Getting Started with Attendance Enterprise
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A Companion Document to Attendance Enterprise 1.6

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Getting Started with Attendance Enterprise
Welcome to Attendance Enterprise—a comprehensive time and attendance solution for your labor force tracking needs.

About This Document
This document is part of the Attendance Enterprise documentation set. *Getting Started with Attendance Enterprise* provides the information you need to use Attendance Enterprise to:

- Add employee information.
- Review employee benefit balances.
- Generate and print reports with basic employee information.
- Export employee data for use with other applications.

Audience
This guide is for users who add and update employee information in Attendance Enterprise and who administer employee benefits (vacation, sick days, and so on). Users should have a working knowledge of Windows functions and know how to run applications using Windows.
Related Documents

This document is part of the Attendance Enterprise documentation set. Other documents in the set include:

- **Performing Time Card Functions**
  This document describes how to edit and maintain employee time cards.

- **Scheduling Employees & Managing Leave**
  This document describes how to use Attendance Enterprise scheduling functions to create schedules for individuals and groups. The leave management process facilitates scheduling employees for time off.

- **Using Management Information**
  This document describes how to obtain different types of attendance summary information. It also describes how to obtain yearly summaries of employee attendance.

- **Printing Reports**
  This document describes each of the time and attendance reports available within Attendance Enterprise.

- **Managing Your System**
  This document describes how to maintain user accounts, define tasks, and perform other system management functions.

- **Importing and Exporting Information**
  This document describes how to import data from and export data to other applications.
Chapter 1
Introduction

This chapter introduces you to Attendance Enterprise. It provides an overview of system capabilities and describes Attendance Enterprise components. It also provides a step-by-step roadmap for getting started with Attendance Enterprise.

Attendance Enterprise Capabilities

Attendance Enterprise is a full-featured time and attendance system designed to make employee tracking, scheduling, and reporting both efficient and intuitive. Attendance Enterprise can:

- Track employee time and attendance statistics, both immediate and long-term.
- Calculate gross pay and benefits for hourly and salaried employees.
- Generate reports ranging from individual employee statistics to company-wide performance statistics.
- Help different types of software users do their work efficiently and with ease.

Time and Attendance

Attendance Enterprise helps you track employee work habits by maintaining attendance records, tracking attendance in real time, and scheduling employees by shift.

Creating and Maintaining Attendance Records

Attendance Enterprise creates time cards for your employees that can be viewed and altered from your computer system or the web. Attendance Enterprise keeps track of employee in and out punches, employee transfers between departments, and supervisor changes. It automatically creates archives for current and past time cards that can then be accessed quickly and easily without wasting time or storage space.
Real Time Attendance Tracking

You can track attendance of individuals and groups for the current minute or day, for recent pay periods, or for past years using time cards and a yearly calendar of attendance history. All of this is available from your desktop or over the web (using Manager Self Service). You can also monitor exceptions to scheduled attendance, such as late arrivals, in real time. This helps you deal with attendance issues before they become chronic problems. When you review time cards, exceptions to scheduled times and unscheduled shifts are highlighted for easy identification. Weekly, monthly, annual, and custom views of exception data are also available.

Scheduling Shifts

Using simple point-and-click actions, you can create schedules for individual employees or whole workgroups in minutes. When employees always work the same shifts, you can schedule them once and never update their schedules again. You can even schedule departmental transfers or rate changes.

Payroll and Benefits

Attendance Enterprise simplifies payroll and benefits calculations by generating payroll source files. Using information from employee time cards, Attendance Enterprise calculates hours and gross pay, including holiday pay, premiums, shift differentials, and a variety of bonuses. It exports pay period data, which is converted to a designated format for processing by the company’s payroll service.

Reports

Attendance Enterprise maintains a wide range of valuable employee attendance information, allowing you to view reports on attendance, scheduling, labor coverage, attendance history, and employee status. Attendance Enterprise allows management to review time and attendance statistics through reports in several formats.

You can customize the format and content of any standard report offered by Attendance Enterprise or you can create unique reports that precisely match your company’s needs. Different report formats, like summary sheets and YTD History views, show the information you need as a chart or calendar. This visual format makes it easy to see trends for single employees or groups of employees.
System Components

Attendance Enterprise combines broad-range, custom parameter configurations with a number of data collection options. This combination of highly customized software and hardware provides unique, advanced capabilities for a total time and attendance solution.

Customizing Attendance Enterprise Parameters

Attendance Enterprise parameters are customized for your business operation. Parameter settings reflect your pay guidelines, attendance policies, benefits policies, and other company-specific factors. Attendance Enterprise parameters are configured by your installing technician.

Collecting Attendance Data

Attendance Enterprise, like many time and attendance systems, can use time recorders to collect attendance information. Attendance Enterprise web components also allow employees to enter time card punches directly from their web browsers. Attendance Enterprise accepts imported time and attendance data from other applications, as well.

Attendance Enterprise Users

Attendance Enterprise provides tools and information for a variety of people in your organization. Users with different responsibilities use different parts of the Attendance Enterprise package.

Your system administrator can establish restricted access to various components of Attendance Enterprise. Most users see only the features and employees in Attendance Enterprise that are important to them. Private information is limited to specific users.

The following example illustrates the use of Attendance Enterprise in a fictional company.

Case Study: The XYZ Company

At XYZ Company, the human resources department uses Attendance Enterprise to enter new employee information. Human resources staff can access the Employee Information window and the various employee reports.

XYZ unit supervisors use Attendance Enterprise to schedule their employees and review and edit employee time cards. Supervisors also access time and
attendance summary information for their units only. Using these parts of the Attendance Enterprise system and related reports, XYZ unit supervisors manage employee attendance, maintain accurate time cards, and analyze their units’ productivity.

XYZ executive management needs a broader perspective on time and attendance statistics. They use Attendance Enterprise summaries to view attendance and labor cost figures. They have access to XYZ corporate and departmental statistics.

XYZ payroll personnel use Attendance Enterprise to access all time cards for all employees. They also use Attendance Enterprise to create various time card reports and to export payroll information to XYZ’s payroll service.

**Overview of Attendance Enterprise Installation and Operation**

Attendance Enterprise installation and operations are highly customizable. Your organization can skip or add steps, as needed. Typically the process works like this:

1. An InfoTronics-certified installation professional installs Attendance Enterprise software and data collection devices. Company-assigned personnel work with the installation technician to customize Attendance Enterprise for your company’s time and attendance needs.

2. Payroll or human resources personnel enter employee information in Attendance Enterprise and assign badges and pay rates. There are two ways to enter employee data:
   - Import files from other applications. This method is best used when entering data for an entire workgroup.
   - Manually type employee information into Attendance Enterprise. This method is best used when entering new employees.

   See page 37 for details on importing employee data and manual entry.

3. Security or human resources personnel issue badges to employees.

4. Supervisors create employee schedules using Attendance Enterprise scheduling features. Supervisors can create recurring schedules (schedule patterns) for employees who regularly work the same shifts, or can schedule employees on a weekly or monthly basis. Scheduling allows the company to
track employee attendance and collect exception information such as tardiness, long breaks, or frequent absences.

5. Attendance Enterprise retrieves transactions from data collection devices (time clocks). At installation, Attendance Enterprise is set up to automatically poll time recorders on a regular and frequent basis. It can also be configured to automatically import transactions from other devices. Transactions from web components and real-time clocks are instantly incorporated into the Attendance Enterprise database.

6. Company-assigned personnel have access to To Do Lists. To Do Lists are specialized activity lists that can be configured for each
Attendance Enterprise user. The list reminds each user of his or her daily, weekly, or monthly responsibilities. The list also allows the user to track completion of these responsibilities.

7. Supervisors review and edit time cards. Time cards track employee attendance and calculate gross pay. Supervisors can make edits to time cards to correct errors or add missing information.

8. Payroll supervisors post and export payroll. At the end of each pay period, supervisors verify time cards and make any necessary edits. When payroll is posted, the payroll staff uses Attendance Enterprise to export pay period information to a source file to be delivered to the company’s payroll service.

9. Company management reviews and analyzes Attendance Enterprise data. Time cards show data for one employee at a time; summaries and various reports show company-wide time and attendance trends and their associated costs. Management personnel can also analyze the attendance of specific employees or departments and evaluate various exceptions such as tardiness or absenteeism.
This is an example of how Attendance Enterprise can be used. Your use of Attendance Enterprise depends on the structure and preferences of your organization.

