for example, division)
3	12	Alphanumeric	Provides the system with a description of the third organizational level within a company or legal entity (for example, region)
4	12	Alphanumeric	Provides the system with a description of the fourth organizational level within a company or legal entity (for example, department)
5	12	Alphanumeric	Provides the system with a description of the fifth organizational level within a company or legal entity (for example, section)
6	12	Alphanumeric	Provides the system with a description of the sixth organizational level within a company or legal entity (for example, building)

☞ *Refer to The Implementing The Solution Series documentation, for more information on how to set up option lists.*

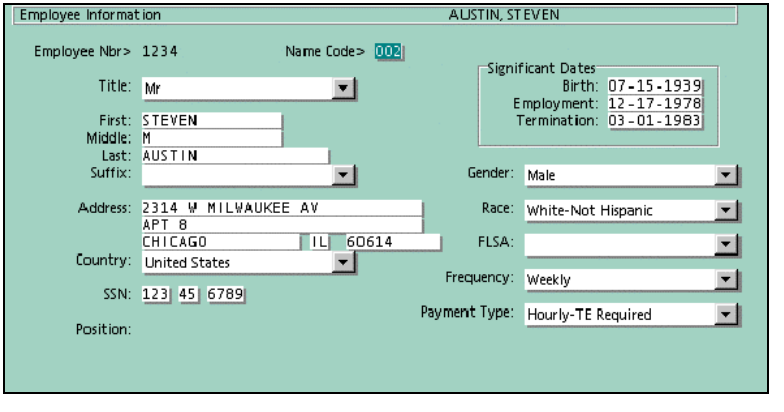
Adding new employees

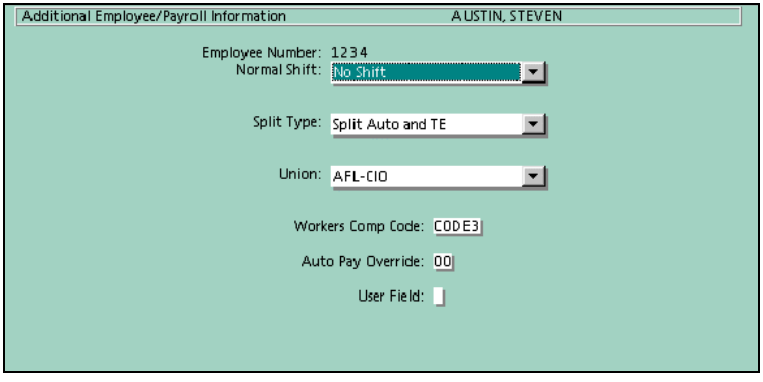
When you have created a company, you can add employees to Time and Attendance Administration.

If you are a standalone Time and Attendance user, you will use the Employee Information form (EX-SCR):



If your Time and Attendance Administration is integrated with another Cyborg Administration, such as Payroll Administration, you will use the Employee Information form (EF-SCR):

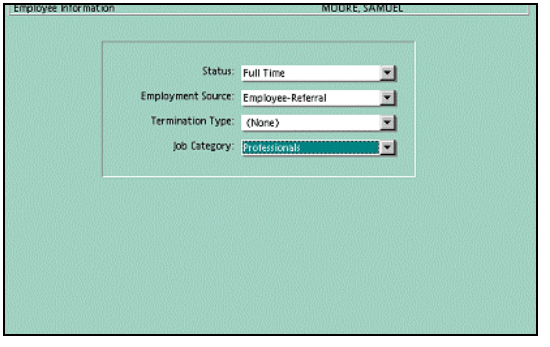




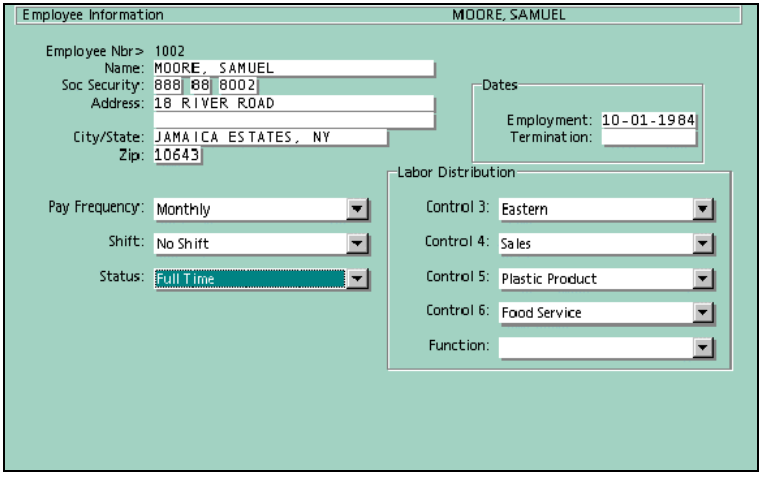
☞ *Refer to either the Payroll Administration documentation or the Human Resource Management documentation for more information on how to add employees.*

Understanding employee status

If your Time and Attendance Administration is integrated with another Cyborg Administration, you need to select an employee status on the Employee Information form (EE2SCR) in order for the Time Entry Validation/Creation form (TMCARD) to generate time entries from paid absences.



If you are a standalone Time and Attendance user, you will use the Employee Information form (EX-SCR) to select the employee status.



Paid absences are defined on the Absence Tables records. Employees are tied to the Absence Table records through the Status text box on the Employee Information form (EX-SCR). The valid entries for these text boxes are contained in Status Code option lists (PE049).

Note: *This text box should not be confused with the Human Resource Resulting Employee Status.*

☞ *Refer to* **Tracking Employee Absences** *(on page 233) for more information on paid absences.*

Understanding earnings codes (HEDs)

Cyborg uses the acronym HED to refer to Hours, Earnings, and Deductions. Each HED represents hours and pay of a certain type. HEDs are established on the Company Earnings Code Definition form for each type of earnings category that could be paid by the payroll department. Time and Attendance Administration uses only the earnings HEDs to create time entries.

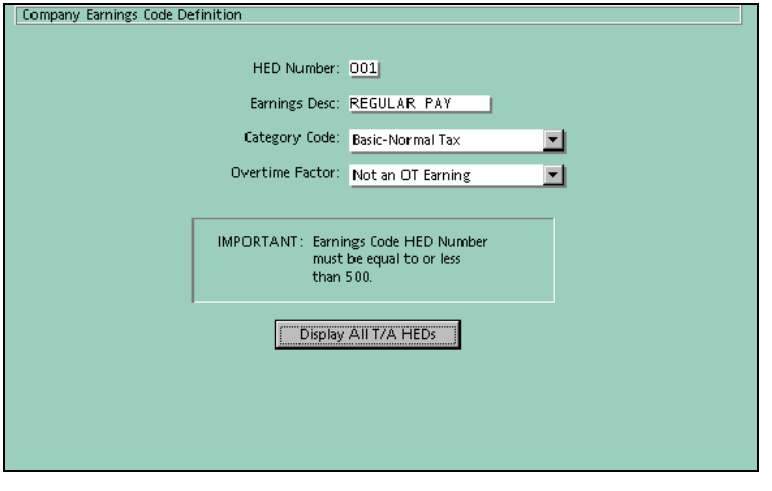
For example, you would normally have the following types of HEDs:

- Regular Pay
- Overtime Pay
- Shift Premiums
- Paid time off, such as vacation, sick pay and so forth

Each HED is identified by a three-digit HED number. The following are the earnings HEDs delivered with the system.

- 001 Regular Pay
- 003 Overtime Pay

Note: *The HED number must be the same or be tied to the number or ID used by your payroll department.*

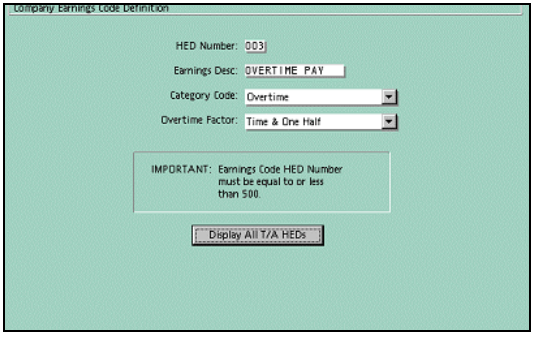


Overtime Factor

This text box is used to define the method used to create overtime hours on a time entry.

The options are defined in option list TN19. The valid options are:

Options	Description	Options	Description
#	None	5	Double and One Half
1	Half Time	6	Triple Time
2	Straight Time	7	Basic Pay and Overtime Hours
3	Time and One Half	8	Time and three quarters
4	Double Time	0	Not an Overtime Earning



Suppose an employee is paid $10.00 per hour and receive overtime after working 8 hours in one day. If the employee works 12 hours in one day those hours would be calculated using the overtime factor 'Half Time'.

	Regular Hours	Overtime Hours	HED	Amount Paid
	8.00		001	80.00
		4.00	003	20.00
	4.00		001	40.00
Totals	12.00	4.00		140.00

☞ *Refer to* **Time and Attendance Examples** *(on page 415) for an example of Overtime calculations.*

Apply the Concept
What overtime factors will you use in your organization?

Badge types

Time and Attendance Administration can be set up to process clock transactions from different types of badge readers. The type of badge your organization uses is determined by your third party badge reader software.

☞ *Refer to* **Setting Up and Maintaining Employee Badge Details** *(on page 185) for information on assigning employees to badges.*

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Adding a company to the system

To add a new company to Time and Attendance Administration, you must use the Set Up A New Company form (AA-NEW).

Note: *When the system processes the new company data, it creates some basic records, default forms, and reports.*

Note: *This form only accepts new organization values.*

1. Access the Set Up A New Company form (AA-NEW)

Access this form by making the following selection from the navigator:

Component: Development Tools
Process: Employee Database Utilities
Task: Add a New Organization

For practice, access the Set Up A New Company form (AA-NEW).

2. Enter a New Organization

Enter a six-character Organization number to identify the company.

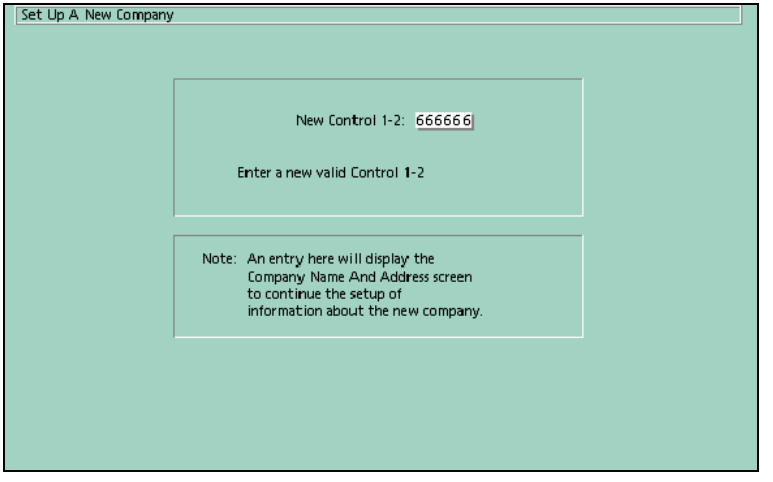
For practice, type '666666'.

3. Click Save or press Enter

The new Organization is saved, and the Company Name And Address form (AA-SCR) is displayed

For practice, press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- **Defining Organizations**

For more information on defining an Organization.

Adding a company name and address

This form is used to identify a company in more detail. It must contain the legal name and address of the organization. It is also used to further define company Organization Levels. Descriptions of Organization Levels 3 through 6 are entered on this form.

1. Access the Company Name and Address form (AA-SCR)

This form is automatically displayed after you have entered, and saved, a new Organization on the Set Up A New Company form (AA-NEW).

Note: If you need to access this form directly you must select:

Component: Development Tools
Process: Employee Database Utilities
Task: Maintain Organization Name

For practice, access the Set Up A New Company form (AA-NEW).

2. Enter a Organization Level 1 Name

Enter the name of the Organization Level 1. This is used to specify the organization's title, which will appear on the first line of all reports.

For practice, type 'ACME TIME AND ATTENDANCE'.

3. Enter a Organization Level 2 Name

Enter the name of the Organization Level 2. This is used to specify the division plant or company name, which will appear on the second line of all reports.

For practice, type 'PRODUCTION CTL 1-2'.

4. Enter an Address

Enter the address of the organization in the two address text boxes.

For practice, on the first line type '1142 N. RUSH STREET'. On the second line type 'COMMERCE PLAZA'.

5. Enter the City/State

Enter the name of the city or state in which the organization is located.

For practice, type 'CHICAGO, IL'.

6. Enter ZIP Code

Enter the ZIP/area code in which the organization is located.

For practice, type '60606'.

7. Enter a Organization Level 1 description

Enter an up to 12-character alphanumeric description of the Organization Level 1. This provides the system with a description of the highest organizational level. This description appears on reports next to the code for this level.

For practice, type 'CORPORATION'.

8. Enter a Organization Level 2 description

Enter an up to 12-character alphanumeric description of the Organization Level 2. This provides the system with a description of the second organizational level. This description appears on reports next to the code for this level.

For practice, type 'DIVISION'.

9. Enter a Organization Level 3 description

Enter an up to 12-character alphanumeric description of the Organization Level 3. This provides the system with a description of the third organizational level. This description appears on reports next to the code for this level.

For practice, type 'REGION'.

10. Enter a Organization Level 4 description

Enter an up to 12-character alphanumeric description of the Organization Level 4. This provides the system with a description of the fourth organizational level. This description appears on reports next to the code for this level.

For practice, type 'DEPARTMENT'.

11. Enter a Organization Level 5 description

Enter an up to 12-character alphanumeric description of the Organization Level 5. This provides the system with a description of the fifth organizational level. This description appears on reports next to the code for this level.

For practice, type 'SECTION'.

12. Enter a Organization Level 6 description

Enter an up to 12-character alphanumeric description of the Organization Level 6. This provides the system with a description of the sixth organizational level. This description appears on reports next to the code for this level.

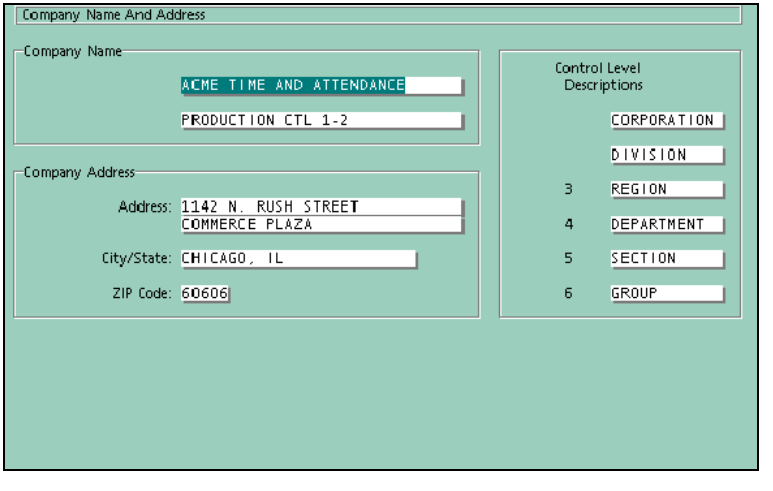
For practice, type 'GROUP'.

13. Click Save or press Enter

The Company Name and Address form (AA-SCR) is saved.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Setting up company options (standalone users only) ***(on page 41)***

For an explanation of the additional company details you need to define.

Setting up company options (standalone users only)

In order to use Time and Attendance Administration, you must define additional options, such as which badge reader type your company uses.

The steps in this task are for standalone Time and Attendance users. If your Time and Attendance system is integrated with Payroll Administration, you should refer to Payroll Administration documentation for information on how to set up this form.

The Guided Practice for the remaining tasks will use the Organization Level '999999'.

1. Access the Employee Selection dialog box

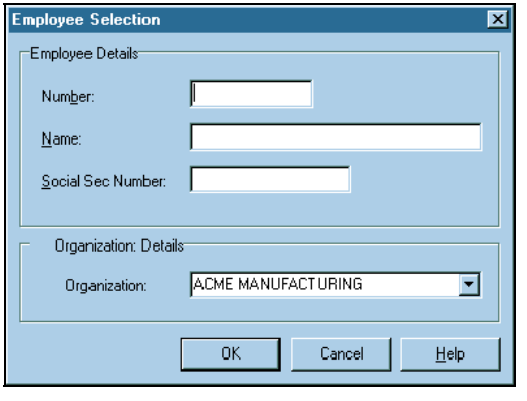
Access the Employee Selection dialog box using the Employee button on the toolbar.

For practice, click on the Employee button on the toolbar.

2. Select an Organization

Select an Organization number in the Organization options list.

For practice, select 'ACME MANUFACTURING'.



3. Click OK or press Enter

To select the Organization you must save your selection.

For practice, click OK or press Enter.

4. Access the Company options form (AF-SCR)

Access this form by making the following selection from the navigator:

Component: Payroll Setup Processing
Process: Organization Setup
Task: Organization Options

For practice, access the Company options form (AF-SCR).

5. Click on the More Options button

Click on the More Options button to access the second page of this form.

For practice, click on the More Options button.

6. Select a Country Location

In the Country text box, select which country your organization is located in. The selection you make in this text box causes the system to look for option list versions for that specific country.

For practice, select which country your organization is located in.

7. Select a Mag Stripe/Bar Cde option

Select which type of badge reader your organization will use. The options are:

- Bar Code
- Magnetic Stripe

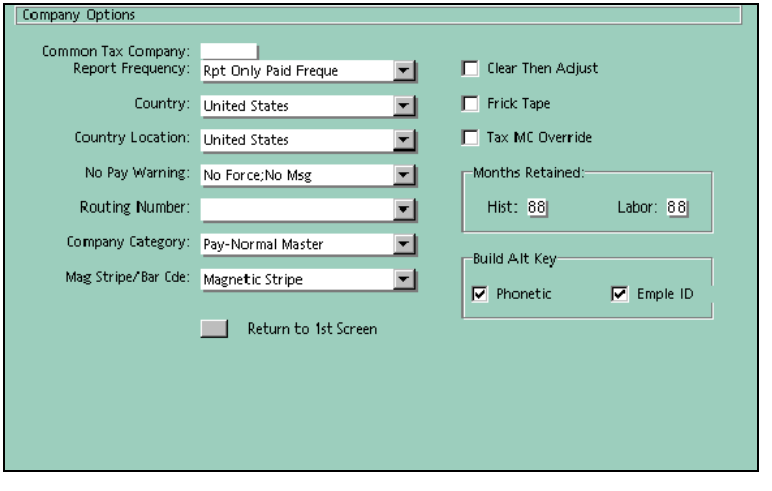
For practice, select 'Magnetic Stripe'.

8. Click Save or press Enter

To save your selection click Save or press Enter.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- **Badge types** ***(on page 37)***

For an explanation of the different badge types.

Setting up employees (standalone users only)

If you are a standalone Time and Attendance user, you will need to add employees to your system using the Employee Information form (EF-SCR).

If your Time and Attendance Administration is integrated with another Cyborg component, please refer to the documentation for that component for information on how to add employees to your system.

Note: *For the remaining tasks in this section, and for the rest of the Time and Attendance documentation, you will use the default test Organization (999999), which is supplied with your system.*

1. Access the Employee Information form (EF-SCR)

Access this form by making the following selection from the navigator:

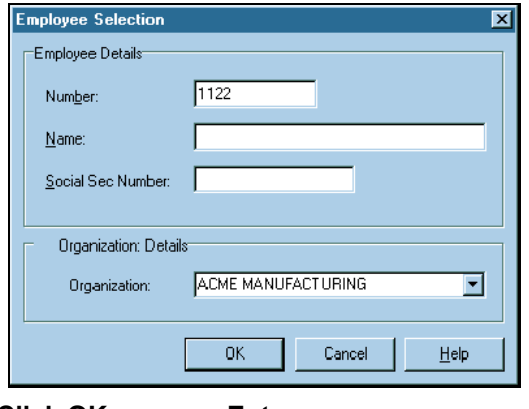
Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Employee Information

For practice, access the Employee Information form (EF-SCR).

2. Enter an employee number

On the Enter a Valid Organization/Employee form, enter an employee number of the employee you want to assign to a Schedule Master table.

For practice, type '1122' in the Number text box.

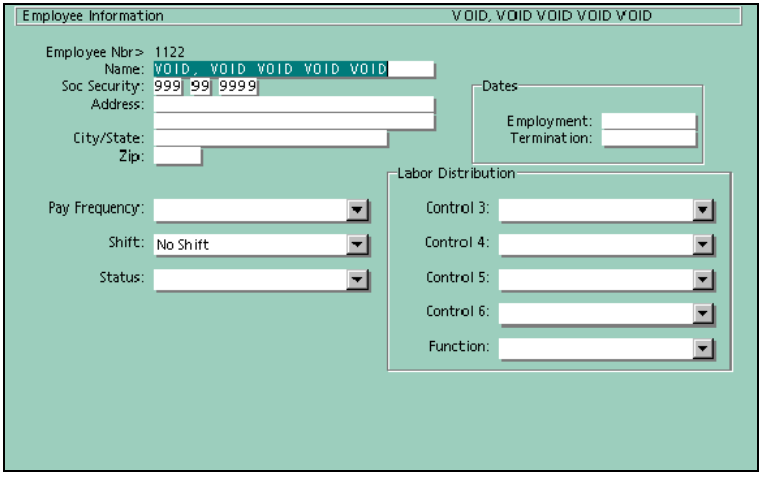


3. Click OK or press Enter

Click OK to display the Employee Information form (EF-SCR). The new employee number is displayed in the Employee Number text box.

For practice, click OK or press Enter.

Note: *As you are creating a new employee, the system draws your attention to this by displaying 'VOID VOID VOID VOID' on in the name text box and in the form heading. When you have completed this form and saved it, 'VOID VOID VOID VOID' will be replaced by the employee's name.*



4. Enter a Name

Enter the name of the employee in the following format:

Last name, first name

Note: *You can use up to thirty characters, and there must be a comma and a space between last and first name.*

For practice, type 'FOX, MATTHEW'.

5. Enter a Soc Security number

Enter the employee's nine-character social security number.

For practice, type '222-33-4444'.

6. Enter an Address

Enter the employee's address, in the two address text boxes.

For practice, in the first line type '2314 W Milwaukee Av'. In the second text box type 'Apt 807'.

7. Enter City/State

Enter the name of the city and state in which the employee lives.

For practice, type 'CHICAGO, IL'.

8. Enter the ZIP Code of the employee's address

Enter the ZIP code of the employee's address.

For practice, type '60614'.

9. Select a Pay Frequency

Select the employee's pay frequency.

Note: If you leave this text box blank when adding a new employee, the system uses the default setting. The default setting is defined in the Default Pay Frequency text box, on the Company Options form (AF-SCR).

For practice, select 'Weekly'.

10. Select a Shift pattern

Select a shift pattern.

Note: Optionally, the selection in this list box can access the appropriate shift differential HED for calculating the Shift Premium amount.

For practice, select 'No shift'.

11. Select a status

Select an employment status for the employee you are defining. The Time Entry Validation/Creation form (TMCARD) uses the employee status to generate time entries from paid absences.

The options are:

- Full Time
- Part Time
- Temporary
- None

Note: If your Time and Attendance Administration is integrated with another Cyborg component, you must define an employee's status in the Employee Information form (EF-SCR).

For practice, select 'Full Time'.

12. Enter an Employment date

Enter the date the employee started working for your organization. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '12-31-1997'.

13. Select a Organization Level 3

Select the Organization Level 3 to which the employee belongs.

For practice, select 'Midwest'.

14. Select a Organization Level 4

Select the Organization Level 4 to which the employee belongs.

For practice, select 'Manufacturing'.

15. Select a Organization Level 5

Select the Organization Level 5 to which the employee belongs.

For practice, select 'Paper Products'.

16. Select a Organization Level 6

Select the Organization Level 6 to which the employee belongs.

For practice, select 'Wholesale'.

17. Select a Function

Select the Function to which you want to charge the employee.

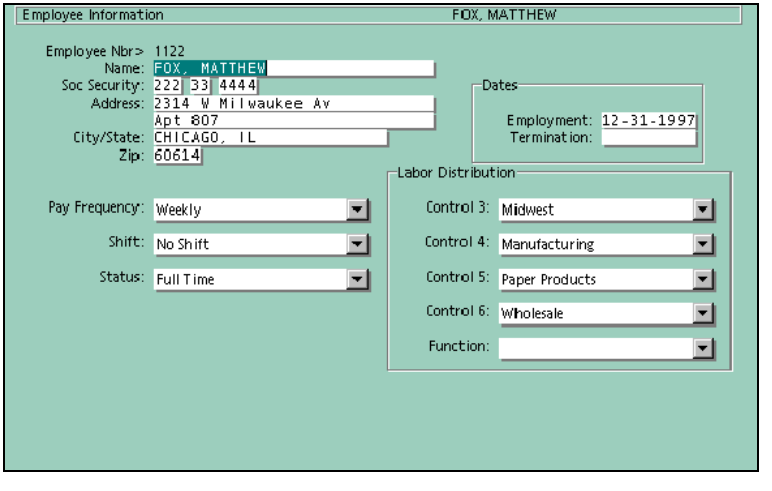
For practice, select 'None'.

18. Click Save or press Enter

The Employee Information form is saved and the new employee is added to the system.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Assigning organization levels ***(on page 29)***

For an explanation Organization Levels.

- Understanding employee status ***(on page 33)***

For an explanation of Employee Status.

■ **Setting up employee statuses (integrated users only)** ***(on page 48)***
For an explanation on how to define additional details on employee status.

Setting up employee statuses (integrated users only)

The Employee Information form (EF-SCR) is for Time and Attendance users whose system is integrated with another Cyborg component. This form allows you to specify additional information regarding the employee's employment status.

The Time Entry Validation/Creation form (TMCARD) uses the employee status to generate time entries from paid absences.

1. Access the Employee Information form (EF-SCR)

Access this form by making the following selection from the navigator:

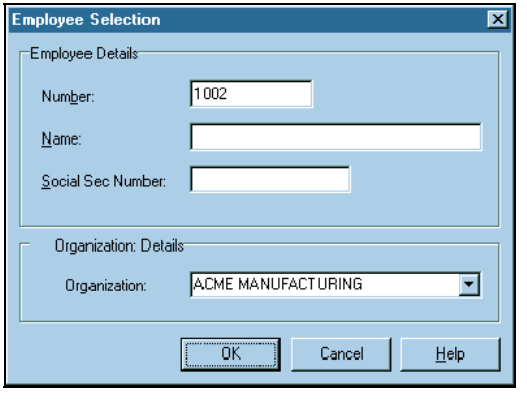
Component: Employee Payroll
Process: Maintain Employee Payroll Details
Task: Status, Job Category for Payroll Only

For practice, access this form.

2. Enter an Employee Number

On the Employee Selection form, enter an Employee Number.

For practice, type '1002' in the Number text box.



3. Click OK or press Enter

The Employee Information form is displayed.

For practice, click OK or press Enter.

4. Select a Status

Select an employment status for the employee you are defining. The Time Entry Validation/Creation form (TMCARD) uses the employee status to generate time entries from paid absences.

The options are:

- Full Time
- Part Time
- Temporary
- None

For practice, select 'Full Time'.

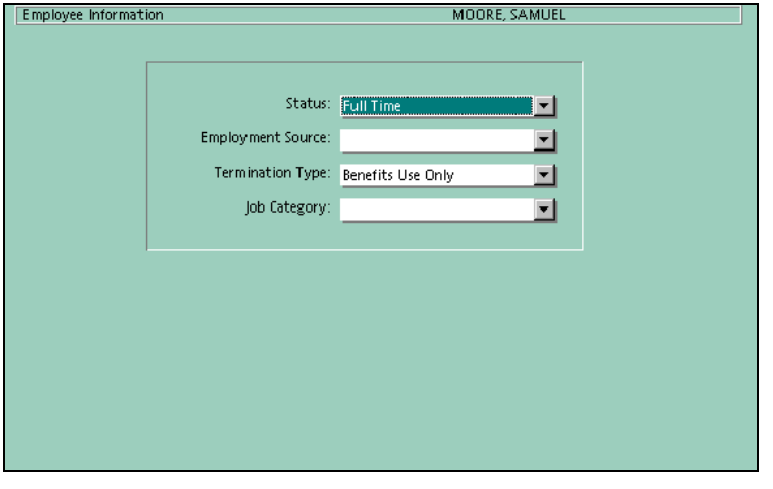
Note: The remaining three text boxes are not used by Time and Attendance Administration.

5. Click Save or press Enter

To save the Employee Information form (EF-SCR) click Save or press Enter.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Understanding employee status ***(on page 33)***

For an explanation of Employee Status.

- Setting up employees (standalone users only) ***(on page 44)***

For an explanation on how to add employees to Time and Attendance Administration.

Setting up company earnings codes (HEDs)

If you are a standalone Time and Attendance user, the Company Earnings Code Definition form (A8TSCR) must be used to establish HEDs.

This form is used to establish earnings codes (HEDs) that are required for each category of payment that could be paid to an employee.

The time entries created by the Time and Attendance System requires a three-digit earning code HED (numbered 001-500) that is associated with all hours reported.

Note: If your Time and Attendance Administration is integrated with Cyborg's Payroll Administration, you must use the Company Earnings and Deductions form (A8-SCR). Refer to Payroll Administration documentation for more information on this form.

Note: The 'Delete This Entry' navigator option is not available for the Company Earnings Code Definition form (A8TSCR). You need to give careful consideration to your HED setup before using this form.

1. Access the Company Earnings Code Definition form (A8TSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Setup Company Earn HEDs

For practice, access this form.

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a HED number

Enter a number for the HED you want to define. For Time and Attendance Administration, you are defining an earnings HED, numbered between 004 and 500.

If you create a new company, the system will create three default HEDs. These are:

- 001 Regular Pay
- 002 Future Raise
- 003 Overtime Pay

For practice, type '024'.

4. Enter an Earnings Desc

Enter a description of the earnings HED you are defining.

For practice, type '4TH SHIFT PREM'.

5. Select a Category Code

Select a Category Code for the new HED. HEDs must be assigned to a Category Code.

For practice, select 'Shift-Normal Tax'.

6. Select an Overtime Factor

If the HED you are defining is an overtime earning, you must select what overtime factor will be used for this particular overtime earning. For example, the overtime factor could be 'Triple time', or 'Time and one half'.

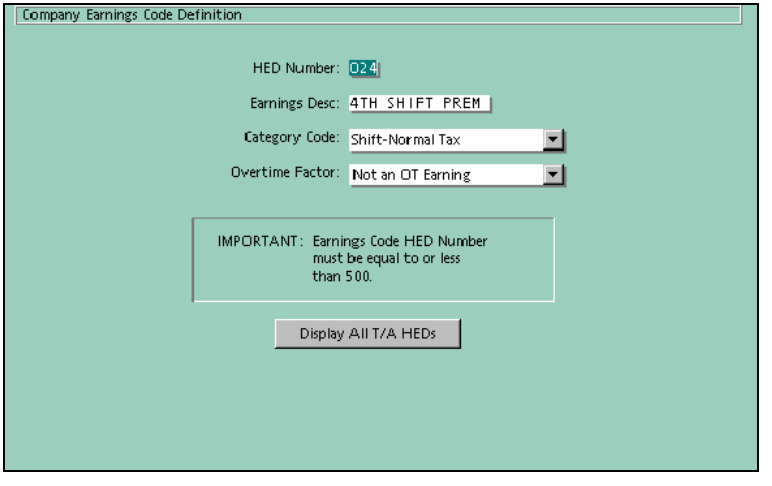
For practice, select 'Not an OT Earning'.

7. Click Save or press Enter

To save the HED you have defined, click Save or press Enter.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Understanding earnings codes (HEDs) ***(on page 35)***

For an explanation of earnings codes (HEDs).

- Setting up company earnings codes (HEDs) ***(on page 49)***

For an explanation of how to set up earnings codes (HEDs).

Viewing and updating company HED information

The Company HED Inquiry form (HEDSCR) allows you to display all company-level earnings codes set up for a selected Organization. This is an inquiry-only form.

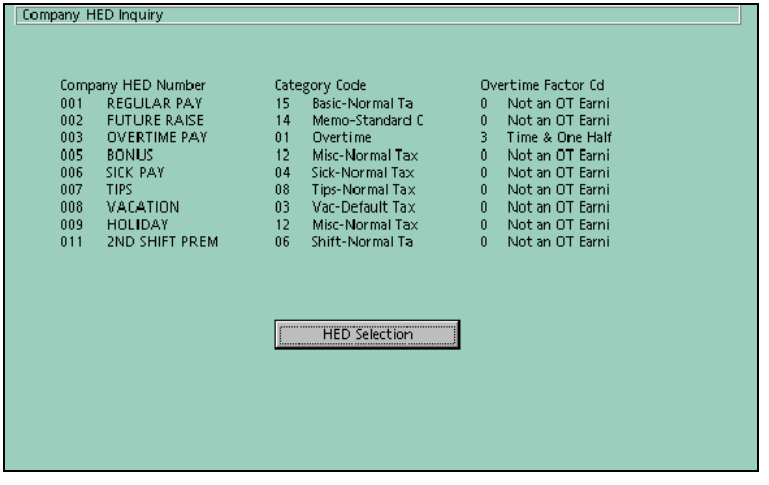
Note: If your Time and Attendance Administration is integrated with Payroll Administration, you must use the Company Earnings and Deductions form (A8-SCR).

1. Access the Company HED Inquiry form (HEDSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Earning HED Inquiry

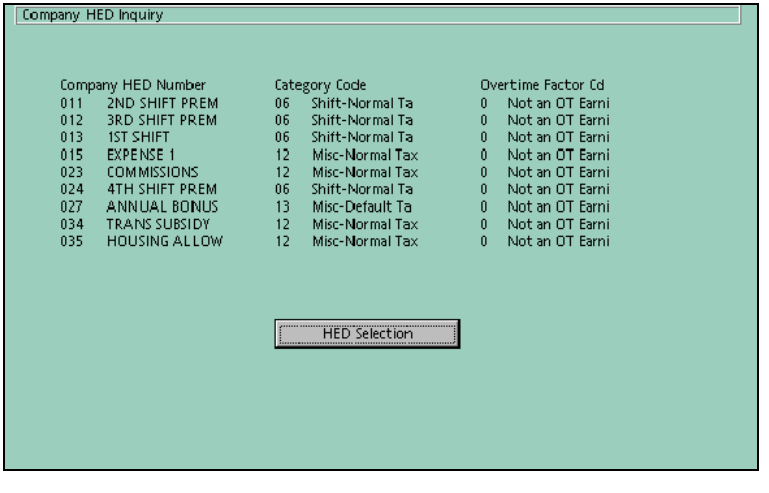
For practice, access the this form:



2. Click Save or press Enter

The Company HED Inquiry form (HEDSCR) is a multi-page form. To view the next page, click Save or press Enter.

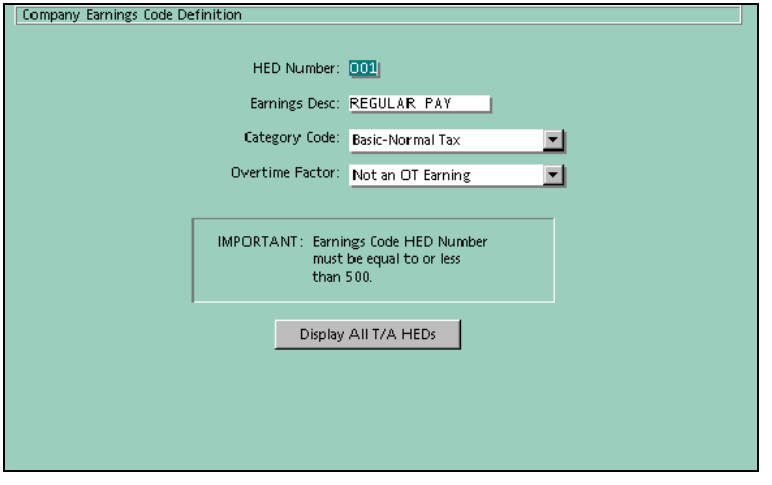
For practice, click Save or press Enter.



3. Click on HED Selection

To edit a particular HED, click on the HED Selection button. The Company Earnings Code Definition form (A8TSCR) is displayed. The first HED '001 REGULAR PAY' is displayed.

For practice, click on the HED Selection button.



4. Select an HED

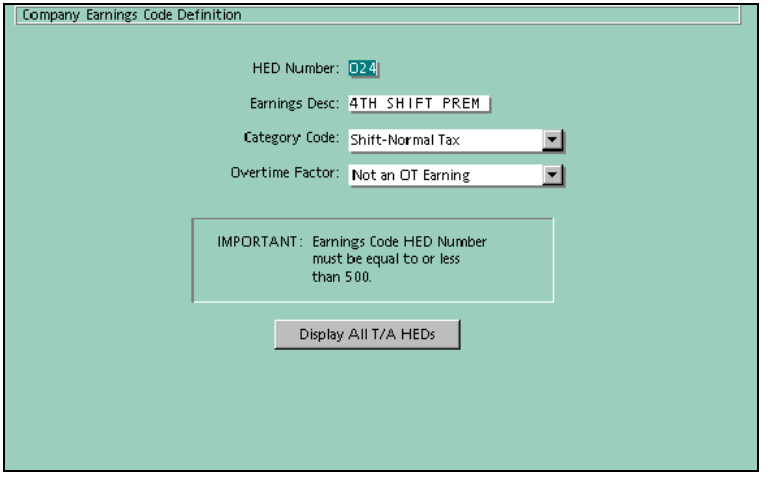
Select a different HED using the Selections button on the toolbar.

Select an HED by double-clicking on an entry.

For practice, double click on HED '024'.

5. Edit the details of the particular HED

Amend the text boxes on this form, and save your alterations by clicking OK or pressing Enter.



See also:

- Understanding earnings codes (HEDs) ***(on page 35)***

For an explanation of earnings codes (HEDs).

- Setting up company earnings codes (HEDs) ***(on page 49)***

For an explanation of how to set up earnings codes (HEDs).

Review of Questions Answered

1. What information is needed to establish a company?

2. What are Organization Levels and how are they used?

3. What is an employee status used for?

4. Which earning codes (HEDs) are supplied with the system?

CHAPTER 4

Implementing Time and Attendance Administration

In This Chapter

Introduction

Before using the many features of Time and Attendance Administration, you must make a number of decisions about how you are going to implement it. The tasks and concepts you need to understand are discussed in this section.

Tasks

The following tasks are discussed in this section:

- Creating a new Calendar Routine
- Setting up your organization's holidays
- Establishing holiday pay rules
- Setting up daily pay rules
- Setting up earnings codes
- Deleting a record in the Earnings Code table
- Setting up Shift Premiums (optional)
- Deleting a Shift Premium table

Prerequisites

Before you can begin to implement Time and Attendance Administration, all of the following tasks must have been completed.

Implementation Plan

Before you can create the Time and Attendance tables, you need to establish an Implementation Plan for your organization. This plan should have been completed when Time and Attendance Administration was installed in your organization.

In this plan, you should have identified your organization's Time and Attendance rules. Having established these rules, you can create the Time and Attendance tables that will store this information.

Organization details

Before any data can be entered, you must ensure that your organization details have been set up on The Solution Series.

☞ *Refer to* **Getting Started with Time and Attendance** *(on page 23) for more information.*

If your organization has already implemented the basic functionality of the Human Resources Management Administration or Payroll Administration, these items will already be defined.

Questions answered

The following questions are answered in this section:

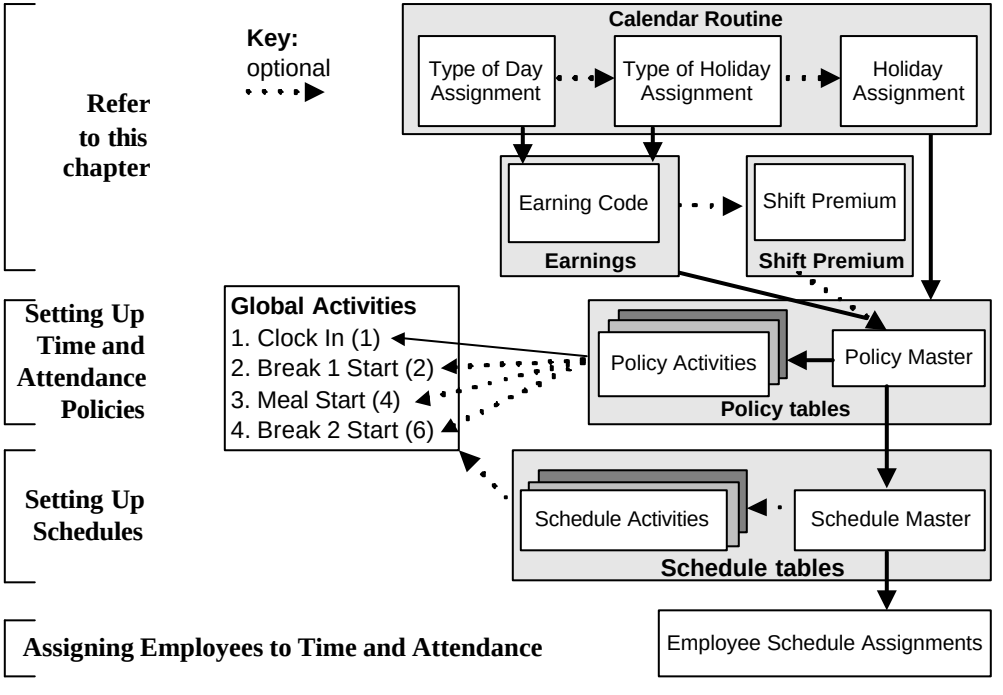
1. What is a Calendar Routine?
2. How do you define payment rules for working holidays?
3. How do you define payment rules for working on non-working days?
4. How do you define payment rules for working days?

5. What is the relationship between Type of Day codes and HEDs?
6. How are Shift Premiums used?
7. What is the relationship between Calendar Routines, Policies, and Schedules?

Time and Attendance rules

During the implementation of Time and Attendance Administration, you identified your organization's Time and Attendance rules. To use Time and Attendance Administration, you populate its tables with these rules.

The following diagram displays Time and Attendance Administration tables and the relationships among them. The tables should be completed in the order shown, working from top to bottom. For a more detailed explanation of each table, refer to the section indicated in the diagram.



Apply the Concept

Describe your organization's current method of enforcing attendance rules, and indicate how Time and Attendance Administration tables can be used to automate this.

Calendar Routines

To create your Time and Attendance rules, you first need to create the Calendar Routines that reflect the requirements of your organization.

A Calendar Routine is used to define payment rules for groups of employees in your organization. The Calendar Routine establishes:

- Your organization's statutory and non-statutory holidays.
- Payment rules for:
  - Regular working days—typically Monday through Friday
  - Special working days—typically Saturday and Sunday
  - Employees who work on company holidays

By establishing these rules you are able to control how payments are calculated and how time entries are generated

Establishing a new Calendar Routine

A Calendar Routine is a name used to collectively describe the following:

- TNCLxx program
- Holiday Assignment table
- Type Of Holiday Assignment table
- Type Of Day Assignment table

Note: *Each Calendar Routine is identified by a unique two-character identifier.*

Time and Attendance Administration is supplied with two Calendar Routines, '01' and '99'. You can use these or create your own.

Before you can create your own Calendar Routine, you must copy the source code from the existing Calendar Routine '01'. The source code is contained in a program called TNCL01.

Note: *The last two digits of the program name (TNCL01) are the two-character Calendar Routine identifier, which is used in the Calendar Routine tables.*

For example, if you want to create a new Calendar Routine called 89, you must create a new file called TNCL89. This is done by copying the TNCL01 program to TNCL89, and then modifying the code to check for 'TNCL89' instead of 'TNCL01'.

When you have created the new source code for your Calendar Routine, you can then establish your organization's Time and Attendance rules, using these tables:

- Holiday Assignment table
- Type Of Holiday Assignment table
- Type Of Day Assignment table

Holiday Assignment table

The Holiday Assignment table (HOLIDAY) is used to define global holidays for employees, or groups of employees, in your organization. Global holidays are defined as

statutory holidays and any holidays to which groups of employees may be entitled, such as union days. The table invokes payment rules for employees who work on holidays.

Note: *The Holiday Assignment table (HOLIDAY) is not used to define employee vacation entitlement.*

You must create separate Holiday Assignment tables to reflect the different holiday entitlements that may exist within your organization.

For example, suppose an organization has eight statutory holidays to which all employees who work in the main location are entitled. You would create a Holiday Assignment table for those dates.

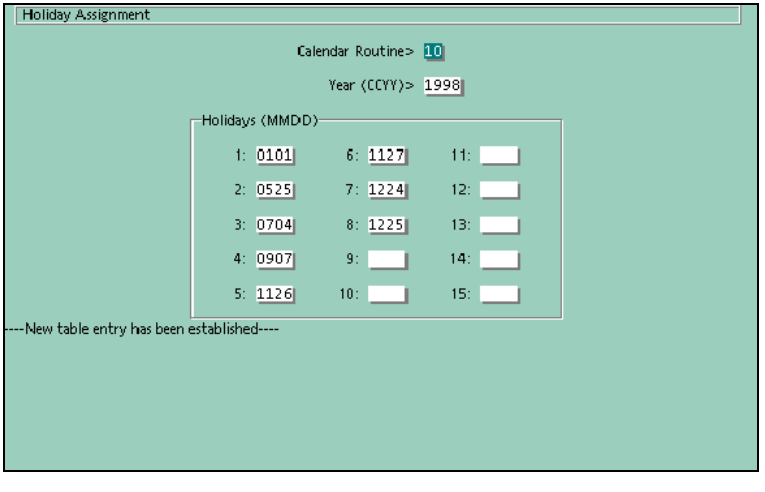
In addition, the group of employees who work in this location also belong to a union that has negotiated additional paid holidays for its members. For this group of employees you would need to create a separate Holiday Assignment table (HOLIDAY) in which you would set up the eight statutory holidays and the additional union holidays.

There are also employees who work in other parts of the country and in other countries. You would need to create additional Holiday Assignment tables to reflect the statutory holidays that exist in those locations.

In the Holiday Assignment table (HOLIDAY), you can enter up to 15 holidays. These may be entered in any order. For example July 4, does not have to be entered before December 25.

Note: *You need to create a Holiday Assignment table only if employees in your organization will work on days that should be part of their holiday entitlement. If your organization does not allow employees to work on holidays you do not need to create this table. If you do create this table for a group of employees you must also create a Type Of Holiday Assignment table.*

An example of a Holiday Assignment table (HOLIDAY) is shown below. This table is linked to the other tables that form a Calendar Routine by referencing a unique two-character Calendar Routine identifier.



Holiday pay

The Type Of Holiday Assignment table (TYPEHL) is used to define what payment an employee will receive if he or she works on a day that has been defined as a holiday in the Holiday Assignment table (HOLIDAY).

Note: *Before you can create this table, you must create a Holiday Assignment table. You only need to create a Type Of Holiday Assignment table (TYPEHL) if employees in your organization will work on days that should be part of their holiday entitlement. If your organization does not allow employees to work on holidays, you do not need to create a Type of Holiday Assignment table (TYPEHL).*

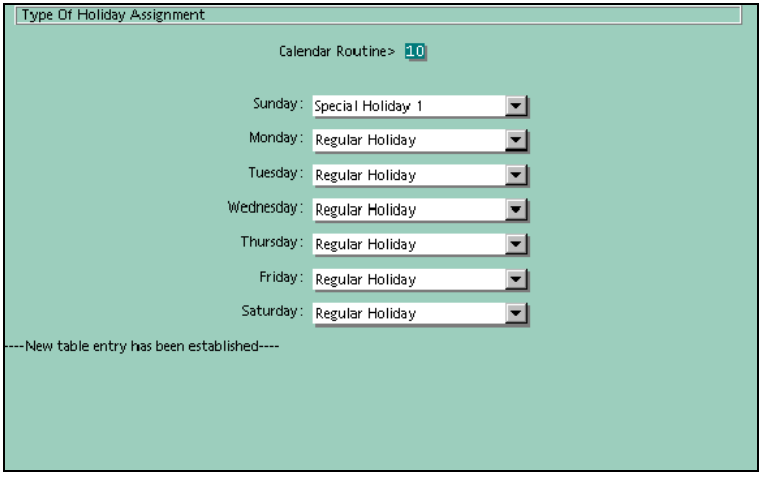
To determine what payment an employee would receive, you must select a Type of Day code on the Type of Holiday Assignment form (TYPEHL) for each day of the week. You can select a different Type of Day code if you need to distinguish days that have different payment rules.

For example, for Monday through Friday you select 'Regular Holiday' as the Type of Day code. You select the 'Special Holiday 1' as the Type of Day code for Saturday and Sunday. If an employee works on a Saturday or Sunday, he or she would receive a different payment.

After you select your Type of Day codes you need to associate these codes with earnings codes (HEDs) in the Earnings Code table.

An example of a Type Of Holiday Assignment table (TYPEHL) is shown below.

Note: *The Type Of Holiday Assignment table (TYPEHL) is linked to the other tables that form a Calendar Routine, by referencing a unique two-character Calendar Routine identifier.*



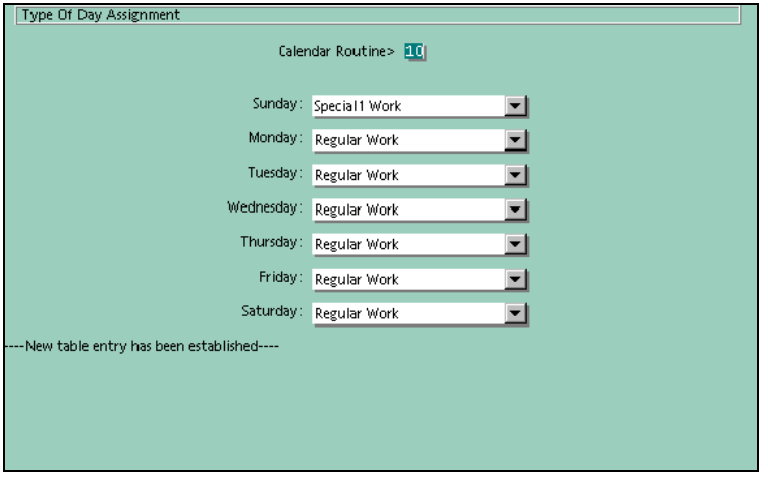
Payment types

The Type Of Day Assignment table (TYPEDA) is used to determine what type of payment is made when an employee works on a particular working (non-holiday) day. You must select a Type of Day code for each day of the week.

When you have completed this table, you must associate the Type of Day codes you have used with an earnings code (HED) by using the Earnings Code table (EC-SCR).

In the following example of a Type Of Day Assignment table (TYPEDA), Monday through to Saturday are considered regular workdays. Sunday is considered a special workday and is assigned to Special 1 Work

Note: *This table is linked to the other tables that form a Calendar Routine, by referencing a unique two-character Calendar Routine identifier.*



Relationship between calendar days and payments

After you create your Calendar Routines you need to create Earnings Code tables for your Type of Day codes.

The Type of Day codes are associated with earnings codes (HEDs). The working and non-working days are defined in the following two tables:

- Type Of Holiday Assignment table (TYPEHL)
- Type Of Day Assignment table (TYPEDA)

When you have created these two tables, your Type of Day codes are associated with an earnings code (HED), by using the Earnings Code table (EC-SCR).

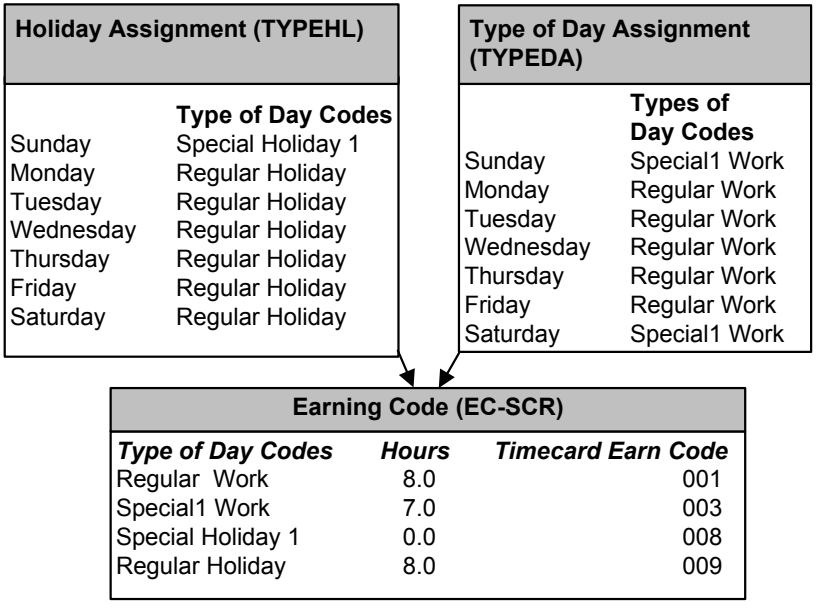
On the Earnings Code table (EC-SCR), the Type of Day codes are contained in the Option List TN02. This Option List contains the following codes, which are used in the two tables as indicated:

Type Of Holiday Assignment table	Code	Type Of Day Assignment table	Code
Special Holiday 1	A	Regular Work	1
Special Holiday 2	B	Regular Non-Work	2
Special Holiday 3	C	Special1 Work	3
Special Holiday 4	D	Special1 Non-Work	4
Special Holiday 5	E	Special2 Work	5
Special Holiday 6	F	Special2 Non-Work	6
Special Holiday 7	G		
Regular Holiday	H		

Earnings Code table

The Earnings Code table (EC-SCR) is used to associate the earnings codes (HEDs) with the different Type of Day codes you have established.

The following diagram shows the relationship between these two tables and the Earnings Code table (EC-SCR).



For each Type of Day code you have used, you must define:

- The number of hours worked that is associated with the Regular Pay HED (usually 001)
- The earnings code (HED) that is associated with the hours that exceed the Regular Pay HED

For example, for Type of Day code 'Special Holiday 1', zero hours worked are associated with the Regular Pay HED. All hours exceeding zero are associated with HED 008. Therefore, all hours worked for 'Special Holiday 1' are associated with HED 008.

Earnings Code table and time entries

When you create an Earnings Code table (EC-SCR), you must select one of the following codes in the Type option list:

- Daily
- Period

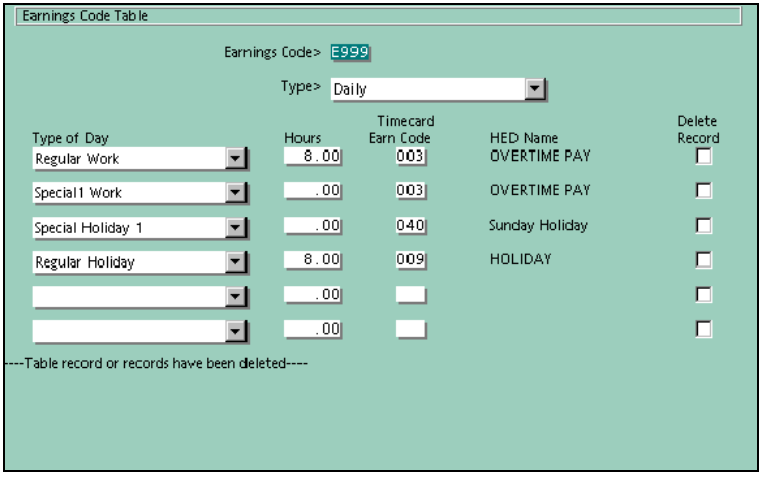
When time entries are created, this code is used by the Time Entry Validation/Creation program (TMCARD) to determine whether the hours in the table are to be checked against daily employee hour totals or pay period hour totals.

When you create time entries, the system follows these steps when processing the Earnings Code table (EC-SCR):

Daily table type

- Daily tables are checked for each employee for each date of clock transactions (rings). The Time Entry Validation/Creation program (TMCARD) checks the Calendar Routine to determine what Type of Day code is being processed.
- The Earnings Code table (EC-SCR) is checked to determine which HED is to be associated with time entry hours and how many hours to associate to that HED.
- The hours the employee worked for that day are accumulated. The number of hours up to the entry in the Hours text box, for the Type of Day code, are applied to the default HED (usually Regular Pay, HED 001) on the resulting time entry.
- The number of hours exceeding the entry in the Earnings Code Hours text box is applied to the HED listed in the Time Entry Earn Code text box.

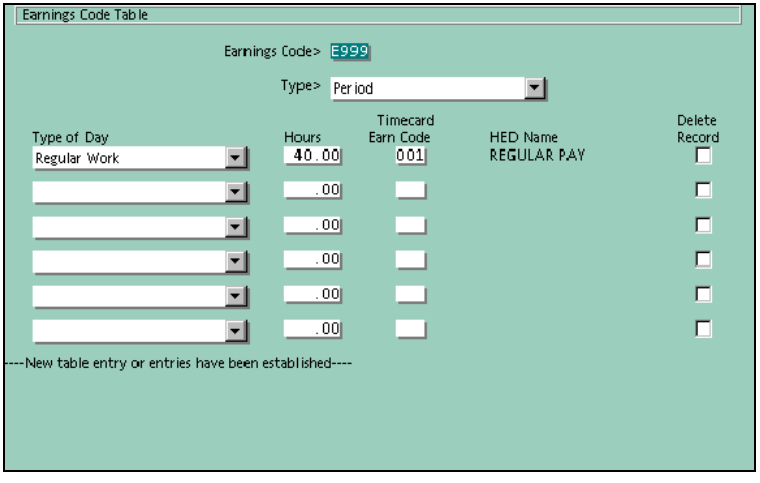
The following example shows an Earnings Code table (EC-SCR) with the Daily pay period selected:



Period table type

- Period tables are checked for each employee for each period's clock transactions (rings). Period tables are checked when running the Time Entry Creation program. The program checks the hours being accumulated towards the default HED (usually Regular PAY, HED 001).
- The Regular Pay hours the employee worked for the specified pay period (week, fortnight, month) are accumulated for each date within the specified pay period.
- The number of Regular Pay hours exceeding the entry in the Earnings Code Hours text box is subsequently applied to the HED listed in the Time Entry Earn Code text box.

The following example shows an Earnings Code table (EC-SCR) with the Period pay period selected:


Earnings Code Table
Earnings Code> E999
Type> Period
Type of Day
Hours
Timecard Earn Code
HED Name
Delete Record
Regular Work
40.00
001
REGULAR PAY
.00
.00
.00
.00
.00
----New table entry or entries have been established----

Shift Premiums payments

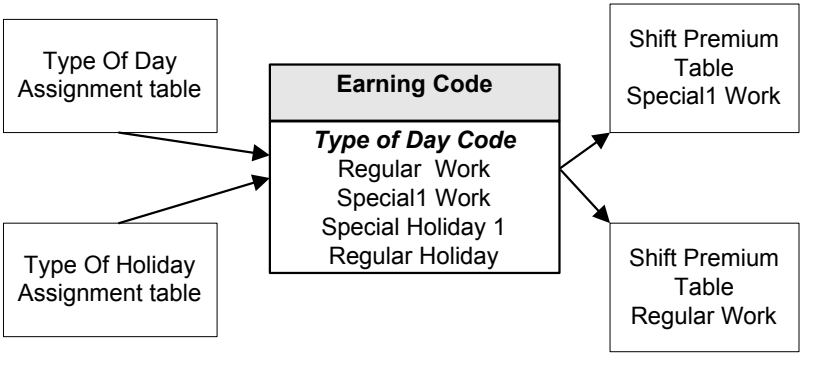
After you have established your Calendar Routines and earnings codes, you then need to decide if you will use Shift Premiums in your organization. A Shift Premium is a supplementary allowance that can be paid for working unsociable hours or for performing hazardous work. Shift Premiums are set up on the Shift Premium table (SP-SCR).

Note: *Shift Premiums are an optional Time and Attendance feature.*

You can track different Shift Premium hours for different time periods during the course of a day. You can define what Shift Premium an employee could receive for working a regular shift; you can also define a Shift Premium for employees who work overtime.

Shift Premiums and Type of Day codes

Shift premiums are associated with Type of Day codes. For each Type of Day code that requires a shift premium, you establish a Shift Premium table (SP-SCR).



Regular Shift Premium

The following example explains how Shift Premium hours can be tracked for the Type of Day code 'Regular Work'.

- You have created a Shift Premium table to track a Shift Premium for employees who work between 24:00 and 08:00
- Your organization's shift start times are Shift A—06:00, Shift B—14:00, and Shift C—22:00

Because these shift times do not match the time you entered on the Shift Premium table (24:00—08:00), the premium will be in effect only where the shift times overlap with the Shift Premium time period.

In this example, employee hours on Shift A would be generated with the Regular Shift Premium for the first two hours of their shift. Employee hours on Shift B would not generate any Shift Premium. Employee hours on Shift C would be generated with the Regular Shift Premium for the last six hours of their shift. The following table illustrates this example:

				Qualifying Hours (24:00—08:00)
Time	**Shift A**	**Shift B**	**Shift C**	**Regular Shift Premium**
06:00				
08:00				
10:00				
12:00				
14:00				
16:00				
18:00				
20:00				
22:00				
24:00				
02:00				
04:00				

Regular and Overtime Shift Premium

The Shift Premium table (SP-SCR) allows you to track Shift Premiums for employees' regular pay hours and overtime hours.

For example, an employee is working on a Regular day. He has completed Shift C (22:00 - 06:00) and worked the first two hours of Shift A. Because the employee is paid overtime after eight hours, and you have established an overtime Shift Premium, the employee will be entitled to two Shift Premiums:

- Regular shift premium for the regular hours worked
- Overtime shift premium for the overtime hours worked

			Qualifying Hours (24:00—08:00)	
Time	**Shift C**	**Shift A**	**Regular Shift Premium**	**Overtime Shift Premium**
22:00				
24:00				
02:00				
04:00				
06:00				

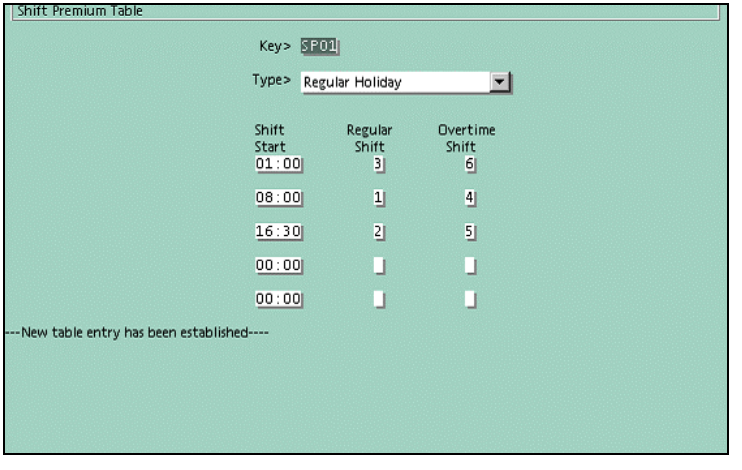
Shift Premiums and Time Entry Validation/Creation program

The Shift Premium table (SP-SCR) is used to establish Shift Premium codes. These codes identify the various shift premiums and are populated into the time entries generated by the Time Entry Validation/Creation form (TMCARD).

The Shift Premium codes are entered as one-digit numbers on the Shift Premium table (SP-SCR). These one-digit numbers can be assigned to HEDs.

☞ *Refer to Time and Attendance Examples for more information on assigning a HED to a Shift Premium code.*

When you establish a Shift Premium table (SP-SCR) you must define it using a three-character identifier known as a Key.



This example illustrates how a Shift Premium table (SP-SCR) is used when a time entry is generated. The Shift Premium table (SP-SCR) has been set up for a 'Regular Work' day. Shift Premiums are payable during the following time intervals:

- 07:00—15:00
- 15:00—23:00
- 23:00—07:00

These rules are shown in the above example of the Shift Premium table (SP-SCR).

For example, an employee works from 06:30 to 16:00. According to the employee's Earning Code table (EC-SCR), the first eight hours for a Regular Work day are regular pay. Any hours that the employee works in excess of eight hours are tracked as overtime.

During the hours the employee works, different Shift Premiums are payable. The following table illustrates the Shift Premiums the employee would receive:

Breakdown of employee hours worked	Shift Premium time intervals	Resulting Time Entry hours	Resulting Time Entry Type of Pay - Regular or Overtime	Resulting Time Entry Shift Premium Code used
06:30—07:00	23:00—07:00	0.50	Regular (HED 001)	3
07:00—14:30 **(Eight Hours Worked)**	07:00—15:00	7.50	Regular (HED 001)	1
14:30—15:00	07:00—15:00	0.50	Overtime (HED 003)	3
15:00—16:00	15:00—23:00	1.00	Overtime (HED 003)	1

Apply the Concept

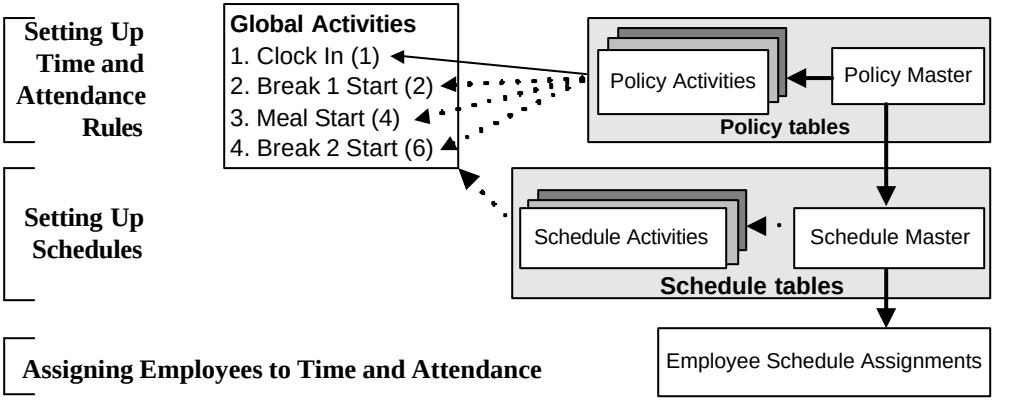
Identify which crews in your organization are currently receiving Shift Premium allowances. Determine which hours during these shifts will be eligible for shift premium payments.

Policy and Schedule tables - an overview

When you have created the tables detailed in this section, you will then be able to create your Policy and Schedule tables.

Time and Attendance Policy (PT2SCR) and Schedule (ST2SCR) tables contain your organization's rules relating to working time procedures, such as clocking in and out, docking for lateness, and overtime.

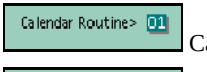
A brief overview of the Policy (PT2SCR) and Schedule (ST2SCR) tables is given in this section. For a more detailed explanation of each table, refer to the section indicated in the diagram.



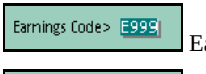
Policy Master table

Policy tables, which are the highest-level tables, are used to record the generic (or master) rules for the company or for a group of employees. Each policy consists of a Policy Master table (PT1SCR) and one or more Policy Activities table (PT2SCR).

When you create a Calendar Routine, an Earnings Code table (EC-SCR), and a Shift Premium table (SP-SCR), you give each of them a unique table identifier:



Calendar Routine



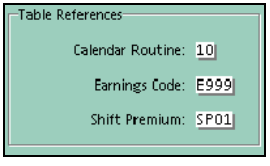
Earnings Code

Shift Premium

To associate the Policy Master table (PT1SCR) with the values held in these tables, you enter their unique identifiers.

When Time and Attendance Administration processes the Policy Master table (PT1SCR), it uses these identifiers to reference the data contained in these tables.

The following diagram shows the group box on the Policy Master table (PT1SCR) where you enter the unique identifiers for each table:



Policy Number and Sub-Policy Number

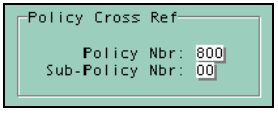
The Policy Master table (PT1SCR) has its own unique identifiers, a Policy Number and a Sub-Policy Number. These numbers are referenced by the Policy Activities table (PT2SCR) and Schedule tables.

☞ *Refer to* **Setting Up Time and Attendance Policies** *(on page 97) for more information on Policies tables.*

Schedule tables

A Schedule table is linked to the Policy table by referencing the Policy and Sub-Policy Numbers.

The following diagram shows the group box on the Schedule Master table (ST1SCR) where you enter the Policy and Sub-Policy Numbers:



A Schedule Master table (ST1SCR) contains the same values as used in the Policy table, but these generic values can be overridden. In doing so, you can create unique Schedule Master tables (ST1SCR) for specific employees or groups of employees. For example, if your organization has shifts, you would need to create a Schedule Master table (ST1SCR) for each shift.

A Schedule Master table (ST1SCR) links to a Policy table for the purpose of:

- Referring or overriding the tables referenced in the Policy Master table (PT1SCR)
- Associating employees, or groups of employees, with the table references and rules

The Schedule Activities table (ST2SCR) is optional. It is linked to the Schedule Master table (ST1SCR) and is used to override the generic Policy Activities table (PT2SCR). Use this table to create unique activities for specific employees or groups of employees.

☞ *Refer to* **Setting Up Schedules** *(on page 141) for more information on Schedule tables.*

Assigning employees to Schedules

When you have created a Schedule Master table (ST1SCR), you can assign employees to it. Employees are assigned to Schedule tables using the Schedule Assignments form (TASSCR).

☞ *Refer to* **Assigning Employees to Time and Attendance** *(on page 205) for more information on how to assign employees to Schedule tables.*

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

You must have completed the Guided Practices in the prior sections to guarantee the successful completion of the Guided Practice that follows.

Tasks

Creating a new Calendar Routine

Before you can create a new Calendar Routine, you need to copy the background program TNCL01.

1. Access the Copy Utility form (COPY)

Access this form by making the following selection from the navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Copy

For Practice, access the Copy Utility form (COPY).

2. Select the Object you want to copy

To copy the source code for the program, you must select 'EL Source'.

For practice, select 'EL Source'.

3. Enter the name of the Calendar Routine you want to copy

In the Object Key text box, enter the name of the Calendar Routine you want to copy. You can select one of the two Calendar Routines that are supplied with Time and Attendance Administration.

Note: The Object Key value is the name of the Control File record you want to edit.

Select either:

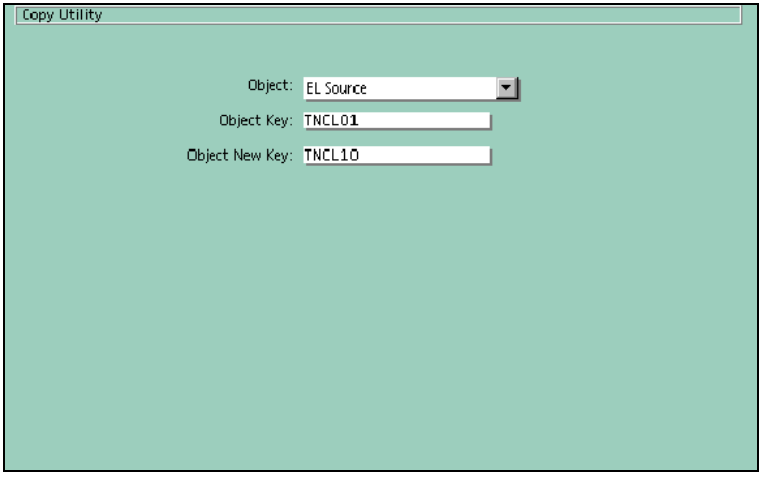
- TNCL01
- TNCL99

For practice, select 'TNCL01'.

4. Enter the name of the Calendar Routine you want to create

In the Object New Key text box, enter the name of the Calendar Routine you want to create.

For practice, type 'TNCL10'.



5. Click Save or press Enter

The source code in file TNCL01 is copied to your newly created file called TNCL10, and the following message is displayed:

'—Complete—'.
You are now ready to modify the code in file TNCL10.

For practice, click Save or press Enter.

6. Access the Edit Utility form (EDIT)

Access this form by making the following selection from the navigator:

Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

For practice, access the Edit Utility form (EDIT).

7. Select the Object you want to edit

To edit the source code for the program, you must select 'EL Source'.

For practice, select 'EL Source'.

8. Enter the Object name

To edit the source code for the program, you must enter the Object name.

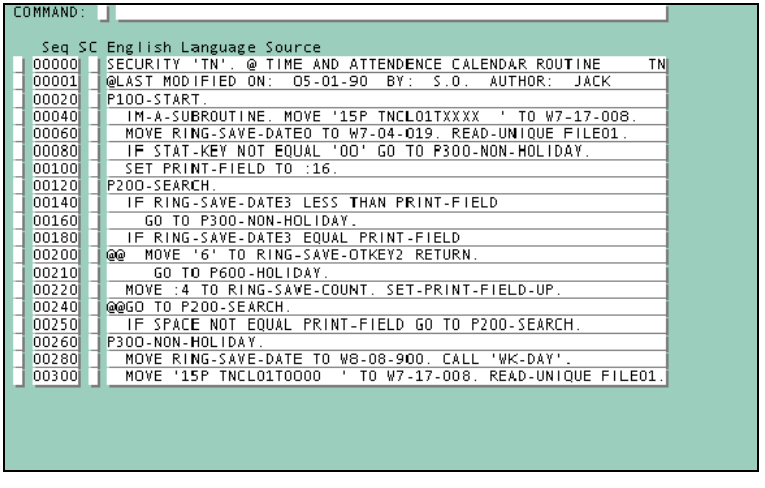
For practice, enter 'TNCL10' in the Object Key text box.

9. Click Save or press Enter

The source code for the file TNCL10 is displayed.

You are now ready to modify the code in file TNCL10.

For practice, click Save or press Enter.



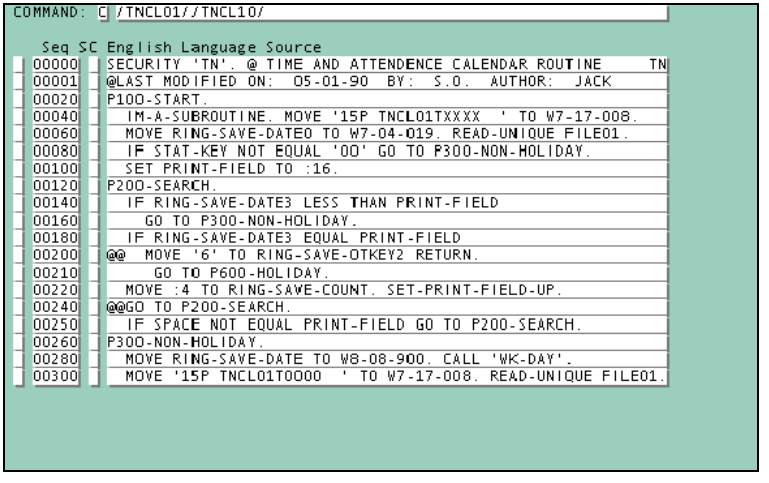
10. Edit the source code

You must change any reference to 'TNCL01', to your new file 'TNCL10'.

In the Command text box, enter 'C'. In the next text box, enter '/TNCL01//TNCL10/'. This will change any string containing 'TNCL01' to 'TNCL10'.

For example, 'TNCL01T0000' at sequence number 00300 becomes 'TNCL10T0000'.

For practice, type 'C' in the Command text box and '/TNCL01//TNCL10/' in the next text box.



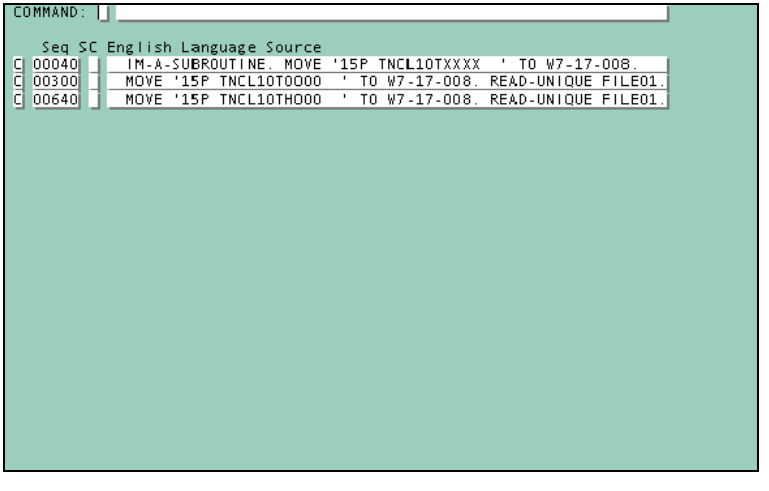
11. Click Save or press Enter

The EDIT program displays the lines of code that will be changed.

You are now ready to modify the code in file TNCL10.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:

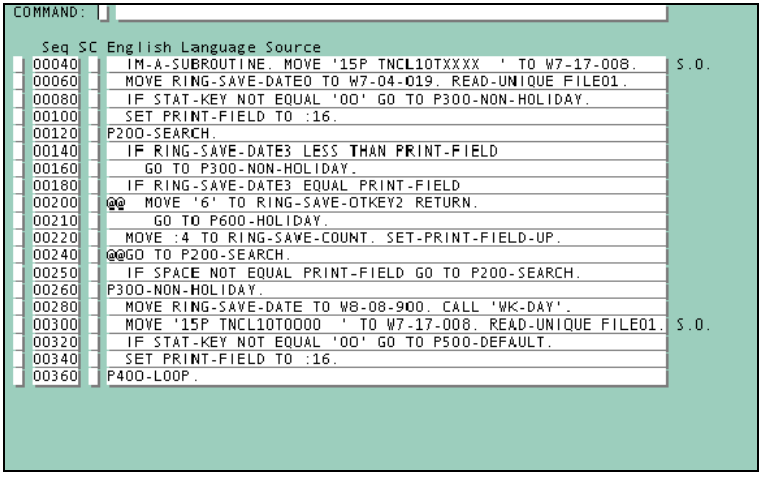


12. Click Save or press Enter

The EDIT program changes the lines of code.

For practice, click Save or press Enter.

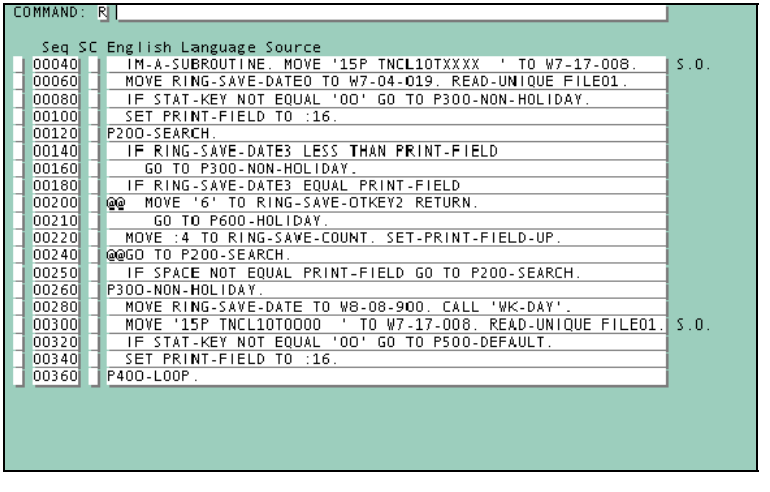
If you completed the Guided Practice, the results should look similar to the example that follows:



13. Reload the program

Enter 'R' in the Command text box to reload the program.

For practice, type 'R' in the Command text box.



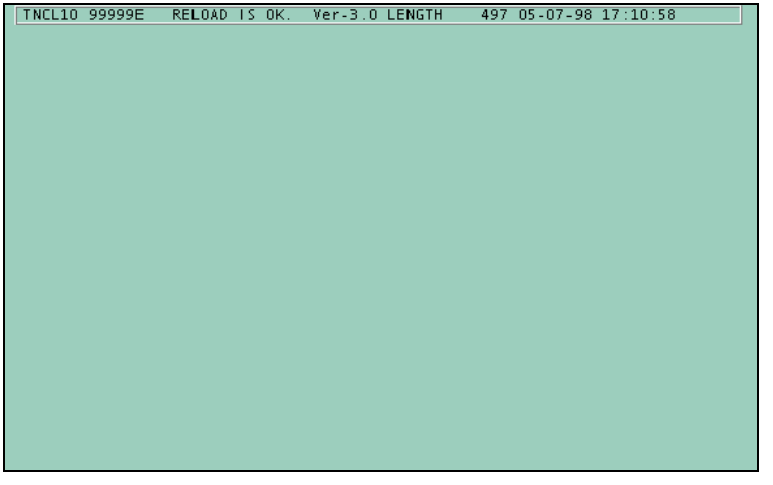
14. Click Save or press Enter

The following message is displayed:

'—RELOAD IS OK—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- **Establishing a new Calendar Routine** ***(on page 61)***

For an explanation of Calendar Routines.

Setting up your organization's holidays

The Holiday Assignment table (HOLIDAY) is used to add, change, or delete holidays to which employees within your organization are entitled. It creates an internal calendar of these holidays.

This is the first of the three Calendar Routine tables. The two-character Calendar Routine identifier you define on this table must be used on the Type Of Holiday Assignment table (TYPEHL) and the Type Of Day Assignment table (TYPEDA).

1. Access the Holiday Assignment table (HOLIDAY)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Holiday Calendar

For practice, access the Holiday Assignment table (HOLIDAY).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Calendar Routine number

Enter a two-character alphanumeric to identify the Calendar Routine.

For practice, type '10'.

4. Enter a year

Enter a year for this Calendar Routine in the format CCYY.

For practice, type '1998'.

5. Enter the holidays for your organization

Enter the holidays that apply for the Calendar Routine you are defining. These can be the holidays for your entire organization or for groups of employees within your organization who have special holiday allowances.

Enter a holiday date in the format MMDD. For example, March 1 would be entered '0301'.

You can enter up to 15 holidays. These may be entered in any order. For example, July 4 does not have to precede December 25.

For practice, type the following dates.

Holiday	Dates (MMDD)
New Year's Day	0101
Memorial Day	0525
Independence Day	0704
Labor Day	0907
Thanksgiving	1126 1127
Christmas	1224 1225

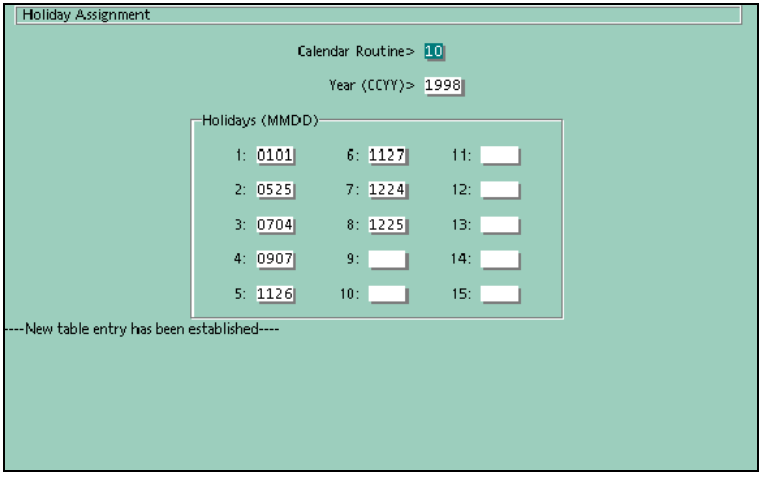
6. Click Save or press Enter

Your Holiday Assignment table (HOLIDAY) is saved and the following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- **Calendar Routines** ***(on page 61)***

For an explanation of Calendar Routines.

- **Holiday pay** ***(on page 63)***

For an explanation on how to create a Type Of Holiday Assignment table.

Establishing holiday pay rules

The Type Of Holiday Assignment table (TYPEHL) is used to define what payment an employee will receive if he or she works on a day that is defined as a holiday for the entire organization or as a holiday for a particular employee or group of employees.

Note: *This is second of the three Calendar Routine tables. The two-character Calendar Routine identifier used on this table was defined on the Holiday Assignment table (HOLIDAY) in Setting up your organization's holidays.*

In this task you are going to create a Type Of Holiday Assignment table (TYPEHL) with the following rules:

- Employees who work on a Sunday that should be a holiday will receive a special rate
- All other holidays receive the standard holiday premium if worked

1. Access the Type Of Holiday Assignment table (TYPEHL)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Types of Holiday

For practice, access the Type Of Holiday Assignment table (TYPEHL).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Calendar Routine

Enter the two-character Calendar Routine in the Calendar Routine text box.

For practice, type '10'.

4. Select a Type of Day Holiday code for each day

Select the Type of Day code for each day of the week.

For practice, on Sunday select 'Special Holiday 1'. For the remaining days, select 'Regular Holiday'.

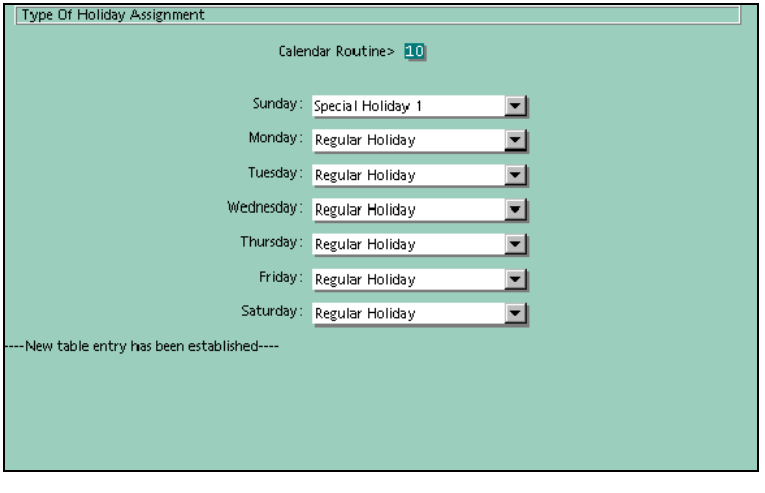
5. Click Save or press Enter

Your Type Of Holiday Assignment table (TYPEHL) is saved, and the following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- **Calendar Routines** ***(on page 61)***

For an explanation of Calendar Routines.

- **Relationship between calendar days and payments** ***(on page 65)***

For an explanation of Type of Day codes and HEDs.

Setting up daily pay rules

The Type Of Day Assignment table (TYPEDA) is used to define the days of the week as Regular Work, Special Non-Work, and so forth.

This determines what type of payment is made when an employee works on a particular day.

Note: This is last of three Calendar Routine tables. The two-character Calendar Routine identifier used on this table was defined on the Holiday Assignment table (HOLIDAY) in Setting up your organization's holidays.

In this task you are going to create a Type Of Day Assignment table (TYPEDA) with the following rules.

- Employees who work on a Sunday receive 'Special1 Work'
- All other working days receive 'Regular Work'

1. Access the Type Of Day Assignment table (TYPEDA)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Types of Day

For practice, access the Type Of Day Assignment table (TYPEDA).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Calendar Routine

Enter the two-character Calendar Routine in the Calendar Routine text box.

For practice, type '10'.

4. Select a Type of Day code for each day

Select the Type of Day code for each day of the week.

For practice, on Sunday select 'Special1 Work'. For the remaining days, select 'Regular Work'.

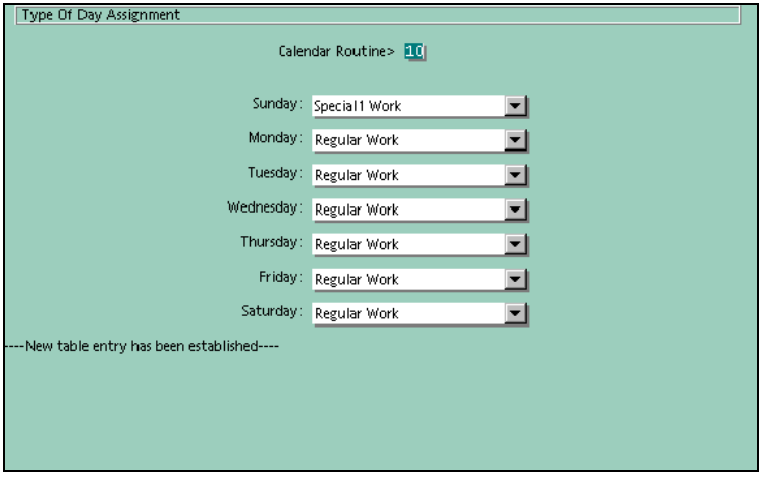
5. Click Save or press Enter

Your Type Of Day Assignment table (TYPEDA) is saved, and the following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- **Establishing a new Calendar Routine** ***(on page 61)***

For an explanation of Calendar Routines.

- **Relationship between calendar days and payments** ***(on page 65)***

For an explanation of Type of Day codes and HEDs.

Setting up earnings codes

The Earnings Code table (EC-SCR) is used to associate the codes used on the following two tables with Hours and Earnings categories (HEDs):

- Type of Holiday Assignment table (TYPEHL)
- Type of Day Assignment table (TYPEDA)

In this task you are going to create an Earnings Code table (EC-SCR) using these values:

Type of Day	Hours	Time Entry Earn Code HED	Description
Regular Work	8.00	003	Overtime Pay
Special1 Work	0.00	003	Overtime Pay
Regular Holiday	8.00	009	Holiday
Special Holiday 1	0.00	040	Sunday Holiday
Special Holiday 2	0.00	114	01Holiday

1. Access the Earnings Code table (EC-SCR)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Assign Earn HEDs

For practice, access the Earnings Code table (EC-SCR).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter an Earnings Code

Enter a four-character alphanumeric earnings code.

For practice, type 'E999'.

4. Select a pay type

Select a pay type. When time entries are created, the Time Entry Creation program uses this code to determine whether the hours in the table are to be checked against daily employee hour totals or against the pay period hour totals. Choose either:

- Daily
- Period

For practice, select 'Daily'.

5. Click Save or press Enter

You can now enter data for the earnings code you are defining.

For practice, click Save or press Enter.

6. Select the Type of Day codes

Select the Type of Day codes you want to define.

For practice, select the following Type of Day codes.

Type of Day
Regular Work
Special1 Work
Regular Holiday
Special Holiday 1
Special Holiday 2

7. Enter the hours

An employee must accrue the number of hours you enter in the Hours text box in order to earn the HED that is entered in the Time Entry Earn Code text box.

For practice, type the following hours for each Type of Day code.

Type of Day	Hours
Regular Work	8.00
Special1 Work	0.00
Regular Holiday	8.00
Special Holiday 1	0.00
Special Holiday 2	0.00

8. Enter a HED number in the Time Entry Earn Code text box

Enter a HED for the Type of Day codes you are defining. For an employee to be eligible for this HED, the hours you entered in the Hours text box must be accrued.

For practice, type the following HED values in the Time Entry Earn Codes HED text box for each Type of Day code.

Type of Day	Time Entry Earn Code HED
Regular Work	003
Special1 Work	003
Regular Holiday	009
Special Holiday 1	040
Special Holiday 2	114

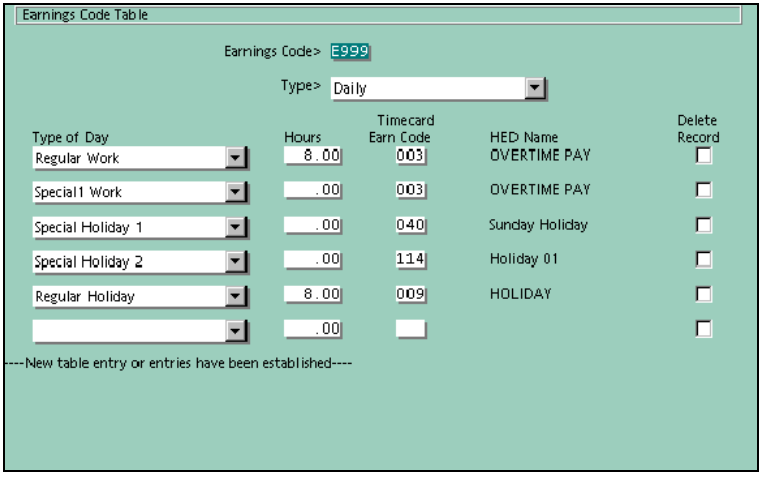
9. Click Save or press Enter

Your Earnings Code Table (EC-SCR) is saved, and the following message is displayed:

'—New table entry or entries have been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- **Establishing a new Calendar Routine** ***(on page 61)***

For an explanation of Calendar Routines.

- **Relationship between calendar days and payments** ***(on page 65)***

For an explanation of Type of Day codes and HEDs.

Deleting a record in the Earnings Code table

To delete a record in the Earnings Code table (EC-SCR), complete the following steps:

1. Access the Earnings Code table (EC-SCR)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Assign Earn HEDs

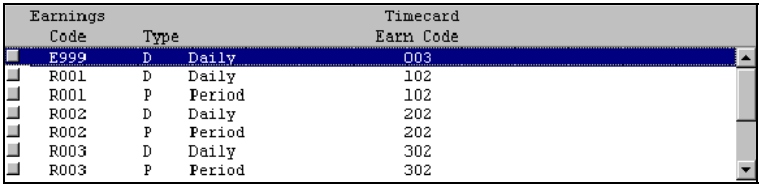
For practice, access the Earnings Code table (EC-SCR).

2. Select an Earnings Code table (EC-SCR)

Access the message area using the Selections button on the toolbar.

Select an Earnings Code table (EC-SCR) by double-clicking on an entry.

For practice, double-click on Earnings Code 'E999'.

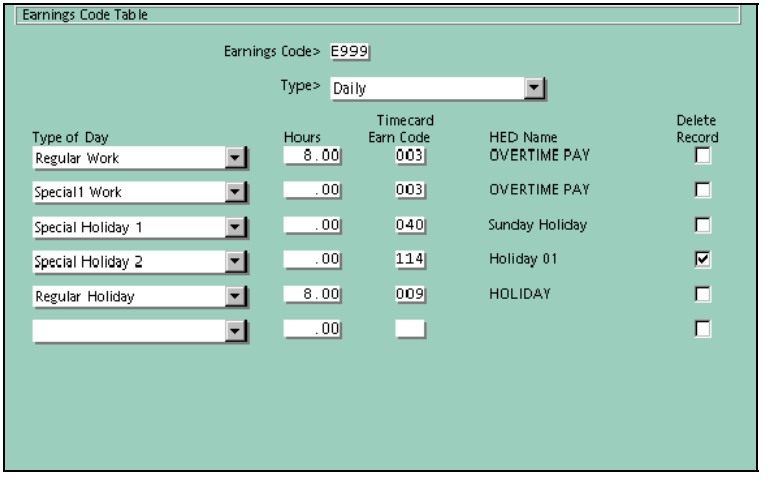


Earnings Code	Type		Timecard Earn Code
E999	D	Daily	009
R001	D	Daily	102
R001	P	Period	102
R002	D	Daily	202
R002	P	Period	202
R003	D	Daily	302
R003	P	Period	302

3. Delete a Type of Day record

Select the Delete Record check box next to the Type of Day code you want to delete. To delete multiple codes, select more than one Delete Record check box.

For practice, select the check box next to the Type of Day code 'Special Holiday 2'.



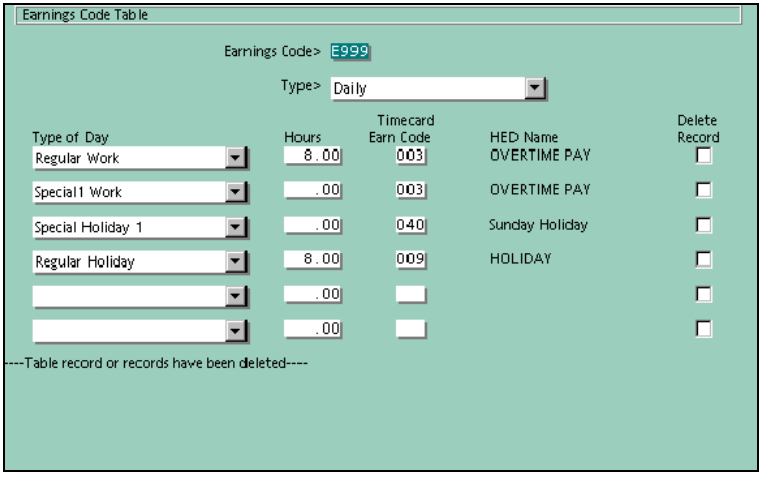
4. Click Save or press Enter

The record is deleted and the table is updated, and the following message is displayed:

'—Table record or records have been deleted—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Setting up Shift Premiums (optional)

A Shift Premium is an optional supplementary allowance that can be paid for working unsociable hours or for performing hazardous work.

In this task create a Shift Premium table (SP-SCR) for the Type of Day code 'Regular Work', using the following information. Your organization has three shifts and operates 24 hours per day. The Regular and Overtime Shift rates are as shown.

Shift	Shift Start Time	Regular Shift	Overtime Shift
A	01:00	3	6
B	08:00	1	4
C	16:30	2	5

1. Access the Shift Premium table (SP-SCR)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Shift Premium

For practice, access the Shift Premium table (SP-SCR).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Shift Premium identifier

Enter a four-character alphanumeric Shift Premium identifier. The Shift Premium identifier is user defined and can be up to four alphanumeric characters.

For practice, type 'SP01'.

4. Select a Type of Day Code

For practice, select 'Regular Work'.

5. Enter the Shift Start times

Enter the time that each shift starts.

Use 24-hour military time. For example, to enter a shift start time for of midnight, you would type '00:00'. To enter a time of four thirty in the afternoon, you would type '16:30'. Entries must be sequential but they do not have to correspond to an actual shift start time.

For practice, type '01:00', '08:00', and '16:30'.

6. Enter the Regular Shift codes

For each shift, enter a one-digit code, representing a Shift Premium identifier for regular hours worked. The number entered here may be populated to the time entries generated by the Time Entry Validation/Creation program (TMCARD).

- For the 01:00 shift, enter '3'
- For the 08:00 shift, enter '1'
- For the 16:30 shift enter '2'

7. Enter a Overtime Shift code

Enter a one-digit shift code, representing a Shift Premium identifier for overtime hours worked. The number entered here may be populated to the time entries generated by the Time Entry Validation/Creation program (TMCARD).

- For the 01:00 shift, enter '6'
- For the 08:00 shift, enter '4'
- For the 16:30 shift, enter '5'

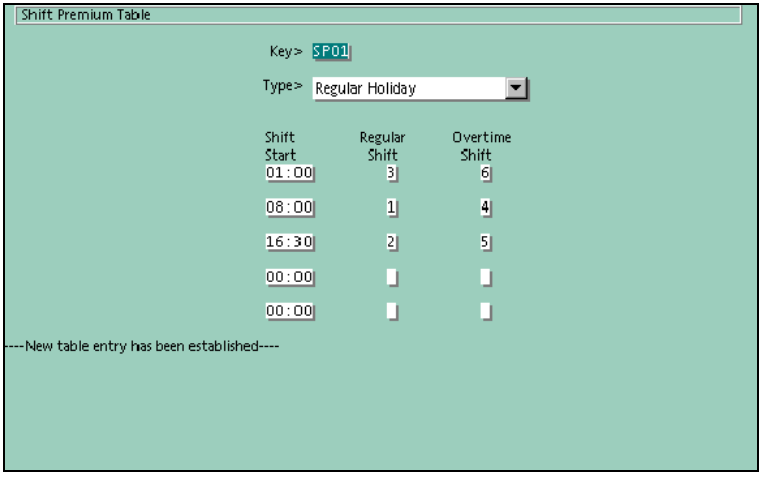
8. Click Save or press Enter

Your data for the Regular Work are saved, and the following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Note: Repeat these steps to create a Shift Premium table (SP-SCR) for each Type of Day code (Special 1 Work, Regular Holiday, and so forth) that must have Shift Premiums.

Deleting a Shift Premium table

To delete a Shift Premium table (SP-SCR), follow these steps.

1. Access the Shift Premium table (SP-SCR)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Shift Premium

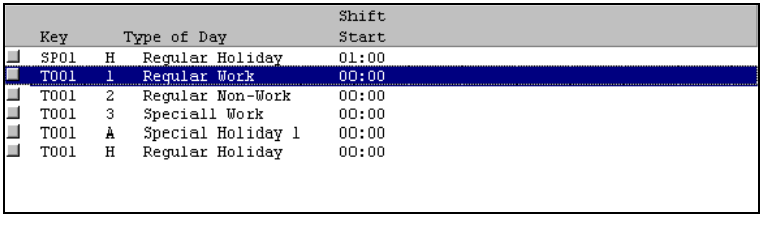
For practice, access the Shift Premium table (SP-SCR).

2. Select a Shift Premium table (SP-SCR)

Access the message area using the Selections button on the toolbar.

Select a Shift Premium table (SP-SCR) by double-clicking on an entry.

For practice, double click on Shift Premium 'T001 Regular Work'.



3. Delete the Shift Premium table (SP-SCR)

Delete this table using the Del Entry button on the toolbar.

For practice click on the Del Entry button on the toolbar.