Getting Started with Attendance Enterprise
Navigating Through Attendance Enterprise

Attendance Enterprise is designed to look, act, and feel like Microsoft Outlook.

Note: The appearance of Attendance Enterprise windows varies based on the user’s access rights. If you do not have access to one or more functions or toolbars, those items are disabled or are not displayed.

You control Attendance Enterprise using menus, toolbars, the Folders list, and shortcut menus. This section offers tips for using toolbars, the Folders list, and shortcut menus to your best advantage. Workgroup trees or lists and the To Do List, also commonly used, are described here as well.

Toolbars

Toolbar commands control many of the functions in Attendance Enterprise. Attendance Enterprise includes several toolbars: Standard, Time Card Editing, Employees, Operations, and Maintenance. Your toolbars may contain several or many buttons, according to your role in the organization. Custom toolbars are also available. For more information on customizing toolbars, see Managing Your System in the Attendance Enterprise documentation set.
To hide a toolbar, clear the check next to the toolbar name in the View menu.
**Favorites Bar**

The Favorites bar is a customized list of commonly performed tasks. The example shown here is labeled Attendance Shortcuts.

When you click on a symbol, the functions associated with it are displayed in the current view area. For example, when you click on Employees, a list of available functions is displayed in the current view area.

---

**Current View Area**

**Folders List**

**Favorites Bar**
There are several options for viewing items in the Favorites bar:

- Add an icon by dragging the function name from the Folders list to the Favorites bar.
- Hide the Favorites bar by right-clicking in the Favorites title bar area and selecting Hide Favorites Bar.
- Delete icons from the Favorites bar by right-clicking the item and selecting Remove from Favorites Bar. Delete a customized Favorites bar by right-clicking on the Favorites bar and choosing Remove Group.
- Redisplay the Favorites bar by clicking on the View menu and selecting Favorites Bar.
- Create a customized Favorites bar by right-clicking in the Favorites bar area and choosing Add New Group.
- Rename a Favorites bar by right-clicking on the bar and choosing Rename Group.
Introduction

**Folders List**

The Folders list organizes and accesses Attendance Enterprise functions in folders similar to those seen in Windows Explorer. You review folders and folder contents by clicking on the folder.

When ▶️ appears to the left of a symbol, the folder can be expanded to display additional information. Click ▶️ to show the hidden information. To hide the displayed information, click ◄.

When ◄ appears to the left of a symbol, all available information related to that symbol is displayed. To hide the displayed information, or collapse the folder, click ◄. To show it again, click ◄.

You can hide the Folders list by clicking ✗ in the upper right corner. Redisplay the Folders list by choosing Folder List from the View menu.
Shortcut Menus

Shortcut menus appear throughout Windows applications. They are accessed by right-clicking in the window. Shortcut menus are an important tool in Attendance Enterprise. Right-click on almost anything to perform commands specific to your current location or activity in Attendance Enterprise.

Common commands in the shortcut menus are:

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Opens the folder.</td>
</tr>
<tr>
<td>Cut</td>
<td>Removes the highlighted section.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copies the highlighted section.</td>
</tr>
<tr>
<td>Paste</td>
<td>Places the section that has been previously cut into the new location you have selected.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the highlighted section from the page.</td>
</tr>
<tr>
<td>Add to Favorites Bar</td>
<td>Adds the item to the Favorites bar.</td>
</tr>
<tr>
<td>Command</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>--------------------------------------------------------------</td>
</tr>
<tr>
<td>Properties</td>
<td>Allows you to view or change the properties of the item.</td>
</tr>
<tr>
<td>View</td>
<td>Provides alternate ways to view the contents of a window.</td>
</tr>
<tr>
<td>Arrange Icons</td>
<td>Provides alternate ways to order the contents of a window.</td>
</tr>
<tr>
<td>Refresh</td>
<td>Updates the window to display all current information.</td>
</tr>
</tbody>
</table>

**Workgroup Lists and Trees**

Workgroups are an important part of Attendance Enterprise. Workgroups, described in detail on page 27, indicate where an employee works in the hierarchy of the organization, permanently or temporarily. A workgroup set allows Attendance Enterprise to classify each employee’s hours, pay, and benefits correctly.

There are 2 ways to select a workgroup set in Attendance Enterprise. User preferences determine whether you select workgroups from lists or trees.

Work group selection lists are presented side-by-side. In this example, the user chooses the workgroup set by clicking on the Location (Workgroup 1), the Department (Workgroup 2), and then double-clicking on the Cost Center (Workgroup 3).

Another way to choose the workgroup set is with a tree structure. Simply select the proper workgroup set from the list.
Note: Your organization’s workgroup names will vary.
To Do Lists

If your company uses To Do Lists, you see the To Do List when you first log on to Attendance Enterprise. In addition, a toolbar button can display the To Do List at any time.

The To Do List helps you organize activity you do regularly with Attendance Enterprise. You can go directly to each activity from the To Do List. You can also see old To Do Lists, as well as any incomplete items from previous days.

Each item on the To Do List is customized for you. Clicking on an item can, for example, run a report, display a summary, or show a list of employees who have not worked their schedules.

Summary

Attendance Enterprise is an advanced, highly customizable time and attendance solution. Attendance Enterprise provides a wide range of essential functions such as:

- Employee time and attendance tracking – historical, current, and future.
- Calculation of employee gross pay and benefits.
- Unique, flex, and repeating pattern scheduling.
- Report generation, both standard and customized, for employee and company-wide time and attendance performance review.
Once Attendance Enterprise is installed and user access is defined, users perform tasks specific to their payroll, human resources, supervisory, or executive job functions.
Chapter 2
Adding Employees

This chapter provides detail on how to enter employee information in Attendance Enterprise. Employees must be entered in the system so that Attendance Enterprise can track their attendance.

This chapter presents several Attendance Enterprise concepts that are important in employee definition. It describes the fields you use to add employee data and explains how to add multiple employees at once using import tasks.

Before You Add Employees

Understanding some terms used in Attendance Enterprise can help you accurately define employees in the system.

Workgroups

Attendance Enterprise organizes employees in a tiered hierarchy of workgroups. The examples in this documentation set use 3 workgroups, but you can use as many as 7 in your organization. In the following diagram, workgroups have been named according to company functions:

In this example, employees are assigned to a cost center within a department at a specific company location. A combination of a single work group at each level is called a workgroup set.
Each employee has a *home workgroup* to which he or she is assigned. The assigned workgroup becomes part of the *employee personal information* (the set of data which establishes the employee’s identity in Attendance Enterprise). An employee can also be temporarily or permanently transferred to another workgroup.

Workgroups are represented throughout Attendance Enterprise by the following symbols.

- **Workgroup 1.** This symbol identifies the first part of the workgroup set. Your installation technician can use a meaningful name (for example, Locations) to label this workgroup level for your organization.

- **Workgroup 2.** This symbol identifies the second part of the workgroup set. Your installation technician can use a meaningful name (for example, Departments) to label this workgroup level for your organization.

- **Workgroup 3.** This symbol identifies the third part of the workgroup set. Your installation technician can use a meaningful name (for example, Cost Centers) to label this workgroup level for your organization.

**Pay Classes**

Pay classes are a collection of Attendance Enterprise settings that capture your attendance guidelines and pay policies. For example, different unions represented in the same company treat overtime differently. Their members belong to different pay classes. Your installing technician associates a pay class with each employee so that Attendance Enterprise can accurately calculate hours and gross pay for all employees.

**Employee Punches**

Employees punch in or out using time clocks, web browsers, kiosks, or cell phones.

Companies often specify the time clocks where an employee or workgroup can enter punches. These sets of clocks are known as *clock groups*. For example, administrative staff may be required to enter punches at clocks located in the front half of the building.
Employee Self Service allows employees to punch using web browsers. Similarly, kiosks allow multiple employees to punch using the same computer. Cell phone numbers can also create punches for employees. These methods do not use clock groups, although one is assigned to each employee by default.

**Adding Employees Using a Wizard**

To add an employee to Attendance Enterprise:

1. Right-click Employees in the Folders list and select Add Employee.

2. The Add New Employee Wizard is displayed.

3. Click Next
4. Indicate the employee’s name. Click Next.

![Add New Employee Wizard](image)

**Field** | **Description**
--- | ---
Employee’s Last Name | Specifies the employee’s last name. This field can accept up to 30 alphanumeric characters.
Employee’s First Name | Specifies the employee’s first name. This field can accept up to 30 alphanumeric characters.
Middle Initial | Specifies the employee’s middle initial. This field can accept up to 2 alphanumeric characters.

5. Indicate the employee’s badge number. This is the number of the badge that the employee uses to punch in and out. You can enter a unique badge number (up to 11 numeric characters) or accept the next available badge number provided by Attendance Enterprise. Salaried employees who do not punch should be assigned the badge number 0. This is the only badge number that can be assigned to more than one employee at a time.
6. Click Next.

7. Indicate the employee’s clock group assignment. The clock group identifies which time clocks the employee can use to perform attendance transactions. Click Next.

8. Indicate the employee’s ID and social security number/social insurance number. Click Next.
Adding Employees

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Employee ID            | Specifies the employee’s unique ID number. ID numbers cannot be reused when an employee leaves the company; the ID still represents the old employee in archived data.

**Note:** IDs for purged employees can be reused. However, this is not recommended.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee SSN/SIN Number</td>
<td>Specifies the employee’s social security number or social insurance number.</td>
</tr>
</tbody>
</table>

5. Indicate the employee’s pay class. Pay classes determine payment guidelines like the length of the lunch period or whether overtime is allowed. Click Next.
6. Indicate the employee’s schedule pattern and the day the schedule will begin. Click Next.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Pattern</td>
<td>Assigns a predefined repeating schedule called a schedule pattern. Schedule patterns eliminate the need to reschedule employees who regularly work the same schedule.</td>
</tr>
<tr>
<td>Schedules Begin</td>
<td>Specifies the date when the schedule pattern takes effect.</td>
</tr>
</tbody>
</table>
7. Enter the employee’s home workgroup set. For more information on selecting a workgroup set, see page 22. Click Next.

8. Indicate employee’s work status. The values of this field can be customized for your company. Click Next.

9. Indicate whether employee is paid hourly or is salaried and effective date. Click Next.
### Field | Description
--- | ---
Pay Type | Indicates the employee’s pay type (for example, hourly, salaried, and so on).
Rate of Pay | Specifies the employee’s rate based on pay type:
  - If an employee is hourly, the rate is hourly.
  - If an employee is salaried, the rate is the salary for a pay period.
Effective On | Specifies the date when the new pay rate takes effect.
Active Condition | Specifies the employee’s active status (for example, active, probation, training, and so on). Active status values can be customized for your company.

10. Choose what to do after adding the employee to the database. Click Next.
### Option Description

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to view list after adding to database.</td>
<td>When selected, adds employee to folder list immediately. This refreshes the system. If adding a number of employees, you can save time by waiting to do this until you add the last employee.</td>
</tr>
<tr>
<td>Browse to employee after adding to database.</td>
<td>When selected, displays employee Personal Information window after wizard is complete.</td>
</tr>
</tbody>
</table>

11. Attendance Enterprise notifies you when the employee is successfully added to the database.
12. Click Finish to confirm.

The employee is added to the database. The employee’s information is now available using the employee’s Personal Information window. You can add to or edit information in the Personal Information window as needed. See Chapter 3, Maintaining Employees, for detailed information.

### Adding Employees Using Imports

Importing employee data from another application is the most efficient method for adding multiple employees.

You can create import files in several ways:

- Create a dBASE III file from your existing employee database.
- Create a .CSV ASCII file using a text editor, word processor, or spreadsheet.
- Create a file in Time Bank format

The following table describes the types of imports available within Attendance Enterprise for adding new employees to the database.

<table>
<thead>
<tr>
<th>Import Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple Employee</td>
<td>Imports the employee name, ID, badge number, workgroup set, and pay class information from a file.</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>Imports the employee benefit information from a file.</td>
</tr>
</tbody>
</table>
Adding Employees

<table>
<thead>
<tr>
<th>Import Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comprehensive Employee</td>
<td>Imports all employee information from a file.</td>
</tr>
<tr>
<td>Transfer Rates</td>
<td>Imports employee transfer rates for specific workgroups from a file.</td>
</tr>
<tr>
<td>WorkGroup</td>
<td>Imports a list of workgroup names and associated codes.</td>
</tr>
<tr>
<td>Parameter XML Import</td>
<td>Imports employees and all of their information including personal information, schedules, transactions, and history.</td>
</tr>
<tr>
<td>Import Employee Wizard</td>
<td>Imports information from an Excel spreadsheet to complete and maintain an employee’s records.</td>
</tr>
</tbody>
</table>

You can import other types of employee information, as well. The following table describes several employee imports. You can import this type of information for a new employee; however, these imports are typically used for existing employees.

<table>
<thead>
<tr>
<th>Import Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule</td>
<td>Imports employee schedules from a file.</td>
</tr>
<tr>
<td>Schedule Pattern</td>
<td>Imports employee schedule patterns.</td>
</tr>
<tr>
<td>Badge Initiated</td>
<td>Imports punches and transfers from a file.</td>
</tr>
<tr>
<td>Transactions</td>
<td></td>
</tr>
<tr>
<td>Supervisor Edits</td>
<td>Imports supervisor edits to employee time cards from a file.</td>
</tr>
<tr>
<td>Scheduled Budgets</td>
<td>Budgets are not yet implemented. This import is for future use.</td>
</tr>
</tbody>
</table>

Your system manager can set up the Attendance Enterprise data import tasks. For more information on import tasks, see *Importing and Exporting Information* in the Attendance Enterprise documentation set.
Summary

At installation, Attendance Enterprise is customized for your organization. Once this is complete, company-assigned personnel can work with employee data in Attendance Enterprise.

Attendance Enterprise provides several windows through the Employees folder for entering personal information as well as company-related information (transfer rates, rate of pay, employment status, and so on). Attendance Enterprise also provides several types of import options for transferring multiple employees’ data from other applications.
Chapter 3
Maintaining Employees

This chapter provides details for three key tasks:

- Locating employees in Attendance Enterprise
- Updating Attendance Enterprise employee information
- Removing employees from Attendance Enterprise

Accessing Employee Information

The Attendance Enterprise Employees folder provides access to all employee records in Attendance Enterprise. The folder contains information about both individual employees and employee workgroups. Access the Employee folder by clicking on the Employees symbol in the Attendance Enterprise Favorites bar or Folders list or double-clicking the Employees symbol in the current view window.

Viewing Employee Information

Expand the Employees folder to display employee information categories in the current view window.
You can expand Employee subfolders (Personal Information, Time Cards, Schedules, YTD History View, Archives, Benefits, and Badges) to view the list of employees. For example, if you expand the Personal Information subfolder you will see a list of employees. Click on an employee name to access his or her Personal Information window.

**Employee Subfolders**

The Employee subfolders use symbols to represent the various types of information available. To access information, expand the subfolder. You may not see all folders depending on your access rights.

Symbols include the following:

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Personal Information" /></td>
<td><strong>Personal Information.</strong> This folder contains a variety of information for each employee. This employee information includes personal information, like name, address, telephone number, and social security number, and work-related information like hourly status, rate of pay, and benefits.</td>
</tr>
<tr>
<td><img src="image" alt="Time Cards" /></td>
<td><strong>Time Cards.</strong> This folder contains electronic time cards. These time cards are automatically updated when transactions are polled from the time clock(s). The time cards can also be edited by an employee’s supervisor or others with time card access authority.</td>
</tr>
<tr>
<td><img src="image" alt="Schedules" /></td>
<td><strong>Schedules.</strong> This folder contains each employee’s assigned work schedule. If a schedule pattern has been assigned to the employee, the schedule updates automatically. The schedule can also be adjusted by the employee’s supervisor or others with schedule access.</td>
</tr>
</tbody>
</table>
access authority.

**YTD History.** This folder contains employee attendance history by year. This view can be adjusted to display hours worked, dollars earned, the pay designation, and/or schedule exceptions (tardy, late punch out, and so on).

**Archives.** This folder stores employee time cards for previous pay periods. Time cards archives are typically maintained online for 5 years, but this duration can be customized for your installation.

**Benefits.** This folder lists general employment status dates as well as benefits earned and taken. In Attendance Enterprise, benefits refer to paid or unpaid time off of work (vacation, sick days) or bonuses.

**Badges.** This folder maintains a list of badges.
Locating Employees Using Find

The Find function allows you to search for an employee by name, ID, or badge number. Select a category under the Employees folder from the Folders list and click the Find button in the toolbar.