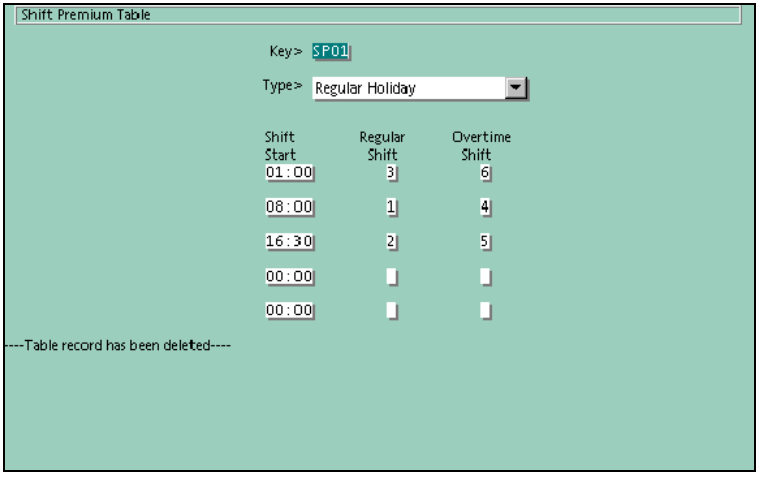
4. Click on the Yes button or press Enter

A confirmation dialog box will appear. To delete the Shift Premium table (SP-SCR), click on the Yes button. The following message is displayed:

'—Table record has been deleted—'.

For practice, click on the Yes button or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Review of Questions Answered

1. What is a Calendar Routine?

2. How do you define payment rules for working holidays?

3. How do you define payment rules for working on non-working days?

4. How do you define payment rules for working days?

5. What is the relationship between Type of Day codes and HEDs?

6. How are Shift Premiums used?

7. What is the relationship between Calendar Routines, Policies, and Schedules?

CHAPTER 5

Setting Up Time and Attendance Policies

In This Chapter

Introduction

Time and Attendance Policy and Schedule tables contain your organization's rules relating to working time procedures such as clocking-in and out, docking for lateness, and overtime.

Policy tables are associated with a Calendar Routine, Earnings Code and Shift Premium tables. The rules you establish in these tables are used by the Policy tables when the system processes employee clock transactions (rings).

In this section the key concepts and tasks associated with establishing the Time and Attendance Policies tables are described.

Tasks

The following tasks are discussed in this section:

- Creating a Policy table
- Setting up activity rules for shift start and end
- Setting up Other activity rules
- Copying Master Policy tables
- Establishing a One Time Grace Period (optional)
- Accessing and deleting policy tables

Prerequisites

Before you can begin to set up Time and Attendance Policy tables you must ensure that the Time and Attendance implementation tasks have been completed.

Please refer to **Implementing Time and Attendance Administration** *(on page 57) for details about the implementation tasks.*

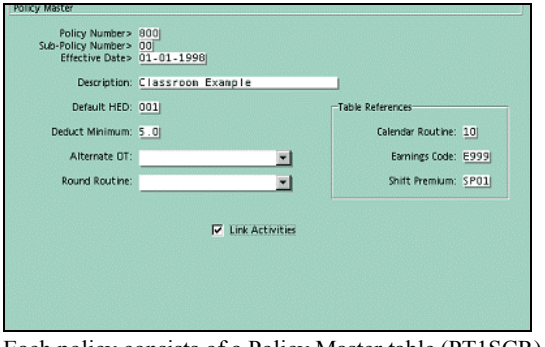
Questions answered

The following questions are answered in this section:

1. Why use Deduct Minimum?
2. What effect do the different Punch Types have?
3. How are Grace and Round times used?
4. What is a One Time Grace Period?
5. How are Warnings and Rejects times used?

What are policy tables?

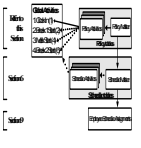
Policy tables are the highest-level tables. They are used to record the generic (or master) rules for a company or group of employees. These include your organization's rules for working time procedures, such as clocking-in and out, docking for lateness, and overtime. Policy tables are associated with a Calendar Routine, Earnings Code and Shift Premium tables by entering the appropriate identifier.



Each policy consists of a Policy Master table (PT1SCR), and one or more Policy Activities tables. The ability to create multiple Policy Master tables allows you to create activity rules for different employees, or groups of employees.

The following diagram gives an overview of the sequence and relationship between the different Policy tables. The relationship to Schedule tables is also shown.

For a more detailed explanation of each table, refer to each subject as indicated in the diagram.



Policy Master tables - your options

The Policy Master table (PT1SCR) is used to set up your organization's time and attendance rules concerning:

- HEDs
- Minimum hours worked to permit meal deduction
- Which Calendar Routine to use
- Which Earnings Code table to use
- Which Shift Premium table to use
- Which Round Routine rules to use

A Policy Master table (PT1SCR) must exist before Policy Activity tables can be created. The information on the Policy Master table applies to all Policy Activities tables that use the same Policy and Sub-Policy Numbers.

A Policy Master table (PT1SCR) can have several Policy Activity tables associated with it. These different tables are created for different types of employees, or groups of employees.

Each activity table has the rules for the different activities that will take place during a working day. The Clock-In (1), and Clock End (8) activities are mandatory. Optional Activities include Break 1 Start (2), Meal Start (4), and Break 2 Start (6).

Apply the Concept
Determine how many different types of employees, or groups of employees exist in your organization. Based on this, identify how many different types of Policy Master tables you will need to create. Use the table below to record your answer.

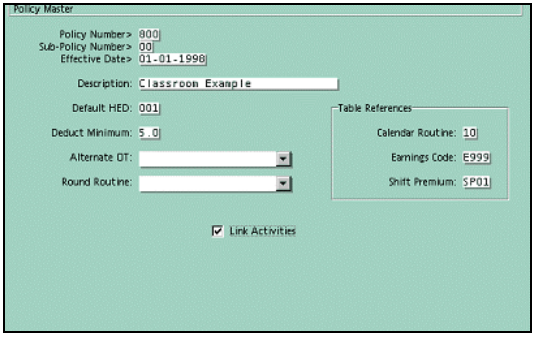
	Table name/description	Employee/Group of Employees who use this table
1		
2		
3		
4		
5		
6		
7		

Understanding Deduct Minimum

The Deduct Minimum value is entered on the Policy Master table (PT1SCR). The existing value may be used or an override value may be entered. Use this feature when:

- A Schedule Activities table (ST2SCR) for the Policy Master table (PT1SCR) contains the activity Meal Start
- The Punch Type for the activity is Optional Minimum, Required Minimum, or Need Not Punch
- Clock transactions (rings) are not present for the meal activity
- The time taken for the meal break is not paid

When these conditions occur the time taken for the meal is automatically deducted from the total time the employee is at work.



However, when an employee does not work the entire shift. The Deduct Minimum feature enables you to determine the minimum number of hours an employee must have worked before the automatic deduction is made.

For example, a meal break occurs after five hours of the shift has elapsed. It is an unpaid activity that last 30 minutes. In the Deduct Minimum text box you would enter a value of '5.0'.

An employee would have to work at least five hours before the automatic deduction for the meal break is made. When the employee has completed the shift, the meal break would be deducted from the total number of hours he or she has worked.

If the employee worked only four hours, no deduction would be made for the activity and the employee would be paid for the four hours.

Note: *Any entry you make in the Policy Master table (PT1SCR) can be overridden in the associated Schedule Master table (ST1SCR).*

Round Routines and their impact

Because all employees will not clock-in and out at the exact start or end of an activity, you must decide how Time and Attendance Administration will process the different clock transaction (ring) times.

You must set up the system to process an employee's clock transaction (ring) time in relation to an activity start time.

To process this range of times, Time and Attendance Administration uses a feature called Round Routines. In the Round Routine text box on the Policy Master table (PT1SCR), you must select which Round Routine you will use for the particular Policy table you are defining. The options are:

- None
- Standard
- One Time Grace Period for clocking in and out
- One Time Grace Period for all activities

Note: If you do not select a particular Round Routine option, the Time and Attendance system assumes that you want to use 'Standard' Round Routine.

Note: Any Round Routine Options that you define in a Policy table can be overridden in a Schedule table.

☞ *Refer to* **Setting up Schedules** *(on page 141), for more information.*

Round Routines - the differences

In order to understand what the differences are between the two different types of Round Routine (Standard and One Time Grace Period), you need to understand how Round Routines are used.

You must set up the Time and Attendance system to process an employee's clock transaction (ring) time in relation to an activity start time. To do this you must define the following four conditions for each activity you create. Activities are defined on the Policy Activities table. These conditions define what your company's rules are when employees:

- Start the activity early - (Start Early)
- Start the activity late - (Start Late)
- End the activity early - (End Early)
- End the activity late - (End Late)

Each of these conditions has four associated text boxes. These text boxes are:

- Grace
- Round
- Warning
- Reject

Defining Grace and Round times

The Round and Grace text boxes determine paid hours for employees. The values in these text boxes enable the system to determine when to dock or credit an employee's time, based on their clock transaction (ring). The Round time also determines the increments of time that are used in the clock transaction (ring) calculation.

The following values are used in this next example:

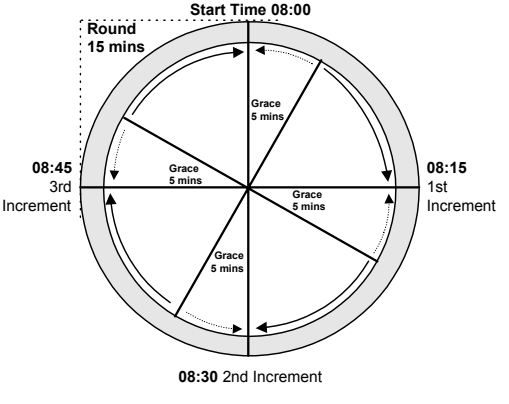
- Round Routine is Standard Round
- The condition is Start Late
- Grace value is 5
- Round Value is 15, therefore the increments occur every 15 minutes
- Start time is 08:00

When using the Standard Round Routine, the Grace value is used for each increment, as shown in the following diagram. The increments are 08:15, 08:30, 08:45 and so on.

If an employee clocked in at 08:04, their time is rounded back to 08:00.

If an employee clocked in at 08:10, their time is rounded forward to 08:15.

If an employee clocked in at 08:17, their time is rounded back to 08:15.



In the next example, the following options are being used:

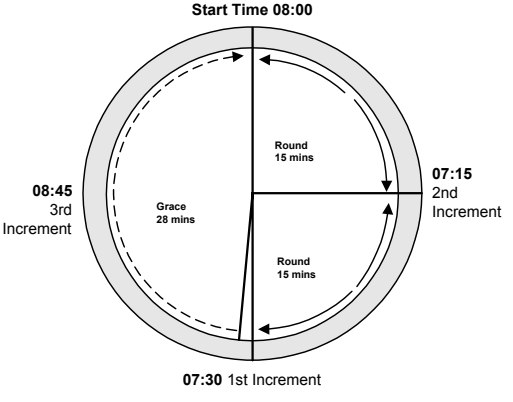
- Round Routine is One Time Grace Period
- The condition is Start Early
- Grace value is 28
- Round Value is 15, therefore the increments occur every 15 minutes
- Start time is 08:00

If the employee clocked in at 07:35 there actual time is within the 28 minute Grace period and is rounded forward to 08:00.

If an employee clocked in at is 07:31 there time is outside of the Grace period and is rounded backward to 07:30, which is the first increment of Round.

If an employee clocked in at 07:25 there time is rounded forward to 07:30, which is the nearest increment of Round.

If an employee clocked in at 07:20 there time is rounded back to 07:15, which is the nearest increment of Round.



Note: The Round and Grace entries are completely independent from the Warning Time and Reject Time entries.

Apply the Concept
Identify what the Grace and Round values will be for the different activities you have identified.

Calculating Grace and Round rules for employees who start early

If the time span between the actual time an employee clocks in and the scheduled start time is equal to or greater than the value entered in the Grace text box, the system will round to the first increment of Round.

At this point the system will compare the time span between the actual time and the first increment. If the time span is greater the grace value, it will round again to the next increment of Round.

This will continue until the time span between the actual time and the last increment of Round is less than the Grace value. When this occurs, the last increment of Round achieved becomes the new rounded time.

The following three examples illustrate this rule. The settings for this example are:

- Round Routine is Standard
- Condition is Start Early
- Shift start time is 08:00
- Grace time is 10 minutes
- Round time is 15 minutes

Example A

An employee arrives to work at 07:48. The shift start time is 08:00 and the actual employee start time is 07:48, therefore the time span is 12 minutes.

The time span is greater than the value entered in the Grace text box (Grace value is 10 minutes, time span is 12 minutes).

In this example the system will round back (counter clockwise) to the first increment of Round and record the employee's time at 07:45.

Note: In this example, increments are measured in 15-minute intervals. This time is determined by the Round value.

Example B

An employee arrives to work at 07:34. The shift start time is 08:00 and the actual employee start time is 07:34, therefore the time span is 26 minutes.

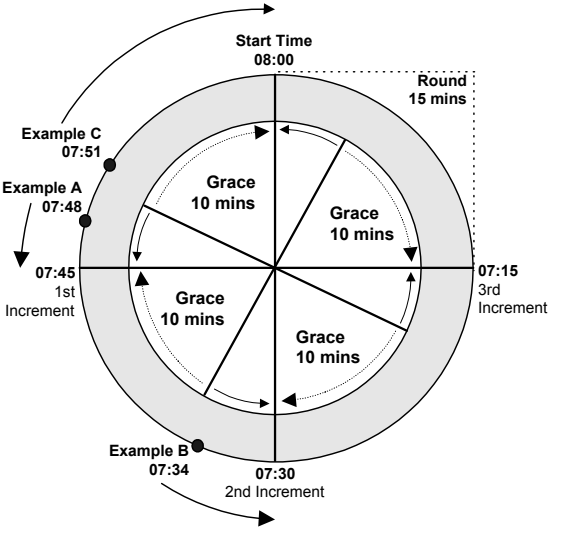
The system compares the time span and the first increment of Round. The time span is greater than the first increment of Round (15 minutes), so it rounds again (counter clockwise) to the second increment of Round. In this example the time span falls within the second increment of Round.

The system compares the actual time to the Grace and Round values of the second increment of Round. The actual time of 07:34 is outside of the Grace period, so the employee's start time is rounded back to 07:30.

Example C

An employee arrives to work at 07:51. The shift start time is 08:00 and employee start time is 07:51, therefore the time span is 9 minutes.

In this example, the system will round forward (clockwise) to the shift start time, recording the employee's start time at 08:00. The system rounds forward because the Clock-In time is within the Grace period time span for the first increment of Round.



Calculating Grace and Round rules for employees who start late

The same principle of Grace and Rounding are used when setting up the rules when employees start late.

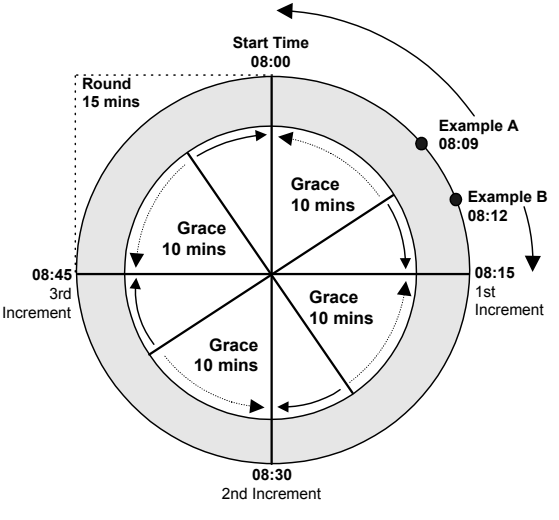
- Round Routine is Standard
- Condition is Start Late
- Shift start time is 08:00
- Grace time is 10 minutes
- Round time is 15 minutes

Example A

If an employee arrives at 08:09, the Clock-In time is rounded (counter clockwise) to 08:00.

Example B

If the employee arrives at 08:12, the Clock-In time is rounded forward (clockwise) to 08:15.



Using One Time Grace Period Round Routine options

Having selected one of the One Time Grace Period options on the Policy Master table (PT1SCR), you can then create an activity using the Policy Activities form (PT2SCR).

When you define a Round Routine on the Policy Master table (PT1SCR), you must decide which of the One Time Grace Period options you are going to use. The One Time Grace Period options are:

- One Time Grace 1&8 Only
- One Time Grace All

The first option (One Time Grace 1&8 Only) means that One Time Grace Periods will only be used for the following activities:

- Clock-In - activity code 1
- Clock-out - activity code 8

The second option (One Time Grace All), means that One Time Grace Periods can be defined for all activities.

One Time Grace Period for activities 1 and 8

This option is used when the employee clocks in or out for a shift.

A grace period will only be used at the beginning or end of the shift. For example, you could have 30 minutes of grace time before the start of the shift and 30 minutes of grace time after the shift. When an employee creates a clock transaction (ring) within a grace period, the time is rounded to either the start or end of the shift.

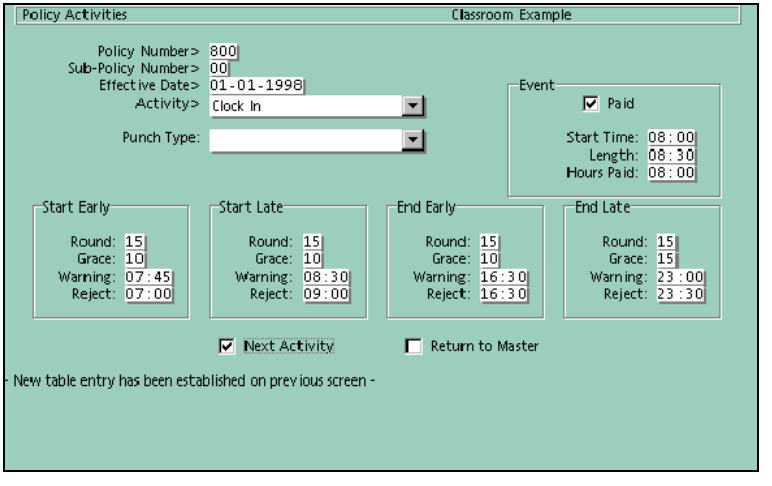
When an employee's clock transaction (ring) is outside the grace period, the clock transaction (ring) will round to the nearest increment of Round.

One Time Grace Period for all activities

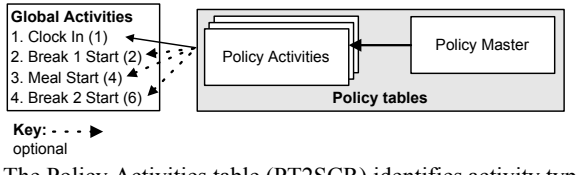
This is similar to One Time Grace Period for clocking in and out. If this option is selected, the grace period is used for all the activities you specify using the Policy Activities table (PT2SCR).

Policy activities - your options

After you have established a Policy Master table (PT1SCR) you then establish the Policy Activities table (PT2SCR). Each Policy Master table must have at least one Policy Activities table.



You can create additional Policy Activities table (PT2SCR) for the activities you will use.



The Policy Activities table (PT2SCR) identifies activity types for each point in a workday where the process of clocking in and out should be monitored. Each policy activity also contains time parameters that will be used to calculate whether an employee will be docked or credited time.

Note: *For each Policy Activities table, you must define the activity 'Clock In (1)'. This is a mandatory activity.*

In order to create the association between a Policy Master table and a Policy Activities table, you must use the same values in the following text boxes for both tables:

- Policy Number
- Sub-Policy Number
- Date

The following table shows the different activity types, and activity number:

Activity	Activity Number
Clock-In (Mandatory)	1
Break 1 Start	2
Break 1 End	3
Meal Start	4
Meal End	5
Break 2 Start	6
Break 2 End	7
Clock Out (Mandatory)	8

Apply the Concept
Identify which activities you will need to set up for the different Policy Master tables.

Punch Types options and their impact

The term punch type stems from when employees clock-in and out of work by inserting a timecard into a punch card machine. When the employee inserted the timecard into the machine it would punch the card with the date and time the employees started or finished the activity.

With Time and Attendance Administration, instead of using a timecard to record employee activity, employees swipe their badge through a badge reader.

For example, your organization may require employees to swipe their badges through a badge reader when starting and ending a particular activity, in order to record the start time and duration of the activity. These Punch Type options are stored in the Policy Activities table (PT2SCR). The punch type options are:

- None
- Need Not Punch
- Optional Minimum
- Optional Punch
- Required Minimum
- Required Punch

Note: Punch types can only be used for the activities Break 1 Start (2), Meal Start (4) and Break 2 Start (6).

Punch Type settings and Time Entry Validation

When validating clock transactions (rings), the Time Entry Validation program checks the Punch Type setting to determine if clock transactions (rings) should be present for the activity.

For example, an employee is required to clock in and out for meal breaks. Suppose the employee forgets to do so and a clock transaction (ring) has not been created. A warning message is generated for the individual clock transaction (ring) record. This warning condition will allow the creation of a time entry. A reject message will not.

☞ *Refer to* **Capturing Employee Work Time** *(on page 253), for a list of the possible exception conditions and exception codes associated with this process.*

The following table shows the effects that each punch type would have when calculating time entries hours for the activity meal break:

Punch Type	Clock transactions (rings) Found for the Activity	Clock transactions (rings) Not Found for the Activity
Need Not Punch	Deduct actual rounded time from the total number of hours for the shift.	Deduct length of event minus the hours of the event paid.
Optional Minimum	Deduct greater of actual rounded time or length of event.	Deduct length of event minus hours of event paid.

Punch Type	Clock transactions (rings) Found for the Activity	Clock transactions (rings) Not Found for the Activity
Optional Punch	Deduct actual rounded time.	No deduction.
Required Minimum	Deduct greater of actual rounded time or length of event.	No deduction. A Reject messaged is generated.
Required Punch	Deduct actual rounded time.	No deduction. A Reject message is generated.

For example, for a meal break activity you select the punch type 'Need Not Punch'. If the employee clocks in and out for the meal break this creates a clock transaction (ring). The amount of time deducted from the employee's total time for their working day is the actual rounded time for the meal break.

The actual rounded time for the meal break activity is determined by the:

- Clock in and out times
- Round
- Grace Period

Understanding Warning and Reject

As all employees will not clock-in and out at the exact start or end of an activity, time parameters must be defined for the following four conditions. These conditions define what your company's rules are when employees:

- Start Early
- Start Late
- End Early
- End Late

The Warning and Reject time text boxes values allow the system to determine if employees are not conforming to your organization's time and attendance policies.

Warning time

Warning time is used to set a period of time after which an employee's clock transaction (ring) will be flagged as a warning exception for a particular activity. A warning condition will allow the creation of a time entry. A reject message will not.

Warning times are defined on the Policy Activities table (PT2SCR). Values entered on this table can also be overwritten for different schedule groups by using the Schedule Activities table (ST2SCR).

Reject time

A reject time is the point at which an error condition will occur. An error condition must be corrected and approved before a time entry can be generated by the system. A warning message will allow the creation of a time entry. A reject message will not.

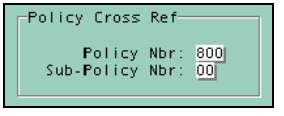
Reject times are defined on the Policy Activities table (PT2SCR). Values entered on this table can also be overwritten for different schedule groups by using the Schedule Activities table (ST2SCR).

Apply the Concept
Choose one of the activities, and determine what the Warning and Reject values would be for the different conditions.

Relationship between Policy tables and Schedule tables

Schedule tables contain the same type of information as Policy tables and are associated with a Policy table using the Policy Number and Sub-Policy Number.

The following diagram shows the group box on the Schedule Master table where you enter the Policy and Sub-Policy Numbers:



☞ *Refer to* **Setting up Schedules** *(on page 141) for information on Schedule tables and Schedule Activities.*

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

You must have completed the Guided Practices in the previous sections to guarantee the successful completion of the Guide Practice that follows.

Tasks

Creating a policy table

The Policy Master table (PT1SCR) establishes all the general policy information that will be used by any table that is associated with it.

1. Access the Policy Master table (PT1SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Policy Master

For practice, access the Policy Master table (PT1SCR).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Policy Number

Enter a three-character alphanumeric Policy Number.

For practice, type '800'.

4. Enter a Sub-Policy Number

Enter a two-character numeric Sub-Policy Number.

For practice, type '00'.

5. Enter an Effective Date

Enter an effective date for the policy. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-01-1998'.

6. Enter a description

Enter a brief description of the policy.

For practice, type 'Classroom Example'.

7. Enter a Default HED

Enter a default HED number for this policy. This is normally '001' for regular pay.

For practice, type '001'.

8. Enter a Deduct Minimum

This is the number of hours in a day that have to be worked before an automatic meal deduction is made.

Note: If you enter a value in this text box the Punch Type text box on the Policy Activities table (PT2SCR) must contain one of the following entries so that the automatic deduction can be taken.

- Optional Minimum
- Required Minimum
- No Punch Needed
- *For practice, type '5.0'.*

9. Select an Alternate OT (Puerto Rico only)

Select an alternate overtime.

Note: This step only applies to users of Time and Attendance Administration that has been modified for use in Puerto Rico.

10. Select a Round Routine

To use the One Time Grace Period feature you must select which activities this feature will be applied to.

This is a One Time Grace Period indicator for a schedule's activity. The options are:

- None.
- One Time Grace 1 & 8 Only. (This determines that a One Time Grace Period will be applied for 'Clock in 1', and 'Clock Out 8').
- One Time Grace All. (This determines that a One Time Grace Period will be applied for all activities).
- Standard Round (Default). The standard Grace and Round rules will be used.

For practice, do not select a Round Routine.

11. Enter a Calendar Routine

Enter a two-character Calendar Routine identifier.

A Calendar Routine is defined in the following forms:

- Holiday Assignment
- Type of Day Assignment
- Type of Holiday

For practice, type '10'.

12. Enter an Earning Code

Enter a four-character Earnings Code identifier. The Earnings Code identifiers are defined on the Earnings Code table (EC-SCR).

For practice, type 'E999'.

13. Enter a Shift Premium (optional)

If applicable, enter a four-character Shift Premium identifier. A Shift Premium identifier is defined on the Shift Premium table (SP-SCR).

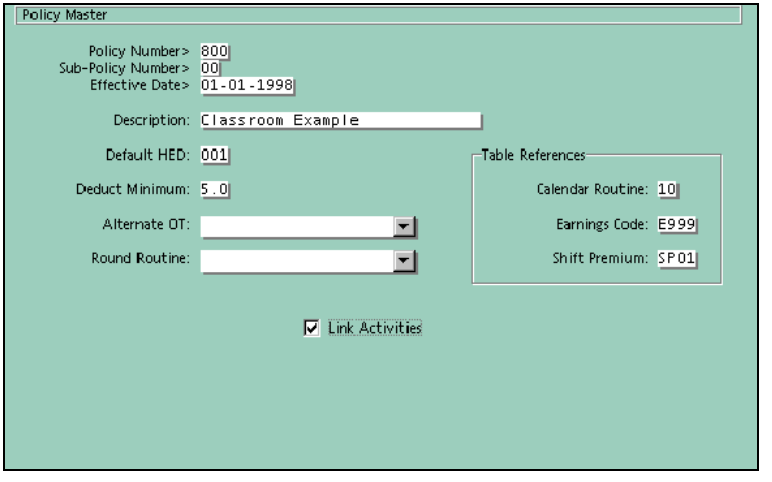
For practice, type 'SP01'.

14. Select the Link Activities check box (optional)

If you select the Link Activities check box the Policy Activities table will appear when you click Save.

The first three text boxes on the linked Policy Activities table will contain the values that you have entered on this form.

For practice, select the Link Activities check box.



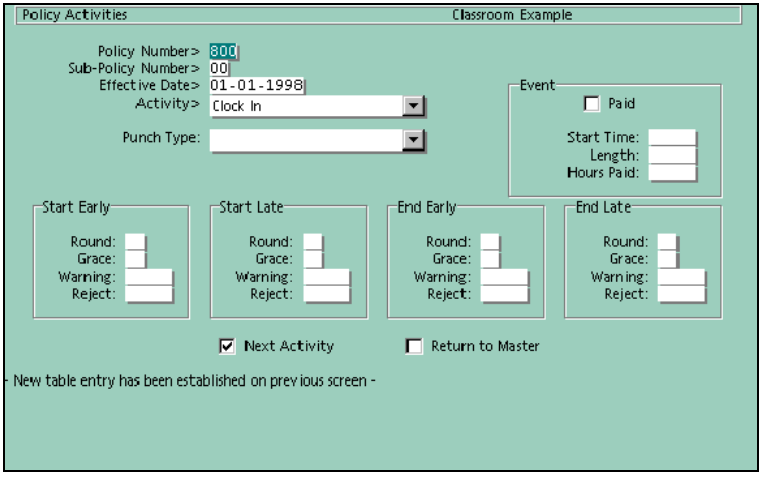
15. Click Save or press Enter

Your Policy Master table is saved.

For practice, click Save or press Enter.

As you selected the Link Activities check box the Policy Activities table (PT2SCR) appears and the following message is displayed:
'New table entry has been established on previous form'.

If you completed the Guided Practice the results should look similar to the example that follows:



See also:

- What are policy tables? ***(on page 99)***

For more information on Policy tables.

- Policy Master tables - your options ***(on page 100)***

For more information on a Policy Master table.

Setting up activity rules for shift start and end

When you have created a Policy Master table (PT2SCR) you must then create your organization rules for shift start and end using the Policy Activity table (PT1SCR).

Note: In order to create the association between a Policy Master table and a Policy Activities table you must use the same values in the following text boxes for both tables:

- Policy Number
- Sub-Policy Number

Note: To follow this task you need to have completed **Creating a policy table** *(on page 116).*

1. Access the Policy Activities table (PT2SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Policy Activities

For practice, access the Policy Activities table (PT2SCR).

If you selected the Link Activities check box on the Policy Master table (PT1SCR) in Task 1 the Policy Activities table (PT2SCR) should already be displayed. The first three text boxes on the Policy Activities table will contain the values you entered on the Policy Master table.

2. Select an activity

As you are creating a new Policy Activity table the default activity 'Clock-In' will be displayed. This is a mandatory activity that you must define.

For practice, leave the default activity 'Clock-In'.

3. Select a Punch Type

The system assumes that your employees must always clock in and out. This is a mandatory activity that must be defined.

For practice, leave this list box blank.

4. Select the Paid check box

Select the Paid check box. This indicates that the activity Clock-In is a paid activity.

Note: An Unpaid activity is generally a meal break, or rest break.

For practice, select the 'Paid' check box.

5. Enter the Start Time

Enter the Start Time for the 'Clock-In' activity.

Use 24-hour military time. For example, to enter a time for midnight you would enter 00:00. To enter a time for four thirty in the afternoon you would enter 16:30. Entries must be in sequential order but do not have to correspond to an actual shift start.

For practice, type '08:00'.

6. Enter the Length

As the activity is 'Clock-In', this value must be the total number of hours in a day that the employee is present at work. This total includes meals, breaks, and other events that may be docked from the total time paid.

For practice, type '08:30'.

7. Enter the Hours Paid

Enter the total number of hours that will be paid for this activity.

For practice, type '08:00'.

In this example, the length of the event is '08:30' for a day, but there is an unpaid lunch break of 30 minutes. Therefore the entry in the Hours Paid text box must be '08:00'.

The system will automatically calculate the 'Clock End (8)' activity by adding the 'Start Time' and activity 'Length'. In this example, the 'Clock End (8)' activity time is 16:30 (08:00 plus 08:30).

8. Enter the Round and Grace time for Start Early

Enter the Round and Grace time for the condition 'Start Early'.

For practice, type '15' in the Round text box, and '10' minutes in the Grace text box.

For example, your organization's start time is 08:00. An employee must arrive at, or before 07:50, in order to be paid for the additional 15 minutes. If they arrive after 07:50, their clock-in time is rounded to 08:00.

9. Enter the Warning and Reject time for Start Early

Enter the Warning and Reject times for the condition 'Start Early'.

For practice, type '07:45' in the Warning text box, and '07:00' in the Reject text box.

In this example, your organization wants to be warned if employees arrive before 07:45. They do not allow anyone to clock-in before 07:00.

10. Enter the Round and Grace time for Start Late

Enter the Round and Grace time for the condition 'Start Late'.

Note: The Grace value must not be greater than the round value except when utilizing the One Time Grace feature.

For practice, type '15' in the Round text box, and '10' minutes in the Grace text box.

For example, your organization's start time is 08:00. If an employee arrives before 08:10, the start time is rounded back to 08:00. If an employee arrives at or after 08:10, the clock in time is rounded to 08:15.

11. Enter the Warning and Reject time for Start Late

Enter the Warning and Reject times for the condition 'Start Late'.

For practice, type '08:30' in the Warning text box, and '09:00' in the Reject text box.

In this example, your organization will be warned if employees arrive after 08:30, and employees will not be allowed to clock in after 09:00.

12. Enter the Round and Grace time for End Early

Enter the Round and Grace time for the condition 'End Early'.

The Grace value must not be greater than the round value, except when utilizing the One Time Grace feature.

For practice, type '15' in the Round text box, and '01' minute in the Grace text box.

For example, in your organization an employee must work 8 hours. Employees may not clock-out before 16:30. Employees who leave 1 minute early are docked 15 minutes.

13. Enter the Warning and Reject time for End Early

Enter the Warning and Reject times for the condition 'End Early'.

For practice, type '16:30' in the Warning text box, and '16:30' in the Reject text box.

In this example, the system will generate an error for any employee who clocks out earlier than the designated end of the shift.

14. Enter the Round and Grace time for End Late

Enter the Round and Grace time for the condition 'End Late'.

The Grace value must not be greater than the round value, except when utilizing the One Time Grace feature.

For practice, type '15' in the Round text box, and '15' minutes in the Grace text box.

For example, if an employee works until 16:40, the clock out time is rounded back to 16:30 and no overtime is credited. If an employee works until 16:57, the clock out time is rounded back to 16:45, and that employee will be paid 15 minutes of overtime.

15. Enter the Warning and Reject time for End Late

Enter the Warning and Reject times for the condition 'End Late'.

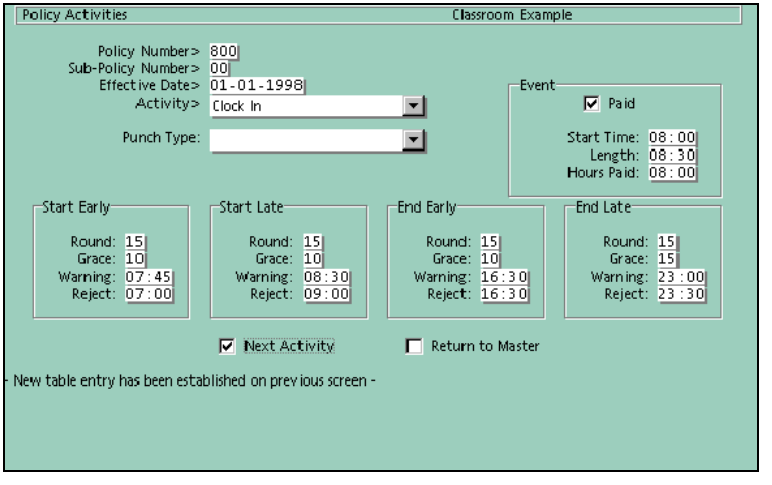
For practice, type '23:00' in the Warning text box, and '23:30' in the Reject text box.

In this example, your organization allows overtime, but wants to be warned if employees remain after 23:00. If an employee remains after 23:30 an error must be generated.

16. Select the Next Activity check box (optional)

If you intend to establish rules for other activities such as breaks and meals, select this check box.

For practice, select the 'Next Activity' check box:



17. Click Save or press Enter

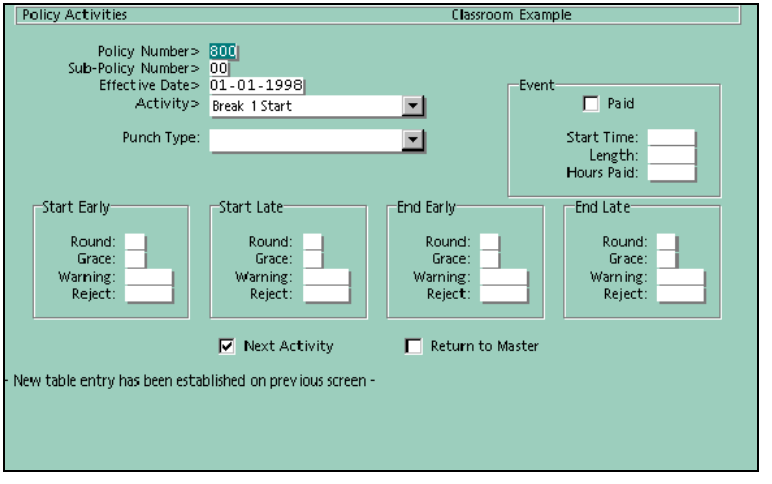
Your Policy Activity table (PT2SCR) is saved.

For practice, click Save or press Enter.

If you selected the Next Activity check box, the form is refreshed, and the next activity is selected in the Activity list box. Data for the following list boxes is automatically populated:

- Policy Number
- Sub-Policy number
- Effective Date

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Policy Master tables - your options ***(on page 100)***

For an explanation of Master Policy tables.

- Policy activities - your options ***(on page 110)***

For an explanation of Policy Activities tables

Setting up other activity rules (optional)

You can also establish rules for other activities that take place during a working day. You can decide if your employees will have to punch the clock for the following activities:

- Breaks 1 and 2
- Meal break

If the Policy Activities table (PT2SCR) is not displayed, you must complete Setting up activity rules for shift start and end.

1. Access the Policy Activities table (PT2SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Policy Activities

For practice, access the Policy Activities table (PT2SCR).

If you selected the Next Activity check box on the Policy Activities table (PT2SCR) in Creating a Policy Table, the Policy Activities table will be displayed.

The first three list boxes on the Policy Activities table will contain the values you entered on the Policy Master table. In addition, the next activity will be displayed in the Activities list box.

2. Select an activity

The options is this list box are:

- Break 1Start
- Break 2 Start
- Clock-In
- Meal Start

If you selected the 'Next Activity' check box in Task 1 the activity type 'Break 1 Start' is already selected for you. If you want to create an activity for a meal break, you would select the Meal Start activity.

For practice, select 'Meal Start'.

3. Select a Punch Type

This list box is used to determine if an employee will have to clock-in and out for the activity. The options are:

- None
- Need Not Punch
- Optional Minimum
- Optional Punch
- Required Minimum
- Required Punch

For practice, select 'Optional Minimum'.

If 'Optional Minimum' is selected in the Punch Type list box employees have the option to clock in and out. However a minimum of 30 minutes is always docked. If an employee has clocked in for the meal break and takes longer than the 30 minutes, the employee is docked for each additional minute.

4. Select the Paid check box

This check box is used to determine if the activity is paid or unpaid. If the activity is paid you must select this check box.

For practice, do not select this check box. As the activity is an unpaid break you would not select the Paid check box.

5. Enter the Start Time

Enter the Start Time for the 'Meal Start' activity.

Use 24-hour military time. For example, to enter a time for midnight you would enter 00:00. To enter a time for four thirty in the afternoon you would enter 16:30. Entries must be in sequential order but do not have to correspond to an actual shift start.

For practice, type '12:00'.

6. Enter the Length

Enter the length of time the employee is allowed for the activity.

For practice, type '00:30'.

7. Enter Hours Paid

Enter the total number of hours that will be paid for this activity.

For practice, type '00:00'.

In this example, the meal break is unpaid so you would enter '00:00'. The system establishes the 'Meal End (5)' activity by adding 'Start Time', and activity 'Length'. In this example, the 'Meal End (5)' activity time is 12:30 (12:00 plus 00:30)

8. Enter the Round and Grace time for Start Early

Enter the Round and Grace time for the condition 'Start Early'.

For practice, type '01' in the Round text box, and '01' minutes in the Grace text box.

9. Enter the Warning and Reject time for Start Early

Enter the Warning and Reject times for the condition 'Start Early'.

For practice, type '12:00' in the Warning text box, and '11:59' in the Reject text box.

In this example, your organization will be warned if employees start their break before 12:00. Employees are not allowed to clock in before 11:59.

10. Enter the Round and Grace time for Start Late

Enter the Round and Grace time for the condition 'Start Late'.

For practice, type '01' in the Round text box, and '01' minutes in the Grace text box.

11. Enter the Warning and Reject time for Start Late

Enter the Warning and Reject times for the condition 'Start Late'.

For practice, type '13:30' in the Warning text box, and '13:31' in the Reject text box.

In this example, your organization will be warned if employees start their break after 13:30. Employees are not allowed to start breaks after 13:31.

12. Enter the Round and Grace time for End Early

Enter the Round and Grace time for the condition 'End Early'.

For practice, type '01' in the Round text box, and '01' minute in the Grace text box.

13. Enter the Warning and Reject time for End Early

Enter the Warning and Reject times for the condition 'End Early'.

For practice, type '12:30' in the Warning text box, and '12:15' in the Reject text box.

In this example, your organization will be warned if employees end their breaks before 12:30. Employees are not allowed to end breaks before 12:15.

14. Enter the Round and Grace time for End Late

Enter the Round and Grace time for the condition 'End Late'.

For practice, type '01' in the Round text box, and '01' minutes in the Grace text box.

For example, if an employee wants to take a 30-minute meal break between 12:00 and 14:00, that employee must end the meal break by 13:59. If the employee's meal break ends after 13:59, the system will create a warning message. If the meal break ends after 14:00, a reject error will be created.

15. Enter the Warning and Reject time for End Late

Enter the Warning and Reject times for the condition 'End Late'.

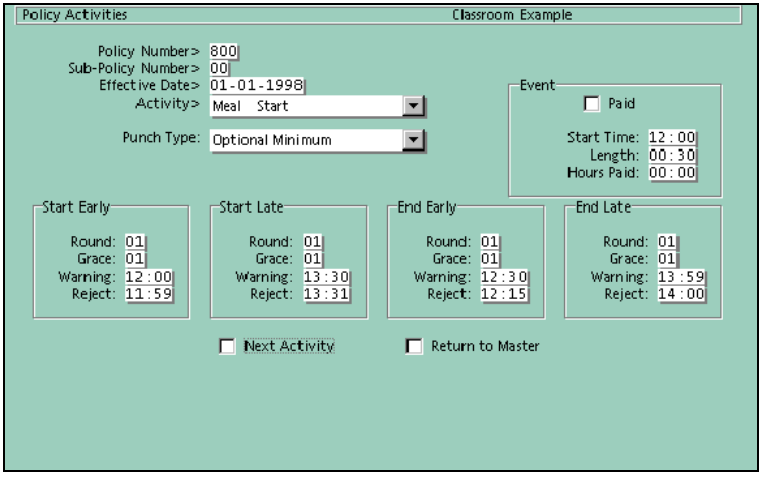
For practice, type '13:59' in the Warning text box, and '14:00' in the Reject text box.

In this example, your organization will be warned if employees end their breaks after 13:59. Employees are not allowed to end breaks after 14:00.

16. Select the Next Activity check box (optional)

If you intend to establish other rules for other activities select this check box.

For practice, ensure the 'Next Activity' check box is not selected.



17. Click Save or press Enter

Your Policy Activity table (PT2SCR) is saved.

For practice, click Save or press Enter.

If you selected the Next Activity check box, the form is refreshed, and the next activity is selected in the Activity list box. Data for the following list boxes is automatically populated:

- Policy Number
- Sub-Policy number
- Effective Date

See also:

- Policy Master tables - your options ***(on page 100)***

For an explanation of Master Policy tables.

- Policy activities - your options ***(on page 110)***

For an explanation of Policy Activities tables.

Establishing a One Time Grace Period (optional)

An optional One Time Grace Period can be set up to function only from the start or end of an activity.

When this feature is enabled, an employee's time is rounded to the nearest interval of Round if a clock transaction (ring) time is outside the One Time Grace Period. If the clock transaction (ring) time is within the One Time Grace Period, the time is rounded to the activity start time or end time.

Note: If clock transactions (rings) are either created, or edited on the Error Correction form (TAESCR), the One Time Grace Period rules are not used. The employee's time is rounded to the nearest interval of Round.

One Time Grace Periods can be created for all activities or just for the activity of clocking in and out at the start and end of a day.

In this task create a One Time Grace Period for the following example.

- Shift start time is 07:00 and end time is 15:30.
- Overtime is credited for clock transactions (rings) at, or before 06:30. Overtime is also credited for clock transactions (rings) at, or after 15:30. Overtime it rounded to the nearest quarter.
- Employees' clock-in times are rounded forward to 07:00 if they clock in anytime from 06:31 to 07:00. Their clock out times are rounded back to 15:00, if they clock out from 15:00 to 15:30.

1. Access the Policy Master table (PT1SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Policy Master

For practice, access the Policy Master table (PT1SCR).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Policy Number

Enter a three-character alphanumeric Policy Number.

For practice, type '700'.

4. Enter a Sub-Policy Number

Enter a two-character numeric Sub-Policy Number.

For practice, type '00'.

5. Enter an Effective Date

Enter an effective date for the policy. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-01-1998'.

6. Enter a description

Enter a brief description of the policy.

For practice, type 'One Time Grace Period Example'.

7. Enter a Default HED

Enter a default HED number for this policy. This is normally '001' for regular pay.

For practice, type '001'.

8. Enter a Deduct Minimum

This is the number of hours in a day that have to be worked before an automatic meal deduction is made.

Note: If you enter a value in this text box the Punch Type text box on the Policy Activities table (PT2SCR) must contain one of the following entries, so that the automatic deduction can be taken.

- Optional Minimum
- Required Minimum
- No Punch Needed

For practice, type '5.0'.

9. Select a Round Routine

In the Round Routine list box select which One Time Grace Period type you are going to use. The choices are:

- One Time Grace 1 & 8 Only. (A One Time Grace Period will be applied for 'Clock In 1' and 'Clock Out 8').
- On Time Grace All. (A One Time Grace Period will be applied for all activities).

For practice, select '1 Time Grace 1&8 Only'.

10. Enter a Calendar Routine

Enter a two-character Calendar Routine identifier.

A Calendar Routine is defined in the following forms:

- Holiday Assignment
- Type of Day Assignment
- Type of Holiday

For practice, type '10'.

11. Enter an Earning Code

Enter a four-character Earnings Code identifier. The Earnings Code identifiers are defined on the Earnings Code table (EC-SCR).

For practice, type 'E999'.

12. Enter a Shift Premium (optional)

If applicable, enter a four-character Shift Premium identifier. A Shift Premium identifier is defined on the Shift Premium table (SP-SCR).

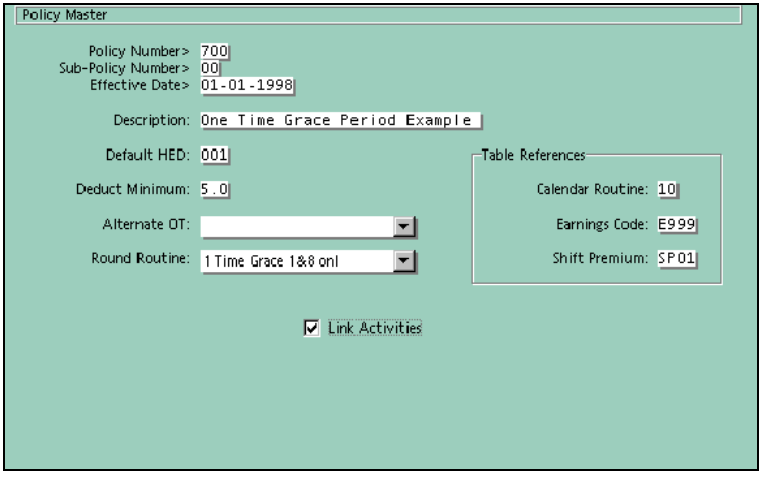
For practice, type 'SP01'.

13. Select the Link Activities check box (optional)

If you select the Link Activities check box, the Policy Activities table (PT2SCR) will appear when you click Save.

The first three list boxes on the linked Policy Activities table (PT2SCR) will contain the values that you have entered on this form.

For practice, select the 'Link Activities' check box.



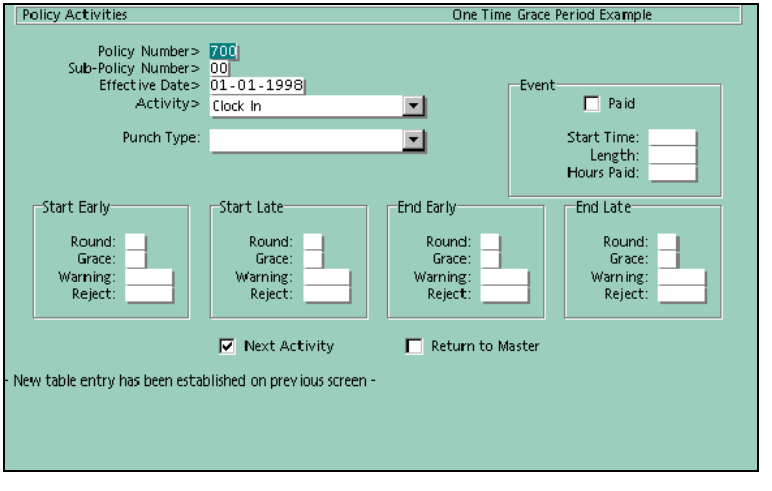
14. Click Save or press Enter

Your Policy Master table (PT1SCR) is saved and the following message is saved and the following message is displayed:

'New table entry has been established on previous form'.

For practice, click Save or press Enter.

Because you selected the Link Activities check box, the Policy Activities table (PT2SCR) appears:



15. Select a Punch Type

Leave this list box blank. This activity is mandatory so the system assumes that your employees must always clock-in and out.

For practice, do not select this check box.

16. Select the Paid check box

Select the Paid check box. This indicates that the activity 'Clock In' is a paid activity.

Note: An Unpaid activity is generally a meal break or rest break.

For practice, select the 'Paid' check box.

17. Enter the Start Time

Enter the Start Time for the 'Clock-In' activity.

Use 24-hour military time. For example, to enter a time for midnight you would enter 00:00. To enter a time for four thirty in the afternoon you would enter 16:30. Entries must be in sequential order but do not have to correspond to an actual shift start.

For practice, type '07:00'.

18. Enter the Length

Because the activity is 'Clock-In', the entry here is the total hours in a day the employee is present at work. This total includes meals, breaks, and other events that may be docked from the total time paid.

For practice, type '08:30'.

19. Enter the Hours Paid

Enter the total number of hours that will be paid for this activity.

For practice, type '08:00'.

In this example, the length of the event is '08:30' for a day, but there is an unpaid lunch break of 30 minutes. Therefore the 'Hours Paid' must equal '08:00'.

20. Enter the Round and Grace time for Start Early

Enter the Round and Grace time for the condition 'Start Early'.

For practice, type '15' in the Round text box, and '30' minutes in the Grace text box.

21. Enter the Warning and Reject time for Start Early

Enter the Warning and Reject times for the condition 'Start Early'.

For practice, type '06:31' in the Warning text box, and '06:30' in the Reject text box.

22. Enter the Round and Grace time for Start Late

Enter the Round and Grace time for the condition 'Start Late'.

For practice, type '15' in the Round text box, and '05' minutes in the Grace text box.

23. Enter the Warning and Reject time for Start Late

Enter the Warning and Reject times for the condition 'Start Late'.

For practice, type '07:45' in the Warning text box, and '08:00' in the Reject text box.

24. Enter the Round and Grace time for End Early

Enter the Round and Grace time for the condition 'End Early'.

For practice, type '15' in the Round text box, and '01' minute in the Grace text box.

25. Enter the Warning and Reject time for End Early

Enter the Warning and Reject times for the condition 'End Early'.

For practice, type '15:30' in the Warning text box, and '15:00' in the Reject text box.

26. Enter the Round and Grace time for End Late

Enter the Round and Grace time for the condition 'End Late'.

For practice, type '15' in the Round text box, and '30' minutes in the Grace text box.

27. Enter the Warning and Reject time for End Late

Enter the Warning and Reject times for the condition 'End Late'.

For practice, type '15:59' in the Warning text box, and '15:59' in the Reject text box.

28. Select the Next Activity check box

If you intend to establish other rules for other activities such as breaks and meals, select this check box.

For practice, ensure the 'Next Activity' check box is not selected.

29. Click Save or press Enter

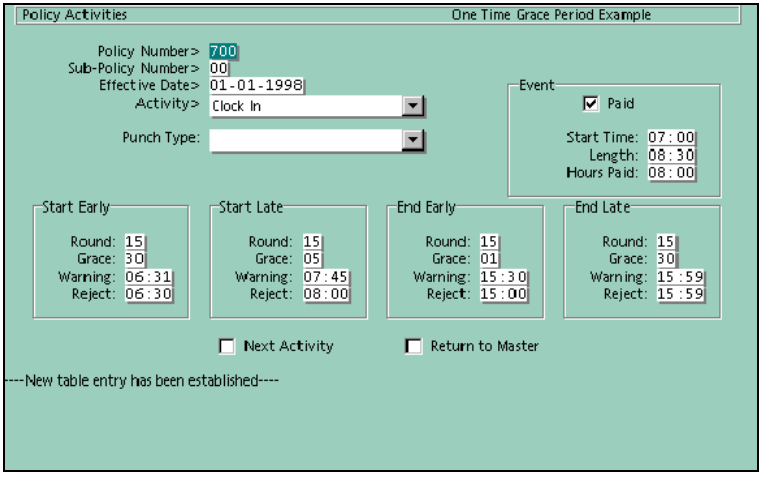
Your Policy Activity table (PT2SCR) is saved.

For practice, click Save or press Enter.

The following message is displayed:

'New table entry has been established'.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Round Routines and their impact *(on page 102)*

For an explanation of Policy Activities tables.

- Using One Time Grace Period Round Routine options *(on page 109)*

For an explanation of Policy Activities tables.

- Understanding Warning and Reject *(on page 114)*

For an explanation of warnings and reject times.

Copying Policy Master tables

Policies frequently are the same for several groups of employees in an organization or in different organizations. The Policy table Copy Utility form (PTRSCR) is used to copy the information from one policy to a newly created policy. The new policy can be for the same organization, or for different organizations.

1. Access the Policy table Copy Utility form (PTRSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Copy Policy Tables

For practice, access the Policy table Copy Utility form (PTRSCR).

2. Enter an organization

Enter an organization number for the existing Policy Master table (PT1SCR) you want to copy.

For practice, enter the organization number '999999'.

3. Enter the Policy Number

Enter the existing Policy Number that you want to copy.

For practice, type the Policy Number '800'.

4. Enter the Sub-Policy Number

Enter the existing Sub-Policy number.

For practice, type the Sub-Policy number '00'.

5. Enter the Effective Date

Enter the effective date of the policy you want to copy. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-01-1998'.

6. Enter an organization

Enter an organization number for which you want to create the new policy. This can be the same organization as the existing policy or a new organization.

For practice, type the organization number '999999'.

7. Enter a Policy Number

Enter a Policy Number for the policy you want to create.

For practice, type '600'.

8. Enter the Sub-Policy Number

Enter the Sub-Policy number for the new policy.

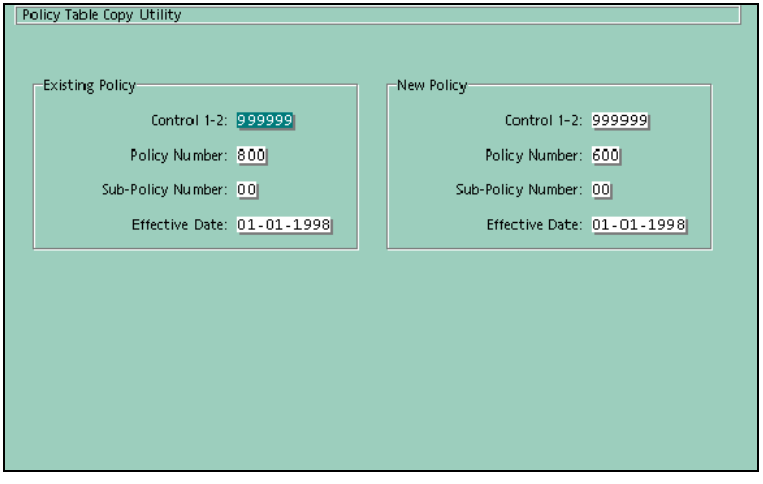
For practice, type the Sub-Policy number '00'.

9. Enter the Effective Date

Enter the effective date for the new policy you want to copy. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-01-1998'.

If you completed the Guided Practice, the results should look similar to the example that follows:



10. Click Save or press Enter

The Policy Master table (PT1SCR) appears for your new Master Policy table.

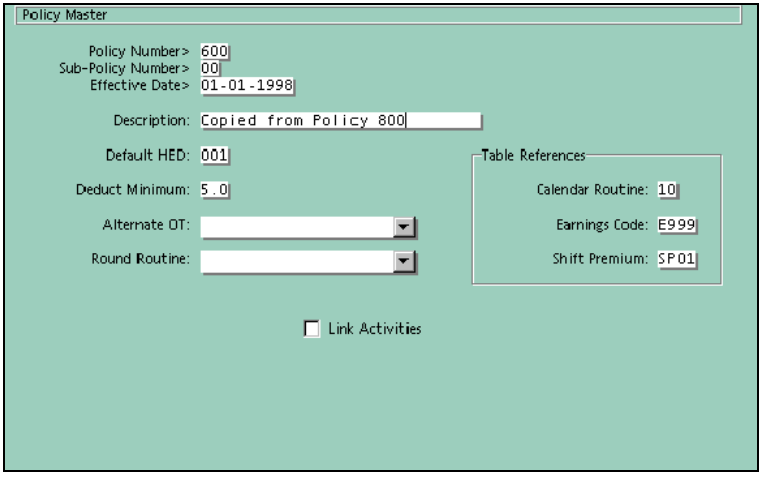
For practice, click Save or press Enter.

11. Edit the new Policy Master table (optional)

You can edit the new Policy Master table (PT1SCR) and change the text boxes to meet your requirements.

For practice, edit the Description and type 'Copied from Policy 800'.

If you completed the Guided Practice, the results should look similar to the example that follows:



12. Click Save or press Enter

The Policy Master table is saved.

For practice, click Save or press Enter.

See also:

- Policy Master tables - your options ***(on page 100)***

For an explanation of Master Policy tables.

Deleting Policy tables

To delete either a Policy Master (PT1SCR) or Policy Activities (PT2SCR) table follow these steps:

Note: If a Policy Master table has Schedule tables associated with it you will not be able to delete it. All Schedule tables associated with the Policy Master table must be deleted first.

Refer to Setting up Your Schedules for information on how to delete Schedule tables.

1. Access a Policy table

Access either the Policy Master table (PT1SCR) or Policy Activities table (PT2SCR) by selecting one of the following navigator options:

- Access the Policy Master table (PT1SCR) by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Policy Master

- Access the Policy Activity form (PT2SCR) by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Policy Activities

For practice, access a Policy table.

2. Select a Policy table

Access the message area using the Selections button on the toolbar.

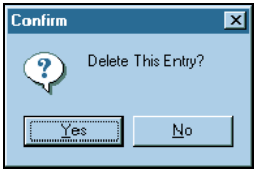
Select a Policy table by double-clicking on an entry.

For practice, double click on a Policy table in the message area.

3. Delete a Policy table

Delete this table using the Del Entry button on the toolbar.

For practice click on the Del Entry button on the toolbar.



For practice, select this navigator option.

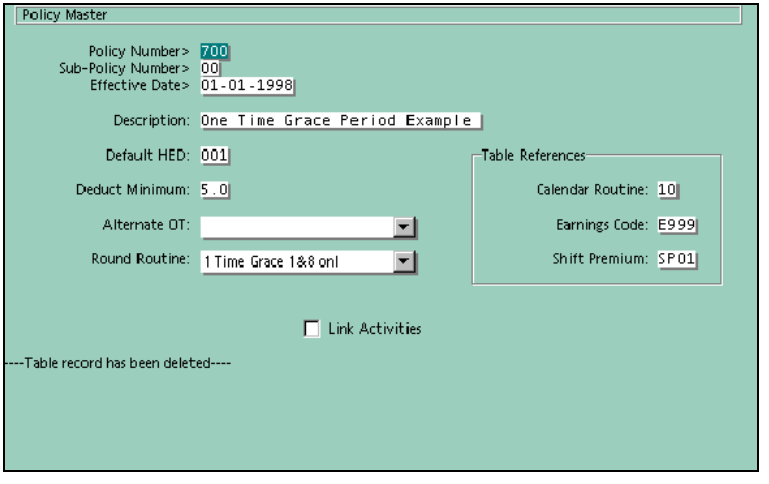
4. Click on the Yes button

The table will be deleted and the following message will appear:

'—Table Record has been deleted on previous form—'.

For practice, click on Yes.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

■ What are policy tables? ***(on page 99)***

For more information on Policy tables.

Review of Questions Answered

1. Why use Deduct Minimum?

2. Why are Punch Types used?

3. How are Grace and Round times used?

4. What is a One Time Grace Period?

5. How are Warnings and Rejects times used?

CHAPTER 6

Setting up Schedules

In This Chapter

Introduction

In this section the tasks needed to create Schedule tables are discussed. Schedule tables consist of a Schedule Master table and one or more Schedule Activities tables.

The Schedule Master table (ST1SCR) is used to associate schedules with a Policy Master table (PT1SCR) and its Policy Activities table (PT2SCR).

A Schedule Master table (ST1SCR) contains the same values that are defined on the Policy Master table, but these generic values can be overridden. In doing so, you can create unique Schedule Master tables for specific employees or groups of employees. A Schedule Master table (ST1SCR) uses the generic Policy Activities table. These generic tables can be overridden by creating Schedule Activities tables.

Schedule Activities table (ST2SCR) are optional. They are linked to Schedule Master table (ST1SCR) and are based on the associated Policy Activities table (PT2SCR). They are set up only when you need to override the generic values of a Policy Activities table. For example, Schedule Activities table can be created so that you can have unique activities for specific employees or groups of employees.

Tasks

The following tasks are discussed in this section:

- Setting up Schedule Master tables
- Entering override values on a Schedule Activities table
- Checking the override values of a Schedule Activities table
- Deleting Schedule tables

Prerequisites

Before you can begin to set up Time and Attendance Schedule tables, you must ensure that the Time and Attendance implementation tasks have been completed. You must also ensure that you have created the Policy tables for your organization.

☞ *Refer to* **Implementing Time and Attendance Administration** *(on page 57) for details about the implementation tasks.*

☞ *Refer to* **Setting Up Time and Attendance Policies** *(on page 97) for information on Policy tables.*

Questions answered

The following questions are answered in this section:

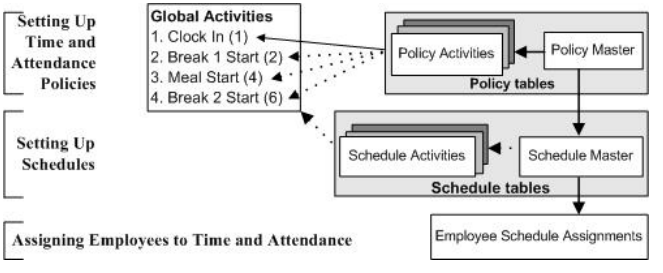
1. What are Schedule tables and are how are they used?
2. How are Schedule Master tables used?
3. How are Policy Activities and Schedule Activities tables associated?
4. Why is a naming convention needed for Schedule tables?
5. What impact does changing a Schedule Activities Start Time have on Warning and Reject times?

Policy and Schedule tables

A Schedule Master table (ST1SCR) is used to associate schedules with a Policy table (PT2SCR). Policy tables are the highest-level tables and are used to record the generic (or master) rules for a company or group of employees. These include your organization's rules relating to working time procedures, such as clocking in and out, docking for lateness, and overtime. A Schedule Master table (ST1SCR) contains Policy Master table values.

When you have created Policy and Schedule tables, employees are then assigned to Schedule tables using the Schedule Assignments form (TASSCR).

For a more detailed explanation of each table, refer to the section indicated in the diagram:



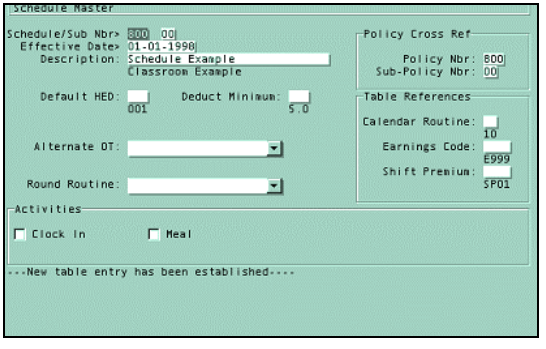
Schedule Master tables

You must establish at least one Schedule Master table (ST1SCR) for each Policy Master table (PT1SCR) you create. Schedule Master tables may be built for individual employees or groups of employees.

The values in the Policy Master table (PT1SCR) are copied to the Schedule Master table (ST1SCR). These values are shown next to the text boxes on the Schedule Master table. If you need to override one of these values, you must enter the override value in the appropriate text box.

For example, in a Schedule Master table (ST1SCR) you can enter a different effective date and cross reference to a Calendar Routine, Earning Code and Shift Premium.

The following example shows the table references for a Schedule Master. The Policy Master values are shown below the text boxes. If you wanted to override a value, you would enter the new value in the text box.



In this example of a Schedule Master table, the Earnings Code value has been overridden. The new value is shown in the text box and the original value is shown below the text box.

Schedule Activities table

The Schedule Master table (ST1SCR) is associated with the Policy Master table (PT1SCR) and its Policy Activities table (PT2SCR). If you need to override any of the values held on the Policy Activities table (PT2SCR), you must create Schedule Activities table (ST2SCR).

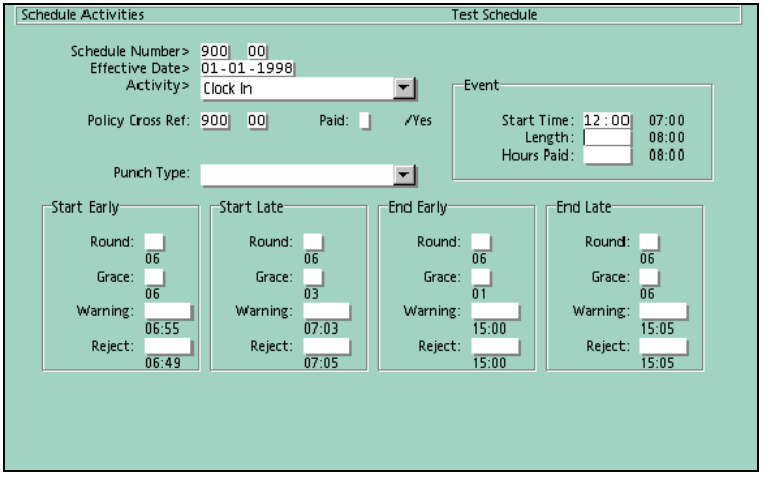
Only override values are entered on the Schedule Activities form (ST2SCR).

Note: *Corresponding Policy Master and Schedule Master forms must exist before Schedule activity records can be created.*

The Schedule Activities form (ST2SCR) may display two sets of values:

- The values originally entered on the Policy Activities table appear in Inquiry Mode next to the text boxes.
- Override values appear within the text boxes once they are entered into the text boxes.

In this example, the Start Time has been overridden. The new value is shown in the text box and the original value is shown to the right of the text box.



A Schedule Activities table (ST2SCR) has six required text boxes. When you access a Schedule Activities table, these text boxes are populated with the values held in the Schedule Master table (ST1SCR). These text boxes are:

- Schedule Number
- Sub-Schedule Number
- Effective Date
- Activity type
- Policy Number
- Sub-Policy Number

Naming conventions for Schedules tables

The Schedule and Sub-Schedule Numbers on the Schedule Master table (ST1SCR) are used to name the schedules to which employees are attached. Alphanumeric values are used in the Schedule Number text box and numeric values in the Sub-Schedule Number text box.

Schedules and Crew Rotations

If you are planning to use the Crew Rotation Facility for automatic scheduling of rotating shifts, careful planning of Schedule table names is necessary. Crew Rotations are used by the Time and Attendance system to assign specific employees to various Schedule tables, according to a specified pattern. In order to easily recall the types of schedules to which your employees are assigned, your schedule names can imply some type of meaning.

For example, a Schedule Number can represent a group of employees associated with a Schedule Master table (ST1SCR). The Sub-Schedule Numbers can represent the different shifts within the same Schedule Master table (ST1SCR). The following table contains a simple example of a naming convention.

Schedule Number	Sub-Schedule Number	Description
800	01	1st Shift
800	02	2nd Shift
800	00	3rd Day—off

Your Time and Attendance rules must reflect the time that your organization is in operation. You need to ensure that you have the correct number of employees in attendance throughout this time period. To achieve this, you can rotate groups of employees from one schedule to another, according to a predefined pattern of scheduled days on and off.

Sub-Schedule Numbers

Any numeric value may be used. However, Cyborg suggests using the value of 00 or 99 to represent a scheduled day-off shift. Typical table Sub-Schedule Number values may be 01 for 1st shift, 02 for second shift, and 00 for a scheduled day off.

If your organization does not pay any additional amounts for when employees work a scheduled day off, the Sub-Schedule '00' does not need to contain any rules different from the other Sub-Schedules.

Example of a naming convention

The following Schedule table (ST2SCR) examples are for two shift maintenance crews. The Schedule Number is the same for all shifts, while the Sub-Schedule Numbers are used to represent the change within the Schedule. In this example, a Schedule table has been created for 'Scheduled Days Off', as this organization makes additional payments to employees working on a scheduled day off.

In this example, Schedule Number 'MTC' is used to represent the 'Maintenance' shift. Sub-Schedule numbers '01' and '02' are used to represent first and second shifts. The Description text box is used as a means of recording this naming convention.

Text box	Entry
Schedule Number	MTC
Sub-Schedule Number	01
Effective Date	01-01-94
Description	Maintenance 1st Shift, 08:00—20:00
Policy Number	730
Sub-Policy Number	01

Two other tables are created for the second shift rules and day-off rules. The differences are defined in the Sub-Schedule Number and Description text boxes.

Text box	Entry
Schedule Number	MTC
Sub-Schedule Number	02
Effective Date	01-01-94
Description	Maintenance 2nd Shift, 20:00—08:00
Policy Number	730
Sub-Policy Number	01

Text box	Entry
Schedule Number	MTC
Sub-Schedule Number	00
Effective Date	01-01-94
Description	Maintenance Day-off Schedule
Policy Number	730
Sub-Policy Number	01

Apply the Concept
Determine what naming convention your organization could use to name the different Schedules.

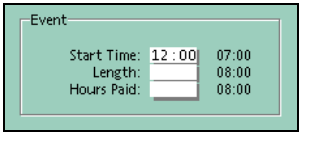
Overriding the Start Time for a Schedule activity

On a Schedule Activities table you can override the Start Time for an activity.

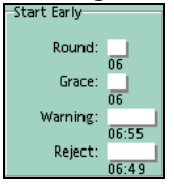
If you enter a new Start Time for an activity, the system automatically applies changes to the Warning and Reject text boxes based on the original values on the Policy Activities table (PT2SCR).

The form does not automatically update the values to reflect the impact of the new Start Time. To view these values you will have to save the changes you make to the Schedule Activities table and access the table again.

In the following example, the Start Time is advanced by four hours to 12:00. When the table is saved, the Warning and Reject times will also increase by five hours.



Existing values **New values, increased by five hours**



Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

You must have completed the Guided Practices in the prior sections to guarantee the successful completion of the Guided Practice that follows. You are going to create a Schedule Master table (ST1SCR) and associate it with the Policy Master table (PT1SCR) you created in Setting Up Time and Attendance Policies.

Tasks

Setting up Schedule Master tables

You must establish at least one Schedule Master table (ST1SCR) for each Policy Master table (PT1SCR) you have created.

Note: The values for the Policy Master table (PT1SCR) are copied to the Schedule Master table (ST1SCR). They are shown next to text boxes on the Schedule Master table. If you need to override one of these values, you must enter the override value in the appropriate text box.

1. Access the Schedule Master table (ST1SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Schedule Master

For practice, access the Schedule Master table (ST1SCR).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Schedule Number

Enter a three-character alphanumeric Schedule Number.

For practice, type '800'.

4. Enter a Sub-Schedule Number

Enter a two-character numeric Sub-Schedule Number.

For practice, type '00'.

5. Enter an Effective Date

Enter an effective date for the schedule. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

Note: This date defines the earliest date that this Schedule Master table will become activated. This date may not be earlier than the Effective Date on the Policy Master table (PT1SCR).

For practice, type '01-01-1998'.

6. Enter a Description

Enter a brief description of the schedule.

For practice, type 'Schedule Example'.

7. Enter a Policy Number

Enter a Policy Number to which you want this schedule to be cross-referenced. Policy Numbers are entered as a three-character alphanumeric.

For practice, type '800.

8. Enter a Sub-Policy Number

Enter a Sub-Policy Number to which you want this schedule to be cross- referenced. Sub-Policy Numbers are entered as a two-character numeric value.

For practice, type '00'.

9. Enter a Default HED (optional override)

The Default HED number defined in the Policy Master table is displayed below this text box. To override this value, enter a default HED number for this schedule.

For practice, leave this text box blank.

10. Enter a Deduct Minimum (optional override)

The number defined in the Policy Master table (PT1SCR) is displayed below this text box. To override the value for this schedule, enter the number of hours in a day that have to be worked before an automatic meal deduction is made.

Note: If you enter a value in this text box, the Punch Type text box on the Policy Activities form (PT2SCR) must contain one of the following entries so that the automatic deduction can be taken:

- Optional Minimum
- Required Minimum
- No Punch Needed

For practice, leave this text box blank.

11. Select an Alternate OT (Puerto Rico only) (optional override)

The number defined in the Policy Master table (PT1SCR) is displayed below this text box. To override the value for this schedule, select an alternate overtime.

Note: This step applies only to Puerto Rican Time and Attendance Administration users. Only the special Puerto Rican overtime rule is delivered in option list Overtime Indicator. The HED 011 is used as output.

For practice, leave this text box blank.

12. Select a Round Routine (optional override)

The number defined in the Policy Master table (PT1SCR) is displayed below this entry. To override the value for this schedule, select a Round Type.

This is a One Time Grace Period indicator for a schedule's activity. The options are:

- None
- 1 Time Grace 1&8 Only. This determines that a One Time Grace Period will be applied for Clocking in (1) and Clocking out (8)
- 1 Time Grace All. This determines that a One Time Grace Period will be applied for all activities
- Standard Round (Default). The standard Grace and Round rules will be used

For practice, leave this text box blank.

13. Enter a Calendar Routine (optional override)

The number defined in the Policy Master table (PT1SCR) is displayed below this text box. To override the value for this schedule, enter a two-character Calendar Routine identifier.

For practice, leave this text box blank.

14. Enter an Earnings Code (optional override)

The number defined in the Policy Master table (PT1SCR) is displayed below this text box. To override the value for this schedule, enter a four-character Earnings Code identifier. The Earnings Code identifiers are defined on the Earnings Code table (EC-SCR).

For practice, leave this text box blank.

15. Enter a Shift Premium (optional override)

The number defined in the Policy Master table is displayed below this text box. To override the value for this schedule, enter a four-character Shift Premium identifier. A Shift Premium identifier is defined on the Shift Premium table (SP-SCR).

For practice, leave this text box blank.

16. Select an Activity

To enter override values for an activity, select an Activities check box. When you click OK, the Schedule Activities table (ST2SCR) will be displayed containing the values for the first activity you selected.

For practice, do not select an Activities check box.

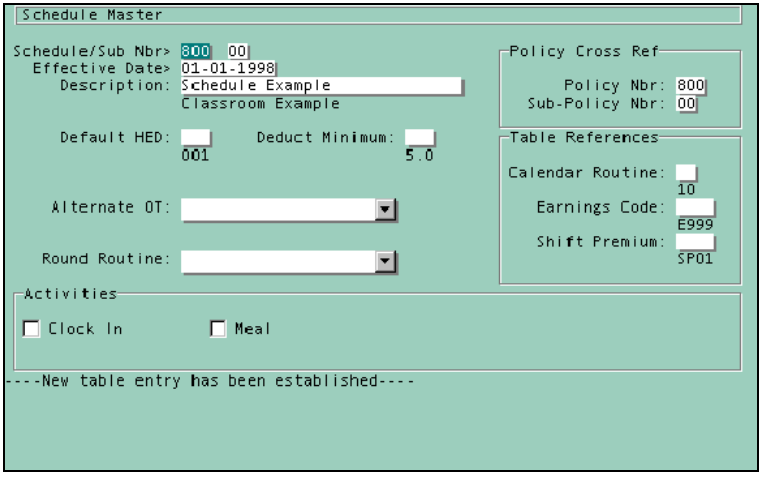
17. Click Save or press Enter

Your Schedule Master table is saved and the following message is displayed:

'—New table entry has been established—'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Policy and Schedule tables ***(on page 143)***

For an explanation of the relationship between Policy and Schedule tables.

- Schedule Master tables ***(on page 143)***

For an explanation of Schedule Master tables.

- Example of a naming convention ***(on page 146)***

For an explanation of what you need to consider when naming Schedule tables.

Entering override values on a Schedule Activities table (optional)

A Schedule Master table is cross-referenced to a Policy Master table. Any Policy Activities that were created for a Policy Master table (PT1SCR) will be used by the Schedule Master table (ST1SCR).

If you need to override the values in the associated Policy Activities table, you must complete the steps in this task. You cannot access a Schedule Activities table using the navigator options until you complete the steps in this task.

When you complete the steps in this task, you will create a Schedule Activities table (ST2SCR). This table is based on the associated Policy Activities table, but will contain the override values that you enter. Having completed the steps in this task, you will then be able to access the Schedule Activities table via the navigator options.

To create a Schedule Activities table (ST2SCR), access it using a Schedule Master table (ST1SCR).

Note: A Policy Master table (PT1SCR) and Schedule Master table (ST1SCR) that have been cross-referenced must exist before Schedule activity records can be created.

1. Access the Schedule Master table (ST1SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Schedule Master

For practice, access the Schedule Master table (ST1SCR).

2. Select a Schedule Master table

Access the message area using the Selections button on the toolbar

Select a Policy table by double-clicking on an entry.

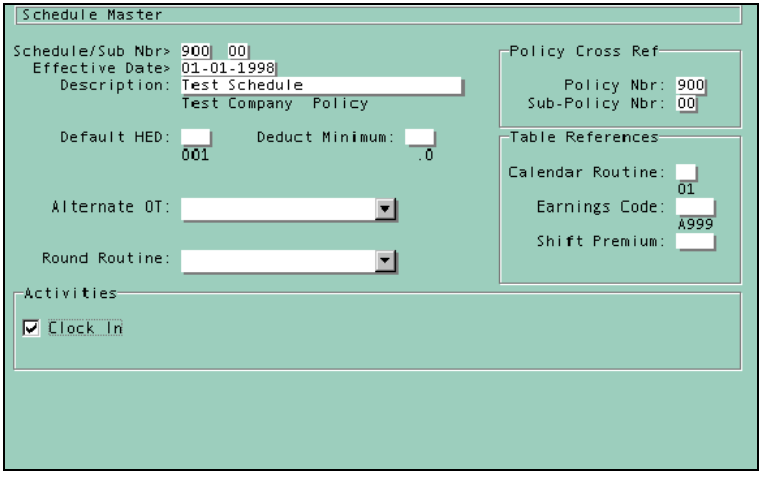
For practice, double click on Schedule Master table '900'.

Schedule Number	Sub-Schedule Number	Effective Date	Description	Policy	
800	03	01-01-1998	Crew Rotation - 3rd Shift	900	00
800	02	01-01-1998	Crew Rotation - 2nd Shift	900	00
800	01	01-01-1998	Crew Rotation - 1st Shift	900	00
900	00	01-01-1998	Test Schedule	900	00

3. Select an Activity

The Activities group box at the bottom of the Schedule Master table (ST1SCR) displays the activities that are associated with this schedule. Select the activity for which you want to enter override values.

For practice, select the activity 'Clock In'.



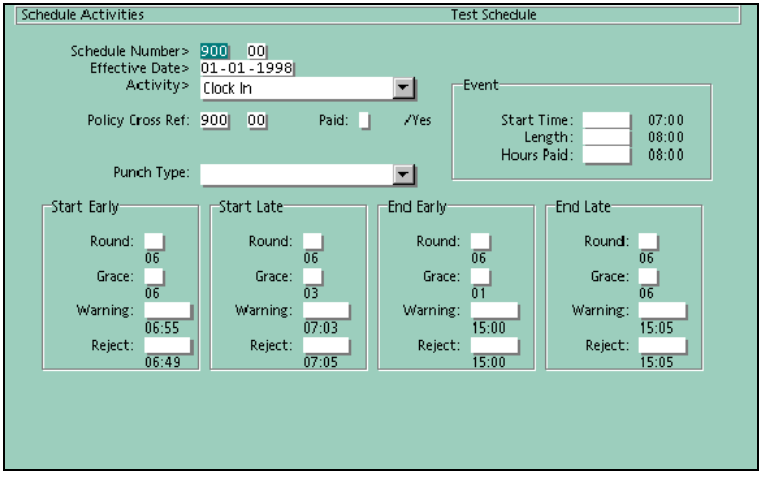
4. Click Save or press Enter

The Schedule Activities table (ST2SCR) will be displayed.

The following text boxes will contain data established on the Schedule Master table (ST1SCR):

- Schedule Number
- Sub-Schedule Number
- Effective Date
- Activity
- Policy Cross Ref

For practice, click Save or press Enter.



Now that you have created a Schedule Activities table (ST2SCR), you can enter override values.

Enter an override value for the activity 'Clock-In' by entering a different Start Time for this activity.

5. Select the Paid check box (optional override)

The selection defined in the Policy Activities table (PT2SCR) is displayed to the right of this entry text box (/Yes, /No). If '/Yes' is displayed, the activity is paid. To override the value for this schedule, enter either:

- Y for Yes
- N for No

Note: An Unpaid activity is generally a meal break or rest break.

For practice, leave this text box blank.

6. Select a Punch Type (optional override)

To override the value for this Schedule activity, select a different Punch Type.

Note: In this example, because Clock In is a mandatory activity, the system assumes that your employees must always clock in and out. For this type of activity, the system does not display an original value.

For practice, leave this text box blank.

7. Enter the Start Time (optional override)

To override the value for this Schedule activity, enter a different Start Time for the Clock-In activity, using 24-hour military time. The form does not automatically update the values

to reflect the impact of the new Start Time. To view these values you will have to save the changes you make to this form and access the table again.

By entering a new Start Time for an activity, the system automatically applies changes to the Warning and Reject text boxes based on the original values on the Policy Activities table.

For practice, type '12:00'.

8. Enter the Length of the activity (optional override)

To override the value for this Schedule activity, enter a different time length.

Because the activity is Clock In, this value must be the total number of hours in a day that the employee is present at work. This total includes meals, breaks, and other events that may be docked from the total time paid.

For practice, leave this text box blank.

9. Enter the number of Hours Paid for this activity (optional override)

To override the value for this Schedule activity, enter the total number of hours that will be paid for this activity.

For practice, leave this text box blank.

10. Enter the Round and Grace times for Start Early (optional override)

To override the values for this Schedule activity, enter different Round and Grace values.

Note: The Grace value must not be greater than the round value, except when utilizing the One Time Grace Period feature.

For practice, leave this text box blank.

11. Enter the Warning and Reject times for Start Early (optional override)

To override the values for this Schedule activity, enter different Warning and Reject times.

For practice, leave these text boxes blank. Because you entered a new Start Time in this task, the Warning and Reject times will change when the table is saved.

12. Enter the Round and Grace times for Start Late (optional override)

To override the values for this Schedule activity, enter different Round and Grace values.

For practice, leave this text box blank.

13. Enter the Warning and Reject times for Start Late (optional override)

To override the values for this Schedule activity, enter different Warning and Reject times.

For practice, leave these text boxes blank. Because you entered a new Start Time in this task, the Warning and Reject times will change when the table is saved.

14. Enter the Round and Grace times for End Early (optional override)

To override the values for this Schedule activity, enter different Round and Grace values.

For practice, leave these text boxes blank.

15. Enter the Warning and Reject times for End Early (optional override)

To override the values for this Schedule activity, enter different Warning and Reject times.

For practice, leave these text boxes blank. Because you entered a new Start Time in this task, the Warning and Reject times will change when the table is saved.

16. Enter the Round and Grace times for End Late (optional override)

To override the values for this Schedule activity, enter different Round and Grace values.

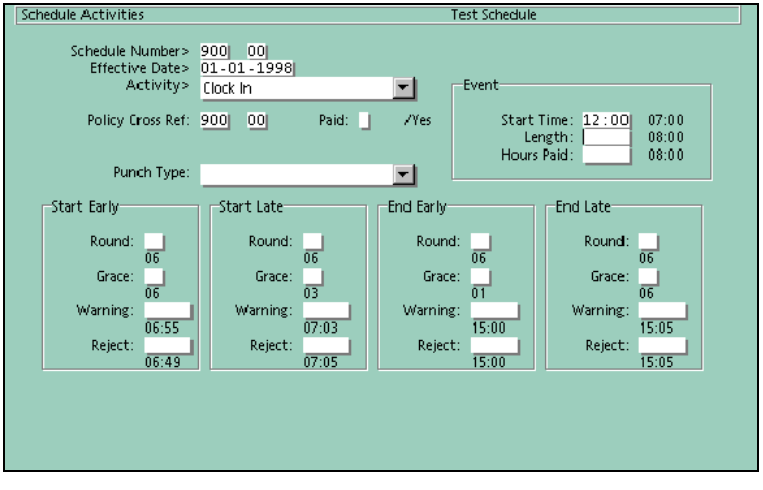
For practice, leave these text boxes blank.

17. Enter the Warning and Reject times for End Late (optional override)

To override the values for this Schedule activity, enter different Warning and Reject times.

For practice, leave these text boxes blank. Because you entered a new Start Time in this task, the Warning and Reject times will change when the table is saved.

If you completed the Guided Practice, the results should look similar to the example that follows:



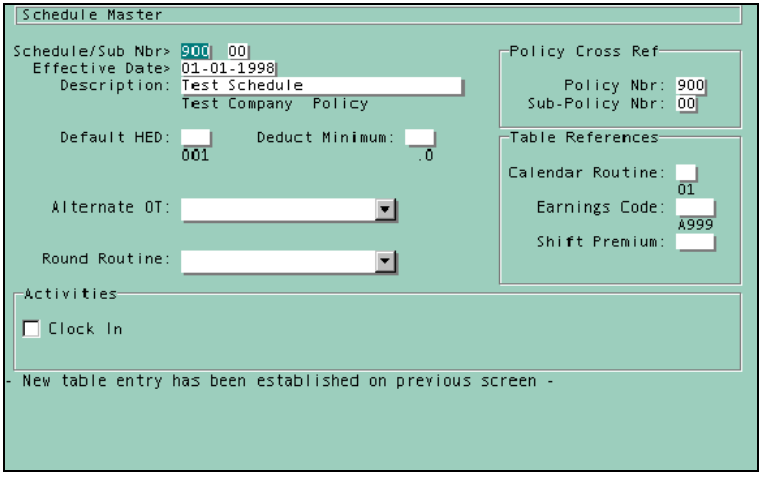
18. Click Save or press Enter

Your Schedule Activity table (ST2SCR) is saved. Since there were no other activities defined for this Policy, the Schedule Master form (ST1SCR) is displayed. The following message is displayed at the bottom of the form.

'New table entry has been established on previous form'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Refer to **Checking the override values of a Schedule Activities table** *(on page 159), for information on how to check the impact of the override values you entered in this task.*

See also:

- Policy and Schedule tables ***(on page 143)***

For an explanation of the relationship between Policy tables and Schedule tables.

- Schedule Master tables ***(on page 143)***

For an explanation of Schedule Master tables.

- Schedule Activities table ***(on page 144)***

For an explanation of Schedule Activities table.

- Overriding the Start Time for a Schedule activity ***(on page 149)***

For an explanation of how to enter override values on a Schedule Activities table.

Checking the override values of a Schedule Activities table

To check the accuracy of the override values for a Schedule Activities table, you need to access the Schedule Activities table (ST2SCR).

Note: Only Schedule Activities tables that contain override values can be accessed directly using the navigator options. If a Schedule Activities table (ST2SCR) does not contain override values, the generic Policy Activities table will be used.

Refer to **Entering override values on a Schedule Activities table (optional)** *(on page 153), for more information on how to access a Schedule Activities table (ST2SCR) and enter override values on it.*

1. Access the Schedule Activities table (ST2SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Schedule Activities

For practice, access the Schedule Activities table (ST2SCR).

2. Select a Schedule Activities table

Access the message area using the Selections button on the toolbar.

Select a Schedule Activities table by double-clicking on an entry.

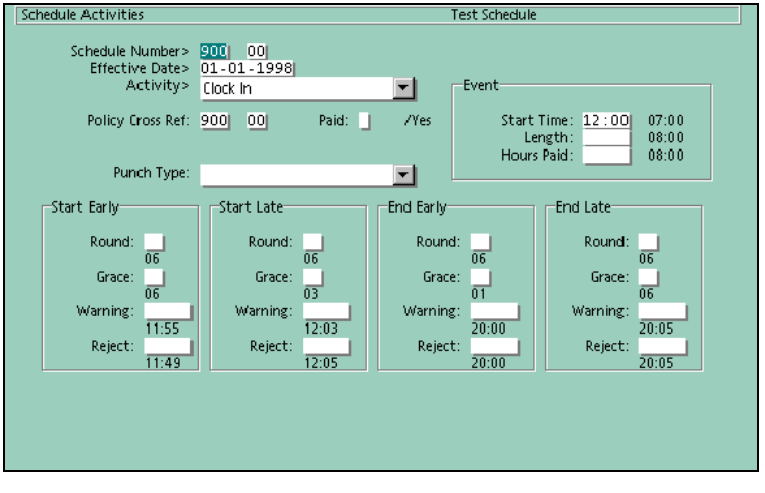
For practice, double click on Schedule Activities table '900' that has the activity 'Clock In'.

Schedule Number	Sub-Schedule Number	Effective Date	Activity	Description	Paid
800	03	01-01-1998	1 Clock In	Crew Rotation - 3rd Sh	
800	02	01-01-1998	1 Clock In	Crew Rotation - 2nd Sh	
800	01	01-01-1998	1 Clock In	Crew Rotation - 1st Sh	
900	00	01-01-1998	1 Clock In	Test Schedule	

3. Check the override values for this activity

In this example, the Start Time was increased by four hours. The Warning and Reject times have been automatically updated to reflect the new Start Time.

For practice, check the accuracy of the override value in the Start Time.



Note: *To check the override values for other activities, repeat steps 2 and 3.*

See also:

- Schedule Activities table ***(on page 144)***

For an explanation of Schedule Activities table.

- Overriding the Start Time for a Schedule activity ***(on page 149)***

For an explanation of how to enter override values on a Schedule Activities table.

Deleting Schedule tables

To delete a Schedule Master table (ST1SCR) or a Schedule Activities table (ST2SCR), follow these steps.

Note: If you delete a Schedule Master table you will also automatically delete any associated Schedule Activities table(s).

1. Access a Schedule table

Access either the Schedule Master table or Schedule Activities table by selecting one of the following navigator options:

- Use the Schedule Master table (ST1SCR) to delete a Schedule Master table and its associated Schedule Activities table (ST2SCR).

Component: Time and Attendance
Process: Set up TA Rules
Task: Schedule Master

- Use the Schedule Activities table (ST2SCR) to delete specific Schedule Activities table.

Component: Time and Attendance
Process: Set up TA Rules
Task: Schedule Activities

For practice, access a Schedule table.

2. Select a Schedule table

Access the message area using the Selections button on the toolbar.

Select the Schedule table you want to delete by double-clicking on an entry.

For practice, double click on a Schedule table.

3. Delete a Schedule table

Delete this table using the Del Entry button on the toolbar.

For practice click on the Del Entry button on the toolbar.

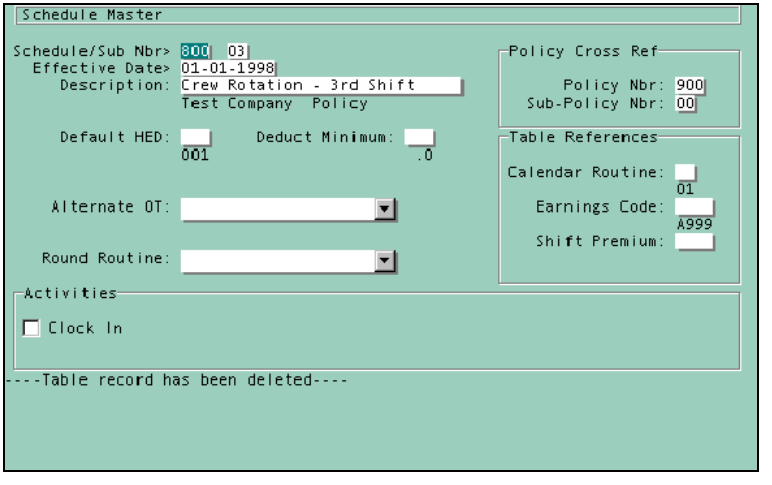
4. Click on the Yes button

The table will be deleted and the following message will appear:

'—Table record has been deleted—'.

For practice, click on the Yes button.

If you completed the Guided Practice, the results should look similar to the example that follows:



Checking the override values of a Schedule Activities table

To check the accuracy of the override values for a Schedule Activities table, you need to access the Schedule Activities table (ST2SCR).

Note: Only Schedule Activities tables that contain override values can be accessed directly using the navigator options. If a Schedule Activities table does not contain override values, the generic Policy Activities table will be used.

Refer to **Entering override values on a Schedule Activities table (optional)** *(on page 153), for more information on how to access a Schedule Activities table and enter override values on it.*

1. **Access the Schedule Activities table (ST2SCR)**
2. **Select a Schedule Activities table**
3. **Check the override values for this activity**

Review of Questions Answered

1. What are Schedule tables and how are they used?

2. How are Schedule Master tables used?

3. How can you associate Policy Activities tables and Schedule Activities tables?

4. Why do you need to create a naming convention for Schedule tables?

5. What impact does changing a Schedule Activities Start Time have on Warning and Reject times?

CHAPTER 7

Setting Up Rotation Patterns

In This Chapter

Introduction

Time and Attendance Administration crew rotation facility allows you to rotate employees through different schedule assignments (or shifts) according to a specified pattern. This facility will be especially helpful for organizations that have work patterns for groups of employees who do not work the same shift or who have unique pay rules for scheduled non-work days.

Tasks

This section explains how to do the following:

- Define Schedule Numbers
- Define rotation patterns of up to eight weeks
- Define rotation patterns of up to 14 weeks

Prerequisites

Before you can begin setting up your crew rotations, you must have set up your policies and schedules.

☞ *Refer to* **Setting Up Your Time and Attendance Policies** *(see "Setting Up Time and Attendance Policies" on page 97) and* **Setting Up Schedules** *(on page 141) for detailed information.*

Questions answered

The following questions are answered in this section:

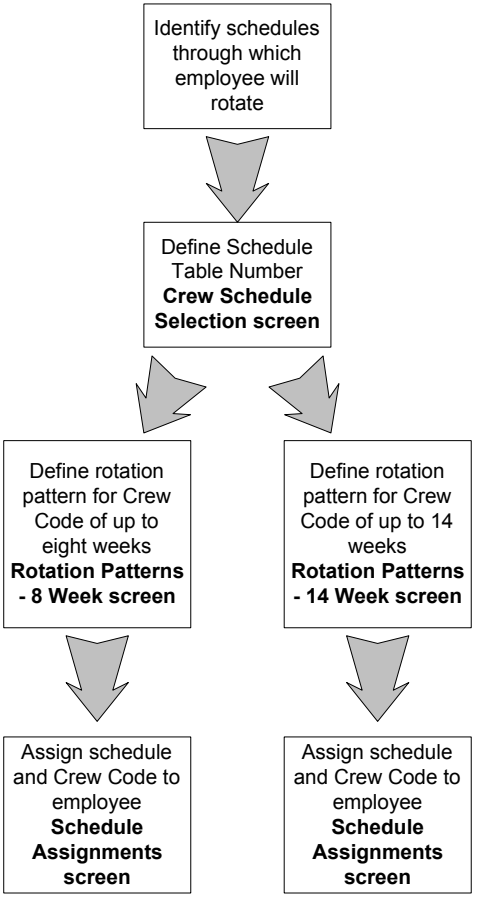
1. What are crew rotations and how do they work?
2. What are rotation patterns and how are they set up?
3. How do you schedule your employees to crew rotation patterns?
4. What online utilities and packaged reports are available for viewing and tracking your rotation patterns?

Understanding crew rotations

The crew rotation facility allows you to rotate employees through different schedule assignments (or shifts) according to a specified pattern. This pattern of employee schedule assignments makes up the employee's schedule. The word 'crew' represents a group of employees who rotate from one schedule assignment (shift) to another, following the rotation pattern. These crew rotations will be especially helpful for organizations that have work patterns for groups of employees who do not work the same shift or who have unique pay rules for scheduled non-work days.

Some organizations have two or three different shifts in a working day. In a given period, a crew can be assigned to rotate through each of the different shifts. A crew might work one shift for a week then work a different shift the following week. It is up to you to determine the crew rotation pattern through these shifts. The employee 'rotates' through the various shifts that define the pattern. A rotation pattern can span a maximum of 14 weeks before it begins to repeat.

Setting up crew rotations



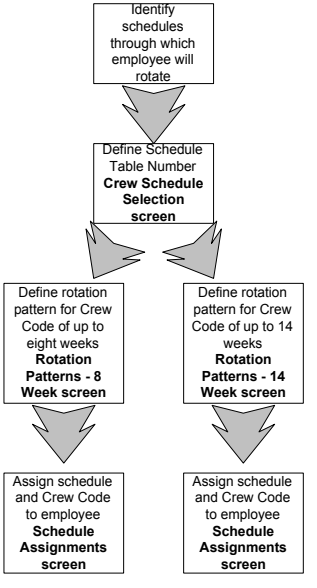
Setting up a crew rotation pattern involves the following steps:

1. Identify the various shifts the rotating employees will be working and one for off-days. Employees will rotate between shifts with different Sub-Schedule Numbers with the same Schedule Number.
2. Define the Schedule Number that is included in a rotation pattern on the Crew Schedule Selection form.
3. Define the rotation pattern on the Rotation Patterns - 8 Week form or Rotation Patterns - 14 Week form by entering a crew code and a Schedule Number's Sub-Schedule Numbers; the crew code is then tied to the Sub-Schedule Numbers.
4. Assign the schedule table number and crew code for the employee on the Schedule Assignments form.

After assigning the employee to the rotation pattern, the system automatically rotates the employee through the different shifts based on the Sub-Schedule Numbers.

Setting up a crew rotation pattern involves the following steps:

1. Identify the various shifts the rotating employees will be working and one for off-days. Employees will rotate between shifts with different Sub-Schedule Numbers with the same Schedule Number.
2. Define the Schedule Number that is included in a rotation pattern on the Crew Schedule Selection form.
3. Define the rotation pattern on the Rotation Patterns - 8 Week form or Rotation Patterns - 14 Week form by entering a crew code and a Schedule Number's Sub-Schedule Numbers; the crew code is then tied to the Sub-Schedule Numbers.
4. Assign the schedule table number and crew code for the employee on the Schedule Assignments form.

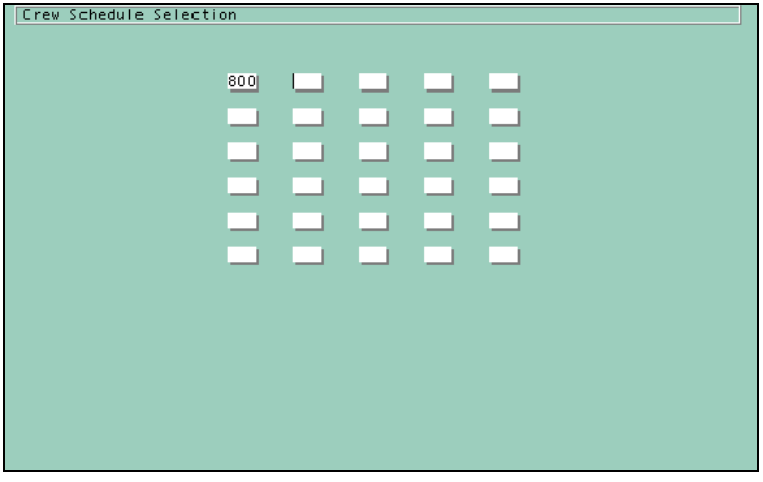


After assigning the employee to the rotation pattern, the system automatically rotates the employee through the different shifts based on the Sub-Schedule Numbers.

Use of the Crew Schedule Selection form

The Crew Schedule Selection form (CR1SCR) is used to identify all schedules used in a work rotation by the crews. The Schedule Number for each of these schedules is entered here. Up to 30 schedules may be entered for crew rotation.

Note: The schedules entered on the Crew Schedule Selection form (CR1SCR) can also be assigned to employees who are not in a crew.



Apply the Concept
How might you use crew rotations in your organization?

Understanding rotation patterns

A rotation pattern is the arrangement of various shifts to which an employee is assigned. Each shift is identified by a Sub-Schedule Number. The employee 'rotates' through the various shifts that define the pattern. A rotation pattern cannot be defined to span longer than 14 weeks before it begins to repeat.

The crew rotation pattern is defined by specifying Schedule Number and Sub-Schedule Numbers to represent the shifts in the pattern. A Schedule Number represents a group of employees associated with a schedule. Sub-Schedule Numbers represent different shifts within the same schedule. See the chart below for an example setup of Schedule and Sub-Schedule Numbers. Notice that the Sub-Schedule Numbers comprising the rotation pattern must share a common Schedule Number.

Schedule Number	Sub-Schedule Number	Description
120	01	1st Shift (06:00 - 18:00)
120	02	2nd Shift (18:00 - 06:00)
120	00	Off Day

Use of the Rotation Patterns - 8 Week form and Rotation Patterns - 14 Week form

These rotation pattern forms define the rotation pattern for each crew. The Rotation Patterns - 8 Week form (CR2SCR) allows you to define a crew rotation pattern of up to eight weeks while the Rotation Patterns - 14 Week form (CR3SCR) lets you define a rotation pattern of up to 14 weeks. You enter a schedule's Sub-Schedule Numbers for each day of the week's shift to define the rotation pattern for the crew. If the rotation pattern begins to repeat, a 'ZZ' is entered for that day/shift. The system will automatically populate 'ZZs' to all remaining text boxes. An example of rotation patterns for four groups of employees (crews) using the Rotation Patterns - 8 Week form (CR2SCR) is shown below.

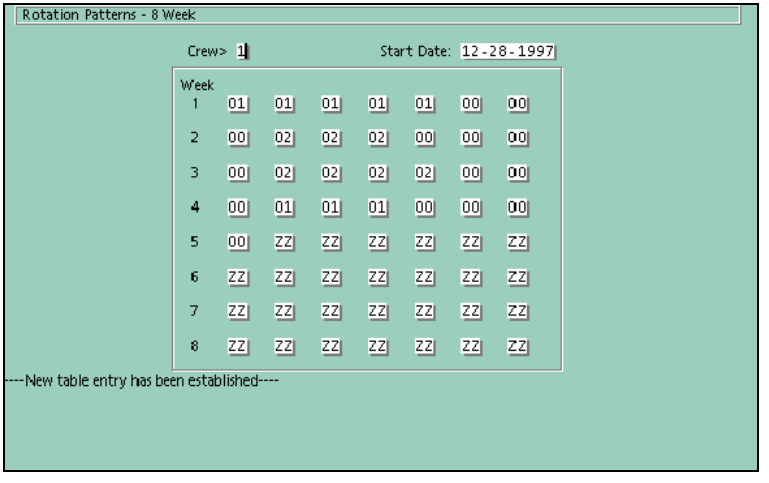
Crew 1

Based on the Sub-Schedule Numbers on this form, Crew 1 is assigned to work the:

- 1st Shift (Sub-Schedule Number 01) during Weeks 1 and 4
- 2nd Shift (Sub-Schedule Number 02) during Weeks 2 and 3

Notice the days off for which Crew 1 is scheduled (Sub-Schedule Number 00).

'ZZ' has been entered for all subsequent days/weeks to indicate the pattern begins to repeat as of Week 5, Day 2.



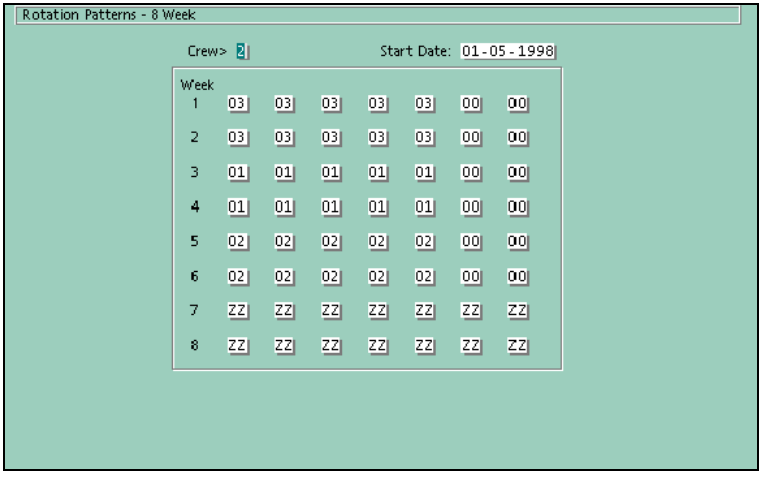
Crew 2

Based on the Sub-Schedule Numbers on this form, Crew 2 is assigned to work the:

- 1st Shift (Sub-Schedule Number 01) during Weeks 3 and 4
- 2nd Shift (Sub-Schedule Number 02) during Weeks 5 and 6
- 3rd Shift (Sub-Schedule Number 03) during Weeks 1 and 2

Notice the days off for which Crew 3 is scheduled (Sub-Schedule Number 00).

'ZZ' has been entered for all subsequent days/weeks to indicate the pattern begins to repeat as of Week 7, Day 1.



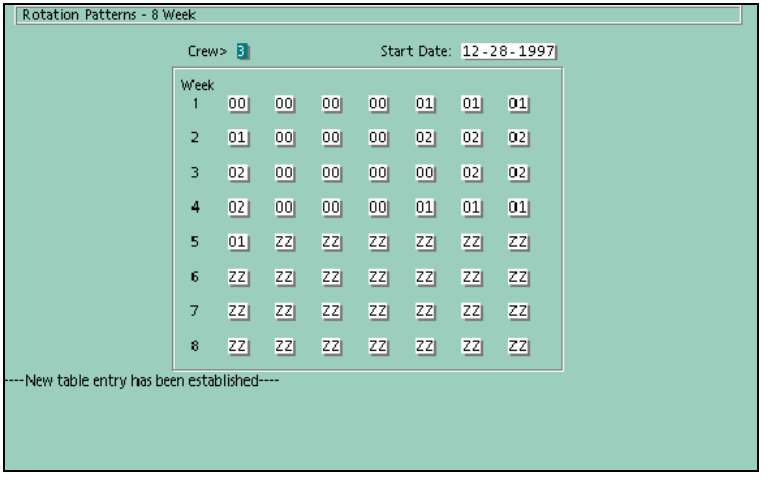
Crew 3

Based on the Sub-Schedule Numbers on this form, Crew 3 is assigned to work the:

- 1st Shift (Sub-Schedule Number 01) during Weeks 1, 2, 4 and 5
- 2nd Shift (Sub-Schedule Number 02) during Weeks 2, 3 and 4

Notice the days off for which Crew 3 is scheduled (Sub-Schedule Number 00).

'ZZ' has been entered for all subsequent days/weeks to indicate the pattern begins to repeat as of Week 5, Day 2.



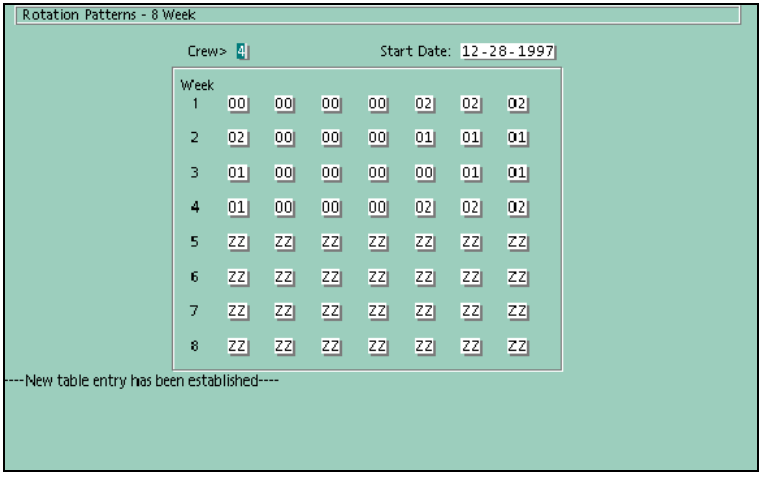
Crew 4

Based on the Sub-Schedule Numbers on this form, Crew 4 is assigned to work the:

- 1st Shift (Sub-Schedule Number 01) during Weeks 2, 3 and 4
- 2nd Shift (Sub-Schedule Number 02) during Weeks 1, 2, 4 and 5

Notice the days off for which Crew 4 is scheduled (Sub-Schedule Number 00).

'ZZ' has been entered for all subsequent days/weeks to indicate the pattern begins to repeat as of Week 5, Day 2.


Rotation Patterns - 8 Week
Crew> 4
Start Date: 12-28-1997
Week
1 00 00 00 00 02 02 02
2 02 00 00 00 01 01 01
3 01 00 00 00 00 01 01
4 01 00 00 00 02 02 02
5 ZZ ZZ ZZ ZZ ZZ ZZ ZZ
6 ZZ ZZ ZZ ZZ ZZ ZZ ZZ
7 ZZ ZZ ZZ ZZ ZZ ZZ ZZ
8 ZZ ZZ ZZ ZZ ZZ ZZ ZZ
----New table entry has been established----

Utilities to view and track crew rotations

Two online utilities are delivered to assist you in viewing and tracking your crew rotations.

Display Sub-Schedule Nbr for Crew 8-Wk form

This utility displays the schedule (or shift) assignments for a specified crew code and date for a crew that was entered on the Rotation Patterns - 8 Week form (CR2SCR). The next date a shift change will occur is also displayed.

Display Sub-Schedule Nbr For Crew 14-Wk form

This utility displays the schedule (or shift) assignments for a specified crew code and date for a crew that was entered on the Rotation Patterns - 14 Week form (CR3SCR). The next date a shift change will occur is also displayed.

Packaged reports for crew rotations

Two packaged reports are delivered to print your crew rotations:

Crew Rotation report, (CRTABL)

This report lists the crew codes and Sub-Schedule Numbers entered on the Rotation Patterns - 8 Week form (CR2SCR).

Crew Rotation report, (CR14TB)

This report lists the crew codes and Sub-Schedule Numbers entered on the Rotation Patterns - 14 Week form (CR3SCR).

☞ *See* **Report Quick Reference** *(see "Schedule vs. Actual Hours report (TN68PT)" on page 348) for more information about these packaged*

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

The Guided Practice for these tasks has been designed to rotate employees between two twelve-hour schedules (or shifts). For this type of rotation, three schedule tables were established containing identical Schedule Numbers for the schedules through which they will rotate, including an off-day.

Tasks

Defining Schedule Numbers

1. Access the Crew Schedule Selection form (CR1SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up Crew Rotations
Task: Crew Schedule Selection

For practice, access the Crew Schedule Selection form (CR1SCR).

2. Enter your Schedule Number(s)

Enter up to 30 Schedule Numbers for the schedules you want to specify for crew rotation. Check the Schedule Master form (ST1SCR) to see which schedules have been set up.

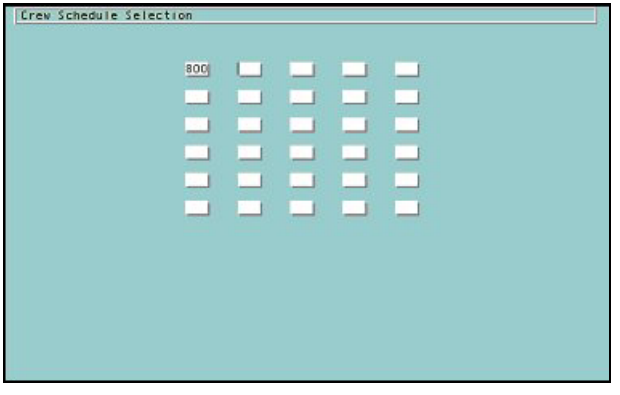
For practice, type Schedule Number '800'.

3. Click Save or press Enter

The Schedule Number is entered and a '---Complete---' message is displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Use of the Crew Schedule Selection form ***(on page 169)***

For a discussion about entering Schedule Numbers.

Defining rotation patterns of up to eight weeks

1. Access the Rotation Patterns - 8 Week form) Patterns - 8 Week form) (CR2SCR)

Access this form by making the following selection from the navigator:

Component:	Time and Attendance
Process:	Set up Crew Rotations
Task:	8 Wk Rotation Patterns

For practice, access the Rotation Patterns - 8 Week form (CR2SCR).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Enter a Crew

Enter a unique, alphanumeric Crew code (A through Z, 0 through 9).

For practice, type '2'.

4. Enter a Start Date

Enter a starting date for this rotation pattern. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-05-1998'.

5. Enter Sub-Schedule Numbers

Enter Sub-Schedule Numbers in the order they will rotate to establish the rotation pattern. Check the Schedule Master form (ST1SCR) to see which Sub-Schedule Numbers have been set up. Up to 56 Sub-Schedule Numbers can be set up on this form; one number for each day of the week for up to eight weeks. If the Sub-Schedule Numbers begin to repeat, enter 'ZZ' for that day and all Subsequent days on the form.

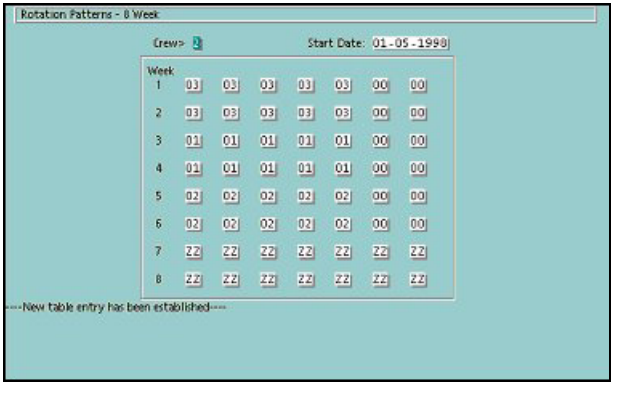
For practice, type in the Sub-Schedule Numbers as follows:
Week 1: 03, 03, 03, 03, 03, 00, 00
Week 2: 03, 03, 03, 03, 03, 00, 00
Week 3: 01, 01, 01, 01, 01, 00, 00
Week 4: 01, 01, 01, 01, 01, 00, 00
Week 5: 02, 02, 02, 02, 02, 00, 00
Week 6: 02, 02, 02, 02, 02, 00, 00
Week 7: ZZ

6. Click Save or press Enter

The rotation schedule is established.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Understanding rotation patterns ***(on page 171)***

For a discussion about using the rotation pattern forms.

Defining rotation patterns of up to 14 weeks

This task is used to set up rotation patterns of up to 14 weeks, including rotation patterns of less than eight weeks.

1. Access the Rotation Patterns - 14 Week form (CR3SCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up Crew Rotations
Task: 14 Wk Rotation Patterns

For practice, you have already set up rotation patterns on the Rotation Patterns - 8 Week form (CR2SCR) that are very similar to this form. No guided practice is provided for this form.

2. Enter a Crew

Enter a unique, alphanumeric Crew (A through Z, 0 through 9).

3. Enter a Start Date

Enter a starting date for this rotation pattern. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

4. Enter Sub-Schedule Numbers

Enter Sub-Schedule Numbers in the order they will rotate to establish the rotation pattern. Check the Schedule Master form to see which Sub-Schedule Numbers have been set up. Up to 98 Sub-Schedule Numbers can be setup on this form— one number for each day of the week for up to 14 weeks. If the Sub-Schedule Numbers begin to repeat, enter 'ZZ' for that day and all subsequent days on the form.

5. Click Save or press Enter

The rotation schedule is established.

See also:

- Understanding rotation patterns ***(on page 171)***

For a discussion about using the rotation pattern forms.

Review of Questions Answered

1. What are crew rotations and how do they work?

2. What are rotation patterns and how are they set up?

3. What online utilities and packaged reports are available for viewing and tracking your rotation patterns?

PART 3

Setting Up Employees for Time and Attendance

In This Section

CHAPTER 8

Setting Up and Maintaining Employee Badge Details

In This Chapter

Introduction

Employees are identified in Time and Attendance by employee numbers and badge numbers. This information is necessary for recording employee clock transactions (rings). In this section, you will learn how to create badge numbers and associate them with employees.

In addition to an employee's 10-character employee number, you must also assign them a 10-character badge number. The badge number is used by Time and Attendance Administration when recording employee clock transactions (rings).

Tasks

The following tasks are discussed in this section:

- Attaching an employee to a badge
- Deactivating a badge
- Reactivating a badge
- Viewing the history of an employee's badge
- Correcting badge information

Prerequisites

Before you can complete this section, you must ensure that the tasks in Section 3: 'Getting Started with Time and Attendance' have been completed.

☞ *Refer to* **Getting Started with Time and Attendance** *(on page 23) for more information.*

Questions answered

The following questions are answered in this section:

1. What is a badge number and how is it created?
2. How are badge numbers used?

Understanding clock transactions (rings)

Clock transactions (rings) are records containing the information needed to create time entries for payroll processing. When a badge is swiped through a clock, a clock transaction (ring) is created. Your third party badge reader program extracts the clock transaction (ring) from the clocks and builds ring files on the PC. The clock transaction (ring) records in these files are applied to the Employee Database, where the clock transactions (rings) are validated, errors can be corrected, and time entries can be created.

☞ *Refer to your third party badge reader documentation, for more information on how clock transaction (ring) records are extracted.*

A ring record is 64 characters in length. An example of the layout is shown below.

```
         1         2         3         4         5         6
1...5....0....5....0....5....0....5....0....5....0....5....0....
S00198010108000199999911111111113333444455556666FFFFFFFFF0011XX
```

Ring Record Layout

In these positions	Enter	Description
1	Supervisor Flag	'S' if the badge has been encoded as a supervisor badge; otherwise leave blank.
2-4	Clock ID	Station ID for the clock
5-10	Ring Date	Date of the ring in YYMMDD format
11-14	Ring Time	Time of the ring in HHMM format. Military time (24 hour clock) is used.
15-16	Ring Code	Activity code, if entered at the clock
17-22	Organization	Employee's Organization
23-32	Badge number	Employee's organization badge number
33-36	Ring Organization 3	Organization 3, if entered at the clock
37-40	Ring Organization 4	Organization 4, if entered at the clock
41-44	Ring Organization 5	Organization 5, if entered at the clock
45-48	Ring Organization 6	Organization 6, if entered at the clock
49-58	Ring function	Function value, if entered at the clock
59-61	HED number	Earnings code, if entered at the clock
62	Shift code	Shift code, if entered at the clock
63-64	Check digit and carriage return	Internal items that are not part of the clock transaction (ring) record

☞ *Refer to* **Capturing Employee Work Time** *(on page 253) for more information on the clock transaction (ring) format.*

Badges

To create badges, you will need to use your third party badge reader software. Time and Attendance Administration can accept data from either magnetically encoded or bar coded badges. Data must be in the clock transaction (rings) format.

Some restrictions may apply to the badge number length that you assign, based on whether you are using bar code or magnetic stripe badges.

☞ *Refer to your third party badge reader documentation for more information on the badge number length you can use.*

Note: Cyborg advises careful consideration when implementing badge number schemes. Badges may be lost or stolen, and employees resign.

If you encode your badges with the employee's Organization, you can indicate this to the system. On each Organizations Company Options form (AF-SCR), leave the Mag Stripe/Bar Cde text box blank or select the Magnetic Stripe (M) option.

If your third party software cannot create clock transactions (rings) with the various Organization values you must ensure the following conditions are true:

- All clock transactions (rings) contain the Organization in positions 17-22.
- In the Mag Stripe/Bar Cde list box, on each Organization Company Options form (AF-SCR), you select 'Bar Code' (B).
- No badge numbers are duplicated for any employees on the Employee Database. The Upload Rings program will read the default Organization (CYBORG) on each clock transaction, and then determine the organization and employee to which the clock transaction belongs.

☞ *Refer to* **Getting Started with Time and Attendance** *(on page 23) for more information on the Company Options form.*

Apply the Concept
If your third party software cannot create badges with the Organization value what conditions must you be aware of?

Deactivating and reactivating badges

Badges numbers can be deactivated on a temporary or permanent basis.

For example, if a badge has been lost, stolen, or destroyed, you may issue the employee a new permanent badge. You may deactivate the badge number if the new badge is encoded with a different badge number.

If an employee forgets to bring a badge, you may wish to deactivate the misplaced badge on a temporary basis and issue them a new temporary badge. When the employee returns with the permanent badge, you would then deactivate the temporary badge and reactivate the permanent badge.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

You must have completed the Guided Practices in the prior sections to guarantee the successful completion of the Guided Practice that follows.

Tasks

Attaching an employee to a badge

The Badge Number Assignments form (TABSCR) is used to activate and deactivate employee badge numbers.

Note: Before you can attach an employee to a badge, the badge must have been encoded with a badge number.

In this task, you are going to assign a badge number to a new employee.

1. Access the Badge Number Assignments form (TABSCR)

Access this form by making the following selection from the navigator:

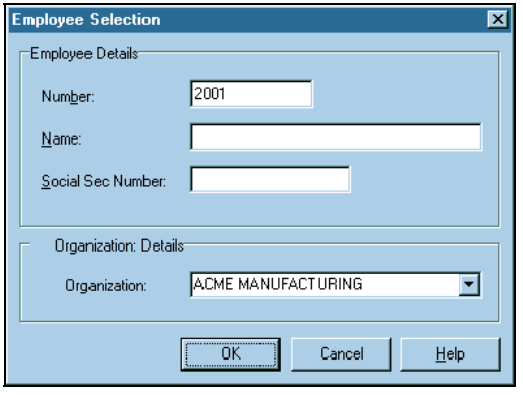
Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Badge

For practice, access the Badge Number Assignments form (TABSCR).

2. Enter an employee number

On the Enter a Valid Organization/Employee dialog box, enter the number of the employee you want to assign to a badge.

For practice, type '2001' in the Number text box.



3. Click OK or press Enter

The Badge Number Assignments form (TABSCR) is displayed for the employee selected.

For practice, click OK.

4. Enter a Badge Number

Enter a badge number for the employee. A badge can be up to 10 numerical characters in length.

For practice, type '002001'.

5. Enter an Issue Date

Enter the date the badge is issued on. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '12-31-1997'.

6. Enter a Deactivate Date

If you need to deactivate a badge number, enter the date on which the badge is deactivated. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

Refer to **Deactivating a badge** *(on page 193), for more information on how to use this text box.*

For practice, leave this text box blank.

7. Enter a Comment

Enter a reason why the badge has been deactivated. For example, a badge may have been lost or destroyed.

Refer to **Deactivating a badge** *(on page 193), for more information on how to use this text box.*

For practice, leave this text box blank.

8. Enter a New Date

This text box is used to change the date the badge was issued on. For example, after having assigned a badge to an employee you realize that you have used the wrong issue date. You can change the issue date by entering the correct date in this text box. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

Refer to **Correcting badge information** *(see "Deleting Schedule tables" on page 161), for more information on how to use this text box.*

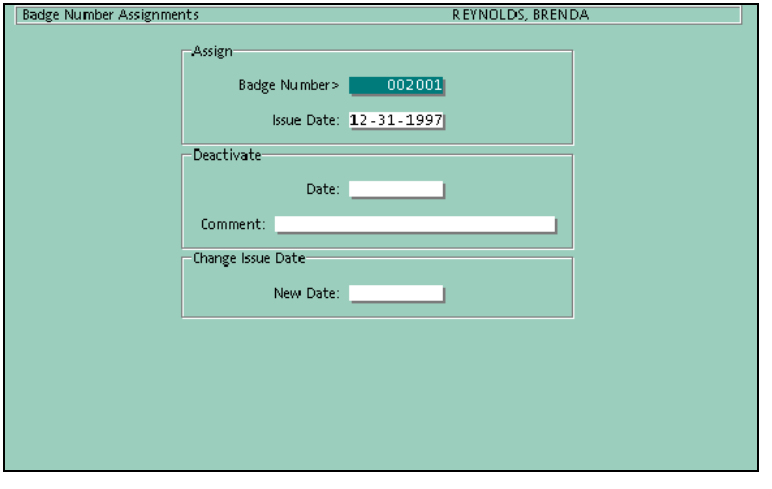
For practice, leave this text box blank.

9. Click Save or press Enter

The badge is assigned to the employee.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Badges ***(on page 189)***

For an explanation of the different badge types.

Deactivating a badge

If you need to deactivate a badge, complete the steps described in this task.

In this task you are going to deactivate the badge because an employee forgot to bring it to work.

1. Access the Badge Number Assignments form (TABSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Badge

For practice, access the Badge Number Assignments form (TABSCR).

2. Enter a Deactivation Date

Enter a deactivation date for the badge. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-01-1998'.

3. Enter a Comment

Enter a reason why the badge is being deactivated.

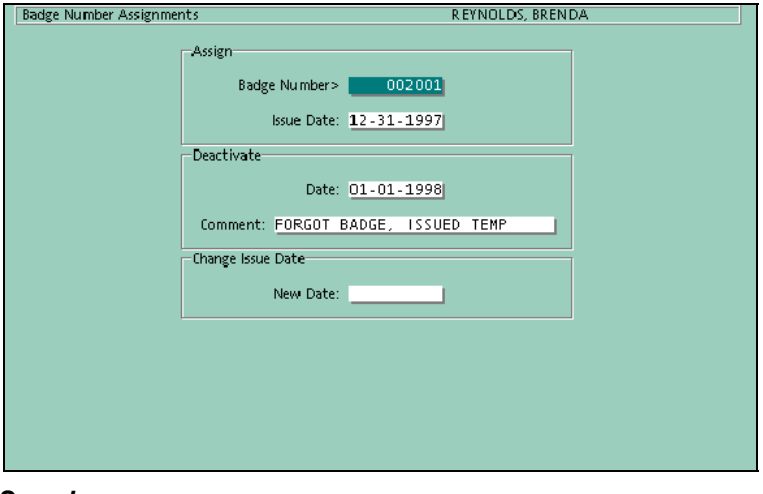
For practice, type 'FORGOT BADGE, ISSUED TEMP'.

4. Click Save or press Enter

The badge is deactivated.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Deactivating and reactivating badges ***(on page 190)***

For an explanation of deactivating and reactivating badges.

Reactivating a badge

Badges can be reactivated for a number of different reasons. For example, an employee's badge was deactivated because they forgot to bring it to work. On the following day, the employee returns to work with the permanent badge. Because a temporary badge was issued to the employee, you would deactivate the temporary badge first, and then reactivate their permanent badge.

In this task, you are going to select a different employee. This employee has returned to work with the permanent badge. Before this badge can be reactivated, you need to deactivate the temporary badge.

1. Access the Badge Number Assignments form (TABSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Badge

For practice, access the Badge Number Assignments form (TABSCR).

2. Access the Employee Selection dialog box

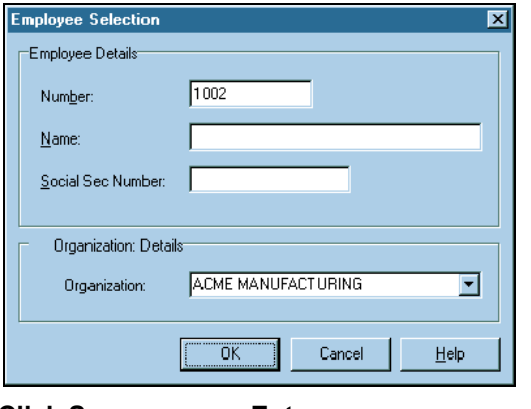
Access the Employee Selection dialog box using the Employee button on the toolbar.

For practice, click on the Employee button on the toolbar.

3. Enter an employee number

Enter an employee number in the Key text box.

For practice, enter '1002'.



4. Click Save or press Enter

To select this employee, click Save or press Enter.

For practice, click Save or press Enter.

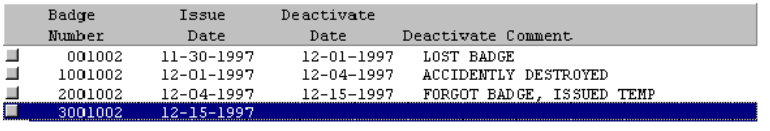
5. Select a badge

Access the message area using the Selections button on the toolbar.

Select a badge by double-clicking on an entry.

For practice, double-click on the Badge Number '3001002'.

In this example you can see from the Deactivate Comment text box, that the employee's previous badge was issued as a temporary badge. You can determine from this that the employee's current badge is the temporary badge. This badge is numbered 3001002.



Badge Number	Issue Date	Deactivate Date	Deactivate Comment
0001002	11-30-1997	12-01-1997	LOST BADGE
1001002	12-01-1997	12-04-1997	ACCIDENTLY DESTROYED
2001002	12-04-1997	12-15-1997	FORGOT BADGE, ISSUED TEMP
3001002	12-15-1997		

6. Deactivate the temporary badge

To deactivate the temporary badge, you need to enter a deactivate date and reason. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

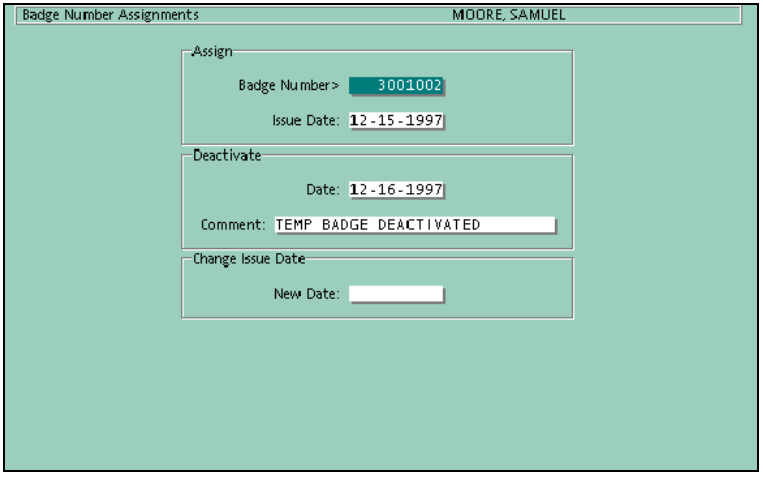
For practice, type '12-16-1997' in the date text box, and type ' TEMP BADGE DEACTIVATED' in the Comment text box.

7. Click Save or press Enter

The badge is deactivated.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



8. Reactivate the permanent badge

Access the message area using the Selections button on the toolbar.

Select the permanent badge by double-clicking on an entry.

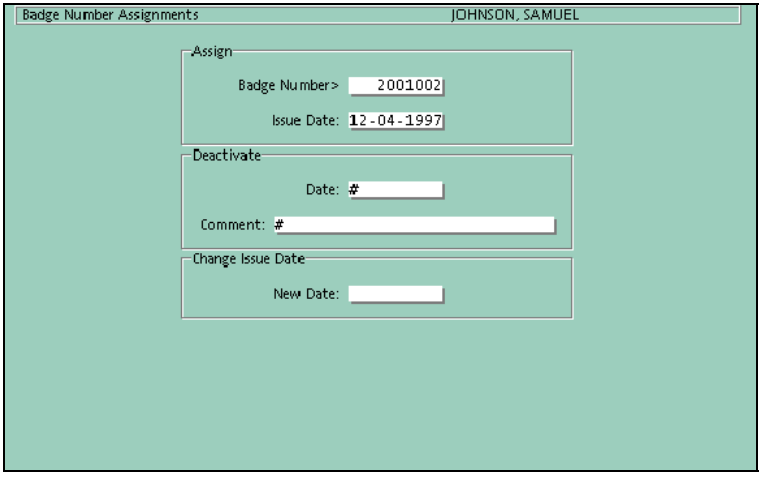
For practice, double-click on the deactivated Badge Number '2001002'.

Badge Number	Issue Date	Deactivate Date	Deactivate Comment
001002	11-30-1997	12-01-1997	LOST BADGE
1001002	12-01-1997	12-04-1997	ACCIDENTLY DESTROYED
2001002	12-04-1997	12-15-1997	FORGOT BADGE, ISSUED TEMP
3001002	12-15-1997	12-16-1997	TEMP BADGE DEACTIVATED

9. Reactivate the badge

To reactivate the badge delete the entries in the Date and Comment text box, and replace with the number sign (#).

For practice, delete the entries in the Date and Comment text boxes, and enter the number sign.



10. Click Save or press Enter

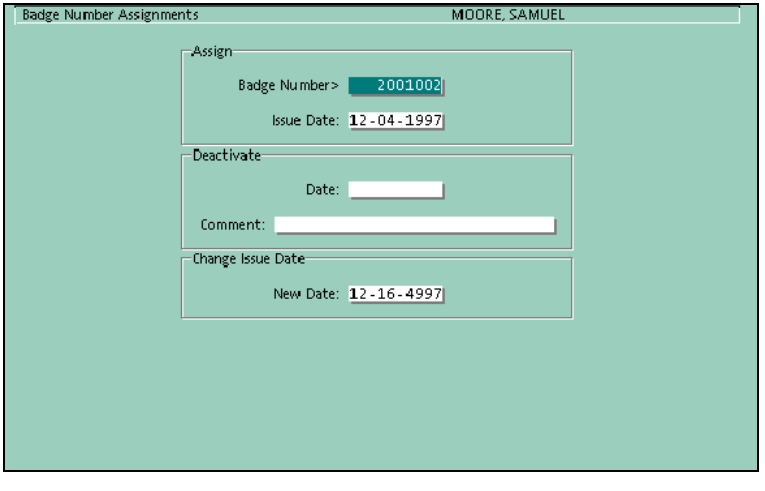
The badge is reactivated.

For practice, click Save or press Enter.

11. Enter A New Date

Enter the date the badge is reissued, in the New Date text box. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '12-16-1997'.

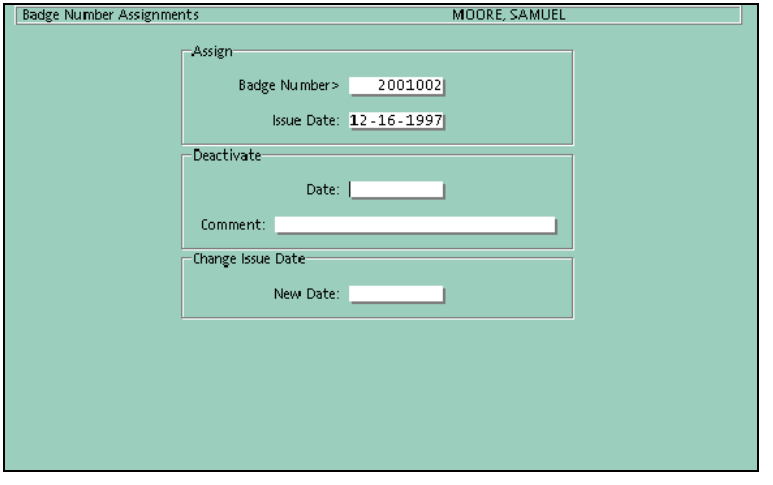


12. Click Save or press Enter

The badge is reactivated, and the issue date is updated.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Deactivating and reactivating badges ***(on page 190)***

For an explanation of deactivating and reactivating badges.

Viewing the history of an employee's badge

You should view the history of an employee's badge assignments before you issue a new or temporary badge. Viewing an employee's badge assignments allows you to see if they are consistently forgetting or losing the badge.

In this task, you are going to view the badge assignment history for the employee whose badge you reactivated in **Reactivating a badge** *(see "Entering override values on a Schedule Activities table (optional)" on page 153).*

1. Access the Badge Number Assignments form (TABSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Badge

For practice, access the Badge Number Assignments form (TABSCR).

2. View the employee's badge assignment history

Access the message area using the Selections button on the toolbar.

The history of the employee's badge assignment is shown.

If you completed the Guided Practice, the results should look similar to the example that follows:

Badge Number	Issue Date	Deactivate Date	Deactivate Comment
0001002	11-30-1997	12-01-1997	LOST BADGE
1001002	12-01-1997	12-04-1997	ACCIDENTLY DESTROYED
2001002	12-16-1997		
3001002	12-15-1997	12-16-1997	TEMP BADGE DEACTIVATED

Correcting Badge Information - Option 1: Correcting the issue date of a badge assignment

If you assign a badge to an employee, and then realize that you used the wrong issue date, you can change the issue date by completing the steps described in this task.

In this task you are going to change the issue date for the badge assignment you made in Attaching an employee to a badge.

1. Access the Badge Number Assignments form (TABSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Badge

For practice, access the Badge Number Assignments form (TABSCR).

2. Access the Employee Selection dialog box

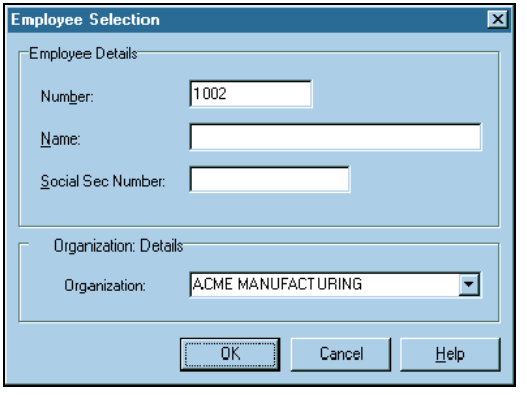
Access the Employee Selection dialog box using the Employee button on the toolbar.

For practice, click on the Employee button on the toolbar.

3. Enter an employee number

Enter an employee number in the Key text box.

For practice, enter '1002'.



4. Click OK or press Enter

To select this employee, click OK.

For practice, click OK or press Enter.

5. Select a badge

Access the message area using the Selections button on the toolbar.

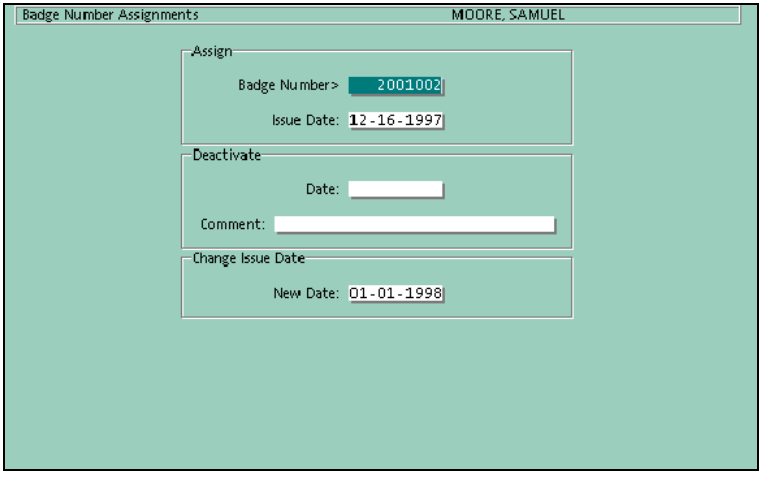
Select the permanent badge by double-clicking on an entry.

For practice, double-click on the deactivated Badge Number '2001002'.

6. Enter the New Date

In the New Date text box, enter the correct date that the badge was issued on. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-01-1998'.

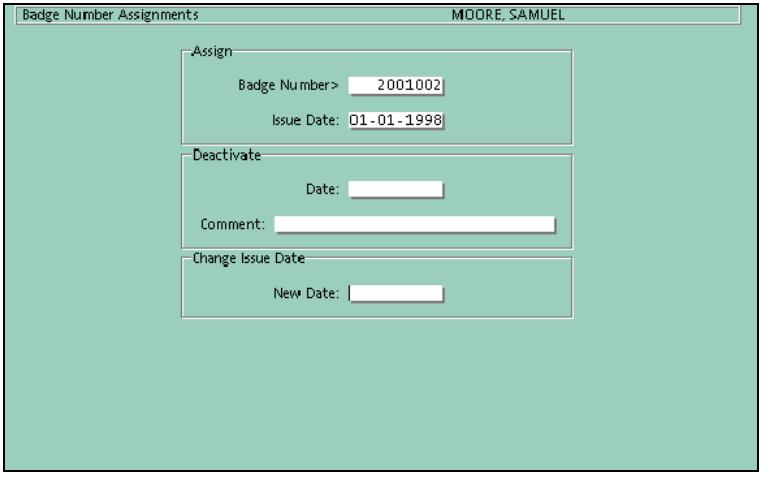


7. Click Save or press Enter

The issue date for the badge is changed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Correcting Badge Information - Option 2: Deleting employee badge assignment history

If you assign an employee to the wrong badge number, you would need to delete the badge assignment. You can then attach the employee to the correct badge.

1. Access the Badge Number Assignments form (TABSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Badge

For practice, access the Badge Number Assignments form (TABSCR).

2. Access the Employee Selection dialog box

Access the Employee Selection dialog box using the Employee button on the toolbar.

For practice, click on the Employee button on the toolbar.

3. Select a badge

Select a badge by double-clicking on an entry.

For practice, double-click on a Badge Number.

4. Delete a badge

Delete this badge using the Del Entry button on the toolbar.

For practice click on the Del Entry button on the toolbar.

5. Click on the Yes button

The badge assignment record is deleted.

For practice, click on Yes.

See also:

- Synchronizing Employee Badge Assignment Alternate Key Records ***(on page 448)***

For information on maintaining badge assignment alternate key records.

Review of Questions Answered

1. What is a badge number and how is it created?

2. How are badge numbers used?

CHAPTER 9

Assigning Employees to Time and Attendance

In This Chapter

Introduction

When you have established your organization's Time and Attendance rules, you are then ready to assign employees to the Time and Attendance system. Do this by selecting a particular set of rules you want an individual employee to follow.

You determine which Time and Attendance rules an employee will follow by assigning them to a particular Schedule Master table (ST1SCR). The tasks and concepts you need to complete, in order to do this are discussed in this section.

Tasks

The following tasks are discussed in this section:

- Assigning an employee to a schedule and crew
- Attaching a group of employees to a schedule
- Checking an employee's schedule assignments
- Deleting employee schedule assignments
- Checking the shift assignments for a 8 and 14 week rotation patterns

Prerequisites

Before you can begin to assign employees to Schedule Master tables, the following tasks must be completed.

- Set up Schedule Master tables

Before you can assign employees to Time and Attendance Administration you must have established Schedule Master tables.

☞ *Refer to* **Setting Up Schedules** *(on page 141) for detailed information.*

- Define 8 and 14-week Rotation Patterns

Before you can assign an employee to a crew, you must have established a crew rotation pattern.

☞ *Refer to* **Setting Up Rotation Patterns** *(on page 165) for detailed information.*

Questions answered

The following questions are answered in this section:

1. How are individual employees assigned to a Schedule Master table (ST1SCR)?
2. How are groups of employees assigned to a Schedule Master table (ST1SCR)?
3. How are employees schedule assignments checked?
4. How is the rotation pattern for a particular crew checked?

Options for assigning employees to Time and Attendance schedules

When you have established your organization's Time and Attendance rules, you can then assign employees to Time and Attendance schedules. When you do this, you select a particular set of rules you want an individual employee to follow. These rules are established on the Schedule table forms. Employees are assigned to Time and Attendance Administration using either of the:

- Schedule Assignments form (TASSCR)
- Global Schedule Assignments form (GSASCR)

In either of these forms, you determine which Time and Attendance rules an employee will follow by assigning a particular Schedule Master table (ST1SCR). The Global Schedule Assignment form (GSASCR) establishes the Schedule Assignment form (TASSCR) for you.

The Schedule Assignment form (TASSCR) includes a date and a schedule assignment. Any clock transactions (rings) for the employee containing the same date or a later date will use the schedule specified on that form for validation and time entry creation.

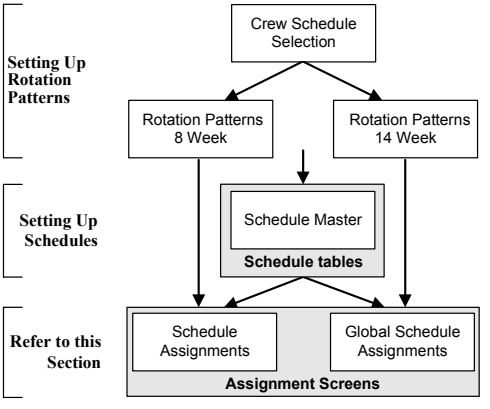
You may set up multiple schedule assignments on the form, including future schedule assignments, on the form. For example, if you enter an:

- Assignment date of 01-01-2001
- Schedule Number 800
- Sub-Schedule Number 01

Schedule 800-01 will be invoked when it encounters clock transactions with a date of 01-01-2001 or later.

The following diagram gives an overview of the process of assigning an employee to a Schedule table. If you are using crews and rotation patterns, these must be completed before you assign employees to a Schedule table.

The diagram indicates the order in which the different tables should be completed, working from top to bottom. For a more detailed explanation of each table, refer to the section as indicated in the diagram.

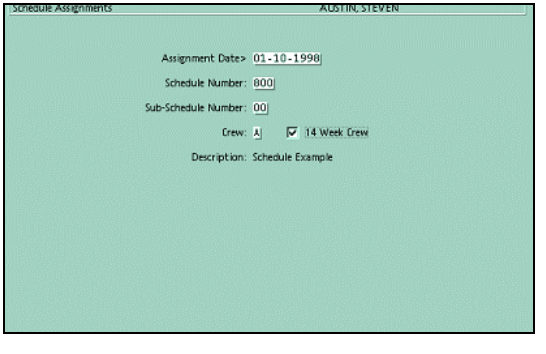


Individual employee schedule assignments

The Schedule Assignments form (TASSCR) is used to assign individual employees to a Schedule table. This form is also used to assign an employee to a crew and its associated rotation pattern. Before you can complete this form, you must know to which Schedule table you want to assign an employee. If applicable, you must also know the crew code and its associated rotation pattern.

Note: *Unless you select the 14-Week Crew check box, Time and Attendance Administration assumes that a crew's rotation pattern is up to 8-weeks.*

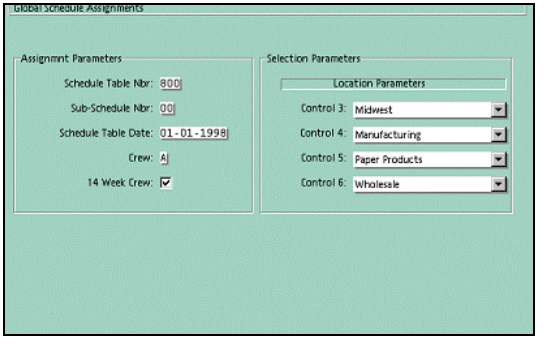
The following example shows an employee who is assigned to crew 'A' and an 8-week rotation pattern.



Employee group schedule assignments

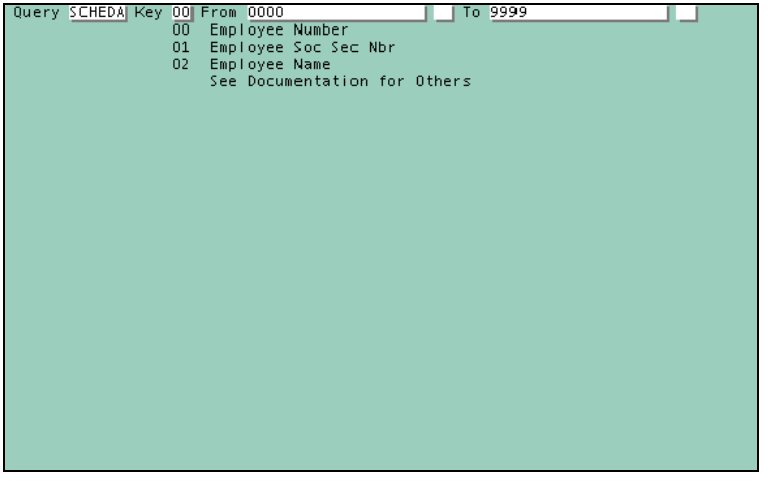
You can assign both individual employees and groups of employees to Time and Attendance schedules. If you want to assign a group of employees, all of the employees that you want to assign to a particular Schedule table must have Control Level codes you specify.

When you assign a group of employees to Time and Attendance schedules, you must complete a two-part process. You must first complete the Global Schedule Assignments form (GSASCR). This form allows you to assign a Schedule Master table (ST1SCR) to employees with common Organization Level codes. This form is also used to assign employees to a crew and its associated rotation pattern.



When you have completed this form, the second process is to complete the SCHEDA Query program. The SCHEDA Query program must be run to assign the Schedule table to the employees.

This is a Query program that assigns Schedule tables to groups of employees, based on specific Organization Levels you selected on the Global Schedule Assignments form (GSASCR).



Apply the Concept
Under what circumstances would your organization be able to use the Global Schedule Assignments form (GSASCR)?

Assigning employees to crews and rotation patterns

When you assign either an individual employee or groups of employees to a Schedule Master table (ST1SCR), you can also assign them to a crew, and the rotation pattern you entered for that crew.

A one-character crew identifier is entered to assign the employee(s) to a rotation pattern that was defined on the rotation pattern forms. These forms are:

- Rotation Patterns - 8 Week form (CR2SCR)
- Rotation Patterns - 14 Week form (CR3SCR)

When you assign an employee(s), the Sub-Schedule Number is not used. When processing employees, the Time Entry Validation/Creation form (TMCARD) determines the employee schedule assignment by locating and using the appropriate Sub-Schedule Number, based on the rotation pattern defined by the crew.

Note: *If a crew identifier is not entered, the employee is not assigned to a rotation pattern and is assigned to the Schedule and Sub-Schedule you entered.*

The 14 Week Crew checkbox should be selected if the crew rotation pattern you are assigning was entered on the Rotation Patterns - 14 Week form (CR3SCR). Do not select this check box if the crew rotation pattern was entered on the Rotation Patterns - 8 Week form (CR2SCR).

☞ *Refer to* **Setting Up Rotation Patterns** *(on page 165) for more information on creating rotation patterns.*

Checking an employee's schedule assignments

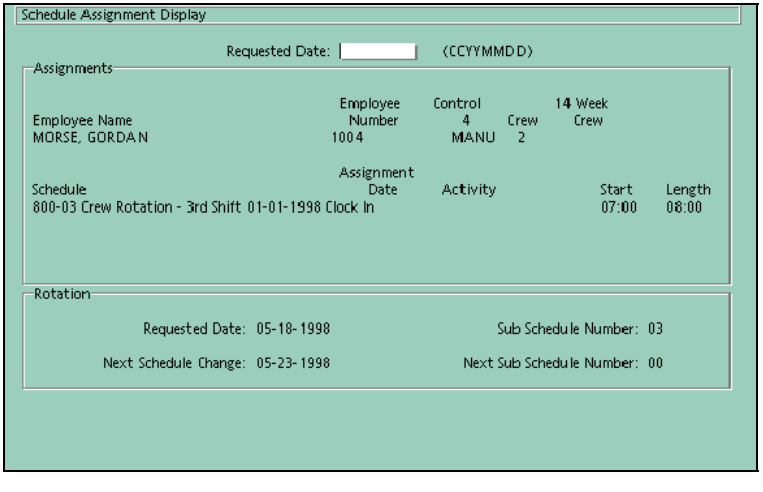
The Schedule Assignment Display form (SCHEDS) displays schedule information for employees in a particular organization. This form can be used online to verify that employees have been assigned to the correct schedule or to check schedule activity information. You can view schedule information based on a requested date.

This form displays the following information for the employee you select:

- Requested date
- Employee name
- Employee number
- Name of the Organization Level 4 the employee is assigned to
- The crew identifier, if applicable
- Indicates if the crew is a 14-week rotation (Y/N)
- Employee's badge number
- Description of the Schedule table the employee is assigned to
- Schedule assignment date
- Type of activity for Schedule assignment
- Activity start time
- Length of activity

If the employee is assigned to a crew rotation for the requested date, the form also displays:

- The Schedule the employee is assigned to, based on the date of the online inquiry
- The date the Schedule will change, based on the date of the online inquiry
- The name of the next Schedule, based on the date of the online inquiry



Checking crew rotation patterns

If an employee is assigned to a crew there will be occasions when you will need to find out what shift a crew is using on a particular date and what shift they will use next. You can use the following two forms to display this information:

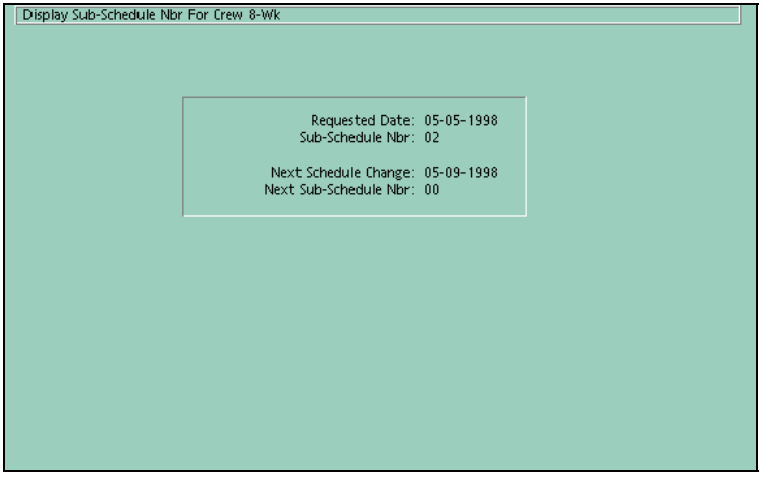
- Display Sub-Schedule Nbr For Crew 8-Wk form
- Display Sub-Schedule Nbr For Crew 14-Wk form

A Sub-Schedule number is used to represent the schedule tables through which a group of employees or crew will rotate. The Sub-Schedule numbers comprising the crew are associated with a Schedule Master table (ST1SCR). The Sub-Schedule Numbers represent the different shifts within the same Schedule Master table (ST1SCR). The following table contains a simple example of this concept:

Schedule Number	Sub-Schedule Number	Description
800	00	Day-off
800	01	1st Shift
800	02	2nd Shift
800	03	3rd Shift

The following information is displayed based on either of the two forms:

- The date for which the inquiry is being made.
- The Sub-Schedule Number that will be used at that date.
- The date that the Sub- Schedule will change, in relation to the inquiry date.
- The next Sub-Schedule Number that will be used by the crew when the shift rotates, in relation to the inquiry date.


Display Sub-Schedule Nbr For Crew 8-Wk
Requested Date: 05-05-1998
Sub-Schedule Nbr: 02
Next Schedule Change: 05-09-1998
Next Sub-Schedule Nbr: 00

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Assigning an employee to a schedule and crew

The Schedule Assignments form (TASSCR) is used to attach a Schedule Master table (ST1SCR) to an employee. If applicable, this form is also used to:

- Select a crew rotation to an employee
- Indicate the rotation pattern to be used (8 or 14-weeks)

In this task you are going to assign the following two employees to Time and Attendance Administration:

- Moore, Samuel, employee number 1002
- Morse, Gordan, employee number 1004

1. Access the Schedule Assignments form (TASSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Schedule

For Practice, access the Schedule Assignments form (TASSCR).

2. Access the Employee Selection dialog box

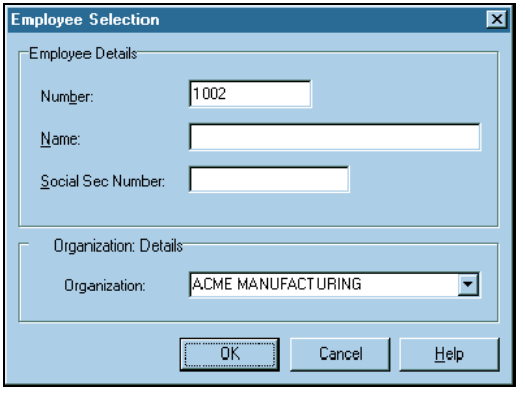
Access the Employee Selection dialog box using the Employee button on the toolbar.

For practice, click on the Employee button on the toolbar.

3. Enter a Number

Enter the employee number you want to assign to a Schedule Master table (ST1SCR).

For Practice, type '1002' in the Number text box.



4. Click OK or press Enter

The Schedule Assignments form (TASSCR) is displayed for the employee you selected.

For practice, click OK or press Enter.

5. Enter an Assignment Date

Enter a date on which the employee will be assigned to the Schedule Master table (ST1SCR). The employee will begin working to the rules of this table on that date.

Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For Practice, type '01-01-1998' in the Number text box.

6. Enter a Schedule Number

Enter the number of the schedule to which the employee is to be assigned.

For Practice, type the Schedule Number '800'.

7. Enter a Sub-Schedule Number

Enter the Sub-Schedule Number of the schedule to which the employee is to be assigned.

For Practice, type the Sub-Schedule Number '00'.

8. Enter a Crew (optional)

If the employee is a member of a crew, enter the alphanumeric crew ID.

For Practice, leave this text box blank.

9. Select the 14 Week Crew check box (optional)

Select this check box if the crew's assigned Rotation Pattern is between 8 and 14 weeks. If you do not select this check box, the system assumes the employee is assigned to a rotation pattern between 1 and 8 weeks.

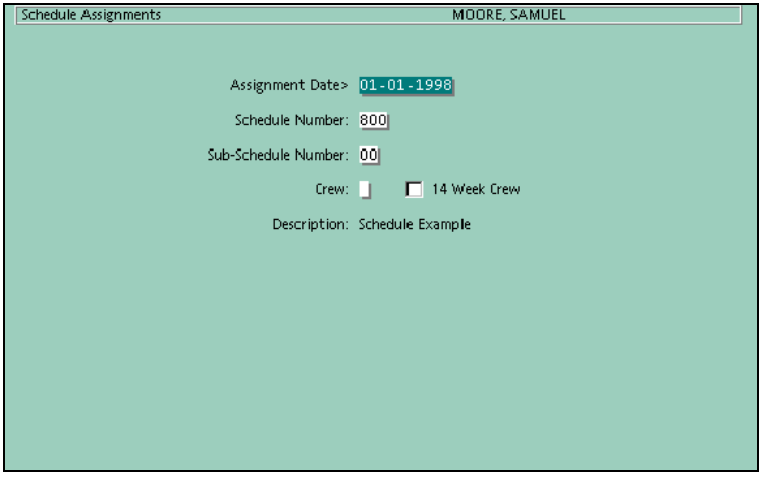
For Practice, leave this check box blank.

10. Click Save or press Enter

Your Schedule Assignments form is saved.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Repeat steps 1-9 and assign employee 1004, using the following parameters:
Assignment date '01-05-1998'
Schedule Number '800'
Sub-Schedule Number '00'
Crew Code '2'

Note: You must complete the Guided Practice in this task for both employees in order to use the Guided Practice in sections Capturing Employee Work Time and Working with Time Entries.

See also:

- Options for assigning employees to Time and Attendance schedules ***(on page 207)***

For an explanation on assigning employees to a Schedule Master table.

- Employee group schedule assignments ***(on page 209)***

For an explanation of the Global Schedule Assignments form.

- Assigning employees to crews and rotation patterns ***(see "Options for assigning employees to Time and Attendance schedules" on page 207)***

For an explanation on assigning employees to a crew.

- Checking crew rotation patterns ***(on page 213)***

For an explanation on to check crew rotation patterns.

Attaching a group of employees to a schedule

Use the Global Schedule Assignments form (SCHEDS) to assign a Schedule Master table to employees with common Organization Level codes.

1. Access the Global Schedule Assignments form (SCHEDS)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Global Schedule Assignment

2. Enter a Schedule Master table number

Enter the number of the Schedule Master table to which the employees will be assigned.

For Practice, type the Schedule Number '800'.

Note: If you cannot remember which Schedule Master number to use, access the Schedule Master table (ST1SCR).

3. Enter a Sub-Schedule Number

Enter the Sub-Schedule Number of the Schedule Master table (ST1SCR) to which the employees will be assigned.

For Practice, type the Sub-Schedule Number '00'.

4. Enter a Schedule Table Date

Enter the effective date of the Schedule assignment. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For Practice, type '01-01-1998'.

5. Enter a crew number (optional)

If the employees are members of a crew, enter the alphanumeric crew ID.

For Practice, leave this text box blank.

6. Select the 14 Week Crew check box (optional)

Select this check box if the employees' assigned crew uses the 14-week rotation pattern. If you do not select this check box, the system assumes the employees are assigned to an 8-week rotation pattern.

For Practice, leave this check box blank.

7. Select an Organization Level 3

This list box allows you to select which employees will be included in the Global Schedule Assignment process.

Note: The entry you make in these Organization Level code text boxes 3- 6 are checked against the employee location information. This information is recorded in either the Location/Pay Allocations form, or the Employee Information form (EF-SCR) for each employee. If a match is found on these forms, the employee is processed.

Note: At least one of the Organization Level text boxes must contain an entry.

For Practice, select 'Midwest'.

8. Select an Organization Level 4

For Practice, select 'Manufacturing'.

9. Select an Organization Level 5

For Practice, select 'Paper Products'.

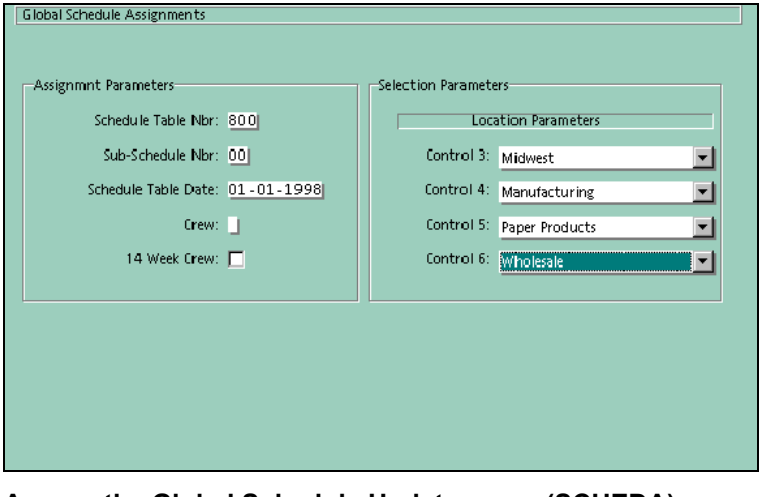
10. Select an Organization Level 6

For Practice, select 'Wholesale'.

11. Click Save or press Enter

Your Global Schedule Assignment table is saved

For practice, click Save or press Enter.



12. Access the Global Schedule Update query (SCHEDA)

This is a Query program that assigns the Schedule Master table number to groups of employees, based on specific Organization Levels you have selected.

Access this form by making the following selection from the navigator:

Component: User Tools
Process: User Tools
Task: Run a Query

For Practice, access the Query form.

13. Enter the name of the Query

On the Enter Query Parameters dialog box, enter SCHEDA in the Query text box.

For Practice, type 'SCHEDA'.

14. Enter a Key value

The Alternate Key text box determines by what method employee schedule assignments are generated, (for example, by employee number [00]). The Key options are:

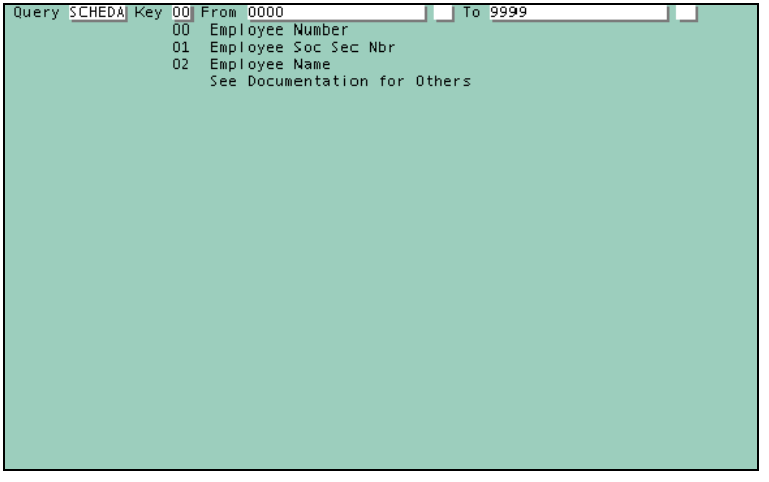
- Employee Number (00)
- Social Security Number (01)
- Employee Name (02)
- Program Name (P)
- Audit Record (ZZ)
- Documentation (MN) (batch only)
- Phonetic entry (PE)
- Tax records (TX)

For Practice, type '00' in the alternate key text box.

15. Enter the range of employees you want to assign to the Schedule Master table

The 'To' and 'From' text boxes allow you to enter a range of Employee Numbers. Any employees within the range you enter will have the Schedule Master table assigned.

For Practice, type '0000' in the 'From' text box, and '9999' in the 'To' text box.



16. Click Save or press Enter

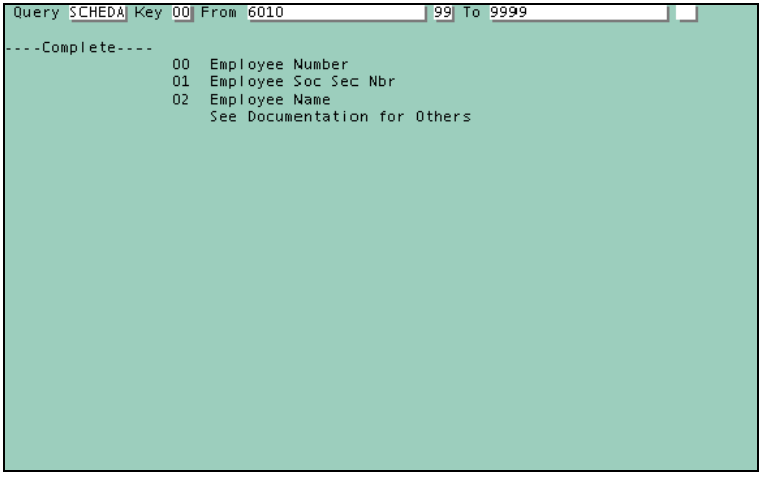
Your SCHEDA Query program is processed, and the following message is displayed:

'Complete'.

The Schedule Number is assigned to all the employees who matched all of the Organization Level you selected.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Options for assigning employees to Time and Attendance schedules ***(on page 207)***

For an explanation on assigning employees to a Schedule Master table.

Checking an employee's schedule assignments

Use the Schedule Assignment Display form (SCHEDS) to determine an employee's assigned Schedule Master table.

1. Access the Schedule Assignment Display form (SCHEDS)

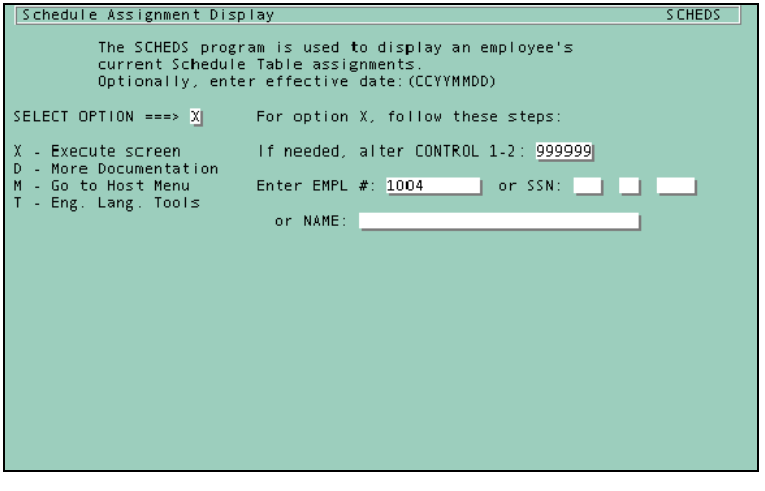
Access this form by making the following selection from the navigator:

Component:	Time and Attendance
Process:	Setup/Maintain Employee
Task:	View Schedule Assignment

2. Enter an employee number

In the Enter EMPL # text box, enter the number of the employee whose schedule assignments you want to view.

For Practice, type '1004'.

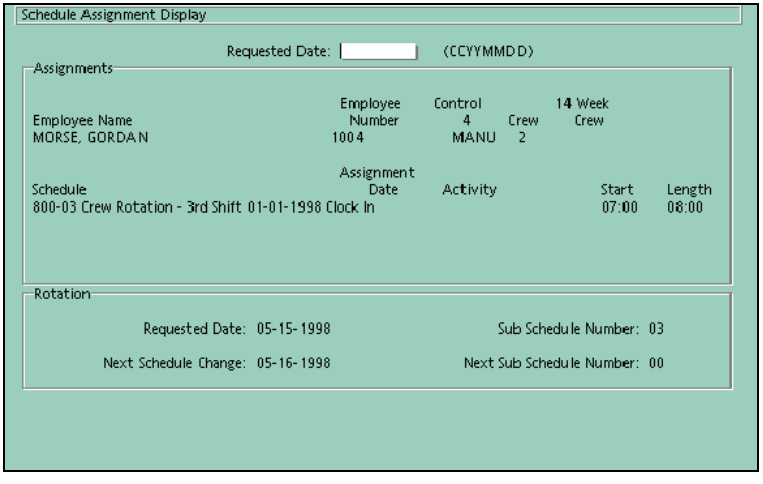


3. Click Save or press Enter

The Schedule Assignment Display form (SCHEDS) is displayed for today's date (system date).

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



4. Enter a request date

To check the Schedule assignments for a particular date, enter a date in the Requested Date text box. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

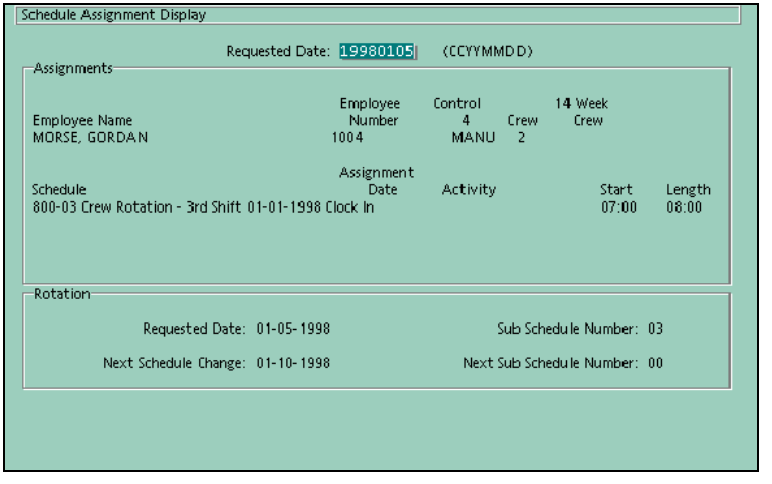
For Practice, type '19980105'.

5. Click Save or press Enter

The Schedule Assignment Display form is displayed for the requested date.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Checking an employee's schedule assignments *(on page 212)*

For an explanation of Schedule Assignment Display.

- **Badge Assignment Deletion query (DELTAB) (test data only** ***(see "Badge Assignment Deletion query (DELTAB) (test data only)" on page 503)*****)**

For an explanation of this query.

- **Time and Attendance Examples** ***(on page 415)***

For other examples of how the Schedule Assignment is used.

Deleting employee schedule assignments

To delete an employee's Schedule Assignment, follow the steps in this task.

1. Access the Schedule Assignments form (TASSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Schedule

For Practice, access the Earnings Code table.

2. Access the Employee Selection dialog box

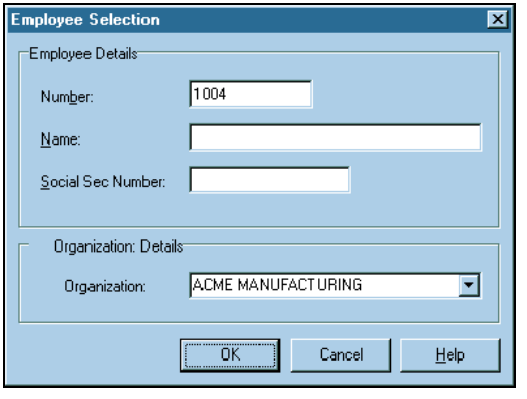
Access the Employee Selection dialog box using the Employee button on the toolbar.

For practice, click on the Employee button on the toolbar.

3. Enter an employee number

In the Employee Selection box, enter the employee number of the employee whose schedule assignment you want to delete.

For Practice, type '1004' in the Number text box.



4. Click OK or press Enter

To select this employee, click OK.

For practice, click OK or press Enter.

5. Access the message area

Access the message area using the Selections button on the toolbar.

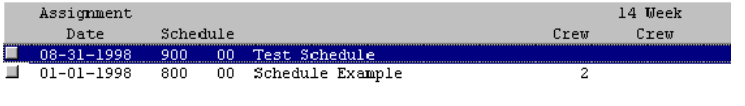
For practice, click on the Selections button.

6. Select a Schedule Assignment

Select a Schedule Assignment by double-clicking on an entry.

For practice, double-click on the schedule assignment with the following parameters:

- Dated '08-31-1998'
- Schedule numbers '900 00'



Assignment Date	Schedule			Crew	14 Week Crew
08-31-1998	900	00	Test Schedule		
01-01-1998	800	00	Schedule Example	2	

7. Delete a Schedule Assignment

Delete this badge using the Del Entry button on the toolbar.

For practice click on the Del Entry button on the toolbar.

8. Click on Yes

To delete the Schedule Assignment you selected, click on Yes. The Schedule Assignment is deleted, and the Schedule Assignments form (TASSCR) will display the next Schedule Assignment.

For practice, click on Yes or press Enter.

Checking shift assignments for 8 and 14 week rotation patterns

Use the Display Sub-Schedule Nbr For Crew 8-Wk form (CRWTST) to display information about a shift assignment.

1. Access either the Display Sub-Schedule Nbr For Crew 8-Wk form (CRWTST), or the Display Sub-Schedule Nbr For Crew 14-Wk form (C14TST)

Access these forms by making the following selection from the navigator:

Component: Time and Attendance
Process: View Crew Rotations
Task: 8 Wk Sub-Schedules

Component: Time and Attendance
Process: View Crew Rotations
Task: 14 Wk Sub-Schedules

For Practice, access the Display Sub-Schedule Nbr For Crew 8-Wk form (CRWTST).

2. Enter crew number

Enter the ID of the crew, whose shift assignment you want to check.

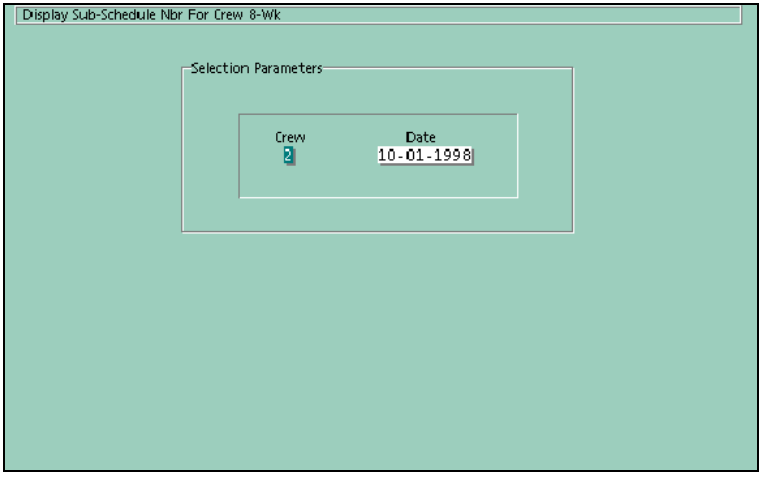
For Practice, type '2'.

3. Enter the date you want to check

Enter date for the shift assignment you want to check. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For Practice, type '10-01-1998'.

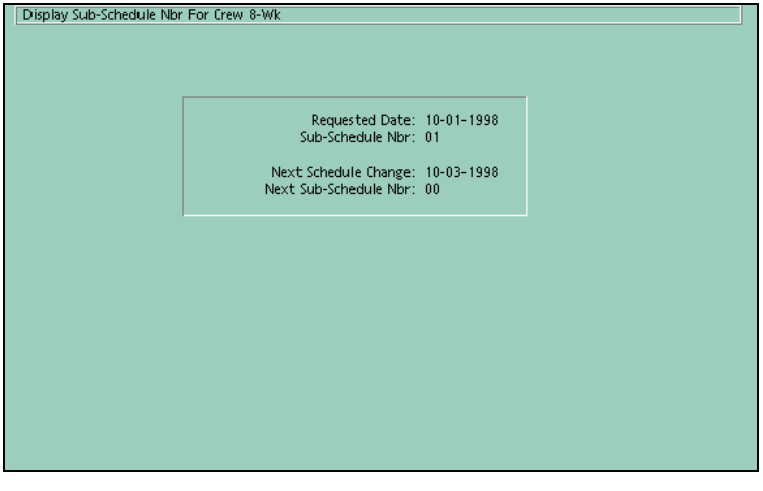
If you completed the Guided Practice, the results should look similar to the example that follows:



4. Click Save or press Enter

If you completed the Guided Practice, the results should look similar to the example that follows:

For practice, click Save or press Enter.



See also:

- **Checking an employee's schedule assignments** ***(on page 212)***

If you need to find out what schedules an employee is assigned to for a particular date.

- **Schedule Assignments report (6G-RPT *(see "Schedule Assignments report (6G-RPT)" on page 390)*)**

Refer to Report Quick Reference for information on Schedule Reports.

- **Scheduling Report (6G1RPT *(see "Scheduling Report (6G1RPT)" on page 394)*)**

Refer to Report Quick Reference for information on Schedule Reports.

- **Time and Attendance Schedule Table report (6H-RPT *(see "Time and Attendance Schedule Table report (6H-RPT)" on page 396)*)**

Refer to Report Quick Reference for information on Schedule Reports.

Review of Questions Answered

1. How do you assign an individual employee to a Schedule Master table?

2. How do you assign groups of employees to a Schedule Master table?

3. How do you check an employee's schedule assignments?

4. How do you check the rotation pattern for a particular crew?

PART 4

Administering Time and Attendance

In This Section

CHAPTER 10

Tracking Employee Absences

In This Chapter

Introduction

The ability to anticipate excused absences and to deal with unexcused absences before they become a significant problem can minimize the disruptions that invariably result when an employee is absent. This section describes how you can effectively track your employee absences by gathering a solid base of absence information. This absence information will be used to create time entries that are used to feed the payroll process.

Tasks

The following tasks are explained in this section:

- Setting up paid absence types
- Recording employee absences
- Viewing employee absences
- Viewing employee absences by type
- Viewing employee absences by points

Prerequisites

Before you can record absence data for your employees, you must have set up your policies, schedules, and rotation patterns. Additionally, you must have assigned your employee badges and assigned them to Time and Attendance.

☞ *Refer to Sections 5 through 9 for details on meeting these prerequisites.*

Questions answered

The following questions are answered in this section:

1. How are employee absences used by Time and Attendance Administration?
2. What choices do you have when recording employee absences?
3. What queries and reports are used to track absences?

Employee absences and time entries

When an employee is absent from work, the ability to assign the type of absence the employee has taken is crucial to managing absences. Setting up the absence types that your organization uses will allow you to track your employee absences effectively, always knowing the reason the employee was not at work and being able to spot trends in absence patterns.

Cyborg delivers a common set of absence types in options list 'Absence Type'. You can add, change, or delete these absence types to meet the needs of your organization. Some common absence types from the options list are shown below.

- Excused Absence
- Holiday
- Jury Duty
- Sick
- Tardy to Work
- Unexcused Absence
- Workers Compensation

As you can see from this list, absence types can include tardiness. If an employee is absent for part of the day you can decide whether or not to pay the employee.

Paid and unpaid absences

Absences can be paid by the company or they can be unpaid. When an employee is not at work and is assigned a paid absence type, they may be paid for this time. You assign a HED to your paid absences. Time entries are created using this information. When an employee is not at work and is assigned an unpaid absence type, they are not paid for this time. No HED is assigned for unpaid absence types.

Use of the Absence Type/HED Number Cross Reference form

The Absence Type/HED Number Cross Reference form (TAASCR) is used to set up the different types of absences your organization uses, both paid and unpaid. It is on this form that you can tie an HED to each of your paid absences. The text boxes on this form will be used when time entries are created for your absences.

Absence types can be set up for different employee statuses, such as for your full time employees, part time employees, and so forth. You should set up an Absence Type/HED Number Cross Reference form (TAASCR) by employee status for each of the paid absence types your organization uses. Employee status is defined on the Employee Information form (EF-SCR).

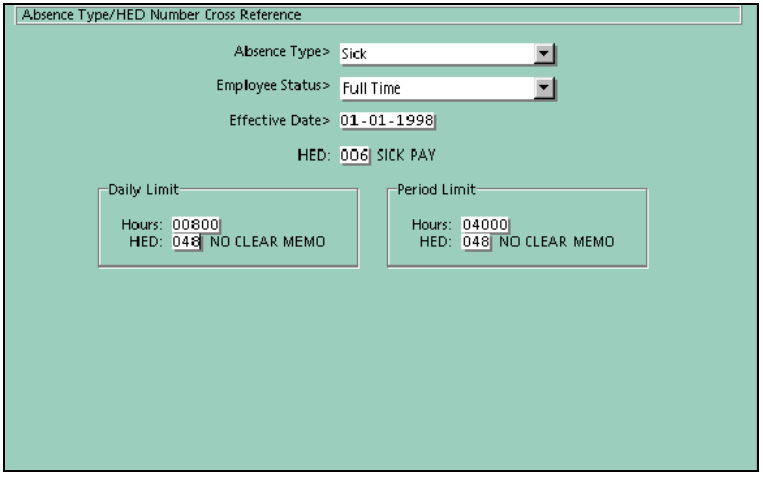
You can also set a limit on the maximum number of hours an employee can be paid for each paid absence type. This can be done on a daily or payroll period basis. You must assign an HED to which these hours over the daily or payroll period limit can be posted.

This chart shows some common paid absence types that a typical organization might have, including the HED that is assigned to each absence. The maximum daily and payroll period

hourly limits and the HED to assign any excess hours are also shown. It may be helpful for you to produce a chart similar to this with your absence types and rules.

Absence Type	HED	Daily Limit	Payroll Period Limit
Excused Absence	020	Up to eight hours are paid per day.	Up to 16 hours are paid per payroll period. Any amount over the payroll period limit is charged to the employee's vacation HED.
Paternity Leave	010	Up to eight hours are paid per day.	Up to 24 hours are paid per payroll period. Any amount over the payroll period limit is charged to the employee's vacation HED.
Personal Days	004	Up to eight hours are paid per day.	Up to 16 hours are paid per payroll period. Any amount over the payroll period limit is charged to the employee's vacation HED.
Sick Days	006	Up to eight hours are paid per day.	Up to 40 hours are paid per payroll period.
Vacation	008	Up to eight hours are paid per day.	Up to 40 hours are paid per payroll period.

The following is an example of the Absence Type/HED Number Cross Reference form (TAASCR) that has been set up for a sick day absence. The Absence Type of 'Sick' has been set up as a paid absence to HED 006 (Sick Pay). The daily maximum number of hours is eight and the payroll period maximum is 40. The hours over the limit are posted to a memo HED (048).



Apply the Concept

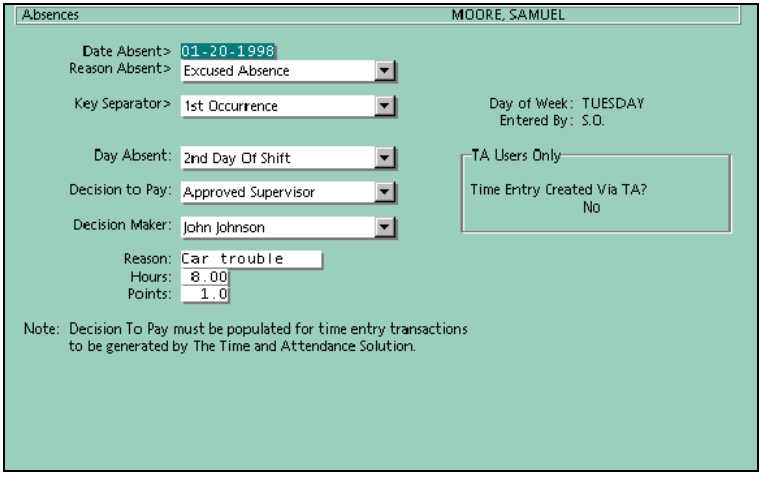
What types of paid absences will you use in your organization?

Choices when recording employee absences

Once you have set up the different types of absences in your organization, you should record your employee absences on a daily basis. The type of absence, number of hours absent, whether the absence will be paid, and the name of the person who made that decision are among the elements that can be recorded. When you determine if an absence will be paid, you select one of the approval or denial options from options list 'Absence Approval'. This options list can be customized to meet the needs of your organization. Codes starting with 'A' (Approved) can have time entries created. Codes starting with 'D' (Denied) will not have time entries created for them. The decision maker can be selected from options list 'Decision Maker'.

Also, the relationship the day of the absence has to a holiday or to the day of the employee's shift can be recorded. This information can be used to determine absence trends as related to holidays or other non-workdays.

Employee absences are recorded on the Absences form (93-SCR). This absences data will be used to create time entries. Once a time entry has been created using the data, the informational recess box on this form will indicate this. An example of this form is shown below, with Samuel Moore taking an excused absence day on 01-20-1998. Please note that a time entry has not yet been created.



The Absence Inquiry form can be used to view the absence information recorded on the 93-SCR in Inquiry Mode.

Absences by type

It is often useful to be able to view all of the absences of a single absence type an employee has had. For example, you may want to view the number of sick days an employee has taken over a specified period of years, months, and days. This can be accomplished using the Absence Inquiry By Type form (93TSCR).

Absence points

When you record an absence for an employee, you can assign a number of absence points to the absence. The number of absence points you assign for an absence is up to you. By summarizing the number of absence points an employee has accumulated over a period of time, you can determine if the employee is within the allowable number of absence points. If not, you may want to pursue some form of disciplinary action.

For example, you could assign one absence point to an employee for each excused absence and two absence points for each unexcused absence from work. At the end of a sixth month period, you could send all employees that exceed a total of five absence points a written warning that their attendance must improve in the next six months.

Absence point totals can be summarized by employee on the Absence Points form (93PSCR). You can enter the number of years, months, and days to search for absences and summarize their assigned absence points from the current date.

Tracking employees absences

Time and Attendance Administration is delivered with a variety of online queries and packaged reports that can be used to track employee absences. The charts below include a brief description of each of these tools.

Queries

Query	Descriptions
ABSENT	Lists all scheduled employees who have not clocked in within a specified time range
APPROV	Lists all approved absences for selected employees
DENIED	Lists all denied absences for selected employees
ROSTER	Lists the clock in date and time for selected employees
STATUS	Lists absence information for selected employees
TRACK	Lists the total number of absences for each employee
TYPE	Lists absences by type of absence

☞ *Refer to* **Queries and Maintenance** *(on page 487) for more information on Time and Attendance queries.*

Packaged reports

Report	Descriptions
Absence Record by Employee - Specified Period (6B2RPT)	Lists employees who have been absent within a range of dates.
Absence Record by Date (6B1RPT)	Lists employees who have been absent in date order.
Absence Record by Employee - Group (6B2RPT)	Lists employees who have been absent in employee number order.
Absence Record by Type (6B3RPT)	Lists employees who have been absent by absence type.
Absence Record Summary (6B4RPT)	Summarizes absences information over a period of time.
Absence Record by Employee - Individual (6B2RPT)	Lists employees who have been absent in employee number order.
Absence Log by Type (6C-RPT)	List employees who have been absent for a specified absence type.

Report	Descriptions
Approved Absence (GN1RPT)	Lists all absences that have been approved for payment.
Paid/Non-paid Absence (6N2RPT)	Lists all absences, grouping paid and non-paid absences.
Absence - Time Entries Generated	Lists all absences that have been approved for payment and indicates if a time entry has been created for each absence.
Unexcused Absence Information (6U1RPT)	Lists all unexcused absences.
Denied Absence (6U2RPT)	Lists all absences that have been denied pay.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Setting up paid absence types

This task should be performed to set up all of the absence types that are used by your organization.

The guided practice below sets up an absence table record for an organization's paid absences.

1. Access the Absence Type/HED Number Cross Reference form (TAASCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Set up TA Rules
Task: Assign HEDs to Absent

For practice, access the Absence Type/HED Number Cross Reference form (TAASCR).

2. Clear the form

Clear the form using the Clear button on the toolbar.

For practice, clear the form by clicking on the Clear button on the toolbar.

3. Select the Absence Type

Select the type of absence from options list 'Absence Type'.

For practice, select 'Excused Absence'.

4. Select the Employee Status (optional)

This selection allows you to establish absence types for groups of employees, such as 'Full Time' employees, 'Part Time' employees, and so forth.

For practice, select 'Full Time'.

5. Enter the Effective Date

This is the date that this absence type becomes effective. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type a date of '01-01-1998'.

6. Enter a HED

The three-digit HED value entered here will be used to create the time entries for this absence.

For practice, type '111' for the excused absence HED.

7. Enter a Daily Limit Hours (optional)

Enter the number of hours that can be worked daily before the hours that exceed this limit will be assigned to a different HED.

For practice, type '800' for eight hours.

8. Enter a Daily Limit HED (optional)

Enter the three-digit HED value to which the number of hours that exceed the limit set in the Daily Limit Hours text box will be assigned.

For practice, type '044'.

9. Enter a Period Limit Hours (optional)

Enter the number of hours that can be worked in a payroll period before the hours that exceed this limit will be assigned to a different HED.

For practice, type '1600' for 16 hours.

10. Enter a Period Limit HED (optional)

Enter the three-digit HED value to which the number of hours that exceed the limit set in the Period Limit Hours text box will be assigned.

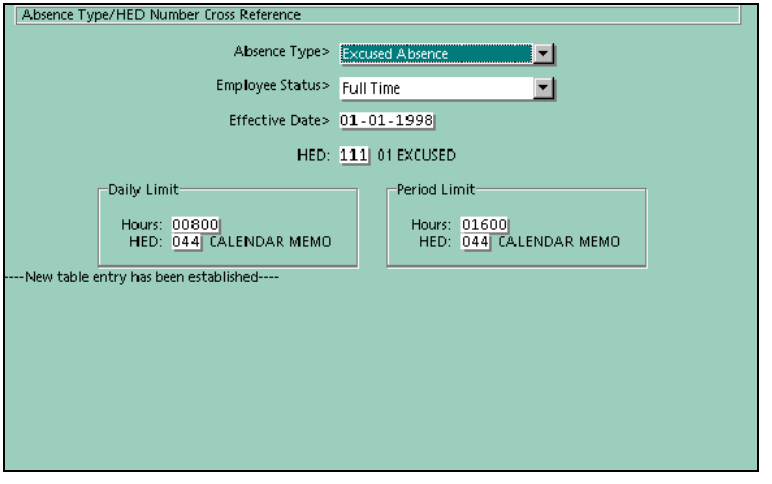
For practice, type '044'.

11. Click Save or press Enter

The absence table entry is established.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Employee absences and time entries ***(on page 235)***

For a discussion about setting up your absences.

Recording employee absences

1. Access the Absences form (93-SCR)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: Absences

For practice, access the Absences form for employee number 1002.

2. Enter the Date Absent

Enter the date of the absence. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type '01-20-1998'.

3. Select the Reason Absent

This text box is cross-referenced to the Absent Type on the Absence Type/HED Number Cross Reference form (TAASCR).

For practice, select 'Excused Absence'.

4. Select the Key Separator

This list box allows you to have multiple absence entries for the same Date Absent and Reason Absent. Up to nine occurrences are allowed. Do not select this list box if this is the first occurrence.

For practice, leave this list box blank.

5. Select the Day Absent (optional)

Enter the day in the employee's payroll period on which the absence occurs.

For practice, select '2nd Day of Shift'.

6. Select the Decision to Pay (optional)

This list box allows you to approve or deny payment for the absence. You must make an approved selection here for time entries to be generated.

For practice, select 'Approved Supervisor'.

7. Select the Decision Maker (optional)

Select the person who approved or denied pay for the absence.

For practice, select 'John Johnson'.

8. Enter the Reason (optional)

This is an informational text box that can be entered.

For practice, type 'Car Trouble'.

9. Enter the Hours (optional)

Enter the number of hours the employee was absent from work. If this text box is left blank, a dialog box with a warning is displayed. Click the OK button to override the warning.

For practice, type '8.00'.

10. Enter the Points (optional)

Enter the number of points that represents this absence. These points are tracked on the Absence Points form to aid in disciplining employees for excessive absences and tardiness.

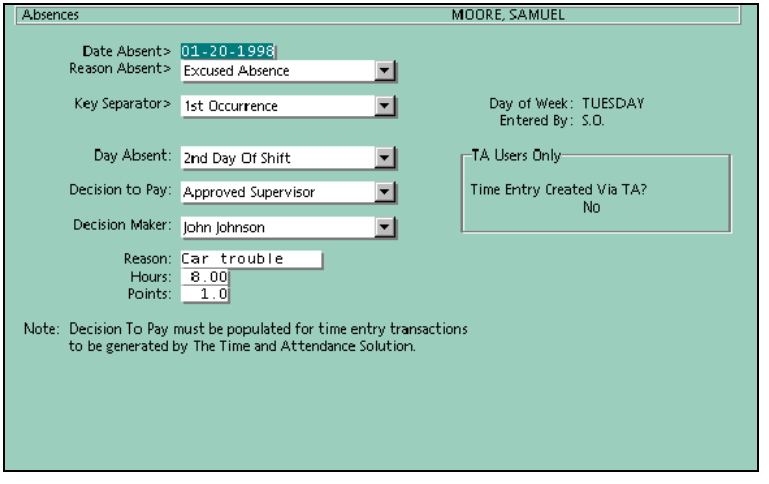
For practice, type '1.0'.

11. Click Save or press Enter

The absence entry is established. The day of the week the absence occurred is displayed in Inquiry mode, as is the User ID for the person who entered this form. You are also informed if a time entry has been created for this absence. Because you have not yet created time entries for this date, the answer is 'No'.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Choices when recording employee absences ***(on page 238)***

For a discussion about recording absences for your employees.

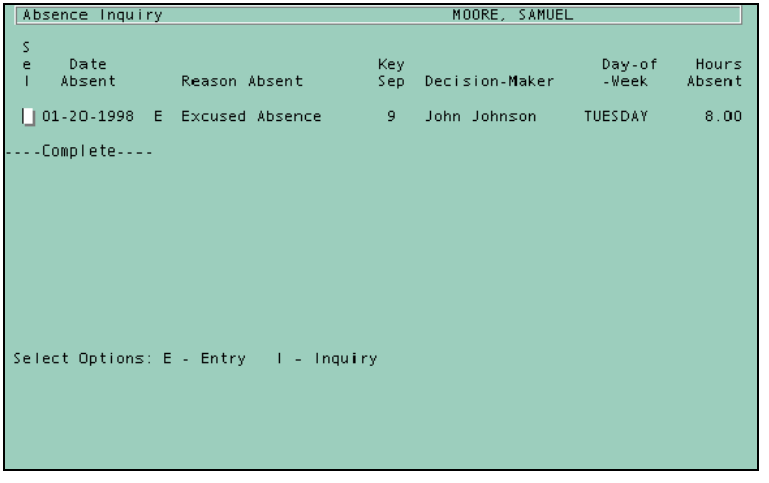
Viewing employee absences

1. Access the Absence Inquiry form (93-SCR)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: View Absences

For practice, access the Absence Inquiry form (93-SCR) for employee number 1002.



2. Enter the Sel

In the Selection text box, enter an 'E' for Entry or an 'I' for Inquiry for the absence you want to view. The Entry option displays the Absences form for the absence. The Inquiry option displays an Absence detail form panel that lists the absence information in Inquiry mode.

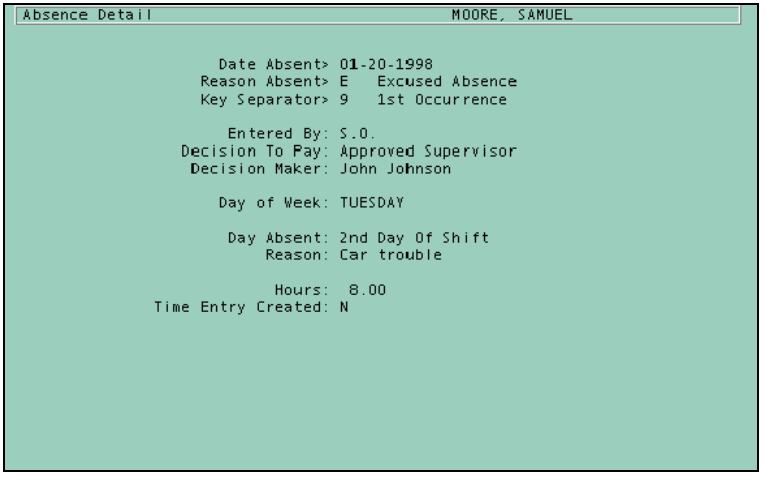
For practice, type an 'I'.

3. Click Save or press Enter

The appropriate form panel is displayed according to your entry in the Selection text box.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Choices when recording employee absences ***(on page 238)***

For a discussion about recording and viewing your employee's absences.

Viewing employee absences by type

1. Access the Absence Inquiry By Type form (93TSCR)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: View Absences by Type

For practice, access the Absence Inquiry By Type form (93TSCR) for employee number 1236.

2. Select the Absence Type

Select the type of absence you want to view from options list 'Absence Type'.

For practice, select 'Tardy to Work'.

3. Enter a Date Range (optional)

Enter the date span you want to search in number of years, months, and days in YYMMDD format. For example, an entry of '010300' will search one year and three months back from the current system date.

For practice, leave this text box blank.

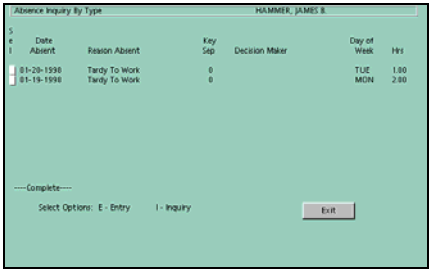
4. Click Save or press Enter

The absence records for the type you specified are displayed. You can now access the absence records using the same method as used on the Absence Inquiry form (93-SCR).

For practice, click Save or press Enter.

See **Viewing employee absences** *(on page 246), for the steps to follow to access absence records in Inquiry mode.*

If you completed the Guided Practice, the results should look similar to the example that follows:



Note: *Click on the Exit button to return to the first form panel.*

See also:

- Choices when recording employee absences ***(on page 238)***

For a discussion about recording and viewing your employee's absences by type.

Viewing employee absences by points

1. Access the Absence Points form (93PSCR)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: View Absences with Points

For practice, access the Absence Points form (93PSCR) for employee number 1236.

2. Enter a Date Range

Enter the date span you want to search in number of years, months, and days in YYMMDD format. For example, an entry of '010300' will search one year and three months back from the current system date.

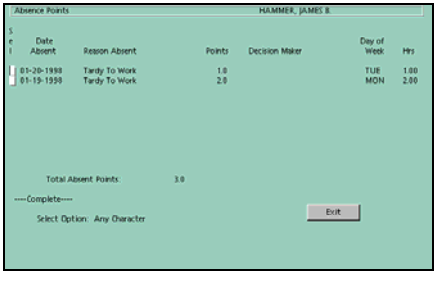
For practice, type '990000' for 99 years, 0 months, and 0 days.

3. Click Save or press Enter

The absence points for the date range you specified and the total absence points for those absence records are displayed. You can now access the absence records using the same method as used on the Absence Inquiry form (93-SCR).

For practice, click Save or press Enter.

See **Viewing employee absences** *(on page 246), for the steps to follow to access absence records in Inquiry mode.*



Note: Click on the Exit button to return to the first form panel.

See also:

- Choices when recording employee absence ***(see "Choices when recording employee absences" on page 238)***s ***(see "Choices when recording employee absences" on page 238)***

For a discussion about recording and viewing your employee's absence points.

Review of Questions Answered

1. What are the different types of employee absences?

2. What choices do you have when recording employee absences?

3. What queries and reports are used to track absences?

CHAPTER 11

Capturing Employee Work Time

In This Chapter

Introduction

This section describes how to capture employee work time. It explains how to apply clock transactions (rings) to the Employee Database, validate the clock transactions (rings), address clock transaction (ring) exceptions and errors, and correct any clock transaction (ring) errors that occur. The validated clock transaction (ring) will be used to create time entries to feed the payroll process.

Tasks

The following tasks are discussed in this section:

- Applying clock transactions (rings) to the Employee Database
- Viewing a Ring Transaction report (FILE03)
- Viewing clock transactions (rings) on the Employee Database
- Correcting badge errors
- Validating clock transactions (rings)
- Viewing clock transaction (ring) errors
- Correcting clock transactions (rings)
- Revalidating clock transactions (rings)
- Reviewing clock transaction (ring) errors

Prerequisites

Before you can begin to capture employee work time, you must set up the following:

- Policy and schedule tables
- Rotation patterns
- Employee badges
- Employees assigned to policies and schedules

Refer to Sections 5 through 9 for more information.

Questions answered

The following questions are answered in this section:

1. What is the process that is used to capture employee work time?
2. What are clock transactions (rings) and how are they used?