If you know the exact spelling of the employee’s name:

1. Enter the name in the Find Who field.
2. Select Find employees whose names Exactly match. Attendance Enterprise locates and displays all employees matching that spelling.
3. Highlight the desired employee in the list.
4. Click OK. The Folders list displays the employee’s information.

If you do not know the exact spelling of the employee’s name, use the Find employees with Similar names option. Attendance Enterprise displays all employee names that approximate the spelling you enter.

You can also enter an employee’s ID or badge number in the Find Who field to locate an employee. When using this option, you must select Find employees whose names Exactly match before beginning the search.

Locating Employees Using Exceptions

In addition to locating individual employees, you can also locate employees who meet specific criteria. For example, unit supervisors preparing employee time.
Maintaining Employees

Getting Started with Attendance Enterprise

Cards can use Attendance Enterprise to identify all employees with missing punches using the Missing Punch exception view. Similarly, Tardy Today exception view can indicate which employee time cards need attention. Exception views are available in the Exceptions folder.

Creating Exception Views

You can define exception views using three criteria:

- Date or time range in which the exceptions occurred
- Workgroups in which the exceptions occurred
- Types of exceptions to be tracked

You can group exceptions in whatever way makes the most sense to you. For example, if you are a payroll manager, you can group unauthorized time card exceptions by supervisor. If you are collecting data on workplace efficiency, you can track the number of tardy exceptions, for example, by location. Finally, if you want to separate each exception individually it is possible to do that, as well.

To create exception folders:

1. Right-click on the Exceptions icon in the current view window or the Folders list and choose New.

2. The Add New Exception View window is displayed. Complete the fields as described for each of the following tabs.

3. Click OK.
Basic Tab

Field Description

Name Specifies the name of the exception list to be generated. The default name is Search Created by … following by user name, date, and time. You can accept the default or type a new name in this field.

Group Employees by Exception When selected, specifies that the exception view displays a separate list of employees for each exception type. This is the default view. If this box is not selected, all employees meeting one or more criteria selected at the Exceptions tab (see page 30) are displayed in one list.

Further Group Exceptions by Supervisor When selected, specifies that beneath each exception list there is a further grouping by supervisor. This function requires work group validation. If your installation does not use work group validation, employees are labeled No Assigned Supervisor.
Dates Tab

Field Description

Period Specifies predefined time period to be reviewed for exceptions. You can also specify a custom time period by selecting Custom and choosing start and end dates in the From and To fields.

From Specifies the start date of the exception review. This field is filled in automatically unless a custom pay period is selected in the Period field.

To Specifies the end date of the exception review. This field is filled in automatically unless a custom pay period is selected in the Period field.

Using Specifies the pay class used to identify pay period dates when you choose Current Period or Previous Period in the Period field.

Weeks Begin On Specifies the beginning of the week when you choose Previous Week or Current Week in the Period field.

Fortnights Begin On Specifies the date on which a two week time period begins when you choose Previous Fortnight, Current Fortnight, or Next Fortnight in the Period field.
Include Tab

Click Add to display the Select a Workgroup Set window. Choose the workgroup set (see page 22). Employees belonging to selected workgroups can be included in the exception folder. Select a workgroup set and click Remove to remove the workgroup set from the exception folder.

Exceptions Tab

Select the exceptions monitored in this exception view. Click All to select all exceptions. Click None to clear all exceptions. Specify a Shift Number to see only the exceptions from one shift.

Include employees with exceptions worked in my access authority (ABS, ATH, WRK) includes employees not assigned to you in the exception view if they have certain exceptions in your workgroup: Absent, Unauthorized, Transfer, or Currently Working exceptions. This check box is only available when the Absent, Unauthorized, Transfer, or Currently Working exceptions are selected. If
you do not select the check box, employees who work in your authority but who are not assigned to you will not be shown in the exceptions folder.

**Advanced Tab**

![Add New Exception View](image)

<table>
<thead>
<tr>
<th><strong>Field</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Workgroups listed within Include page Represent</td>
<td>Indicates whether workgroups listed on the Include tab are home workgroups, workgroups employees transferred into, or either.</td>
</tr>
</tbody>
</table>
| Include Exceptions with no accumulated amounts | If selected, this option includes exceptions that do not have accumulated amounts in the exception view. **Note:** By default, if an exception has an accumulated amount of zero, it is not displayed in the list. Check this option in order to include all exceptions.
Maintaining Employees

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>Includes exceptions based on whether they have been reviewed by a supervisor. Options in the Supervisor Exception Review field are:</td>
</tr>
<tr>
<td>Exception Review</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• All Exceptions – all exceptions are displayed regardless of whether they have been reviewed or not.</td>
</tr>
<tr>
<td></td>
<td>• Only Unreviewed Exceptions – only exceptions that have not yet been reviewed are displayed.</td>
</tr>
<tr>
<td></td>
<td>• Only Reviewed Exceptions – only exceptions that have been reviewed are displayed.</td>
</tr>
<tr>
<td>Note:</td>
<td>Arrived Early, Tardy, Left Early, Left Late, Long Break, Short Break, Long Lunch, Short Lunch, Unscheduled, Flex, and Absent exceptions can be reviewed.</td>
</tr>
</tbody>
</table>

Using Exception Folders

Attendance Enterprise generates a list of employees who meet the criteria and displays them in the Folders list. Throughout your work day, press F5 to refresh the view as people generate exceptions.

Viewing a Time Card from the Exception View

You can access the employee’s time card from the exception folder. Expand the folder and select an employee, the employee’s time card is displayed in the current view area. You can then edit the time card if necessary.
For information on editing the time card, see *Performing Time Card Functions* in the Attendance Enterprise documentation set.

**Viewing a Schedule from the Exception View List**

You can also access the employee’s schedule directly from the exception list. This feature allows you to review the schedule associated with the exception.

To view the schedule for an employee included in an exception view list, expand the employee name and select Schedules for (Employee Name) beneath the name. The employee schedule is displayed.

**Updating Employee Information**

You may occasionally need to add to or change an employee’s personal information (for example, when an employee moves or receives a raise). Most
common edits can be entered in one or more of the tabs in the employee’s Personal Information window.

**Note:** *One vital piece of information you rarely change is an employee’s ID. The ID remains with the employee’s records even after the employee is terminated. If you must change an ID, be sure the new ID has not been used before.*

Access the employee’s Personal Information window by selecting the employee name under the Personal Information symbol in the Employees Folder.

Depending on your user rights, you may see some or all of the information in the Personal Information window.

**Updating Basic Employee Information**

The Basic, Personal, Private, Custom, Workgroup, and Address tabs include general information, much of which is added when the employee is added to the database.

**Basic Tab**

This tab is completed when an employee is added using the Add New Employee wizard. For a definition of these fields, see the table starting on page 30.
Personal Tab

The fields in this tab include information used by human resources personnel.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Phone</td>
<td>Specifies the employee’s primary home telephone number.</td>
</tr>
<tr>
<td>Secondary Phone</td>
<td>Specifies a secondary telephone number.</td>
</tr>
<tr>
<td>Union</td>
<td>Specifies the name of the union to which the employee belongs.</td>
</tr>
<tr>
<td>Average Weekly Hours</td>
<td>Specifies the average number of hours that the employee is expected to work each week.</td>
</tr>
<tr>
<td>Emergency Contact</td>
<td>Lists the name of a person who can be contacted in case of emergency.</td>
</tr>
<tr>
<td>Birthdate</td>
<td>The employee’s date of birth.</td>
</tr>
<tr>
<td>Time Zone Residence</td>
<td>Specifies the time difference between the employee’s assigned location and the company’s corporate headquarters. For example, if company headquarters are in Michigan and an employee’s office is in California, the employee’s time zone is - 3, or 3 hours earlier than corporate time (9:00 in California is 12:00 in Michigan).</td>
</tr>
</tbody>
</table>

Complete fields as shown in the following table.
Maintaining Employees

**Field** | **Description**
---|---
Daylight Savings Time Not Observed | When this box is selected, Daylight Savings time is not used.