3. How are clock transactions (rings) validated and why?
4. How are errors corrected and why?

Process used to capture employee work time

Time and Attendance Administration captures employee work time in order to feed the payroll process. To do this, the following functions must be completed:

1. Upload/apply clock transactions (rings) to the Employee Database

When a badge is swiped through a clock, a clock transaction (ring) is created and is stored on the clock or in a ring transaction file. Clock transactions (rings) are records containing the information needed to create time entries for payroll processing. Clock transaction (ring) information includes date, time, and badge number. Your clock communication software extracts the clock transactions (rings) from the clocks and builds a Rings file(s). These clock transaction (ring) records are then applied to the Employee Database.

2. Validate clock transactions (rings)

Clock transactions (rings) must be checked against the policy and schedule tables to determine which clock transactions (rings) are valid and invalid. Valid clock transactions (rings) are assigned an activity code (1 through 9), which assigns the clock transaction (ring) activity, such as Clock Start, Meal Start, or Clock End. Invalid clock transactions (rings) are identified as 'schedule errors' because the clock transaction (ring) time is outside of the 'reject' times on the employee schedule. Clock transactions (rings) that are assigned warning messages based on the employee's schedule are considered valid and are assigned an activity code. The Time Entry Validation/Creation form (TMCARD) is used to perform the validation and assignment of activity codes.

3. Review/correct clock transactions (rings)

You must review the clock transactions (rings) with schedule errors and correct them for time entries to be generated for a particular date for an employee. This is done using the Error Correction form (TAESCR). This form may display clock transactions (rings) only for days where a warning or error is present, or all clock transactions (rings) for an employee. Clock transactions (rings) with warning messages containing clock transaction (ring) activity codes are not invalid; therefore they do not have to be corrected. The Ring Errors form (RING03) can be used to summarize schedule errors and warnings in inquiry mode. No corrections can be made on this form.

4. Revalidate clock transactions (rings)

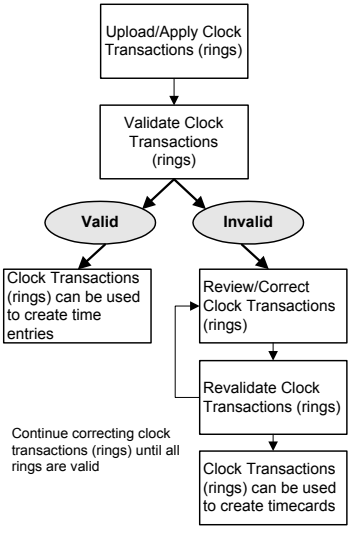
Clock transactions (rings) are usually revalidated until no more schedule errors are present. This is done using the Time Entry Validation/Creation form (TMCARD).

5. Review/correct rings

Clock transactions (rings) are reviewed and corrected until no more schedule errors are present.

Process map

This process map shows the functions used to validate and correct your clock transaction (ring) records.



Understanding clock transactions (rings)

Clock transactions (rings) are records containing the information needed to create time entries for payroll processing. When a badge is swiped through a clock, a clock transaction (ring) is created. Your clock communication software extracts the clock transactions (rings) from the clocks and builds a clock transaction (ring) file(s). The clock transaction (ring) records are applied to the Employee Database, where the clock transactions (rings) are validated, errors are corrected, and time entries can be created.

The Correct Badge Errors program applies the clock transactions (rings) to the Employee Database. It is run in batch, usually on a daily basis. This program also creates a Rings Transaction report (FILE03), which can be reviewed to determine exactly which rings were processed and the status of the clock transactions (rings).

A clock transaction (ring) record is 64 characters in length. Its layout is shown below.

Clock transaction (ring) record layout

```
         1         2         3         4         5         6
....5....0....5....0....5....0....5....0....5....0....5....0....
S00198010108000199999911111111113333444455556666FFFFFFFFF0011XX
```

In these positions	Enter	Description
1	Supervisor Flag	'S' if the badge has been encoded as a supervisor badge; otherwise leave blank.
2-4	Clock ID	Station ID for the clock
5-10	Clock transaction (ring) date	Date of the clock transaction (ring) in YYMMDD format
11-14	Clock transaction (ring) time	Time of the clock transaction (ring) in HHMM format. Military time (24 hour clock) is used.
15-16	Clock transaction (ring) activity code	Activity code, if entered at the clock
17-22	Organization	Employee's organization
23-32	Badge number	Employee's badge number
33-36	Ring organization 3	Organization level three, if entered at the clock
37-40	Ring organization 4	Organization level four, if entered at the clock
41-44	Ring organization 5	Organization level five, if entered at the clock
45-48	Ring organization 6	Organization level six, if entered at the clock

In these positions	Enter	Description
49-58	Ring function	Function value, if entered at the clock
59-61	HED number	Earnings code, if entered at the clock
62	Shift code	Shift code, if entered at the clock
63-64	Check digit and carriage return	Internal items that are not part of the clock transaction (ring) record

Apply the Concept
How often will the RINGS program be run in your organization?

Validation of clock transactions (rings)

Before time entries can be created using the Correct Badge Errors program, the clock transaction (ring) records must be checked against the policy and schedule tables to determine which clock transactions (rings) are valid and invalid.

Each clock transaction (ring) record is validated against the employee's schedule. If the time of the clock transaction (ring) falls within the times defined on the schedule, an activity code such as Meal Start is assigned to the clock transaction (ring).

If the clock transaction (ring) time is outside the schedule reject times, the clock transaction (ring) is invalid and a schedule error is assigned to the activity. In this case, the rest of that day's clock transactions (rings) are bypassed for the employee.

Clock transactions (rings) that are assigned warning messages based on the employee's schedule are considered valid and are assigned an activity code.

Activity codes

When a clock transaction (ring) is validated, an activity code is assigned to the clock transaction (ring). The activity code defines what the clock transaction (ring) represents in relation to a shift. Valid activity codes are listed in the Policy Activity options list shown in the chart below:

Activity	Code
Clock Start	1
Break Start	2
Break End	3
Meal Start	4
Meal End	5
Break Start	6
Break End	7
Clock End	8
Labor	9

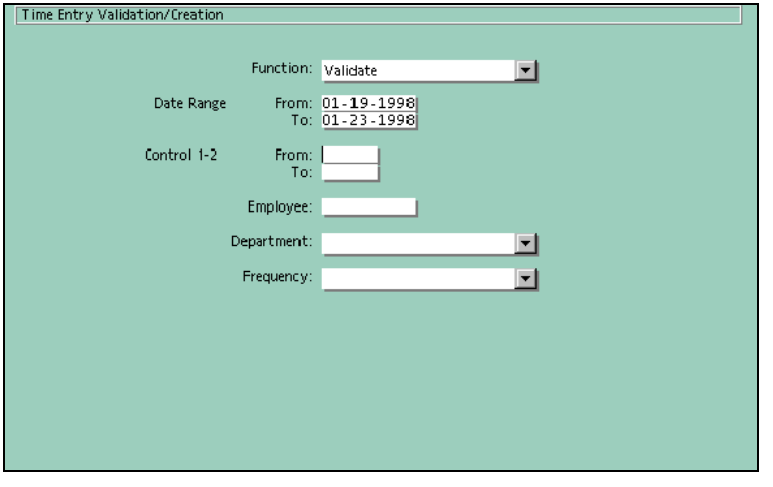
Uses of the Time Entry Validation/Creation form

The Time Entry Validation/Creation form (TMCARD) is used to validate the clock transactions (rings) based on the policy and schedule tables for each employee. This form can also be executed to validate and create time entries on one execution. Another available option is to create time entries from the employee absence data entered on the Absences form (93-SCR).

The Time Entry Validation/Creation form (TMCARD) can be executed using various employee/ring selection criteria, which limits the number of rings that are processed. A selection panel is displayed when the form is accessed. The types of selection criteria that can be specified include:

- Date Range
- Organization
- Employee
- Department
- Pay Frequency

In the example below the Time Entry Validation/Creation form (TMCARD) has been setup to validate clock transactions (rings) with a ring date range of 01-19-1998 through 01-23-1998.



Badge errors

If a badge is swiped through a clock and creates a clock transaction (ring) record but the badge has not been assigned to an employee, a badge error occurs when the Correct Badge Errors program is run.

If this happens, you must process a Badge Number Assignments form (TABSCR) to assign an employee to each unassigned badge number. Then run the Correct Badge Errors program to correct all of the badge errors. You do not have to rerun the Upload Rings program. Badge errors will not appear as clock transaction (ring) errors after they have been corrected by the Correct Badge Errors program.

Correcting errors Error Correction form

After the Time Entry Validation/Creation form (TMCARD) has been processed, all invalid clock transactions (rings) have been flagged and must be corrected before time entries can be created. The Error Correction form (TAESCR) is used to correct the invalid clock transactions (rings).

Clock transaction (ring) error correction

After the clock transactions (rings) have been validated, it is likely that some of the clock transactions (rings) will be invalid because of schedule errors. The invalid clock transactions (rings) are reviewed and corrected before creating time entries. This is done using the Error Correction form (TAESCR). The form displays all clock transactions (rings) for a specific employee or it displays clock transaction (ring) exceptions for dates with a warning or schedule error. You are able to scroll through the clock transactions (rings) and display those for the date in which the error or warning condition exists.

To meet or override the requirements of an employee's schedule, clock transactions (rings) can be added, changed, or deactivated/deleted. Clock transactions (rings) that were applied to the Employee Database externally (for example, from clocks) are maintained on the Employee Database for audit purposes. Clock transactions (rings) that were added using the Error Correction form may be deleted. A deactivated clock transaction (ring) is displayed on the TAESCR form with a status of inactive. All other rings will have a status of active.

The Rings Errors form (RING03) summarizes all of the schedule errors and warnings currently on the file in Organization level 4 (department) order.

Selection Criteria

The Error Correction form (TAESCR) allows you to access all schedule error and warning messages by employee, or to enter selection criteria for accessing the records. A selection form panel is provided when the form is accessed. Selection criteria that you can specify include:

- Organization level 3 through Organization level 6
- Pay Frequency
- Shift
- By-pass clock transaction (ring) warning records - display clock transaction (ring) error records only
- Range of Dates
- All employees or a specific employee number

Types of schedule errors

All clock transactions (rings) with schedule errors are flagged and corrected using the Error Correction form (TAESCR) before time entries are created using the data. The chart below lists the possible errors that can occur.

Error	Description
INACTIVE B	Employee's badge number was not found on file. Enter either a valid badge number or update the Badge Number Assignments form with the correct employee data.
BREAK1-ERR	A Break 1 Start clock transaction (ring) was processed but a Break End clock transaction (ring) was not found.

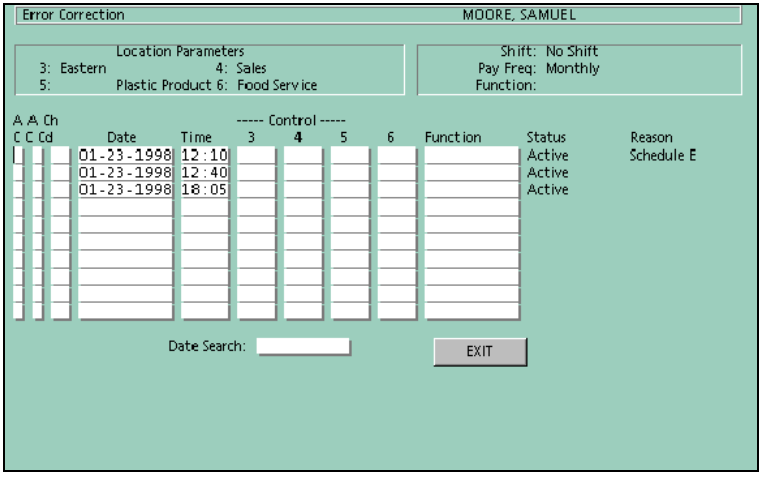
Error	Description
BREAK2-ERR	A Break 2 Start clock transaction (ring) was processed but a Break End clock transaction (ring) was not found.
DEACT BADG	A clock transaction (ring) contains a badge number that has been deactivated.
MEAL	A Meal Start clock transaction (ring) was processed but a Meal End clock transaction (ring) was not found.
SCHEDULE E	A clock transaction (ring) is outside of the reject parameter on the schedule.

Types of clock transaction (ring) warnings

The chart below lists the possible warning messages that can occur:

Error	Description
REQ BRK-1	A Required Punch for the Break 1 Activity was not found.
REQ-BRK-2	A Required Punch for the Break 2 Activity was not found.
REQ MEAL	A Required Punch for a meal activity was not found.
WARNING	The clock transaction (ring) time is outside of the warning parameter on the schedule.

Error and warning messages are displayed on the Error Correction form (TAESCR) under the Reason heading on the far right side of the form, as shown in the following example:



Clock transaction (ring) activity codes

The Time Entry Validation/Creation form (TMCARD) assigns each valid clock transaction (ring) an activity code that defines the activity the clock transaction (ring) represents, for example, Clock Start. However, if a clock transaction (ring) error is detected on that date and shift, no activity codes are assigned for that date/shift clock transaction (ring). You must assign clock transaction (ring) activity codes to the rings that have errors or use a schedule conforming to these clock transaction (ring) times.

Clock transactions (rings) with warning messages are assigned activity codes by TMCARD; they are not considered errors. Activity codes are assigned in the AC (Activity Code) text box on the Error Correction form (TAESCR). The chart below shows the activity codes that are available for use.

Activity	Code
Clock Start	1
Break Start	2
Break End	3
Meal Start	4
Meal End	5
Break Start	6
Break End	7
Clock End	8
Labor	9

Ring change codes

A clock transaction (ring) change code can also be entered for each invalid ring. This entry is optional and for informational purposes only. Clock transaction (ring) change codes are assigned in the Ch Cd text box on the Error Correction form (TAESCR). The clock transaction (ring) change codes available for use are listed in the chart below:

Clock transaction (ring) change code	Code
Clock-in Approved	IA
Clock-in Denied	ID
Left Early	LE
Meal Time Approved	MA
Meal Time Denied	MD
Clock-out Approved	OA
Clock-out Denied	OD
Tardy Arrival Approved	TA
Tardy Arrival Denied	TD

Note: You may populate the 'Ring Change' options list with your own clock transaction (ring) change codes.

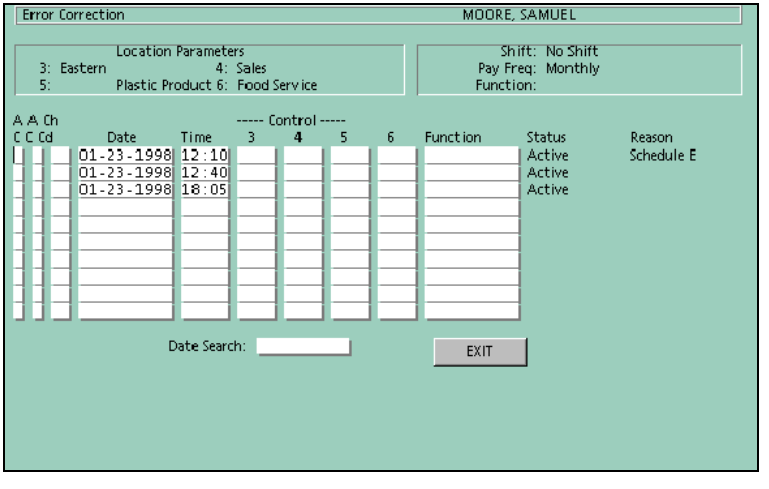
Functions you can perform using the Error Correction form (TAESCR) include:

- Add clock transactions (rings)
- Change clock transactions (rings)
- Deactivate/delete clock transactions (rings)

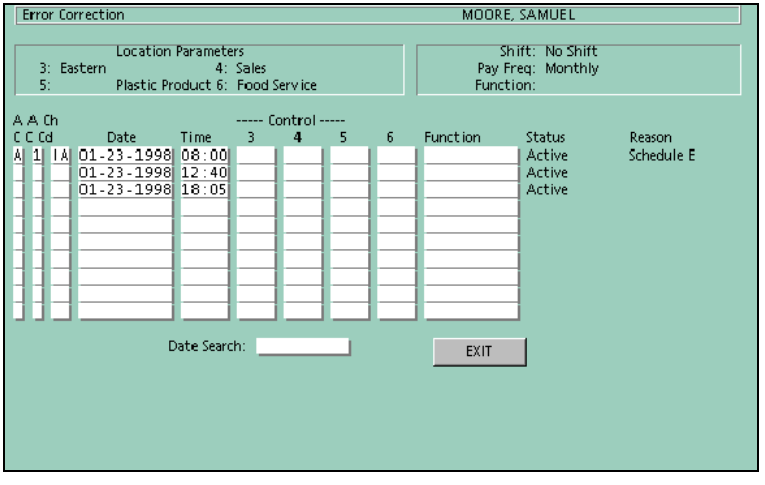
Each of these functions is discussed in more detail below.

Add missing clock transactions (rings)

You may need to add a missing clock transaction (ring), such as a Clock Start or Clock End, if an employee forgets to punch the clock when required to do so. Consider the example below:



A Schedule Error is displayed for 01-23-1998 because Samuel Moore forgot to clock in on this day. Based on the Late Start Reject time for Samuel Moore on the schedule table (for example, 09:00), the Time Card Entry/Validation form (TMCARD) cannot assign an activity code of Clock Start (1) to the first clock transaction (ring). Notice that once a Schedule Error is written, no other activity codes are assigned for the date of this shift. In this case, a clock start activity code should be added. See the example below:

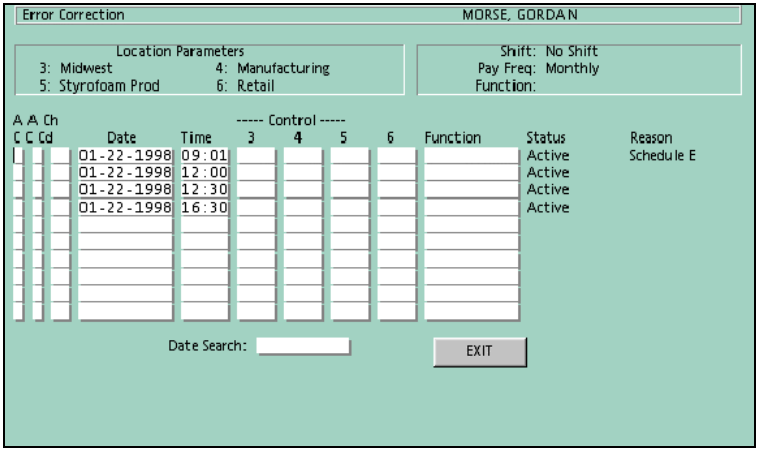


A Clock Start activity code (1) of 08:00 has been added for 01-23-1998. A clock transaction (ring) Change Code of Clock-in Approved (IA) has been entered for this clock transaction (ring).

Note: *You do not have to assign an activity codes to all of the clock transactions (rings). The Time Entry Validation/Creation program can perform this function the next time you validate clock transactions (rings).*

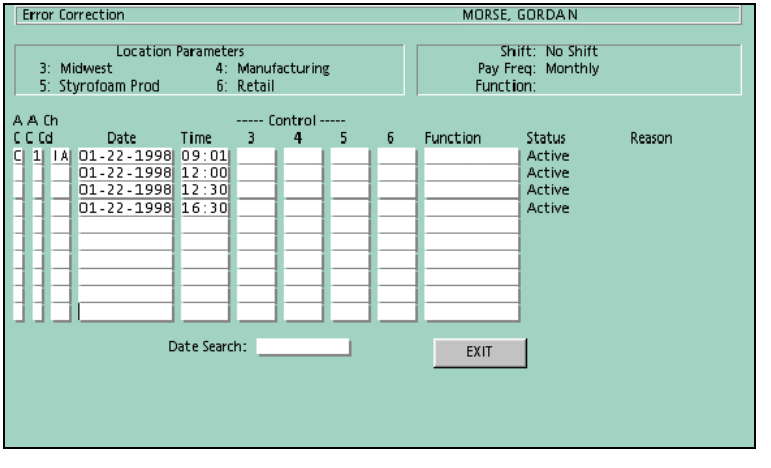
Change clock transactions (rings)

You may need to change a clock transaction (ring) to override a schedule error. Consider the example below:



In this case, a schedule error is displayed for 01-22-1998. The Clock Start time of 09:01 is one minute later than the Late Start Reject time of 09:00 on the schedule table to which Gordan Morse is assigned. This schedule error should be overridden. See the example below.

Note: *Activity codes assigned on the Error Correction form (TAESCR) or at the Time Entry Validation/Creation form (TMCARD) to bypass the validation process for the clock transaction (ring). No schedule error can be generated, unless the employee is missing a schedule assignment.*

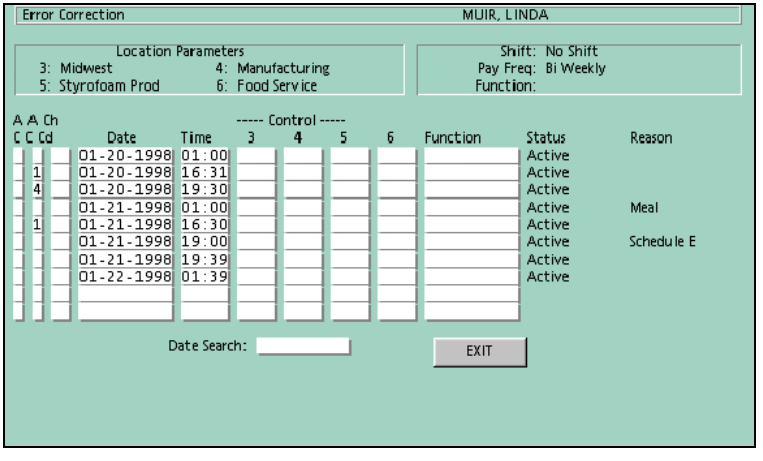


The clock transaction (ring) with the schedule error has been changed and overridden with a Change Code of Clock-in Approved (IA).

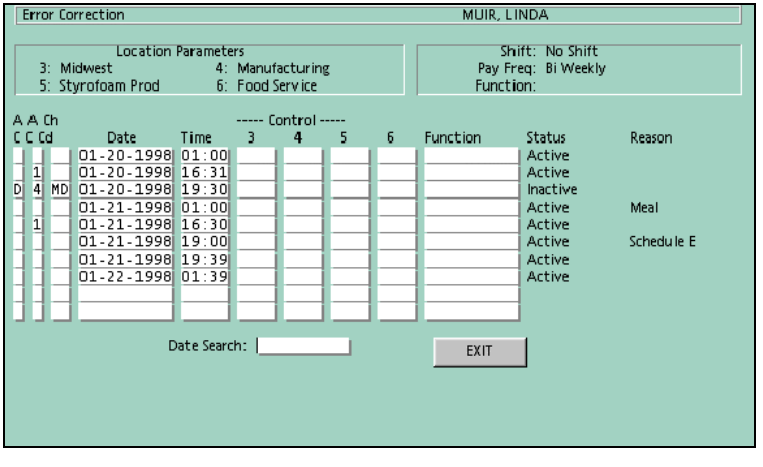
Note: A schedule error for a clock transaction (ring) that is overridden on the Error Correction form (TAESCR) is rewritten to the Employee Database as a clock transaction (ring) warning.

Deactivate/delete clock transactions (rings)

Clock transactions (rings) that are not needed can be deactivated. Consider the following example:



Linda Muir's clock transactions (rings) shown above display a missing meal clock transaction (ring). This clock transaction (ring) can be deactivated, because the Punch Type for the schedule's meal activity is Optional Minimum; a minimum deduction will be taken against the total hours worked.



Additional options

- You can display all clock transactions (rings) (not just errors and warnings) for an employee by accessing the initial Error Correction form panel, clicking on the Employee button, and entering the employee number.
- When using the display all clock transactions (rings) method, entering a 'P' in the Action Code text box will position that clock transaction (ring) record at the top of the form display.
- You can stop scrolling through error records by clicking on the EXIT button. The initial Error Correction form panel is displayed.
- You can display clock transactions (rings) for a specific date by entering the date in CCYYMMDD format in the Date Search text box.

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Applying clock transactions (rings) to the Employee Database

Clock transactions (rings) gathered into files from the clocks must be applied to the Employee Database so they can be processed to create time entries. The Upload Rings program applies the rings to the Employee Database and creates a Rings Transaction report (FILE03).

Run the Upload Rings program as a batch job for the most efficient processing.

File Assignments

Input Files:	FILE01 System Control Repository FILE02 Employee Database FILE04 Run Parameter FILE05 Sequential RING Data File
Output Files:	FILE03 Audit Records (Rings Transaction report)
Execute:	CBSVB

Example of the Control Record File (FILE04):

```
....+....1....+....2....+....3....+....4....+....5.//.0
P JRINGSJ09500  999999RINGS
```

For practice, run the Upload Rings program in batch.

Note: The following special RINGS Control Record File (FILE04) is needed to execute Task 1.

```
....+....1....+....2....+....3....+....4....+....5.//.0
```

```
P JRINGSJ09500  999999RINGS              TNRNGST
```

See also:

- Understanding clock transactions (rings) ***(on page 258)***

For a description of the Upload Rings program.

Viewing a Rings Transaction report (FILE03)

The Rings Transaction report is created automatically each time the Upload Rings program is run in batch and the output is written to FILE03. All rings processed by the Upload Rings program are listed on the report. This includes invalid rings.

Clock transaction (ring) data listed on the report includes the RING Organization, date and time, badge number, and any other data entered at the clock. The report also includes error messages for invalid rings and a rings summary.

For practice, view the Rings Transaction report by opening and printing the contents of FILE03 after running the Upload Rings program. Pay special attention to any clock transaction (ring) errors that occur, as these will have to be corrected.

Viewing clock transactions (rings) on the Employee Database

1. Access the RING Display form (RING02)

Access this form by making the following selection from the navigator:

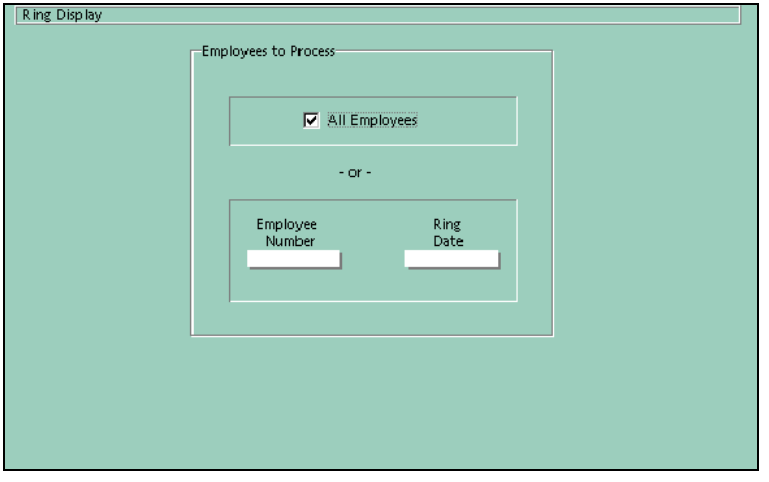
Component: Time and Attendance
Process: Daily Processing
Task: Display Rings

For practice, access the RING Display form (RING02).

2. Select the rings display option you want

Selecting 'All Employees' will display the clock transaction (ring) records on the Employee Database for all of the employees for the Organization you are using. Other clock transaction (ring) display options include by Employee Number or by Employee Number starting with a specific clock transaction (ring) date.

For practice, select the All Employees checkbox.

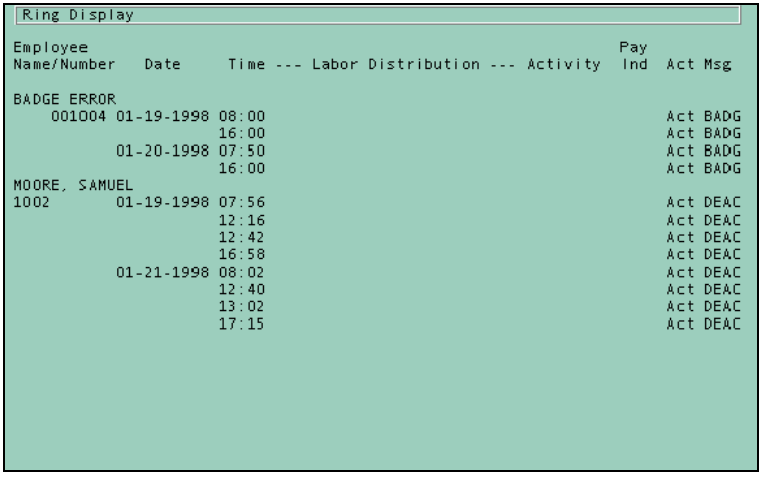


3. Click Save or press Enter

Any rings on the Employee Database are displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Typically, the first clock transaction (ring) records displayed are any badge errors. The invalid badge number is shown. Badge errors occur when a ring's badge number is not

assigned to an employee. A Badge Number Assignment form (TABSCR) should be entered for this badge.

You may continue clicking on the OK button until all of the rings have been viewed and a '----Complete----' message is displayed.

Note: *All valid clock transactions (rings) have been sorted in Employee Number and date and time order. This is done in preparation for time entry processing.*

See also:

- Understanding clock transactions (rings) ***(on page 258)***

For a description of clock transactions (rings).

Correcting badge errors

1. Access the Badge Number Assignments form (TABSCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Setup/Maintain Employee
Task: Assign Badge

For Practice, access the Badge Number Assignments form (TABSCR) for Gordan Morse (1004).

2. Enter the Badge Number

Enter the Badge Number you want to assign to the employee. The Badge Number can be up to ten characters in length.

For practice, type a Badge Number of '001004'.

3. Enter the Issue Date

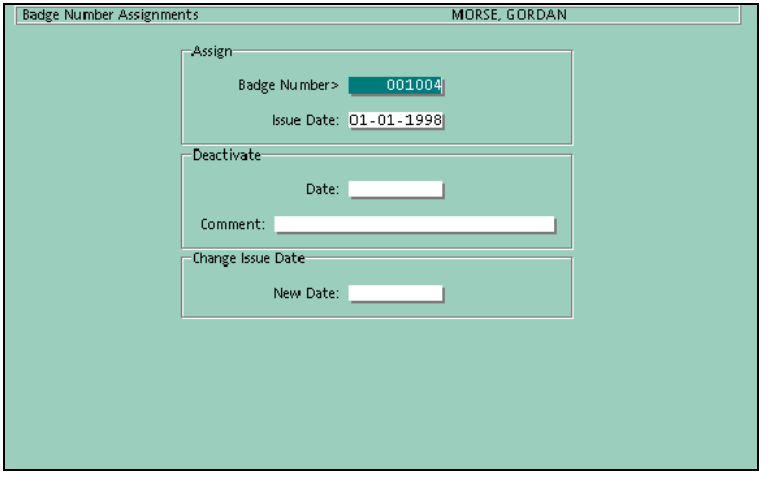
Enter the date the badge was issued. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, type an Issue Date of '01-01-1998'.

4. Click Save or press Enter

The Badge Number is assigned to the employee.

For practice, click Save or press Enter.



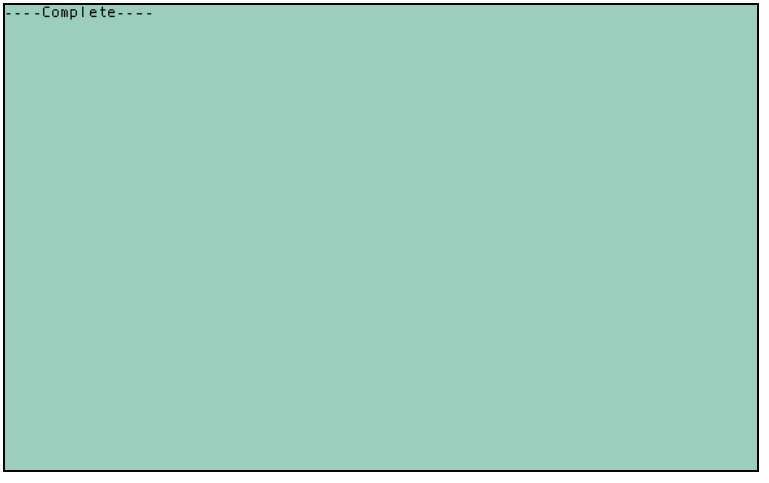
5. Run the Correct Badge Errors program

After you have assigned Badge Numbers to the employees who have badge errors, the Correct Badge Errors program is used to correct the badge errors. Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: Correct Badge Errors

For Practice, access the Correct Badge Errors program.

The badge errors are corrected and a '----Complete----' message is displayed.



6. Access the RING Display form (RING02)

To check that the badge error has been corrected you need to access the Ring Display form (RING02). Access this form by making the following selection from the navigator:

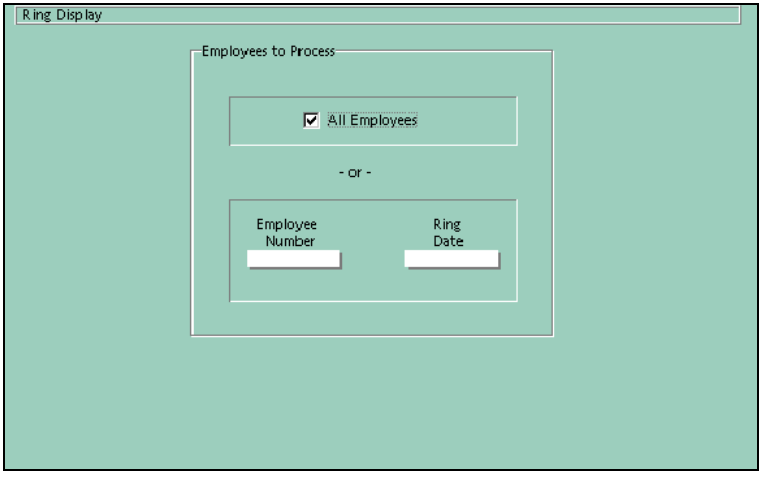
Component: Time and Attendance
Process: Daily Processing
Task: Display Rings

For practice, access the RING Display form (RING02).

7. Select the employees to process

Selecting 'All Employees' will display the clock transaction (ring) records on the Employee Database for all of the employees for the organization you are using. Other clock transaction (ring) display options include by Employee Number or by Employee Number starting with a specific clock transaction (ring) date.

For practice, select the All Employees checkbox.



8. Click Save or press Enter

Any rings on the Employee Database are displayed.

For practice, click Save or press Enter.

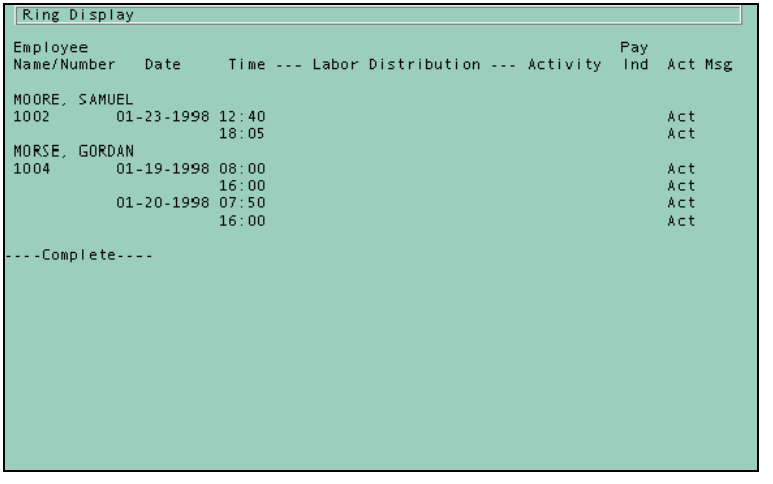
9. Press Enter

To display the Ring Display for employee 1004 you need to access the next page of the Ring Display.

For practice, press Enter.

The clock transactions (rings) record for employee Gordon Morse is displayed. The badge error has been corrected.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Validating clock transactions (rings) ***(on page 277)***

For a discussion about badge errors.

Validating clock transactions (rings)

1. Access the Time Entry Validation/Creation form (TMCARD)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: Validate Rings

For practice, access the Time Entry Validation/Creation form (TMCARD).

2. Select a Function

The selection made here determines the type of processing that will be performed by TMCARD, including validation and time entry creation.

For practice, select 'Validate' to validate the clock transaction (ring) records on the Employee Database.

3. Enter a Date Range

The From and To date entries are used to limit the range of dates for which clock transaction (ring) records are validated. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere). You must enter the From text box. The To text box is optional.

For practice, type a date range of '01-18-1998' through '01-24-1998'.

4. Enter a range of organizations (optional)

The 'From' and 'To' organization entries are used to limit the range of organizations that have clock transaction (ring) records validated. Leave both text boxes blank to process all organizations. To process only one organization, enter the organization value in the From text box.

For practice, type organization '999999'.

5. Enter an Employee (optional)

This entry validates clock transaction (ring) records for a particular employee.

For practice, leave this text box blank.

6. Select a Department (optional)

Entering an organization level 4 value validates clock transaction (ring) records for a single department.

For practice, leave this text box blank.

7. Select a Frequency (optional)

This entry validates clock transaction (ring) records for a single pay frequency.

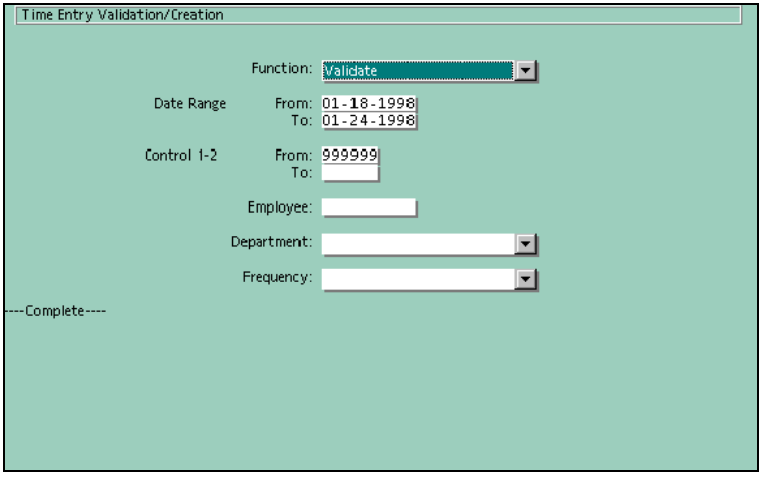
For practice, leave this text box blank.

8. Click Save or press Enter

The clock transaction (ring) records are validated against the schedules and activity codes are assigned to the clock transactions (rings). Time entries are not written to the Employee Database at this point in the process.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Validation of clock transactions (rings) ***(on page 260)***

For a discussion about validating clock transactions (rings).

Viewing clock transaction (ring) Errors

1. Access the RING Errors form (RING03)

Access this form by making the following selection from the navigator:

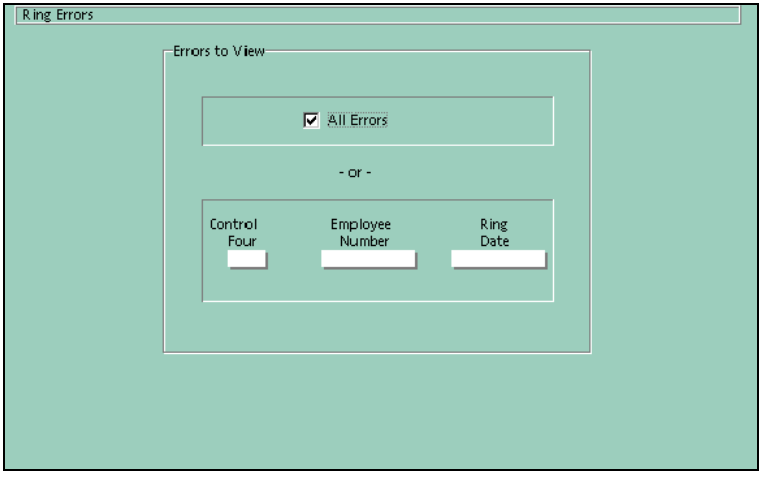
Component: Time and Attendance
Process: Daily Processing
Task: Display Ring Errors

For practice, access the Display RING Errors form (RING03).

2. Select a clock transaction (ring) error display option

Selecting 'All Errors' will display all of the clock transaction (ring) errors and warnings that were discovered by the Time Entry Validation/Creation form (TMCARD). Other clock transaction (ring) error display options include by organization level four, Employee Number, or by clock transaction (ring) date.

For practice, select the All Employees checkbox.

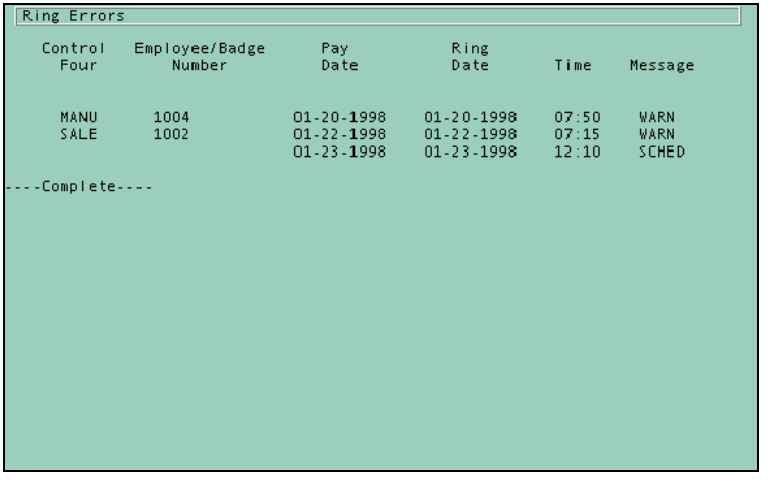


3. Click Save or press Enter

Any clock transaction (ring) errors and warnings on the Employee Database are displayed in organization level four (department) and Employee Number order.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



You may continue clicking on the OK button until all of the clock transactions (rings) have been viewed and a '----Complete----' message is displayed.

See also:

- Clock transaction (ring) error correction ***(on page 262)***

For a discussion about correcting clock transaction (ring) errors.

Correcting clock transactions (rings)

The Error Correction form (TAESCR) is used to perform maintenance on clock transaction (ring) records with errors or warnings.

1. Access the Error Correction form (TAESCR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: Correct Ring Errors

For practice, access the Error Correction form (TAESCR).

2. Select clock transaction (ring) errors by employee organization levels (optional)

Choose from the organization level three, organization level 4, organization level 5, and organization level 6 values. If an employee's organization level matches any of your selections, his or her clock transaction (ring) error records are accessed.

For practice, leave these list boxes blank.

3. Select Pay Frequency (optional)

Select a Pay Frequency if you want to include this as part of the selection criteria.

For practice, leave this list box blank.

4. Select Shift (optional)

Select a Shift if you want to include this as part of the selection criteria.

For practice, leave this list box blank.

5. Select By-pass Warnings (optional)

Select this checkbox if you want to by pass any clock transaction (ring) warning records.

For practice, leave this list box blank.

6. Enter Optional Date Range (optional)

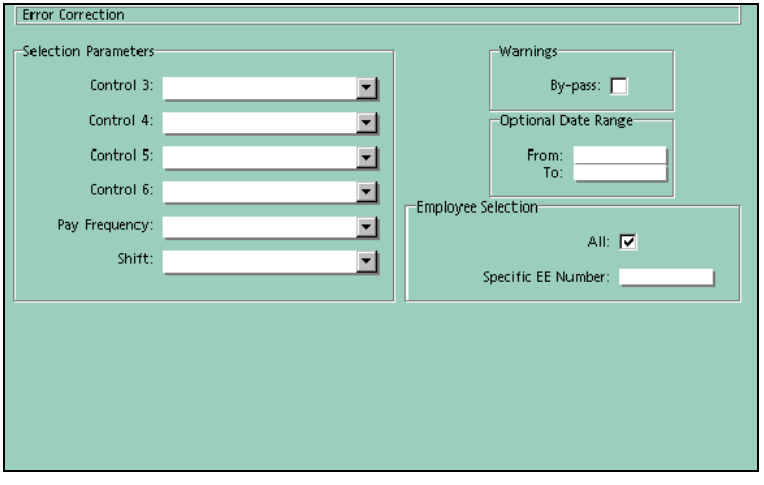
Use the From and To dates to limit the error record selection to within the range of dates. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, leave this text box blank.

7. Select Employee Selection (optional)

Select the All checkbox to access error records for all employees. Enter an employee number in Specific EE Number to access clock transaction (ring) error records for that employee only.

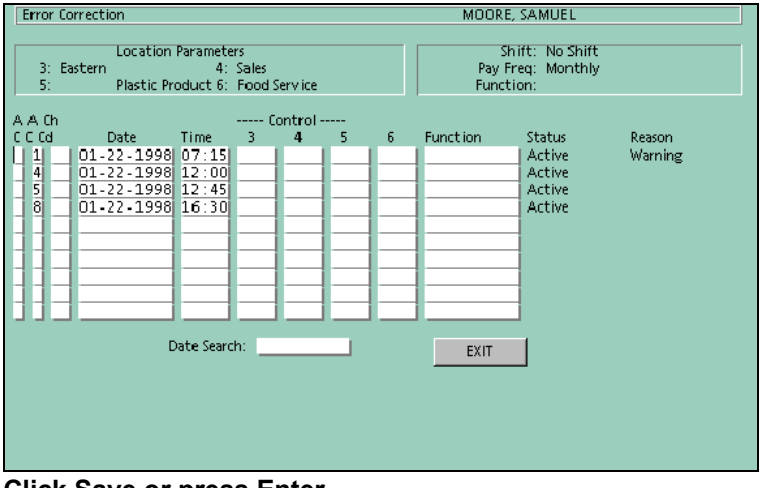
For practice, select the All checkbox.



8. Click Save or press Enter

Clock transaction (ring) records are displayed for the first employee that meets the selection criteria that you entered.

For practice, click Save or press Enter. The clock transaction (ring) records are displayed for Samuel Moore (1002) for 01-22-1998 because the Clock In clock transaction (ring) produced a Warning message.



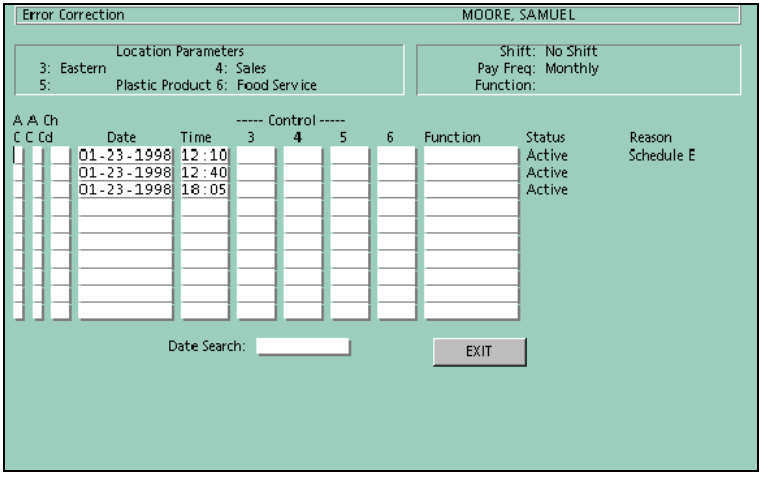
9. Click Save or press Enter

Clock transaction (ring) records are displayed for the next day with a warning or error message for the same employee or for the next employee that meets the criteria you entered.

For practice, click OK or press Enter. The clock transaction (ring) records are displayed for the same employee, Samuel Moore (1002), for 01-23-1998 because of a schedule error.

The Time Entry Validation/Creation form (TAESCR) cannot assign an activity code of Clock Start (1) to the first clock transaction (ring); the time of 12:10 is outside of the error parameter (Late Start Reject) on the schedule.

A Clock Start activity code should now be added for this employee and date.



Note *Once a Schedule Error is written, no other clock transaction (ring) codes are assigned for this date or shift for the employee.*

10. Enter the Action Code text box on the first line

The Action Code text box is labeled AC and is the farthest left text box on the form. Valid entries are 'A' (add), 'C' (change), and 'D' (delete).

For practice, type 'A' in the Action code.

11. Enter the Activity Code text box

This is the next text box and is labeled AC. Valid entries are:

	Code
Clock Start	1
Break Start	2
Break End	3
Meal Start	4
Meal End	5
Break Start	6

Break End	7
Clock End	8
Labor	9

For practice, type a '1' for Clock Start.

12. Enter the Change Code (optional)

This optional text box is located to the right of the Activity Code text box and is labeled Ch Cd. This text box is for informational use only. Valid entries are:

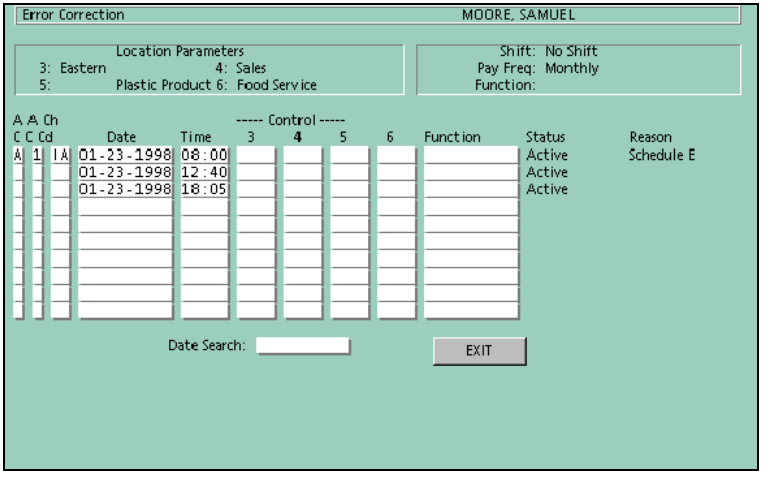
Clock transaction (ring) change code	**Code**
Clock-in Approved	IA
Clock-in Denied	ID
Left Early	LE
Meal Time Approved	MA
Meal Time Denied	MD
Clock-out Approved	OA
Clock-out Denied	OD
Tardy Arrival Approved	TA
Tardy Arrival Denied	TD

For practice, type 'IA' for Clock-in Approved.

13. Enter the start time in the Time text box

This is the start time for the employee for this date.

For practice, type '08:00'.

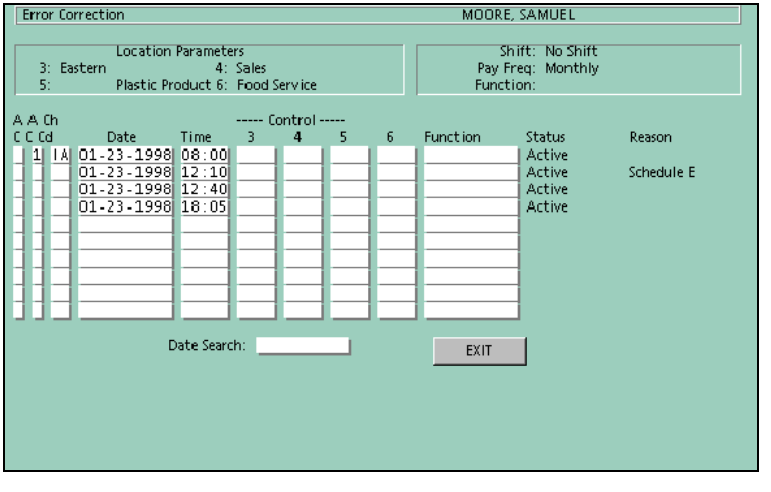


14. Click Save or press Enter

The Clock Start clock transaction (ring) is added.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Clock transaction (ring) error correction ***(on page 262)***

For a discussion about correcting clock transaction (ring) errors.

Revalidating clock transactions (rings)

Once you have corrected the clock transaction (ring) errors, you should revalidate the clock transactions (rings).

Use the Time Entry Validation/Creation form (TMCARD):

Component: Time and Attendance
Process: Daily Processing
Task: Validate Rings

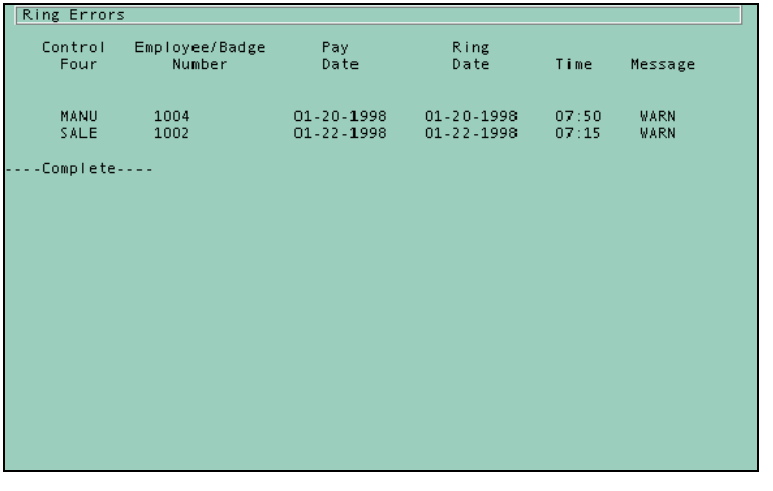
☞ *See* **Validation of clock transactions (rings** *(see "Validation of clock transactions (rings)" on page 260)) for the steps you need to follow to validate the clock transactions (rings).*

Reviewing clock transaction (ring) errors

You must keep reviewing and correcting the clock transaction (ring) errors until none is present. A '----Complete----' message will then be displayed on the RING Errors form (RING03).

☞ *See* **Viewing clock transactions (rings) on the Employee Database** *(on page 271) for the steps you need to follow to review clock transaction (ring) errors.*

If you completed the Guided Practice, the results should look similar to the example that follows:



Review of Questions Answered

1. What is the process that is used to capture employee work time?

2. What are clock transactions (rings) and how are they used?

3. How are clock transactions (rings) validated and why?

4. How are errors corrected and why?

CHAPTER 12

Working with Time Entries

In This Chapter

Introduction

After you have validated and corrected all of the clock transaction (ring) records on the Employee Database, you are ready to create your time entries. This section explains how time entries are created and extracted to an external file where they are fed directly into the payroll process.

☞ *Please refer to the Payroll Time Entries and Adjustments documentation for details about the Cyborg's Payroll Administration.*

Tasks

The following tasks are explained in this section:

- Creating time entries from clock transactions (rings)
- Creating time entries from employee absences
- Creating mass time entries
- Creating time entries from manual entries
- Viewing time entries on the Employee Database
- Creating a time entry extract file (payroll users)
- Creating a time entry extract file (standalone)
- Deleting clock transactions (rings) from the Employee Database
- Deleting time entries from the Employee Database (standalone)

Prerequisites

Before you can begin to create and extract your time entries, you must have already corrected and validated all of the clock transactions (rings) for the pay period.

☞ *Refer to Capturing Employee Work Time for more information on correcting and validating clock transactions (rings).*

Questions answered

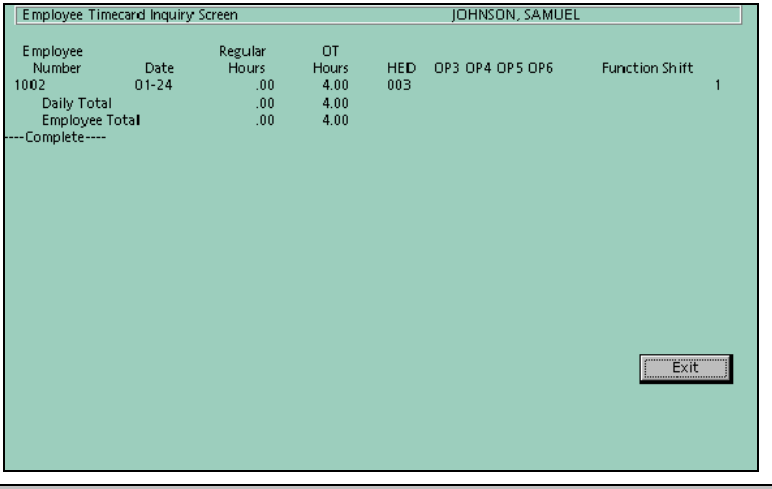
The following questions are answered in this section:

1. Why are time entry extract files created and what are they used for?
2. Why and how are clock transactions (rings) and time entries deleted?

What are time entries?

Time entries are online records containing data, usually hours or earnings identified by type, that are required to pay an employee. Time entries may be entered manually, generated automatically, or both. Time entry records can be viewed using the Employee Time Entry Inquiry form (TCUTIL).

An example of this form is shown below:

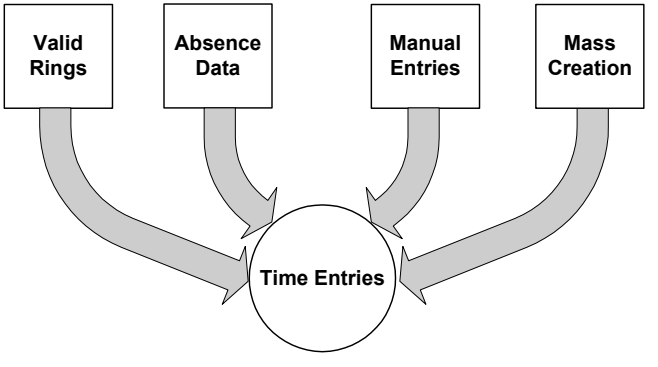


Apply the Concept
Define the term time entry.

Ways to create time entries

After you have validated and corrected all of the clock transaction (ring) records on the Employee Database, you are ready to create your time entries. Time entries provide a record of the hours an employee has worked. This record is fed directly into the payroll process. Time entries can be created using any of these methods:

- From the clock transactions (rings) you validated and corrected
- From absence data
- Manually for missing entries
- Mass time entry creation for selected employees



You can create your time entries for a pay period using any combination of the methods shown in the diagram above. After you have created all of your time entries for a pay period, the time entries are extracted to a file that is used to feed the payroll process—the Cyborg Payroll Administration, or for standalone Time and Attendance users, another payroll system

Time entries that have been created can be viewed using the Employee Time Entry Inquiry form (TCUTIL).

Time entry creation from clock transaction (ring) records

After you have validated and corrected your clock transaction (ring) records for a pay period, time entries are created on the Employee Database. A range of clock transaction (ring) dates for which to create time entries can be selected as can a range of organization values. Time entries can also be created for a specific department, pay frequency, or employee. Creating time entries from clock transactions (rings) is performed on the Time Entry Validation/Creation form (TMCARD).

Time entry creation from absence data

Another way to create time entries is to use the paid absence data that you have entered for your employees on the Absences form (93-SCR). Examples of this type of data are paid

vacation days or paid sick days. Executing the Time Entry Validation/Creation form (TMCARD) to process paid absence data will create time entries using this data.

Manual time entry creation

It is possible that you may need to add, change, or delete some additional time entries from the Employee Database because of situations that arise in employee schedules, and so forth. This is done manually using the Time Entry Edit - Format 1 form (TC1EDT).

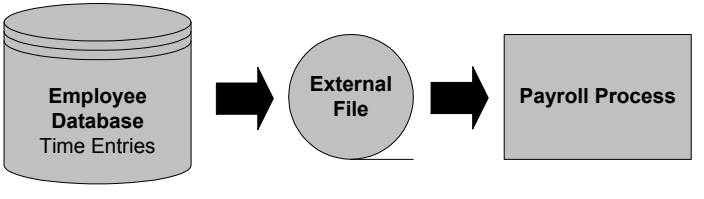
Mass time entry creation

When the work schedule dictates that a specific group of your employees are taking time off and need to be paid for a period of time, such as a holiday, it is helpful to be able to generate time entries automatically for the entire group. This can be accomplished for any group of employees you specify, using pay frequency for an Organization, employee status and Organization Level 3 through Organization Level 6 as selection criteria. You enter the number of hours and the HED that you want written to each employee's time entry and the system creates the time entries for you.

Mass time entries are created using the Time Entry Mass Generation form (TCARDS).

Time entry extract files

After you have created all of your time entries for a pay period, these time entries must be extracted from the Employee Database into an external file.



This time entry extract file will be used to feed the payroll process. This can be accomplished for any group of time entries you specify, using an Organization, a range of employees, dates, HEDs, shift, pay frequency, employee status and Organization Level 3 through Organization Level 6 as selection criteria.

When you run the job to extract your time entries to an external file, a message is displayed on the report that informs you how many time entry records were written to FILE10, the output file.

Users of the Cyborg Payroll Administration extract their time entries using the Pay Extract batch process. Standalone Time and Attendance users use the Time Entry Utility form in batch mode to extract their time entries.

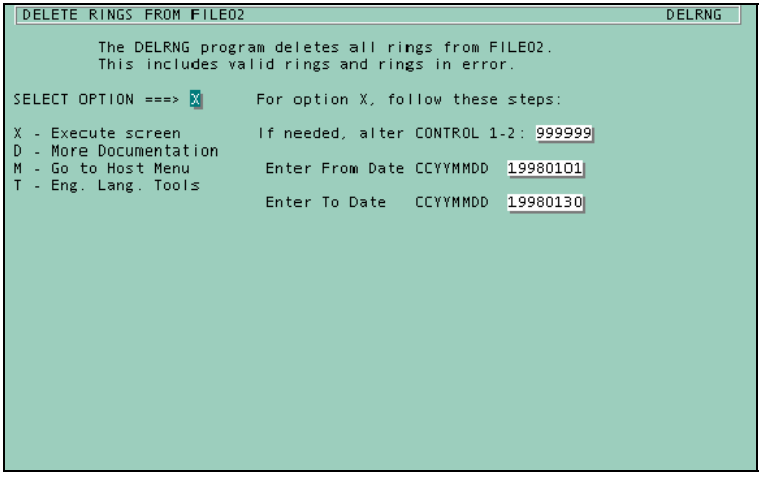
Deletion of clock transactions (rings) and time entries

Once the time entry processing is complete for the pay period and your time entry extract file has been successfully created, we recommend that the clock transactions (rings) and time entries from the pay period be deleted from the Employee Database. This is done because an accumulation of clock transaction (ring) and time entry records can cause space problems on your Employee Database.

Deletion of clock transactions (rings)

The Time Entry Validation/Creation form (TMCARD) is used to delete the clock transaction (ring) records. The entries on this form must match the entries that were used to create the time entry records in order to delete them. Also, there must be no schedule errors in the date range being used for deletion of the clock transactions (rings).

Another method to delete clock transactions (rings) is using the Delete all clock transaction (ring) data program. This program deletes clock transactions (rings) from the Employee Database for Organization using a range of dates. Both valid clock transactions (rings) and clock transactions (rings) that have errors are deleted using DELRNG. Make sure you are using the appropriate Organization value and type the range of dates in the Key and Additional Key text boxes. The example shown below deletes all of the clock transactions (rings) on file for Organization number '999999' and a date range of '01-01-1998' through '01-30-1998'.



Deletion of time entries

Standalone Time and Attendance users use the Employee Time Entry Inquiry form (TCUTIL) to delete the time entry records. A range of dates can be specified.

For Cyborg Payroll Administration users, time entries are deleted during the payroll run process.

Reports related to time entry processing

The following packaged reports have been delivered to assist you in effectively processing your time entries:

- Time Detail/Totals report (TN64PT)
- Overtime report (TN65PT)
- Time Reporting Detail report (TN66PT)
- Labor and Hours Summary report (TN67PT)
- Scheduled vs. Actual Hours report (TN68PT)
- Premium Hours Detail report (TN69PT)
- Earnings Summary report (TN6DPT)

☞ *Refer to* **Report Quick Reference** *(see "Schedule vs. Actual Hours report (TN68PT)" on page 348), for more information about these packaged reports.*

Detailed Directions

This section provides detailed instructions for the tasks discussed in this section.

Tasks

Creating time entries from clock transactions (rings)

This task creates time entries from the validated clock transaction (ring) records.

1. Access the Time Entry Validation/Creation form (TMCARD)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: Create Time Transactions

For practice, access the Time Entry Validation/Creation form (TMCARD).

2. Select a Function

The 'Ring Time Rec Gen' selection is used to create time entries from the clock transactions (rings).

For practice, select 'Ring Time Rec Gen'.

3. Enter a range of dates

The From and To date entries are used to limit the range of dates for which time entries are created. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere). You must enter the From text box. The To text box is optional.

For practice, select a date range of '01-18-1998' through '01-24-1998'.

4. Enter an Organization range (optional)

The From and To Organization entries are used to limit the range of Organizations that have time entries created. Leave both text boxes blank to process all Organizations. To process only one Organization, enter the Organization value in the From text box.

For practice, leave this text box blank.

5. Enter an Employee (optional)

Enter an employee number to create a time entry for a single employee.

For practice, leave this blank.

6. Enter a Department (optional)

Entering an Organization Level 4 value creates time entries for a single department.

For practice, leave this blank.

7. Enter a Frequency (optional)

This entry creates time entries for a single pay frequency.

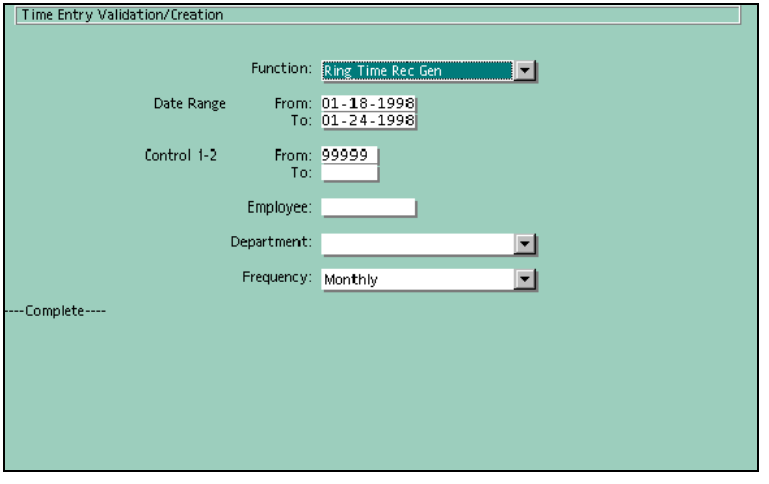
For practice, select 'Monthly'.

8. Click Save or press Enter

The time entry records are created on the Employee Database. A '---Complete--- message is displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Ways to create time entries ***(on page 292)***

For a discussion about creating time entries from clock transactions (rings).

Creating time entries from employee absences

1. Access the Time Entry Validation/Creation form (TMCARD)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: Create Time Transactions

For practice, access the Time Entry Validation/Creation form (TMCARD).

2. Select a Function

The 'Absent Time Rec Gen' selection is used to create time entries from absence data on the Absences form (93-SCR).

For practice, select 'Absent Time Rec Gen'.

3. Enter a range of dates

The From and To date entries are used to limit the range of dates for which time entries are created. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere). You must enter the From text box. The To text box is optional.

For practice, select a date range of '01-18-1998' through '01-24-1998'.

4. Enter a range of Organizations (optional)

The From and To Organization entries are used to limit the range of Organizations that have time entries created. Leave both text boxes blank to process all Organizations. To process only one Organization, enter the Organization value in the From text box.

For practice, leave this text box blank'.

5. Enter an Employee (optional)

Enter an employee number to create a time entry for a single employee.

For practice, leave this blank.

6. Select a Department (optional)

Select an Organization Level 4 value to create time entries for a single department.

For practice, leave this blank.

7. Select a Frequency (optional)

Select a Frequency to create time entries for a single pay frequency.

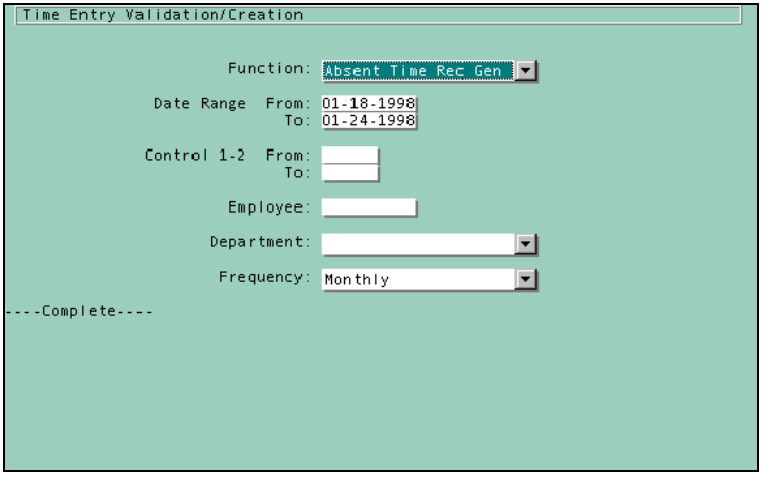
For practice, select 'Monthly'.

8. Click Save or press Enter

The employee absence data is validated against the absence tables and time entry records are created on the Employee Database. A '---Complete--- message is displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Ways to create time entries *(on page 292)*

For a discussion about creating time entries from employee absences.

Creating mass time entries

The Time Entry Mass Generation form provides a quick and easy way to generate mass time entry records to the Employee Database for the employees you specify.

Monday, January 19, 1998 is a holiday for Acme's bi-weekly office workers. This task creates time entries for these workers.

1. Access the Time Entry Mass Generation form (TCARDS)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: Non-Work Time Transactions

For practice, access the Time Entry Mass Generation form (TCARDS).

2. Enter the Record Key

Enter a unique identifier to create the parameter record on the System Control Repository. This parameter record will contain the information that will be written to the time entries and the employee selection criteria.

For practice, enter '1111'.

3. Enter the Query Parameter Key

Enter one of the query alternate key options to produce time entry records. Some of the common valid options are shown in the chart below. You can also enter a user defined alternate key.

Options	Key Option
00	Employee Number
01	Social Security Number
02	Last Name, First

For practice, enter '00'.

4. Enter the From/To

These text boxes indicate the processing range (lowest to highest) of employee numbers, Social Security Numbers, and so on, based on the query alternate key you entered above. For example, if you entered a code of '00' for employee number, enter a range of employee numbers here, such as 1001 through 9999.

For practice, enter '1001' in the From text box and '1005' in the To text box.

5. Enter the Selection Parameters (optional)

You can select the employees for which you will produce time entries through entries to these list boxes. The employees record is checked against the list boxes entered here for a match to the employee's Control Level list boxes, Pay Frequency, and Status. If a match is found on the employee record for all of the entries you make here, a time entry record is created for the employee.

For practice, enter a Pay Frequency of 'Bi-Weekly'.

6. Enter the range of dates

This is the range of dates for which you will produce time entry records. If the To text box is not entered, the From text box entry will be used for both dates in the range.

For practice, enter '01-19-1998' for both the From and To Dates.

7. Enter the Hours

This is the number of hours to be written to each time entry.

For practice, enter '0800'.

8. Enter the HED

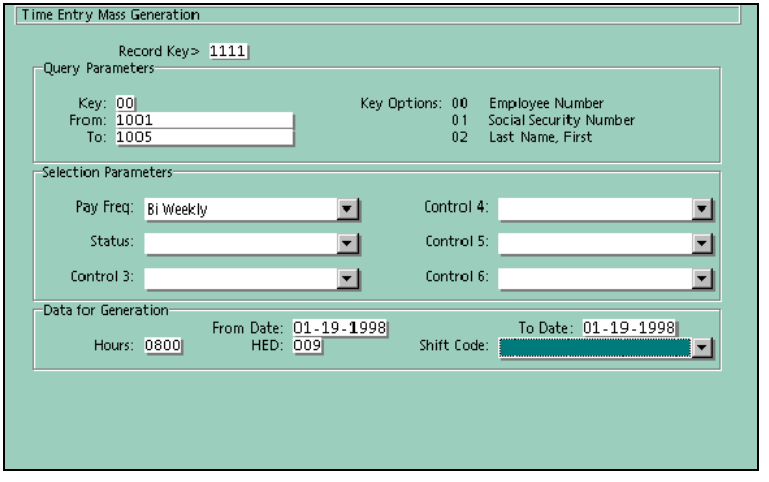
This is the HED to be written to each time entry.

For practice, enter '009'.

9. Enter the Shift Code (optional)

This is the shift identifier to be written to each time entry.

For practice, leave this text box blank.

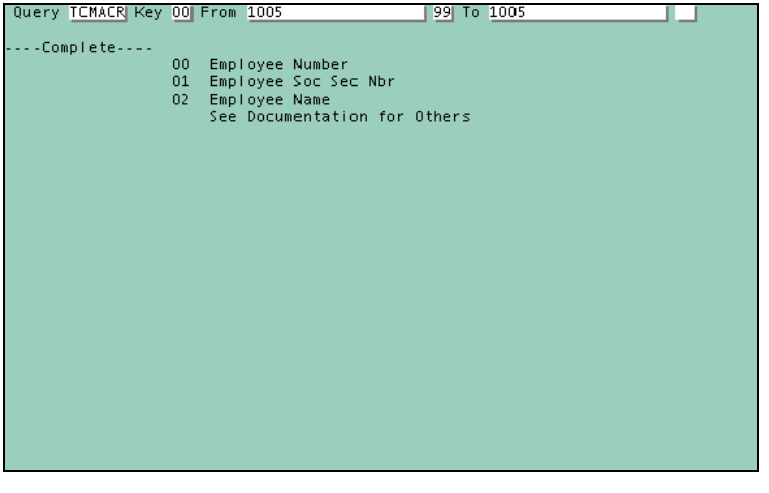


10. Click Save or press Enter

A parameter record is established on the System Control Repository with a Record Key of 1111, and time entries are created for the specified employees. The Query utility is displayed with a '----Complete----' message.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Note: The Employee Time Entry Inquiry form (TCUTIL) can be used to view the time entry records.

See also:

■ Ways to create time entries ***(on page 292)***
For a discussion about creating mass time entries.

Creating time entries from manual entries

In addition to the time entry records that were generated when employees swiped their badges, there may be additional entries that need to be processed. You must process these before an external time entry file can be created.

1. Access the Time Entry Edit - Format 1 form (TC1EDT)

Access this form by making the following selection from the navigator:

Component: Employee Payroll
Process: Time Entries
Task: Edit Format 1 Time Entries

For practice, access the Time Entry Edit - Format 1 form (TC1EDT) for employee number 1002.

2. Enter the Action Code in the first text box

The Action Code text box is the farthest left text box on the form. Valid entries are 'A' (add), 'C' (change), and 'D' (delete). You will be typing over but not deleting the time entry that is displayed on this line.

For practice, type 'A' in the Action code.

3. Enter the Function Code text box

This is the next text box and it is labeled FC. Valid options include the following:

Activity	Code
Regular Pay	12
Dock regular pay	16

For practice, enter'12'.

4. Enter Regular Hours and Rate/Amount (optional)

Enter the number of regular hours and the rate or amount to be paid. Time and Attendance standalone users should enter only the Regular Hours text box.

For practice, leave these text boxes blank.

5. Enter Overtime Hours and Rate/Amount (optional)

Enter the number of overtime hours and rate to be paid or the amount to be paid. Time and Attendance standalone users should enter only the Overtime Hours text box.

For practice, enter '400' (4 hours) in the Overtime Hours text box.

6. Enter the HED

Enter the HED for the Regular or Overtime hours entered.

For practice, enter '003'.

7. Enter the time entry Date

Enter the time entry date in the MM-DD format.

For practice, enter '01-24'.

8. Enter the Shift Code (optional)

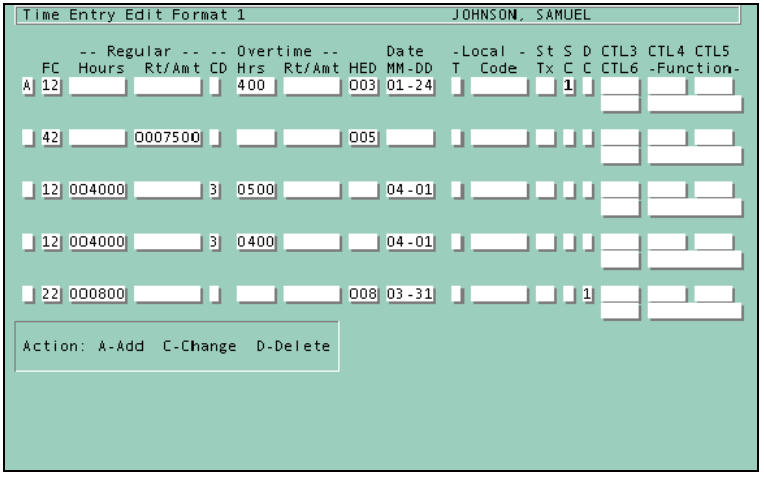
Enter the Shift Code to represent the shift premium.

For practice, enter '1'.

9. Enter the Organization Level text boxes and Function (optional)

Organization Level 3 through 6 and Function can be entered to override the employee-level entries.

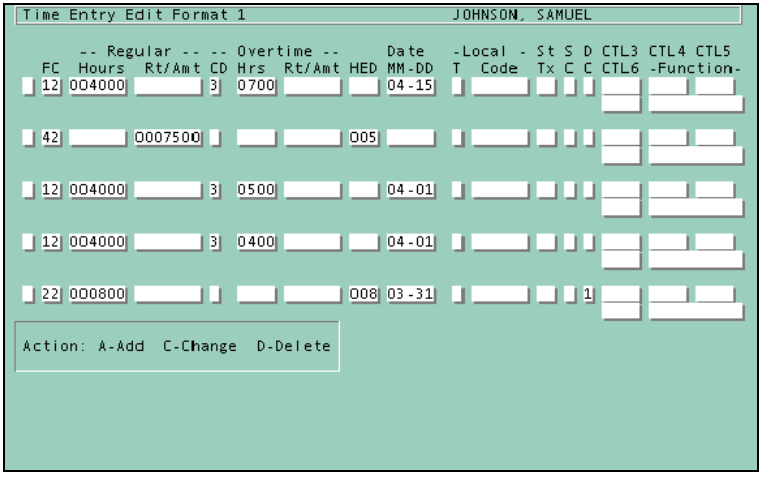
For practice, leave these text boxes blank.



The time entry record is added to the Employee Database.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



See also:

- Ways to create time entries *(on page 292)*

For a discussion about creating time entries from manual entries.

Viewing time entries on the Employee Database

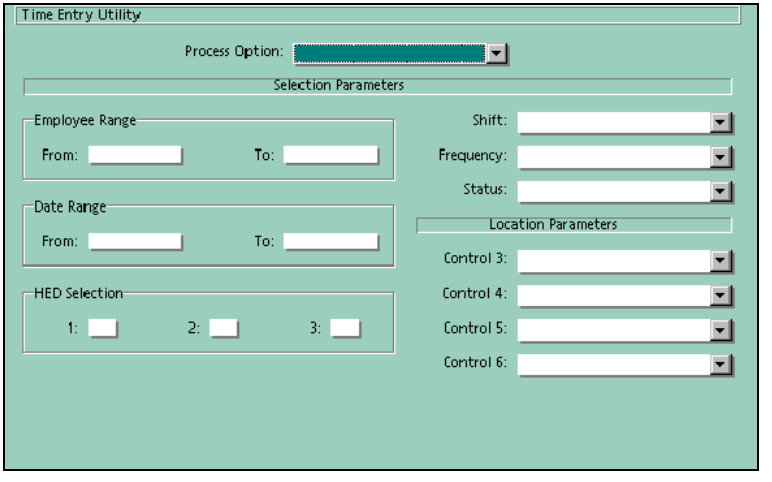
Before writing time entries to an external file, you can display the time entry records that were created on the Employee Database.

1. Access the Employee Time Entry Inquiry form (TCUTIL)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: View Time Transactions

For practice, access the Employee Time Entry Inquiry form (TCUTIL).



2. Select a Process Option

The 'List' selection displays the time entries on the Employee Database.

For practice, select 'List'.

3. Enter an Employee Range (optional)

The From and To employee number entries are used to limit the range of employees for whom time entry records will be displayed.

For practice, leave these text boxes blank.

4. Enter a range of dates (optional)

The From and To date entries are used to limit the range of time entries that will be displayed. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, select a date range of '01-18-1998' through '01-24-1998'.

5. Enter HED Selections (optional)

Use these text boxes to specify HED Numbers as time entry record selection criteria. Only time entry records containing the HED Number(s) entered here are processed.

For practice, leave these text boxes blank.

6. Select a Shift (optional)

Select a Shift if you want to include this as part of the selection criteria.

For practice, leave this blank.

7. Select a Frequency (optional)

This entry creates time entries for a single pay frequency.

For practice, leave this blank.

8. Select a Status (optional)

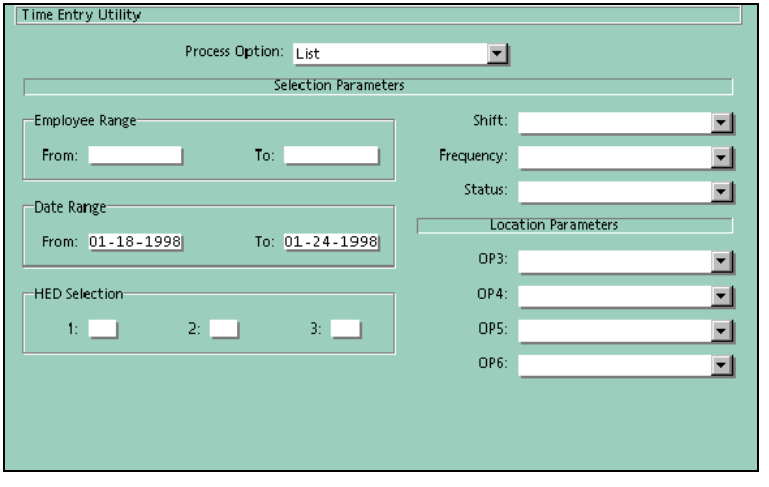
This entry creates time entries for a single employment status, for example, 'Full Time'.

For practice, leave this blank.

9. Select Location Parameters

Select Organization Level 3 through Organization Level 6 values to specify these as selection criteria.

For practice, leave these list boxes blank.

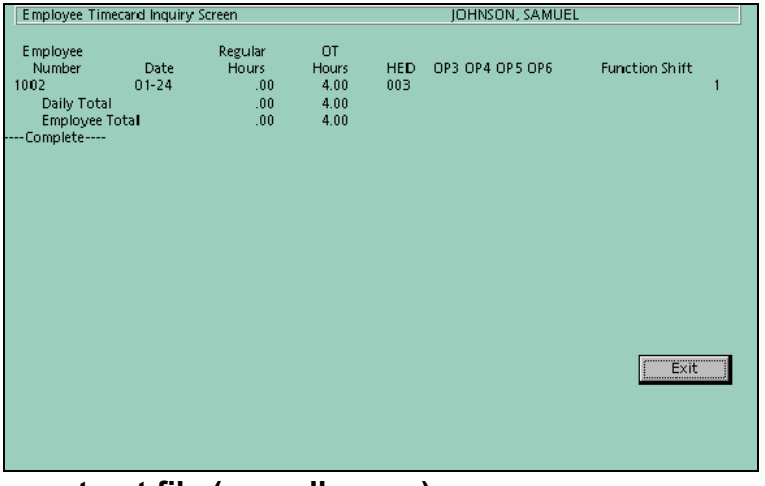


10. Click Save or press Enter

The time entry records are displayed on the form in employee number order starting with the most recent date. Keep clicking on the OK button or pressing Enter to view time entry records for the other employees. A '---Complete--- message is displayed when all of the time entry records have been displayed.

For practice, click Save or press Enter.

If you completed the Guided Practice, the results should look similar to the example that follows:



Creating a time entry extract file (payroll users)

Time and Attendance users who are also using the Cyborg Payroll Administration should execute Pay Extract program in batch mode to create a time entry extract file for direct input to the payroll process. You can extract all companies or only those companies and frequencies requiring payment.

You will receive time entries and adjustments for the test Organization in FILE10. The time entries and adjustments will be extracted from the online Employee Database (FILE02) and placed in FILE12 to create the new P20IN master file.

Use the file assignments and control record example shown below to execute the pay extract run.

File Assignments

Input Files:	FILE01 System Control Repository FILE02 Employee Database FILE04 Run Parameter FILE11 Batch Master File from last JPAYMRG
Output Files:	FILE03 Audit/Message File FILE10 Time entries and Adjustments FILE12 New P20IN
Execute:	CBSVB

Example of the Control Record File (FILE04):

```
....+....1....+....2....+....3....+....4....+....5.//.0
P PAYMRGJ09500  999999PAYXTR  ALL
```

Creating a time entry extract file (standalone)

Standalone Time and Attendance users should use the Employee Time Entry Inquiry form (TCUTIL) in batch mode to create a time entry extract file for direct input to your payroll process.

File Assignments

Input Files:	FILE01 System Control Repository FILE02 Employee Database FILE04 Run Parameter
Output Files:	FILE03 Audit/Message File FILE10 Time entries and adjustments
Execute:	CBSVB

Example of the Control Record File (FILE04):

```
....+....1....+....2....+....3....+....4....+....5....+.//.0   75
P CONTRLT00010  999999TCUTIL                          E       *
P CONTRLT00020       19980118  19980124
```

See also:

- Time entry extract files *(on page 293)*

For a discussion about creating time entry extract files.

Deleting clock transactions (rings) from the Employee Database

Once the time entry processing is complete for the pay period, the clock transaction (ring) records should be deleted from the Employee Database using the Time Entry Validation/Creation form (TMCARD). The entries on this form must match the entries that were made when creating the time entry records and there must be no schedule errors in the date range being used.

Note: To detect any schedule errors, the '999999WWX' record can be viewed. If position 55 of this record contains an 'S', schedule errors are present and must be corrected before continuing.

1. Access the Time Entry Validation/Creation form (TMCARD)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Daily Processing
Task: Validate Rings

For practice, access the Time Entry Validation/Creation form (TMCARD).

2. Select a Function

The 'Delete Rings' selection is used to delete the clock transaction (ring) records from the Employee Database.

For practice, select 'Delete Rings'.

3. Enter a Date Range

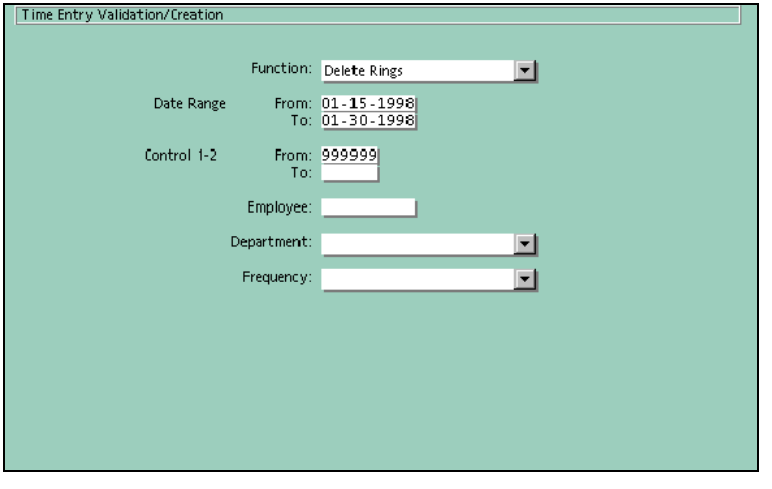
The From and To date entries are used to limit the range of dates for which clock transactions (rings) are deleted. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere). You must enter the From text box. The To text box is optional.

For practice, select a date range of '01-15-1998' through '01-30-1998'.

4. Enter a Organization range (optional)

The From and To Organization entries are used to limit the range of Organizations for which clock transactions (rings) are deleted. Leave both text boxes blank to process all Organizations. To process only one Organization, enter the Organization value in the From text box.

For practice, enter Organization number '999999'.



5. Click Save or press Enter

The clock transactions (rings) are deleted from the Employee Database and a '---Complete---' message is displayed.

For practice, click Save or press Enter.

See also:

- Deletion of clock transactions (rings) and time entries ***(on page 294)***

For a discussion about deleting clock transactions (rings).

Deleting time entries from the Employee Database (standalone)

Once the time entry processing is complete for the pay period, standalone users should delete the time entries from the Employee Database. This is done using the Employee Time Entry Inquiry form (TCUTIL).

1. Access the Employee Time Entry Inquiry form (TCUTIL)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Delete Time Transactions

For practice, access the Employee Time Entry Inquiry form (TCUTIL).

2. Select a Process Option

The 'Delete' selection deletes the time entries from the Employee Database.

For practice, select 'Delete'.

3. Enter an Employee Range (optional)

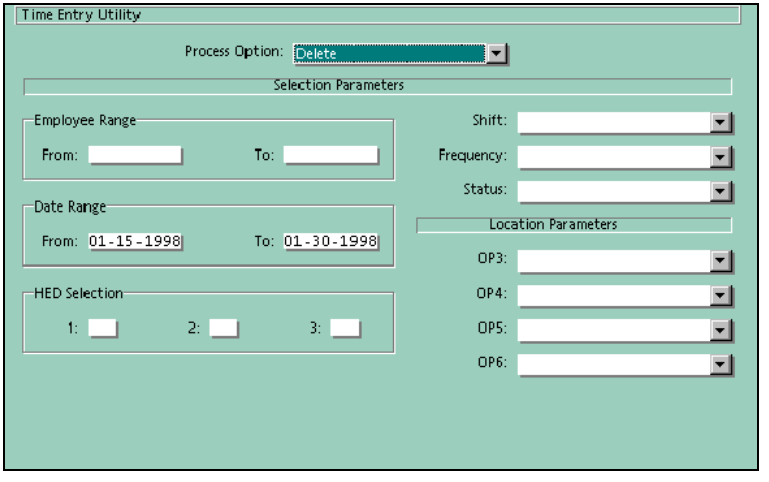
The From and To employee number entries are used to limit the range of employees for whom time entry records will be deleted.

For practice, leave these text boxes blank.

4. Enter a Date Range (optional)

The From and To date entries are used to limit the range of time entries that will be deleted. Dates are entered in MMDDYY format (US and Canada, excluding Quebec) or DDMMYY format (elsewhere).

For practice, select a date range of '01-15-1998' through '01-30-1998'.



5. Click Save or press Enter

A prompt is displayed requesting you to confirm purging the time entry records.

For practice, click Save or press Enter.

6. Respond to the Perform Purges message

The time entries are deleted from the Employee Database and a '---Complete---' message is displayed.

For practice, type 'Y' and click Save or press Enter.

See also:

- Deletion of clock transactions (rings) and time entries ***(on page 294)***

For a discussion about deleting time entries.

Review of Questions Answered

1. Why are time entry extract files created and what are they used for?

2. Why and how are clock transactions (rings) and time entries deleted?

PART 5

Appendices

In This Section

APPENDIX A

Report Quick Reference

In This Appendix

Introduction

This section provides a quick reference guide to Time and Attendance Administration reports covered in this manual.

Clock transaction (ring) Reports

Active/Inactive Rings report (6AIRP)

The Active/Inactive Ring report (6AIRPT) provides a clock transaction (ring) listing after performing the Upload RINGS process. It also indicates whether a clock transaction (ring) is active or inactive. This report provides the management staff with an audit of overrides to the original clock transactions (rings).

Business Tasks

This report is used to complete the following business task:

- Reviewing adjustments that have been made to the original clock transactions (rings).

Report field details

Department

Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Badge Number
Employee's Badge Number

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Sub-Schedule Number

Ring Date
The date on the clock transaction (ring)

Ring Time
The time on the clock transaction (ring)

Ctrl Three
Organization level three assigned to the employee

Ctrl Four
Organization level Four assigned to the employee

Ctrl Five
Organization level Five assigned to the employee

Ctrl Six
Organization level Six assigned to the employee

Function
Function assigned to the employee

Report sort order

As delivered, the sort order for this report is Organization, Organization level 4, Employee Number, Schedule-Table Nbr, Sub-Schedule-Nbr, Ring-Date, Ring-Time.

Parameter options and setup

Start

Enter the start date in MM-DD-CCYY or CCYYMMDD format

End

Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4

Select an employee Organization level 4 to narrow your selection.

Shift

Select an employee shift to narrow your selection

Pay Frequency

Select an employee Pay Frequency to narrow your selection

Option

Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule

Enter up to three employee Schedules and Sub-Schedules to narrow your selection

See also:

- Active/Inactive Rings report (6AIRP) - Example ***(on page 323)***

For an example of this report.

■ **Capturing Employee Work Time** ***(on page 253)***

For information on viewing clock transactions (rings) on the Employee Database.

Active/Inactive Rings report (6AIRP) - Example

```
CORPORATION  99   ACME MANUFACTURING          ACTIVE/INACTIVE RINGS               REPT                            PAGE      1
DIVISION     9999 PRODUCTION CTL 1-2          01-01-1998 THRU 01-31-1998          6AIR               TIME      DATE 02-10-1998

CONTROL-4:  ALL                    INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL            PAY-FREQUENCY: INCLUDE ALL

                                   EMPLOYEE    BADGE   SCHEDULE   SUB-SCHED   RING    RING  CTRL  CTRL CTRL CTRL            ACTIVE
DEPT EMPLOYEE NAME                 NUMBER      NUMBER   NUMBER     NUMBER     DATE    TIME  THREE FOUR FIVE SIX  FUNCTION  INACTIVE

ADM  JOHNSEN, RICH DANIEL          1112        1112     900         00     01-19-1998 07:48
                                                                           01-19-1998 19:00                                  A
                                                                           01-19-1998  19:29                                 A
                                                                           01-20-1998  01:00                                 A
                                                                           01-20-1998  16:31                                 A
                                                                           01-20-1998  19:30                                 A
                                                                           01-21-1998  01:00                                 A
                                                                           01-21-1998  16:30                                 A
                                                                           01-21-1998  19:00                                 A
                                                                           01-21-1998  19:39                                 A
                                                                           01-22-1998  01:39                                 A
                                                                           01-22-1998  16:29                                 A
                                                                           01-22-1998  19:00                                 A
                                                                           01-22-1998  19:15                                 A
                                                                           01-23-1998  00:30                                 A
```

Original RINGS (60-RPT)

The Original Rings report (60-RPT) provides a listing of the clock transaction (ring) data input into the Employee Database (FILE02)

Business Tasks

This report is used to complete the following business task:

- List clock transaction (ring) input to the Employee Database (FILE02), prior to any time entry processing or validation.

Report field details

Department
Employee's Department (Organization level 4)

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Badge Number
Employee's Badge Number

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Sub-Schedule Number

RING Date
The date on the clock transaction (ring)

RING Time
The time on the clock transaction (ring)

Ctrl Three
Organization level Three assigned to the employee

Ctrl Four
Organization level Four assigned to the employee

Ctrl Five
Organization level Five assigned to the employee

Ctrl Six
Organization level Six assigned to the employee

Function
Function assigned to the employee

Report sort order

As delivered, the sort order for this report is Organization, Organization level 4, Employee Number, Schedule-Table Nbr, Sub-Schedule-Nbr, Ring-Date, Ring-Time.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employees Organization level 4 to narrow your selection

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee Pay Frequency to narrow your selection

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three employee Schedules and Sub-Schedules to narrow your selection

See also:

- Original RINGS (60-RPT) - Example ***(on page 327)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on completing the parameters for this report.

- **Original Rings report (60SRPT** ***(see "Original Rings report (60SRPT) - Example" on page 329)*****)**

For information on the Original Rings (60SRPT) report.

- **Active/Inactive Rings report (6AIRPT *(see "Active/Inactive Rings report (6AIRP)" on page 320)*)**

For information on the Active/Inactive Rings 80 char - (6AIRPT) report.

Original RINGS (60-RPT) - Example

```
CORPORATION  99   ACME MANUFACTURING         ORIGINAL RINGS                  REPT                                  PAGE     2
DIVISION     9999 PRODUCTION CTL 1-2        01-01-1998 THRU 01-31-1998      60-R                   TIME         DATE 02-10-1998

CONTROL-4:  ALL                  INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL          PAY-FREQUENCY: INCLUDE ALL

                                 EMPLOYEE    BADGE     SCHEDULE  SUB-SCHED   RING      RING  CTRL   CTRL  CTRL  CTRL
DEPT EMPLOYEE NAME                NUMBER     NUMBER    NUMBER    NUMBER      DATE      TIME  THREE  FOUR  FIVE  SIX  FUNCTION

ADM  JOHNSEN, RICH DANIEL        1112            1112   900        00     01-19-1998   07:48
                                                                          01-19-1998   11:16
                                                                          01-19-1998   11:42
                                                                          01-19-1998   16:58
                                                                          01-21-1998   08:02
                                                                          01-21-1998   12:40
                                                                          01-21-1998   13:02
                                                                          01-21-1998   17:15
                                                                          01-22-1998   07:15
                                                                          01-22-1998   12:42
                                                                          01-22-1998   13:05
                                                                          01-22-1998   16:38
                                                                          01-23-1998   12:10
                                                                          01-23-1998   13:01
                                                                          01-23-1998   18:05

ADM  WELKER, GEORGE W            1114            1114   900        00     01-19-1998   08:00
                                                                          01-19-1998   12:00
                                                                          01-19-1998   12:30
                                                                          01-19-1998   16:30
                                                                          01-20-1998   07:53
                                                                          01-20-1998   18:00
                                                                          01-21-1998   08:05
                                                                          01-21-1998   11:30
                                                                          01-21-1998   12:00
                                                                          01-21-1998   16:30
                                                                          01-22-1998   09:01
                                                                          01-22-1998   12:00
                                                                          01-22-1998   12:30
                                                                          01-22-1998   16:30
```

Original Rings report (60SRPT)

The Original Ring report (60SRPT) provides an 80 characters listing of the clock transaction (ring) data input to the Employee Database (FILE02).

Unlike the 60-RPT, the listing does not display labor overrides (Organization level 3 through 6, and Function)

Business Tasks

This report is used to complete the following business tasks:

- Listing clock transaction (ring) data input to the Employee Database (FILE02), prior to any time entry processing or validation.

Report field details

Department
Employee's Department (Organization level 4)

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Badge Number
Employee's Badge Number

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character numeric Sub-Schedule Number

Ring Date
The clock transaction (ring) date

Ring Time
The clock transaction (ring) time

Report sort order

As delivered, the sort order for this report is Organization, Organization level 4, Employee Number, Schedule-Table Nbr, Sub-Schedule-Nbr, Ring-Date, and Ring-TIME.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three Schedules and Sub-Schedules you want to narrow your selection

See also:

- Original Rings report (60SRPT) - Example ***(on page 329)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on completing the parameters for this report.

- **Original Rings report (60RPT** ***(see "Original Rings report (60SRPT)" on page 328)*****)**

For information on the Original Rings (60-RPT) report.