**Private Tab**

The fields in this tab include information used by human resources personnel. PC Browser Access Rights refer to employee access using Employee Self Service. Cell Phone Browser Access Rights refer to employee access using a cellular phone.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Social Security Number</td>
<td>Specifies the employee’s social security number. <strong>Note:</strong> Access to social security numbers is restricted in most companies. If your user rights prohibit access to social security numbers they appear as all zeros.</td>
</tr>
<tr>
<td>Email Address</td>
<td>Specifies the employee’s e-mail address, either company-based or personal.</td>
</tr>
<tr>
<td>PIN Number</td>
<td>The Personal Identification Number the employee must enter to login to Attendance Enterprise Employee Self Service (ESS).</td>
</tr>
<tr>
<td><strong>Field</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>-----------</td>
<td>----------------</td>
</tr>
<tr>
<td>Employee May Access Account Via PC Browser</td>
<td>Specifies that the employee may use ESS.</td>
</tr>
<tr>
<td>Employee May Punch IN/OUT</td>
<td>Specifies that the employee may use the ESS site to punch in or out.</td>
</tr>
<tr>
<td>Employee May Transfer Workgroups</td>
<td>Specifies that the employee may use the ESS site to transfer workgroups.</td>
</tr>
<tr>
<td>Employee May Indicate Schedule Worked as Hours</td>
<td>Specifies that employee may use the ESS site to indicate schedule was worked. This means that Attendance Enterprise records the employee hours using the employee’s schedule.</td>
</tr>
<tr>
<td>Employee May Enter Daily Worked Hours</td>
<td>Specifies that the employee may use the ESS site to enter total hours worked rather than hours recorded by punches.</td>
</tr>
<tr>
<td>Employee May Authorize Own Time Card</td>
<td>Specifies that the employee may use the ESS site to authorize his or her time card for review by a supervisor or payroll personnel.</td>
</tr>
<tr>
<td>Employee May Enter Time Off (Non Worked Hours)</td>
<td>Specifies that the employee may use the ESS site to enter his or her own time off.</td>
</tr>
<tr>
<td>Employee May Request Time Off</td>
<td>Specifies that the employee may use the ESS site to request time off.</td>
</tr>
<tr>
<td>Employee May Add/Adjust Punches</td>
<td>Specifies that the employee may use the ESS site to add or adjust punches.</td>
</tr>
<tr>
<td>Cell Phone Browser Access Rights</td>
<td>Specifies the transactions the employee has rights to perform using a cell phone to punch in and out.</td>
</tr>
<tr>
<td>Employee Cell Phone Activity Allowed</td>
<td>Specifies that the employee may use a cell phone to punch in or out.</td>
</tr>
<tr>
<td>Employee May Enable Account on First Usage</td>
<td>Specifies that the employee may enable a cell phone account to punch in or out on first usage.</td>
</tr>
</tbody>
</table>
Maintaining Employees

**Field**
Employee Punches IN/OUT on Usage

**Description**
Specifies that the employee punches in or out with each usage of a cell phone account.

PC Browser Access Rights add options to ESS for each employee. For example, Phillip Adams has been granted all ESS rights. His ESS page looks like this:
Maintaining Employees

Getting Started with Attendance Enterprise

See *Attendance Enterprise: Employee Self Service & Kiosk* in the Attendance Enterprise documentation set for more information about ESS.

**Custom Tab**

Fields on the Custom tab include company-specific information. They are customized at installation.
Custom fields are created to collect information your company needs. A company can include custom fields for the employee’s benefit plan choices, professional affiliations, and certifications, for example. These fields can be defined for any purpose, named according to your preferences, and included on reports.

**Workgroup Tab**

The Workgroup tab contains information about the employee’s current and past workgroup assignments. Workgroup names are customized for your company at software installation.
When you add an employee, the wizard directs you to assign the employee’s home workgroup (Location, Department, and Cost Center or the customized workgroups established for your company). The Workgroup tab also allows you to specify the effective date of the workgroup assignment or to change the home workgroup assignment.

To specify an effective date, select the date from the calendar.

To change the employee’s workgroup, click the Change button. The Change Employee Workgroup Assignment Properties window is displayed. Select the new workgroup set from the list. For more information on selecting a workgroup
set from a list, see page 22. Use the Effective Beginning field to specify the date on which the workgroup assignment begins. The Notes area can be used to specify why changes are made, who authorizes changes, or for any other reason.
Address Tab

Use the Address tab to edit the employee’s home address.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 1, 2, 3</td>
<td>Specifies each line of the employee’s address. Use Address 2 and Address 3 for additional address information such as apartment number or P.O. box. Each address field accepts up to 30 alphanumeric characters.</td>
</tr>
<tr>
<td>City</td>
<td>Specifies the employee’s city. This field can accept up to 30 alphanumeric characters.</td>
</tr>
<tr>
<td>State/Prov</td>
<td>Specifies the employee’s state or province. This field accepts up to 4 alphanumeric characters.</td>
</tr>
<tr>
<td>ZIP/PC</td>
<td>Specifies the employee’s zip code or postal code. This field accepts up to 9 alphanumeric characters.</td>
</tr>
</tbody>
</table>

Updating Employee Benefit Banks

The Benefits tab allows you to review and adjust employee benefit balances. The Benefits subtabs display the balances and activity for each benefit bank. The Pay
Period Balances subtab presents information for benefits that are adjusted and calculated by pay period. The Running Balances subtab presents information for benefits that are adjusted and calculated day by day. You may see benefit information on one or both subtabs depending on how benefits were configured at installation.

Chapter 4 explains benefit banks and details benefit usage in Attendance Enterprise. For information on adjusting benefits at this tab, see page 81.

**Updating Employee Pay Rates**

Employee pay rates can be changed in 2 ways. An employee has a pay rate, the amount he or she is ordinarily paid. An employee also can have transfer rates. Transfer rates are rates paid when the employee is temporarily transferred to another workgroup.

**Assigning Transfer Rates**

The Transfer Rates tab allows you to assign a transfer rate to a workgroup for an individual employee. If the employee transfers to another workgroup for a full or partial shift, the transfer rate is used instead of the employee’s usual pay rate. Transfer rates are applied according to the employee’s pay class. This tab specifies the workgroups to which the employee can be transferred.

To review properties of a transfer rate or to add or remove a rate, right-click in the transfer rate area and make a selection from the shortcut menu.
Maintaining Employees

When you select Add or Properties, Attendance Enterprise displays the Workgroup Transfer Rate Table Entry window.

Getting Started with Attendance Enterprise
To add or edit an entry, complete the fields as shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workgroup</td>
<td>Specifies the transfer rate assigned to a given workgroup. Highlight a workgroup from the menu and double-click the last workgroup you change. For example, choose Location, then Department, and then double-click on your selection for Cost Center to close the menu and make your selection.</td>
</tr>
</tbody>
</table>

If you want the rate to apply to more than one workgroup level in the workgroup set, you can use the question mark character (?) as a pattern match. For example:

**OAK-R&D-?** applies the rate to a specific workgroup 1 (OAK), a specific workgroup 2 (R&D), and to all workgroups 3.

**OAK-?-?** applies the rate to a specific workgroup 1 (OAK) and all workgroups 2 and 3 that are defined.

However, ?-?-? is ignored since you never apply a transfer rate to all workgroup sets defined.

<table>
<thead>
<tr>
<th>Modification Type</th>
<th>Specifies the type of transfer rate. Modification types include:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- <strong>Replacement</strong> – The rate indicated replaces the employee’s regular or home rate.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Addition To</strong> – The rate indicated is added to the employee’s regular or home rate.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Multiplicative Factor</strong> – The rate indicated is multiplied by the employee’s regular or home rate. This is usually the number 1.25 or 1.5, indicating the employee receives 25 or 50 percent more than his or her regular or home rate.</td>
</tr>
</tbody>
</table>

| Rate                | Specifies the hourly rate applied to the workgroup.                                                                                                  |

**Assigning Pay Rates**

The Rate of Pay tab allows you to view an employee’s pay history and current pay rate along with the pay type (salaried or hourly), effective date, and the date and time when the pay rate is changed.
This window also provides the option of changing the employee’s pay rate and pay type (salaried or hourly). You can remove an entry in the Rate History list by right-clicking on the list entry and choosing Remove.