Original Rings report (60SRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING            ORIGINAL   REPT     PAGE     2
DIVISION     9999 PRODUCTION CTL 1-2             RINGS     60SR  TE 02-10-1998

DATE: 01-01-1998 THRU 01-31-1998
CONTROL-4: ALL    INCLUDE ALL SCHEDULES

                            EMPLOYEE   BADGE     SCHEDULE     RING      RING
DEPT  EMPLOYEE NAME          NUMBER    NUMBER    NBR  SUB     DATE      TIME
ADM   JOHNSEN, RICH DANIEL   1112          1112  900   00  01-19-1998   07:48
                                                           01-19-1998   11:16
                                                           01-19-1998   11:42
                                                           01-19-1998   16:58
                                                           01-21-1998   08:02
                                                           01-21-1998   12:40
                                                           01-21-1998   13:02
                                                           01-21-1998   17:15
                                                           01-22-1998   07:15
                                                           01-22-1998   12:42
                                                           01-22-1998   13:05
                                                           01-22-1998   16:38
                                                           01-23-1998   12:10
                                                           01-23-1998   13:01
                                                           01-23-1998   18:05

ADM   WELKER, GEORGE W       1114          1114  900   00  01-19-1998   08:00
                                                           01-19-1998   12:00
                                                           01-19-1998   12:30
                                                           01-19-1998   16:30
                                                           01-20-1998   07:53
                                                           01-20-1998   18:00
                                                           01-21-1998   08:05
                                                           01-21-1998   11:30
                                                           01-21-1998   12:00
                                                           01-21-1998   16:30
                                                           01-22-1998   09:01
                                                           01-22-1998   12:00
                                                           01-22-1998   12:30
                                                           01-22-1998   16:30
```

Rings/Errors/Hours report (62HRPT)

The Rings/Errors/Hours report (62HRPT) is a listing of clock transaction (ring) records with earned hours for a specified date or range of dates. Prior to running this report you must use the Time Entry Validation/Creation (TMCARD) program, selecting either of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

If a clock transaction (ring) is in an error state and no time entry has been created, hours appear on the report as zero.

Time entries that have been created using one of the following forms do not have corresponding clock transaction (ring) records.

- Time Entry Edit - Partial Format 1 (TCFEDT)
- Time Entry Edit Format 1 (TC1EDT)
- Absences form (93-SCR)

The time entries are printed on the report with spaces in the RING-TIME entry and a description under the RING ORIGIN column indicating their origin.

Badge, Schedule and Sub-Schedule Number data is printed. Hours earned are listed with corresponding HED and earnings descriptions. HED totals and employee total hours are indicated as summaries for each employee.

Business Tasks

This report is used to complete the following business task:

- Providing management with an audit of overrides to the original clock transactions (rings).

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Badge Number
Employee's Badge Number

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Sub-Schedule Number

Ring Date
The date on the clock transaction (ring)

Ring Time
The time on the clock transaction (ring)

Reason
The type of clock transaction (ring) exception if applicable

HED Nbr
HED number on the time entry

HED Name
HED Description

Hours
Number of hours employee has earned for a particular HED

Report sort order

As delivered, the sort order for this report is ORGANIZATION LEVEL 4 and EMPLOYEE NUMBER.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Note: Do not make any entries on this form to report on all clock transactions (rings), hours, and errors.

See also:

- Rings/Errors/Hours report - Example (62HRPT ***(see "Rings/Errors/Hours report (62HRPT) - Example" on page 333))***

For information on this report.

- **Capturing Employee Work Time *(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries *(on page 289)***

For information on creating Rings.

Rings/Errors/Hours report (62HRPT) - Example

```
CORPORATION  99   ACME MANUFACTURING            RINGS/ERRORS/HOURS             REPT                                  PAGE     1
DIVISION   9999 PRODUCTION CTL 1-2           01-19-1998 THRU 01-31-1998       62HR                    TIME 08:29 DATE 02-12-1998

                         EMPLOYEE    BADGE    SCHEDULE    TIMECARD         RING    RING  ERROR/     HED
DEPT EMPLOYEE NAME        NUMBER     NUMBER    NUMBER      ORIGIN          DATE    TIME  WARNING    NBR HED NAME          HOURS

     YARDLEY, EARL      1119            1119  800 02                 01-19-1998 16:29 WARNING    001 REGULAR PAY        7.50
                                                                     01-19-1998 19:00 WARNING    003 OVERTIME PAY        .60

                                              800 02                 01-20-1998 16:31 WARNING    001 REGULAR PAY        7.50
                                                                     01-20-1998 19:30 WARNING    003 OVERTIME PAY      11.00
                                                                     01-21-1998 01:00 WARNING
                                                                     01-21-1998 16:30 WARNING

                                              800 02                 01-21-1998 19:00 WARNING    001 REGULAR PAY        7.50
                                                                     01-21-1998 19:39 WARNING    003 OVERTIME PAY       7.90
                                                                     01-22-1998 01:39 WARNING
                                                                     01-22-1998 16:29 WARNING

                                              800 02                 01-22-1998 19:00 WARNING    001 REGULAR PAY         .20
                                                                     01-22-1998 19:15 WARNING
                                                                     01-23-1998 00:30 WARNING

                                                                        ** HED TOTAL   001 REGULAR PAY       22.70
                                                                                       003 OVERTIME PAY      19.50

                                                                        ** TOTAL FOR EMPLOYEE 1119           42.20

**TOTAL FOR CONTROL-4:                                                                                       42.20
```

Time Reports

Docking/Credit report (63-RPT)

The Docking/Credit report (63-RPT) provides a listing of the amount of time docked or credited to an employee based on the Rounding, Grace and Event-Start-Time parameters set up on the Policy Activities table (PT2SCR) and the Schedule Activities table (ST2SCR).

The report compares the employee's scheduled time against the actual clock transaction (ring) time. Prior to running this report you must use the Time Entry Validation/Creation form (TMCARD), selecting either of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Business Tasks

This report is used to complete the following business tasks:

- Providing a comparison of scheduled time and actual time of clock transaction (ring) for each employee.
- Evaluating the cost of paying employees, based on actual time versus rounded time.
- Assisting management in determining effective use of rounding time and employee abuse of grace periods.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Badge Number
Employee's Badge Number

Schedule Number
Employee's 3-character alphanumeric Schedule Nbr

Sub-Sched Number
Employee's two-character alphanumeric Sub-Schedule Number

Date of Event
Date the activity took place

Name of Event
Name of activity, Clock Start and so forth

Time Scheduled
The time the activity should have taken place

Actual Time
The actual clock transaction (ring)

Amount of Dock/Credit
Value that will be docked from, or credited to the employee

Report sort order

As delivered, the sort order for this report is Organization, Organization level 4, Employee Number, Ring-Date and Ring-Code.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee Pay Frequency to narrow your selection

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three employee Schedules and Sub-Schedules to narrow your selection

See also:

- Docking/Credit report (63-RPT) - Example ***(on page 339)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

Docking/Credit report (63-RPT) - Example

```
CORPORATION  99   ACME MANUFACTURING        DOCKING/CREDIT REPORT       REPT                                  PAGE     1
DIVISION   9999 PRODUCTION CTL 1-2       01-19-1998 THRU 01-25-1998    63-R                       TIME 08:48 DATE 02-11-1998

CONTROL-4:  ALL                   INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL           PAY-FREQUENCY: INCLUDE ALL

                                    EMPLOYEE  SCHEDULE SUB-SCHED    DATE                      TIME      ACTUAL    AMOUNT OF
DEPT   EMPLOYEE NAME                NUMBER    NUMBER   NUMBER     OF EVENT   NAME OF EVENT SCHEDULED    TIME    DOCK/CREDIT

       YARDLEY, EARL                1119       800       02      01-19-1998  Clock Start     16:00     16:29      -00:29
                                                                 01-19-1998  Meal Start      10:30     19:00      -08:30
                                                                 01-19-1998  Meal End        11:00     19:29       08:29
                                                                 01-20-1998  Clock End       24:00     01:00       01:00

                                                                                                      DAILY TOTAL:  00:30

                                                                 01-20-1998  Clock Start     16:00     16:31      -00:31
                                                                 01-20-1998  Meal Start      10:30     19:30      -09:00
                                                                 01-21-1998  Meal End        11:00     01:00      -10:00
                                                                 01-21-1998  Clock End       24:00     16:30      -07:30

                                                                                                      DAILY TOTAL: -27:01

                                                                 01-21-1998  Clock Start     16:00     19:00      -03:00
                                                                 01-21-1998  Meal Start      10:30     19:39      -09:09
                                                                 01-22-1998  Meal End        11:00     01:39      -09:21
                                                                 01-22-1998  Clock End       24:00     16:29      -07:31

                                                                                                      DAILY TOTAL: -29:01

                                                                 01-22-1998  Clock Start     16:00     19:00      -03:00
                                                                 01-22-1998  Meal Start      10:30     19:15      -08:45
                                                                 01-23-1998  Meal End        11:00     00:30      -10:30

                                                                                                      DAILY TOTAL: -22:15
                                                                                                  EMPLOYEE TOTAL: -77:47
```

Earnings Summary report (TN6DPT)

The Earnings Summary report (TN6DPT) displays the HED description for each change in regular and overtime work.

Prior to executing this report, you must import clock transaction to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) using the selecting either of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business tasks:

- Providing a pay period summary of the hours worked by each employee.
- Providing totals on departments as well as employees, so it may be used as a managerial tool to help evaluate department earnings, costs, and so forth.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

HED Nbr
HED number that has been earned by employee

HED Name
Name of HED that employee has earned

Regular Hours
Displays the number of Regular hours an employee has earned for particular HED

Overtime Hours
Displays the number of Overtime hours an employee has earned for particular HED

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER and 12-HED-Nbr.

Report totals

Totals are reported on Employee-Number, Organization level 4, Organization, and grand total.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 value. This is optional

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

See also:

- Earnings Summary report (TN6DPT) - Example ***(on page 341)***
  For information on this report.
- **Capturing Employee Work Time** ***(on page 253)***
  For information on applying Rings to the Employee Database.
- **Working with Time Entries** ***(on page 289)***
  For information on creating Rings.

Earnings Summary report (TN6DPT) - Example

```
CORPORATION  99   ACME MANUFACTURING              EARNINGS SUMMARY               REPT                                  PAGE     1
DIVISION   9999 PRODUCTION CTL 1-2            01-19-1998 THRU 01-23-1998        TN6D                    TIME 08:42 DATE 02-12-1998

CONTROL-4:  ALL
SHIFT-CODE: INCLUDE ALL            PAY-FREQUENCY: INCLUDE ALL

                                      EMPLOYEE    HED                    REGULAR   OVERTIME
DEPT   EMPLOYEE NAME                   NUMBER     NBR   HED NAME          HOURS     HOURS

       YARDLEY, EARL                  1119        001   REGULAR PAY        22.70      .00

                                                  003   OVERTIME PAY         .00    19.50

**TOTALS FOR CONTROL-4:                                                     22.70    19.50
CORPORATION  99   ACME MANUFACTURING              EARNINGS SUMMARY               REPT                                  PAGE     2
DIVISION   9999 PRODUCTION CTL 1-2            01-19-1998 THRU 01-23-1998        TN6D                    TIME 08:42 DATE 02-12-1998

CONTROL-4:  ALL
SHIFT-CODE: INCLUDE ALL            PAY-FREQUENCY: INCLUDE ALL

                                      EMPLOYEE    HED                    REGULAR   OVERTIME
DEPT   EMPLOYEE NAME                   NUMBER     NBR   HED NAME          HOURS     HOURS

ADM    JOHNSEN, RICH DANIEL           1112        001   REGULAR PAY        22.50      .00

                                                  003   OVERTIME PAY         .00     3.20

ADM    WELKER, GEORGE W               1114        001   REGULAR PAY        37.00      .00

                                                  003   OVERTIME PAY         .00     4.10

**TOTALS FOR CONTROL-4: ADM                                                 59.50     7.30
```

Overtime report (TN65PT)

The Overtime report (TN65PT) provides a detailed listing of earnings in an overtime category.

Prior to executing this report you must apply rings to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) selecting either of the following two options in the Function options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business tasks:

- Identifying overtime earnings for each employee, giving totals by employee and department for a specified period of time.
- Assisting managers to monitor approaching overtime and abuse of overtime. It may also be helpful for budgeting purposes.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Period Date
The date on which the overtime HED was earned

HED Nbr
HED number of the overtime earning

HED Name
HED description

Overtime Hours
Number of overtime hours the employee has earned

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, SAVE-DATE and 12-HED-NBR.

Report totals

Totals are reported on Employee-Number, Organization level 4, Organization, and grand total.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection

Organization level 5
Select an employee Organization level 5 to narrow your selection

Organization level 6
Select an employee Organization level 6 to narrow your selection

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee Pay Frequency to narrow your selection

See also:

- Overtime report (TN65PT) - Example ***(on page 343)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

Overtime report (TN65PT) - Example

```
CORPORATION  99   ACME MANUFACTURING               OVERTIME REPORT              REPT                                PAGE     1
DIVISION   9999 PRODUCTION CTL 1-2             01-19-1998 THRU 01-23-1998       TN65                  TIME 08:42 DATE 02-12-1998

CONTROL-4: ALL
SHIFT-CODE:INCLUDE ALL             PAY-FREQUENCY: INCLUDE ALL

                                  EMPLOYEE        PERIOD    HED                   OVERTIME
DEPT   EMPLOYEE NAME              NUMBER           DATE     NBR HED NAME           HOURS

       YARDLEY, EARL               1119         01-21-1998  003 OVERTIME PAY       7.90

                                                                **DAILY TOTAL:   7.90

                                               01-20-1998  003 OVERTIME PAY      11.00

                                                                **DAILY TOTAL:  11.00

                                               01-19-1998  003 OVERTIME PAY        .60

                                                                **DAILY TOTAL:    .60

                                                              **EMPLOYEE TOTAL:  19.50

**TOTAL FOR CONTROL-4:                                                          19.50
```

Premium Hours Detail report (TN69PT)

The Premium Hours Detail report (TN69PT) displays the premium hours associated with the labor activities as defined by the Organization levels 3-6 and FUNCTION option list.

Prior to executing this report, you must apply rings to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) to select either of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business task:

- Analyzing labor and hours on time entries which are about to be processed.
- Providing a permanent record of labor and hours for each employee.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Regular Hours
Displays the number of Regular hours an employee has earned for particular HED

Overtime Hours
Displays the number of Overtime hours an employee has earned for particular HED

Ctrl Three
Organization level Three assigned to this employee

Ctrl Four
Organization level Four assigned to this employee

Ctrl Five
Organization level Five assigned to this employee

Ctrl Six
Organization level Six assigned to this employee

Function
Function assigned to this employee

HED Nbr
HED number that has been earned by employee

HED Name
Name of HED that employee has earned

Period Date
Displays the date on which either the Regular and/or Overtime HED was earned

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, SAVE-DATE and SORT-KEY-SEP-3.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 value. This is optional

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

See also:

- Premium Hours Detail report (TN69PT) - Example ***(on page 347)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

Premium Hours Detail report (TN69PT) - Example

```
CORPORATION  99   ACME MANUFACTURING             LABOR AND HOURS DETAIL          REPT                                PAGE     1
DIVISION     9999 MIDWESTERN DIVISION            01-01-89 THRU 01-01-93          TN69                  TIME 15:38 DATE 03-02-1998
CONTROL-4: ALL
 SHIFT-CODE:  INCLUDE ALL             PAY-FREQUENCY:  INCLUDE ALL
                                       EMPLOYEE   ----- CONTROL ------             HED                          PERIOD    REGULAR OVERTIME
DEPT  EMPLOYEE NAME                     NUMBER    THREE FOUR FIVE SIX    FUNCTION   NBR  HED NAME                 DATE     HOURS    HOURS
MANU  MERTZ, LYNNE C.                  1006             MAIN      1234               013  3RD SHIFT PREM  01-15-1998    3.78     .00
                                                                   3456               013  3RD SHIFT PREM  01-15-1998     .42     .00
                                                                   9012               013  3RD SHIFT PREM  01-15-1998     .80     .00
                                                        MANU       1234               013  3RD SHIFT PREM  01-15-1998    2.25     .00
                                                        DIST                          013  3RD SHIFT PREM  01-16-1998    3.70     .00
                                                                                      013  3RD SHIFT PREM  01-16-1998    2.97     .00
                                                              103                     013  3RD SHIFT PREM  01-16-1998    1.33     .00
                                                              103                     012  2ND SHIFT PREM  01-16-1998     .00     .50
                                                                                      013  3RD SHIFT PREM  01-17-1998    8.00     .00
                                                                                      012  2ND SHIFT PREM  01-17-1998     .00     .50
                                                                                      013  3RD SHIFT PREM  01-18-1998    5.00     .00

MANU  MAURICE, STACY E.                1008                                           012  2ND SHIFT PREM  01-15-1998    7.00     .00
                                                                                      013  3RD SHIFT PREM  01-15-1998    1.00     .00
                                                                                      011  1ST SHIFT PREM  01-15-1998     .00    1.00
                                                                                      012  2ND SHIFT PREM  01-16-1998    7.00     .00
                                                                                      013  3RD SHIFT PREM  01-16-1998    1.00     .00
                                                                                      011  1ST SHIFT PREM  01-16-1998     .00    2.50
                                                                                      012  2ND SHIFT PREM  01-17-1998    4.00     .00
                                                 03           104                     012  2ND SHIFT PREM  01-19-1998    3.70     .00
                                                                                      012  2ND SHIFT PREM  01-19-1998    2.80     .00
                                                                                      013  3RD SHIFT PREM  01-19-1998    1.50     .00
                                                                                      011  1ST SHIFT PREM  01-19-1998     .00    1.50
                                                 02                                   012  2ND SHIFT PREM  01-20-1998    3.30     .00
                                                     PURC                             012  2ND SHIFT PREM  01-20-1998    3.10     .00
                                                     PURC                             013  3RD SHIFT PREM  01-20-1998    1.00     .00
                                                                                      012  2ND SHIFT PREM  01-21-1998    4.60     .00
                                                                                      013  3RD SHIFT PREM  01-21-1998     .00     .07
                                                           104                        013  3RD SHIFT PREM  01-21-1998     .00     .67
                                                     MAIN                             013  3RD SHIFT PREM  01-21-1998     .00     .92
                                                     DIST                             013  3RD SHIFT PREM  01-21-1998     .00     .25
                                                     DIST                             011  1ST SHIFT PREM  01-21-1998     .00    1.49
                                                 01                                   013  3RD SHIFT PREM  01-22-1998     .00    1.00
                                                     DIST                             013  3RD SHIFT PREM  01-22-1998     .00    1.10
MAIN                      013  3RD SHIFT PREM  01-22-1998     .00   4.40
```

Schedule vs. Actual Hours report (TN68PT)

The Scheduled vs. Actual Hours report (TN68PT) lists the scheduled hours according to the employee's schedule for a given date versus the actual hours worked.

Prior to executing this report, you must apply clock transactions (rings) to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) to select either of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business task:

- Displaying the number of actual hours worked per day, versus the number of hours scheduled for each employee.
- Assisting management with budgeting and scheduling employee time.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Ctrl Three - Six
Organization level three to six assigned to this employee

Function
Function assigned to this employee

Sched Nbr
Employee's three-character alphanumeric Schedule Number

Sub-Schedule Number
Employee's two-character alphanumeric Schedule Number

Earning Date
The date the hours were earned

HED Nbr
HED number of the earned hours

HED Name
HED description

Sched Hours
The total number of hours the employee is meant to work

HED Nbr
HED number of the earned hours

HED Name
HED description

Shift
The shift code for the earned hours

Regular Hours
The number of Regular hours an employee has earned for the particular HED

Overtime Hours
The number of Overtime hours an employee has earned for the particular HED

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, SAVE-DATE and SORT-KEY-SEP-3.

Report totals

Totals are reported on Employee-Number, Organization level 4, Organization, and grand total.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee Pay Frequency to narrow your selection

See also:

- Schedule vs. Actual Hours report (TN68PT) - Example ***(on page 351)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

Schedule vs. Actual Hours report (TN68PT) - Example

```
CORPORATION  99   ACME MANUFACTURING            SCHEDULED VS. ACTUAL HOURS         REPT                                PAGE      1
DIVISION     9999 MIDWESTERN DIVISION             01-01-89 THRU 01-01-93           TN68                TIME 15:38 DATE 03-02-1998
CONTROL-4: ALL
SHIFT-CODE:  INCLUDE ALL                PAY-FREQUENCY:  INCLUDE ALL
                       EMPLOYEE    ----- CONTROL ------             SCHED  EARNINGS  SCHED  HED  EARNINGS       S  REGULAR  OVERTIME
DEPT  EMPLOYEE NAME     NUMBER     THREE FOUR FIVE SIX   FUNCTION    NBR     DATE    HOURS  NBR  DESCRIPTION    C   HOURS    HOURS

MANU  MERTZ, LYNNE C.   1006             MAIN      1234             23000 01-15-1998 07:30  001  REGULAR PAY    3     3.78      .00
                                                    3456                                     001  REGULAR PAY    3      .42      .00
                                                    9012                                     001  REGULAR PAY    3      .80      .00
                                         MANU       1234                                     001  REGULAR PAY    3     2.25      .00

                                                                                                    **ACTUAL HOURS:           7.25

                                         DIST                                  01-16-1998        001  REGULAR PAY    3     3.70      .00
                                                                                                  001  REGULAR PAY    3     2.97      .00
                                               103                                                001  REGULAR PAY    3     1.33      .00
                                               103                                                003  OVERTIME PAY   2      .00      .50

                                                                                                    **ACTUAL HOURS:           8.50

                                                                               01-17-1998         001  REGULAR PAY    3     8.00      .00
                                                                                                  003  OVERTIME PAY   2      .00      .50

                                                                                                    **ACTUAL HOURS:           8.50

                                                                               01-18-1998         001  REGULAR PAY    3     5.00      .00

                                                                                                    **ACTUAL HOURS:           5.00

MANU  MAURICE, STACY    1008                                                16000 01-15-1998 07:30  001  REGULAR PAY    2     7.00      .00
                                                                                                  001  REGULAR PAY    3     1.00      .00
                                                                                                  003  OVERTIME PAY   1      .00     1.00

                                                                                                    **ACTUAL HOURS:           9.00
```

Scheduled vs. Actual Time report (6F-RPT)

The Scheduled vs. Actual Time report (6F-RPT) provides a detailed listing of the original Ring data as compared to the scheduled activity for the employee. Both tardy information and schedule deviations are presented on this report.

Business Tasks

This report is used to complete the following business tasks:

- Showing employee expected activities versus actual activities.
- Verifying employee time outside of the schedule, determining the need for disciplinary action, and evaluating the necessity for shift changes and activity levels.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Schedule Number

Date of Event
Date the activity took place

Name of Event
Name of activity, Clock Start, Meal Start and so forth

Time Scheduled
The time the activity should have taken place

Actual Time
The actual time the employee carried out the activity

RING Status
Displays the clock transaction (ring) Status for the activity

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, RING-DATE, RING-TIME and RING-CODE.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection.

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee Pay Frequency to narrow your selection

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three employee Schedules and Sub-Schedules to narrow your selection

See also:

- Scheduled vs. Actual Time report (6F-RPT) - Example ***(on page 353)***

For information on this report.

- **Setting Up Schedules** ***(on page 141)***

For information on Schedules.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

Scheduled vs. Actual Time report (6F-RPT) - Example

```
CORPORATION  99   ACME MANUFACTURING            SCHEDULED VS. ACTUAL TIME       REPT                                PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2            01-19-1998 THRU 01-25-1998      6F-R                  TIME 08:48 DATE 02-11-1998

CONTROL-4:  ALL                    INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL            PAY-FREQUENCY: INCLUDE ALL

                                      EMPLOYEE    SCHEDULE  SUB-SCHED    DATE                        TIME    ACTUAL      RING
DEPT   EMPLOYEE NAME                  NUMBER      NUMBER    NUMBER     OF EVENT     NAME OF EVENT  SCHEDULED  TIME      STATUS

       YARDLEY, EARL                  1119         800        02       01-19-1998   Clock Start      16:00   16:29      Active
                                                   800        02       01-19-1998   Meal Start       10:30   19:00      Active
                                                   800        02       01-19-1998   Meal End         11:00   19:29      Active
                                                   800        02       01-20-1998   Clock End        24:00   01:00      Active
                                                   800        02       01-20-1998   Clock Start      16:00   16:31      Active
                                                   800        02       01-20-1998   Meal Start       10:30   19:30      Active
                                                   800        02       01-21-1998   Meal End         11:00   01:00      Active
                                                   800        02       01-21-1998   Clock End        24:00   16:30      Active
                                                   800        02       01-21-1998   Clock Start      16:00   19:00      Active
                                                   800        02       01-21-1998   Meal Start       10:30   19:39      Active
                                                   800        02       01-22-1998   Meal End         11:00   01:39      Active
                                                   800        02       01-22-1998   Clock End        24:00   16:29      Active
                                                   800        02       01-22-1998   Clock Start      16:00   19:00      Active
                                                   800        02       01-22-1998   Meal Start       10:30   19:15      Active
                                                   800        02       01-23-1998   Meal End         11:00   01:39      Active
```

Time Reporting Detail report (TN66PT)

The Time Reporting Detail report (TN66PT) lists hours earned in both regular and overtime earnings categories. These categories are separated further if any labor information is included in the time entry Organization level or Function option list. It assists supervisors with cost detail, budgeting, and planning concerning employees' hours.

Prior to executing this report, you must execute the Time Entry Validation/Creation form (TMCARD), to select either of the following two options in the Function options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business task:

- Balancing payroll, monitoring earned paid hours, and monitoring hours worked on the shop floors and other cost centers.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Shift Code
Displays the employee's Shift Code

Period Date
The date the hours were earned

HED Nbr
HED number of the earned hours

HED Name
HED description

Ctrl Three
Organization level Three of the earned hours

Ctrl Four
Organization level Four of the earned hours

Ctrl Five
Organization level Five of the earned hours

Ctrl Six
Organization level Six of the earned hours

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, SAVE-DATE and SORT-KEY-SEP-3.

Report totals

Totals are reported on Employee-Number, Organization level 4, Organization, and grand total.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee pay frequency to narrow your selection

See also:

- Time Reporting Detail report (TN66PT) - Example ***(on page 357)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

Time Reporting Detail report (TN66PT) - Example

```
CORPORATION  99   ACME MANUFACTURING               TIME REPORT                    REPT                                PAGE    3
DIVISION     9999 MIDWESTERN DIVISION         01-01-1998 THRU 01-01-1998          TN66               TIME 15:38 DATE 03-02-1998

CONTROL-4: ALL
SHIFT-CODE:  INCLUDE ALL               PAY-FREQUENCY:  INCLUDE ALL

                                EMPLOYEE    PERIOD  HED                  REGULAR OVERTIME ----- CONTROL ------ SHIFT
DEPT EMPLOYEE NAME               NUMBER      DATE   NBR HED NAME          HOURS   HOURS   THREE FOUR FIVE SIX  FUNCTION   CODE

MANU MOHR, MICHAEL T.            1010                                      .00    .00   0102  10L3 1

                                                        **DAILY TOTALS:     .00    .00

                                        01-15-1998 001 REGULAR PAY         8.00    .00                                  1
                                                   011 1ST SHIFT PREM      8.00    .00                                  1

                                                        **DAILY TOTALS:    8.00    .00

                                        01-16-1998 001 REGULAR PAY         7.50    .00                                  1
                                                   011 1ST SHIFT PREM      7.50    .00                                  1

                                                        **DAILY TOTALS:    7.50    .00

                                        01-17-1998 001 REGULAR PAY         8.00    .00                                  1
                                                   011 1ST SHIFT PREM      8.00    .00                                  1
                                                   003 OVERTIME PAY         .00    .75                                  3
                                                   013 3RD SHIFT PREM       .00    .75                                  3

                                                        **DAILY TOTALS:    8.00    .75

                                        01-18-1998 001 REGULAR PAY         3.65    .00                                  1


                                                     **EMPLOYEE TOTALS:   31.50    .80

**TOTALS FOR CONTROL-4: MANU                                             99.75  17.70
```

Time Detail report (TN6SPT) - 80 Char

The Time Detail report (TN6SPT) lists hours earned in both regular and overtime earnings categories. This report can assist supervisors with cost detail, budgeting, and other planning concerning employees' hours.

Prior to executing this report you must import clock transactions to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) to select one of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

This report is similar to the Time Detail (TN66PT) report, but Time Detail (TN6SPT) is printed in an 80-character format, and it does not contain labor information.

Business Tasks

This report is used to complete the following business task:

- Balancing payroll, monitoring earned paid hours, and monitoring hours worked on the shop floors and other cost centers.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Period Date
Displays the date on which the earning was made

HED Nbr
HED number that has been earned by employee

HED Name
Name of HED that employee has earned

Regular Hours
Displays the number of Regular hours an employee has earned for particular HED

Overtime Hours
Displays the number of Overtime hours an employee has earned for particular HED

Report sort order

As delivered, the sort order for this report is Organization, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, SAVE-DATE and SORT-KEY-SEP-3.

Report totals

Totals are reported on Employee-Number, Organization level 4, Organization, and grand total.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 value. This is optional

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

See also:

- Time Detail report (TN6SPT) - 80 Char - Example ***(on page 361)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

- Time Reporting Detail report (TN66PT) ***(see "Schedule vs. Actual Hours report (TN68PT)" on page 348)***

For information on Time Detail (TN66PT) report.

Time Detail report (TN6SPT) - 80 Char - Example

```
CORPORATION  99   ACME MANUFACTURING               TIME                            REPT                                  PAGE     3
DIVISION     9999 MIDWESTERN DIVISION             REPORT                          TN6S                                DATE 03-02-1998
                                                    DATE: 01-01-1998 THRU 01-01-1998
CONTROL-4: ALL        SHIFT-CODE:  INCLUDE ALL                    PAY-FREQUENCY:  INCLUDE ALL
                          EMPLOYEE  PERIOD      HED                 REGULAR OVERTIME
DEPT EMPLOYEE NAME         NUMBER    DATE       NBR HED NAME         HOURS   HOURS

MANU MAURICE, STACY E.    1008       01-22-1998  003 OVERTIME PAY        .00    1.00
                                                 011 1ST SHIFT PREM      .00    1.00

                                                 **DAILY TOTAL:          .00    7.50

                                              **EMPLOYEE TOTAL:        40.00   15.90

MANU MOHR, MICHAEL T.     1010                                          .00     .00

                                                 **DAILY TOTAL:          .00     .00

                                    01-15-1998  001 REGULAR PAY        8.00     .00
                                                011 1ST SHIFT PREM     8.00     .00

                                                 **DAILY TOTAL:         8.00     .00

                                    01-16-1998  001 REGULAR PAY        7.50     .00
                                                011 1ST SHIFT PREM     7.50     .00

                                                 **DAILY TOTAL:         7.50     .00

                                    01-17-1998  001 REGULAR PAY        8.00     .00
                                                011 1ST SHIFT PREM     8.00     .00
                                                003 OVERTIME PAY        .00     .75
                                                013 3RD SHIFT PREM      .00     .75

                                                 **DAILY TOTAL:         8.00     .75


                                              **EMPLOYEE TOTAL:        31.50     .80

**TOTAL FOR CONTROL-4: MANU                                           99.75   17.70
```

Time Details/Totals report (TN64PT)

The Time Details/Totals (TN64PT) report is used to track the hours earned in both regular and overtime earnings categories. Labor information is also provided, if specified in your Organization level and Function option list.

Prior to executing this report, you must execute the Time Entry Validation/Creation form (TMCARD) to select one of the following two options in the Function options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Business Tasks

This report is used to complete the following business task:

- Assisting supervisors with cost detail, budgeting, and planning concerning employees' hours.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Shift Code
Employee's Shift Code

Period Date
The date the hours were earned

HED Nbr
HED number of the earned hours

HED Name
HED description

Regular Hours
The number of Regular hours for a particular HED

Overtime Hours
The number of Overtime hours for a particular HED

Ctrl Three
Organization level Three assigned to this employee

Ctrl Four
Organization level Four assigned to this employee

Ctrl Five
Organization level Five assigned to this employee

Ctrl Six
Organization level Six assigned to this employee

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, SAVE-DATE and SORT-KEY-SEP-3.

Report totals

Totals are reported on Employee-Number, Organization level 4, Organization, and grand total.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee Pay Frequency to narrow your selection

See also:

- Time Details/Totals report (TN64-RPT) - Example ***(see "Time Details/Totals report (TN64PT) - Example" on page 365)***

For information on this report.

■ **Working with Time Entries** ***(on page 289)***
For information on creating Rings.

Time Details/Totals report (TN64PT) - Example

```
CORPORATION  99   ACME MANUFACTURING              TIME DETAIL/TOTALS              REPT                                PAGE    1
DIVISION     9999 MIDWESTERN DIVISION          01-01-1998 THRU 01-01-1998       TN64                TIME 15:38 DATE 03-02-1998

CONTROL-4: ALL
SHIFT-CODE:  INCLUDE ALL               PAY-FREQUENCY:  INCLUDE ALL
                                EMPLOYEE    PERIOD  HED                  REGULAR OVERTIME ----- CONTROL ------ SHIFT
DEPT EMPLOYEE NAME               NUMBER      DATE   NBR HED NAME          HOURS   HOURS   THREE FOUR FIVE SIX  FUNCTION   CODE

MANU MERTZ, LYNNE C.              1006    01-15-1998 001 REGULAR PAY         3.78    .00         MAIN      1234              3
                                                     001 REGULAR PAY          .42    .00                   3456              3
                                                     001 REGULAR PAY          .80    .00                   9012              3
                                                     001 REGULAR PAY         2.25    .00         MANU      1234              3

                                                         **DAILY TOTALS:     7.25    .00

                                           01-16-1998 001 REGULAR PAY         3.70    .00         DIST                        3
                                                     001 REGULAR PAY         2.97    .00                                     3
                                                     001 REGULAR PAY         1.33    .00               103                   3
                                                     003 OVERTIME PAY         .00    .50               103                   2

                                                         **DAILY TOTALS:     8.00    .50

                                           01-17-1998 001 REGULAR PAY         8.00    .00                                     3
                                                     003 OVERTIME PAY         .00    .50                                     2

                                                         **DAILY TOTALS:     8.00    .50

                                           01-18-1998 001 REGULAR PAY         5.00    .00                                     3

                                                         **DAILY TOTALS:     5.00    .00

                                                       **EMPLOYEE TOTALS:   28.25   1.00
```

Time Errors Detail report (6J-RPT)

The Time/Errors Detail report (6J-RPT) provides comprehensive single-source information regarding earnings, errors, and absenteeism.

If the clock transactions (rings) for a day do not include a valid clock-out (8), the report will indicate 'INCOMPLETE DAY'. If an active employee has no clock transaction (ring) for a day the report will indicate 'EMPLOYEE-NAME', absent on 'MM-DD-CCYY'. Inactive employees do not appear on the report if the DATE-OF-TERMINATION text box is populated and is earlier than the From date. A space is provided for supervisors to specify the reason for the absence.

Prior to running this report you must use the Time Entry Validation/Creation form (TMCARD), to select the Validate, Ring Time Rec Gen, or Absent Time Rec Gen options in the Function options list.

Business Tasks

This report is used to complete the following business tasks:

- Isolating employee activity on the basis of expected activities versus actual activities, citing deviations and errors when applicable.
- Combining pertinent information regarding earnings, errors, and absenteeism. The information is combined to eliminate multiple report runs, saving time and paper.

Report field details

Ctrl Four - Five
Organization level Four - Five assigned to this employee

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Schedule Number

AC
Activity Code

Date of Event
Date of the activity

Sched Time
The time the activity should have taken place

Actual Time
Time of the employee clock transaction (ring)

Error
Error Message

Rounded Time
The rounded time of the clock transaction

Elapsed Time
The amount of time between an activity's rounded start time and end time

Unpaid Breaks Total
The amount of time tracked to unpaid break and meal activities for a particular date

Paid Hours Total
The amount of time to be generated as paid time on time entries (Elapsed time minus unpaid breaks)

Report sort order

As delivered, the sort order for this report is ORGANIZATION LEVEL 4, ORGANIZATION LEVEL 5, ORGANIZATION LEVEL 6, EMPLOYEE NAME, EMPLOYEE NUMBER, RING-DATE, RING-TIME, and RING-CODE.

Report page breaks

The report will page break at Organization level 4 and at Organization.

Report totals

The report will print subtotal of hours at Organization level 4 and print grand total by Organization.

Time Errors Detail report (6J-RPT) (cont.)

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to narrow your selection

Organization level 5
Select an employee Organization level 5 to narrow your selection

Organization level 6
Select an employee Organization level 4 to narrow your selection

Shift
Select an employee shift to narrow your selection

Pay Frequency
Select an employee Pay Frequency to narrow your selection

See also:

- Time Errors Detail report (6J-RPT) - Example ***(on page 369)***

For information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on completing the parameters for this report.

Time Errors Detail report (6J-RPT) - Example

```
CORPORATION  99     ACME MANUFACTURING    TIME/ERRORS DETAIL REPORT            REPT                                  PAGE     4
DIVISION     9999 PRODUCTION CTL 1-2      01-19-1998 THRU 01-25-1998           6J-R                    TIME 08:41 DATE 02-11-1998

CONTROL-4:  ALL  CONTROL-5: ALL  CONTROL-6: ALL
SHIFT-CODE: INCLUDE ALL        PAY-FREQUENCY: INCLUDE ALL

    CONTROL     EMPLOYEE  EMPLOYEE             SCHEDULE  A  DATE        SCHED  ACTUAL         ROUNDED  ELAPSED  UNPAID  PAID
  4    5    6   NUMBER    NAME                 NUMBER    C  OF EVENT    TIME   TIME   ERROR    TIME     TIME     BREAKS  HOURS  AUTH

ADM             1112      JOHNSEN, RICH DANIEL 800-01    1  01-19-1998  08:00  07:48  WARNING  07:48
                                                                                 ***   I N C O M P L E T E   D A Y   *** _____

                                                          ?  01-19-1998  11:16         SCHED-ERR *** UNKNOWN ACTIVITY CODE **
                                                          ?  01-19-1998  11:42                   *** UNKNOWN ACTIVITY CODE **
                                                          ?  01-19-1998  16:58         SCHED-ERR *** UNKNOWN ACTIVITY CODE **
                                                          *  01-20-1998  ***  ACTIVE EMPLOYEE - NO TIME  ***  REASON:____________
                                                          1  01-21-1998  08:00  08:02           08:00
                                                          4  01-21-1998  10:30  12:40  WARNING  12:36
                                                          5  01-21-1998  11:00  13:02  WARNING  13:00    00:24
                                                          8  01-21-1998  16:00  16:00           16:00    08:00    00:24   07:36
                                                          1  01-22-1998  08:00  07:15  WARNING  07:18
                                                          4  01-22-1998  10:30  12:42  WARNING  12:42
                                                          5  01-22-1998  11:00  13:05  WARNING  13:00    00:18
                                                          8  01-22-1998  16:00  16:38  WARNING  16:36    09:18    00:18   09:00
                                                          1  01-23-1998  08:00  08:00           08:00
                                                          4  01-23-1998  10:30  12:10  WARNING  12:06
                                                          5  01-23-1998  11:00  13:01  WARNING  13:00    00:54
                                                          8  01-23-1998  16:00  18:05  WARNING  18:00    10:00    00:54   09:06
                                                          *  01-24-1998  ***  ACTIVE EMPLOYEE - NO TIME  ***  REASON:____________
```

Error Reports

Error Report (62-RPT)

The Error Report (62-RPT) provides a listing of all employees who have error conditions, for example, WARNING and REJECT based on the parameters set up on the Policy Activities table (PT2SCR) and the Schedule Activities table (ST2SCR).

This report is an excellent source for identifying employees/departments working many overtime hours. It is also useful in identifying employees who are consistently tardy and/or fail to comply with clocking rules. It may also serve as an indicator whether schedule parameters need to be adjusted.

Prior to executing this report you must import clock transactions to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) to select one of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business task:

- Identifying employees with clock data that does not comply with pre-defined company rules. It lists the employees who are missing a clock punch or exceeding the time ranges for specific activities according to their schedule assignments.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Badge Number
Employee's Badge Number

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Schedule Number
Employee's two-character numeric Sub-Schedule Number

Ring Date
The date the employee swiped the badge reader

Ring Time
The time the employee swiped the badge reader

Reason
Displays the name of the error condition

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, SCHEDULE-TABLE NBR, RING-DATE and RING-TIME.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to refine your selection

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three Schedules and Sub-Schedules you want to include or exclude

See also:

- Error Report (62-RPT) - Example *(on page 375)*

For information on this report.

- **Capturing Employee Work Time** *(on page 253)*

For information on applying Rings to the Employee Database.

- **Working with Time Entries** *(on page 289)*

For information on creating Rings.

Error Report (62-RPT) - Example

```
CORPORATION  99   ACME MANUFACTURING              ERROR REPORT                REPT                                PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2          01-19-1998 THRU 01-25-1998      62-R               TIME 08:48 DATE 02-11-1998

CONTROL-4:  ALL                    INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL            PAY-FREQUENCY: INCLUDE ALL

                                      EMPLOYEE      BADGE      SCHEDULE   SUB-SCHED    RING      RING
DEPT   EMPLOYEE NAME                  NUMBER        NUMBER      NUMBER     NUMBER      DATE      TIME    REASON

       YARDLEY, EARL                 1119              1119     800         02      01-19-1998   16:29   WARNING
                                                                                    01-19-1998   19:00   WARNING
                                                                                    01-19-1998   19:29   WARNING
                                                                                    01-20-1998   01:00   WARNING
                                                                                    01-20-1998   16:31   WARNING
                                                                                    01-20-1998   19:30   WARNING
                                                                                    01-21-1998   01:00   WARNING
                                                                                    01-21-1998   16:30   WARNING
                                                                                    01-21-1998   19:00   WARNING
                                                                                    01-21-1998   19:39   WARNING
                                                                                    01-22-1998   01:39   WARNING
                                                                                    01-22-1998   16:29   WARNING
                                                                                    01-22-1998   19:00   WARNING
                                                                                    01-22-1998   19:15   WARNING
                                                                                    01-23-1998   00:30   WARNING
```

Missing Punch report (64-RPT)

The Missing Punch report (64-RPT) provides a listing of all employees who have a missing meal or break punch. You must have specified Required Minimum or Required Punch in the Punch Type options list on your Policy Activities table and Schedule Activities table.

This report helps you to determine whether an employee worked through a meal break or simply failed to punch for the activity. Employees who consistently abuse company policy regarding required meals and breaks are highlighted. Also, adding the discovered missing punches to the system eliminates errors when the time entries are processed.

Prior to executing this report you must import clock transaction to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) to select the Ring Time Rec Gen option in the Functions options list:

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business task:

- Identifying those employees who are missing required meal and/or break punches.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Schedule Number
Employee's two-character numeric Sub-Schedule Number

Date of Punch
The date on which the activity took place

Name of Event
Name of activity, Clock Start, Meal Start and so forth

Scheduled Start Time
The time the activity should have taken place

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, WORK-DATE, and SCHEDULE-ACTIVITY-CD.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to refine your selection

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three Schedules and Sub-Schedules you want to include or exclude

See also:

- Missing Punch report (64-RPT) - Example ***(on page 379)***
For information on this report.

- Setting Up Time and Attendance Policies ***(on page 97)***
For information on completing this table.

- **Schedule Activities table** ***(on page 144)***

For information on completing this table.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

- Rings/Errors/Hours report (62HRPT ***(see "Rings/Errors/Hours report (62HRPT)" on page 330)***) ***(see "Schedule vs. Actual Hours report (TN68PT)" on page 348)***

For information on the other error reports.

- Time Errors Detail report (6J-RPT) ***(see "Schedule vs. Actual Hours report (TN68PT)" on page 348)***

For information on the other error reports.

Missing Punch report (64-RPT) - Example

```
CORPORATION  99   ACME MANUFACTURING          MISSING PUNCH REPORT            REPT                                    PAGE     1
DIVISION   9999 PRODUCTION CTL 1-2          01-19-1998 THRU 01-31-1998       64-R                       TIME 10:57 DATE 02-12-1998

CONTROL-4:  ALL                INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL        PAY-FREQUENCY: INCLUDE ALL

                                   EMPLOYEE    SCHEDULE SUB-SCHED      DATE                          SCHEDULED
DEPT   EMPLOYEE NAME               NUMBER       NUMBER   NUMBER      OF PUNCH    NAME OF EVENT     START TIME

ADM    WELKER, GEORGE W           1114           800       01       01-20-1998   Meal    Start        10:30
                                                 800       01       01-23-1998   Meal    Start        10:30

                                                                                                  CORPORATION  99   ACME MANUFACTURING
MISSING PUNCH REPORT           REPT                                      PAGE     2
DIVISION   9999 PRODUCTION CTL 1-2          01-19-1998 THRU 01-31-1998       64-R                       TIME 10:57 DATE 02-12-1998

CONTROL-4:  ALL                INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL        PAY-FREQUENCY: INCLUDE ALL

                                   EMPLOYEE    SCHEDULE SUB-SCHED      DATE                          SCHEDULED
DEPT   EMPLOYEE NAME               NUMBER       NUMBER   NUMBER      OF PUNCH    NAME OF EVENT     START TIME

MAIN   SWEENY, BARBARA            1115           800       01       01-19-1998   Meal    Start        10:30
```

Roster Reports

Roster Report (61-RPT)

The Roster Report (61-RPT) provides you with a listing of all employees based on a condition code of either Absent, Unscheduled or On Premises. This report can be run immediately after polling the clocks to verify attendance.

This report allows you to identify, at the start of a shift, those employees who have not clocked in so that replacements may be called. Unscheduled employees are flagged accordingly so that they are not confused with those who are absent. This report may also be used to identify employees who are working outside of their regular scheduled hours. An employee is reported on the premises if the clock transaction (ring) time is no more that six hours before the employee's schedule's Early Start Reject time and before its Late End Reject time.

Business Tasks

This report is used to complete the following business tasks:

- Identifying employees as being present or absent on a specified date and time. It is to be run for a single date for current information only.

Report field details

Department
Employee's Department

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Schedule Number
Employee's two-character numeric Sub-Schedule Number

Employee Name
Employee's legal Name

Badge Number
Employee's Badge Number

Employee Number
Unique employee identifier, up to 10 characters in length

Ring Date
The date the employee swiped the badge reader

Ring Time
The time the employee swiped the badge reader

Condition
Displays the condition code, either Absent, Unscheduled, or On Premises

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, SCHEDULE-TABLE-KEY and EMPLOYEE NUMBER.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to refine your selection

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three Schedules and Sub-Schedules you want to include or exclude

See also:

- Roster Report (61-RPT) - Example ***(on page 383)***

For more information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- Time Errors Detail report (6J-RPT) ***(see "Schedule vs. Actual Hours report (TN68PT)" on page 348)***

For information on the other roster reports.

Roster Report (61-RPT) - Example

```
CORPORATION  99     ACME MANUFACTURING           ROSTER REPORT        REPT                                      PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2             FROM 01-19-1998      61-R                          TIME 08:37 DATE 02-10-1998

CONTROL-4:  ALL                      INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL              PAY-FREQUENCY: INCLUDE ALL

      SCHEDULE    SUB-SCHED                                  BADGE      EMPLOYEE       RING      RING
DEPT   NUMBER      NUMBER     EMPLOYEE NAME                  NUMBER      NUMBER        DATE      TIME    CONDITION

ADM    900           00       JOHNSEN, RICH DANIEL             1112    1112        01-19-1998   07:48
ADM    900           00       BARTHOLOW III, JONATHAN          1113    1113                     00:00   ABSENT
ADM    900           00       WELKER, GEORGE W                 1114    1114        01-19-1998   08:00

CORPORATION  99   ACME MANUFACTURING             ROSTER REPORT        REPT                                      PAGE   1
DIVISION     9999 PRODUCTION CTL 1-2             FROM 01-19-1998      61-R                          TIME 08:37 DATE 02-10-1998

CONTROL-4:  ALL          INCLUDE ALL SCHEDULES
SHIFT-CODE: INCLUDE ALL        PAY-FREQUENCY: INCLUDE ALL

      SCHEDULE    SUB-SCHED                                  BADGE      EMPLOYEE       RING      RING
DEPT   NUMBER      NUMBER     EMPLOYEE NAME                  NUMBER      NUMBER        DATE      TIME    CONDITION

MANU    800          02       AUSTIN, STEVEN                  001234    1234                     00:00   ABSENT
```

Badge Reports

Active/Inactive Badges report (68-RPT)

The Active/Inactive Badges report (68-RPT) provides badge number assignment history. All badges issued after the start date entered on the report parameter form are printed on the report.

This report may be used to measure the abuse and cost of employee-issued badges. The history it provides is useful if your company elects to charge employees for replacement of lost badges. It is also helpful to supervisors who must clock in for employees when they forget their badges.

Business Tasks

This report is used to complete the following business task:

- Viewing all badge-number assignments, both active and inactive, for each employee.

Report field details

Department
Employee's Department

Badge Number
Employee's Badge Number

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Issue Date
Displays the date the badge was issued to the employee

Deactivate Date
Displays the date the badge was deactivated

Deactivate Comment
Displays a description of why the badge was deactivated

Report sort order

As delivered, the sort order for this report is DEPARTMENT and BADGE-NUMBER.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format.

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format.

See also:

- Active/Inactive Badges report (68-RPT) - Example ***(on page 387)***
For more information on this report.

- **Setting Up and Maintaining Employee Badge Details** ***(on page 185)***
For information on employee badges.

Active/Inactive Badges report (68-RPT) - Example

```
CORPORATION  99     ACME MANUFACTURING      ACTIVE/INACTIVE BADGES          REPT                                  PAGE     2
DIVISION     9999 PRODUCTION CTL 1-2      01-01-1998 THRU 01-31-1998        68-R                   TIME 08:46 DATE 02-10-1998

                                                 EMPLOYEE      ISSUE     DEACTIVATE
DEPT   BADGE NUMBER   EMPLOYEE NAME              NUMBER         DATE        DATE     DEACTIVATE COMMENT

ADM            1112   JOHNSEN, RICH DANIEL      1112         01-01-1998
ADM            1113   BARTHOLOW III, JONATHAN   1113         01-01-1998
ADM            1114   WELKER, GEORGE W          1114         01-01-1998
CORPORATION  99     ACME MANUFACTURING      ACTIVE/INACTIVE BADGES          REPT                                  PAGE     2
DIVISION     9999 PRODUCTION CTL 1-2      01-01-1998 THRU 01-31-1998        68-R                   TIME 08:46 DATE 02-10-1998

                                                 EMPLOYEE      ISSUE     DEACTIVATE
DEPT   BADGE NUMBER   EMPLOYEE NAME              NUMBER         DATE        DATE     DEACTIVATE COMMENT

MAIN       1115       SWEENY, BARBARA           1115         01-01-1998
CORPORATION  99     ACME MANUFACTURING      ACTIVE/INACTIVE BADGES          REPT                                  PAGE     2
DIVISION     9999 PRODUCTION CTL 1-2      01-01-1998 THRU 01-31-1998        68-R                   TIME 08:46 DATE 02-10-1998

                                                 EMPLOYEE      ISSUE     DEACTIVATE
DEPT   BADGE NUMBER   EMPLOYEE NAME              NUMBER         DATE        DATE   DEACTIVATE COMMENT

MANU       001234     AUSTIN, STEVEN            1234         01-02-1998
MANU       991234     AUSTIN, STEVEN            1234         01-01-1998  01-02-1998      TEST
```

Schedule Reports

Schedule Assignments report (6G-RPT)

The Schedule Assignments report (6G-RPT) lists each employee and his or her activities as defined by the Schedule Master table and the Schedule Activities table.

This report is beneficial for management planning because past, current and future schedules may be run and compared. It may be used to verify that an employee is properly assigned to a schedule, and to check the schedule assignment of an employee when correcting clock transaction (ring) errors.

Note: This report must be executed alone or with other 6xxRPT reports in a report schedule. Do not combine it in a report schedule with TNxxPT reports.

Business Tasks

This report is used to complete the following business task:

- Providing a valuable log of information, including the schedule assigned to each employee, and the start time and length of each activity associated with each schedule. It is typically run when new schedules are in effect.

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Schedule Date
Date employee was assigned to a Schedule

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Schedule Number

Activity
Lists the employees activities

Event Start Time
The time the activity should have taken place

Length of Event
Displays the length of time the activity

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, SCHEDULE-DATE, SCHEDULE-NUMBER, SCHEDULE-SUB-NUMBER, and SCHEDULE-ACTIVITY-CD.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 value (optional)

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

See also:

- Schedule Assignments report (6G-RPT) - Example ***(on page 393)***

For more information on this report.

- **Schedule Activities table** ***(on page 144)***

For information on completing this table.

- **Assigning Employees to Time and Attendance** ***(on page 205)***

For information on assigning employees to Time and Attendance Administration.

- Scheduled vs. Actual Time report (6F-RPT ***(see "Scheduled vs. Actual Time report (6F-RPT)" on page 352)***) ***(see "Schedule vs. Actual Hours report (TN68PT)" on page 348)***

For information on the other schedule reports.

- Schedule vs. Actual Hours report (TN68PT) ***(on page 348)***

For information on the other schedule reports.

Schedule Assignments report (6G-RPT) - Example

```
CORPORATION  99     ACME MANUFACTURING            EMPLOYEE SCHEDULE ASSIGNMENTS    REPT                              PAGE     1
DIVISION     9999 PRODUCTION CTL 1-2                     01-01-1998                 6G-R                  TIME 08:46 DATE 02-10-1998

CONTROL-4: ALL      SHIFT-CODE: INCLUDE ALL              PAY-FREQUENCY: INCLUDE ALL

                                          EMPLOYEE   ASSIGNMENT  SCHEDULE  SUB-SCHED                        EVENT       LENGTH OF
DEPT   EMPLOYEE NAME                      NUMBER       DATE       NUMBER     NUMBER     ACTIVITY           START TIME     EVENT

       BARNES, JOHNSON                  2002         01-01-1998  900          00       Clock In             12:00        08:00

       KWONG, STEVEN S.                 2004         01-01-1998  900          00       Clock In             12:00        08:00

       LANNON, PATRICE                  2007         01-01-1998  900          00       Clock In             12:00        08:00

       WALSH, THEODORE                  3002         01-01-1998  900          00       Clock In             12:00        08:00

       LAUGHLIN, SANDRA T.              3011         01-01-1998  900          00       Clock In             12:00        08:00
```

Scheduling Report (6G1RPT)

The Scheduling Report (6G1RPT) lists the schedule to which each employee is assigned, the effective date of the schedule, and the date the employee was assigned to the schedule.

This report is beneficial for management planning because past, current and future schedules may be run and compared. It may be used to verify that an employee is properly assigned to a schedule and to check the schedule assignment of an employee when correcting clock transaction (ring) errors.

Business Tasks

This report is used to complete the following business task:

- Providing a quick reference of the existing schedule numbers and the employees associated with those schedule numbers

Report field details

Department
Employee's Department

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Schedule Number

Schedule Date
Effective date of Schedule

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Assignment Date
Displays the date the employee was assigned to the Schedule

Report sort order

As delivered, the sort order for this report is ORGANIZATION, SCHEDULE-NUMBER, SUB-SCHEDULE-NUMBER, SCHEDULE-TABLE-DATE, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, and SCHEDULE-DATE.

Parameter options and setup

Start
Enter the start date in MM-DD-CCYY or CCYYMMDD format

End
Enter the end date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 to refine your selection

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

Option
Enter the Schedule Indicator Option to either include (I) or exclude (E) the identified Schedules and Sub-Schedules

Sched/Sub-Schedule
Enter up to three Schedules and Sub-Schedules you want to include or exclude

See also:

- Scheduling Report (6G1RPT) - Example ***(on page 395)***

For more information on this report.

- **Schedule Activities table** ***(on page 144)***

For information on completing this table.

- **Assigning Employees to Time and Attendance** ***(on page 205)***

For information on assigning employees to Time and Attendance Administration.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- Scheduled vs. Actual Time report (6F-RPT ***(see "Scheduled vs. Actual Time report (6F-RPT)" on page 352)***) ***(see "Schedule vs. Actual Hours report (TN68PT)" on page 348)***

For information on the other schedule reports.

- Schedule vs. Actual Hours report (TN68PT) ***(on page 348)***

For information on the other schedule reports.

Scheduling Report (6G1RPT) - Example

```
CORPORATION  99   ACME MANUFACTURING                SCHEDULING REPORT          REPT                              PAGE     1
DIVISION     9999 MIDWESTERN DIVISION           01-01-1997 THRU 01-01-1997     6G1R                TIME 17:21 DATE 03-01-1998

SCHEDULE      SUB-SCHED      SCHEDULE                                              EMPLOYEE      ASSIGNMENT
 NUMBER        NUMBER          DATE        DEPT      EMPLOYEE NAME                 NUMBER          DATE

  160            00         01-01-1998     ADM       O'ROURKE, JUNE               1001          05-22-1998
                                           ADM       KENDALL, WILLIAM             3168          06-01-1998
                                           MANU      JONES, JERRY                 2145          11-15-1998
                                           MANU      TICE, DAVID M.               6023          06-01-1997
                                           MANU      BLAKE, MARY ELLEN            6679          01-01-1997
                                           MANU      DAVIDSON, THOMAS             7082          12-01-1998
                                           MANU      ADKINS, LUKE                 7134          11-15-1997
                                           MANU      BAILES, JAMES T.             7702          01-01-1997
                                           MANU      JOHNSON, CLIFF               8540          01-01-1997
                                           PURC      FARNSWORTH, MASON            2281          02-03-1998
                                           PURC      KAPLAN, MICHAEL              3451          06-01-1997
                                           PURC      CLINE, HOLLY                 5059          09-01-1998
                                           PURC      THOMAS, SCOTT                6154          07-15-1998
                                           PURC      ABNER, TRACY                 9389          01-01-1997

  800            00         01-01-1997     ADM       KRAMER, ALICE                2290          08-04-1998
                                           ADM       BAKER, HELEN                 2671          01-15-1998
                                           ADM       SPURLOCK, POLLY              3683          03-22-1998
                                           ADM       HARBOR, LOU                  6098          01-01-1997
                                           ADM       JOHNSON, EDWARD              9372          01-01-1997
```

Time and Attendance Schedule Table report (6H-RPT)

The Time and Attendance Schedule Tables report (6H-RPT) provides a listing of all Policy and Schedule tables that exist on your System Control Repository, along with their corresponding activities.

This report helps to identify obsolete schedules that should be deleted. Also, when changing the rules for a Policy Master record, the report helps to identify which schedules tied to that record will be affected.

Report field details

Schedule Number
Employee's three-character alphanumeric Schedule Number

Sub-Sched Number
Employee's two-character alphanumeric Schedule Number

Schedule Date
Effective date of Schedule

Policy Number
Three-character alphanumeric Policy Number

Sub-Policy Number
Two-character numeric Sub-Policy Number

Policy Description
User defined description of policy

Auto Overtime
Displays the Alternate Overtime code

Policy HED
The default HED number for this policy. This is normally '001' for regular pay

Calend Rtne Factor
Displays the code for the selected Calendar Routine. For example 1 Time Grace All is displayed as 1

Earn Code Xref
Displays a four-character alphanumeric Earnings Code identifier.

Shift Prem-Xref
Displays a four-character alphanumeric Shift Premium identifier

Round Routine
Displays the Round Routine/One Time Grace Indicator

Activities
Lists activities defined for each Schedule table

Paid Ind
Indicates whether the activity is paid or unpaid

Punch Type
Indicates the activity's Punch Type option

Event Start
The scheduled Start Time for the activity

Length Event
Schedule time length for the activity

Hours Paid
Total numbers of hours that are paid for the activity

Early/Late Start Rnd
Round value for the activity condition

Early/Late Start Grc
Grace value for the activity condition

Early/Late Start Warn
Warning value for the activity condition

Early/Late Start Reject
Reject value for the activity condition

Early/Late End Rnd
Round value for the activity condition

Early/Late End Grc
Grace value for the activity condition

Early/Late End Warn
Warning value for the activity condition

Early/Late End Reject
Reject value for the activity condition

Report sort order

As delivered, the sort order for this report is SCHEDULE-TABLE NBR, SCHEDULE- TABLE-DATE, FLEXIBLE-TIME-IND, AUTO-OVERTIME-IND, POLICY-TABLE-HED, CALENDAR-ROUTINE, CALENDAR-FACTOR, EARNINGS-CODE-XREF, SHIFT-PREMIUM-XREF and SCHEDULE-KEY.

Parameter options and setup

There are no report parameters for this report.

See also:

- Time and Attendance Schedule Table report (6H-RPT) - Example ***(on page 399)***

For more information on this report.

- What are policy tables? ***(on page 99)***

For information on completing this table.

- **Schedule activities table** ***(on page 144)***

For information on completing this table.

- Scheduled vs. Actual Time report (6F-RPT ***(see "Scheduled vs. Actual Time report (6F-RPT)" on page 352)***) ***(see "Schedule vs. Actual Hours report (TN68PT)" on page 348)***

For information on the other schedule reports.

- Schedule vs. Actual Hours report (TN68PT) ***(on page 348)***

For information on the other schedule reports.

Time and Attendance Schedule Table report (6H-RPT) - Example

```
CORPORATION  99     ACME MANUFACTURING             TIME AND ATTENDANCE            REPT                          PAGE    1
DIVISION     9999 PRODUCTION CTL 1-2                SCHEDULE TABLES              6H-R          TIME 08:48 DATE 02-10-1998

SCHEDULE   SCHEDULE      POLICY                              FLEX   AUTO   POLICY -CALENDAR   EARN CODE   SHIFT     ROUND
NUMBER      DATE         NUMBER     POLICY DESCRIPTION       TIME OVERTIME  HED   RTNE FACTOR   XREF    PREM-XREF  ROUTINE

 800-03     01-01-1998   900-00    Crew Rotation - 3rd Shift                001    01           A999

                  PAID PUNCH EVENT EVENT  HOURS --- EARLY START ---- ---- LATE START ---- ---- EARLY END ----- ----- LATE END -----
ACTIVITIES        IND  TYPE  START LENGTH PAID  RND GRC WARN  REJECT RND GRC WARN  REJECT RND GRC WARN  REJECT RND GRC WARN  REJECT

1  Clock In        Y         07:00 08:00  08:00 06  06  06:55 06:49  06  03  07:03 07:05  06  01  15:00 15:00  06  06  15:05 15:05

 800-02     01-01-1998   900-00    Crew Rotation - 2nd Shift                001    01           A999

1  Clock In        Y         16:00 08:00  08:00  06  06  15:55 15:49  06  03  16:03 16:05  06  01  24:00 24:00  06  06  00:05 00:05

 800-01     01-01-1998   900-00    Crew Rotation - 1st Shift                001    01           A999

1  Clock In     Y            08:00 08:00  08:00  06  06  07:55 07:49  06  03  08:03 08:05  06  01  16:00 16:00  06  06  16:05 16:05

 800-00     01-01-1998   800-00    Schedule Example                         001    01           E999      SP01

1  Clock In     Y            08:00 08:30  08:00  15  10  07:45 07:00  15  10  08:30 09:00  15  01  16:30 16:30  15  15  23:00 23:30
4  Meal Start   N      OM    12:00 00:30  00:00  01  01  12:00 11:59  01  01  13:30 13:31  01  01  12:30 12:15  01  01  13:59 14:001  Clock In
Y            12:00 08:00  08:00  06  06  11:55 11:49  06  03  12:03 12:05  06  01  20:00 20:00  06  06  20:05 20:05
```

Labor Reports

Labor and Hours Summary report (TN67PT)

The Labor and Hours Summary report (TN67PT) describes the labor activities performed by each employee for the requested period. In addition, the earnings category is defined within regular and overtime conditions.

This report can assist management with budgeting, cost, and labor analyses.

Prior to executing this report you must import clock transactions to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) to select one of the following two options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business tasks:

- Identifying the total number of regular and overtime hours worked by location for each employee

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Control Function
Location where the employee has worked

HED Nbr
HED number that has been earned by employee for a particular location

HED Name
HED description

Regular Hours
The number of regular hours an employee has earned for a particular HED

Overtime Hours
The number of Overtime hours an employee has earned for a particular HED

Report sort order

As delivered, the sort order for this report is ORGANIZATION, ORGANIZATION LEVEL 4, EMPLOYEE NUMBER, and 12-HED-NBR.

Report totals

Totals are reported on Employee Number, Organization level 4, Organization, and grand total.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 value. This is optional

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

See also:

- Labor and Hours Summary report (TN67PT) - Example ***(on page 403)***

For more information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

Labor and Hours Summary report (TN67PT) - Example

```
CORPORATION  99   ACME MANUFACTURING            LABOR AND HOURS SUMMARY         REPT                                PAGE     1
DIVISION   9999 PRODUCTION CTL 1-2             01-19-1998 THRU 01-23-1998      TN67                  TIME 08:42 DATE 02-12-1998

CONTROL-4:  ALL
SHIFT-CODE: INCLUDE ALL            PAY-FREQUENCY: INCLUDE ALL

                                      EMPLOYEE                                    HED                      REGULAR   OVERTIME
DEPT   EMPLOYEE NAME                   NUMBER     ------ CONTROL/FUNCTION -------  NBR   HED NAME           HOURS     HOURS

ADM    JOHNSEN, RICH DANIEL            1112       CONTROL 3: Midwest              001   REGULAR PAY         1.90      .00

                                                  CONTROL 3: Eastern              001   REGULAR PAY         4.50      .00

                                                  CONTROL 5: Paper Products       001   REGULAR PAY         8.70      .00

                                                  CONTROL 5: Plastic Product      001   REGULAR PAY         4.50      .00

                                                  CONTROL 6: Wholesale            001   REGULAR PAY         4.50      .00

                                                  CONTROL 4: Administration       001   REGULAR PAY         1.90      .00

                                                  CONTROL 6: Retail               001   REGULAR PAY         8.70      .00

                                                  FUNCTION:  Overhead             001   REGULAR PAY         1.90      .00

                                                  CONTROL 3: Midwest              003   OVERTIME PAY         .00      .10

                                                  CONTROL 3: Eastern              003   OVERTIME PAY         .00     3.10

                                                  CONTROL 5: Paper Products       003   OVERTIME PAY         .00      .10

                                                  CONTROL 5: Plastic Product      003   OVERTIME PAY         .00     3.10

                                                  CONTROL 6: Wholesale            003   OVERTIME PAY         .00     3.10

                                                  CONTROL 4: Administration       003   OVERTIME PAY         .00      .10

                                                  CONTROL 6: Retail               003   OVERTIME PAY         .00      .10

                                                  FUNCTION: Overhead              003   OVERTIME PAY         .00      .10
```

Location Changes report (6E-RPT)

The Location Changes report (6E-RPT) indicates the Organization level and Function values of employees' home locations and indicates any moves from those locations in the Assigned columns.

This report displays all labor movements of employees over a specified period of time. The employee's home location is displayed along with any variances from that location.

Prior to executing this report you must import clock transaction to the Employee Database. You must also use the Time Entry Validation/Creation form (TMCARD) to select one of the following three options in the Functions options list:

- Ring Time Rec Gen
- Absent Time Rec Gen
- Validate

Note: If you fail to perform either of these processes, your report will have no output.

Business Tasks

This report is used to complete the following business task:

- Assisting supervisors in measuring the cost of labor, staffing requirements, and floor control

Report field details

Department
Employee's Department

Employee Name
Employee's legal Name

Employee Number
Unique employee identifier, up to 10 characters in length

Ring Date
Date the employee swiped the badge reader

Ring Time
Time the employee swiped the badge reader

Ctrl Three
Control Three assigned to this employee

Assigned
Displays where the employee is actually assigned if different

Ctrl Four
Control Four assigned to this employee

Assigned
Displays where the employee is actually assigned if different

Ctrl Five
Control Five assigned to this employee

Assigned
Displays where the employee is actually assigned if different

Ctrl Six
Control Six assigned to this employee

Assigned
Displays where the employee is actually assigned if different

Function
Function assigned to this employee

Assigned
Displays where the employee is actually assigned if different

Report sort order

As delivered, the sort order for this report is ORGANIZATION, EMPLOYEE NUMBER, RING-DATE and RING-TIME.

Parameter options and setup

From Date
Enter the from date in MM-DD-CCYY or CCYYMMDD format

To Date
Enter the to date in MM-DD-CCYY or CCYYMMDD format

Organization level 4
Select an employee Organization level 4 value(optional)

Organization level 5
Select an employee Organization level 5 value(optional)

Organization level 6
Select an employee Organization level 6 value(optional)

Shift
Select the work Shift

Pay Frequency
Select the Pay Frequency

See also:

- Location Changes report (6E-RPT) - Example ***(on page 407)***

For more information on this report.

- **Capturing Employee Work Time** ***(on page 253)***

For information on applying Rings to the Employee Database.

- **Working with Time Entries** ***(on page 289)***

For information on creating Rings.

Location Changes report (6E-RPT) - Example

```
CORPORATION  99   ACME MANUFACTURING            CHANGE IN LOCATIONS          REPT                                  PAGE     1
DIVISION   9999 PRODUCTION CTL 1-2          01-19-1998 THRU 01-31-1998       6E-R                    TIME 11:59 DATE 02-12-1998

CONTROL-4: ALL  CONTROL-5: ALL  CONTROL-6: ALL
SHIFT-CODE: INCLUDE ALL             PAY-FREQUENCY: INCLUDE ALL

                          EMPLOYEE     RING    RING  CTRL           CTRL           CTRL           CTRL
DEPT EMPLOYEE NAME         NUMBER      DATE    TIME  THREE ASSIGNED FOUR ASSIGNED FIVE ASSIGNED SIX ASSIGNED FUNCTION   ASSIGNED

ADM  JOHNSEN, RICH D      1112       01-21-1998 14:00                                    103          C
                                     01-22-1998 09:00                                    103          C
                                                13:30 01      02                          104          A
                                     01-23-1998 09:00                                    103          C
                                                13:30 01      02                          104          A
ADM  WELKER, GEORGE       1114       01-19-1998 08:00 01      03     ADM    PURC         105          C
                                     01-20-1998 07:53 01      03     ADM    PURC         105          C
```

Table Reports

Calendar Assignments report (CALEND)

The Calendar Assignments report (CALEND) provides a listing of all Calendar Routines that exist on your System Control Repository, as defined on the following tables:

- Holiday Assignment table
- Type of Day Assignment table
- Type of Holiday Assignment

This report must be executed through the Command Line or the HELP facility. The Calendar Assignments (CALEND) program writes the report to a file called CALEND.03. For a hard copy of the report, you must print the contents of CALEND.03.

Note: The following report cannot be accessed by the Report Group Activities form. It must be executed in batch.

Business Tasks

This report is used to complete the following business task:

- Providing a quick and easy way to view all existing Calendar Routines in numeric and year sequence.

Report field details

Year

Lists the year in which the holidays will be taken, as defined on the Holiday Assignment table

Company Holidays

Lists each date in that year when a particular holiday will take place, as defined on the Holiday Assignment table

TYPEHL

List which Type of Day options have been selected for each day of the week, as defined on the Holiday Assignment table

TYPEDA

List which Type of Day options have been selected for each day of the week, as defined on the Type Of Day Assignment table

Parameter options and setup

This report offers several options. It can be run:

- For all Calendar Tables
- For a range of the Calendar Tables
- For a particular Calendar Table

See also:

- Calendar Assignments report (CALEND) - Example ***(on page 411)***

For more information on this report.

- **Implementing Time and Attendance Administration** ***(on page 57)***

For information on Calendar Routines.

Calendar Assignments report (CALEND) - Example

```
                                                TIME AND ATTENDANCE                                                 PAGE     1
                                                 CALENDAR ROUTINES                                                  DATE:   02/12/98


CALENDAR ROUTINE:   10
*****************************************************************************************************************************************

          ------------------------------------------COMPANY HOLIDAYS-----------------------------------------------
YEAR        1       2       3       4       5       6       7       8       9       10      11      12      13      14      15
1998      01-01   05-25   07-04   09-07   11-26   11-27   12-24   12-25

          SUNDAY             MONDAY            TUESDAY           WEDNESDAY         THURSDAY          FRIDAY            SATURDAY

TYPEHL    Special Holiday   1Regular Holiday  Regular Holiday   Regular Holiday   Regular Holiday   Regular Holiday   Regular Holiday
TYPEDA    Special1 Work     Regular Work      Regular Work      Regular Work      Regular Work      Regular Work      Regular Work


 ----TABLE COMPLETE ----
```

Combination Tables report (COMTAB)

The Combination Tables report (COMTAB) provides a list of Schedule Tables that exist in the System Control Repository, as defined on the Schedule Master and Schedule Activities tables. The program will also list all Calendar Routines, Earnings Code Tables, and Shift Premium Tables that are related to the Schedules.

This report must be executed through the Command Line or the HELP facility. DO NOT INCLUDE IT IN A REPORT SCHEDULE. The COMTAB program writes the report to a file called COMTAB.03. For a hard copy of the report, you must print the contents of COMTAB.03.

Note: This report cannot be accessed with the Report Group Activities form (RGMSTR).It is executed in batch, except for PC/PC-LAN clients, who can execute it online or in batch. Cyborg delivers JCL to run this program.

Business Tasks

This report is used to complete the following business task:

- Providing a quick and easy way to view all or selected Schedule Table records and their associated tables.

Report field details

Policy Table Number
Three-character alphanumeric Policy Number and two-character numeric Sub-Policy Number

Policy Table Date
Effective date of the Policy

Policy Description
User defined description of policy

Policy Table HED
The default HED number for this policy. This is normally '001' for regular pay

Calendar Routine
Two-character Calendar identifier

Earnings Code-Xref
Displays a four-character alphanumeric Earnings Code identifier

Shift Premium-Xref
Displays a four-character alphanumeric Shift

Round Routine
Displays the code for the selected Round Routine. For example 1 Time Grace All is displayed as 1

Parameter options and setup

There are no report parameters for this report.

See also:

- Combination Tables report (COMTAB) - Example ***(on page 413)***

For more information on this report.

- **Setting Up Time and Attendance Policies** ***(on page 97)***

For information on Policy Master tables.

Combination Tables report (COMTAB) - Example

```
CONTROL-1:  99                                    TIME AND ATTENDANCE                                                PAGE:          1
CONTROL-2:  9999                                  COMBINATION TABLES                                                 DATE:   02/13/98
-------------------------------------------------------------------------------------------------------------------------------------

SCHED-TABLE     SCHEDULE                              FLEXIBLE  AUTO-OT  POLICY    CALENDAR  EARNINGS    SHIFT      ROUND
   NUMBER     TABLE-DATE     POLICY-DESCRIPTION        TIME-IND    IND   TABLE-HED  ROUTINE   CODE-XREF  PREM-XREF   ROUTINE
   800-03     01-01-1998     Crew Rotation - 3rd Shift                      001        01        A999


POLICY-TABLE                 1-Clock Start                    ACTIVITY     PUNCH-TYPE      EVENT      LENGTH-OF     HOURS-OF
                                                              PAID-IND        IND          START        EVENT      EVENT-PAID
   900-00                                                         Y                         07:00       08:00        07:30

                                                              -----------E A R L Y----------   ------------L A T E-----------
                                                                    GRACE   WARNING  REJECT          GRACE   WARNING  REJECT
                                                             ROUND  PERIOD   TIME     TIME    ROUND  PERIOD   TIME     TIME
                                                      START:   06      06     06:55    06:49    06      03     07:03    07:05
                                                      END:     06      01     15:00    15:00    06      06     15:05    15:05


                             4-Meal Start                     ACTIVITY     PUNCH-TYPE      EVENT      LENGTH-OF     HOURS-OF
                                                              PAID-IND        IND          START        EVENT      EVENT-PAID
                                                                 N            *RP          10:30        00:30         00:00

                                                              -----------E A R L Y----------   ------------L A T E-----------
                                                                    GRACE   WARNING  REJECT          GRACE   WARNING  REJECT
                                                             ROUND  PERIOD   TIME     TIME    ROUND  PERIOD   TIME     TIME
                                                      START:   06      06     10:00    09:45    06      06     11:00    11:15
                                                      END:     06      06     10:30    10:15    06      06     11:30    11:45


EARNINGS CODE TABLE: A999
*************************************************************************************************************************************

                                                 EARNINGS
PAY-TYPE         TYPE-OF-DAY/DESCRIPTION        CODE-HOURS              HED/DESCRIPTION

PAY PERIOD       1 -   Regular Work                40.00                003 - OVERTIME PAY
```

```
CONTROL-1:  99                                    TIME AND ATTENDANCE                                                PAGE:     2
CONTROL-2:  9999                                  COMBINATION TABLES                                                 DATE:   02/13/98
-------------------------------------------------------------------------------------------------------------------------------------

SCHED-TABLE    SCHEDULE                            FLEXIBLE  AUTO-OT  POLICY    CALENDAR  EARNINGS    SHIFT   ROUND
```

```
   NUMBER     TABLE-DATE     POLICY-DESCRIPTION            TIME-IND    IND   TABLE-HED  ROUTINE   CODE-XREF  PREM-XREF   ROUTINE
   800-02     01-01-1998     Crew Rotation - 2nd Shift                          001       *10       *E999


POLICY-TABLE                1-Clock Start                          ACTIVITY     PUNCH-TYPE      EVENT      LENGTH-OF     HOURS-OF
                                                                   PAID-IND       IND           START      EVENT        EVENT-PAID
   900-00                                                              Y                       *16:00      08:00          07:30

                                                                   ----------E A R L Y----------   ------------L A T E-----------
                                                                         GRACE   WARNING  REJECT          GRACE   WARNING  REJECT
                                                                   ROUND PERIOD   TIME     TIME    ROUND  PERIOD   TIME     TIME
                                                             START:  06     06     15:55    15:49    06     03     16:03    16:05
                                                             END:    06     01     24:00    24:00    06     06     00:05    00:05


                            4-Meal Start                           ACTIVITY     PUNCH-TYPE      EVENT      LENGTH-OF     HOURS-OF
                                                                   PAID-IND       IND           START      EVENT        EVENT-PAID
                                                                       N            *RP          10:30      00:30          00:00

                                                                   ----------E A R L Y----------   ------------L A T E-----------
                                                                         GRACE   WARNING  REJECT          GRACE   WARNING  REJECT
                                                                   ROUND PERIOD   TIME     TIME    ROUND  PERIOD   TIME     TIME
                                                             START:  06     06     10:00    09:45    06     06     11:00    11:15
                                                             END:    06     06     10:30    10:15    06     06     11:30    11:45CALENDAR
ROUTINE:   10                                                                                                  PAGE:         2A
*************************************************************************************************************************************

          ------------------------------------------COMPANY HOLIDAYS-----------------------------------------------
YEAR        1      2      3      4      5      6      7      8      9      10     11     12     13     14     15
1998      01-01  05-25  07-04  09-07  11-26  11-27  12-24  12-25

          SUNDAY           MONDAY           TUESDAY          WEDNESDAY        THURSDAY         FRIDAY           SATURDAY

TYPEHL    Special Holiday 1Regular Holiday  Regular Holiday  Regular Holiday  Regular Holiday  Regular Holiday  Regular Holiday
TYPEDA    Special1 Work    Regular Work     Regular Work     Regular Work     Regular Work     Regular Work     Regular Work
```

APPENDIX B

Time and Attendance Examples

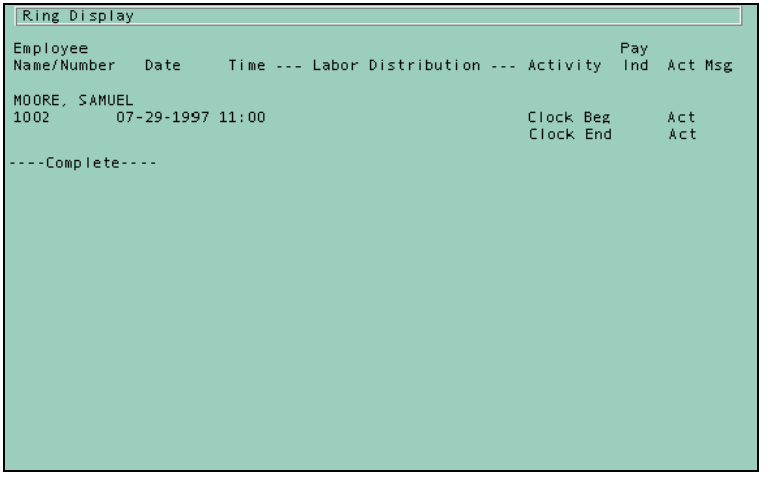
In This Appendix

Introduction

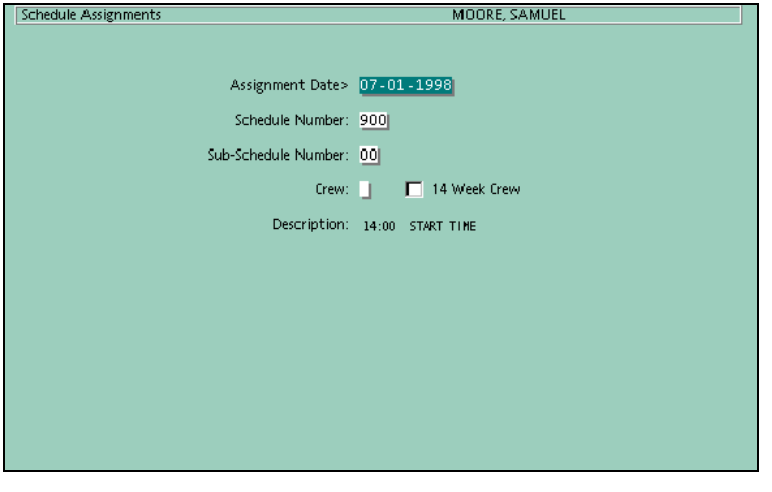
This section provides examples of some Time and Attendance Administration processes that you may find most useful. The examples are intended to further illustrate how Time and Attendance Administration processes different tasks.

Tracking Overtime Hours

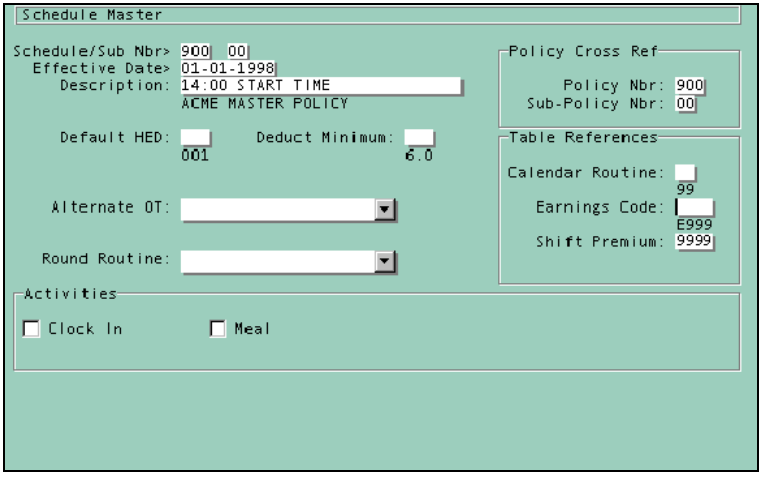
This example shows the various forms used by Time and Attendance Administration to track and calculate an employee's overtime hours.



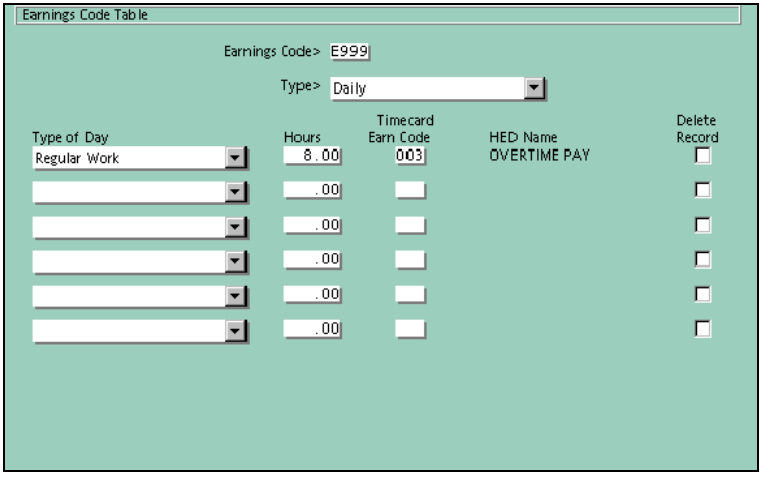
The system will calculate 11 hours of pay for the employee on 7-29-1997. The employee is assigned to schedule 900-00 as shown in the following example.

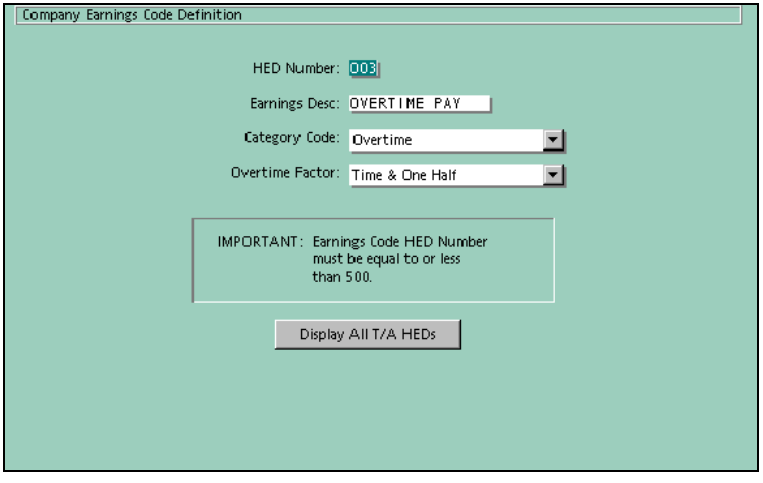


Schedule 900-00 uses Earnings Code table E999.

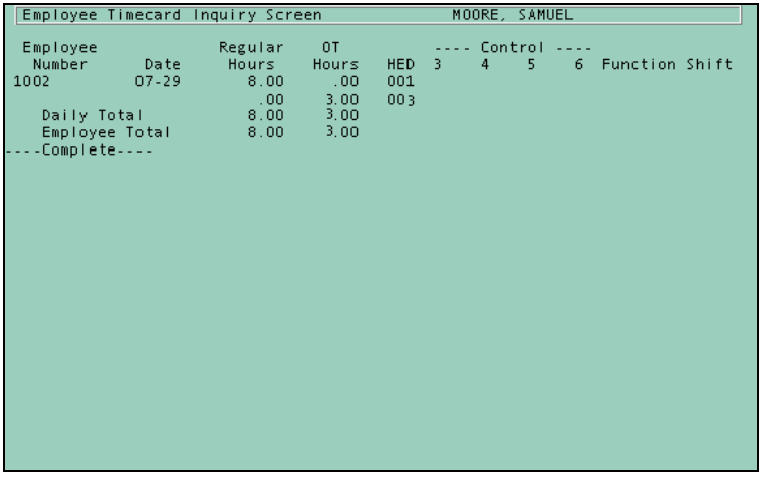


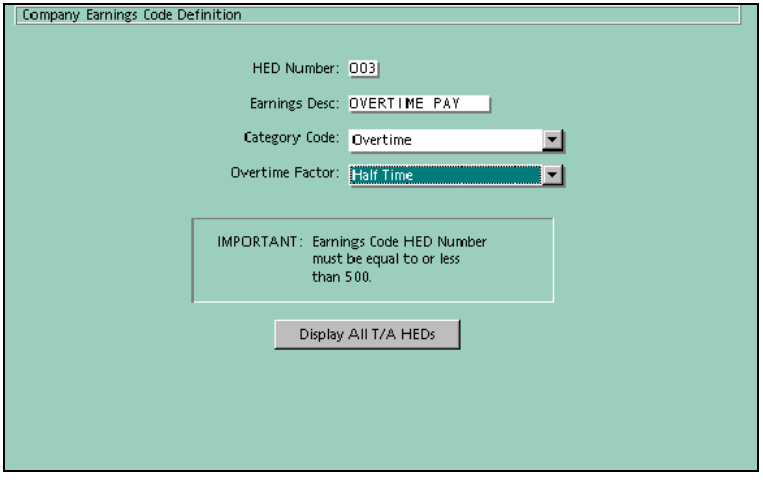
For a Regular Work day, for example. 07-29-1997, any hours over eight will be paid using HED 003.



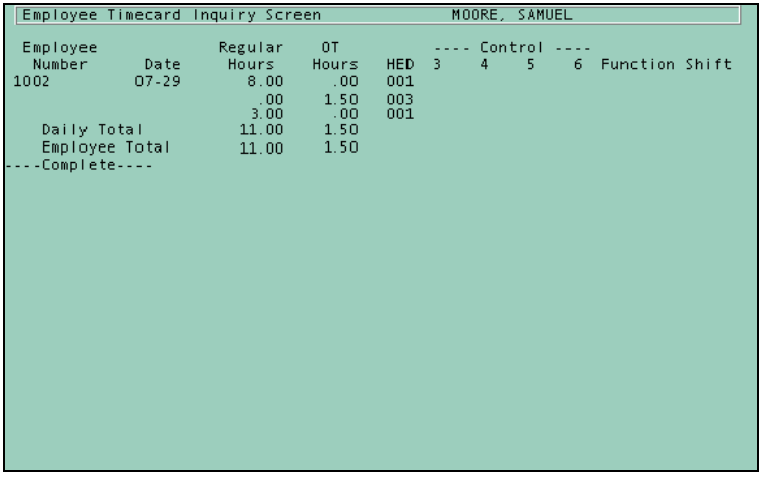


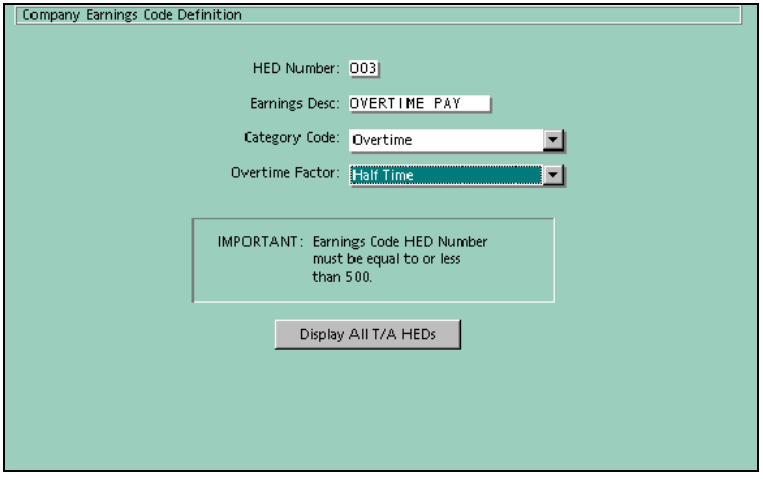
For Overtime Factor Time & One Half (3), eight hours are calculated to the default HED (001) and three to the overtime HED (003).



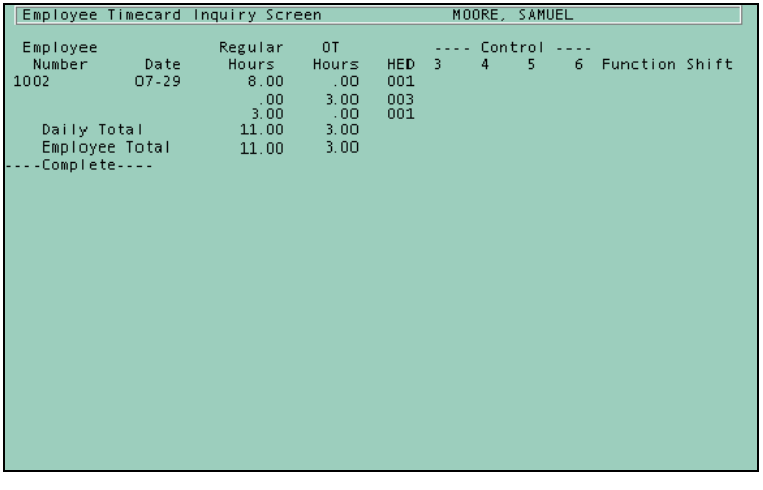


If the Overtime Factor is Straight Time (2), eight hours are calculated to the default HED. All hours over eight (in this case, three hours) are calculated to the overtime HED (003). Half of the default HEDs overtime hours (1.50) are calculated to the overtime HED (003).



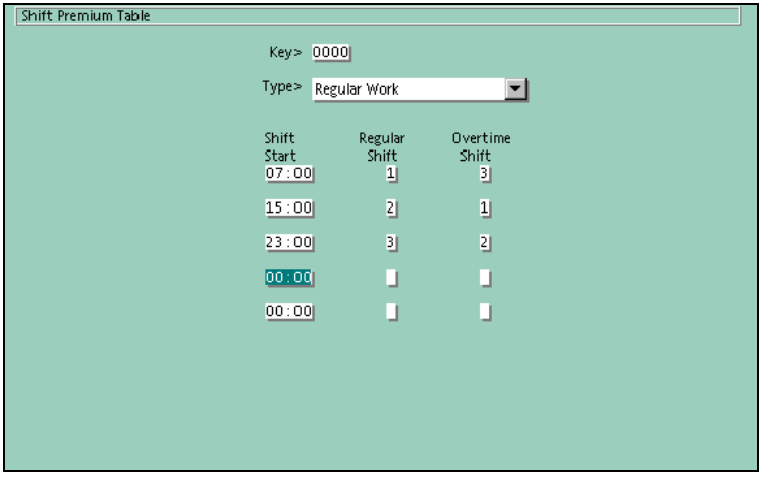


If the Overtime Factor is Half Time (1), eight hours are calculated to the default HED. All hours over eight (in this case, three hours) are calculated to the default HED (001), and the same number (3.00) is calculated to the overtime HED (003).



Tracking Shift Differential By Shift Code

This example shows the various forms which are used by Time and Attendance Administration to track shift differentials by shift code.

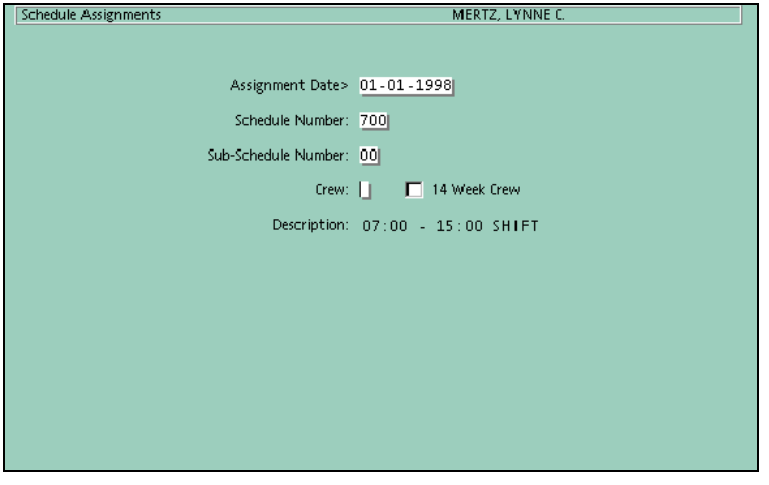


A Shift Premium table (SP-SCR) is used to populate codes to time entries generated by the Time Entry Validation/Creation form (TMCARD). It divides workdays by time intervals.

Shift premium table 0001 for a Regular Work day sets up the time intervals 07:00-15:00, 15:00-23:00, and 23:00-07:00, and invokes the following rules when the Time Entry Validation/Creation form is executed:

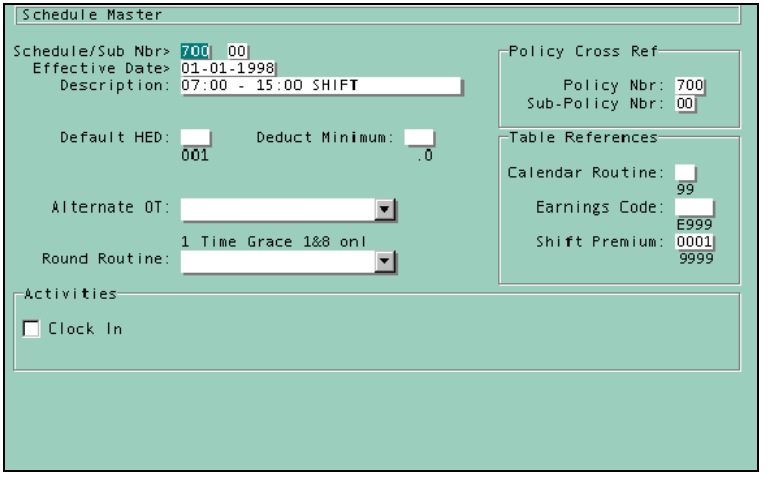
- For rounded clock transaction (ring) times 07:00-15:00 - Time Entries generated for Regular Pay (001) are populated with shift code 1. Time Entries generated for overtime pay are populated with shift code 3.
- For rounded times 15:00-23:00 - Time Entries generated for Regular Pay (001) are populated with shift code 2. Time Entries generated for overtime pay are populated with shift code 1.
- For rounded clock transaction (ring) times of 23:00-07:00 - Time Entries generated for Regular Pay (001) are populated with shift code 3. Time Entries generated for overtime pay are populated with shift code 2.

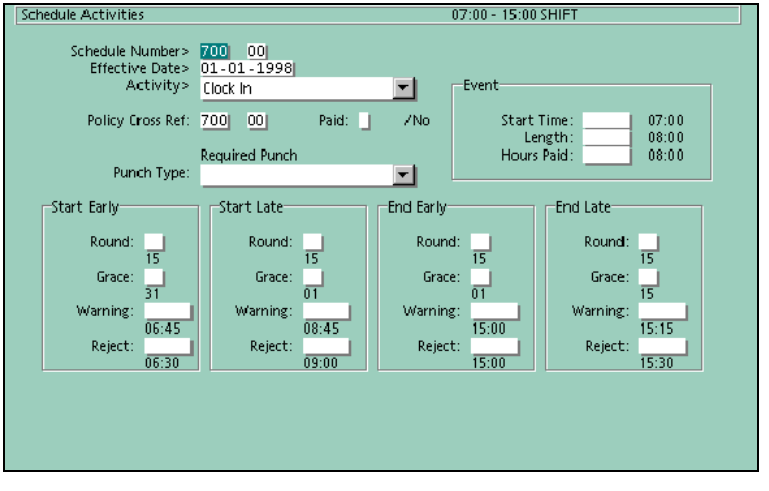
The employee is assigned to Schedule table 700-00.



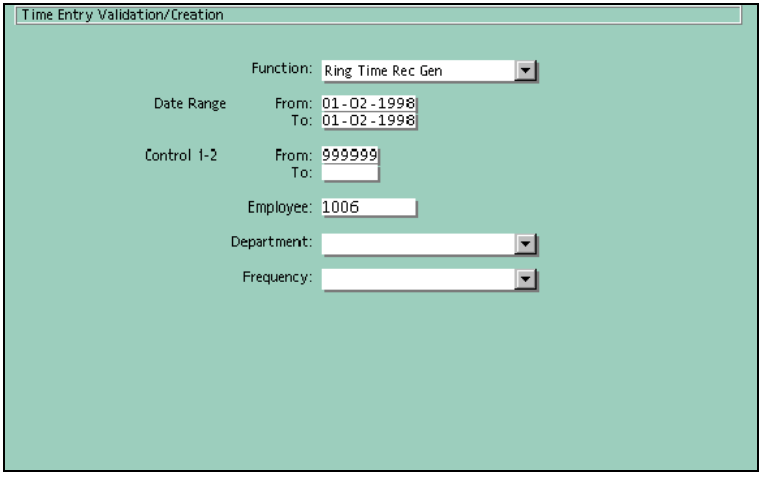
Employee 1006 has clocked in at 06:25 and clocked out at 16:00.

Schedule table 700-00 cross-references Calendar Routine 99, Earnings Code E999, and Shift Premium table 0001.

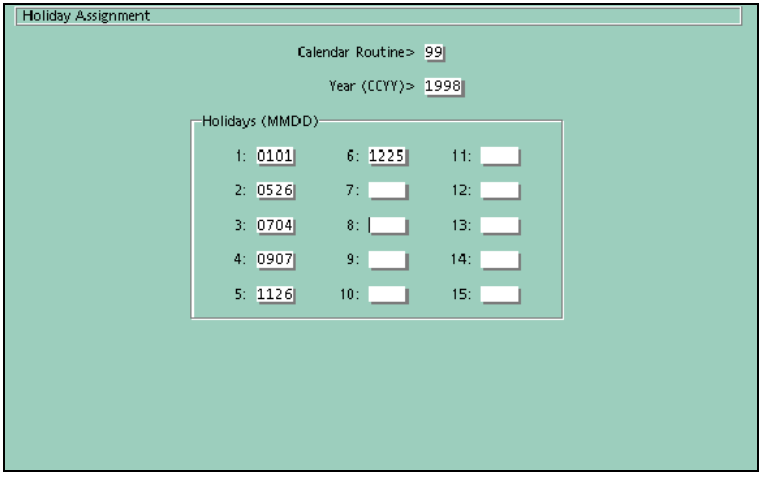




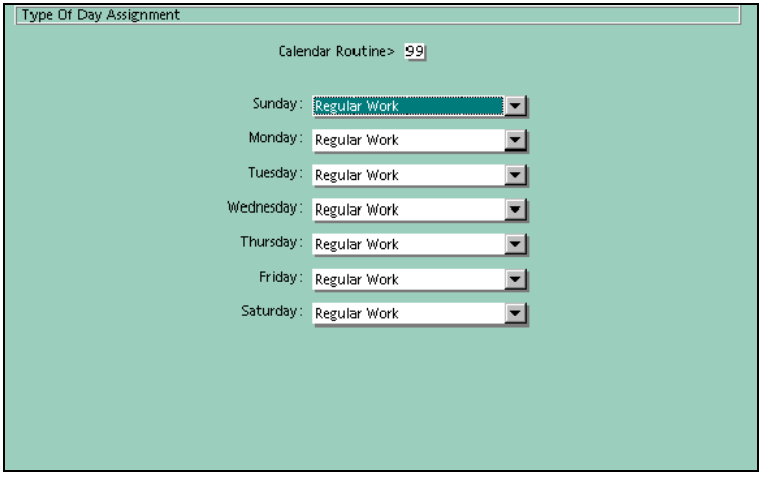
The Time Entry Creation program is run for Friday, 01-02-1998.



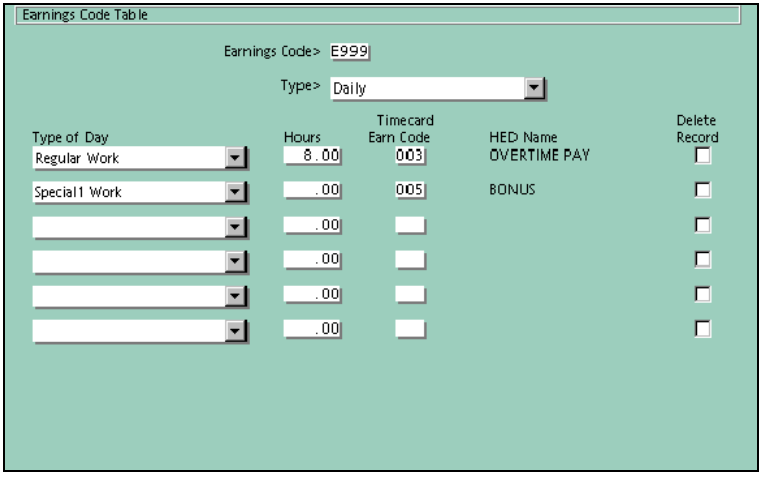
Calendar Routine 99 does not list 01-02-1998 as a holiday.

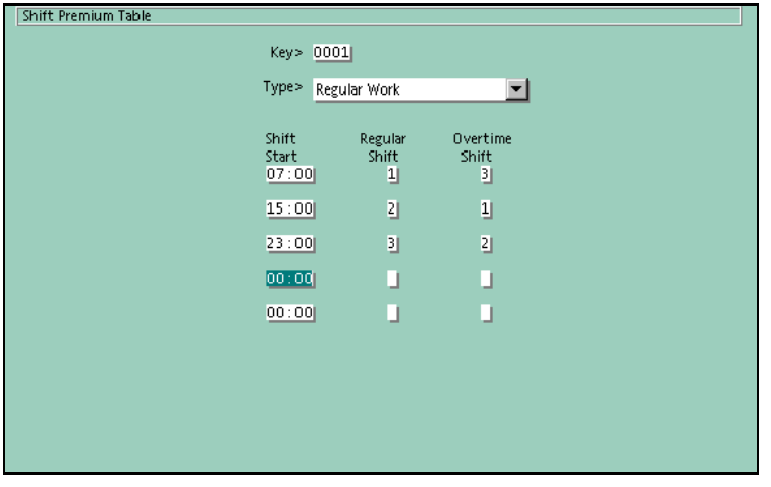


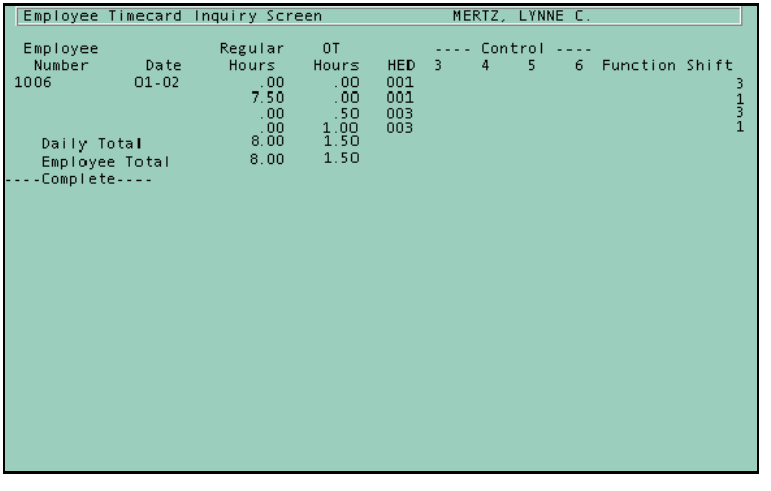
The Type of Day form data for Calendar Routine 99 is used.



Friday is a Regular Work (1) day. 8.00 hours are applied to the default, Regular Pay HED (001); all hours exceeding 8.00 are applied the Overtime HED 003.







As a result of the use of the Shift Premium table, the employee's time (clock transaction (ring) times 06:25 - Clock Start, 06:30 rounded time - and 16:00 Clock End) is divided into intervals. Time Entry Validation/Creation form generates four time entries. Overtime is calculated after eight hours has elapsed (at 14:30).

The following table illustrates how the shift codes are populated to the time entries:

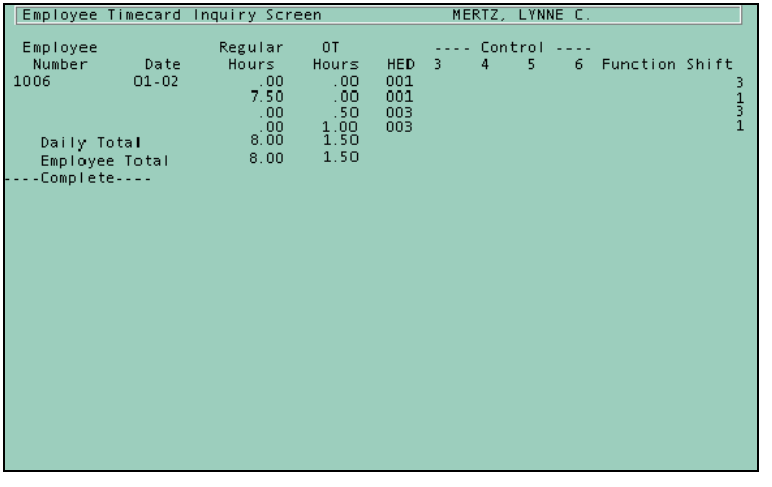
Employee Time Interval	Shift Premium Table Interval Used	Time Entry Hours	Type of Pay (Regular or Overtime)	Time Entry Shift Code
06:30 -07:00	23:00 - 07:00	.50	Regular (HED 001)	3

07:00 -14:30	07:00 - 15:00	7.50	Regular (HED 001)	1
14:30 -15:00	07:00 - 15:00	.50	Overtime (HED 003)	3
15:00 -16:00	15:00 - 23:00	1.00	Overtime (HED 003)	1

Tracking Shift Differential By HED Number

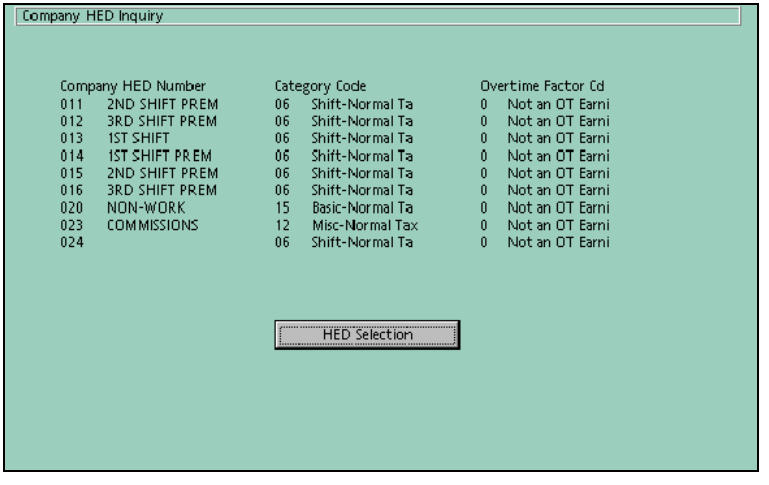
The Shift Premium Translation program allows you to generate separate time entries for tracking shift premium.

A single Time Entry containing a one position shift code is translated into two time entries: one for the HED and hours originally generated by Time Entry Validation/Creation form (TMCARD) and a separate one for a Shift Premium HED. The number of hours is the same on both time entries.



The HED Number is determined by the order of Shift Premium HEDs defined on the Company Earnings forms.

Shift Premium HEDs are those containing Category Code Shift-Normal Tax (06). The lowest numbered Shift HED (for example 014) is tied to the lowest shift code (for example 1). The second lowest numbered Shift HED (for example 015) is tied to the second lowest shift code, and so forth.



In this example, four time entries are translated into eight time entries. The original time entries are regenerated without the shift code. Additional time entries are generated with a shift premium HED Number.

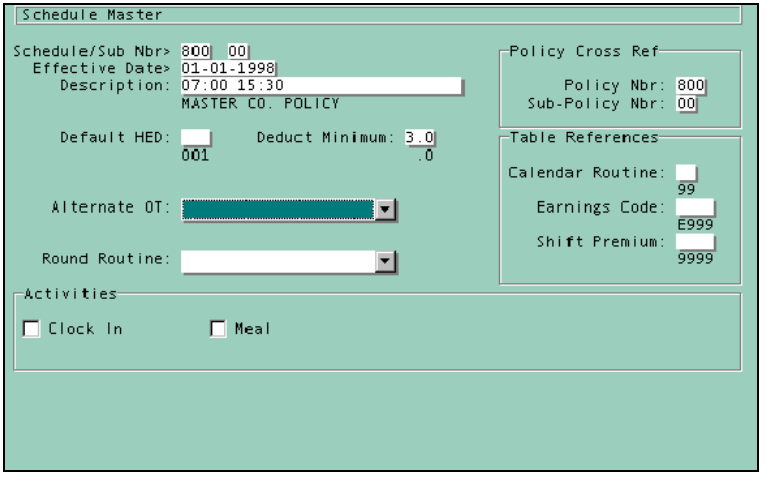
The program is executed in batch. The input file (FILE05) is the extract file of time entries. The output file (FILE10) is the file of regenerated and additional time entries