Press the Change button to change the employee’s pay rate. The Change Rate of Pay Properties window is displayed.
Complete the fields in this window as shown below.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rate</td>
<td>Specifies the employee’s hourly rate based on pay type.</td>
</tr>
<tr>
<td></td>
<td>• If an employee is hourly, the rate is the amount in dollars the employee</td>
</tr>
<tr>
<td></td>
<td>earns hourly.</td>
</tr>
<tr>
<td></td>
<td>• If an employee is salaried, the rate is the employee’s salary for a pay</td>
</tr>
<tr>
<td></td>
<td>period.</td>
</tr>
<tr>
<td>Pay Type</td>
<td>Indicates the employee’s pay type.</td>
</tr>
<tr>
<td>Effective</td>
<td>Specifies the date when the new pay rate takes effect.</td>
</tr>
<tr>
<td>Beginning</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td>Records a note. For example, you can note why the employee received a rate</td>
</tr>
<tr>
<td></td>
<td>change or initial the change.</td>
</tr>
</tbody>
</table>

**Updating Employee Status**

Because Attendance Enterprise status types are customized for your organization, employee status is indicated in several ways. The Hourly Status and Employment Status tabs can show whether an employee is full time or part time, actively employed or terminated. The Corrective Actions tab indicates the employee’s corrective action status.

**Hourly Status Tab**

The Hourly Status tab allows you to view or change an employee’s active status (for example, full-time or part-time), set the date when the status takes effect, view the employee’s status history, and enter notes.
Click the Change button to modify the employee’s hourly status in the Change Employee Hourly Status Properties window. Hourly status types are defined for your company at installation.

Complete the fields in this window as shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hourly Status</td>
<td>Specifies the employee’s hourly status (for example, apprentice, expert, master).</td>
</tr>
<tr>
<td>Effective Beginning</td>
<td>Specifies the date the status takes effect.</td>
</tr>
<tr>
<td>Notes</td>
<td>Records a note with the status change.</td>
</tr>
</tbody>
</table>
Maintaining Employees

**Employment Status Tab**

The Employment Status tab allows you to view an employee’s active status as well as status type (for example, permanent, on leave, disciplinary action, and so on), the effective date of the status, and the date of hire. This window displays the employee’s employment status history. An area for notes is also available.

Click the **Change** button to modify the employee’s active status in the Change Active Status Properties window. Active and terminated status types are defined for your company at installation.

Complete the fields in this window as shown below.
Field | Description
--- | ---
Active Status | Specifies whether the employee is active or terminated.
Active/Terminated Status Type | Specifies the employee’s status type (for example, permanent, on leave, and so on).
Effective Beginning | Specifies the date the status takes effect.
Notes | Records a note. For example, you can note why an employee’s status changed.

Corrective Actions Tab

The Corrective Actions tab is available from the employee’s Personal Information folder, depending on your system setup and access rights. You can use this tab to see the corrective action status of each employee. Corrective actions are used with the optional Incidents & Points module. For more information about the Incidents & Points module, see Using Management Information in the Attendance Enterprise documentation set.

Alternatively, you can use this tab to record another type of status for your employees; the rest of Attendance Enterprise is not affected.

![Corrective Actions Tab](image)

To change the corrective action status click Change. The Indicate Corrective Action to Take window is displayed. You can review the previous corrective action and the date it was taken.
Choose the new corrective action status and the effective date, adding a note if needed. Click OK to record the corrective action.

**Updating Employee Picture**

The Picture tab allows displays the employee’s photograph and the date it was entered.

To specify a different picture, click the Change button and select a photograph from the file selection list.
When you select the image file and click Open, Attendance Enterprise places the image on the picture tab and updates the picture tab fields.

The image can be in GIF, JPEG, PCX, BMP, or PNG formats. You cannot remove a picture; it can only be replaced.

Terminating and Reinstating Employees

Part of the routine maintenance of your employee database is to enter appropriate data when employees are terminated or rehired. Use the terminate and reinstate functions to keep the employee database accurate.

Terminating an Employee

When an employee leaves the company, you must terminate him or her in Attendance Enterprise. The ID usually stays with the employee’s information, even after termination. Attendance Enterprise uses the ID to access archived and historical data about the terminated employee.

To terminate an employee:

1. Click on the Employment Status tab of the Personal Information window.
2. Click Change. The Change Active Status Properties window is displayed.

3. Change the Active Status to Terminated.
4. Choose the Active Status type. These vary by company.
5. Choose the Effective Beginning date.
6. Click OK to complete the change. Attendance Enterprise displays the Employee Badge Maintenance window.
7. Choose what to do with the terminated employee’s badge. Options are:

<table>
<thead>
<tr>
<th>If you choose...</th>
<th>The badge...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nothing</td>
<td>Remains active and is still assigned to this employee.</td>
</tr>
<tr>
<td>Inactivate</td>
<td>Remains valid but not active.</td>
</tr>
<tr>
<td>Revoke</td>
<td>Becomes permanently invalid.</td>
</tr>
<tr>
<td>Release</td>
<td>Remains active and is available to be reassigned to a different employee.</td>
</tr>
</tbody>
</table>

When you terminate an employee, Attendance Enterprise automatically removes his or her schedule. This way, schedule reports and the schedules window do not show schedules that will never be worked.

**Reinstating an Employee**

To reinstate an employee, follow the same procedure as in Terminating an Employee (see page 71). Instead of changing the Active Status to Terminated in step 3, change it to Active. Also update the Active Status Type.

**Note:** If personal information such as address or pay rate has changed, update the pages in the Personal Information window. See page 51.

You can also review terminated employee information by right-clicking on the Employees folder, selecting Terminated Employees, and selecting the employee from the employee list. Each terminated employee has a special icon: 🏷️. Return to viewing active employees by right-clicking again on the Employees folder and selecting Active Employees or All Employees. Selecting All Employees shows employees in the Attendance Enterprise system whether they are active or terminated.
Summary

Attendance Enterprise simplifies the primary task of human resources: maintaining employee information. Attendance Enterprise provides the Find Employee function for rapid location of an individual by name, ID, or badge number. Additionally, you can select an employee from any exception view. When an employee is located, Attendance Enterprise allows you to view employee information in a variety of ways. You can review an employee’s personal information, time card, schedule, year-to-date history, or archived time card. You can also import employee data from other applications.
Chapter 4
Using Employee Benefits

This chapter describes how to maintain and use employee benefits in Attendance Enterprise. It explains how Attendance Enterprise manages benefits and employee leaves of absence. It describes how to make adjustments to available benefit amounts and generate benefit reports for print or electronic distribution.

Understanding Benefits and Benefit Banks

To accurately interpret benefit windows and reports, you need to know what benefits are and how Attendance Enterprise tracks them. This section provides an overview of benefits in Attendance Enterprise including:

- Benefit definitions
- Benefit banks
- Decremented or accrued benefits
- Family and Medical Leave Act (FMLA) benefits

Benefits

Attendance Enterprise supports up to 10 benefits. Benefits come in several forms. Typical benefit types are:

- Paid, non-worked time, like a vacation or sick day
- Unpaid time off, like a leave of absence
- Monetary allowance, like a meal allowance

Benefit Banks

Attendance Enterprise maintains available benefit amounts in individual employee benefit banks. Each employee has a separate bank for each benefit type earned.

When a paid time off benefit (for example, vacation time) is earned or granted, the benefit hours or dollars are added to the benefit bank. When the employee
uses the benefit, the benefit is subtracted from the benefit bank and the time card is credited with the benefit pay.

**Decremented or Accrued Benefits**

Attendance Enterprise supports two types of benefits: decremented and accrued. They differ in how the benefit amounts are calculated and credited to the benefit banks.

*Decremented* benefits are calculated manually. The payroll manager or supervisor determines the amount to grant each employee and manually credits the benefit banks.

Attendance Enterprise automatically maintains *accrued* benefit banks. It calculates amounts owed to employees based on company policy and automatically credits benefit banks.

For either benefit type, the bank is debited when an employee uses the benefit. This happens when a supervisor credits the time card with the benefit pay designation or schedules benefit time for an employee, for example, personal or vacation time that is scheduled in advance.

Regardless of the benefit type used, payroll managers or system administrators can adjust benefit balances if necessary.

**FMLA Benefits**

Attendance Enterprise tracks eligibility and hours for leaves of absence that meet the criteria for the Federal Family and Medical Leave Act (FMLA). The FMLA benefit is different from other benefits because the pay designation (usually unpaid) is used for time tracking purposes only. However, FMLA hours are designated on the time card like any other benefit.

When an employee’s FMLA leave begins, the supervisor specifies the first use of the FMLA benefit. Attendance Enterprise marks the first use date and establishes the subsequent timeframe in which leave hours can be used. For further information on editing a time card to include FMLA benefits, see *Performing Time Card Functions* in the Attendance Enterprise documentation set.

**Maintaining Benefit Banks**

You can review and adjust benefit bank balances through the Benefits tab of the employee’s Personal Information and the Benefits folder.
Viewing Benefit Balances in the Benefits Folder

The Benefits folder in the Employees folder contains a benefits view for each employee. This view displays employment history detail for the selected date range. Point information can be displayed if the Incidents & Points module is used.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Description</th>
<th>Weight</th>
<th>Points</th>
<th>Running Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
</tbody>
</table>

Describe the type of event that occurred. Types of events can include exceptions, payments, benefit activity, and beginning and ending balances. If the Incidents & Points module is used, corrective actions are listed.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Description</th>
<th>Weight</th>
<th>Points</th>
<th>Running Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/17/05</td>
<td>Correction Action</td>
<td>Vac/Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Correction Action</td>
<td>100.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Ending Balance</td>
<td>Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Ending Balance</td>
<td>Sick</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Ending Balance</td>
<td>Personal</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Ending Balance</td>
<td>July</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Ending Balance</td>
<td>Breach</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
</tbody>
</table>

Description gives details about the event that occurred.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Description</th>
<th>Weight</th>
<th>Points</th>
<th>Running Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
</tbody>
</table>

Weight lists the weight of any exceptions.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Description</th>
<th>Weight</th>
<th>Points</th>
<th>Running Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
</tbody>
</table>

Running weights lists the running total of weights associated with exceptions.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type</th>
<th>Description</th>
<th>Weight</th>
<th>Points</th>
<th>Running Weights</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
<tr>
<td>07/17/05</td>
<td>Benefit Activity</td>
<td>40.00 - Vacation</td>
<td>0</td>
<td>5.0</td>
<td></td>
</tr>
</tbody>
</table>

Points lists the points associated with an event if the Incidents & Points module is used.

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Using Employee Benefits

**Column**  **Description**
Running Points  Lists the running total of points if the Incidents & Points module is used.

The bottom portion of the employee’s benefits view displays activity for each of the benefit banks. The Vacation tab is displayed in this example.

**Column**  **Description**
Date  Lists the date of the benefit bank activity.
Credit  Lists the amount credited with this transaction.
Debit  Lists the amount debited with this transaction.
Balance  Lists the benefit bank balance.
Description  Lists further details about the benefit bank activity.

Leave requests can be accessed on the Leave Requests tab.

<table>
<thead>
<tr>
<th><strong>Leave Requests</strong></th>
<th><strong>Vacation</strong></th>
<th><strong>Sick</strong></th>
<th><strong>Personal</strong></th>
<th>** Jury Duty**</th>
<th>** Bereavement**</th>
<th>** Holiday**</th>
<th>** Vacation Adv**</th>
<th>** Benefit 09**</th>
<th>** Benefit 10**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partial Day</td>
<td>07/28/00</td>
<td>4.0000</td>
<td>Pending</td>
<td>Sick</td>
<td>Dr. Appr</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Column**  **Description**
Period  Describes whether the leave request is for a partial day, day, or range of days.
From/To  Describes the date or date range of the request.
Amount  Describes the amount of requested leave hours.
State  Describes the state of the leave request. Possible states include Submitted/Pending, Approved, or Unapproved.
Type  Describes the type of time off the employee is requesting. This type can be associated with a benefit, a pay designation, or neither.
### Column Description

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Lists the comment made, if any, when the employee requests leave or when the supervisor requests leave for an employee.</td>
</tr>
</tbody>
</table>

Use the Customize Current View toolbar command to select the information to display in the employee’s benefit folder using the Employment History Presentation Details window.

Complete information about the selections in the Employment History Presentation Details window is included in *Printing Reports* in the Attendance Enterprise documentation set.

**Viewing Benefit Balances in the Personal Information Window**

The Benefits tab has two subtabs that show balances for the current pay period and running daily balances over a selected time period.

**Viewing Benefits by Pay Period**

The Pay Period Balances subtab shows activity for benefits made effective by pay period. For example, Sue takes a vacation day at the beginning of a pay period, even though her vacation benefit bank has a balance of 0:00. Sue knows that she is due one vacation day. Human resources credits her account 8 hours of vacation time at the end of the pay period. Because balances in her company are calculated by pay period, Sue’s benefit bank never shows a negative balance.

Credited or debited benefit hours can become available at the beginning of this pay period or next pay period, depending on your company’s benefit policies.
Viewing Benefits by Daily Running Balances

To view benefits by daily balances, use the Running Balances tab. This tab is used for benefits that change by day instead of by pay period: accrued benefits (those Attendance Enterprise automatically calculates using the Benefit Accruals Module) and some decremented benefits. The layout is like your checkbook register. Each day something is added or subtracted, a new balance is entered. Benefit hours can be added automatically or manually.

Note: You may not see anything on this tab, depending on way your organization grants benefits.
Using Employee Benefits

Getting Started with Attendance Enterprise

Adjusting Benefit Balances in the Personal Information Window

An employee’s benefit balances are changed in his or her Personal Information window on the Benefits tab. For example, Satish earns 40:00 hours of vacation on his one-year anniversary with the company. His manager can credit his vacation benefit bank with 40:00 hours.

Benefit balances can also be debited. For example, Yvonne’s manager accidentally credits her with 8:00 additional hours of sick time. These hours can be debited here.

Finally, a new balance can be entered. Adjusting benefits changes the bank balance without affecting an employee’s time card.

Note: To pay an employee for benefit time taken (for example, to pay an employee for a vacation day), use the Credit/Debit Non-Worked Time button in the time card. For more information, see page 87.
To change a benefit balance:

1. Right-click on the benefit pay period. Select Change Benefit Balance from the shortcut menu. Then:

<table>
<thead>
<tr>
<th>Select…</th>
<th>To…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit</td>
<td>Add a benefit amount to the benefit bank.</td>
</tr>
<tr>
<td>Debit</td>
<td>Subtract a benefit amount from the benefit bank.</td>
</tr>
<tr>
<td>New Balance</td>
<td>Enter an initial benefit amount, usually at the beginning of the year.</td>
</tr>
</tbody>
</table>

2. When you select an option, the Adjust Benefit Balance window is displayed with the selected option in the Adjustment field.
3. Complete the fields for the Basic tab as described in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit</td>
<td>Specifies the benefit to be adjusted.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>Specifies the date when the benefit adjustment takes effect.</td>
</tr>
<tr>
<td>Adjustment</td>
<td>Specifies the type of adjustment. When an adjustment type is selected at the Change Benefit Balance shortcut menu, the adjustment selected appears in this field.</td>
</tr>
<tr>
<td>Amount</td>
<td>Specifies the amount of the benefit adjustment. The adjustment appears as hours or dollars depending on whether the benefit represents hour or dollar amounts.</td>
</tr>
</tbody>
</table>

4. Select the Reasons tab.
5. Choose a reason for the benefit balance adjustment and click OK. Try to be consistent about the types of reason codes you use. This improves the quality of the data, should you choose to review reasons for benefit balance adjustments.

6. Click OK.

**Importing Benefits**

You can import benefit balances from a file. Imported benefits are decremented benefits (benefits that are subtracted from an initial fixed benefit amount) rather than accrued benefits (benefits that accumulate through the year). You can do this if your benefits are maintained by another application. Use the Employee Benefits Import task to import benefit balances. If benefit balances are regularly imported this task is set up at installation.

See your system manager for information about defining and executing tasks. Attendance Enterprise tasks are documented in *Managing Your System*.

**Viewing Benefits in the Time Card**

You can also review benefits (but not make changes) in the employee time card by clicking the Review Benefits button on the time card toolbar. When you click on the Review Benefits button, the Benefit window for the selected employee is displayed. The This Period and Detail tabs offer two ways to view this information.
Using Employee Benefits

Reviewing Benefits with the This Period Tab

Scroll through this window to view the employee’s benefit use.

The following table describes the columns on the This Period tab.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit</td>
<td>Specifies the benefit name.</td>
</tr>
<tr>
<td>Available at</td>
<td>Specifies the benefit amount available as of the beginning of the current pay period and includes the benefit amount earned during this period.</td>
</tr>
<tr>
<td>Paid</td>
<td>Specifies the benefit amount credited to the time card.</td>
</tr>
<tr>
<td>Unpaid</td>
<td>Specifies the amount requested but unpaid due to insufficient balance.</td>
</tr>
<tr>
<td>Remaining</td>
<td>Specifies the amount of benefit remaining after the current time card is calculated.</td>
</tr>
</tbody>
</table>
Reviewing Benefits with the Detail Tab

Use the Detail tab to view credits and debits to each benefit bank individually. For example, here you see a Vacation benefit bank for Joseph Adolph. If you click on the arrow buttons you can scroll through your company’s benefit types. You can also click on a benefit type along the top of the window to jump to that benefit.