```
121006      000050                  0010102
  121006      000050                  0160102
121006      000750                  0010102
121006      000750                  0140102
121006                      0050    0030102
121006      000050                  0160102
121006                      0100    0030102
121006      000100                  0140102
```

Using the Standard Rounding Feature

This example shows the how Time and Attendance Administration uses the Standard Round Routine.

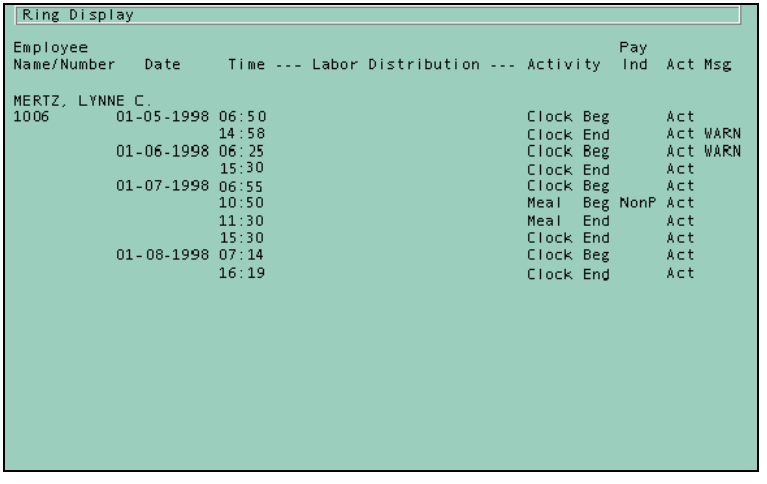
Assume Lynne C. Mertz is tied to schedule 800-00 (07:00 - 15:30), which uses standard rounding.



Her schedule's activities are:

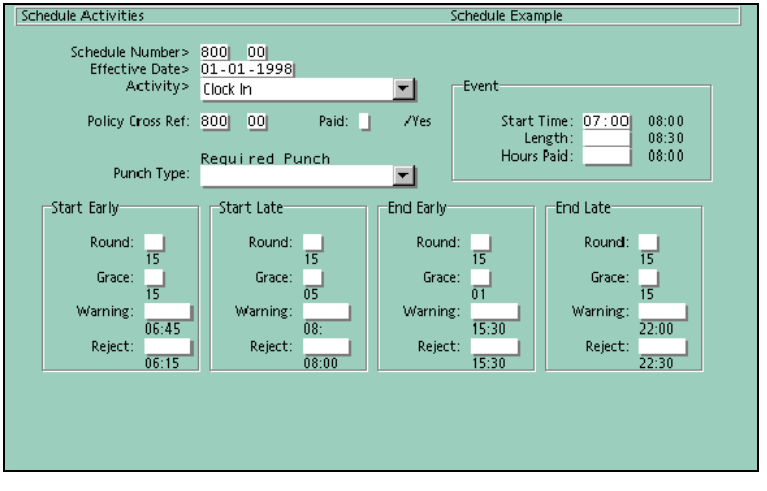
- Clock In (8) 07:00
- Meal Start (4) 11:00
- Meal End (5) 11:30
- Clock End (8) 15:30.

She left early on January 5th (32 minutes), worked overtime on the 6th (clocked in 35 minutes early), left for lunch early on the 7th (02 minutes), and started late (19 minutes) and worked late (44 minutes) on the 8th.



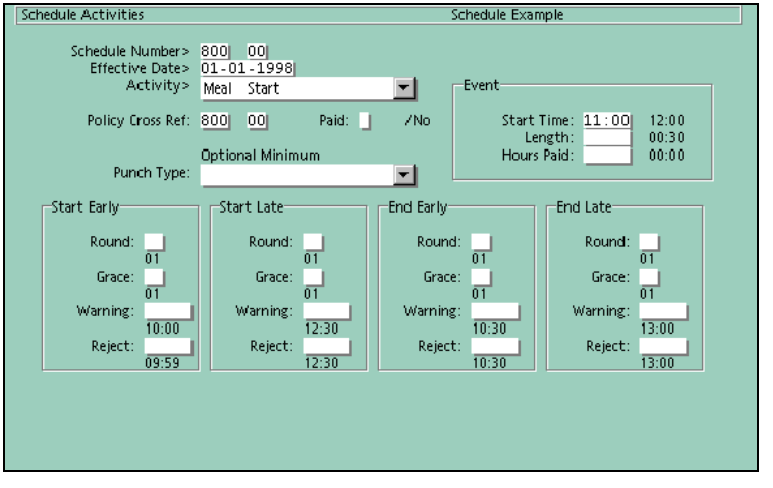
The following pages analyze how the Time Entry hours are calculated for each date using standard rounding for the schedule activities.

Activity - Clock In



- For starting early, all time worked before 07:00 is paid in 15 minute segments (Start Early Round 15). The employee is paid from 07:00, 06:45, 06:30, and so forth. An employee must work 15 minutes of a segment (Start Early Grace 15) to be paid for 15 minutes.
- For starting late, time is docked in 15 minute segments (Start Late Round is 15). The employee is paid from 07:00, 07:15, 07:30, and so forth. If the employee clocks in five minutes or later into a segment (Start Late Grace 05), she is paid from the next latest segment.
- For ending early, time is docked in 15 minute segments (End Early Round is 15). The employee is paid from 15:15, 15:00, 14:45, and so forth. If the employee clocks out one minute or earlier into a segment (End Early Grace 01), she is paid from the next earliest segment.
- For ending late, all time worked after 15:30 is paid in 15 minute segments (End Late Round 15). The employee is paid from 15:30, 15:45, 16:00, and so forth. An employee must work 15 minutes of a segment (Start Early Grace 15) to be paid for 15 minutes.

Activity - Meal Start

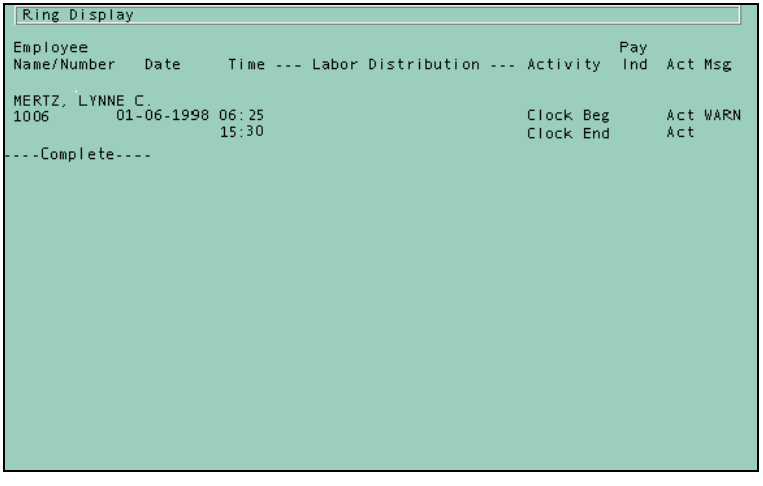


- For starting meals early, meal time taken before 11:00 is deducted in 06 minute segments (Start Early Round 06). The employee's meal deduction is from 10:54, 10:48, 10:42, and so forth. An employee whose Meal Start (4) is at least 01 minute into a segment (Start Early Grace 01) (for example 10:52) will have an additional 06 minutes of time deducted for the meal (for example 10:48) to determine actual rounded time.
- For starting meals late, the meal deduction actual rounded time is determined in 01 minute segments (Start Late Round 01). The employee's meal deduction actual rounded time is from 11:01, 11:02, 11:03, and so forth. If the employee's Meal Start (4) is 01 minute into a segment (Start Early Grace 01) (for example 11:02), the employee's meal deduction actual rounded time will be from that time/segment (11:02).
- For ending meals early, the meal deduction actual rounded time is determined in 01 minute segments (End Early Round 01). The employee's meal deduction actual rounded time is from 11:29, 11:28, 11:27, and so forth. If the employee's Meal End (5) is 01

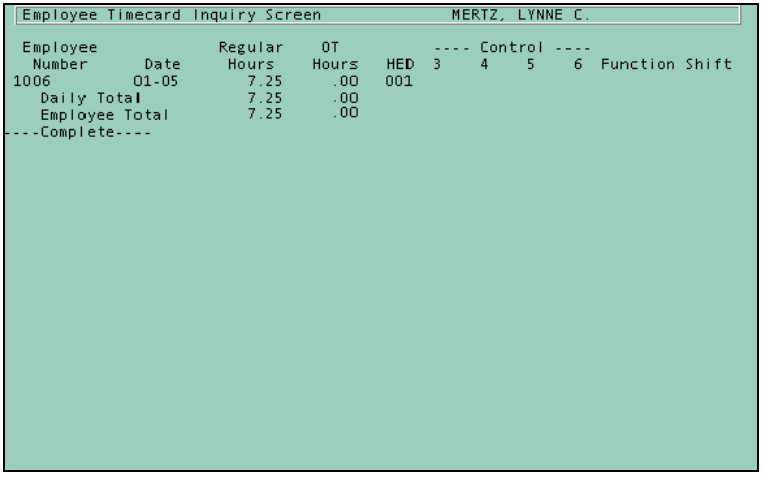
minute into a segment (End Early Grace 01) (for example 11:27), the employee's meal deduction actual rounded time will be from that time/segment (11:27).

- For ending meals late, meal time taken after 11:30 is deducted in 06 minute segments (Start Early Round 06). The employee's meal deduction is from 11:36, 11:42, 11:48, and so forth. An employee whose Meal End (5) is at least 01 minute (Start Early Grace 01) into a segment (for example 11:39) will have an additional 06 minutes of time deducted for the meal (11:42) to determine actual rounded time.

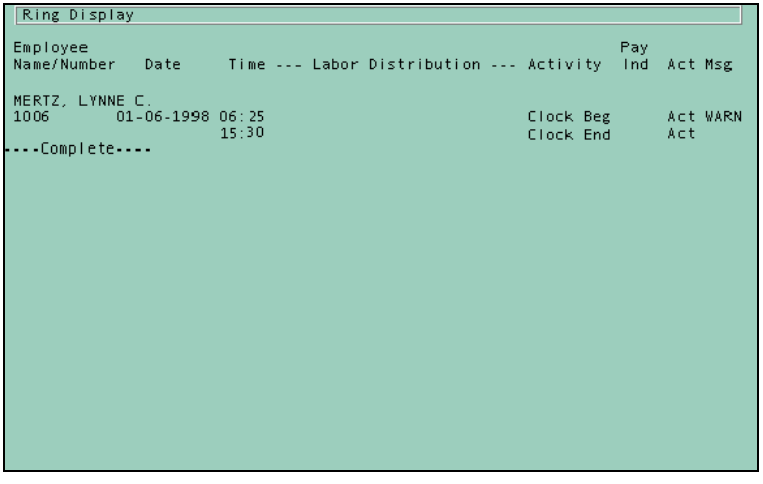
For 01-05-1998, Lynne's 06:50 clock transactions (ring) is rounded to 07:00. Her 14:58 clock transaction (ring) is rounded to 14:45.



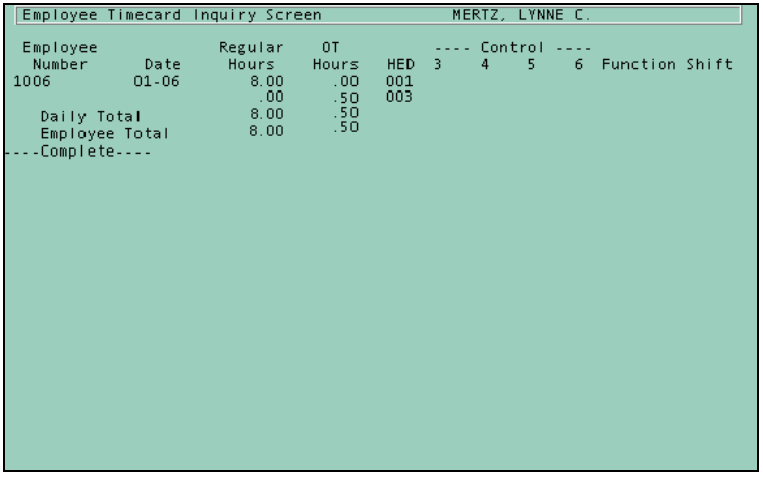
Rounded time is 7.75 hours (07:00-14:45). Her schedule's meal activity deducts a minimum of .50 hours for meal (Punch Type Optional Minimum (OM)). She is paid for 7.25 hours.



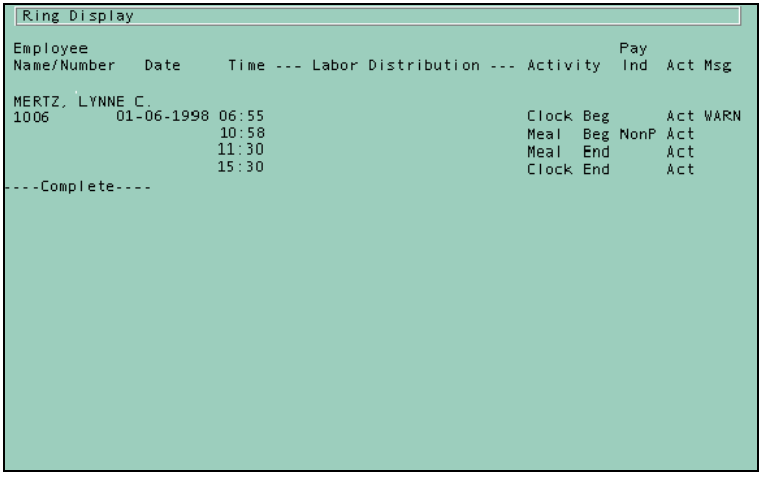
For 01-06-1998, Lynne's 06:25 clock transaction (ring) is rounded to 06:30. Her 15:30 clock transaction (ring) is rounded to 15:30. Rounded time is 9.00 hours (06:30-15:30).



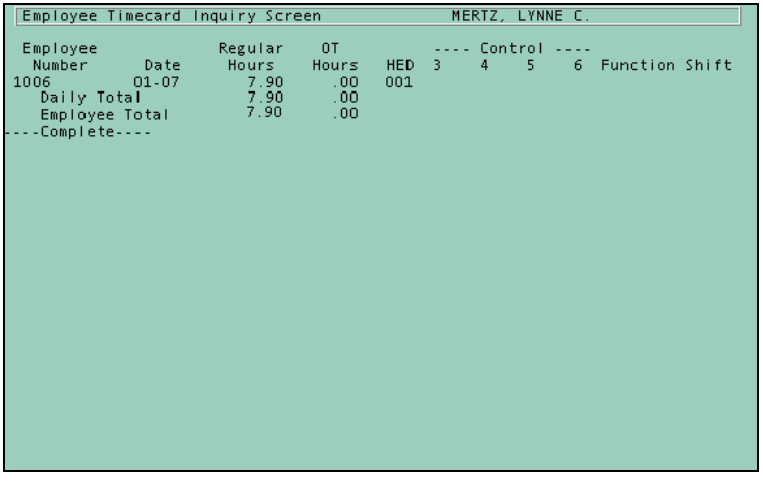
Her schedule's meal activity deducts a minimum of .50 hours for meal (Punch Type Optional Minimum (OM)). She is paid for 8.50 hours. Using an Earnings Code table where overtime is calculated after 8.00 hours, she is paid for 8.00 hours of Regular Pay (HED 001) and .50 hours of overtime (HED 003).



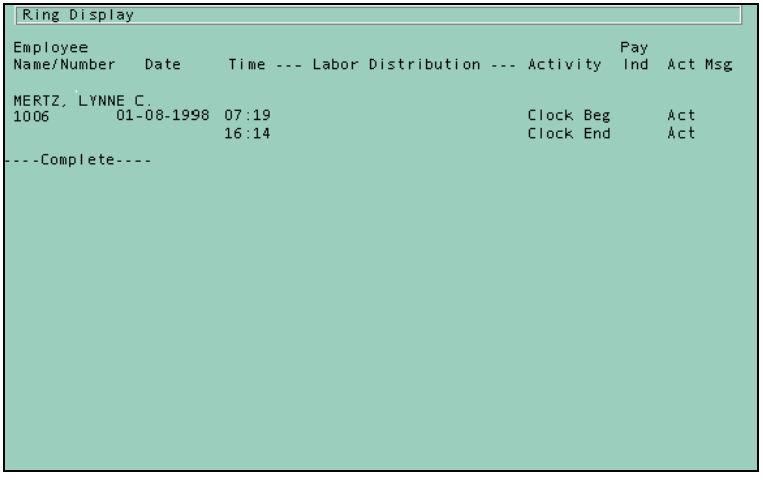
For 01-07-1998, Lynne's 06:55 clock transaction (ring) is rounded to 07:00. Her 10:58 Meal Start (4) clock transaction (ring) is rounded to 10:54. Her 11:30 Meal End (5) clock transaction (ring) is rounded to 11:30. Her 15:30 clock transaction (ring) is rounded to 15:30.



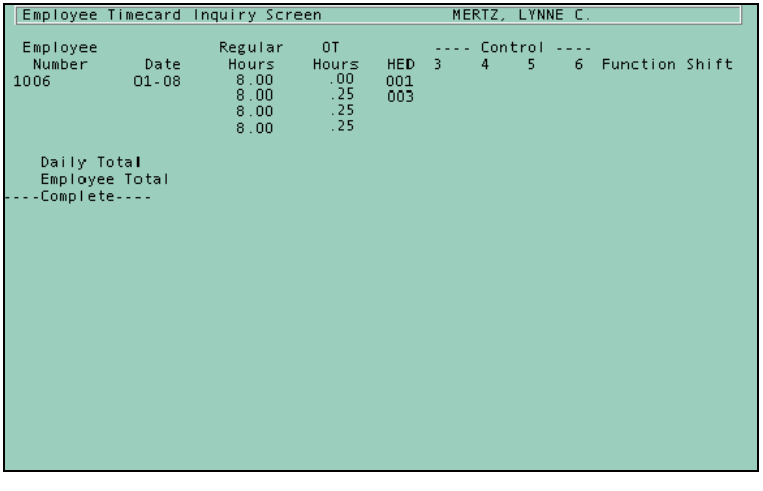
Rounded time is 8.50 hours (07:00 - 15:30). Her schedule's meal activity deducts the larger of a minimum of .50 hours or actual rounded time (.60 hours: 10:54 to 11:30) (Punch Type Optional Minimum (OM)). She is paid for 7.90 hours (8.50 minus .60 equals 7.90).



For 01-08-1998, Lynne's 07:19 clock transaction (ring) is rounded to 07:15. Her 16:14 clock transaction (ring) is rounded to 16:00. Rounded time is 8.75 hours (07:15 to 16:00).

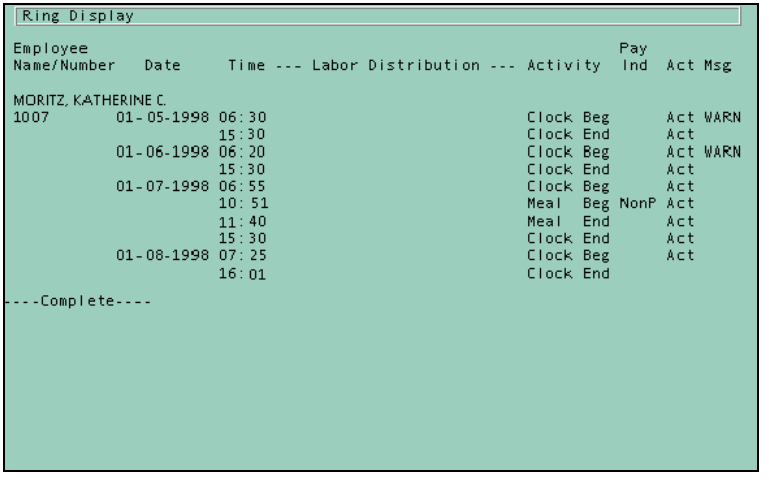


Her schedule's meal activity deducts a minimum of .50 hours for meal (Punch Type Optional Minimum (OM)). She is paid for 8.25 hours. Using an Earnings Code table (EC-SCR) where overtime is calculated after 8.00 hours, she is paid for 8.00 hours of Regular Pay (HED 001) and .25 hours of overtime (HED 003).

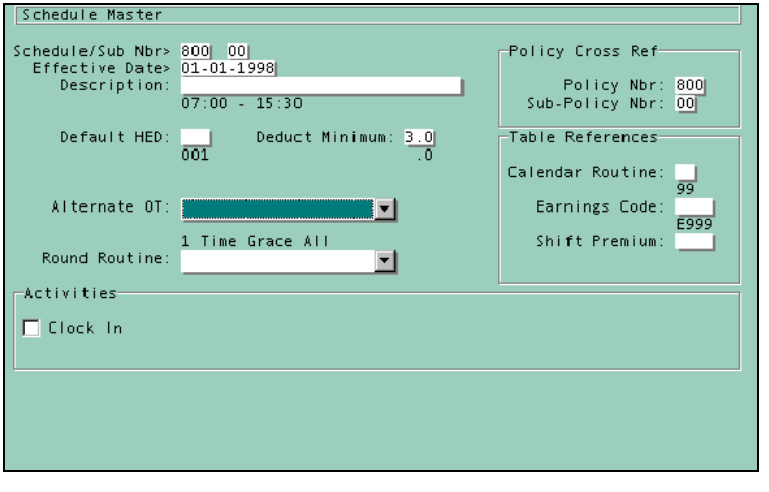


Using the Round Routine

This example shows the various forms which are used by Time and Attendance Administration to track shift differentials by shift code.



In this example Katherine C. Moritz is assigned to Schedule 800-00 (07:00 - 15:30), which uses Round Routine 1 Time Grace All (1).



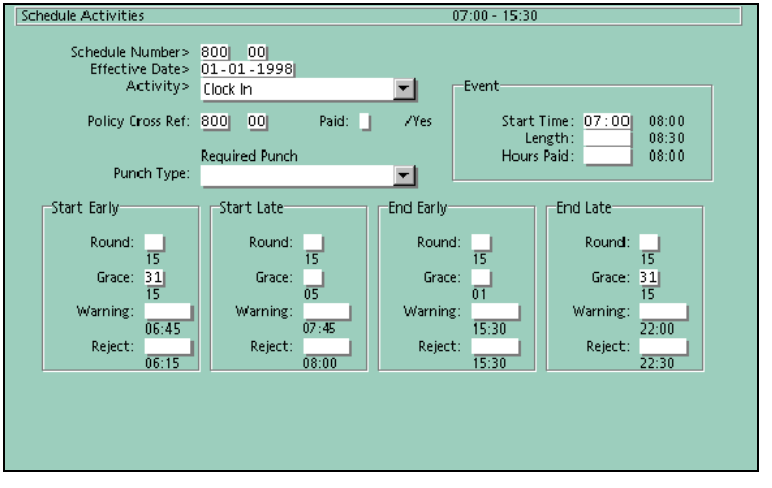
Her schedule's activities are:

- Clock In (8) 07:00
- Meal Start (4) 11:00
- Meal End (5) 11:30
- Clock End (8) 15:30.

She clocked in early on January 5th (06:30, 30 minutes) and January 6th (06:20, 40 minutes). She left for lunch early (10:51, 09 minutes) and returned from lunch late (11:40, 10 minutes) on the January 7th. She also started late (07:25, 25 minutes) and worked late (16:01, 31 minutes) on the 8th.

The following pages analyze how the time entry hours are calculated for each date using Round Routine 1 Time Grace All (1) for the schedule activities.

Activity - Clock In

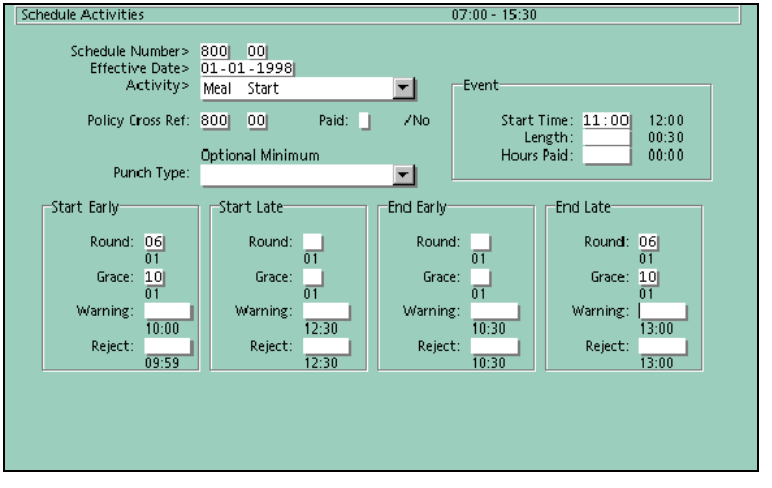


The Grace Period is in effect one time only for clock transactions (rings) for Start Early (31, from 06:30 to 07:00), Start Late (05, from 08:00 to 08:04), End Early (01, at 15:30), and End Late (31, from 15:30 - 16:00). Clock transactions outside of the Grace Periods are rounded to the nearest round interval.

- For starting early, a clock transaction from 06:30 to 07:00 is paid from 07:00 (Start Early Grace 31). For a clock transaction before 06:30, the employee is paid from the nearest 15 minute interval (Start Early Round 15 - 06:30, 06:15, 06:00, and so forth).
- For starting late, a clock transaction from 07:00 to 07:04 is paid from 07:00 (Start Late Grace 05). For a clock transaction after 07:04, the employee is paid from the nearest 15-minute interval (Start Late Round 15 - 07:00, 07:15, 07:30, 07:45, and so forth).
- For ending early, a clock transaction at 15:30 is paid up to 15:30 (End Early Grace 01). For a clock transaction before 15:30, the employee is paid up to the nearest 15-minute interval (End Early Round 15 - 15:30, 15:15, 15:00, and so forth).
- For ending late, a clock transaction from 15:30 to 16:00 is paid up to 15:30 (Start Early Grace 31). For a clock transaction after 16:00, the employee is paid up to the nearest 15-minute interval (End Late Round 15 - 16:00, 16:15, 16:30, and so forth).

Note: The Round Routine/One Time Grace Period is not in effect for any clock transactions (rings) added or changed on the Error Correction form (TAESCR). In this case, clock transactions (rings) are rounded to the nearest Round interval.

Activity - Meal Start



The Meal Grace periods are in effect one time only for clock transactions (rings) for Start Early (10, from 10:51 to 11:00), Start Late (01, at 11:00), End Early (01, at 11:30), and End Late (10, from 11:30 to 11:39). Clock transactions outside of the Grace Periods are rounded to the nearest round interval.

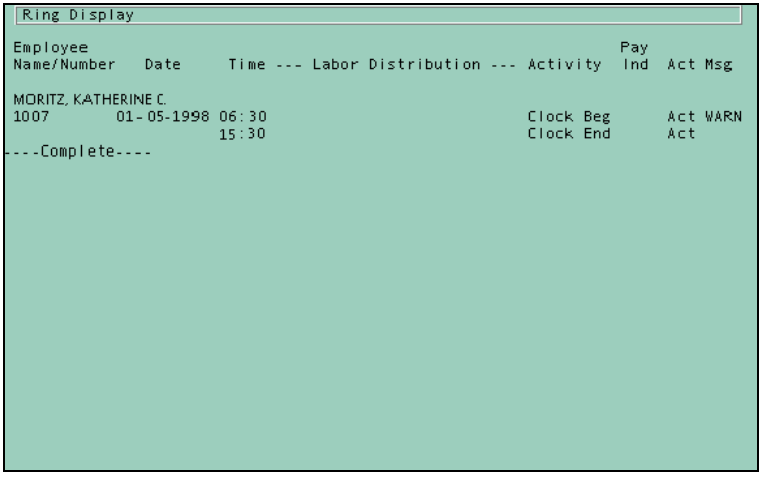
- For starting meals early, before 11:00, meal start (4) actual rounded time is determined in 06-minute segments (Start Early Round 06). A meal start (4) clock transaction from 10:51 to 11:00 (Start Early Grace 10) results in a meal deduction starting from 11:00. A meal start (4) clock transaction from before 10:51 results in a meal deduction starting from the nearest six minute segment (10:48, 10:42, 10:36, 10:30, and so forth).
- For starting meals late, after 11:00, the meal start (4) actual rounded time is determined in 01-minute segments (Start Late Round 01). A meal start (4) clock transaction at 11:00 (Start Early Grace 01) results in a meal deduction starting from 11:00. A meal

start (4) clock transaction after 11:00 results in a meal deduction starting from the nearest one minute segment (11:00, 11:01, 11:02, 11:03, and so forth).

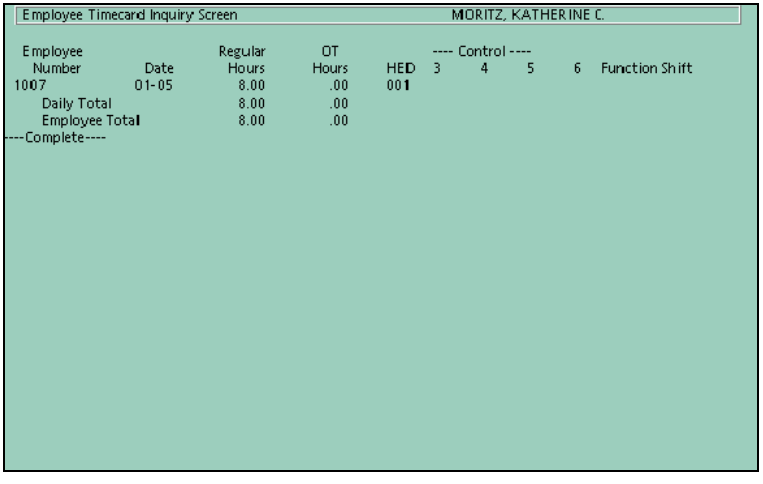
- For ending meals early, before 11:30, the meal end (5) actual rounded time is determined in 01-minute segments (End Early Round 01). A meal end (5) clock transaction at 11:30 (Start Early Grace 01) results in a meal deduction ending at 11:30. A meal end (5) clock transaction before11:30 results in a meal deduction ending at the nearest one minute segment (11:29, 11:28, 11:27, 11:26, and so forth).
- For ending meals late, after 11:30, the meal end (5) actual rounded time is determined in 06-minute segments (Start Early Round 06). A meal end (5) clock transaction from 11:30 to 11:39 (Start Early Grace 10) results in a meal deduction ending at 11:30. A meal end (5) clock transaction after 11:39 results in a meal deduction ending at the nearest six minute segment (11:42, 11:48, 11:54, 12:00, and so forth).

Note: The Round Routine/One Time Grace Period is not in effect for any clock transactions added or changed on the Error Correction form (TAESCR). In this case, clock transactions are rounded to the nearest Round interval.

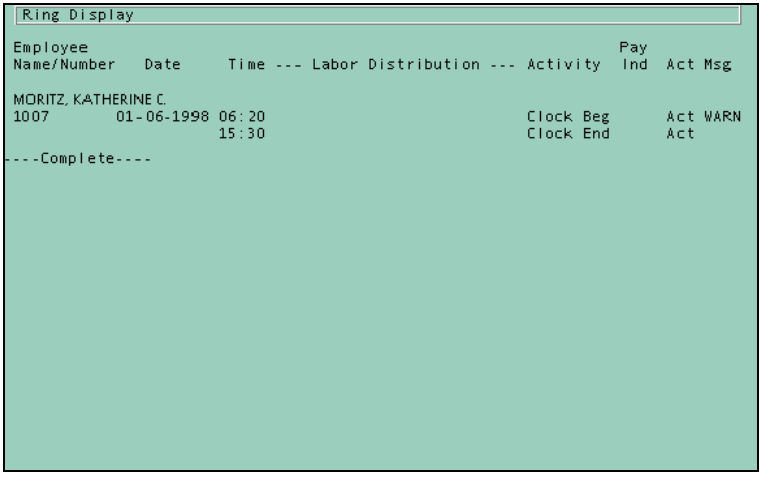
For 01-05-1998, Katherine's 06:30 clock transaction (ring) is rounded to 07:00 (Start Early Grace 31, 06:30 to 07:00). Her 15:30 clock transaction (ring) is rounded to 15:30. Rounded time is 8.50 hours (07:00-15:30).



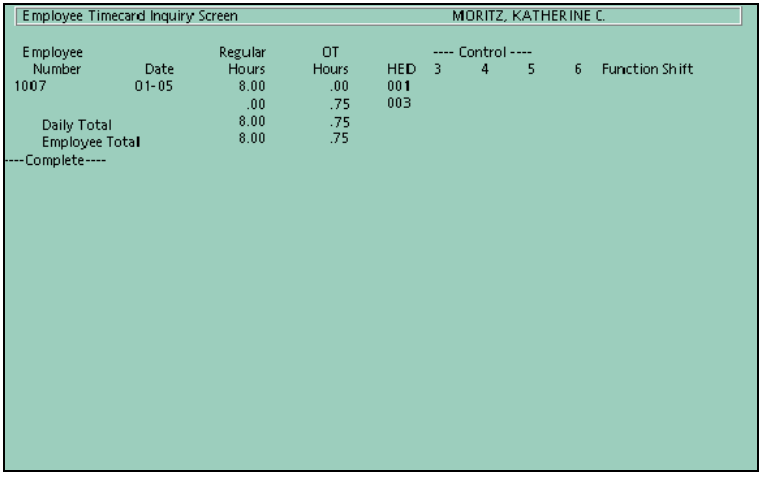
Her schedule's meal activity deducts a minimum of .50 hours for meal (Punch Type Optional Minimum (OM)). She is paid for 8.00 hours.



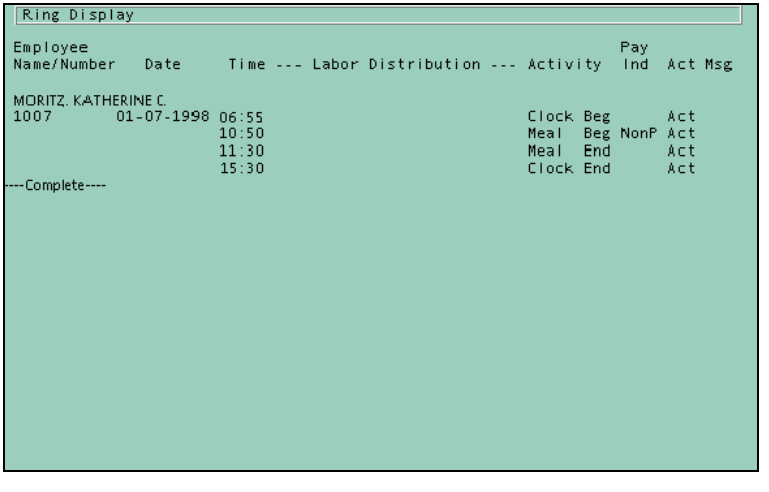
For 01-06-1998, Katherine's 06:20 clock transaction (ring) is rounded to 06:15 (Start Early Grace 31, 06:30 - 07:00). Her 15:30 clock transaction (ring) is rounded to 15:30. Rounded time is 9.25 hours (06:15 -15:30).



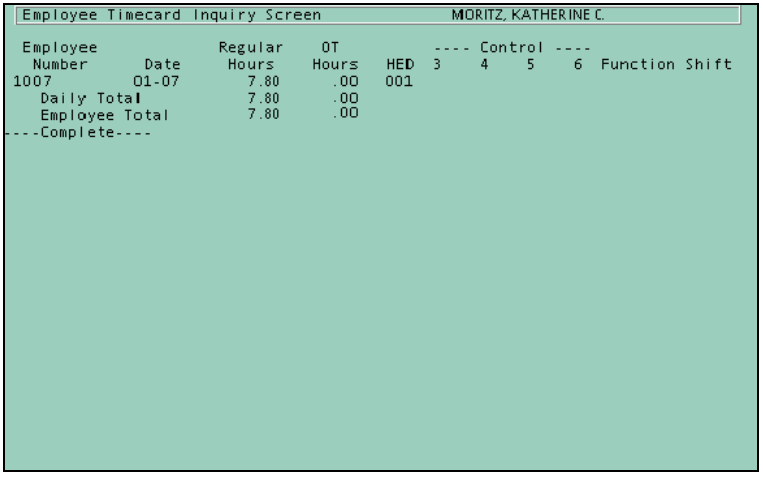
Her schedule's meal activity deducts a minimum of .50 hours for meal (Punch Type Optional Minimum (OM)). She is paid for 8.75 hours. Using an Earnings Code table where overtime is calculated after 8.00 hours, she is paid for 8.00 hours of Regular Pay (HED 001) and .75 hours of overtime (HED 003).



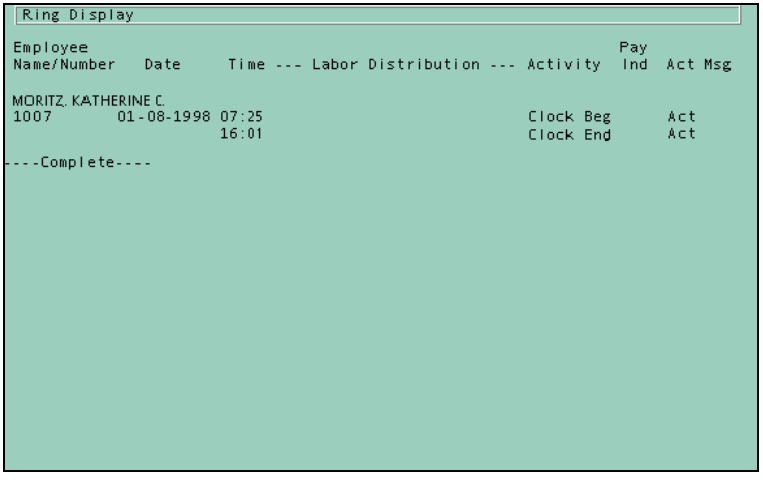
For 01-07-1998, Katherine's 06:55 clock transaction (ring) is rounded to 07:00 (Start Early Grace 31, 06:30 to 07:00). Her 10:51 Meal Start (4) clock transaction (ring) is rounded to 11:00 (Start Early Grace 10, 11:00 to 10:51). Her 11:40 Meal End (5) clock transaction (ring) is rounded to 11:42 (End Late Grace (10, 11:30 - 11:39). Her 15:30 clock transaction (ring) is rounded to 15:30. Rounded time is 8.50 hours (07:00 - 15:30).



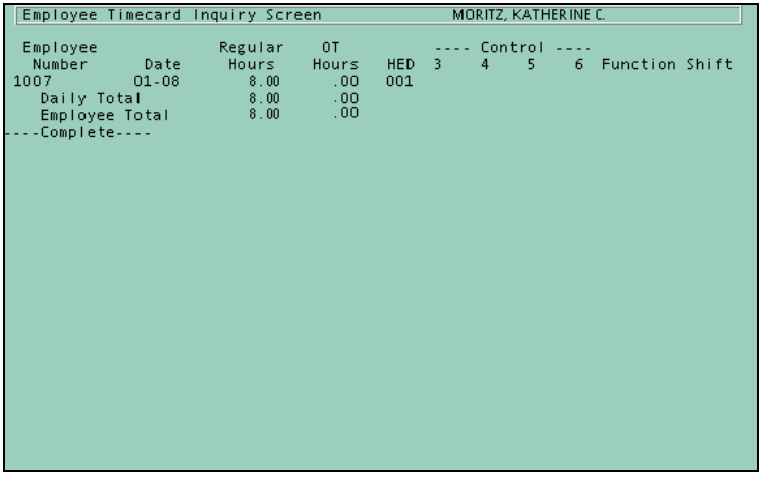
Her schedule's meal activity deducts the larger of a minimum of .50 hours or actual rounded time (.70 hours: 11:00 to 11:42) (Punch Type Optional Minimum (OM)). She is paid for 7.80 hours (8.50 minus .70 equals 7.80).



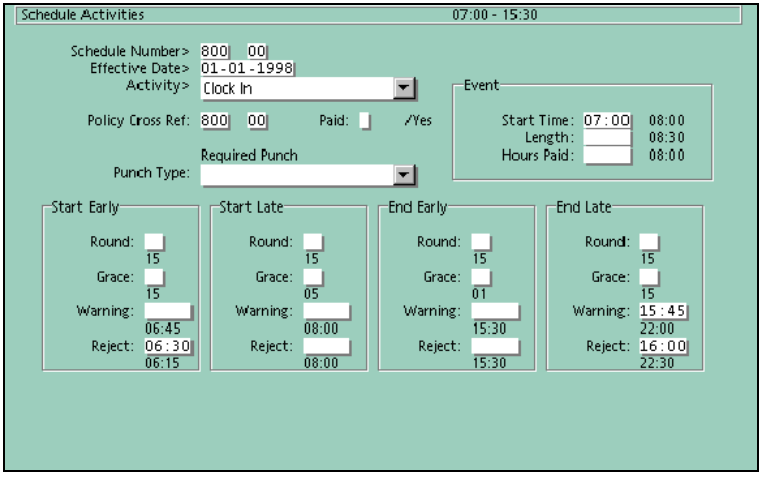
For 01-08-1998, Katherine's 07:25 clock transaction (ring) is rounded to 07:30 (Start Late Grace 05, 07:00 - 07:04). Her 16:01 clock transaction (ring) is rounded to 16:00 (End Late Grace 31, 15:30 - 16:00). Rounded time is 8.50 hours (07:30 to 16:00).

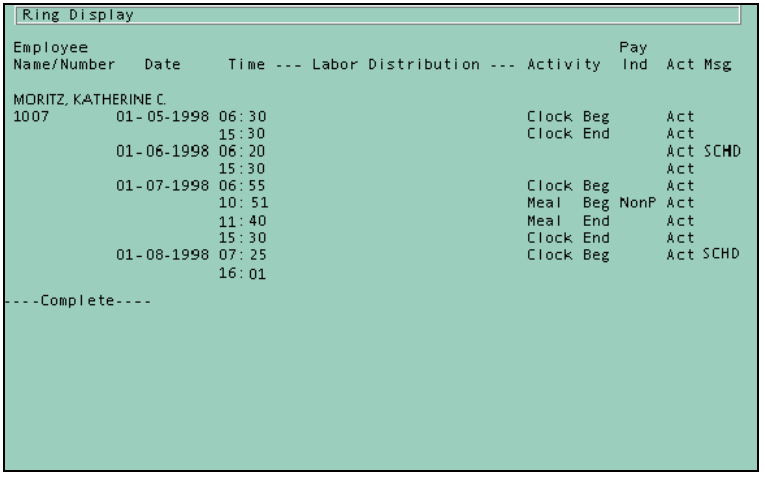


Her schedule's meal activity deducts a minimum of .50 hours for meal (Punch Type Optional Minimum (OM)). She is paid for 8.00 hours.



A common application of the Round Routine is to specify schedule Reject times at the point at which Grace periods end. For example Start Early Reject is set to 06:30 and End Late Reject is set to 16:00 to prevent automatic overtime calculations.





Ring Display

Employee Name/Number	Date	Time	Labor Distribution	Activity	Pay Ind	Act	Msg
MORITZ, KATHERINE C.							
1007	01-05-1998	06:30		Clock Beg		Act	
		15:30		Clock End		Act	
	01-06-1998	06:20				Act	SCHD
		15:30				Act	
	01-07-1998	06:55		Clock Beg		Act	
		10:51		Meal	Beg NonP	Act	
		11:40		Meal	End	Act	
		15:30		Clock End		Act	
	01-08-1998	07:25		Clock Beg		Act	SCHD
		16:01					

----Complete----

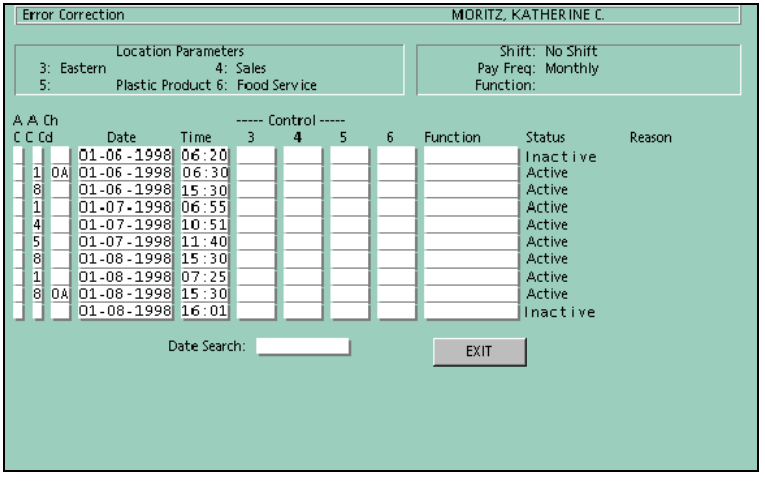
The Error Correction form (TAESCR) entries determine the time entry hours calculations for dates containing schedule errors.

The Round Routine/One Time Grace Period is not in effect for clock transactions (rings) added or changed (for example 01-06-1998 at 06:30) on the Error Correction form (TAESCR).

For 01-06-1998, Katherine's 06:30 clock transaction (ring) is rounded to 06:30 (round to the nearest 15-minute segment).

Her 15:30 clock transaction (ring) is rounded to 15:30. Rounded time is 9.00 hours (06:30 - 15:30).

Her schedule's meal activity deducts a minimum of .50 hours for meal (Punch Type Optional Minimum (OM)). She is paid for 8.50 hours.



Error Correction — MORITZ, KATHERINE C.

Location Parameters
3: Eastern 4: Sales
5: Plastic Product 6: Food Service

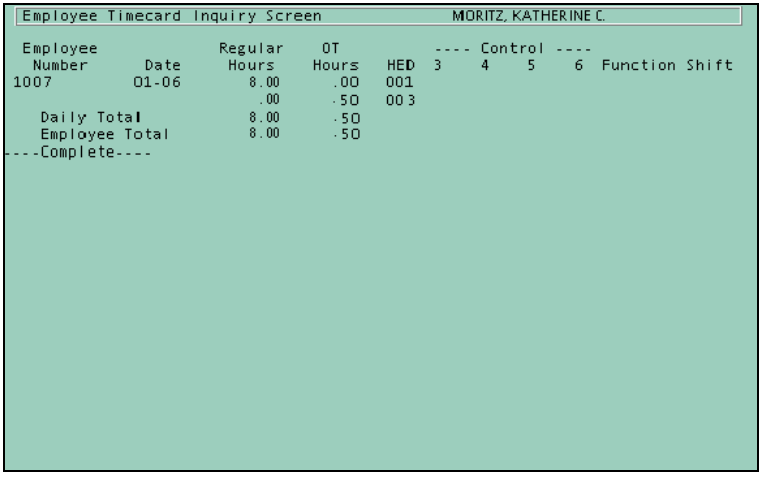
Shift: No Shift
Pay Freq: Monthly
Function:

A C	A Cd	Ch	Date	Time	Control 3	Control 4	Control 5	Control 6	Function	Status	Reason
			01-06-1998	06:20						Inactive	
	1	OA	01-06-1998	06:30						Active	
	8		01-06-1998	15:30						Active	
	1		01-07-1998	06:55						Active	
	4		01-07-1998	10:51						Active	
	5		01-07-1998	11:40						Active	
	8		01-08-1998	15:30						Active	
	1		01-08-1998	07:25						Active	
	8	OA	01-08-1998	15:30						Active	
			01-08-1998	16:01						Inactive	

Date Search:

EXIT

Using an Earnings Code table where overtime is calculated after 8.00 hours, she is paid for 8.00 hours of Regular Pay (HED 001) and .50 hours of overtime (HED 003).



Synchronizing Employee Badge Assignment Alternate Key Records

Employee badge assignment alternate key (QTN) records are created by the Badge Number Assignments form, along with Employee Database badge assignment (LTB) segments.

QTN records are stored on the System Control Repository.

The information on these records includes a badge number, organization, and employee number.

The Upload Rings program reads the badge number on each clock transaction (ring), finds the QTN record containing that same badge number, and ties the clock transaction to the employee number on that same QTN record.

For example, in the following display, badge number 1111 is tied to employee 1001 in Organization 999999.

```
0...+...1...+...2...+...3...+...4...+...5...+...6...+...7...+...
QTN999999      1111   99999999M1001      980104
QTN999999    001001   99999999M1001      980104
QTN999999    001002   99999999M1002      971130971201
QTN999999    001004   99999999M1004      980101
QTN999999   1001002   99999999M1002      971201971204
QTN999999   2001002   99999999M1002      971204971215
QTN999999   3001002   99999999M1002      971215971216
R 01-RQ11                    0104  REPORT CODE         31
R 01-RQ12CONTROL-1             02  CONTROL-1           2
R 01-RQ13CONTROL-2             04  CONTROL-2          0
R 01-RQ14W6-02-128             0213W6-02-128
R 01-RR00000
R 01-RR10001    001 0 0  N 0300
R 01-RR21055  EE0-1 REPORT
R 01-RR22052APPLICANTS/SINGLE JOB
R 01-RR23032TOTAL   TOTAL   TOTAL    MALE   MALE
R 01-RR23072MALE    MALE    MALE   FEMALE  FEMALE
R 01-RR23111FEMALE  FEMALE  FEMALE
R 01-RR24029APPLICANTS  MALE  FEMALE   WHITE   BLACK
R 01-RR24072ASIAN  INDIAN  HISPAN   WHITE   BLACK
R 01-RR24112ASIAN  INDIAN  HISPAN
```

Occasionally, all QTN records are not synchronized with all employee badge assignment segments. To synchronize these records execute the following steps:

- Delete all QTN records for all Organizations (DEL-TN, batch only).
- Build QTN records for each Organization (KEY-TN, batch only).

To delete QTN records, create a jobstream JDEL-TN, as displayed below, and execute.

JDEL-TN

FILE01=FILE01

FILE02=FILE02

FILE03=DEL-TN03

FILE04=DEL-TN04

CBSVB

Sample FILE04:

```
         1         2         3         4         5         6
....5....0....5....0....5....0....5....0....5....0....5....0....
P QUERY J00100 W999999QUERY                           DEL-TN000001
P QUERY J00200           9999                 *
                         |                    |
                         2                    4
                         6                    7
```

To create QTN records, create a jobstream JKEY-TN, as displayed below, and execute. You must create two FILE04 control records for each Organization. The Organization is specified in positions 17-22.

JKEY-TN

FILE01=FILE01

FILE02=FILE02

FILE03=KEY-TN03

FILE04=KEY-TN04

CBSVB

Sample FILE04:

```
         1         2         3         4         5         6
....5....0....5....0....5....0....5....0....5....0....5....0....
P QUERY J00100 W010001QUERY                           KEY-TN000001
P QUERY J00200           9999                 *
P QUERY J00100 W010002QUERY                   *        KEY-TN000001
P QUERY J00200           9999                 *
                         |                    |
                         2                    4
                         6                    7
```

Determining Time Entry Dates for employees whose shift/schedule crosses midnight

The system default time for the end of a day is midnight. If your organization has shifts/schedules that cross midnight, you will need to modify the source code for the Time Entry Validation/Creation program (TMCARD).

Employees who start work prior to midnight will have all their time entries for their shift assigned to the date that they started the shift. To avoid this you need to make the following modification.

By removing the prescribed '@' signs you can modify the time entries so that they recorded the actual date.

For example, if you specify 22:00 to be the end of day, all employees scheduled to start after 22:00 will have the following day's date assigned to their time entries.

To make this modification complete the following two tasks:

Note: *On the Time Entry Validation/Creation form (TMCARD) and in the VALID subroutine, enter the time to be designated as end-of-day. The EVENT-START-TIME in VALID P430 must agree with line 18300 on the Time Entry Validation/Creation form.*

The EVENT-START-TIME is expressed in the programs in number of minutes. For example, 13:19 is the time 21:59. The modification is in effect for employees whose scheduled EVENT-START-TIME is later than 21:59 (10:59 p.m.).

Modify the EL Source for the Time Entry Validation/Creation form (TMCARD)

1. Access the Edit Utility form (EDIT)

Access this form by making the following selection from the navigator:

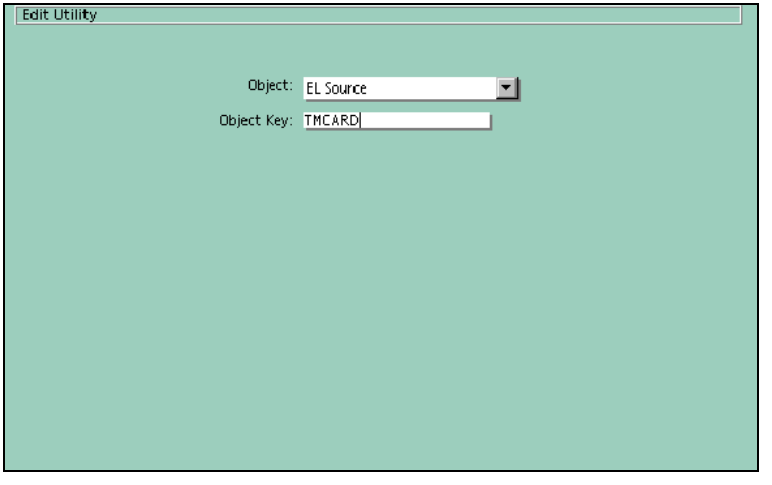
Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

2. Select an Object

Select the object 'EL Source'.

3. Select an Object Key

Select TMCARD to access the EL Source for the Time Entry Validation/Creation program



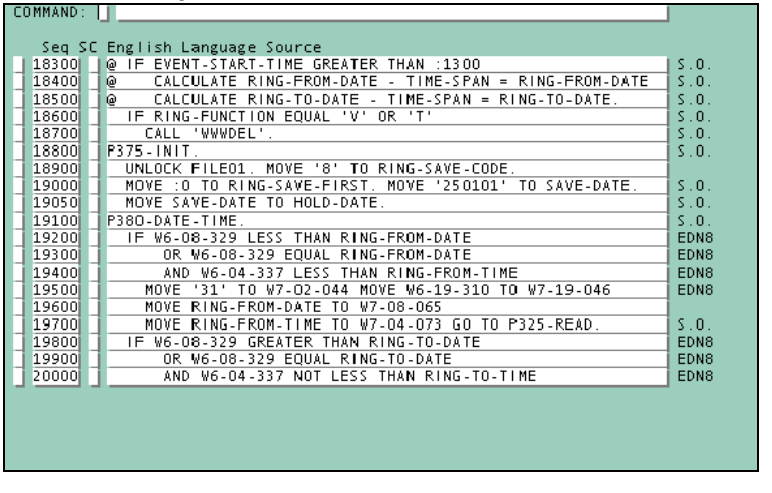
4. Click Save or press Enter

The EL Source for the Time Entry Validation/Creation program is shown.

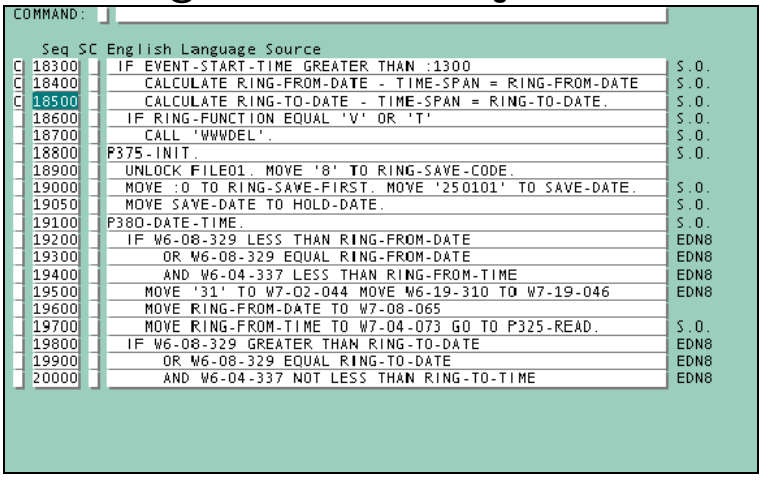
5. Move to the lines you need to modify

To view the lines to be modified, enter 'G' in the command text box and enter the number 18300.

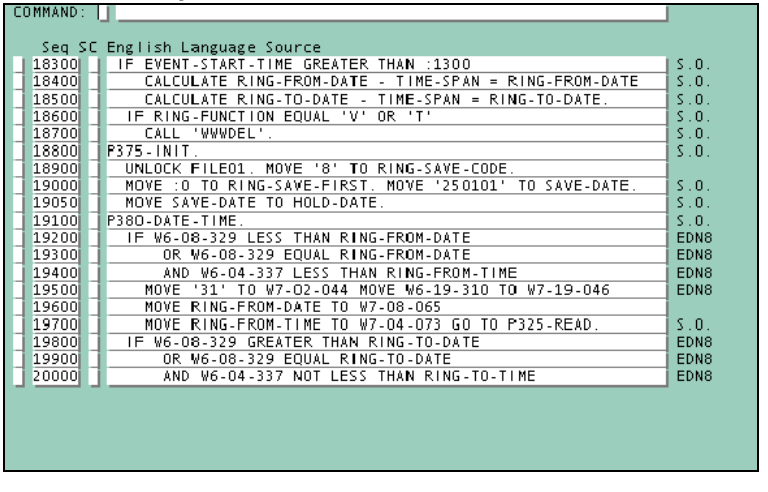
6. Click Save or press Enter



7. Remove the '@' from lines 18300 through 18500



8. Click Save or press Enter

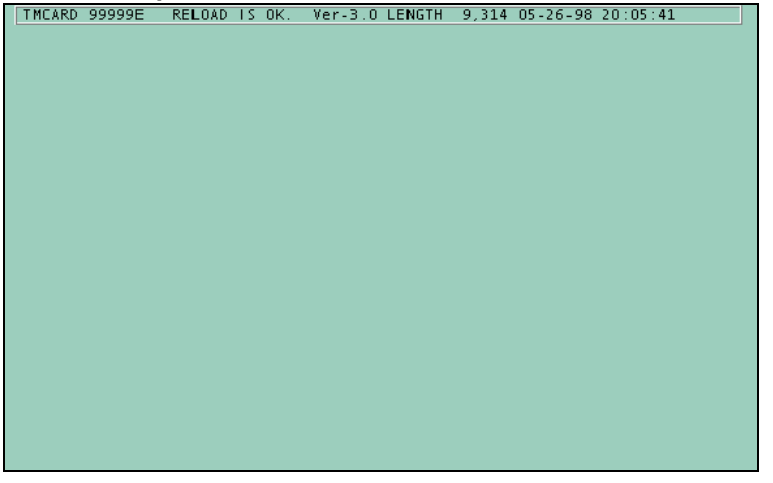


9. Access the Command Entry dialog box

10. Reload the program

Type 'RELOAD' in the Program text box and 'TMCARD' in the Key text box.

11. Click OK or press Enter



Modify the EL Source for the Time Entry Validation/Creation form

1. Access the Edit Utility form (EDIT)

Access this form by making the following selection from the navigator:

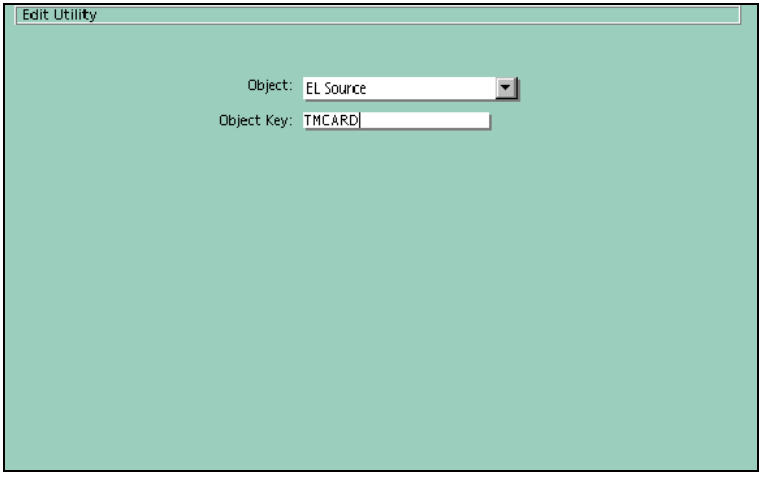
Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object

2. Select an Object

Select the object 'EL Source'.

3. Select an Object Key

Select TMCARD to access the EL Source for the Time Entry Validation/Creation program

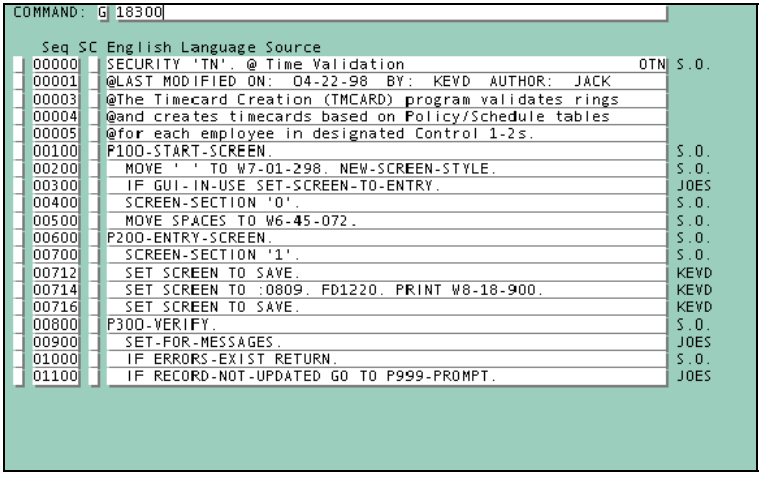


4. Click Save or press Enter

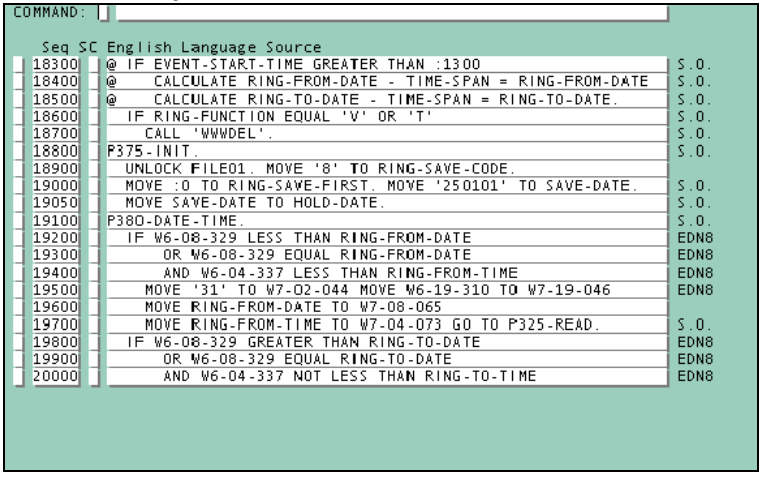
The EL Source for the Time Entry Validation/Creation program is shown.

5. Move to the lines you need to modify

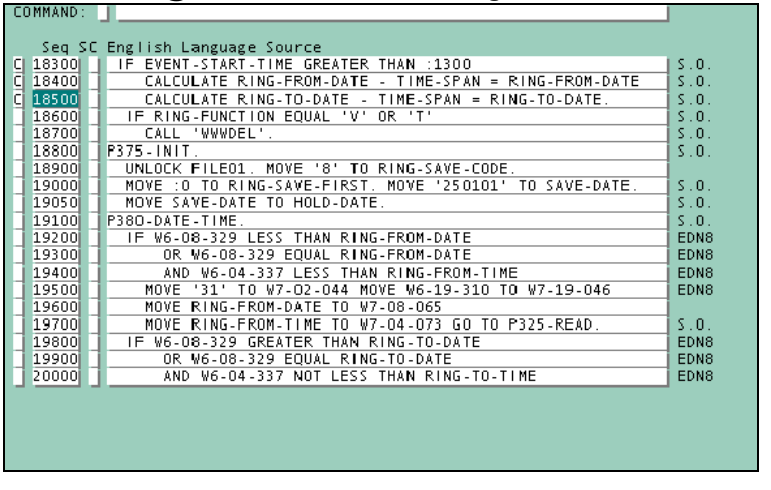
To view the lines to be modified, enter 'G' in the command text box and enter the number 18300.



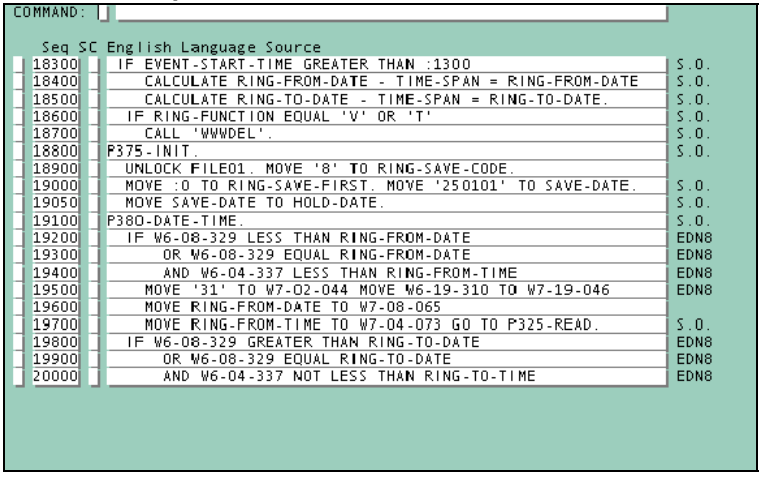
6. Click Save or press Enter



7. Remove the '@' from lines 18300 through 18500



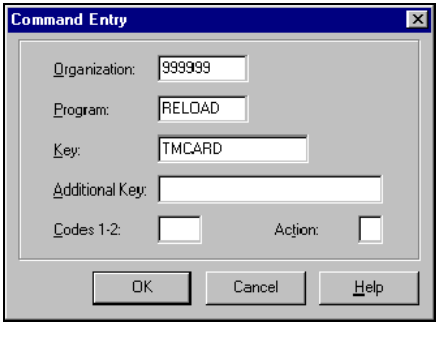
8. Click Save or press Enter



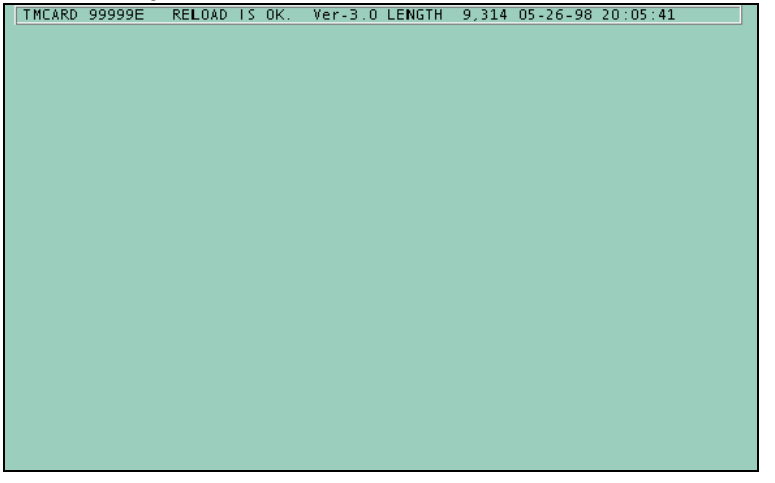
9. Access the Command Entry dialog box

10. Reload the program

Type 'RELOAD' in the Program text box and 'TMCARD' in the Key text box.



11. Click OK or press Enter



Modify the EL Source for the VALID program

1. Access the Edit Utility form (EDIT)

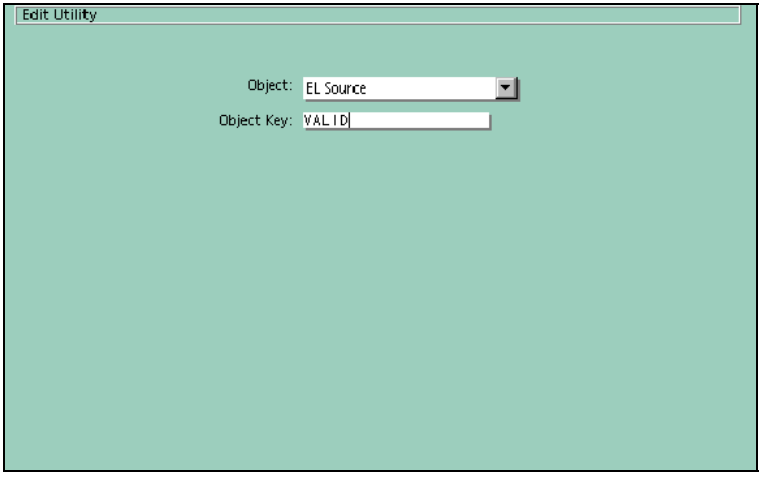
2. Select an Object

Select the object 'EL Source'.

3. Select an Object Key

Select VALID to access the EL Source VALID program

Component: Development Tools
Process: System Control Repository Utilities
Task: Edit Control Repository Object\

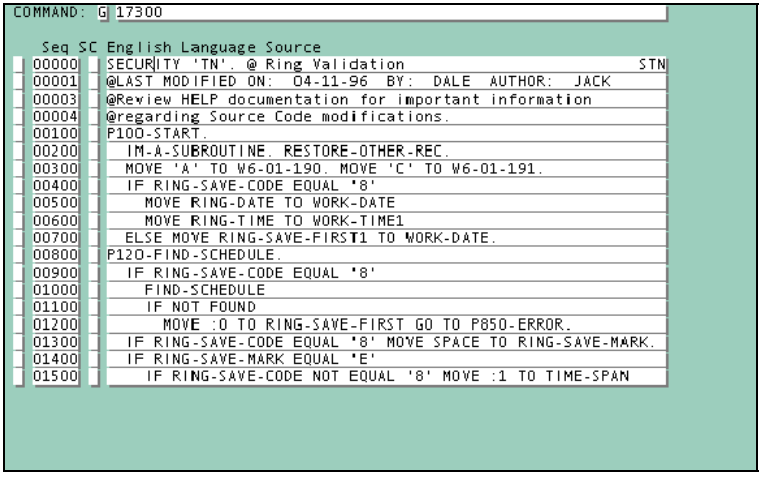


4. Click Save or press Enter

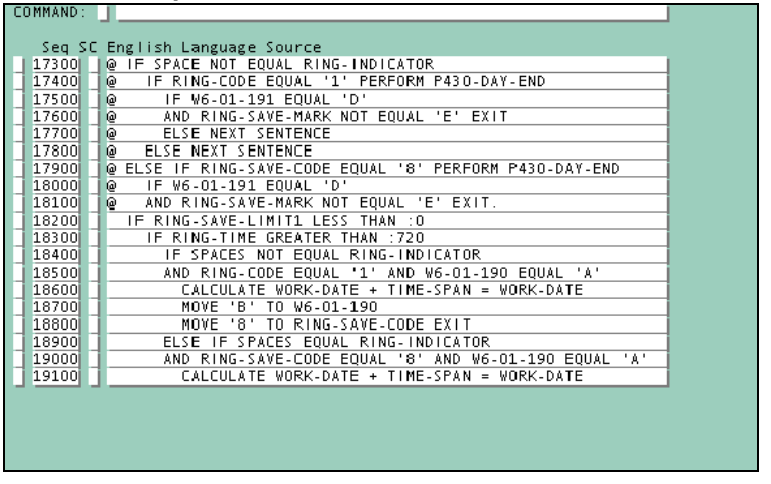
The EL Source for the Time Entry Validation/Creation program is shown.

5. Move to the lines you need to modify

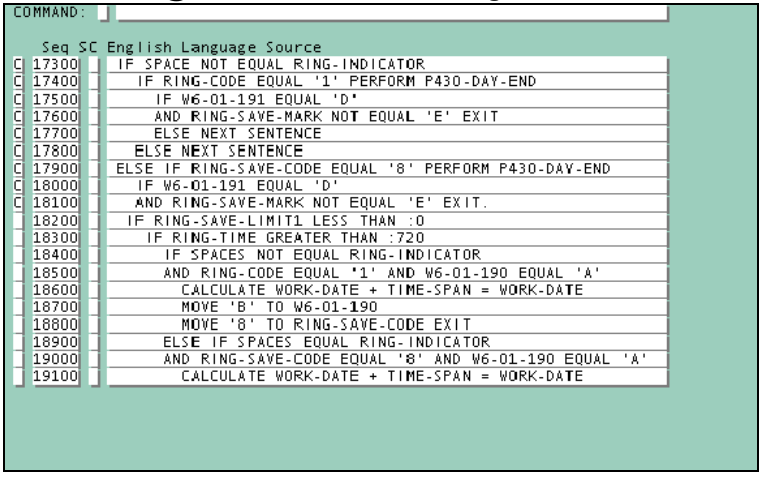
To view the lines to be modified, enter 'G' in the command text box and enter '17300'.



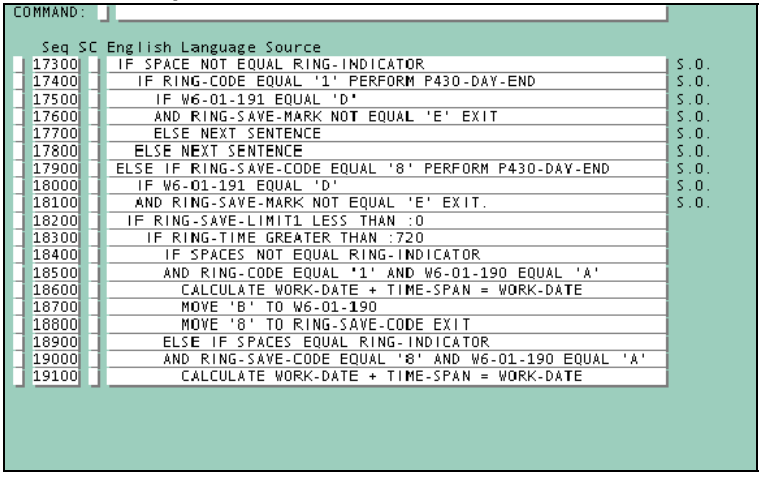
6. Click Save or press Enter



7. Remove the '@' from lines 17300 through 18100

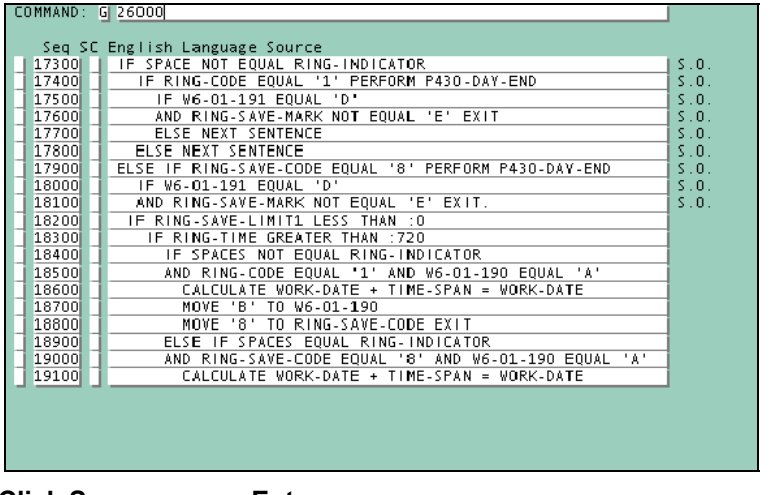


8. Click Save or press Enter



9. Move to the lines you need to modify

To view the next line to be modified, enter 'G' in the Command text box and enter '26000'.



10. Click Save or press Enter

11. Edit lines 26000 and 27000

Edit lines 26000 and 27000 to indicate what time should be considered End Of Day. This number is the number of minutes past midnight. For example: 1319 = 11:59 (21 x 60 = 1260 minutes, plus 59 minutes = 1319).

```
COMMAND:

   Seq SC English Language Source
 26000    IF EVENT-START-TIME GREATER THAN :1300
 26100      MOVE :1 TO TIME-SPAN
 26200      IF W6-01-190 NOT EQUAL 'B'
 26300        IF W6-01-191 EQUAL 'C'
 26400          CALCULATE WORK-DATE + TIME-SPAN = WORK-DATE
 26500          MOVE '8' TO RING-SAVE-CODE
 26600          MOVE 'D' TO W6-01-191 EXIT
 26700        ELSE PERFORM P435-CHANGE-DATE
 26800      ELSE PERFORM P435-CHANGE-DATE
 26900    ELSE NEXT SENTENCE
 27000  ELSE IF EVENT-START-TIME GREATER THAN :1300
 27100    IF RING-TIME LESS THAN :480 MOVE :1 TO TIME-SPAN
 27200      IF W6-01-190 EQUAL 'A'
 27300        CALCULATE RING-DATE + TIME-SPAN = RING-DATE
 27400        CALCULATE WORK-DATE + TIME-SPAN = WORK-DATE
 27500        MOVE 'E' TO RING-SAVE-MARK.
 27600  EXIT.
 27700P435-CHANGE-DATE.
 27800  IF EVENT-START-TIME GREATER THAN :1300
```

12. Click Save or press Enter

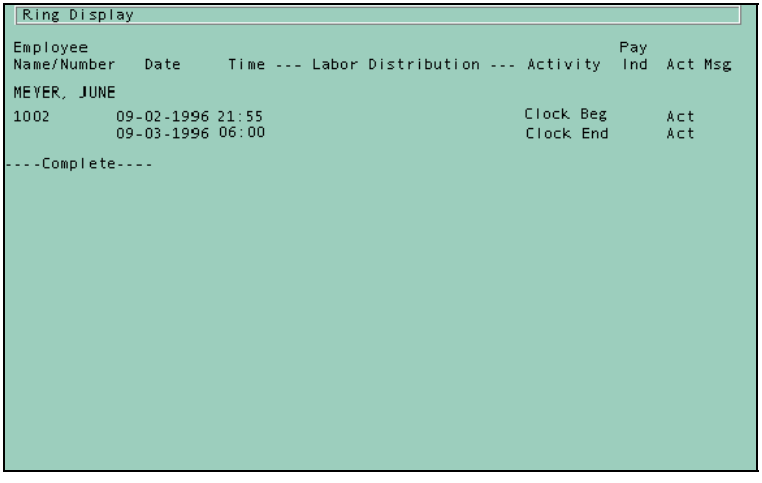
13. Type R to reload the program

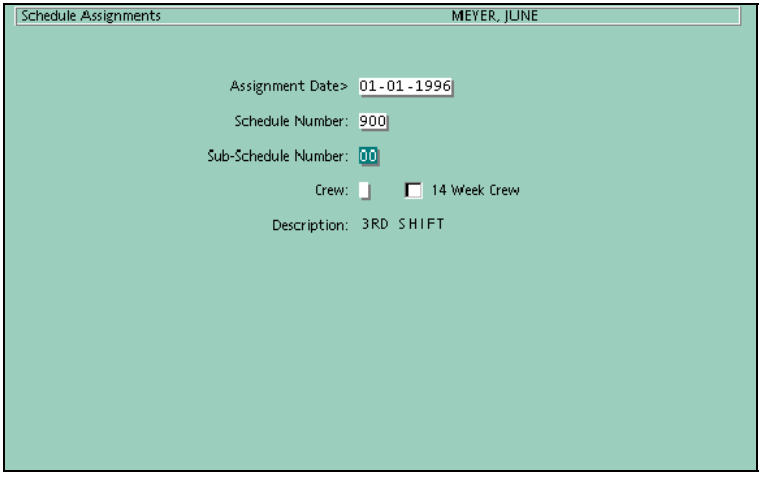
Type 'R' in the Command text box to RELOAD the VALID program.

14. Click OK or press Enter

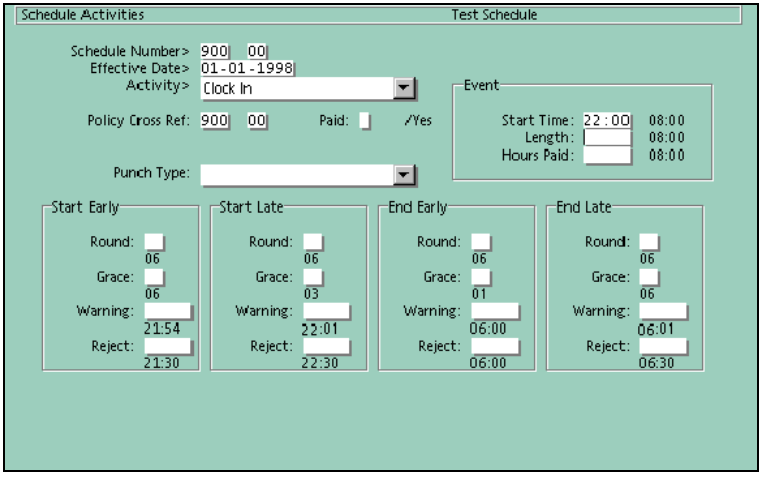
```
VALID  99999E   RELOAD IS OK.  Ver-3.0 LENGTH  9,525 05-26-98 20:15:27
```

When you have completed this modification the time entries will be processed as shown in the following example:

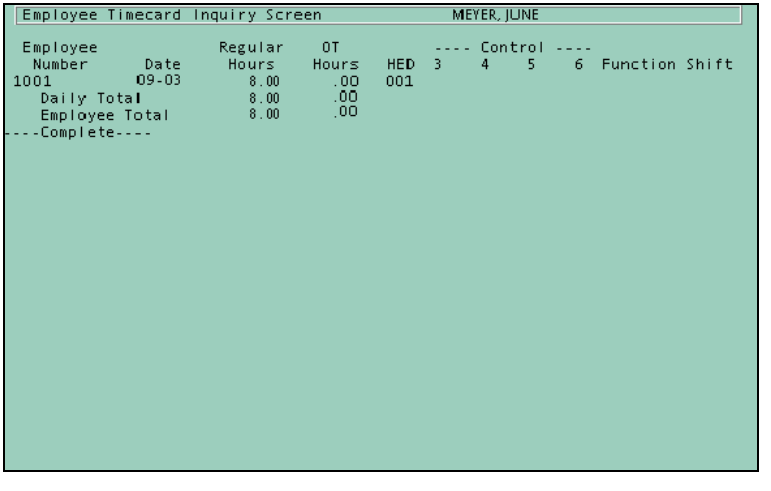




June Meyer is assigned to a schedule that crosses midnight. Her Clock-in punch at 21:55 on 09-02. Her clock-out punch is at 06:00 on 09-03.



Schedule 900-00's EVENT-START-TIME (22:00) is after 21:59. Therefore, the clock-out date (09-03) is populated to the time entry.



Using the Error Correction form TAESCRX.doc

The Error Correction form (TAESCR) can be used to perform many different tasks, using different selection criteria. These are discussed in the following sections:

- Displaying clock transactions (rings)
  - Display clock transaction (ring) exceptions for specific employees (Indirect Method)
  - Display all clock transactions (rings) for an employee (Direct Method)
- View clock transactions (rings) for a specific date
- Track changes made to the Error Correction form
- Correct a schedule error by adding an activity code
- Correct a schedule error by adding a clock transaction (ring)
- Delete a clock transaction (ring)
- Inactivate a clock transaction (ring)
- Options available when viewing clock transaction (ring) errors using the Error Correction form

These different tasks are discussed in the following pages:

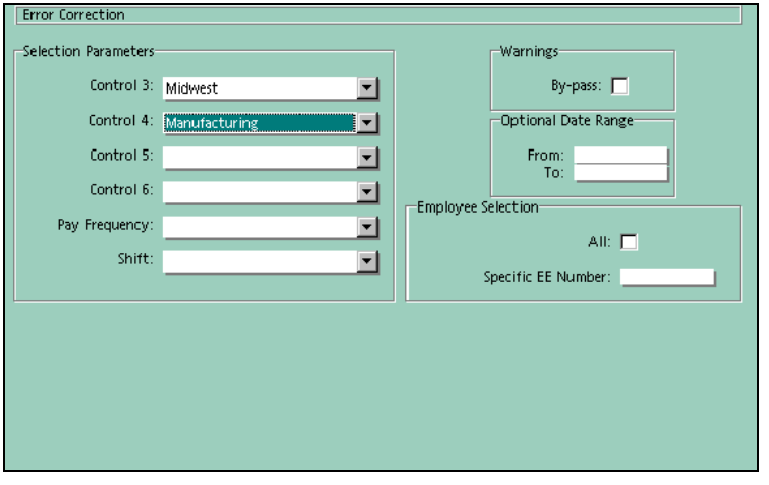
Displaying clock transactions (rings)

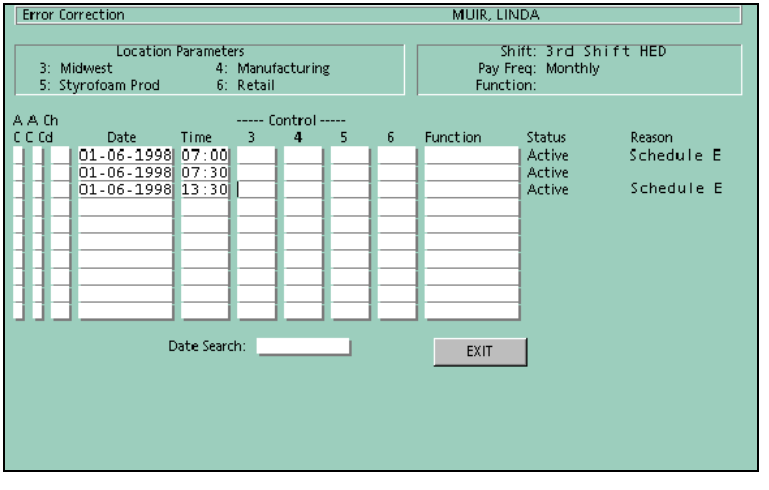
Clock transactions (rings) are accessed by specifying an employee or employee selection criteria. There are two methods to display clock transactions (rings) on the Error Correction form (TAESCR):

- Display clock transaction (ring) exceptions for specific employees (Indirect Method)
- Display all clock transactions (rings) for an employee (Direct Method)

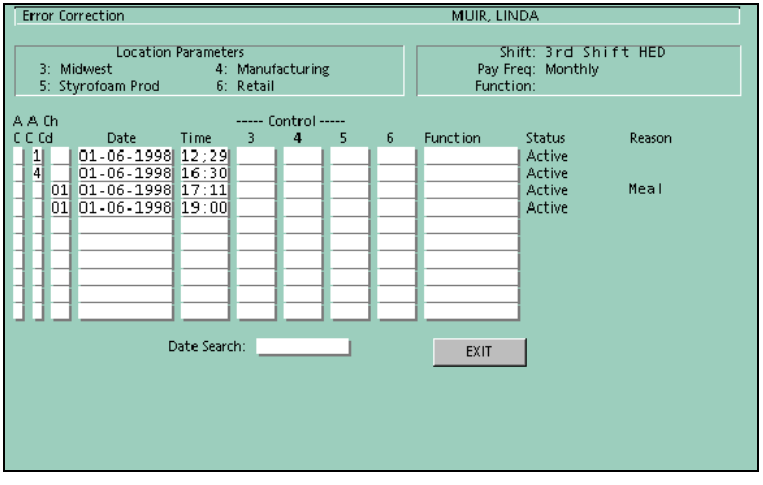
Display clock transaction (ring) exceptions for specific employees (Indirect Method)

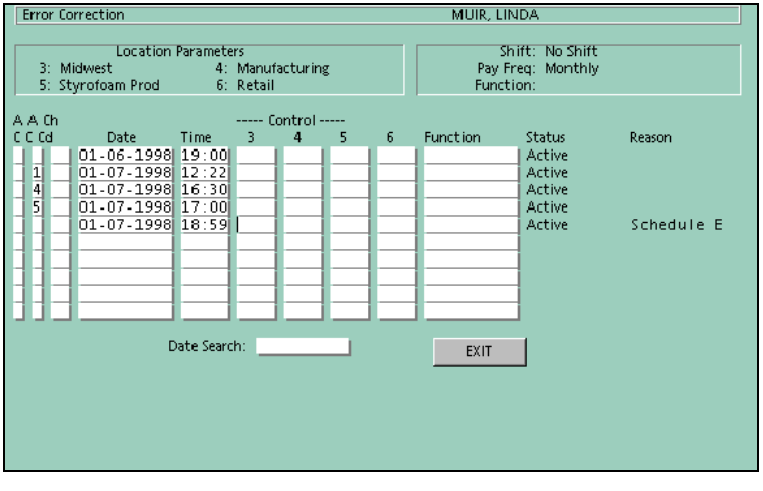
Clock transaction (ring) exceptions (indirect method) are displayed by entering selection criteria on the Error Correction Parameter form (TAESCR). Clock transactions (rings) for employees who match the parameter entries are displayed.



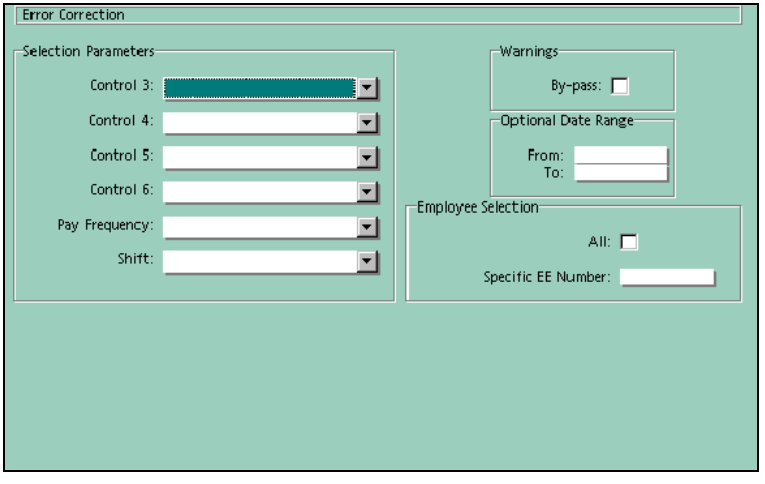


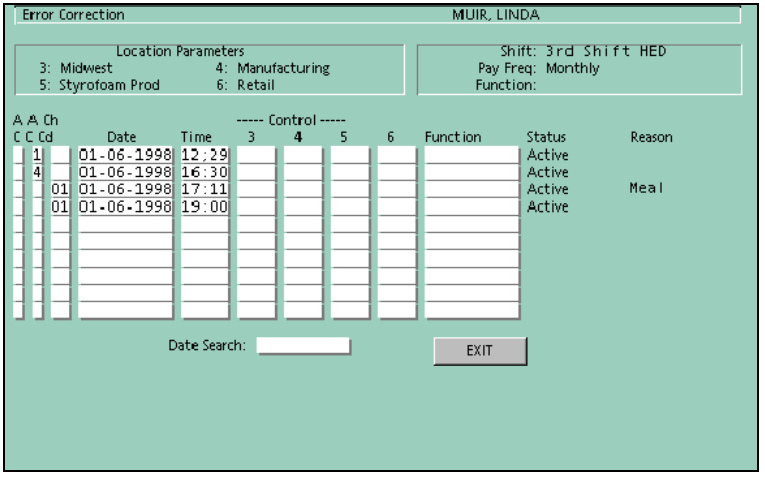
When accessing clock transactions (rings) using the indirect method, dates containing clock transaction (ring) exceptions are displayed. The form displays one date (or shift) of clock transactions (rings) per form before scrolling to the next date for the same employee or the next employee.



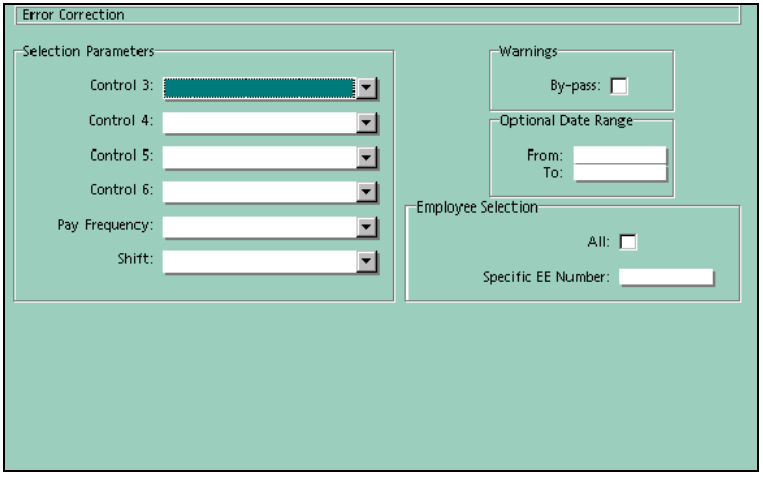


The form continues scrolling through clock transaction (ring) exceptions until no more employees or clock transactions (rings) meet the selection criteria. The form concludes scrolling by displaying the Error Correction Parameter form (TAESCR).





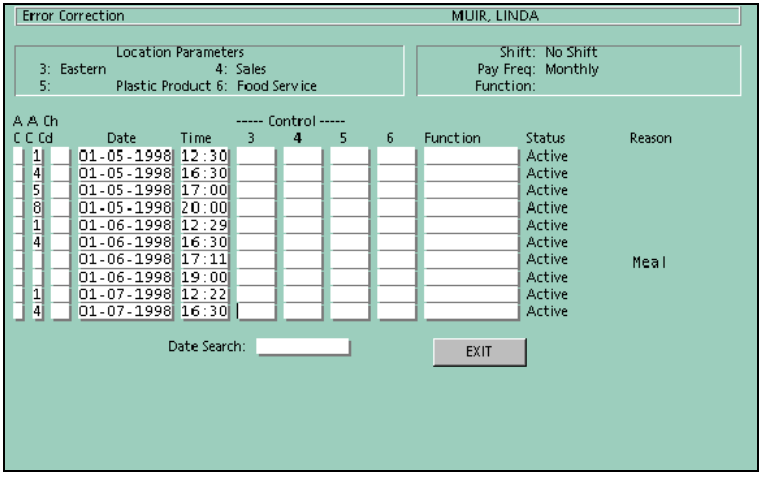
To terminate the scrolling process, you must click the EXIT button. The Error Correction Parameter form is then displayed.



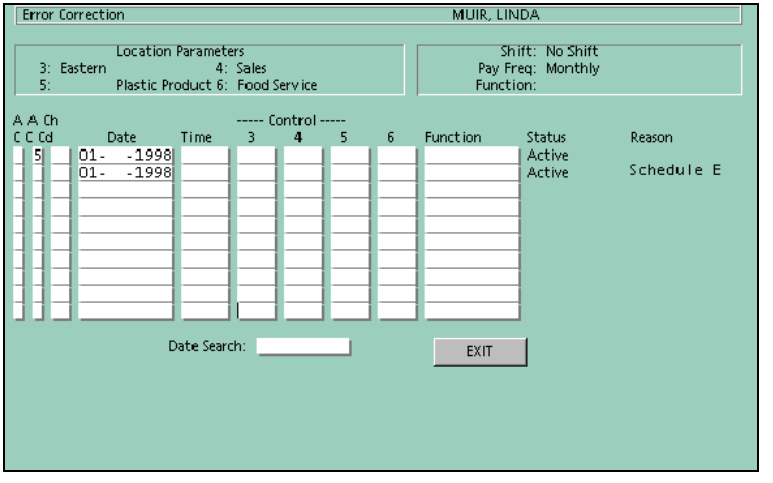
Display all clock transactions (rings) for an employee (Direct Method)

To display all clock transactions (rings) for one employee (direct method), access the Error Correction Parameter form (TAESCR). Then, click on the Employee button and enter a valid Employee number for the organization.

The form displays all clock transaction (ring) records, including non-exceptions, for the specified employee in date and time order.



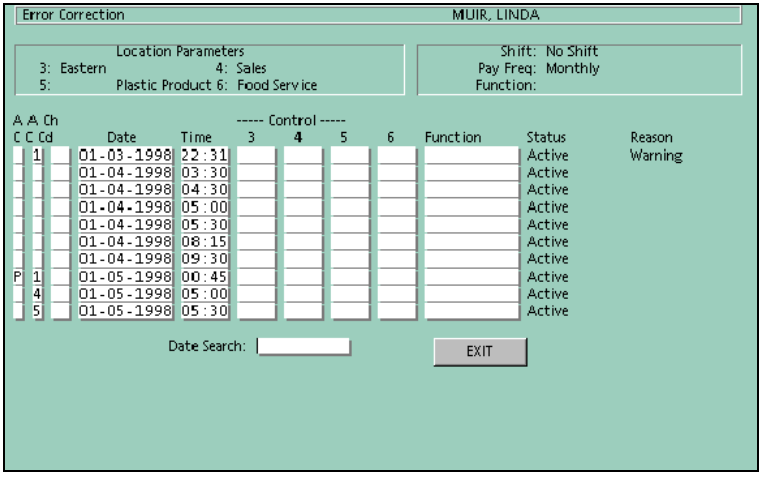
When you press Enter, the form scrolls through additional clock transaction (ring) records.

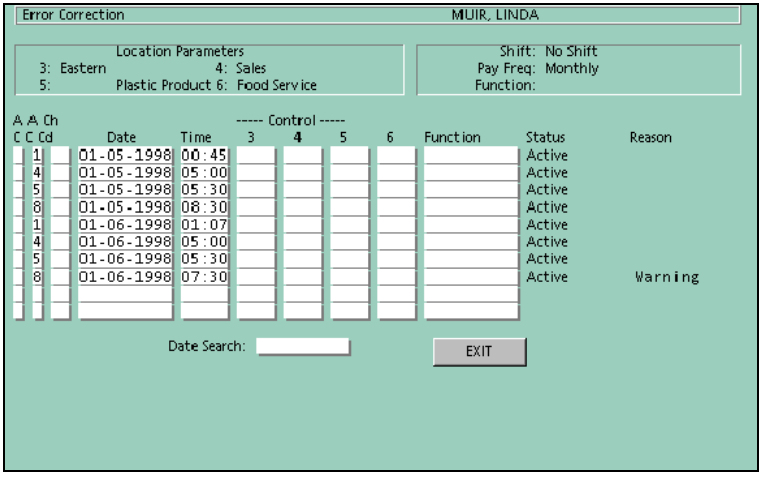


When you are finished with the employee's clock transaction (ring) records, you must click the EXIT button to navigate to the original Error Correction parameter form or select another employee.

Using the Error Correction form to view clock transactions (rings) for a specific date

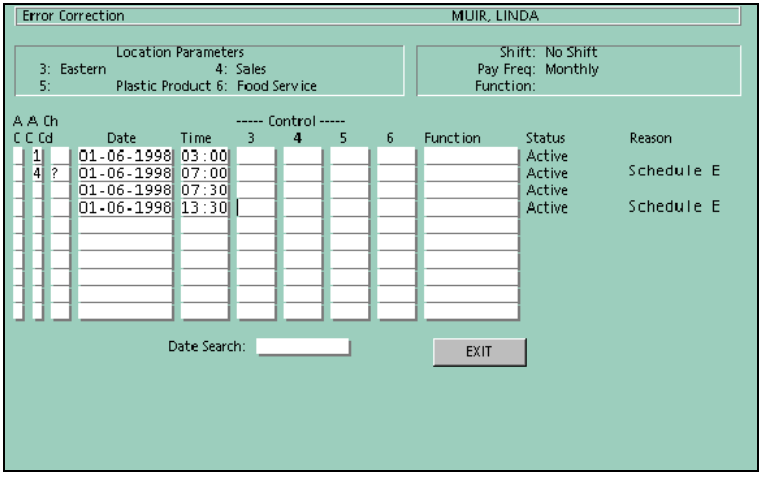
In the Action text box (AC) on the Error Correction form (TAESCR), the Action code 'P' can be used to access clock transaction (ring) errors using the direct method (displaying all clock transactions (rings) for an employee). When you type 'P' on the line containing the clock transaction (ring) you wish to display and press enter, the clock transaction (ring) will display at the top of the form.





Using the Change Code to track changes made to the Error Correction form

The Change Code text box (Ch Cd) is used to track edits on the Error Correction form (TAESCR). It uses code set TN149. If you enter a question mark in the Change Code text box and press enter, a list of all the different change codes reasons held in this options list is displayed.

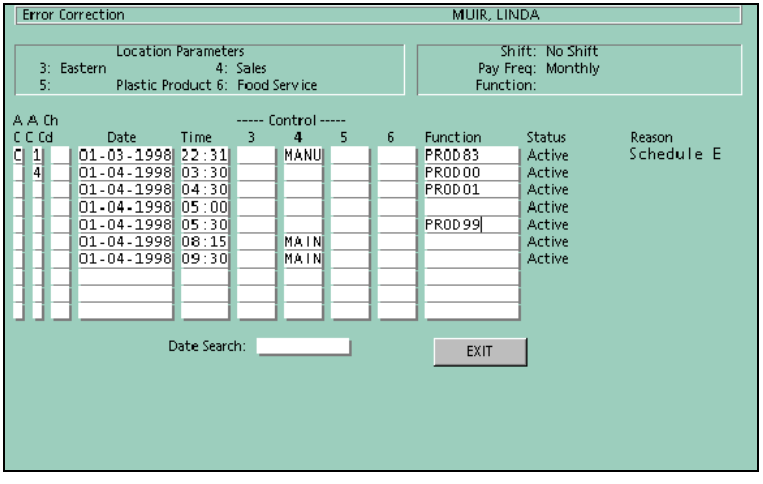


Using the Error Correction form to correct a schedule error by adding an activity code

The Error Correction form (TAESCR) is used to add, change, inactivate, and delete clock transaction (ring) records.

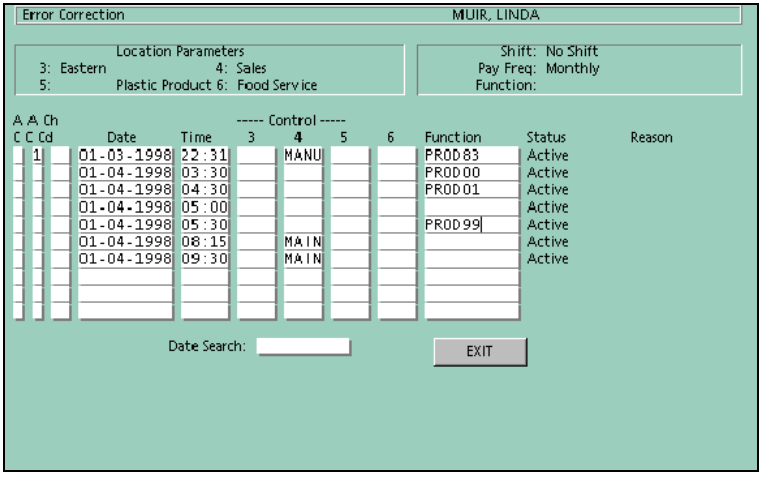
The first entry text box is the Action Code (AC) text box. The valid codes are A (add), C (change), D (delete/inactivate), and P (position to top of form).

The second entry text box is the ring Activity Code (AC) text box, which you may populate when you override schedule errors and add clock transactions (rings). The valid codes are 1-9.



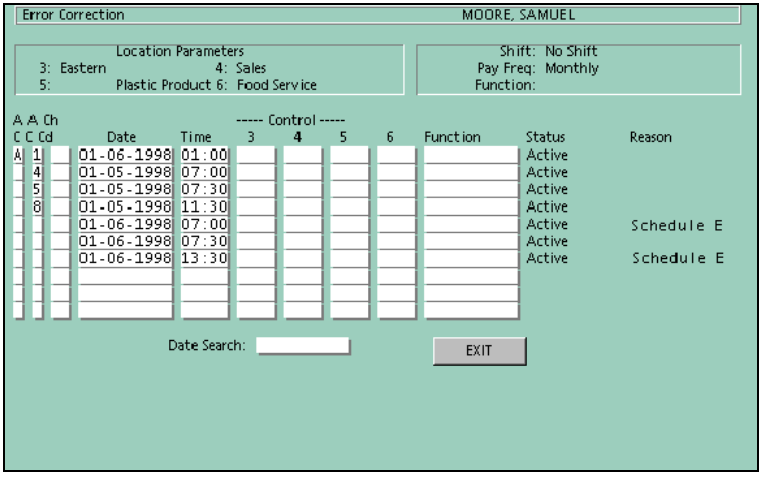
A sample 'change' entry is displayed above. The user populates an Activity Code '1' (Clock-in) in the Activity Change text box (AC) to override the schedule error.

When the user presses Enter, the Activity Code '1' is assigned to the clock transaction (ring) and the exception message (for example, Schedule E) is removed.



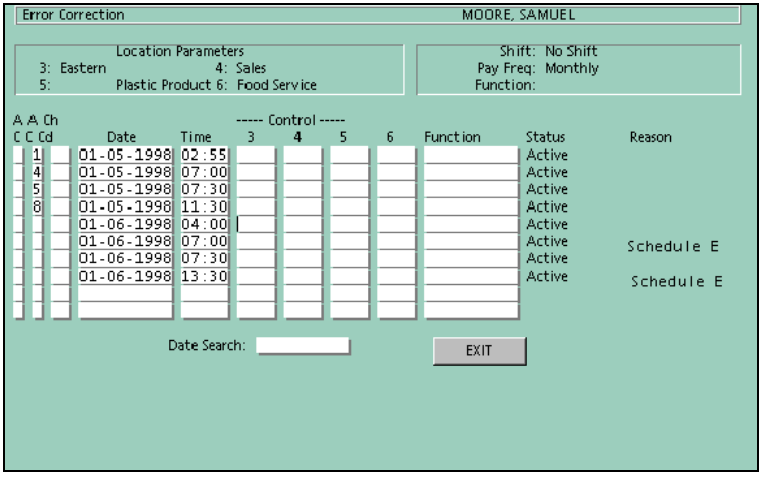
When rings are revalidated, the Time Entry Validation/Creation program will accept the user change and populate the employee's shift's remaining valid rings with Activity Codes.

Using the Error Correction form to correct a schedule error by adding a clock transaction (ring)



When editing clock transactions (rings), you can use any entry line, including one that is already populated. The form will reorder the clock transactions (rings) by date and time.

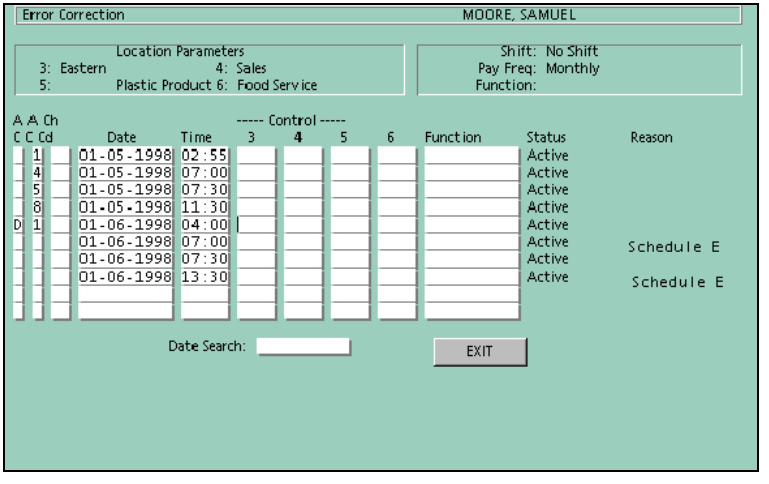
In this example a clock transactions (rings) is missing and a schedule error occurred on 01-06-1998. The correction has been entered on the first line.

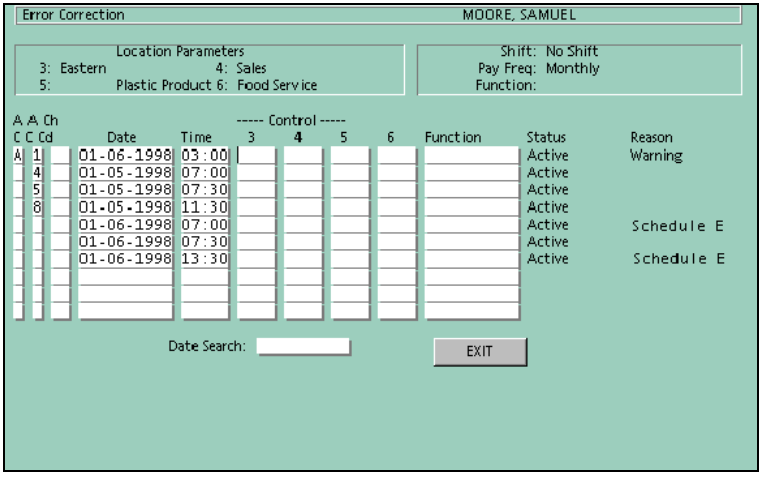


Using the Error Correction form to delete a clock transaction (ring)

Use the Action code 'D' to delete a clock transaction (ring).

Note: A clock transaction (ring) can only be deleted from the file if it was added on the Error Correction form (TAESCR).





Notice that the 01-06-1998 04:00 clock transaction (ring) has been deleted. The user is adding a correcting clock transaction (ring) for the same date for 03:00.

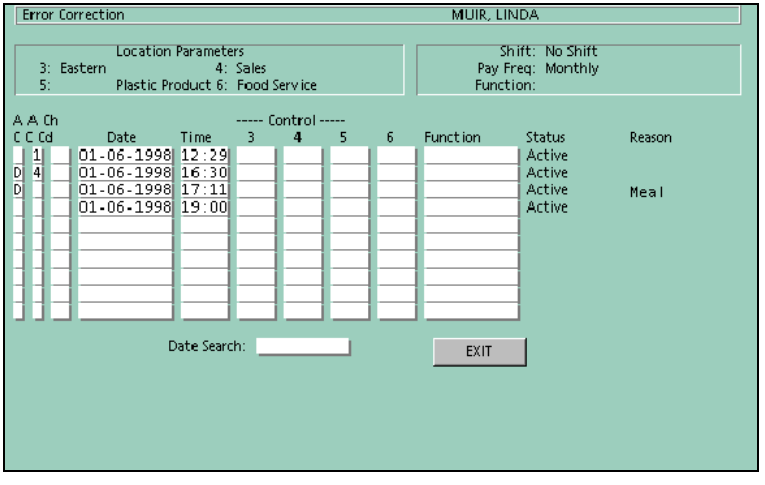
See also:

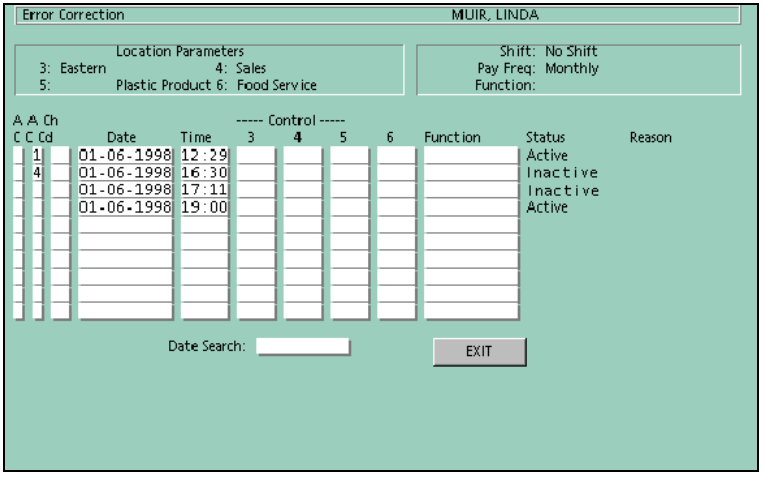
- Using the Error Correction form to correct a schedule error by adding a clock transaction (ring) ***(on page 472)***

For an explanation of how to add a clock transaction (ring) using the Error Correction form.

Using the Error Correction form to inactivate a clock transaction (ring)

Use the Action code 'D' to inactivate a clock transaction (ring). When a clock transaction (ring) has been added to the Employee Database using the Upload Rings program it can only be inactivated on the Error Correction form (TAESCR). It cannot be deleted.

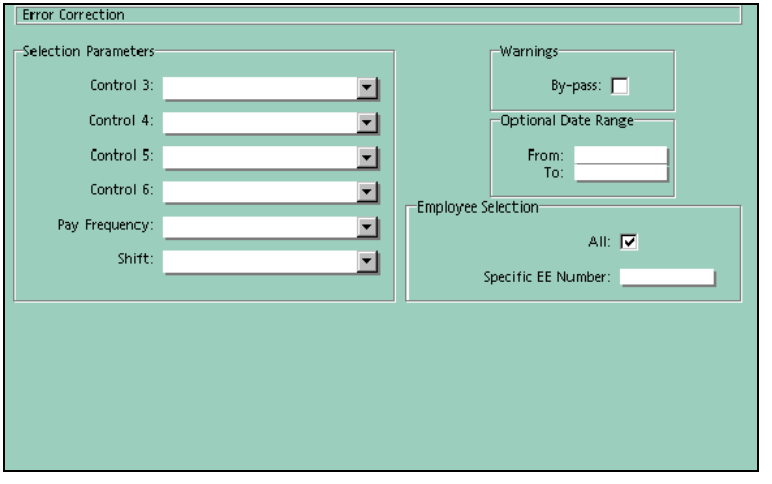


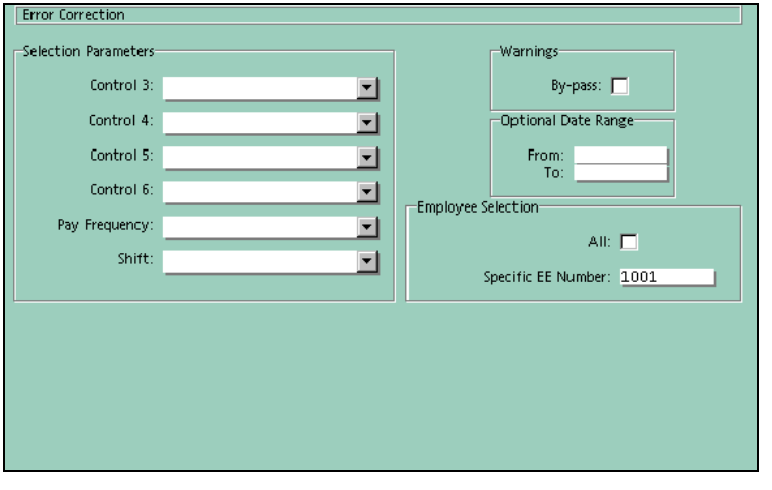


The clock transactions (rings) statuses are set to Inactive. The Time Entry Validation Creation form bypasses inactive clock transactions (rings).

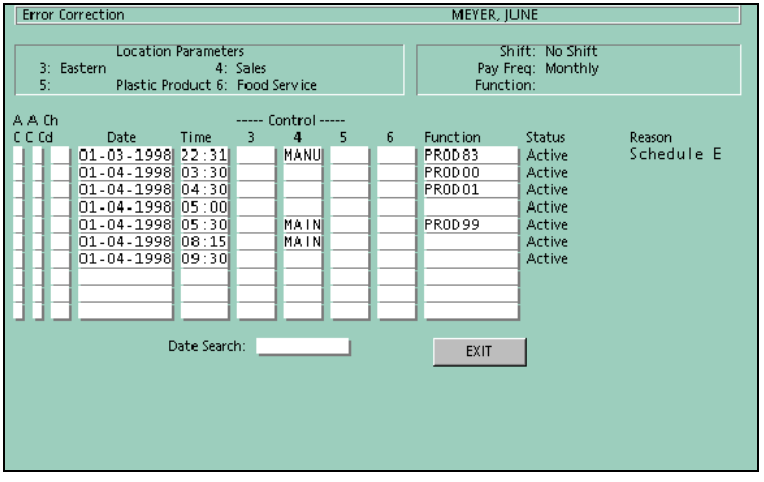
Options available when viewing clock transaction (ring) errors using the Error Correction form

To edit clock transaction (ring) exception records for all employees in an Organization, click All in the Employee Selection box on the Error Correction form (TAESCR).

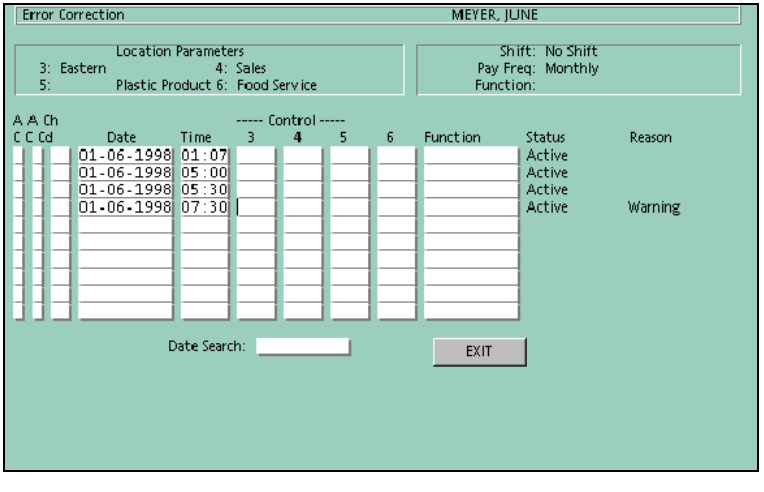




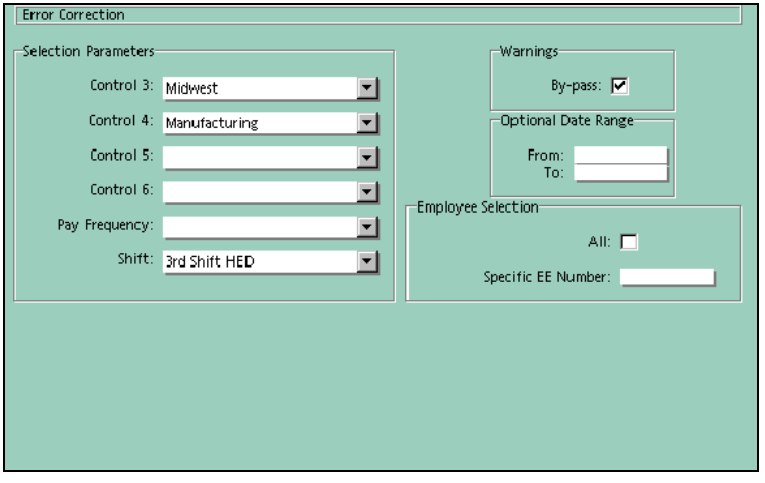
To edit clock transaction (ring) exceptions for one employee, enter the Employee Number in the Specific Employee Number text box.



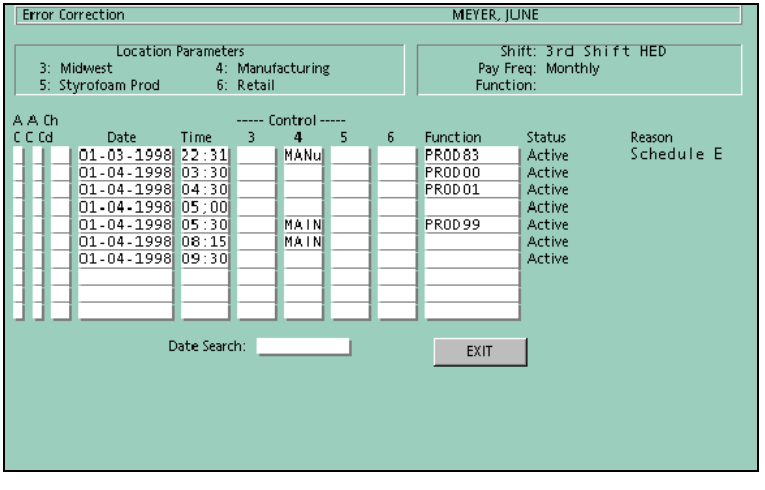
The form displays one date (or shift) of clock transactions (rings) per form while scrolling.



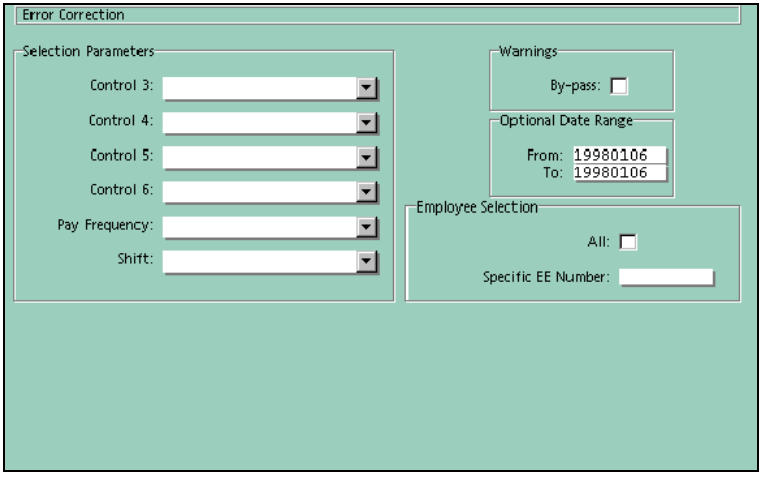
To scroll past clock transaction (ring) warning records, click By-pass in the Warnings box.



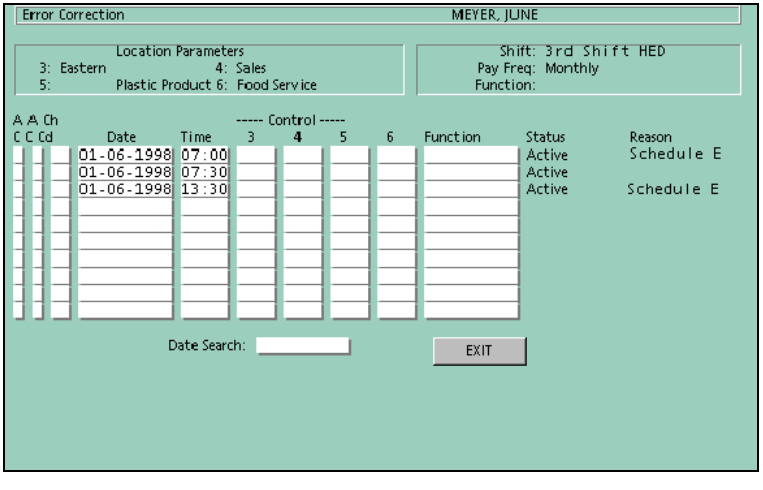
Only schedule errors (clock transaction (ring) exceptions for which no activity codes are assigned) are displayed. The clock transaction (ring) warning records are bypassed.



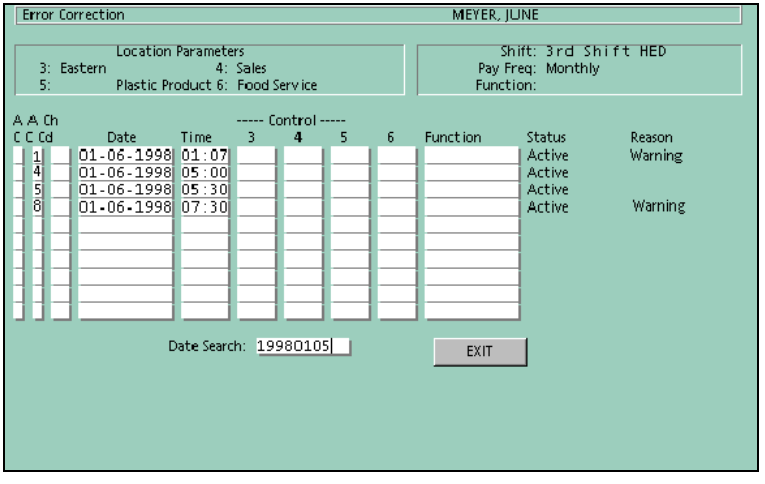
To display clock transaction (ring) records for a specific date range, enter the From and To dates in the text boxes in the Optional Date Range box.

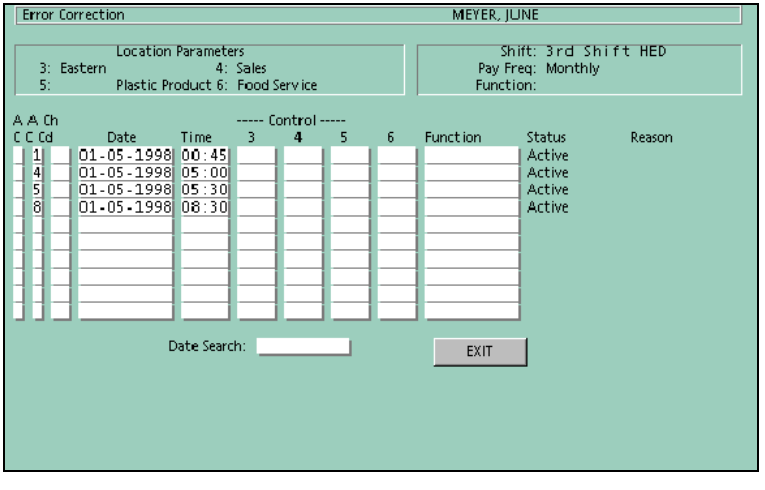


Only clock transaction (ring) exceptions containing the specified dates are displayed (in this example, warnings are bypassed).



While scrolling, you can navigate to an employee's clock transaction (ring) records starting with a specified date. Enter the date in the Date Search text box.





The form will display clock transaction (ring) records, including those that are not exceptions, starting with the specified date. The form will then scroll to the next shift of clock transaction (ring) exception records.

Note: You may also use the Date Search text box to navigate when using the direct method.

See also:

- Display all clock transactions (rings) for an employee (Direct Method) ***(on page 468)***

For an explanation of how to view clock transaction (ring) using the direct method.

Using the Time and Attendance Solution with Labor Overrides

Time and Attendance Administration features labor tracking of hours through time entry generation based on location and job worked.

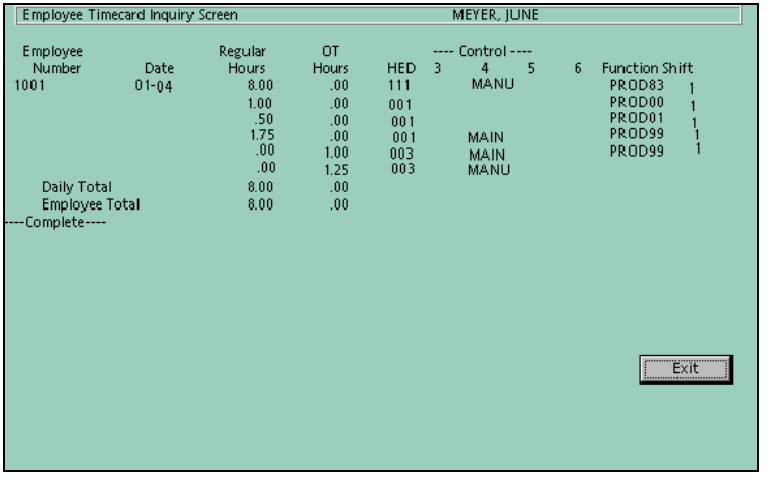
Employees or users can specify a location (Organization Levels 3, 4, 5, or 6) or job (Function) when clock transactions (rings) are created or modified. For example, employees can key in job codes on a clock keypad, then swipe the clock to create the clock transaction (ring) records. The employees may do this several times per shift as they work different jobs. The clock transactions (rings) will contain Function Codes and separate time entries will be generated reflecting the hours performed on each job.

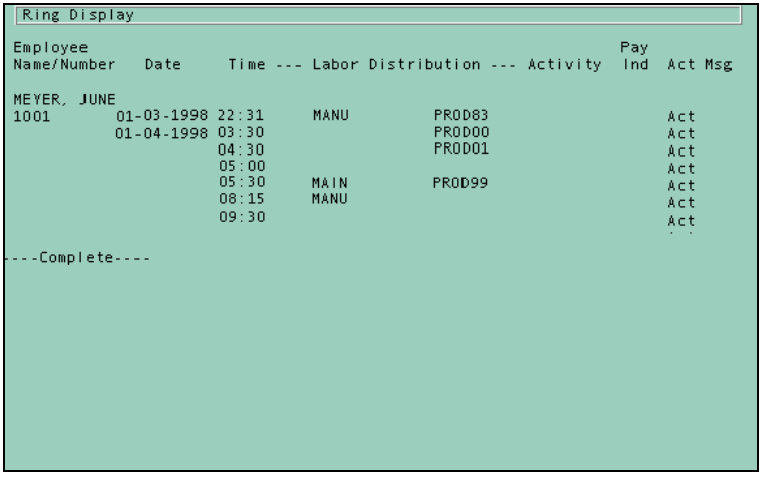
Other examples of populating the labor overrides are Organization Level 3 through 6 and Function overrides on bar codes and using the Error Correction form (TAESCR). An employee can run a wand over an appropriate color-coded bar code situated at a clock to reflect the location or job. Or the user can enter an Organization Level 3 through 6 or Function when modifying and adding clock transactions (rings) on the Error Correction form.

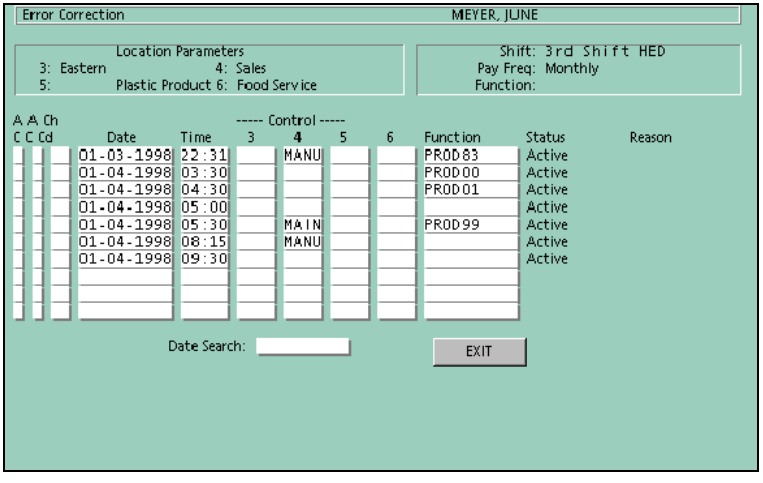
Below are nine sample clock transactions (rings) and the resulting time entries for one employee for one shift for 01-03-1998 and 01-04-1998. The clock transactions (rings) are in the RINGS05 file to be input to the Upload Rings program. Note the labor overrides for Organization Level Four and Function.

```
   Date     Time    Control    Badge  ----Control----- Function
      |       |      1-2         |      3    4    5    6      |
      |       |      |           |      |    |    |    |      |
      |       |      |           |      |    |    |    |      |
002 980103 2231   999999    1001          MANU          PROD83
002 980104 0330   999999    1001                        PROD00
002 980104 0430   999999    1001                        PROD01
002 980104 0500   999999    1001
002 980104 0530   999999    1001          MAIN          PROD99
002 980104 0815   999999    1001          MANU
002 980104 0930   999999    1001
```

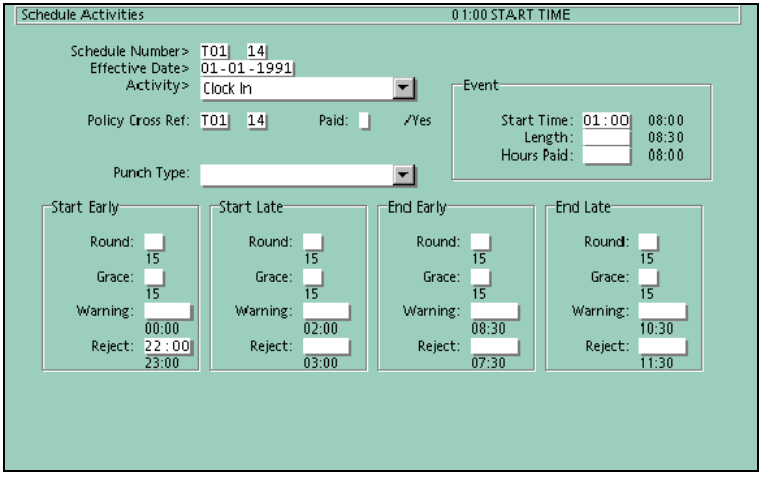
Here are the clock transactions (rings) as displayed on the Employee Database from the Upload Rings program before validation.

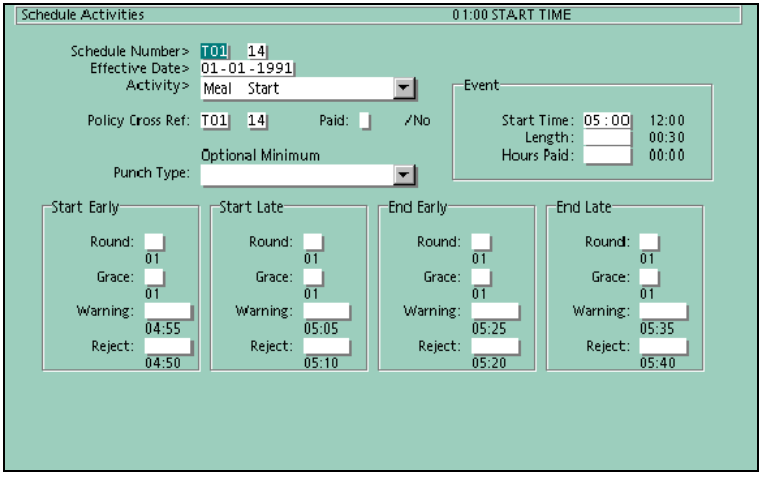






The employee's schedule contains activities 01:00 Clock In (1), 05:00 Meal Start (4), 05:30 Meal End (5), and 09:30 Clock-End (8).

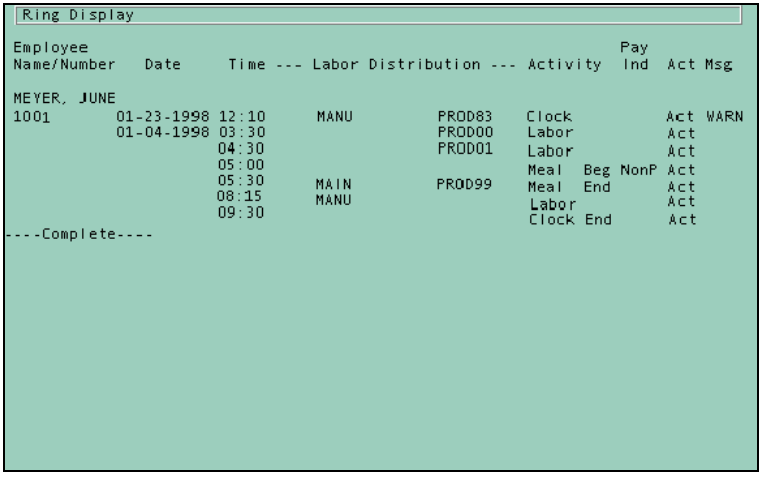




Time Entry Validation/Creation form assigns clock transactions (rings) with labor overrides one of the following activity codes:

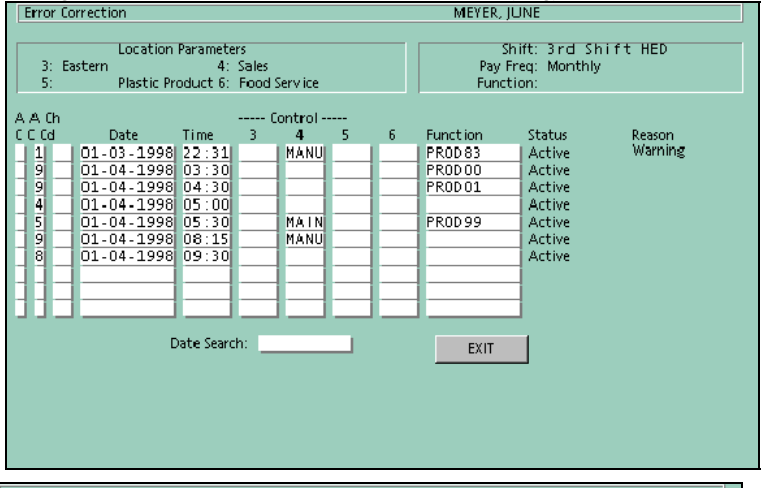
- 1 Clock Start
- 3 Break End
- 5 Meal End
- 7 Break End
- 9 Labor

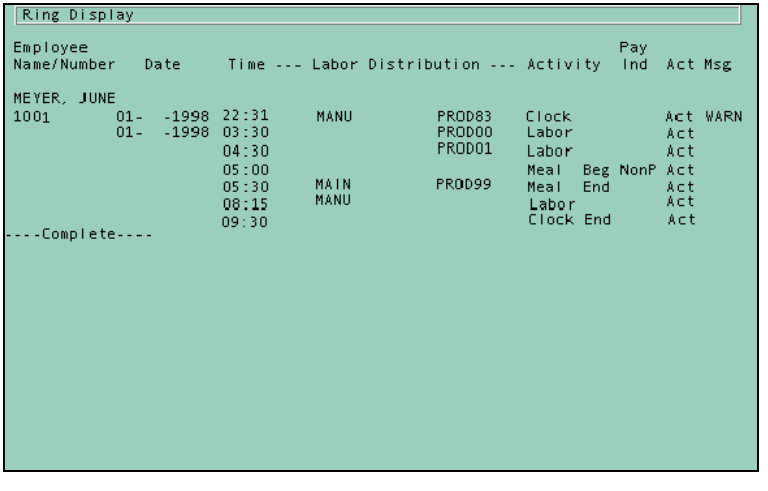
Only clock transactions (rings) reflecting work time or the start of a work-period (for example, 5 Meal End) may contain labor overrides. Rings for the start of non-work time (for example, 4 Meal Start) cannot contain labor overrides.



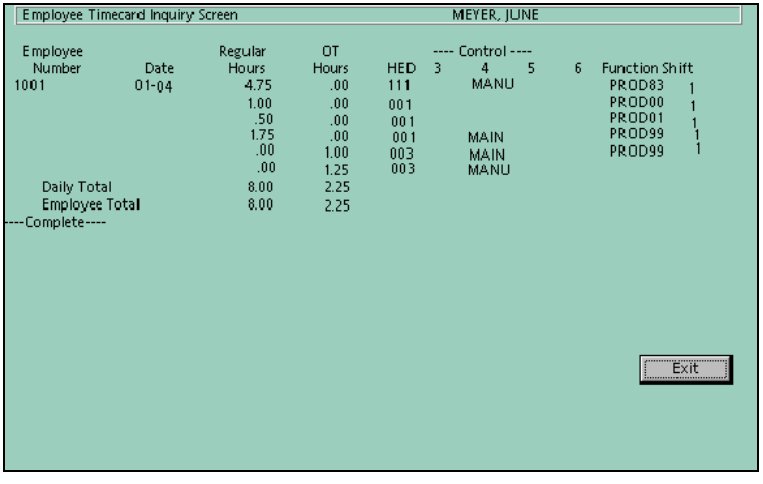
The Time Entry Validation/Creation form bypasses schedule Warning and Reject time validation and assigns a 9 Labor activity code to a ring if all of the following are true:

- A Clock Start (1) clock transaction (ring) is present for the shift.
- Labor overrides (Organization Level Three, Four, Five, or Six, or Function) are present on the clock transaction (ring).
- For each non-work start activity (4 Meal Start) that has been validated, a non-work end activity (5 Meal End) has been assigned. For example, if the Time Entry Validation/Creation form has assigned a 4 to a clock transaction (ring), it will attempt to assign a 5, never a 9, to the next clock transaction (ring).

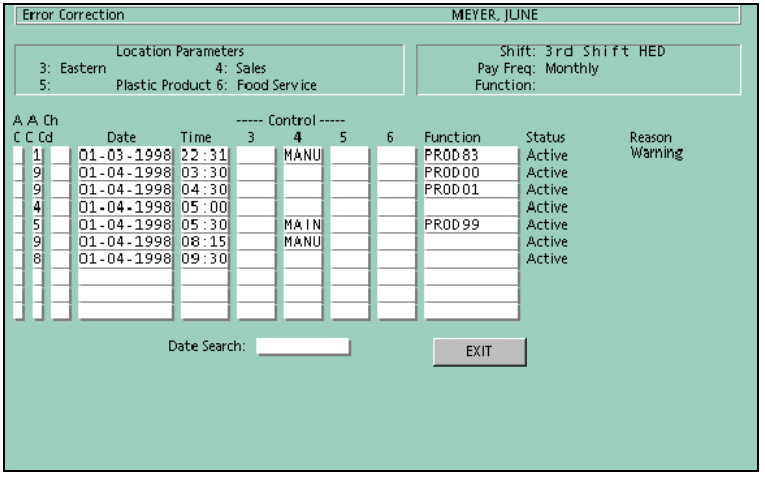


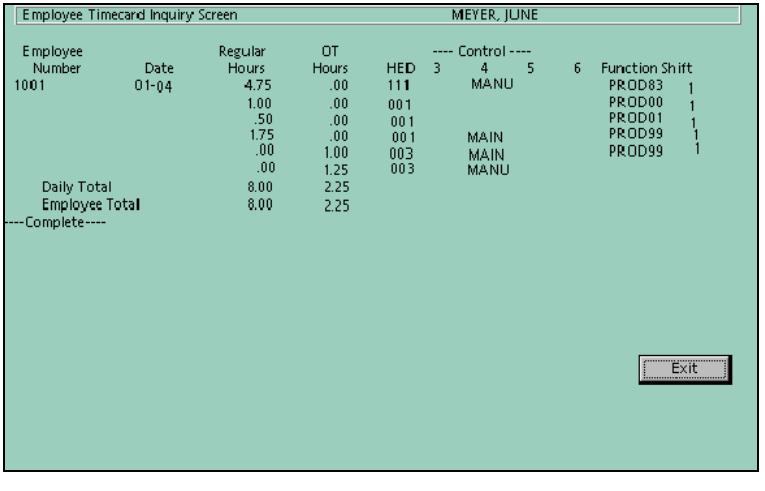


For the 10.25 hours paid, a separate time entry is generated for the labor overrides. A detailed explanation is on the next page.



- The first time entry is generated for 4.75 hours for Organization Level Four MANU, Function PROD83 for the rounded times 22:45 to 03:30.
- The second is for 1.00 hours for Function PROD00 for the rounded times 03:30 to 04:30.
- The third is for .50 hours for Func. PROD01 for 04:30 to 05:00.
- The fourth is 1.75 hours (regular) for Organization Level Four MAIN and Func. PROD99 for 05:30 to 07:15.
- The fifth is 1.00 hours (overtime) for Organization Level Four MAIN and Func. PROD99 for 07:15 to 08:15.
- The sixth is 1.25 hours (overtime) for Organization Level Four MANU for 08:15 to 09:30.





APPENDIX C

Queries and Maintenance

In This Appendix

Overview of Queries and Maintenance

This section provides an explanation of the different queries and maintenance programs that are included with Time and Attendance Administration.

Absence Tracking query (TRACK)

The Absence Tracking query (TRACK) will display a total number of absences per employee. This allows you to view online the total number of absences for employees other than vacation or holiday.

The query also allows you to specify the length of the time span from the current date on which to report.

It can be used to compare the total incidents of absences between employees or between departments.

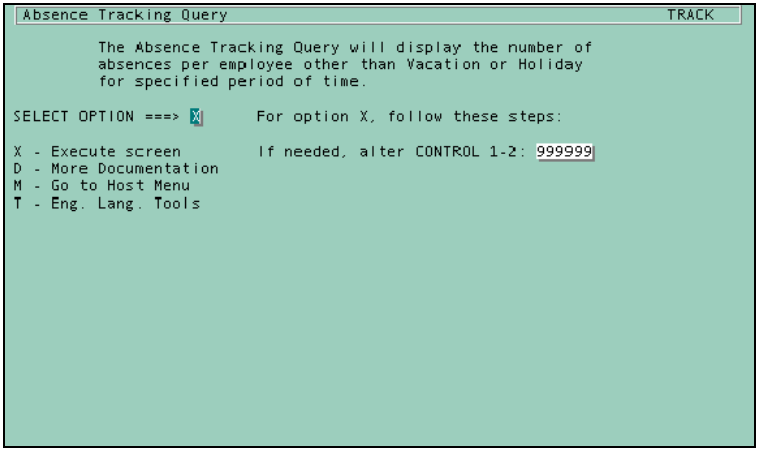
1. Absence Tracking query (TRACK)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: List Total Absence by Employee

2. Enter an Organization

Enter the Organization that you want to query.



3. Click Save or press Enter

The Absence Tracking Query Parameters form is displayed

4. Enter a date range

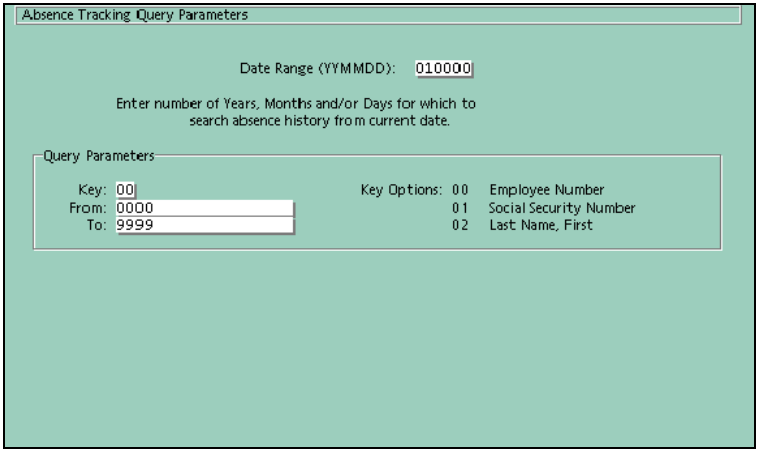
The Date Range text box allows you to indicate how far back you would like to search for absence data. Enter dates in YYMMDD format where YY is the number of years to be included, MM is the number of months to be included, and DD is the number of days to be included. For example to search back 1 and 1/2 years enter '010600' for one year, 6 months, and no days.

5. Enter a Key Type

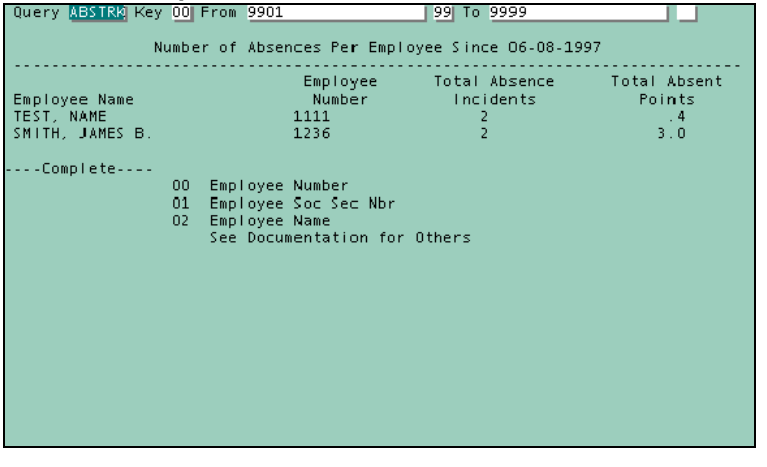
Note: The text boxes in the Query Parameters group box work in the same way as the same text boxes on the QUERY form.

6. Enter a From and To value

The From and To text boxes are the low and high range of whatever Key you selected. For example, if you selected 00 as the key, the From text box would be the lowest employee number to include and the To text box would be the highest employee number to include.



7. Click Save or press Enter



See also:

■ **Tracking Employee Absences** *(on page 233)*

For a more explanation on when to use this query.

Absent query (ABSENT)

The Absent Query Parameters query (ABSENT) provides an online listing of all scheduled employees who have not clocked in within a specified time range. It can be used shortly after the Schedule start time to display absent employees. It can also be run at a later time to check employee absences. This query allows you to specify a date range, time range, and a number of hours outside the specified From and To times (Out of Bounds) to be included in the search.

Running online

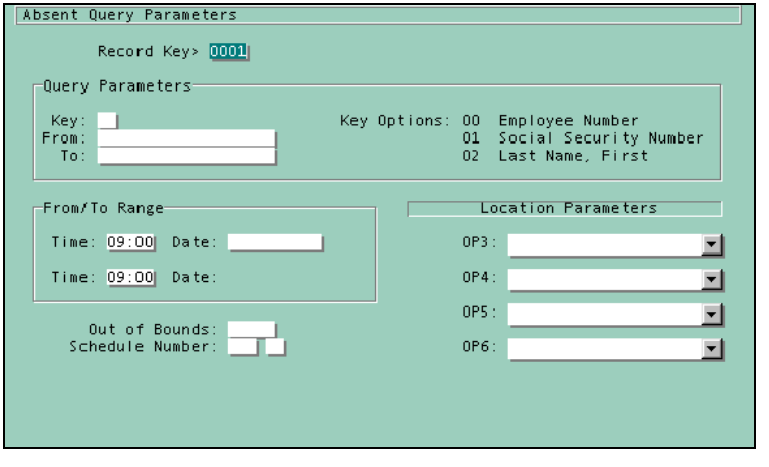
The Absent query has its own parameters selection form that allows you to enter selection criteria and activate the program. This form allows you to specify a date range, time range, out-of-bounds time, schedule number, and employee organization levels to be included in the process.

Note: At least one of these text boxes must be populated: From time and Schedule Number.

1. Access the ABSENT query (ABSENT)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Online Queries
Task: Absent Scheduled Employee



2. Enter a Record Key

Enter a four-character key to establish a table record of ROSTER parameters. The next time you use the query, you can access this same table record and not have to reenter all of the same parameters.

3. Enter a Key Type

Note: The text boxes in the Query Parameters group box work in the same way as the same text boxes on the QUERY form.

4. Enter a From and To value

The From and To text boxes are the low and high range of whatever Key you selected. For example, if you selected 00 as the key, the From text box would be the lowest employee number to include and the To text box would be the highest employee number to include.

5. Enter a From time

Enter a beginning time for which to search for clock transactions (rings).

6. Enter a From date

Enter the date for which you want the query to search for clock transactions (rings).

7. Enter To time

Enter an ending time for which to search for clock transactions (rings).

8. Enter a date

Enter the date for which you wish to search for clock transactions (rings).

9. Enter an Out of Bounds value (optional)

The optional Out of Bounds time text box is used to broaden the search parameters. The time entered in this text box is subtracted from the From time to determine an early out-of-bounds and added to the To time to determine a late out-of- bounds.

Employees who meet the following criteria are displayed with the message OUT-OF-BOUNDS or UNSCHED-BOUNDS, depending on whether or not they are scheduled to work on the date selected.

- Clock transactions (rings) between the early Out of Bounds time and From time
- Clock transactions (rings) between the To time and the late Out of Bounds time

Employees with no clock transactions (rings) between the two out-of-bounds times are listed as absent.

Note: If Out of Bounds text box is left blank, no out-of-bounds time is calculated.

10. Enter a Schedule Number

Use this text box to select employees by schedule assignment. If you do not enter a value in the Sub-Schedules text box, all the employees assigned to any Sub-Schedules for that Schedule will be included.

If an entry is made in the first Schedule Number text box or both of these text boxes, the search parameters for clock transactions (rings) information will be the Schedule's Start Early Reject time through End Late Reject time defined on the Schedule Activities form.

If no Schedule Number is entered on the form, the From time and To time values are used to search for clock transactions (rings).

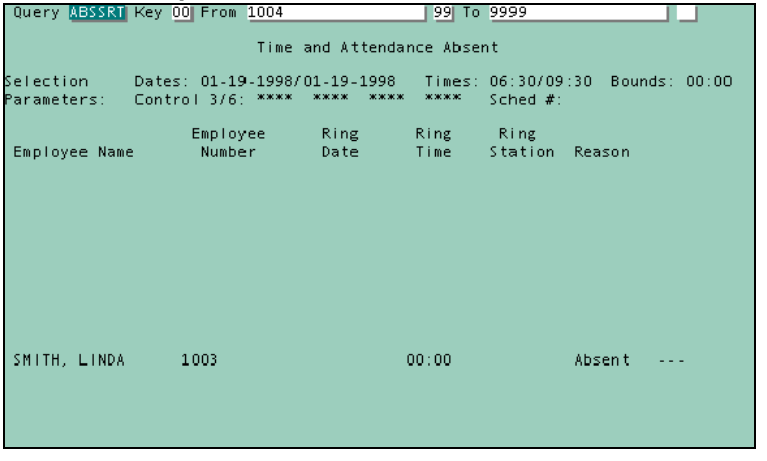
Employees without clock transactions (rings) during this time frame are identified as ABSENT if their Type of Day as defined on the Type of Day Assignment form specifies they should be present, and UNSCHED-ABSENT if they are not scheduled to work.

11. Select Organization Level options

The Location Parameters Organizations 3 through 6 correspond to the Organizations 3 through 6 as assigned on the Employee Information or Payroll Home Location/Pay Allocations forms.

If any or all of these text boxes are populated on the ABSENT form, only employees with matching codes will be included in the query.

12. Click Save or press Enter



See also:

- ***Tracking Employee Absences***

For a more explanation on when to use this query.

Absent Status query (STATUS)

The Absence Status query (STATUS) allows you to view, online, all absences for employees. This information can be used to verify proper assignment of absent hours. The query allows you to specify the length of the time span from the current date on which to report.

The query also indicates if the absence is paid or not, and whether or not the paid absences have had time entries generated for them.

Running online

Although the Absence Status query is designed as a query program, it has its own parameters selection form that, besides allowing you to specify a time span on which to report, allows you to activate the program without going to an additional Query Parameters form.

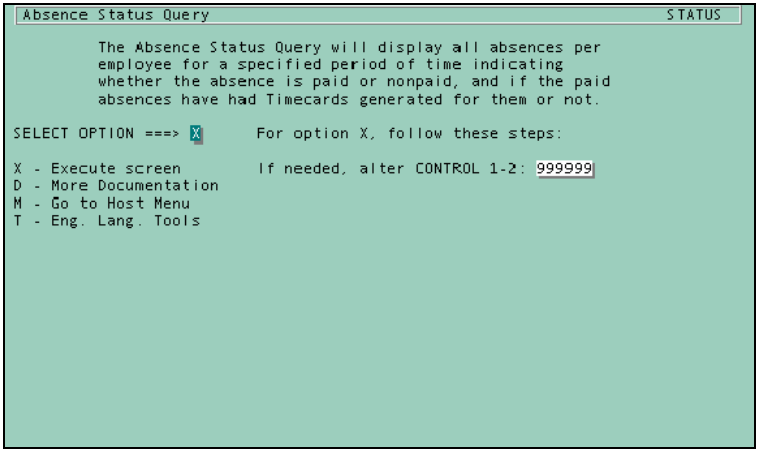
1. Access the STATUS query

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: List Absence Information by Employee

2. Enter an Organization

Enter the Organization that you want to query.



3. Click Save or press Enter

The Absence Tracking Query Parameters form is displayed

4. Enter a date range

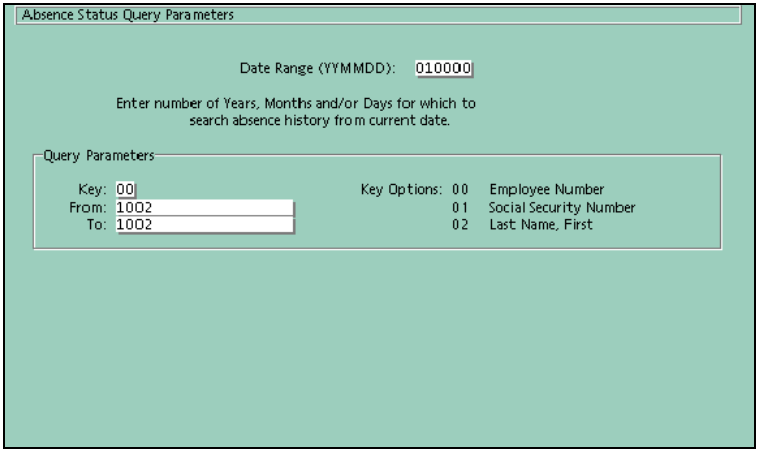
The Date Range text box allows you to indicate how far back you like to search for absence data. Enter dates in YYMMDD format, where YY is the number of years to be included, MM is the number of months to be included, and DD is the number of days to be included. For example, to search back one and a half-years enter: (010600) for one year, six months and no days.

5. Enter a Key Type

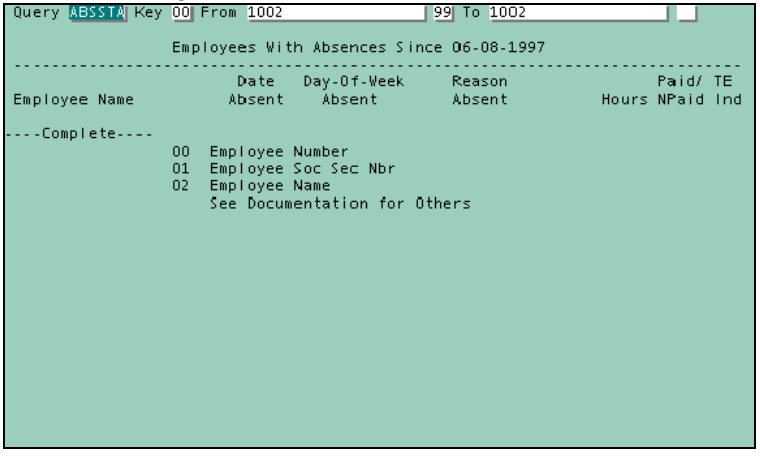
Note: The text boxes in the Query Parameters group box work in the same way as the same text boxes on the QUERY form.

6. Enter a From and To value

The From and To text boxes are the low and high range of whatever Key you selected. For example, if you selected 00 as the key, the From text box would be the lowest employee number to include and the To text box would be the highest employee number to include.



7. Click Save or press Enter



See also:

■ **Tracking Employee Absences** *(on page 233)*

For a more explanation on when to use this query.

Absent Type query (TYPE)

The Absent Type query (TYPE) will display all absences for selected employees. You can specify an Absent Type on which to report or, by not specifying an Absent Type, report on all absent types.

You can then view, online, all absences, or a specified type of absence, for selected employees. This allows you to verify proper assignment of absent hours.

The information can also be used to identify trends for specific types of absences.

Running online

Although the Absent Type query is designed as a query program it has its own parameters selection form that, besides allowing you to specify a date range, absent type, and employee organization levels to be included, allows you to activate the program without going to an additional Query Parameters form.

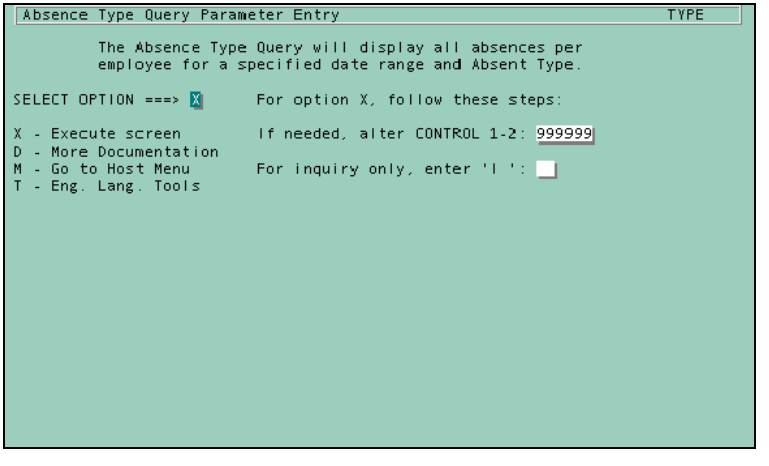
1. Access the Absent Type query (TYPE)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: Query Absences by Type

2. Enter an Organization

Enter the Organization that you want to query.



3. Click Save or press Enter

The Absence Tracking Query Parameters form is displayed

4. Enter a Record Key

Enter a four-character key to allow several operators to set up the parameters they use most often. This way you do not have to reenter the parameters each time you use the query.

5. Enter a Key Type

Note: The text boxes in the Query Parameters group box work in the same way as the same text boxes on the QUERY form.

6. Enter a From and To value

The From and To text boxes are the low and high range of whatever Key you selected. For example, if you selected 00 as the key, the From text box would be the lowest employee number to include and the To text box would be the highest employee number to include.

7. Enter a From date

The date from which you want the query to display records for.

8. Enter a To date

Enter the date to which you want the query to report.

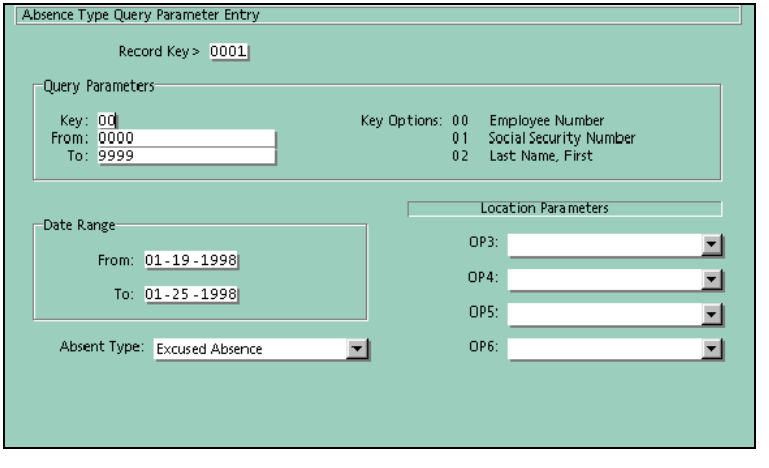
9. Select an absence type

The Absent Type text box allows you to specify one Absent Type to be included in the query. If this text box is populated, only that type of absence will be displayed. If the text box is not populated, all Absent Types will be included in the query.

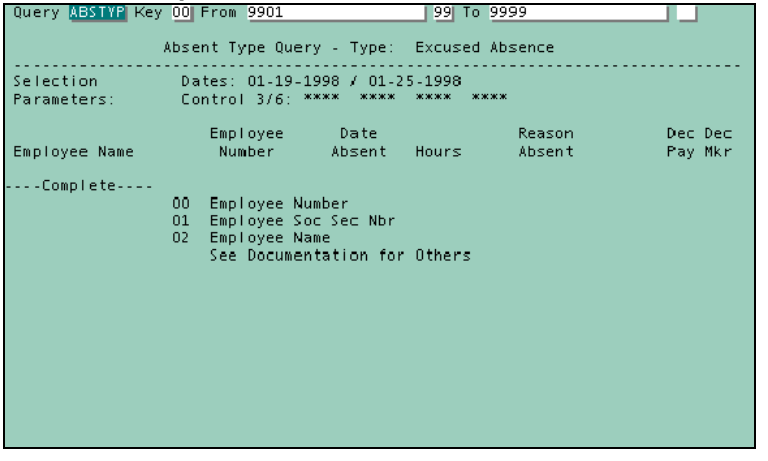
10. Select Organization Level options

The Location Parameters Organizations 3 through 6 correspond to the Organizations 3 through 6 as assigned on the Employee Information or Payroll Home Location/Pay Allocations forms.

If any or all of these text boxes are populated on the Absent Query Parameters query, only employees with matching codes will be included in the query.



11. Click Save or press Enter



See also:

■ **Tracking Employee Absences** ***(on page 233)***

For a more explanation on when to use this query.

Approved Absences query (APPROV)

The Approved Absences query (APPROV) allows you to view online all approved absences or a specified type of approved absence for selected employees. It is used to verify proper assignment of absent hours.

The query can also be used to determine trends of specific types of absences.

Note: *Absences are considered approved if the absent approval code for the record begins with an "A".*

Running online

The Approved Absences query has its own parameters selection form that allows you to enter selection criteria and activate the program. This form allows you to specify a date range and absence type.

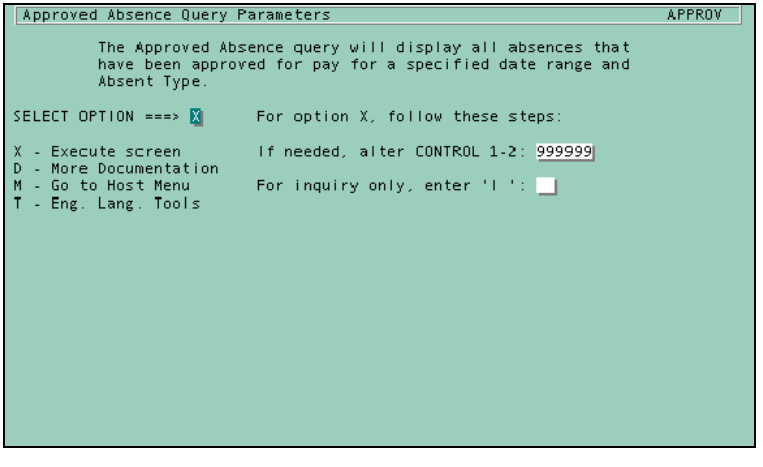
1. Access the Approved Absences query (APPROV)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: Query Approved-for-Pay Absences

2. Enter an Organization

Enter the Organization that you want to query.



3. Click Save or press Enter

The Absence Tracking Query Parameters form is displayed

4. Enter a Record Key

Enter a four-character key to establish a table record of APPROV parameters. The next time you use the query, you can access this same table record and not have to reenter all of the same parameters.

5. Enter a Key Type

Note: The text boxes in the Query Parameters group box work in the same way as the same text boxes on the QUERY form.

6. Enter a From and To value

The From and To text boxes are the low and high range of whatever Key you selected. For example, if you selected 00 as the key, the From text box would be the lowest employee number to include and the To text box would be the highest employee number to include.

7. Enter a From date

Enter a from date to search for approved absences.

8. Enter a To date

Enter an ending date for the search.

9. Select an absence type

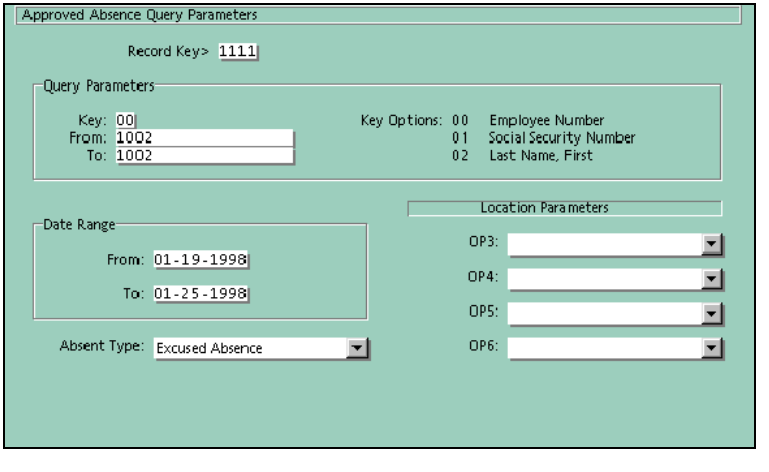
Optionally, enter an absence type for the search. If this text box is left blank, all absence types will be included.

10. Select Organization Level options

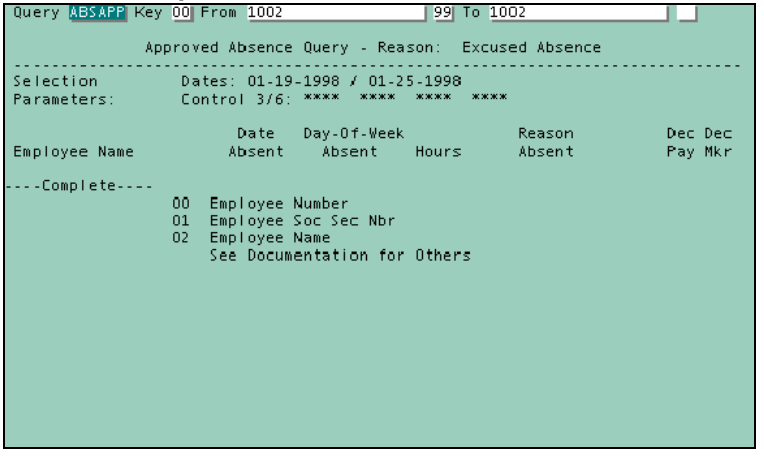
The Location Parameters Organizations 3 through 6 correspond to the Organizations 3 through 6 as assigned on the Employee Information or Payroll Home Location/Pay Allocations forms.

If any or all of these text boxes are populated on the Absent Query Parameters query, only employees with matching codes will be included in the query.

Note: If any or all of these text boxes are populated on the APPROV form, only employees with matching codes will be included in the query.



11. Click Save or press Enter



See also:

■ **Tracking Employee Absences** *(on page 233)*

For a more explanation on when to use this query.

Badge Assignment Deletion query (DELTAB) (test data only)

The Badge Assignment Deletion query (DELTAB) is used to delete badge number assignments made on the Badge Number Assignments form (TABSCR). This query may be used online or in batch using the Query program.

Note: *This query is provided to delete test data used in the implementation, before you go live with your system. It is not meant to be used on a regular basis in a live environment.*

Note: *Whenever this query is used, you must also use the Badge Number Alternate Key Deletion Query program.*

There are two ways to use Badge Assignment Deletion query:

1. Delete the badge number for one employee in an Organization.
2. Delete badge numbers for a range of employees in an Organization.

Option 1: How to delete one employee's badge assignment

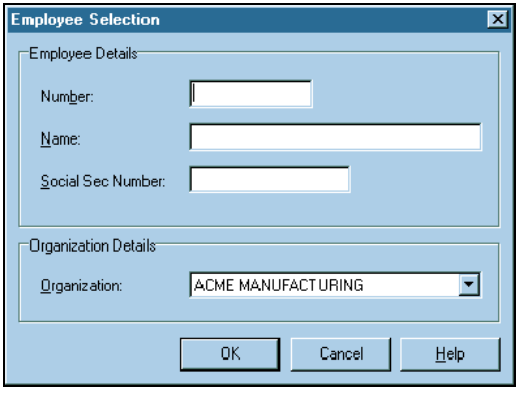
1. Access the Badge Assignment Deletion form (DELTAB)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Delete Badges

2. Enter a Number

Enter an employee number.



3. Click OK or press Enter

The following messages is displayed:

–Complete–

Option 2: How to delete badge assignments for a range of employees

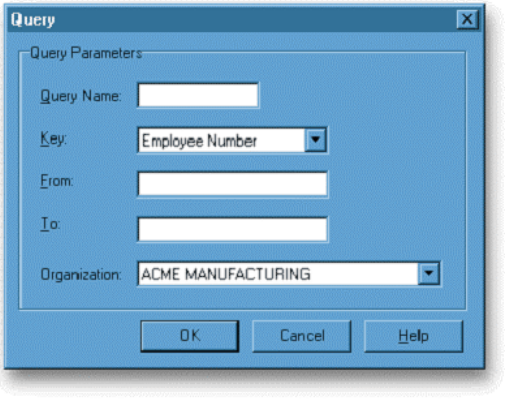
1. Select the Organization

Ensure that you have selected the correct Organization.

2. Access the Query program

Access this form by making the following selection from the navigator:

Component: User Tools
Process: User Tools
Task: Run a Query



3. Enter the Query name

Enter DELTAB in the Query name text box.

4. Enter the Key type

The Key text box specifies which key information to use.

Select the Employee Number in the Key text box.

5. Enter the From number

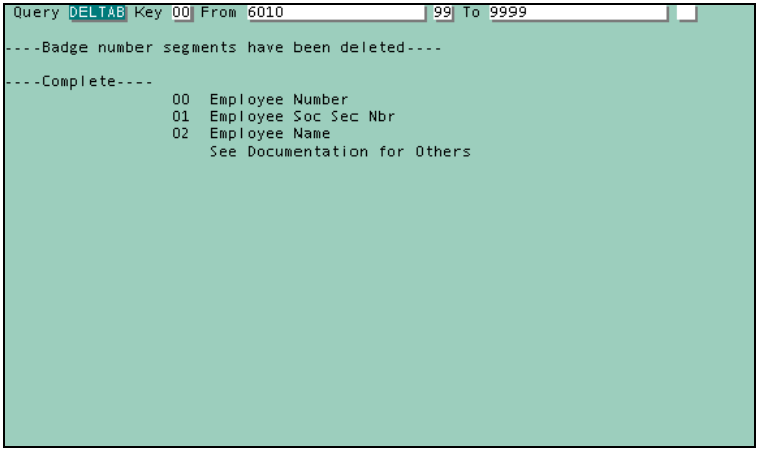
Enter an Employee Number at the beginning of the range from which you want to delete badge assignments.

6. Enter the To number

Enter an Employee Number at the end of the range from which you want to delete badge assignments.

7. Click OK or press Enter

All badge number assignments are deleted for the employees within the Organization and range specified.



See also:

- Badge Number Alternate Key Deletion query (DEL-TN) (test data only) ***(on page 506)***

For an explanation deleting Alternate Key records using the Badge Number Alternate Key Deletion Query.

- **Setting Up and Maintaining Employee Badge Details *(on page 185)***

For more information on the Badge Number Assignments form.

Badge Number Alternate Key Deletion query (DEL-TN) (test data only)

The Badge Number Alternate Key Deletion query program (DEL-TN) is used to delete all badge number Alternate Key records created by the badge assignment process, for all Organizations on the system. This program may be used online or in batch using the Query program.

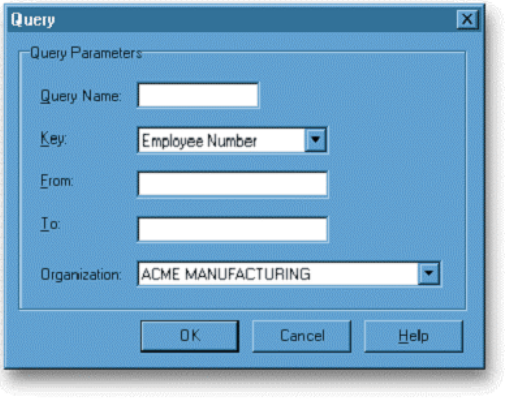
Note: *The Badge Number Alternate Key Deletion query (DEL-TN) is provided to delete test data used in the implementation, before you go live with your system. It is not meant to be used on a regular basis in a live environment.*

Whenever this query is used, you must also use the Badge Assignment Deletion query (DELTAB).

1. Access the QUERY program

Access this form by making the following selection from the navigator:

Component: User Tools
Process: User Tools
Task: Run a Query



2. Enter the Query name

Enter DEL-TN in the Query name text box.

3. Enter the Key type

The Alternate Key text box specifies which key information to use.

Select the Employee Number in the Key text box.

4. Enter the From number

Enter an Employee Number that is at the beginning of the range you want to delete.

5. Enter the To number

Enter an Employee Number that is at the end of the range you want to delete.

6. Click OK or press Enter

Badge alternate keys are deleted for employees within the specified range for all Organizations.

See also:

- Building Alternate Key query (KEY-TN ***(see "Building Alternate Key query (KEY-TN)" on page 508))***

For an explanation of how to build alternate Keys.

- Badge Assignment Deletion query (DELTAB) (test data only) ***(on page 503)***

For an explanation of the Badge Assignment Deletion query.

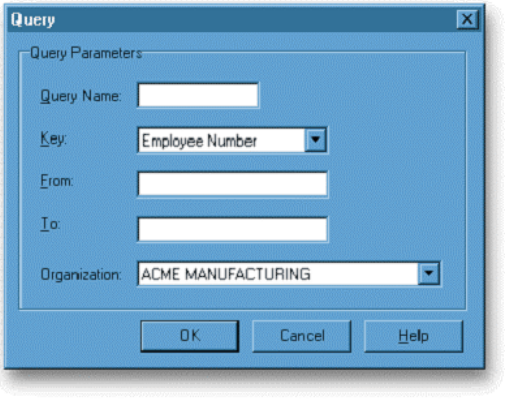
Building Alternate Key query (KEY-TN)

The Build Alternate Key query (KEY-TN) is used to build badge number Alternate Keys for an Organization.

1. Access the QUERY program

Access this form by making the following selection from the navigator:

Component: User Tools
Process: User Tools
Task: Run a Query



2. Enter the Query name

Enter KEY-TN in the Query name text box.

3. Select the Key type

The Alternate Key text box specifies which key information to use.

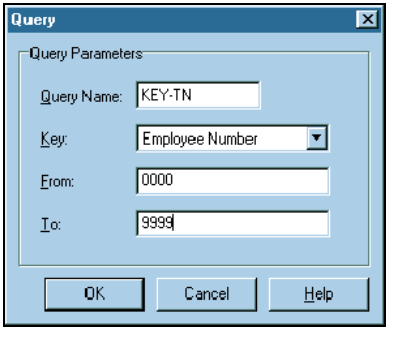
Select the Employee Number in the Key text box.

4. Enter the From number

Enter an Employee Number at the beginning of the range for which you want to build alternate keys.

5. Enter the To number

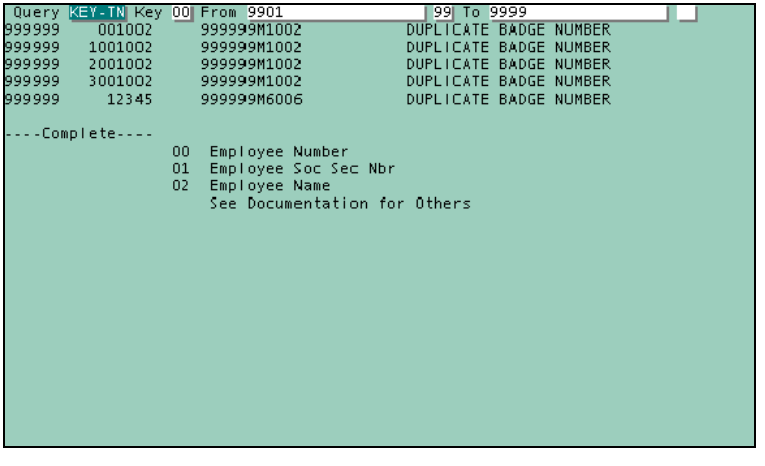
Enter an Employee Number at the end of the range for which you want to build alternate keys.



6. Click OK or press Enter

The following message is displayed:

—Complete—



See also:

■ Badge Number Alternate Key Deletion query (DEL-TN) (test data only) ***(on page 506)***
For an explanation deleting Alternate Key records using the Badge Number Alternate Key Deletion Query.

Delete Ring Record Utility form (RNGCLR)

The Ring Deletion form (RNGCLR) is used to delete specific clock transactions (rings) for an employee based on the date and time.

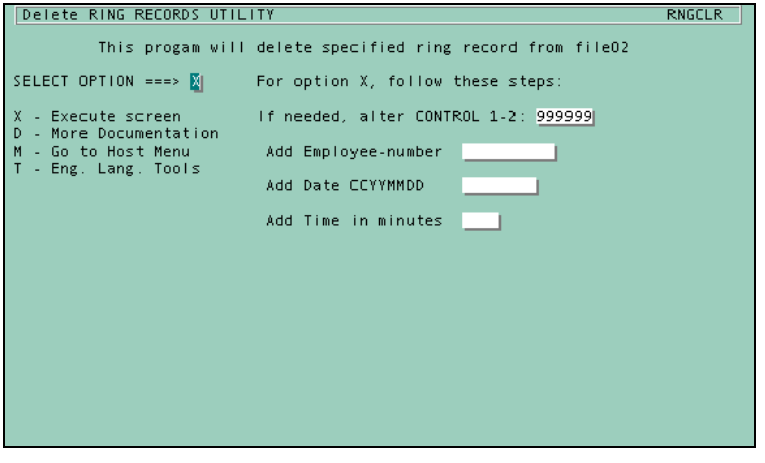
1. Access the Delete Ring Record Utility form (RNGCLR)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Delete Rings by Employee

2. Enter an Organization

Enter the Organization that you want to query.



3. Add Employee-number

Enter an Employee Number in the Add Employee number text box.

Note: *The Add Employee number text box must be populated with the employee number for the clock transactions (rings) to delete.*

If the clock transaction (ring) is marked as a Badge Error, the Add Employee number text box should be populated with the badge number of the bad clock transaction (ring).

4. Add Date

The date must be entered in CCYYMMDD format.

5. Add Time in minutes (optional)

To delete a specific clock transaction (ring), enter the time in number of minutes from midnight. If time is not entered, all clock transactions (rings) for the employee on the date specified will be deleted.

For example

Actual time is 08:35

8 x 60 = 480

480 + 35 = 515

In this example you would enter 0515 in Additional Key Text box after the date.

6. Click Save or press Enter

The following messages is displayed:

—Complete—

Delete Rings from Employee Database form (DELRNG) (test data only)

The Delete All Ring Data query (DELRNG) deletes clock transactions (rings) from Employee Database by organization and date. This includes valid clock transactions (rings) and clock transactions (rings) in error.

Note: This query is intended for use during installation and implementation when something goes wrong and you want to purge everything and start over. It is not meant to be used on a regular basis in a live environment.

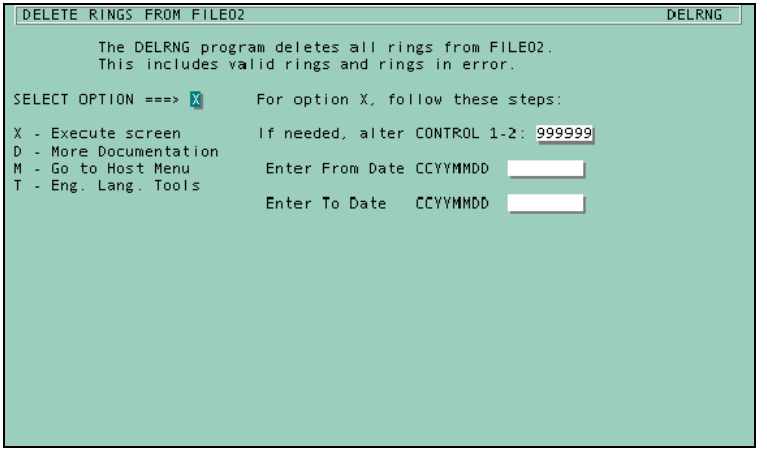
1. Access the Delete Rings from Employee Database form (DELRNG)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Global Ring Deletion

2. Enter an Organization

Enter the Organization that you want to query.



3. Enter From Date

Enter starting date for the clock transactions (rings) you want to delete.

4. Enter To Date

Enter the ending date for the clock transactions (rings) you want to delete.

5. Click Save or press Enter

All clock transactions (rings) for the specified Organization with a date that fall into the specified date range are deleted.

The following message is displayed.

—COMPLETE —

Denied Absences query (DENIED)

The Denied Absence query (DENIED) allows you to view online all denied absences or a specified type of denied absence for selected employees. This is then used to verify proper assignment of absent hours.

You can specify an Absent Type on which to report or, by not specifying an Absent Type, report on all denied absences. The query can also be used to determine trends of specific types of absences.

Note: *Absences are considered denied if the absent approval code for the record begins with a "D".*

> **Running online**
>
> Although the Denied Absence query is designed as a query program it has its own parameters selection form that, besides allowing you to specify a date range, absence type and employee organization levels to be included, allows you to activate the program without going to an additional Query Parameters form.

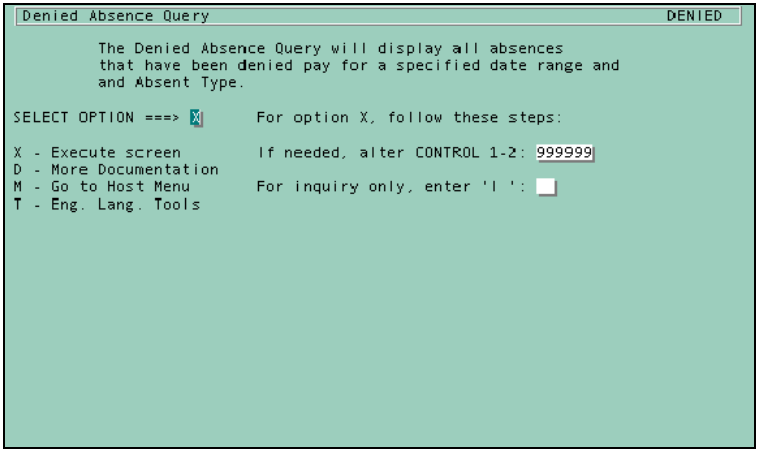
1. Access the Denied Absences query (DENIED)

Access this form by making the following selection from the navigator:

Component: Employee Resourcing
Process: Manage Employee Attendance
Task: Query Denied-Pay Absences

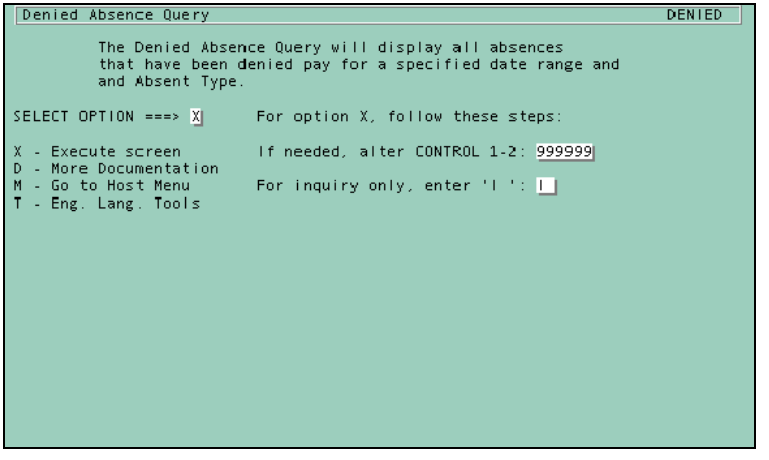
2. Enter an Organization

Enter the Organization that you want to query.



3. For inquiry only, enter 'I'

To access this text box in inquiry mode, enter 'I' in this text box.



4. Click Execute form button or press Enter

The Denied Absence Query Parameters Entry form is displayed.

5. Enter a Record Key

Enter a four-character key to establish a table record of DENIED parameters. The next time you use the query, you can access this same table record and not have to reenter all of the same parameters.

6. Enter a Key Type

Note: The text boxes in the Query Parameters group box work in the same way as the same text boxes on the QUERY form.

7. Enter a From and To value

The From and To text boxes are the low and high range of whatever Key you selected. For example, if you selected 00 as the key, the From text box would be the lowest employee number to include and the To text box would be the highest employee number to include.

8. Enter a From date

Enter a beginning date for the search for denied absences.

9. Enter a To date

Enter an ending date for the search.

10. Select an absence type (optional)

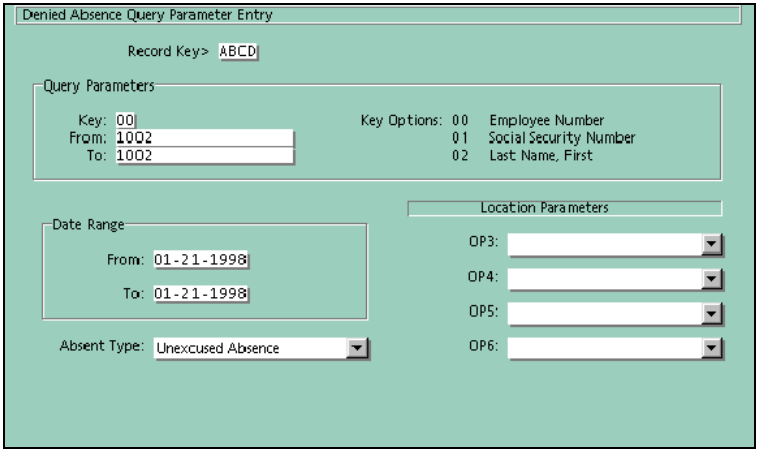
Enter an absence type for the search. If this text box is left blank, all absence type will be included.

11. Select Organization Level options

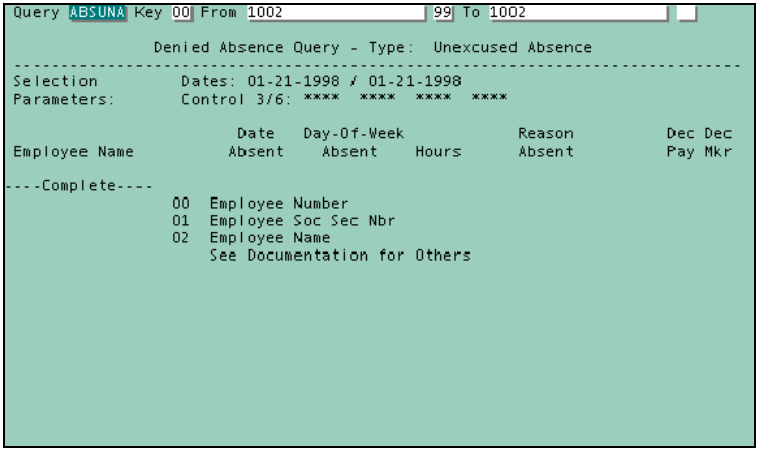
The Location Parameters Organizations 3 through 6 correspond to the Organizations 3 through 6 as assigned on the Employee Information or Payroll Home Location/Pay Allocations forms.

If any or all of these text boxes are populated on the Absent Query Parameters query, only employees with matching codes will be included in the query.

Note: If any or all of these text boxes are populated on the Denied form, only employees with matching codes will be included in the query.



12. Click Save or press Enter



See also:

■ **Tracking Employee Absences** *(on page 233)*

For a more explanation on when to use this query.

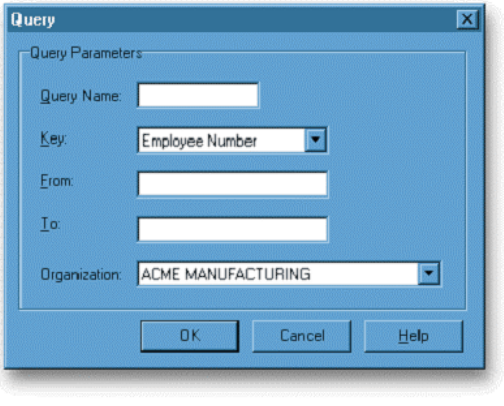
Group Schedule Display query (SCHEDG)

The Group Schedule Display query (SCHEDG) displays schedule data for employees in an Organization. It provides an online reference to verify basic employee data, without having to execute and print a report.

1. Access the QUERY program

Access this form by making the following selection from the navigator:

Component: User Tools
Process: User Tools
Task: Run a Query



2. Enter the Query name

Enter SCHEDG in the Query name text box.

3. Select the Key type

The Alternate Key text box specifies which key information to use.

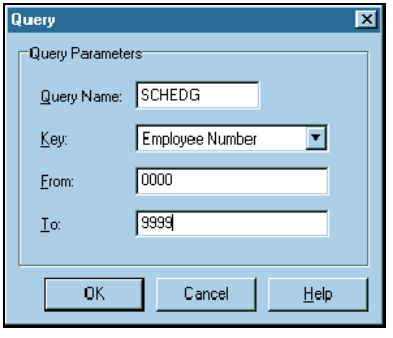
Select the Employee Number in the Key text box.

4. Enter the From number

Enter the Employee Number at the beginning of the range you want to search.

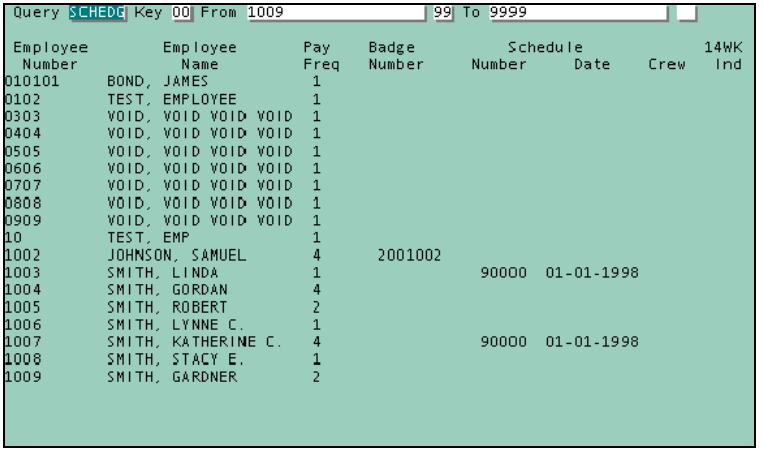
5. Enter the To number

Enter the Employee Number at the end of the range you want to search.



6. Click OK or press Enter

The schedule data is displayed.



See also:

- **Assigning Employees to Time and Attendance** ***(on page 205)***

For a more explanation on when to use this query.

Raw Ring Display (RING01)

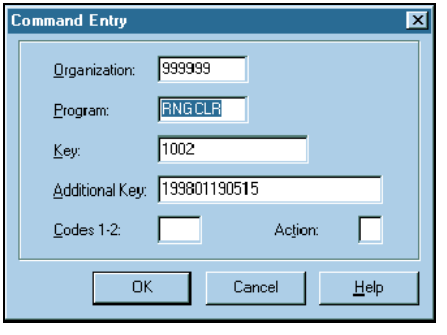
The Raw Ring Display program (RING01) displays in Inquiry mode all clock transactions (rings) in a Ring Transaction file (FILE05).

Note: *The Displaying clock transaction data (ring) is used online on the PC, but must be executed as a batch job on a mainframe.*

To use this program on a PC LAN complete the following steps:

1. Access the Command Entry dialog box

Access the Command Entry dialog box using Ctrl + O.



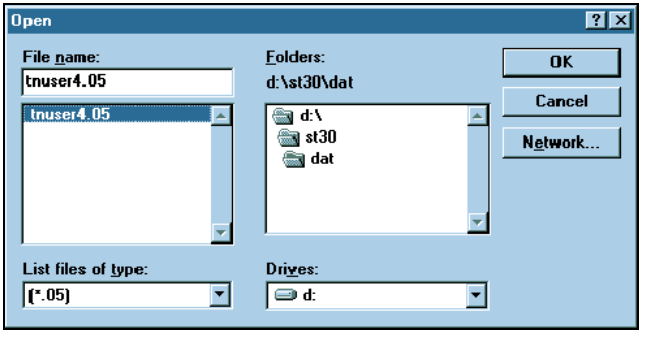
2. Enter a Form name

Enter RING01 in the Form text box.

3. Click OK or press Enter

4. Select a FILE05

Use the Open dialog box to find and select a FILE05.



5. Click OK or press Enter

The data is displayed online.

6. Click OK or press Enter

To display all clock transactions (rings) keep clicking on OK, or keep pressing Enter until the following messages is displayed.

—COMPLETE—

The files used in this run are:

Input Files:	FILE01 System Control Repository FILE02 Employee Database FILE04 Control Record (Command Line) FILE05 Rings File
Output Files:	FILE03 Rings Listing
Execute:	CBSVB

When executing a batch job on the mainframe, you must enter parameters on a Control Record (FILE04) instead of using the Command Line.

The Control Record needed for a mainframe batch run requires one record. Here is an example:

```
         1         2         3         4         5
....5....0....5....0....5....0....5....0....5....0....5
P RING01J00100 999999RING01
```

Roster of Employees query (ROSTER)

The Roster of Employees Query program (ROSTER) provides an online listing of selected employees and their clock in date and time, or a reason if there is no clock-in information.

This query allows you to specify a date range, a time range, and a number of hours outside the specified from and to times (Out of Bounds) to be included in the search parameters on which to report.

This query can be used as an online alternative to the Time and Attendance Roster Report to verify attendance within a range of a few minutes to a few hours at the start of a new shift.

Running online

The Online Roster of Employees query has its own parameters selection form that allows you to enter selection criteria and activate the program. This form allows you to specify a date range, time range, out-of-bounds time, schedule number, and employee organization levels to be included in the process.

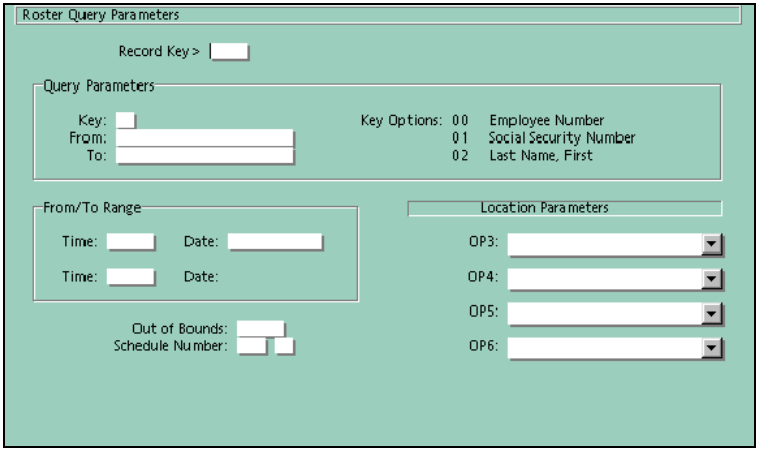
Note: The Roster of Employees query is most effective when run shortly after the scheduled start time to display employees who have clocked in. It can also be run at later times to check employee attendance.

Note: You must enter a value in one of the following text boxes From/To Range Time or Schedule Number, including Sub-Schedule Number.

1. Access the ABSENT query

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Online Queries
Task: Roster Pres/Absent Employee



2. Enter a Record Key

Enter a four-character key to establish a table record of ROSTER parameters. The next time you use the query, you can access this same table record and not have to reenter all of the same parameters.

3. Enter a Key Type

Note: The text boxes in the Query Parameters group box work in the same way as the same text boxes on the QUERY form.

4. Enter a From and To value

The From and To text boxes are the low and high range of whatever Key you selected. For example, if you selected 00 as the key, the From text box would be the lowest employee number to include and the To text box would be the highest employee number to include.

5. Enter a From time

Enter the beginning time for which to search for clock transactions (rings).

6. Enter a From date

Enter the beginning date to search for clock transactions (rings).

7. Enter To time

Enter an ending time for the search.

8. Enter a To date

Enter the ending date for the search.

9. Enter an Out of Bounds value (optional)

The optional Out of Bounds time text box is used to broaden the search parameters. The time entered in this text box is subtracted from the From time to determine an early out-of-bounds and added to the To time to determine a late out-of- bounds.

Employees who meet the following criteria are displayed with the message OUT-OF-BOUNDS or UNSCHED-BOUNDS, depending on whether or not they are scheduled to work on the date selected:

- Clock transactions (rings) between the early Out of Bounds time and From Time
- Clock transactions (rings) between the To time and the late Out of Bounds time

Employees with no clock transactions (rings) between the two out-of-bounds times are listed as absent.

Note: If Out of Bounds text box is left blank, no out-of-bounds time is calculated.

10. Enter a Schedule Number

Use this text box to select employees by schedule assignment. If you do not enter a value in the Sub-Schedules text box, all the employees assigned to any Sub-Schedules for that Schedule will be included.

If an entry is made in the first Schedule Number text box or both of these text boxes, the search parameters for clock transaction (ring) information will be the Schedule's Start Early Reject time through End Late Reject time defined on the Schedule Activities form (ST2SCR).

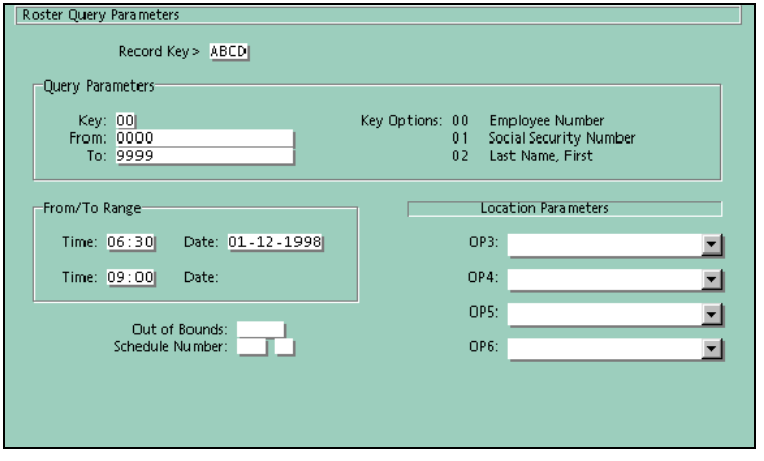
If no schedule number is entered on the form, the From time and To time values are used, along with the Location Parameters options, to specify the search parameters.

Employees without clock transactions (rings) during this time frame are identified as ABSENT if their Type of Day as defined on the Type of Day Assignment form specifies that they should be present, and UNSCHED-ABSENT if they are not scheduled to work.

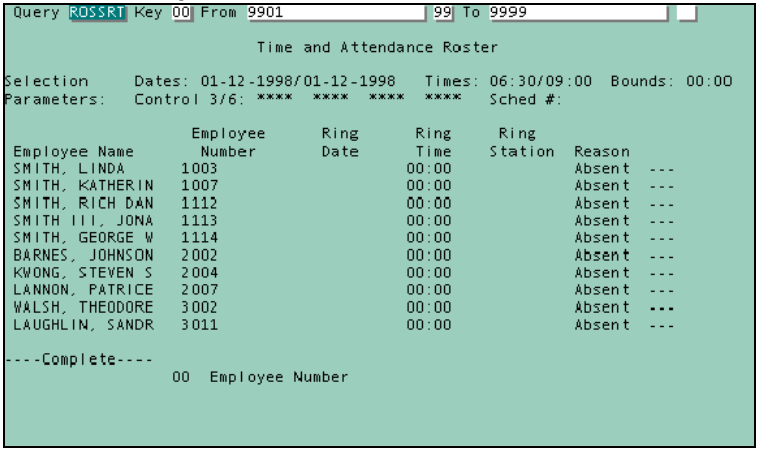
11. Select Organization Level options

The Location Parameters Organizations 3 through 6 correspond to the Organizations 3 through 6 as assigned on the Employee Information (EF-SCR) or Payroll Home Location/Pay Allocations (GG-SCR) forms.

If any or all of these text boxes are populated on the ROSTER form, only employees with matching codes will be included in the query.



12. Click Save or press Enter



See also:

- **Tracking Employee Absences** *(on page 233)*

For a more explanation on when to use this query.

- **Roster Report (61-RPT** *(see "Roster Report (61-RPT)" on page 382)***)**

For more information on the Roster Report (61-RPT).

Schedule Assignment Deletion form (DELTAS)

The Schedule Assignment Deletion form (DELTAS) is used to delete schedule assignments. The program can be used in two ways:

1. To delete an assignment for one employee
2. As a Query, to delete assignments for a group of employees

Note: *Before you can use the Schedule Assignment Deletion as a Query, you must use the Schedule Assignment Deletion Parameters form. The correct sequence of steps is documented in Option 2.*

Option 1: Delete a schedule assignment for an individual employee

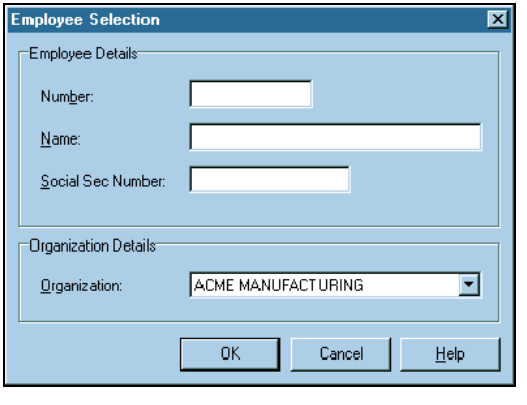
1. Access the Schedule Assignment Deletion form (DELTAS)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Delete Sched Assignment

2. Enter a Number

Enter an employee number.

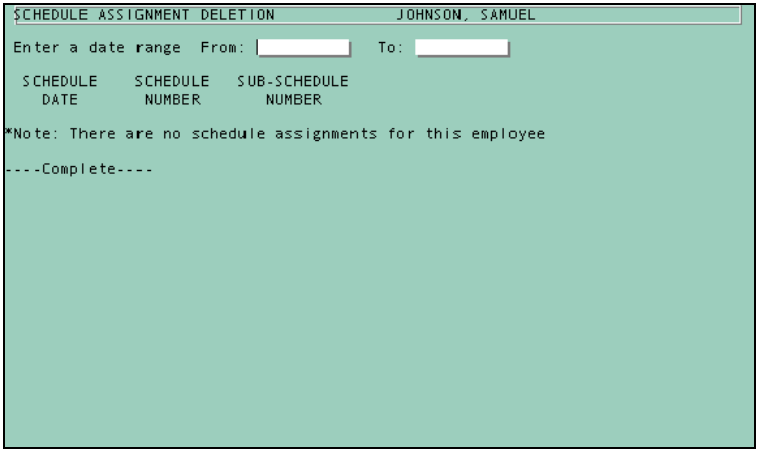


3. Click OK or press Enter

4. Enter a From and To date range

Select the schedule from which you want to delete the employee by entering a date range within which the schedule occurs.

The To and From text boxes allow you to enter a date range within which the schedule occurs. Dates must be entered in CCYYMMDD or MM-DD-CCYY format.



5. Click Save or press Enter

Your SCHEDA Query program is processed, and the following message is displayed.

—Note: 1 Schedule Assignment segments have been deleted—

Option 2: Delete a schedule assignment for a group of employees

The Schedule Assignment Deletion Parameters form is used to define parameters for deleting expired or invalid schedule assignments from the employee Schedule Assignments form.

These selection parameters are stored, and used by the Schedule Assignment Deletion Query program. This query is used to delete schedule assignments. It deletes the Schedule Assignments, using the employee range entered in the 'From' and 'To' text boxes.

On the Schedule Assignment Deletion Parameters form (TASSEL) there are two selection types:

- Date range
- Selection routine (Optional)

Note: *You may use the Schedule Assignment Deletion query without entering selection parameters in the form. If you do this, you must be aware that you are then deleting all Schedule Assignments, for all employee numbers that you enter in the 'From' and 'To' range on the Schedule Assignment Deletion query form.*

1. Access the Schedule Assignment Deletion Parameters form (TASSEL)

Access this table by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Sched Delete Parameters

2. Enter a 'From' and 'To' date range

Select that schedule you want to delete by entering a date range within which the schedule occurs.

The To and From text boxes allow you to enter a date range within which the schedule occurs. Dates must be entered in CCYYMMDD or MM-DD-CCYY format.

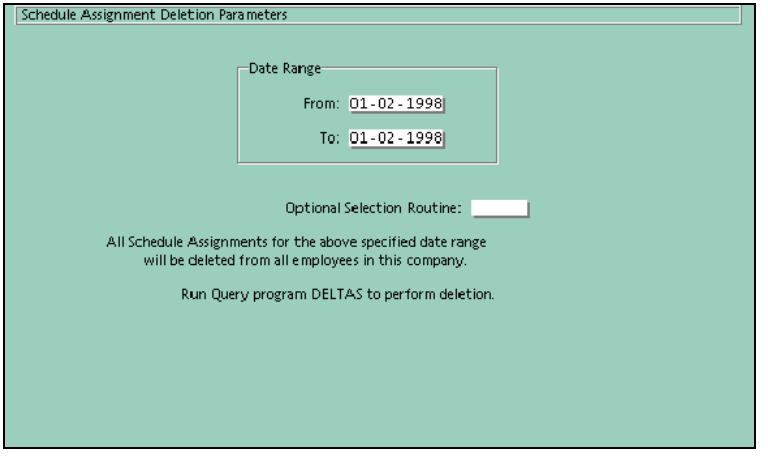
3. Enter a Selection Routine (Optional)

If you have created a selection routine, enter the name of the routine.

Note: *Cyborg does not deliver selection routines. This text box is for a user created program that selects employees based on user-defined criteria. If created, the program name must begin with an X, for example 'XDEPT'. If you have not created a selection routine, simply leave this text box blank.*

4. Click Save or press Enter

Your Schedule Assignment Deletion Parameters form is saved.



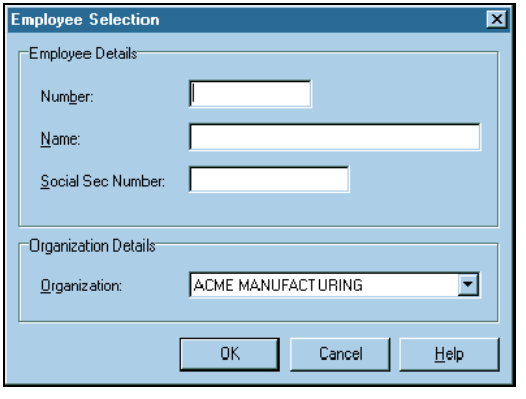
5. Access the Schedule Assignment Deletion form (DELTAS)

Access this form by making the following selection from the navigator:

Component: Time and Attendance
Process: Utilities
Task: Delete Sched Assignment

6. Enter a Number

Enter an employee number.



7. Click OK or press Enter

8. Enter a From and To date range

Select the schedule from which you want to delete the employee, by entering a date range within which the schedule occurs.

The To and From text boxes allow you to enter a date range within which the schedule occurs. Dates must be entered in CCYYMMDD or MM-DD-CCYY format.

9. Click OK or press Enter

The following messages is displayed:

—Complete—

See also:

- **Deleting employee schedule assignments** *(on page 224)*

For an explanation on how to delete individual employees using the Schedule Assignments form.

Shift Premium Translation form (SPTRAN)

The Shift Premium Translation form (SPTRAN) is used to translate category code 06 shift premiums into the corresponding HED and earned hours, from FILE10 time entry data.

The Shift Premium Translation form (SPTRAN) may only be used after the Employee Time Entry Inquiry form (TCUTIL) has created FILE10 time entry output.

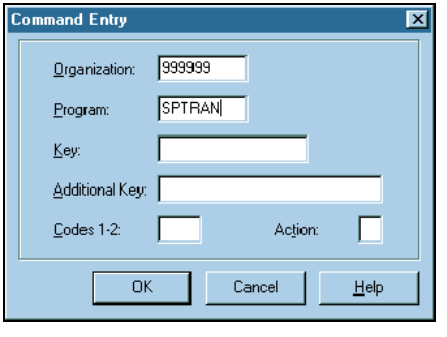
Note: *The Shift Premium Translation form is used online on the PC, but must be executed as a batch job on a mainframe.*

Your FILE10 output From Employee Time Entry Inquiry form typically contains hours earned with a shift code if differential is eligible for those hours. The Shift Premium Translation program allows you to convert the shift code to hours and HED, and create an additional FILE10 of translated time entries.

To use this program on a PC LAN complete the following steps:

1. Access the Command Entry dialog box

Access the Command Entry dialog box using Ctrl + O.



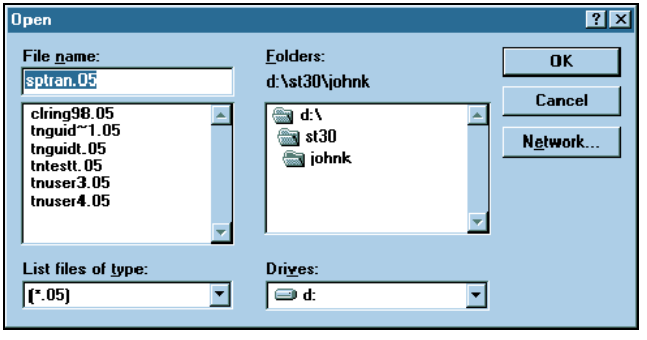
2. Enter a Form name

Enter SPTRAN in the Form text box.

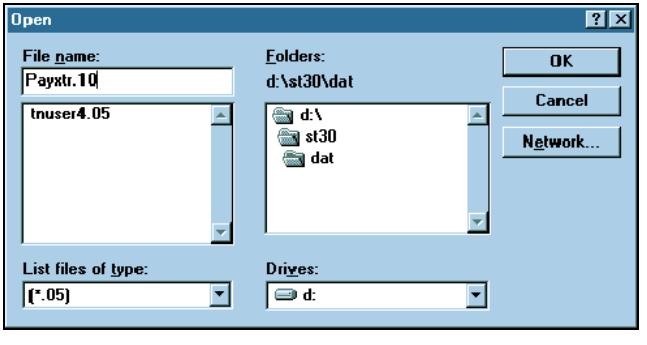
3. Click OK or press Enter

4. Select your Employee Time Entry Inquiry form

Use the Open dialog box to select your Employee Time Entry Inquiry form output.



To do this, type over the filename SPTRAN.05 with the name of your FILE05 containing your Employee Time Entry Inquiry form output.



5. Click OK or press Enter

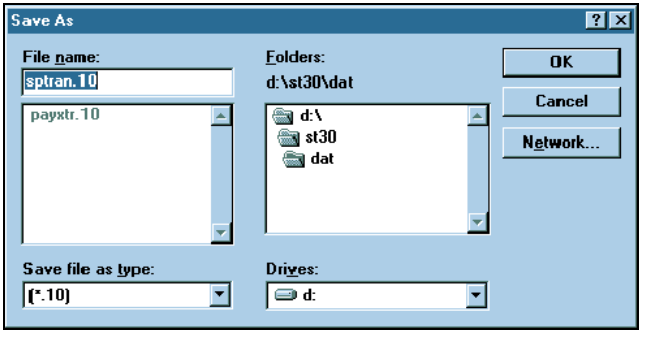
6. Enter a file name, and select the directory where you want to save the file to

Note: For time entries that will be transmitted to an EBCDIC mainframe, an adjustment in executing this may be required as follows.

Files created on a PC contain standard ASCII file type records. These records contain Tab and Carriage Return Line Feed characters. To assure that your time entry file contains a clean 80-byte record, you may need to perform one of the following changes:

Type the Filename SPTRAN.10[B] or SPTRAN.10[N] (leave the rest of the message intact). Press Enter.

- [B] creates a Binary file that an EBCDIC machine can read; carriage returns, tabs and line feeds are deleted.
- [N] creates a Binary file with only tabs deleted.



7. Click OK or press Enter

The following message is displayed:

—Complete—

Notes on PC execution

After using the Shift Premium Translation program, your directory contains both a FILE05 of time entries in their original form (created from Employee Time Entry Inquiry form process) and a FILE10 of translated time entries. Either of these time entry files may be used as input for reports that utilize the time entry data. Under certain circumstances, you may wish to use the SPTRAN FILE10 as input to your payroll, instead of the TCUTIL FILE05.

Mainframe execution

When executing a batch job on the mainframe, you must enter parameters on a Control Record (FILE04) instead of using the Command Line.

Control Record

The Control Record needed for a mainframe batch run simply requires the program name SPTRAN in the program text box.

```
.........1    1    2    2    3//  5    6    6    7    7
1....5....0....5....0....5....0//..5....0....5....0....5
P SPTRANJ00100  999999SPTRAN
```

Notes on mainframe execution

After completing the Shift Premium Translation execution, you now have both a FILE10 of time entries (from the Employee Time Entry Inquiry form process) and a FILE10 of translated time entries from the Shift Premium Translation process. Either of these time entry files may be used as input for reports that utilize the time entry data. Under certain circumstances, you may also wish to substitute the SPTRAN FILE10 as your payroll input.

APPENDIX D

Practice and Review Answers

In This Appendix

Introduction

This section provides answers for the Apply the Concept practices, as well as the Extended Practice and Review of Questions Answered that are included at the end of each instructional chapter.

Getting Started with Time and Attendance

Apply the Concept

1. What are the different Organization Levels that will exist in your organization?

   This answer will be specific to your organization.

2. What overtime factors will you use in your organization?

   This answer will be specific to your organization.

Review of Questions Answered

1. What information do I need to establish a company?

   Organization number

   Name of Company

   Address Details

   Identify the organization structure

2. What are Organization Levels and how are they used?

   Organization Levels are used to identify an organizations structure to Time and Attendance Administration. For example:

Organization Level	Description
1	Corporation
2	Division
3	Region
4	Department
5	Section
6	Group

3. What is an employee status used for?

   An employee's status is used when generating time entries from paid absences.

4. Which earning codes (HEDs) are supplied with the system?

HED Number	Description
001	Regular Pay
002	Future Raise
003	Overtime Pay

Implementing Time and Attendance Administration

Apply the Concept

1. Describe your organization's current method of enforcing attendance rules and indicate how Time and Attendance Administration tables can be used to automate this.

   This answer will be specific to your organization.

2. Identify which crews in your organization are currently receiving Shift Premium allowances. Determine which hours during these shifts will be eligible for shift premium payments.

   This answer will be specific to your organization.

Review of Questions Answered

1. What is a Calendar Routine?

   A Calendar Routine is used to define payment rules for groups of employees in your organization. The Calendar Routine establishes:

   - Your organization's statutory and non-statutory holidays.

   - Payment rules for:

   Regular working days—typically Monday through Friday.

   Special working days—typically Saturday and Sunday.

   Employees who work on company holidays.

   By establishing these rules you are able to control how payments are calculated and how time entries are generated.

   A Calendar Routine is a name used to collectively describe the following:

   - TNCLxx program

   - Holiday Assignment table (HOLIDAY)

   - Type Of Holiday Assignment table

   - Type Of Day Assignment table

2. How do I define payment rules for working holidays?

   The Holiday Assignment table (HOLIDAY) is used to define global holidays for employees, or groups of employees, in your organization. Global holidays are defined as statutory holidays and any holidays to which groups of employees may be entitled, such as union days.

The Type Of Holiday Assignment table (TYPEHL) is used to define what payment an employee will receive if he or she works on a day that has been defined as a holiday in the Holiday Assignment table (HOLIDAY).

3. How do I define payment rules for working on non-working days?

   The Type Of Day Assignment table (TYPEHL) is used to determine what type of payment is made when an employee works on a particular working, typically Monday to Friday, and for non-working days (typically Saturday and Sunday). For each of these days of the week, you must select a Type of Day code. When you have selected the Type of Day codes you must then define a HED for it using the Earnings Code table.

4. How do I define payment rules for working days?

   The Type Of Day Assignment table (TYPEDA) is used to determine what type of payment is made when an employee works on a particular working day, typically Monday to Friday. For each of these days you must select a Type of Day code. When you have selected the Type of Day codes you must then define a HED for it using the Earnings Code table.

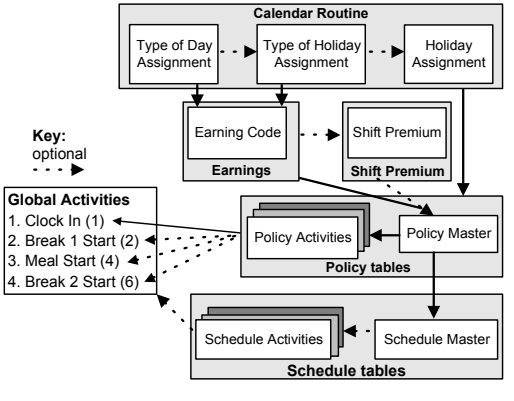
5. What is the relationship between Type of Day codes and HEDs?

   When you have defined the different payment rules using the Type Of Day Assignment table (TYPEDA) or the Type Of Holiday Assignment table (TYPEHL), you must associate the different Type of Day codes you have selected in these tables with HEDs using the Earnings Code table.

6. How are Shift Premiums used?

   A Shift Premium is a supplementary allowance that can be paid for working unsociable hours or for performing hazardous work. Shift Premiums are set up on the Shift Premium table (SP-SCR).

7. What is the relationship between Calendar Routines, Policies, and Schedules?



Policy tables, which are the highest-level tables, are used to record the generic (or master) rules for the company or for a group of employees. Each policy consists of a Policy Master table and one or more Policy Activities table (PT2SCR).

When you create a Calendar Routine, an Earnings Code table, and a Shift Premium table, you give each of them a unique table identifier.

Calendar Routine

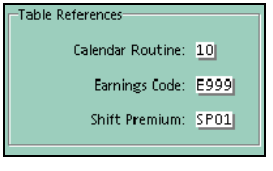
Earnings Code

Shift Premium

To associate the Policy Master table (PT1SCR) with the values held in these tables, you enter their unique identifiers.

When Time and Attendance Administration processes the Policy Master table (PT1SCR), it then uses these identifiers to reference the data contained in these tables.

The following diagram shows the group box on the Policy Master table where you enter the unique identifiers for each table.



Policy Number and Sub-Policy Number

The Policy Master table has its own unique identifiers, a Policy Number and a Sub-Policy Number. These numbers are referenced by the Policy Activities table and Schedule tables.

A Schedule table is linked to the Policy table by referencing the Policy and Sub-Policy Numbers.

Setting Up Time and Attendance Policies

Apply the Concept

1. Determine how many different types of employees, or groups of employees exist in your organization. Based on this, establish how many different types of Policy Master tables you will need to create. Use the table below to record your answer.

   This answer will be specific to your organization.

2. Identify what the Grace and Round values will be for the different activities you have identified.

   This answer will be specific to your organization.

3. Identify which activities you will need to set up for the different Policy Master tables.

   This answer will be specific to your organization.

4. Choose one of the activities, and determine what the Warning and Reject values would be for the different conditions.

   This answer will be specific to your organization.

Review of Questions Answered

1. Why use Deduct Minimum?

   The Deduct Minimum feature enables you to determine the minimum number of hours an employee must work before the automatic deduction is made.

2. Why are Punch Types used?

   Punch Types determine whether or not an employee needs to swipe a badge reader at the start and end of an activity. The Punch Type options are:

   None

   Need Not Punch

   Optional Minimum

   Optional Punch

   Required Minimum

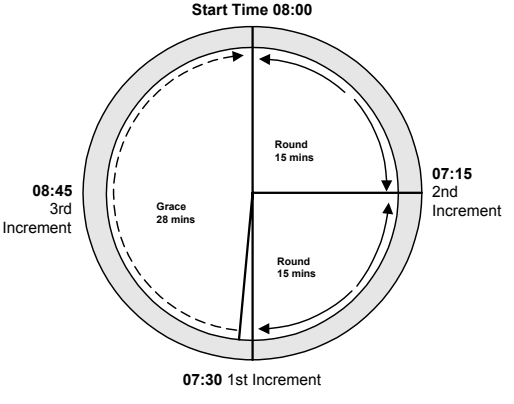
   Required Punch

3. How are Grace and Round times used?

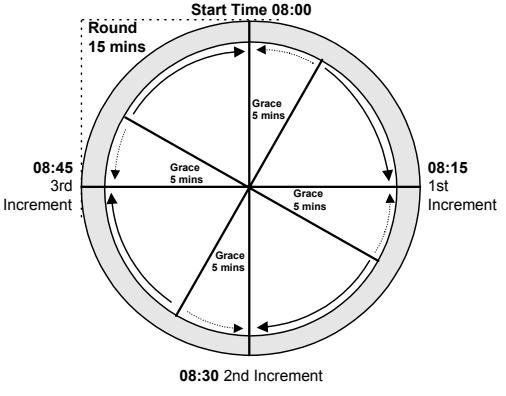
   The Grace and Round values determine paid hours for employees. The values in these text boxes enable the system to determine when to dock or credit an employee's time, based on their clock transaction (ring). The Round time also determines the increments of time that are used in the clock transaction (ring) calculation. Grace and Round values are defined on the Policy Activities table (PT2SCR).

4. What is a One Time Grace Period?

   A One Time Grace Period is a Round Routine option. It means that the Grace period is only in effect before an activity or after an activity. In the following example you can see that the Grace period is only in effect in the 28 minutes before the start time for this activity.



In contract the Grace period for the Standard Round Routine option is in effect for the different time increments, as shown in this example.



5. How are Warning and Reject times used?

   A Warning time is used to set a period of time after which an employee's clock transaction (ring) will be flagged as a warning exception for a particular activity. A warning condition will allow the creation of a time entry. A reject message will not.

   A Reject time is the point at which an error condition will occur. An error condition must be corrected and approved before a time entry can be generated by the system. A warning message will allow the creation of a time entry. A reject message will not.

Setting up Schedules

Apply the Concept

Determine what naming convention your organization could use to name the different Schedules.

This answer will be specific to your organization.

Review of Questions Answered

1. What are Schedule tables and are how are they used?

   A schedule table is a generic name that refers to Schedule Master tables (ST1SCR) and Schedule Activities tables (ST2SCR). These tables are used to define the actual attendance rules that an employee must follow.

2. How are Schedule Master tables (ST1SCR) used?

   Employees are assigned to the Schedule Master table.

   Override values can also be entered in a Schedule Master table to override the generic values that were defined in the associated Policy Master table (ST2SCR).

3. How can you associate Policy Activities tables (PT2SCR) and Schedule Activities tables (ST2SCR)?

   A Schedule Master table is associated with a Policy Master table by referencing the Policy and Sub-Policy number. When this association is made, any Policy Activities table creates the generic values that will be used by the Schedule Activities tables.

4. Why do you need to create a naming convention for Schedules tables?

   If you are planning to use the Crew Rotation Facility for automatic scheduling of rotating shifts, careful planning of Schedule table names is necessary.

   Crew Rotations are used by the Time and Attendance system to assign specific employees to various Schedule tables, according to a specified pattern. In order to easily recall the types of schedules to which your employees are assigned, your schedule names can imply some type of meaning.

5. What impact does changing a Schedule Activities Start Time have on Warning and Reject times?

   If you enter a new Start Time for an activity, the Time and Attendance system will automatically applies changes to the Warning and Reject text boxed based on the original values on the Policy Activities table.

Setting Up Rotation Patterns

Apply the Concept

How might you use crew rotations in your organization?

This answer will be specific to your organization.

Review of Questions Answered

1. What are crew rotations and how do they work?

   The crew rotation facility allows you to rotate employees through different schedule assignments (or shifts) according to a specified pattern. This pattern of employee schedule assignments makes up the employee's schedule. The word 'crew' represents a group of employees who rotate from one schedule assignment (shift) to another, following the rotation pattern.

2. What are rotation patterns and how are they set up?

   A rotation pattern is the arrangement of various shifts to which an employee is assigned. Each shift is identified by a Sub-Schedule Number. The employee 'rotates' through the various shifts that define the pattern.

3. What online utilities and packaged reports are available for viewing and tracking your rotation patterns?

   There are two reports that can be used to view and track rotation patterns.

   Crew Rotation report (CRTABL)—This report lists the crew codes and Sub-Schedule Numbers entered on the Rotation Patterns - 8 Week form.

   Crew Rotation report (CR14TB)—This report lists the crew codes and Sub-Schedule Numbers entered on the Rotation Patterns - 14 Week form.

Setting Up and Maintaining Employee Badge Details

Apply the Concept

If your third party software cannot create badges with the Organization value what conditions must you be aware of?

All clock transactions (rings) contain the default Organization (CYBORG) in positions 17-22.

In the Mag Stripe/Bar Cde text box, on the Company Options form, you select 'Bar Code' (B) for each Organization.

No badge numbers are duplicated for any employees on the Employee Database (FILE02). The Upload Rings program will read the default Organization (CYBORG) on each clock transaction, and then determine which Organization and which employee, the clock transaction belongs to.

Review of Questions Answered

1. What is a badge number and how is it created?

   A badge is issued to each employee who uses it to create time entries by swiping their badge through a badge reader.

2. How are badge numbers used?

   Badge numbers are assigned to employees. Each time an employee uses the badge to create a time entry, the badge number is used to associate the time entry with that employee.

Assigning Employees to Time and Attendance

Apply the Concept

Under what circumstances would your organization be able to use the Global Schedule Assignments form (GSASCR)?

This answer will be specific to your organization.

Review of Questions Answered

1. How do you assign an individual employee to a Schedule Master table (ST1SCR)?

   The Schedule Assignments form (ST2SCR) is used to assign individual employees to a Schedule table.

2. How do you assign groups of employees to a Schedule Master table?

   When you assign a group of employees to Time and Attendance schedules, you must complete a two part processes. First, complete the Global Schedule Assignments form (GSASCR). This form allows you to assign a Schedule Master table to employees with common Organization Level codes. When you have completed this form, then complete the SCHEDA query program. The SCHEDA Query program must be run in order to assign the Schedule table to the employees.

3. How do you check an employees schedule assignments?

   The Schedule Assignment Display form (SCHEDS) displays schedule information for employees in a particular Organization. This form can be used online to verify that employees have been assigned to the correct schedule or to check schedule activity information.

4. How do you check the rotation pattern for a particular crew?

   If an employees is assigned to a crew there will be occasions when you will need to find out what shift a crew is using on a particular date and what shift they will use next. You can use the following two forms to display this information:

   - *Display Sub-Schedule Nbr For Crew 8-Wk form (CRWTST)*
   - *Display Sub-Schedule Nbr For Crew 14-Wk form (C14TST)*

Tracking Employee Absences

Apply the Concept

What types of paid absences will you use in your organization?

This answer will be specific to your organization.

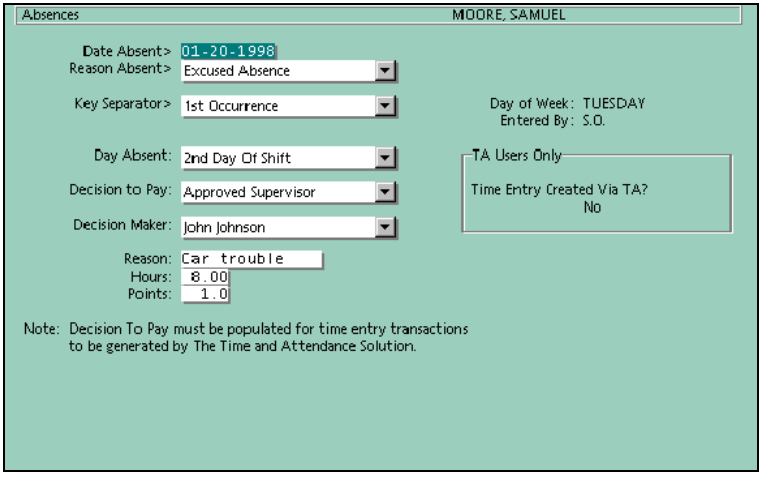
Review of Questions Answered

1. What are the different types of employee absences?

   Time and Attendance Administration processes absences in terms of being paid or unpaid.

2. What choices do you have when recording employee absences?

   The following example shows the Absences form (93-SCR) and the choices you will have to make when you record an employee's absence.



3. What queries and reports are used to track absences?

   The following two tables list the queries and reports that can be used to track absences.

Queries

Query	Descriptions
ABSENT	Lists all scheduled employees who have not clocked in within a specified time range

Query	Descriptions
APPROV	Lists all approved absences for selected employees
DENIED	Lists all denied absences for selected employees
ROSTER	Lists the clock in date and time for selected employees
STATUS	Lists absence information for selected employees
TRACK	Lists the total number of absences for each employee
TYPE	Lists absences by type of absence

☞ *Refer to* **Queries and Maintenance** *(on page 487) for more information on Time and Attendance queries.*

Packaged Reports

Report	Descriptions
Absence Record by Employee - Specified Period (6B2RPT)	Lists employees who have been absent within a range of dates.
Absence Record by Date (6B1RPT)	Lists employees who have been absent in date order.
Absence Record by Employee - Group (6B2RPT)	Lists employees who have been absent in employee number order.
Absence Record by Type (6B3RPT)	Lists employees who have been absent by absence type.
Absence Record Summary (6B4RPT)	Summarizes absences information over a period of time.
Absence Record by Employee - Individual (6B2RPT)	Lists employees who have been absent in employee number order.
Absence Log by Type (6C-RPT)	List employees who have been absent for a specified absence type.
Approved Absence (6N1RPT)	Lists all absences that have been approved for payment.
Paid/Non-paid Absence (6N2RPT)	Lists all absences, grouping paid and non-paid absences.
Absence - Time Entries Generated	Lists all absences that have been approved for payment and indicates if a time entry has been created for each absence.

Report	Descriptions
Unexcused Absence Information (6U1RPT)	Lists all unexcused absences.
Denied Absence (6U2RPT)	Lists all absences that have been denied pay.

Capturing Employee Work Time

Apply the Concept

How often will the RINGS program be run in your organization?

This answer will be specific to your organization.

Review of Questions Answered

1. What is the process that is used to capture employee work time?

   1 .Upload/apply clock transactions (rings) to the Employee Database

   2. Validate clock transactions (rings)

   3. Review/correct clock transactions (rings)

   4. Revalidate clock transactions (rings)

   5. Review/correct clock transactions (rings)

2. What are clock transactions (rings) and how are they used?

   Clock transactions (rings) are records containing the information needed to create time entries for payroll processing. When a badge is swiped through a clock, a clock transaction (ring) is created. Your clock communication software extracts the clock transactions (rings) from the clocks and builds a clock transaction (ring) file(s). The clock transaction (ring) records are applied to the Employee Database, where the clock transactions (rings) are validated, errors are corrected, and time entries can be created.

3. How are clock transactions (rings) validated and why?

   Before time entries can be created using the RINGS program, the clock transaction (ring) records must be checked against the policy and schedule tables to determine which clock transactions (rings) are valid and invalid. The Time Entry Validation/Creation form (TMCARD) is used to validate the clock transactions (rings) based on the policy and schedule tables for each employee.

4. How are errors corrected and why?

   After the clock transactions (rings) have been validated, it is likely that some of the clock transactions (rings) will be invalid because of schedule errors. The invalid clock transactions (rings) are reviewed and corrected before proceeding to creating time entries. This is done using the Error Correction form (TAESCR).

Working with Time Entries

Apply the Concept

Define the term time entry.

A record of the paid hours that an employee has worked. The time entry can be used to feed the payroll process.

Review of Questions Answered

1. Why are time entry extract files created and what are they used for?

   After you have created all of your time entries for a pay period, these time entries must be extracted from the Employee Database into an external file. This time entry extract file will be used to feed the payroll process.

2. Why and how are clock transactions (rings) and time entries deleted?

   Once the time entry processing is complete for the pay period and your time entry extract file has been successfully created, we recommend that the clock transactions (rings) and time entries from the pay period be deleted from the Employee Database. This is done because an accumulation of clock transaction (ring) and time entry records can cause space problems on your Employee Database. The Time Entry Validation/Creation form (TMCARD) is used to delete the clock transaction (ring) records.

Glossary of Terms

.EXE
A binary file containing a program in machine language that is ready to be executed.

.INI
A file that contains the parameters (values) used by the .exe file (program).

360-degree appraisal
Appraisals that include evaluations from an employee's managers and supervisors, peers, subordinates, and even customers, clients, and suppliers.

Absence data
Employee-level absence information that is entered on the absences forms.

Absence point
User-defined number that may be assigned for a particular absence and that can be totaled over time to determine if an employee is within the accepted number of absences for a time period.

Absence type
A classification of an employee absence, such as 'jury duty' or 'sick'. Employee absences are recorded by date and absence type.

Account timeout
The period of time that elapses before a user's account becomes invalid because of inactivity.

Accumulator id
A three-position, alphanumeric identifier for a benefits accumulator.

Acrobat
A suite of programs developed by Adobe Systems, Inc. For creating and distributing electronic documents. Programs in the suite allow you to create a portable document format (PDF) file for a document. You can then distribute the PDF file electronically to people who view the document with their freely distributed acrobat reader. People viewing a PDF file (or document) with the Acrobat Reader see the document with the exact layout intended by the author.

Action button
An action button performs an action such as saving the information you entered or telling the system you finished reviewing a page. An action button consists of an icon (or button) accompanied by underlined text (link text). For example, at various places throughout eCyborg Interactive Workforce you may see an action button displaying a check mark accompanied by the underlined text 'save changes'. You can click either the text or the button to save your changes to the page.

Activity code
Describes the clock transaction (ring) activity, such as clock start or meal end.

Activity types
With the time and attendance solution, you can set up the system so that an employee or group of employees may clock in and out for up to eight different activities: clock-in (1), break 1 start (2), break 1 end (3), meal start (4), meal end (5), break 2 start (6), break 2 end (7), and clock end (8).

Actuarial valuation
An examination of a pension plan to determine if contributions are being accumulated at a rate sufficient to pay the promised pensions.

Administration home page
The administration page that displays when a user logs on using his or her administrator user ID and password. The administration page displays links to individual administrator pages (eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration).

Administrative User ID
User ID created by an administrator with the role of eCyborg Interactive Workforce administrator. This ID

differs from the employee user ID generated for the administrator.

Aggregate tax method

Method of calculating taxes in which year-to-date income is used to project annual wages (using prorating), on which taxes are calculated. With this method, the amount of tax withheld can vary from pay period to pay period. This method is useful in preventing a salesperson from being over withheld as the result of fluctuations in commission over various pay periods. It is activated on the payroll solution by selecting aggregate/cumula tax (9) from the Withholding Method (PR09) option list on the Employee Tax Record Maintenance form. It is also referred to as cumulative tax calculation method.

Annualization

Process of calculating the annual amount of pay based on the number of pay periods and pay period amounts. Calculated by multiplying the number of pay periods in the year by the current taxable wages in the pay period.

Annualization factor

The factor that is used to multiply current pay period wages to determine annual wages. For example, a monthly pay frequency has an annualization factor of 12. The Payroll Solution typically calculates income taxes on the basis of annual wages. The annualization factor is entered by selecting an option from the Annualization (PP33) option list on the Company Pay Frequencies form for each pay frequency.

Annuitant

Someone entitled to receive or currently receiving payments from an annuity.

Annuity

A contract providing an income for a specific period of time.

Applicant

A person who is applying for a job or position in your organization. Internal applicants come from within your organization while external applicants come from outside of your organization.

Appraisal rating

A method of ranking the performance of an employee during a given period using options ranging from 1-outstanding to 5-unsatisfactory.

ASCII

American **S**tandard **C**ode for **I**nformation **I**nterchange. The basis of character sets used in almost all present-day computers; US-ASCII uses only seven bits to convey some control codes, space, numbers, most basic punctuation, and unaccented letters a-z and A-Z.

Ask Me wizard

A natural language, full-text search facility within the online help. This allows users to type in a question, the wizard interprets the question, and displays related topics.

As-of reporting

Ability to report on data for a specified date or date range.

Audit record

A snapshot of information entered on a form. Audit records are stored on the employee database and are displayed on audit reports in an is/was reporting format. Adjustments and time entries are stored as audit records and are extracted for a payroll run in which they update the employee's record.

Audit report

A report that is available after the running of a program; it lists created records as well as error messages for records that could not be created.

Audit trail

A report of changes made to your employee database, such as the Payroll Audit Trail (0101) report.

Authorized absence

Absences that are generally considered as paid time away from regularly scheduled work.

Automatic plan

A plan that has been defined with a default option and default pre- or posttax indicator (also known as core/default plan).

Average deferral percentage
Percentage used in nondiscrimination and compliance testing mandated by US law. The calculation is defined as the contribution divided by the compensation.

Average rating
A rating used for performance appraisal systems with categories weighted by relative importance, where the average score reflects the weighted scores.

Back
Takes the user back to the previous page.

Badge
Time and Attendance Administration can be set up to use two different types of badge readers. The type of badge your organization uses, is determined by your third party badge reader software. The two types of badges are magnetic badges and bar code badges.

Badge error
Occurs when a badge is used to create a clock transaction (ring) and an employee has not been assigned to the badge.

Badge number
Up to ten-character ID stored on employee badges and clock transactions (rings) that tie clock transactions (rings) to an employee on the ***Employee Database*** (on page 562).

Banner
Banner forms separate groupings on forms produced from the Federal, State/Local, and Employee Queues.

Batch
A group of transactions submitted to the batch payroll processing system. Also, a collection of time entries that corresponds to an employee group, such as department.

Batch control record
Precedes all transactions separated by group; used to identify the company to which the transactions in that group apply. By entering anticipated totals for dollars and hours on the batch control record, you may verify your totals against those accumulated by the system.

Batch layout facility
A program that produces a segment layout for loading forms via batch. This was formerly known as BATCHL.

Batch number
An alphanumeric field on the batch control record containing a user-defined value used to identify a unique group of time entries or transactions.

Batch processing
A processing method that runs in the background and requires limited intervention.

Benchmark job
A standard or point of reference for determining total job points.

Beneficiary
A person named by the participant in an insurance or pension plan to receive any benefit provided by the plan if the participant dies.

Benefits control number
A four-position, alphanumeric identifier that specifies which tables are accessed for an organization.

Benefits statement
Report that indicates the coverage and cost of each benefits plan in which an employee participates.

Big option list
A large option list that includes a search facility. This was formerly known as a big codeset.

Bridge loan
A loan made to assist a relocated employee in purchasing a new residence before the sale of their old residence is complete.

Browser
Software application used to locate and display web pages. Modern browsers give users access to graphics, text, and multimedia information, including sound and video.

Budget plan year
A twelve-month period over which a salary budget is effective.

Budget scenario
The result of creating one or more salary plans in order to see the effect of different increase policies on the budget.

Budget setting
The process of analyzing and selecting an organization's salary budget for the coming plan year.

Cafeteria plan
A specific type of flexible benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with flexible benefits plan.

Calculation option list
An option list that contains calculation formula. This was formerly known as a calculation codeset.

Candidate
A person who is applying for a job or position in your organization and is under consideration.

Career planning
Providing career incentives such as advancement and additional education and training for individual employees in order to meet projected organizational needs.

Carrier record
A carrier record supplies information from one application area to another application.

Case-sensitive
A program that distinguishes between uppercase (capital) and lowercase (small) letters. A case-sensitive program that expects you to enter all commands in uppercase will not respond correctly if you enter one or more characters in lowercase.

Catalog
A file (with the extension of .cat) that contains all the information necessary for Impromptu to access and retrieve information from a relational database. The catalog provides a business view of the data, as well as information about what database to access, where the database is stored, and how the tables in the catalog are joined in the datamart.

Category code
General term used to refer to the option selected from category (PP01 and PP02) option lists on the company earnings and company deductions forms. It is used to indicate the type of earning or deduction.

CE/H
Abbreviation for considered earnings/hours.

Change control facility
A facility for updating and comparing your system control repository. This was formerly known as MAINTI/MAINTO.

Check box
A standard windows control that displays a yes/no setting, either checked (yes) or unchecked (no).

Check digit
Unique identifier that is generated by the TBLCHK program and used by the system to check the table relationship records.

Checklist
A list of tasks to be performed in sequence. The checklist displays within the navigator area. Checklists link tasks and other checklists together to perform work flow functions. Users can display a checklist by selecting a checklist icon within the tasks in the navigator.

eCyborg Interactive Workforce specific—a list of tasks/pages generally displayed in a chart with hot spots (links) for the checklist items. The user clicks the link to access the page.

Checklist item
An item appearing within the navigator when a checklist is being displayed. Checklist items include tasks, dialogs and even other checklists.

Checklist item status
Defines the status of a checklist item. These can be:

- Available to perform
- Required
- Not available
- Already completed

Checklist margin
The area of the navigator that displays the checklist item status when a checklist is being displayed.

Checkmark
If in the done column of a eCyborg Interactive Workforce checklist, indicates that an item on a checklist is complete. Can also indicate OK, finished, submit, and so forth.

Class
A class is an occurrence of a course that is specific to a location and a date, that is being administered using Training Administration. For example, 'eCyborg: Using the Web Client′ on Thursday, December 21, in Chicago is a class of the course 'eCyborg: Using the Web Client'.

Class evaluation results
These are the results as entered on the evaluation forms filled out by the class participants upon completion of the class. These results are recorded on the class evaluation results form.

Client data file
File containing information replicated from the System Control Repository. Used by client workstations to improve response time, since editing can be performed locally. May be located on each client workstation or may be located on a server and be shared by multiple client workstations on the network. Formerly known as the Client Control File.

Clock in and out
Also referred to as swipe/swiping the clock. When an employee uses their badge to record an activity time, they must pass their badge through the badge reader. This action can be referred to as clocking in and out.

Clock transaction
Record containing the information needed to create time entries for payroll processing. Clock transaction (ring) information includes date, time, and badge number. A clock transaction (ring) is created when a badge is swiped through a clock.

Clock transaction warning
Occurs when a clock transaction (ring) time falls outside of an employee's schedule warning times.

Closing costs
The costs associated with the purchase of a new house.

CLP
Abbreviation for certificates, licenses, and permits.

Codeset
A list of valid code values and associated descriptions from which you may select an appropriate entry. This is now known as an option list.

Coefficient
Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Combined register (2222) report
A report that provides a detailed printout of all earnings, hours, taxes, and deductions for all the payments and adjustments made on a payroll run. It is Report Generator 2222.

Command button
A standard windows control that initiates a command of sets an option (previously known as push button).

Common tax organization
A method of setting up taxation in an organization in which all necessary tax specification records are contained in a single organization. The common tax organization often handles tax specification records more efficiently, since it avoids duplication of the federal tax records and of any state or local records used by multiple companies.

Communication event
A letter or email that can be triggered automatically or manually within the system. Communication events are set up by the system administrator and usually include data from a form or record.

Compa ratio
The ratio of a given salary compared with the midpoint of the salary range. The formula is the salary divided by the midpoint.

Competency
A requisite capacity to perform a single or set of skills or activities.

Complement limit
A 'complement limit' is the maximum number of complement units that can be assigned to a position at any one time.

Complement position
A 'complement position' is a position that is included in complement control.

Complement unit
A 'complement unit' is the type of unit used to measure the value of a position, for example, headcount, fte or hours.

Compliance
Conformity in fulfilling legal requirements.

Component
The first level of functional organization on the navigator or menu, such as employee resourcing or employee development.

Component icon
An icon that denotes the current component. There are a number of components within the system. Each component appears as an icon on the navigator.

Component plan
Any plan included under the flex master plan or grouped together under a group master.

Condition
Predefined criteria that can be added to a report's filter.

Considered earnings
An employee's paid earnings that are to be accumulated, based on plan rules, for use in determining credited service or calculations of final benefits amounts.

Considered earnings/hours (CE/H) accumulators
Used only in benefits plans to accumulate the earnings and hours an employee has acquired toward eligibility for a deferred plan. Accumulators may be retained on a monthly, quarterly, or annual basis.

Considered hours paid
Actual number of hours for which an employee was paid and that are to be accumulated based on plan rules.

Considered hours worked
Actual number of hours an employee worked. These hours are to be accumulated based on plan rules for use in determining credited service for a plan participant (or for a non-participant if eligibility has been met).

Consolidated reporting
Option that enables packaged reports to be processed for all organizations (consolidated).

Customer-defined value used in the formula to calculate a new salary grade midpoint value.

Context-sensitive help
Information about an object and its current condition. It answers the question 'what is this?'

Contribution type
The type of contribution being made to a benefits plan. The system allows for the deduction and accumulation of up to five different contributions per plan: basic employee pretax, basic employee posttax, supplemental employee pretax, supplemental post-tax, and organization.

Control 1-2
A company or group of employees (now known as an organization).

Control levels
A hierarchy of values used to determine the breakdown of an organization for reporting purposes. The values are user-defined.

Control number
An alphanumeric designation assigned to a table to define the table records that will be used for each organization.

Conversion
A method for transferring data from either a manual or automated system into the system.

Co-ordinator
A coordinator is an instructional institution, organization or person who administers training courses.

Core plan
One of the plans that make up the minimum benefits in which all eligible employees are required to enroll—for

example, medical and life. Employees who fail to return enrollment forms with their benefit choices may be automatically enrolled in the core plans (also known as default plans).

Cost categories
Cost categories are classifications or divisions used to separate costs for training into broad groupings, for example, equipment or operating costs.

Cost types
Cost types are used to further define training costs. For example, the category of equipment could be further broken down into the cost type of overhead projector and monitor rental.

Costing
Projecting the future cost of a benefits plan contribution for budget purposes.

Course
A course is a separate unit of instruction in a subject being administered using the training administration solution. For example, 'eCyborg: Using the Web Client′ is a course. This may be applied to a training course provided internally or externally.

Course directory
A course directory is a list of all available courses.

CPI
Characters **p**er **i**nch

Credited service
The number of years of employment for which an employee is given credit for use in determining final benefits amounts.

Crew
A group of employees who rotate from one schedule assignment (shift) to another, following a rotation pattern.

Crew code
A unique, one-character, alphanumeric identifier of a crew.

Cross-reference keys
Provide direct query access to data within the system database.

CSL
Abbreviation for ***Cyborg Scripting Language*** (on page 559).

Cumulative data
Also called 'to-date data'. includes payroll earning, deduction, net pay, taxable wage, and tax to-date figures for employees.

Cursor
A special symbol, usually a solid rectangle or a blinking underline character, that signifies where the next character will be displayed on the screen. To type in different areas of the screen, you need to move the cursor. You can use the arrow keys or a mouse to move the cursor.

Customer-defined
Values that depend on an organization-specific definition--for example, option list.

CYB88X
An English Language root program used to set the production version switch to on or off, in addition to other automatic settings.

Cyborg Scripting Language
Cyborg's fourth-generation programming language, previously called English Language.

Data extract
Method for extracting information from The Solution Series for the purpose of subsequently loading it into eCyborg Interactive Workforce databases.

Data load
The process of moving data from one system or media to another. It encompasses data mapping, data extraction and conversion, and the actual loading of the data. Also the method of loading data extracted from The Solution Series into eCyborg Interactive Workforce databases using programming scripts.

Data mapping
The process of identifying, comparing, and matching data (field to field) to be converted from one system or media to another.

Database
A collection of information organized so that a computer program can quickly search for and select

specific pieces of data. Think of a database as an electronic filing system.

Datamart
Relational tables with a defined structure that have been designed to automatically accept full datamart extract data seamlessly.

Deduct credits by plan
A method of distributing flexible benefit credits. The total monetary value for credits is prorated based on the employee's pay frequency. Credits are given to employees as earnings added to their pay; the cost of individual employee plans are collected through payroll deductions and listed on the employee's payment stub.

Deduct credits by plan method
A method of distributing flexible benefit credits. Credits are given to employees as earnings added to their pay; the individual employee plan costs are then collected through payroll deductions.

Deduction
An amount subtracted from available net pay. Deductions can be involuntary (child support or maintenance) or voluntary (pension plans).

Deduction cycle
A predetermined schedule for taking voluntary deductions, based on the defined frequency.

De-enrollment
The process of shutting off plan benefits for an employee for reasons other than a separation activity.

Deferred compensation
Any benefit that is not immediately payable to an employee, but is instead deferred to a later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plan.

Deferred plan
Any benefits plan in which benefits are not immediately payable to an employee, but are deferred to some later date. This term refers to retirement vehicles, including all defined benefit, defined contribution, stock, and thrift/savings plans.

Delimiter
A character that tells the system where an item of data ends and another starts.

Dependent
An individual who relies or depends on another for his or her support.

Dependent number
A unique number in the eCyborg Interactive Workforce database that identifies an employee's spouse and his or her other dependents.

Detail page
A page in eCyborg Interactive Workforce that displays detailed information. Summary pages contain links to the detail for each record.

Dialog box
A secondary window that appears on the screen to present information or request input. Dialog boxes are generally temporary—they disappear after you enter the requested information.

Disability insurance tax
A tax required by some us states to be funded by employee-paid contributions to pay all or part of the cost of disability insurance coverage. On the Payroll Solution, us state disability insurance tax records are established as Type 4 taxes.

Disciplinary action
Action taken against an employee for violation of an organization policy or procedure.

Discretionary increase
A salary increase amount or percentage determined by a manager according to the guidelines established by the organization.

Display
Make data or images display on a computer monitor.

Display box
An area on a form in which data is displayed (formally known as an inquiry field).

Disposable income
For garnishment purposes in the us, an employee's earnings minus deductions required by state or federal law.

Distributed location
A customer location where data changes are replicated and may be distributed. A DL is identified to the system by a unique 5-position alphanumeric node ID.

Distribution
The process of passing data from a source DL to one or more target DLs.

Distribution rules
A set of parameters that determine how data will be distributed from one DL to another. These are defined at each DL by the owner using the distribution rules screens. Distribution rules are stored in tables that are not replicated (thus, they cannot be distributed).

DL
Abbreviation for ***distributed location*** (on page 561).

Double-click
Click a mouse button twice in rapid succession.

Drop-down list
A drop-down list is a view of the acceptable entry options available for a text box.

Drop-down list box
A standard windows control that displays a current setting but can be opened to display a list of choices. The user selects a choice by double clicking on the choice. The user can type into the field, and the system moves the list of choices to the last letter typed.

Dynamic SQL
Statements created by a program that must be interpreted and converted to executable sql statements at run time.

Earned income credit
A refundable amount that reduces the tax owed by certain low-income individuals in the us who meet adjusted gross income levels.

Earning
Money paid in return for work performed or services rendered. In Payroll Administration, earnings are separated by earning numbers into various categories such as regular pay, overtime pay, shift pay, bonuses, and so forth.

Earnings category
Used to categorize similar earnings. For example, all the overtime earnings can be grouped into category 01, all the shift differentials/premiums into category 06, and so forth.

EBCDIC
Extended **B**inary **C**oded **D**ecimal **I**nterchange **C**ode; binary code for alphabetic and numeric characters developed by IBM for its computers.

eCyborg Interactive Workforce Home
Button on every page that returns the user to the eCyborg Interactive Workforce Home Page.

eCyborg Interactive Workforce Home page
Home page that displays each time employees log on to eCyborg Interactive Workforce after completing the new user tasks on the New User Home page.

Effective date
Date on which an event takes place, for example, an enrollment or benefits plan change.

EIC
Abbrevation for ***earned income credit*** (on page 561).

EL
Abbreviation for English Language, now called CSL (Cyborg Scripting Language).

Electronic Performance Support system
Online tools that help users perform their job quickly and efficiently. EPSS can include online help, computer-based training (CBT), electronic manuals, wizards, and so on.

Email
Literally 'electronic mail'. This is a message that is sent to one or more people within or outside of your organization by an automated email software package.

Employee cancellation
An employee cancellation occurs when an employee is canceled from attending a training class or training program.

Employee Database
The file that contains organization and employee records. This is File02. It was formerly known as the Master File.

Employee Database record
The complete record for an employee. It may be composed of multiple physical records.

English Language
Former name of Cyborg's fourth-generation programming language, now called Cyborg Scripting Language.

Enrollment form
A customer-defined form used by employees to record their benefits elections and any associated dependent and/or beneficiary information.

Entitlement accrual
An accumulation of hours for an employee benefit, such as sick leave or vacation time, commonly known as an accrual.

Entity
Each Organization Unit, Job, Position, and Incumbent is an entity. Together they are entities.

Entry field
An area on a screen or browser page where the user can input information.

Entry form
An entry form is a form used to enter data.

Environment
The host platform and workstations where your Cyborg system resides, and any communication protocols. Also, a work space dedicated to a specific processing type. For example: development, test, and production.

EPSS
Abbreviation for ***Electronic Performance Support system*** (on page 561).

Establishment Reporting
Establishment Reporting occurs when an employer with several business locations chooses to file wage reports, broken down by location or unit, to the Social Security Administration. Each unit is identified by a four-character code, called an Establishment Number. The employer obtains approval from the SSA to use Establishment Reporting. Establishment Reporting does not apply to 1099s.

Event
The combination of a trigger (changes made to system data) and an action (the creation of an email or letter). Events always consist of these two component halves.

Excused absence
Absences from regularly scheduled work that can be considered as either paid or unpaid time off.

Extract file
A data file generated to be used by another system or application.

Federal Insurance Contributions Act
The United States Federal Insurance Contributions Act imposes two taxes on both employers and employees. Tax is withheld from an employee's wages to finance the Old-Age, Survivor's, and Disability Insurance (OASDI) social security program and the Hospital Insurance (HI) medicare program. Employers are then required to match the amounts withheld from employees. On the Payroll Solution, employee information for FICA-OASDI social security tax is entered on tax record 101 and FICA-HI Medicare tax on tax record 103.

FICA
Abbreviation for Federal Insurance Contributions Act.

Field
A data item on the database. This is usually displayed on a form as a text box.

eCyborg Interactive Workforce specific—A space allocated for a particular item of information. A tax form, for example, contains a number of fields: one for your name, one for your Social Security number, one for your income, and so on. Every field has a name (also called a field label).

Filter
Device used by report to select certain rows of information from the database, thus limiting the amount of data from the database to be viewed in the report.

Finished
Users click Finished when they have completed all information on a checklist or other *ESS* page.

Flat rate tax
A US local tax that is calculated as a standard percentage rate and that is calculated in the same way for all employees (that is, factors such as marital status do not enter into the calculation). For many such local taxes, Cyborg does not provide tax specification information on the Tax Authority File. Instead, you need to enter a Tax Specification Record for the tax on a Tax Specification Information form, indicating the tax rate in the Flat Rate text box.

Flex credits
Units granted to an employee in order to purchase benefits under a Flexible Benefits Program.

Flex Master Plan
Defines your Flexible Benefits Program and ties component plans together as a group. Employees are enrolled in the Master Plan and then select the benefit plans in which they wish to participate—for example, medical, dental, and life. Flex master plans are set up in Benefits Administration and used by eCyborg Interactive Benefits to display benefit plans to users for initial and open enrollment.

Flex plan
A benefit plan where, in addition to a core of basic benefits (if applicable), the organization/company allocates to each employee a credit for purchasing additional benefits tailored to their individual needs. Flexible benefit plans may include a flexible spending account.

Flexible Benefits Plan
A specific type of benefit plan that allows employees to select their benefits from a number of benefit plans. This term may be used interchangeably with cafeteria plan.

Flexible Benefits Program
A benefits program in which an organization may allocate to each employee a pool of credits or a monetary amount that is to be used to purchase benefits tailored to individual needs.

Flexible Spending Arrangement
A benefits welfare plan set up as an account in an employee's name that is used to reimburse the employee for certain personal expenses. In the United States, these accounts are provided by employers as a way for employees to pre-fund dependent care, legal services, or medical expenses with pretax currency.

Folder
Logical organization device for the content of a Cognos catalog.

Form
A window of information that appears within The Solution Series, including text boxes and other controls. This was formerly known as a screen.

Form area
An area of the window that contains a form.

Form Builder
A tool provided by Cyborg Systems for use with The Solution Series for designing forms.

Formal education
Education that is obtained from a college or university.

Forward
Displays the next page.

FSA
Abbreviation for Flexible Spending Arrangement.

FTE
Abbreviation for Full Time Equivalent.

FTP
File **T**ransfer **P**rotocol. A means of allowing a user on one computer to transfer files to and from another computer over a network

Full Time Equivalent
The ratio of total working time to the time that represents full time employment for a single employee. For example, an FTE of 0.5 means working half of the time that represents full time employment.

Funeral days
Absences from regularly scheduled work due to a funeral, which at the discretion of the organization, can

be considered as authorized or unauthorized, paid or unpaid time off.

Gap analysis
Comparison of a current state of being with a desired state of being. For example, you could perform a skill or competency gap analysis on individual employees or on the workforce as a whole, comparing the existing state of skills and competencies with the required state or level of skills and competencies.

Garnishment
A legal procedure authorizing a deduction from an employee's earnings to satisfy a legal requirement.

General ledger interface
A file that provides a balanced payroll journal for the period. This file contains journal entries for labor expenses, withheld deductions, income, disability, UI, and other withheld taxes, net pay, and company-paid taxes. The interface may also be produced on paper.

Go to details
Displays a new page with detailed information. Used on summary pages.

Graphical User Interface
The Solution Series provides integrated human resource and payroll functionality via the Microsoft Windows Graphical User Interface. These are the elements that display on your screen.

Grievance
A formal complaint made by an employee against the organization usually because of an unsatisfactory working condition or other work-related dispute.

Gross wages
The total of all earnings paid to an employee.

It is stored in the Total Pay (field 119 of the US Tax Authority File) field of the employee's US FICA tax record 101 (FICA-OASDI). This figure appears on the Combined Register (2222) report as Total Pay. It does not appear on US W-2 forms.

Group box
A standard Windows control that groups a set of controls.

Group plan
Defines any number of benefit plans tied together as a group. Group plans are used to define common eligibility and to cluster plans for reporting purposes.

GUI
Abbreviation for Graphical User Interface.

Handicap
Having a physical or mental disability that substantially limits activities especially in relation to employment or education.

Health and safety profile
Data on the employee record that includes information such as the employee's blood type, language, physician, emergency contacts, and any disabilities.

HED
Acronym for Hours, Earnings, and Deductions. Each earning or deduction must be established in The Solution Series with a unique identifying three-digit code. HEDs are used to record pay, hours worked, and deduction amounts and arrears for each employee.

Help
Hot spot on an eCyborg Interactive Workforce page that displays step-by-step directions for completing the page.

History record
Part of an employee's payment history; a snapshot of a check paid to an employee or an adjustment made to an HED or tax.

Holiday days
The time off that all employees are entitled to based on the decision of the organization or government regulation.

Home page
The main page of a Web site that generally serves as an index or table of contents to other documents stored as pages on the site.

HTML
Abbreviation for **HyperText Markup Language,** the authoring language used to create documents on the World Wide Web. HTML defines the structure and layout of a Web document by using a variety of tags and attributes.

Import facility
A tool delivered with The Solution Series that moves data from an external source to any organization or employee form.

Import record
A line in a spreadsheet or delimited file that contains employee or company data.

Inactive plan
A benefits plan that no longer allows employee enrollment.

Inactive tax record
An employee tax record that is no longer in effect for a given employee. Neither wages nor taxes are accumulated for the particular tax record. However, any wages and/or taxes already accumulated remain until clearing is performed. Such clearing is usually performed in preparing the Employee Database for a new year. The inactive records can be deleted at this time. The process of making a tax inactive is called deactivating.

Incumbent
An incumbent is an employee linked with a specific position. The linking of an employee with a Position is an incumbency. An employee may be linked to more than one position; in other words, an employee with multiple incumbencies. A position to which more than one employee is linked has multiple incumbents.

Information-level security
These records grant access to employee and table data via specific password records.

Initial Administrator
Only user whose user ID and password are created during installation. The initial administrator always has authority to all administrative functions: eCyborg Interactive Workforce, Human Resources Administration, Benefits Administration, and Payroll Administration, and can assign administrative roles to others by creating administrative user IDs and passwords.

Initial passwords
Password generated by eCyborg Interactive Workforce for each user ID extracted from The Solution Series. Users must create a user-defined password when they log on to eCyborg Interactive Workforce for the first time.

InitialAdmin
See Initial Administrator.

Inquiry form
A inquiry form is a form used to view data already entered.

Instructional text
Any paragraph(s) on the page that explain the function of the page or fields to the user.

Internal candidate
An employee of your organization who is applying for another job or position in your organization.

Internet
A global network connecting millions of computers.

Intranet
A network belonging to an organization, usually a corporation accessible only by the organization's members, employees, or others with authorization and used to share information.

Investment funds
Different options or accounts available to employees for allocating their contributions, usually applicable to thrift/savings plans.

IPEDS
Integrated Postsecondary Education Data System.

Job assignment
A job associated with a particular employee.

Job code
A designation for a job assignment.

Job streams
A generic reference, Job Control Language, for your operating system's command language.

Alternately: Jobstreams

Job type
A generic category that further defines a particular job.

Jury duty
This is compulsory service on court appointed juries. Employers are required by law to excuse jury duty

related absences. They are not, however, required by law to pay the employee during this time away from the job.

Label
Text that describes the information the user enters into the field.

Labor record
A record containing the hours, amounts, associated charge-to control levels, and function assigned on the employee's Payroll Home Location/Pay Allocations form.

Leave of absence
Occurs when an employee leaves the organization for a period of time, usually temporary, for personal reasons such as medical leave.

Log off
Logs the user off the system. When referring to the Log Off button, use initial caps.

Logical Employee Model
A collection of default employee information that is used to create a model. Logical Employee Model templates are used when hiring new employees to save time and ensure that critical information is established consistently and correctly. These were formally known as LMODELs.

LPI
Lines **p**er **i**nch

Mailing address
An address, other than your legal residence address, to which you have your mail sent.

Maintenance payroll run
A maintenance payroll run automatically updates organization and employee records, but it does not process time entries or generate payments, pay slips, or deposit advices. It is also used to create payment history records.

Major activity
Event that causes a change in an employee's employment status, such as a new hire, termination, or rehire.

Mandatory field
A field that requires the user to enter information before the user can exit the screen or page.

Map file
Stores the predefined relationships between an import file and a form.

Mass time entry creation
Creating time entries for a group of employees through one program execution, such as for a paid holiday.

Master File (0202) report
A Cyborg report that produces a formatted display of the data in an employee's current batch Employee Database record. This includes the wages and taxes accumulated for the employee, covering current, month-to-date, quarter-to-date, and year-to-date information for individual tax codes. It is report generator 0202.

Matrix ID
Unique identifier for each pay-for-performance matrix.

Menu
A list of choices; the choices are generally links that take the user to another screen or page.

Menu bar item
A menu that appears on the menu bar.

Message area
An area of the window that contains messages or selection lists relevant to the current form. The Message Area can be turned on or off.

Method code
One of many specific routines (usually delivered by Cyborg and identified by a two-character code) used to calculate earnings and deductions.

Midpoint
The middle of the span of currency from the minimum to the maximum of the employee salary grade.

Minimart
Relational tables you create so you can insert data from your Subset data extractions.

Monetary perquisites
A privilege or profit that an employee is entitled to that is incidental to regular wages or salary.

Moving expenses
The expenses incurred by an employee due to moving from one location to another for employment purposes.

Multiple master
A file compression technique that duplicates the current employee Permanent Master Record as many times as there are payments to that employee during one pay period. These multiple masters are detail records reflecting the amounts for the payment being made (current), and the adjusted MTD, QTD, and YTD totals. The system uses multiple master records to create history records showing the current payment figures only.

Navigation bar
In eCyborg Interactive Workforce the Navigation bar shows the name of the page you are using, for example, 'Mailing Address'. The top line of the Navigation bar shows the path you took from the Home page to reach the present page. Links on the Navigation bar let you return to the home page or log off the system.

Navigator
Left pane of the work area which forms the main method of moving through the forms. From the Navigator users select the component, process, and task in which they are interested.

Net credit method
A method allocating flex credits. An employee's cost of benefits is calculated as either a net cash earning or a net deduction from the employee's pay. The net amount is the difference, either plus or minus, between the credits allocated to the employee and the cost of his or her flex benefits choices.

New hire
Process of hiring a new employee for your organization.

New user
A user of eCyborg Interactive Workforce who has not yet completed reviewing and updating their personal information on the New User Home page.

New User Home page
Home page that displays for new users of eCyborg Interactive Workforce until they complete reviewing and updating their personal information.

Node
A Distributed Location.

Node ID
A unique 5-position identifier for a node. The naming convention is defined by the user.

Number registered
This is the number of employees registered for a training class. It is updated and displayed on the Class Schedule form.

Object
Each System Control Repository record type is assigned an object code. A single record type can have several object codes assigned to allow limited display.

Object key
A field that allows you to specify the System Control Repository record group you want to display. The value of this field is dependent on the type of information you want to display.

Obsolete plan
A benefits plan that will no longer be used.

Off cycle
An off-cycle payroll run is an additional payroll for the period just completed. An off-cycle payroll run is commonly used to process nonstandard payments, such as bonuses. It is sometimes referred to as an additional or bonus payroll run.

Online
Turned on and connected, for example, printers are on-line when they are ready to receive data from the computer. Users are considered on-line when they are connected to a computer service through a modem. That is, they are actually on the line.

Open enrollment
A period of time during which employees can enroll in or change their benefit choices for the upcoming year, generally in October or November.

Operator ID
A four-character code that identifies the user to the system.

Option
An item in the option list for a field. This was formerly known as a codeset item.

eCyborg Interactive Benefits and Benefits Administration specific—In Benefits, the plan coverage that an employee selects, such as single or family coverage.

Option button
A standard Windows control that allows you to select from a fixed set of mutually exclusive options (previously known as radio button).

Option list
An option list is a list of options that are available within a Text box. This was formerly known as a Codeset.

eCyborg Interactive Workforce specific—Options available in The Solution Series that the eCyborg Interactive Workforce administrator loads in to eCyborg Interactive Workforce. The options are then available in the drop-down list boxes in eCyborg Interactive Workforce.

Organization
A group of employees who are employed in a common structure, governed by the same set of rules or policies, and eligible for the same earnings and deductions For example, your organization may be structured into parts that represent employee groups such as active, union, retirees, applicants, and so forth.

Formerly known as a company or Control 1-2.

Organization Level 3
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Organization Level 4
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 5
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Level 6
A customer-defined value used to determine the breakdown of an Organization for Human Resource reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Organization Number
A six-character user-defined code that represents an organization; the highest level of the organizational structure in Payroll Administration.

Formerly known as a Control 1-2.

Organization Unit
An organization unit ('Org Unit') is a grouping of Positions within an organization (for example, Accounts Department).

Organization Validation table
A table that validates that an organization is valid and payments can be made.

Organization-specific tax setup
A method of implementing Tax Specification Records in which each organization involved in tax processing contains all the specification records required to process taxes for its employees, as opposed to a common tax organization.

Override file
A file used to maintain COBOL or Report Generator changes to the system.

Packaged reporting
A processing mode in which a job is scheduled to be run at a certain time.

Paid absence
Employee absence that will be paid by the organization. A time entry will be created for this absence.

Parallel run
The process of executing the same programs simultaneously on two separate systems to obtain the same or similar results.

Parameter form
A form that is displayed when certain programs are called from the Navigator or menus. The form facilitates entering parameters for the program.

Password
A secret series of characters, generally user defined, that enables you to access a computer, a software application, or a file. On multi-user systems, each user must enter his or her password before the computer will respond to commands.

In eCyborg Interactive Workforce, the password ensures that unauthorized users cannot access user-specific information.

Password aging
The period of time that elapses before a user-defined password expires and the user must change his or her password.

Pay allocation
A means of allocating, on a percentage basis, employee labor hours and amounts to multiple sets of control levels 3 through 6 and function to accurately reflect employees whose labor must be charged to more than one area within an organization.

Pay document
A pay slip or deposit advice with its associated pay stub.

Pay frequency
The interval at which a group of employees is paid. Examples are weekly and semimonthly. Also referred to as a payroll period.

Pay schedule
A predetermined schedule for a calendar year, identifying period-end and payment dates for each pay frequency.

Pay stub
A preprinted form, corresponding to a check or deposit advice that lists all earning, gross pay, taxes, deduction, and net pay information for an employee.

Pay-for-performance matrix
Chart representation of the variables that result from the combination of salary increase information, how much to give and when.

Payment history record
A record documenting the detail information for a payment or adjustment. Multiple payment history records may be generated for an employee, reflecting multiple adjustments or payments. These records include all earning, deduction, and tax information included in the payment or adjustment.

Payroll home location
The location where the employee is normally assigned to work and where labor distribution information is charged. An employee's home location comprises specific Payroll Levels and is always assigned Allocation Number 01 on the Payroll Home Location/Pay Allocations form. The Function field may also be used as part of a home location, depending on your specific requirements.

Payroll Level 3
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so forth, as defined by you.

Payroll Level 4
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 5
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll Level 6
A customer-defined value used to determine the breakdown of an organization for Payroll reporting or selection purposes. This control level may be translated to a division, plant site, section, and so on, as defined by you.

Payroll period
A defined period of time for which an employer pays wages to employees.

Payroll Process Control
A series of forms used during the Payroll Process to determine the type of run (payroll run or maintenance run). Allows you to specify the pay frequencies to be paid and which reports are to be produced.

Payroll run
Updates organization and employee records, processes time entries, calculates employee pay, generates pay documents and payroll reports, including the Combined Register. It also produces a variety of special interface outputs.

PCL
Printer **C**ontrol **L**anguage

PDF
A file format that captures formatting information from a variety of desktop publishing applications, making it possible to have formatted documents appear on the screen and be printed. To view a file in PDF format, you need Adobe Acrobat Reader, a free application distributed by Adobe Systems.

Peer-group appraisal
Appraisal that uses performance evaluations completed by an individual employee's co-workers or project team members.

Pending de-enrollment segment
Plans for which an employee is enrolled, but has lost eligibility, as listed on the Pending Plan Enrollment/De-Enrollment form.

Pending eligibility segment
Plans for which an employee is eligible but not enrolled, as listed on the Pending Plan Enrollment/De-Enrollment form.

Performance appraisal
A periodic assessment and ranking of an employee's skills and accomplishments.

Performance appraisal rating
A method of ranking the performance of an employee during a given period using options ranging from 1-Outstanding to 5-Unsatisfactory.

Performance rating
A method of ranking the performance of an employee during a given period using options ranging from 1-Outstanding to 5-Unsatisfactory.

Performance-related pay
Monetary payments made to employees based on how well an employee has fulfilled job expectations.

Perquisites
Property or privileges extended to an employee.

Personal days
Authorized absences that are generally considered as paid time away from regularly scheduled work, but can be either paid or unpaid.

Phonetic keys
The keys you use to access employee data using the phonetic spelling of an employee's last name.

Pixel
The smallest rectangular area of an image on a screen.

Plan deactivation
A process that makes a plan inactive and prevents future employee enrollment.

Plan ID
A three-position, alphanumeric identifier for a plan in the system.

Plan shutdown
The process of de-enrolling an employee from all benefits plans because of a separation activity.

Plan year
The 12-month period over which a salary budget is effective.

eCyborg Interactive Workforce specific—The calendar, policy, or fiscal year in which the records of a Benefits plan are maintained.

Policy tables
Highest level tables that are used to record the generic (or master) rules for an organization or group of employees. These included your organization's rules relating to working time procedures, such as clocking in and out, docking for lateness, and overtime. Each

policy consists of a Policy Master table and one or more Policy Activities table.

Pop-up menu
A menu that appears when you use the second mouse button within the system. This menu contains context sensitive commands and options that relate to the object you have clicked on.

Portable document format
See PDF.

Position
A specific role with an organization—for example, Accounts Manager.

Alternative definition: to place an object in a specified location.

Position Administration Control Number
Two-character alphanumeric value that tells Position Administration which tables to use for a specific company.

Position complement
A 'Position complement' is the value of a Position. The organization complement is the total value of all Positions included in the complement.

Position in range
The difference between a given salary and the minimum of the salary range, divided by the difference between the range's maximum and minimum, and expressed as a percentage.

Posttax
A contribution made after taxes have been withheld from earnings.

Premium
The amount of money an organization agrees to pay an insurance company for a policy or annuity, or the amount contributed by an employee to the employer to cover the employee's portion of the total premium.

Prenotification
Informing a bank or credit union that an employee will be using direct deposit with them in the future. Cyborg recommends that you fill out the Direct Deposit Information form two pay periods in advance of the first deposit date. This ensures that a prenotification record is provided to the bank or credit union in a timely manner.

Pretax
A contribution made before taxes have been withheld from earnings.

Primary account
The account set up in eCyborg Interactive Workforce to receive an employee's pay or reimbursement checks. After deductions and deposits to additional (secondary) accounts, the remainder of pay is deposited into the primary account.

Process
A subset of a component that logically groups tasks on the Navigator or menu. For example, the process 'Maintain Employee Details' contains tasks such as 'Basic Employee Information' and 'Personal Information'.

Alternate definition: An action that brings about a result.

Process bar
The graphical representation of a process on the navigator. Each process bar is within a Component.

Program
A program is a series of classes being administered using Training Administration. For example, 'The Cyborg Training Schedule for January-June 1996' may be a program consisting of eight different classes.

Alternative definition: a form or other program within the system, accessed directly from the Command dialog box. For example, form EF-SCR is a program.

Protected amount
The amount of disposable income protected from garnishment in the US This amount may vary from state to state.

Prototype HED
An HED defined on a benefits form for use in recording employee/organization contributions when an employee is enrolled in a benefits plan. This allows the setup and maintenance of payroll deductions using Benefits Administration.

Provider
A provider is an instructional institution, organization, or person who is available to teach training courses.

Push button
A button on the interface which appears depressed when clicked on (now known as command button).

Quartile
Points that represent the division of a salary grade range into four equal parts.

Query alternate keys
The keys you use to access the employee master record in an order other than by primary key.

Query primary keys
The keys you use to direct your QUERY program to a record type.

Quick Hire
The process of hiring an employee by entering one two-panel form with the required data elements rather than entering a series of forms.

Radio button
A button on a form that selects an option, the radio buttons that make a field are mutually exclusive (now known as an option button).

Recall
Return a laid-off employee to active status, usually with no affect to benefits.

Reciprocal taxation
Reciprocal tax withholding refers to agreements made between US states and (or) localities regarding income tax calculation and reporting for compensation paid to an employee who lives in one state or locality and works in another.

Record
A complete set of fields, such as the fields that make up a tax form or a name and address record.

Alternate definition: To set down for preservation in writing or other permanent form.

Recruitment
Process of finding and hiring new employees who meet the needs of your organization.

Recycle File
P05IN; A file that contains employee data and pay document information required for payment reconciliation. It also contains time entries to be processed and paid at a later date. This file is used to pass data to the next payroll or maintenance run.

Registration
Registration is the act of enrolling an employee in a class.

Registration number
A three-digit registration number is assigned to employees for tracking purposes when they register for a training class. This enables the order in which the employees registered to be viewed.

Rehire
The process of hiring a former employee of your organization. Typically, a break in service is incurred and benefits must start over (usually requiring a new adjusted seniority date if used in benefits tracking).

Reimbursement account
The account into which employee's travel and other expense type reimbursement checks are directly deposited.

Reinstatement
The process of returning a former employee to active status within a certain time period (such as 90 days), thus qualifying the employee to have certain benefits restored to the original hire date.

Reject time
The point at which an error condition will occur. An error condition must be manually corrected/approved and approved before a time entry can be generated by the system.

Relocation
The process of moving an employee from one organization to another geographic location, whether the move be domestic or international. This process also applies to applicants who are being relocated as part of the hire process.

Remaining net pay
The 'bucket' of money that is left after all employee deductions and taxes have been taken from the employee's gross pay. This 'bucket' of money can then be used for multiple deposits if the enterprise sets up multiple deposit HEDs.

Replication
The automatic process of writing changes made in the Employee Database and option lists and tables in the System Control Repository to the Replication Holding File (FILE08).

Replication Application
English Language program (DSAPLY) that reads records from the Replication Packet File (FILE20) produced by the Replication Reception program (DSRECV) and updates the System Control Repository and Employee Database accordingly.

Replication Distribution
Two COBOL programs that work together to distribute and receive updates. The Replication Distribution Program (DSTRIB reads either the Replication Holding File (FILE08) or a Replication Packet File (FILE20), selects data applicable to a specific DL and writes all necessary data to a new output-only Replication Packet File (FILE21). The resulting FILE21 will be processed on the remote DL via the DSRECV Replication Reception program.

Replication Holding File
FILE08. This file contains additions, changes, and deletions to the System Control and the Employee Database. Data is distributed from and written to this file, based on the data distribution rules configured for the target DL by the source DL.

Replication Packet File
(FILE21/20). This file contains data changes and is created specifically to update a target DL. This information may include Company/Employee data, tables and option lists, and time entry and adjustment records.

Report
The term report refers to a report produced on paper.

Report Generator
A program that produces the batch payroll and the batch payroll reports.

Report Group
A series of packaged reports that are created using the Report Group Activities form and are run together.

Report Group Scheduler
This is the program that allows you to schedule reports. This was formerly known as the Report Scheduler.

Report parameters
Specific guidelines for determining the information to be processed by a given report or program.

Requisition
A formal request to fill a vacancy or vacancies.

Requisition candidate
A candidate for a vacancy represented on a requisition.

Requisition limit
A total unit value of a requisition.

Requisition unit
The value of a requisition expressed as an FTE, hours, salary or headcount.

Retirement
Occurs when an employee retires from the organization.

Return
The activity of an employee returning as an employee to active status, usually following a leave of absence.

Alternative definition: key on keyboard used to perform a carriage return, can also be known as Enter.

Review process
A method used by an organization to evaluate an employee's salary or performance in a standard, timely manner.

Roll-up reporting
Option that enables packaged reports to be processed within organizations (roll-up).

Rotation pattern
A way of describing the working pattern for a group of employees (crew) who regularly work different shifts.

A crew is a group of employees who together regularly work the same schedules according to a rotation pattern.

Safety standards
Legally-mandated workplace safety standards.

Salary budget record
Defines, for each employee, the budgeted increase amount, percentage, and effective date for a specific salary plan year, and the prorated effect of this increase on the budget in terms of amounts and percentages for each employee.

Salary grade
A range of salary amounts associated with a particular job.

Salary grade range
A range of salary amounts associated with the salary grade for a particular job.

Salary plan
A set of rules or guidelines used to budget for salary increases for the coming year.

Salary plan year
A 12-month period over which a salary plan is effective.

Salary range
The span of salary amounts from the minimum to the maximum of the employee salary grade.

Salary review
A periodic evaluation of an employee's compensation.

Salary review authorization form
Hard copy format of the employee criteria necessary to review and approve proposed salary increases.

SAT file
The Solution Series form appearance table. Simple text file that reflects the form's layout.

Save Changes
Saves the page (form) the user completed. (When you click 'Save Changes', eCyborg Interactive Workforce saves the information on the page whether or not the user made changes.)

Schedule Activities table
Identifies activity types for each point in a work day where the process of clocking in and out should be dealt with. Each Schedule activity also contains time parameters that will be used to calculate whether an employee will be docked or credited time.

Schedule assignments
Also referred to as a schedule. This term refers to the details of the Schedule Master tables to which an employee is assigned. These details include the date the assignment took place, the Schedule Number and Sub-Schedule Number, and (if applicable), the crew to which the employee is assigned.

Schedule error
Occurs when a clock transaction (ring) time falls outside of an employee's schedule reject times.

Schedule Master table
Used to set up your organization's Time and attendance rules (such as HEDs and the minimum number of hours an employee must work before a meal deduction is made). A Schedule Master table is associated with a Calendar Routine, earnings Code, and Shift Premium table by entering the appropriate identifier.

Schedule number
A unique three-character alphanumeric identifier used to partially identify a schedule table.

Screen
Now known as a form.

Scroll bar
When information on a page takes up more than one screen of your monitor, the system adds scroll bars to the right side of the screen. On the scroll bar:

- Click the up arrow to move line by line to the top of the page
- Click the down arrow to move line by line to move to the bottom of the page
- Click the double arrows to move several lines up or down the page

Click and drag the bar in the scroll area to manually move up or down the page.

Search argument
The value from an employee's master record used to search benefits tables to apply plan rules to specific groups of employees.

Search type
The definition of a field from an employee's master record to use as the search argument.

Secondary account(s)
Additional account or accounts at financial institutions that employees set up in eCyborg Interactive Workforce receive a portion of their pay. A primary account must be defined before an employee can set up additional accounts.

Security Officer
The assigned employee who is responsible for the setting up and monitoring of the security your Cyborg system.

Self-adjusting taxes
Taxes for which the system automatically recalculates the tax on a cumulative year-to-date basis on each payroll run.

In the U. S. these include FICA taxes: Social Security (tax record 101) and Medicare (tax record 103). The purpose of this calculation is to avoid any differences (of pennies) in FICA tax paid versus FICA tax due at year-end due to rounding on a pay period basis. In addition, certain state disability taxes and employee-paid state unemployment insurance taxes also self-adjust.

Sequential Master File
P20IN; The batch processing version of the Employee Database. This file contains organization and employee data, tax tables, and the object code for programs.

Service interruption
A period of time during which an employee did not maintain an active working status in the organization.

Service method
A calculation option list that determines the method for calculating credited service.

Session
When users log onto a software application, they begin a session. When they log off, they end the session.

Alternate definition: The period of time during which a class is held.

Shift
An employee schedule assignment for a given day. For a rotation pattern, this is a Sub-Schedule Number.

Alternative definition: key on keyboard, typically used to describe key combinations for a shortcut key.

Shift premium
A premium (or differential) added to an employee's regular earnings, overtime earnings, or both. It is represented by a shift code or HED Number.

Shortcut menu
A menu that appears when you right-click within The Solution Series 4. This menu contains context-sensitive commands and options that relate to the object (form, Navigator, and so on) on which you have clicked.

Sick days
The time off that an employee is allowed to take due to illness as a result of an employment contract or organizational policy.

Solution View
An online utility that provides the tools for creating new forms, fields, and report programs without the direct use of Cyborg Scripting Language.

Source DL
The node that owns the data being distributed. Depending on the rules established, the same DL can alternate from source to target.

Special assessment
Extraordinary or temporary taxes, such as additional employer-paid or employee-paid contributions to state unemployment programs or to mandatory health insurance programs.

Spinbox
A control on the interface composed of a text box and increment and decrement buttons that allow you to adjust a value from a limited range of possible values.

Spreadsheet application
Software for recording ledger entries, creating worksheets, graphing data, and other accounting functions.

Standalone Time and Attendance
Customers who are using the Cyborg's Time and Attendance Administration but not the Cyborg's Payroll Administration.

Static data
Includes organization and employee information, such as name and salary.

Static SQL
Data Definition Language (DDL) and Data Manipulation Language (DML) statements embedded in application programs.

Status bar
The bar that appears at the bottom of The Solution Series window. The Status Bar displays useful information, such as your current session number, the currently displayed organization and employee, and so forth.

Statutory employee
Any of the four categories of workers who are independent contractors under common law and are treated by statute as employees. These include:
(1) a driver who distributes beverages (other than milk) or meat, vegetables, fruits, or bakery products; or who picks up or delivers laundry or dry cleaning, if the driver is your agent or is paid by commission.
(2) certain types of full-time insurance sales reps
(3) an individual who works at home on materials supplied by you that must be returned to you
(4) certain full-time traveling or city salespeople.

Social Security and Medicare (FICA) taxes may or may not be withheld. Income taxes are not withheld from a statutory employee. A statutory employee will receive a W-2 with the 'Statutory Employee' box checked.

Sub-schedule number
A two-digit numeric text box used to further identify a schedule table.

Succession planning
Finding and developing employees for placement into identified key positions that are expected to become vacant sometime in the future.

Summary page
To help you see information at a glance, eCyborg Interactive Workforce uses summary pages. The summary page displays a short view of detailed information. For example, all your emergency contacts appear on a summary page. You delete the contact or proceed to the detail for the contact from the summary page.

Summary plan
A customer-owned description of a benefits plan.

Supplemental wages
Wages that are separate from regular earnings may be classified as supplemental wages and taxed using the default method. The default method means using a set percentage specified by the tax authority. Examples of such earnings are bonuses and commissions.

Surplus
A 'surplus' is an exceeded complement position.

System administrator
An individual responsible for maintaining a multi-user computer system, including a local-area network (LAN). Typical duties include:

- Adding and configuring new workstations
- Setting up user accounts
- Installing system-wide software
- Performing procedures to prevent the spread of viruses
- Allocating mass storage space

System Control Repository
This is the file that contains system definitions for The Solution Series, (FILE01).This was formerly known as the Control File.

System Generator
A type of Report Generator that performs system functions, such as defining data elements and system messages.

Table
Contains an organization's rules and policies and controls what actions take place at the employee level.

Alternative definition: means of displaying information in columns and rows.

Table Definition Record
Table containing data about the Position Administration table records, including the location of keys to associated tables.

Target DL
The node that receives the data being distributed. Depending on the rules established, the same DL can alternate from target to source.

Task
The lowest level of organization on the Navigator or menu, generally equivalent to a form. checklist, or dialog.

Task icon
An icon denoting a task. Task icons describe the type of task, including Forms, Checklists, Dialogs and others.

Tax authority
A government agency to which an employer and employee has statutory tax obligations. The tax authorities for which you handle taxes exist at the federal, state/province, and local levels.

Tax Authority File
A Cyborg-supplied file that contains all the tax-specific information needed to calculate taxes for tax authorities. This includes wage-bracket tables for different marital statuses and information relating to allowances and standard deductions. The sources for the contents of this file are tax specifications published by the various tax authorities.

Tax code
The three-character to seven-character Cyborg-supplied reference code that identifies a tax and that serves as the link between the Tax Specification Record and the employee tax record.

Tax Maintenance File
One of the two Cyborg-supplied tax files. A Tax Maintenance File is a file issued by Cyborg in conjunction with a Tax Update Bulletin (TUB). It contains all the tax specifications that are being updated in the bulletin, in the form of tax specification transactions. These transactions are typically used as input to the batch maintenance run in which tax updates are applied.

Tax specification
Each tax authority publishes tax specification information that specifies how each tax must be administered. This information specifies how employers should calculate taxes and how taxes should be withheld from employees (if withholding applies). The tax specifications can be in the form of tax formulas and (or) tax tables.

Tax Specification record
A record on your Employee Database that contains the tax specifications for a tax. The record contains all the information, as obtained from the governmental authority, needed to calculate tax amounts for the tax. The record may contain more than one tax; for example, US state Tax Specification records contain information for both state income tax and state unemployment insurance. Once a Tax Specification record is activated, tax specification information from the Cyborg-supplied tax files can be loaded onto the record on your Employee Database.

Tax table
A set of information required to calculate a tax, for a specific set of employee parameters. Tax tables are stored and maintained in Tax Specification records. A table typically includes wage and bracket information and data relating to allowances, such as personal exemptions and to standard deductions. There can be several tables relating to marital and resident status in a given Tax Specification record.

Tax type
This term refers to various categories of taxes, for example, income, National Insurance, unemployment, disability, Social Security (FICA-OASDI), and Medicare (FICA-HI).

Taxability
The term refers to whether an hours, earnings, and deductions amount is to be included in taxable wages to be accumulated for a specific tax. If the hours, earnings, and deductions amount is excludable, then the amount is not included in taxable wages. If the hours, earnings, and deductions amount is taxable, then the amount is included in taxable wages. The term fully excludable or fully taxable implies that more than one type of tax is being referenced, for example, state income tax and state unemployment insurance in the US.

Taxable wage base
The taxable wage base represents the maximum amount of an employee's wages on which tax is levied and after which there is no liability. A wage base in the US

typically is in effect for FICA, unemployment taxes, and disability.

Tax-related Regulatory Bulletin

A TUB contains the updates to tax specifications supplied by Cyborg, consisting of a bulletin document, a tax file that contains the updated tax specifications, and a printed listing of tax specification transactions with the updates.

TDR

Table Definition Record.

Template

A basis from which to create a custom item. For example, you can use an existing Cyborg report as a template for your custom report.

Temporary password

A set of alphanumeric characters used with a user ID to limit access to a software application. The system requires that users replace their temporary password with a user-defined password within a certain number of days.

Termination

The activity of an employee no longer being employed by the organization.

Test environment

A separate organization or system partition used only for testing.

Text box

A control on the interface in which text can be entered and edited (formerly known as a field).

Text qualifier

The character surrounding an item between delimiters. All values between the qualifier are data items and are not scanned for a delimiter. This allows a delimiter character, such as a comma, to be a valid data item. Example:

"item 1","item 2","item 3, 4 and 5"

This string contains three data items:

Item 1

Item 2

Item 3, 4 and 5

Although the third item contains a comma, it is ignored as a delimiter because it is between the text qualifier of speech/quotation marks (").

Time entry

The form in which you enter the hours worked for an employee. This was formerly known as a Time Card.

Time entry extract file

A file of time entries external to the Time and Attendance Solution that is used to feed to payroll.

Time entry validation

The Time Entry Validation/Creation program identifies and assigns an activity, for example Clock In (1), to each clock transaction (ring) when performing the validation function. Each clock transaction must be assigned to an activity, in order for time entry hours to be calculated for an employee, for a particular shift. This program validates clock transactions (rings) and generates time entries.

Timeout

The period of time that elapses before a user's eCyborg Interactive Workforce account becomes invalid because of inactivity.

ToolTip

A standard Windows control that provides a small pop-up window that provides descriptive text, such as a label, for a control or graphic object.

Top-down appraisal

Appraisal made by a supervisor or manager of an employee's capabilities. Such an appraisal is generally based on the supervisor's or manager's day-to-day observation of an employee's work performance and will usually include an appraisal interview with the employee.

Trainer

Trainers are set up on the Provider Index Form. They are instructional institutions, organizations or persons who are available to teach a training class.

Trainer code

The trainer code is a four-character value that represents a trainer. This value resides in Option List TR38.

Training area
The training area is recorded on the Class Schedule Form. It is typically defined as the section of the organization to which the training applies, such as manufacturing.

Training class results
These are the class details and absence information recorded on the Process Class Results form. Details recorded include the objectives met when taking a training class.

Training class status
The status value is updated and displayed on the Class Schedule Form. It tracks whether the training class is canceled, full or available.

Training course code
The training course code is a six-character value that represents a training course. This value resides in Option List TR33 and is associated with a course title.

Training plan
A plan of training courses that an employee will attend in the future to achieve the necessary skills to perform a job.

Training reason
The reason for training is used to identify why a training request has been made. For example, the purpose of the training to act as a refresher, to acquire new skills, and so forth.

Training request
A training request is a request for an employee to attend a specific course or class. A formal request for training is not essential. This step could be omitted and the employee could be registered directly in the course of his or her choice.

Transfer
Process of moving an employee from one organization to another organization, such as moving an applicant from the applicant organization to the active employee organization.

Alternative definition: to move data or files from one computer to another

Trend analysis
Reporting or statistics that indicate the rate of change in costs and other elements of a benefits plan.

Trigger
A set of conditions that must occur for an email or letter communication event to start. This can involve the creation, deletion, or modification of forms or checklists within the system.

Tuition reimbursement
Remuneration made to employees for tuition expenses.

Type of training request
The type of training request indicated whether the employee was required to attend the training or whether he or she asked to attend the training.

Unauthorized absence
Absences that are generally not considered paid time away from regularly scheduled work.

Underlined text
In browser applications, text that provides a link to another screen or page.

Unemployment insurance tax
A tax required by some US states to be funded by employee-paid contributions to pay all or part of the cost of unemployment insurance coverage. On the Payroll Solution, state unemployment insurance tax records are established as Type 2 taxes.

Unpaid absence
Employee absence that will not be paid by the organization. A time entry will not be created for this absence.

Upward appraisal
Appraisal that calls for evaluations by those who work under the direction of the employee being evaluated.

URL
Acronym for uniform resource locator. A standard way of specifying the location of an object, typically a web page, on the Internet. URLs are the form of address used on the World-Wide Web. They are used in HTML documents to specify the target of a hyperlink which is often another HTML document (possibly stored on another computer).

User class
Cognos Impromptu assigns security according to configured user profiles. These security profiles are configured by your Impromptu administrator.

User code
A set of characters (up to eighteen alphanumeric characters) that, along with the password, identify the user to the system as a valid user user when they log on.

The user code is case-sensitive (upper case, lower case) and must be entered using the correct case.

User defined password
A set of alphanumeric characters created by users that allows them to view and update information in a software application.

User ID
A set of characters that identify you to the software application. The application contains a list of authorized users by user ID. When you attempt to log on, the system checks the list of authorized users to determine whether you have authority to use the application.

User profile
Used for security purposes to determine what you can and cannot do while you are using the system, and which parts of the system you can access. A user profile is created and maintained for you by a Security Officer. Each user of the system will have a user profile.

Vacancy
An open position that needs to be filled, or an unfilled complement position

Vacation days
The time off that an employee is entitled to as a result of an employment contract or due to length of service.

Validation
The process where the Time Entry Validation program identifies and assigns an activity to a clock transaction (ring) when performing the validation function.

Variant forms
Method of displaying country-specific variation of Cyborg-delivered forms.

Waive
The act of choosing not to enroll in an optional benefits plan.

Warning time
Used to set a period of time after which an employee will appear on the exception report for a particular activity. A Warning condition will allow the creation of a time entry. A Reject condition will not. This is part of the Time and Attendance Administration.

Welfare benefit plan group
First level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare benefit plan subgroup
Second level of the logical organization of welfare benefit plans in eCyborg Interactive Workforce.

Welfare plan
Any insurance or other benefit plan that provides immediate benefits to a participant—for example, medical insurance.

What-if mode
Method for processing a report that allows viewing of information without updating of employee records.

Window
A standard Windows object that displays information. A window is a separately controllable area of the form that typically has a rectangular border.

Wizard
A form if user assistance that automates a task through a dialog with the user.

Work area
The Solution Series screen. It includes the menus, toolbars, Navigator, forms area, message area, and status bar.

Work instructions
Specific tasks to be completed during the migration of data and files from test to production.

Work restrictions
Restrictions that prevent an employee from participating in specific workplace functions.

Worker's compensation
Legislation in the US that provides compensation to employees who suffer work-related injuries.

Workforce competency
The capacity of the overall workforce to perform required functions and sets of activities.

XHTML
Extensible HyperText Markup Language, used by the help pages for eCyborg.

Year End Master File
P20OUT file from the final payroll run of the year

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