The following table describes the columns on the Detail tab.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity</td>
<td>Specifies the type of activity in the benefit bank.</td>
</tr>
<tr>
<td>Date</td>
<td>Specifies the date that benefits hours or dollars were added, subtracted, or used.</td>
</tr>
<tr>
<td>Credit</td>
<td>Specifies the amount of hours credited to the benefit bank.</td>
</tr>
<tr>
<td>Debit</td>
<td>Specifies the amount of hours debited from the benefit bank.</td>
</tr>
<tr>
<td>Balance</td>
<td>Specifies the unpaid balance of the benefit.</td>
</tr>
<tr>
<td>Details</td>
<td>Specifies more details about the usage or supervisor edit.</td>
</tr>
</tbody>
</table>

Paying Benefits to Employees in the Time Card

To pay benefits to an employee you can credit non-worked time to the employee or schedule a benefit.
Crediting Non-Worked Time

*Non-worked time* is time that an employee is not at work, but is still compensated. If your organization offers paid vacation days, this is paid non-worked time. These are considered benefit hours. Employees are reimbursed for paid non-worked time using the Credit Non-Worked Time button from the Time Card window.

To pay an employee for benefit hours:

1. Browse to an employee’s time card.
2. Click the Credit/Debit Non-Worked Time button in the Time Card toolbar.
3. The Credit/Debit window is displayed.
4. Choose the date.
5. Select the benefit type from the Pay Designation field.
6. Choose the workgroup set, shown here as LOC-DEPT-SFT.
7. Enter the number of hours to pay.
8. Enter the pay rate.
9. Click OK.
10. The benefit time is shown on the time card on the proper date and is reflected in the period and daily totals.
Benefits can be debited in the same way if you make a mistake. For more information, see *Performing Time Card Functions* in the Attendance Enterprise documentation set.

**Scheduling a Benefit**

You can also pay benefit hours by scheduling a benefit.

To schedule a benefit:

1. Browse to the employee’s Schedules folder.
2. Right-click in the calendar on the correct day.
3. Choose Benefit, then the benefit type you want.
4. The benefit is scheduled for a default of 8:00 hours.
5. To change the scheduled amount of benefit hours, double-click on the schedule entry.
6. The Schedule Properties window is displayed.
7. Change the Amount and click OK.

**Note:** For more information about scheduling employees, see Scheduling Employees & Managing Leave in the Attendance Enterprise documentation set.

### Understanding Leave Management

Leave management is the process of employees requesting time away from their work schedules. Most often, employees use the leave management process to request vacation days or a partial day off to attend to personal matters. Attendance Enterprise keeps track of leave requests, whether they are approved or denied, and from there can schedule the employee’s leave time.

If you approve a leave request, employee schedules are changed from standard work schedules to absence planned schedules. An absence planned schedule can result in the use of an employee’s benefits.

Leave management features are discussed in several InfoTronics documents.

*If you want to...*  
*Consult...*

Submit a leave request for yourself  
*Attendance Enterprise Employee Self Service*
### If you want to…

<table>
<thead>
<tr>
<th>Action</th>
<th>Consult…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit a leave request for one of your employees</td>
<td>Attendance Enterprise Management Self Service, if you use MSS, or Scheduling Employees &amp; Managing Leave, if you use Attendance Enterprise</td>
</tr>
<tr>
<td>Review employee leave requests</td>
<td>Attendance Enterprise Management Self Service, if you use MSS, or Scheduling Employees &amp; Managing Leave, if you use Attendance Enterprise</td>
</tr>
</tbody>
</table>

### Summary

Typical employee benefits include paid time off, unpaid time off, and monetary allowances. Attendance Enterprise supports up to 10 benefits in employee benefit banks, and each benefit is associated with a pay designation. You can review benefits from the employee time card, the Benefits folder, or in Personal Information, where you can also adjust benefit balances. You can also import benefit information from other applications using the Employee Benefits Import task. Leave management is a way to facilitate the leave request process which can result in the scheduling of benefits.
Chapter 5
Creating Reports

Attendance Enterprise offers many valuable reports in several formats. Reports present employee schedule and personal information, labor management data, and security access information. Reports can be viewed on the computer screen, printed, saved to a file, or e-mailed, depending on the type of report. Reports can be created as:

- Reports
- Summary Sheets
- YTD History Views
- Budget Reports

Reports

Over 40 predefined reports in Attendance Enterprise show information in a standard format. These reports can be printed, saved to a file, e-mailed, or simply viewed on your computer screen. You customize the way information is shown and the content of the reports. For more information about reports, see Printing Reports in the Attendance Enterprise documentation set.

<table>
<thead>
<tr>
<th>Absentee Unscheduled Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Includes selected work groups for all employees.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Current Period</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>In</th>
<th>Out</th>
<th>In</th>
<th>Out</th>
<th>Hours</th>
<th>Schedule</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/14/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Work</td>
<td></td>
</tr>
<tr>
<td>07/15/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Absent</td>
<td></td>
</tr>
</tbody>
</table>

| Add. . . . Philip | ID: 010015 | Badge: 176 |

<table>
<thead>
<tr>
<th>Date</th>
<th>In</th>
<th>Out</th>
<th>In</th>
<th>Out</th>
<th>Hours</th>
<th>Schedule</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/14/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Work</td>
<td></td>
</tr>
<tr>
<td>07/16/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Absent</td>
<td></td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Date</th>
<th>In</th>
<th>Out</th>
<th>In</th>
<th>Out</th>
<th>Hours</th>
<th>Schedule</th>
<th>Exceptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/12/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Vacation</td>
<td></td>
</tr>
<tr>
<td>07/13/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Vacation</td>
<td></td>
</tr>
<tr>
<td>07/16/95</td>
<td>0:30</td>
<td>18:46</td>
<td></td>
<td></td>
<td></td>
<td>Absent</td>
<td></td>
</tr>
<tr>
<td>07/16/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Work</td>
<td></td>
</tr>
<tr>
<td>07/16/95</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Absent</td>
<td></td>
</tr>
</tbody>
</table>

Getting Started with Attendance Enterprise 91
Summary Sheets

Summary sheets show pay designations, exceptions, and benefit summaries for a group of employees. You choose the time period, the employees, and the data shown. For more information about summary sheets, see *Using Management Information* in the Attendance Enterprise documentation set.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Badge Number</th>
<th>From 07/04/05 to 07/10/05</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams, Philip</td>
<td>176</td>
<td>81.00 1.00</td>
</tr>
<tr>
<td>Adolph, Joseph</td>
<td>177</td>
<td>82.00 1.76</td>
</tr>
<tr>
<td>Alexander, David</td>
<td>138</td>
<td>27.75 1.00</td>
</tr>
<tr>
<td>Anthony, Andrew</td>
<td>131</td>
<td>40.00 1.50</td>
</tr>
</tbody>
</table>

YTD History Views

YTD (Year-to-Date) History views show a year of data for each employee. The YTD History can be set to show schedule exceptions, pay designations, supervisor adjustments, and benefit hours. You decide upon the focus of the YTD History view. For more information about the YTD History window, see *Using Management Information* in the Attendance Enterprise documentation set.
Budget Views

Budget views show budgeted and scheduled hours for a group of employees. This helps you to avoid over- or under-scheduling, and controls labor costs. For more information about budget views, see *Using Management Information* in the Attendance Enterprise documentation set.

<table>
<thead>
<tr>
<th>Date</th>
<th>Budgeted Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sun Nov 26 05</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Performance from Sun Nov 26 05 to Sat Dec 02 05

<table>
<thead>
<tr>
<th>Item</th>
<th>Budget</th>
<th>Scheduled</th>
<th>Actual</th>
<th>Act v. Sch</th>
<th>Bud v. Sch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>100.00</td>
<td>119.00</td>
<td>15.25</td>
<td>-103.75</td>
<td>19.00</td>
</tr>
</tbody>
</table>

Summary

A key benefit of Attendance Enterprise is its reporting capabilities. Attendance Enterprise includes a wide range of preformatted reports that cover valuable employee information such as comprehensive employee data, employee transfer rates, and benefits. The user can also generate a custom report by selecting a number of fields covering information throughout Attendance Enterprise such as pay designations, exceptions, supervisor edits, budgets, and pay periods.
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