MinistryWorks® by Brotherhood Mutual

Time & Attendance: Administrator & Supervisor Training

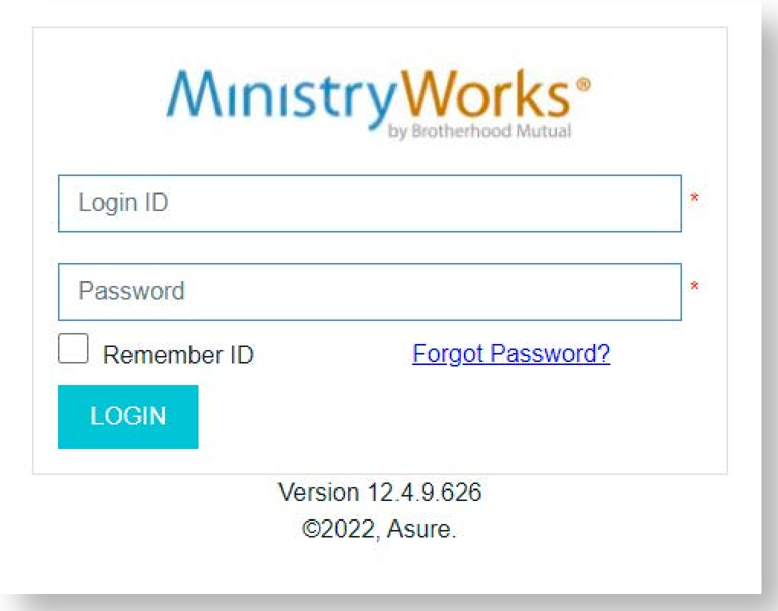
Rev. 3/23

Contents

Time & Attendance

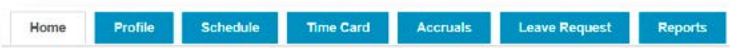
Login information

1. Web browser needs to be Google™ Chrome®.
    a. If using mobile Apple® products, the default browser must be set to Safari®.
2. Go to MWxxxx.asureforce.net – your unique URL is your MinistryWorks number (MW#).
3. Save the URL as a favorite on your internet browser.
4. Enter Login ID – the format is specific to each individual ministry.
5. Enter password – the initial password is the word “default” – the employee will be prompted to change immediately.



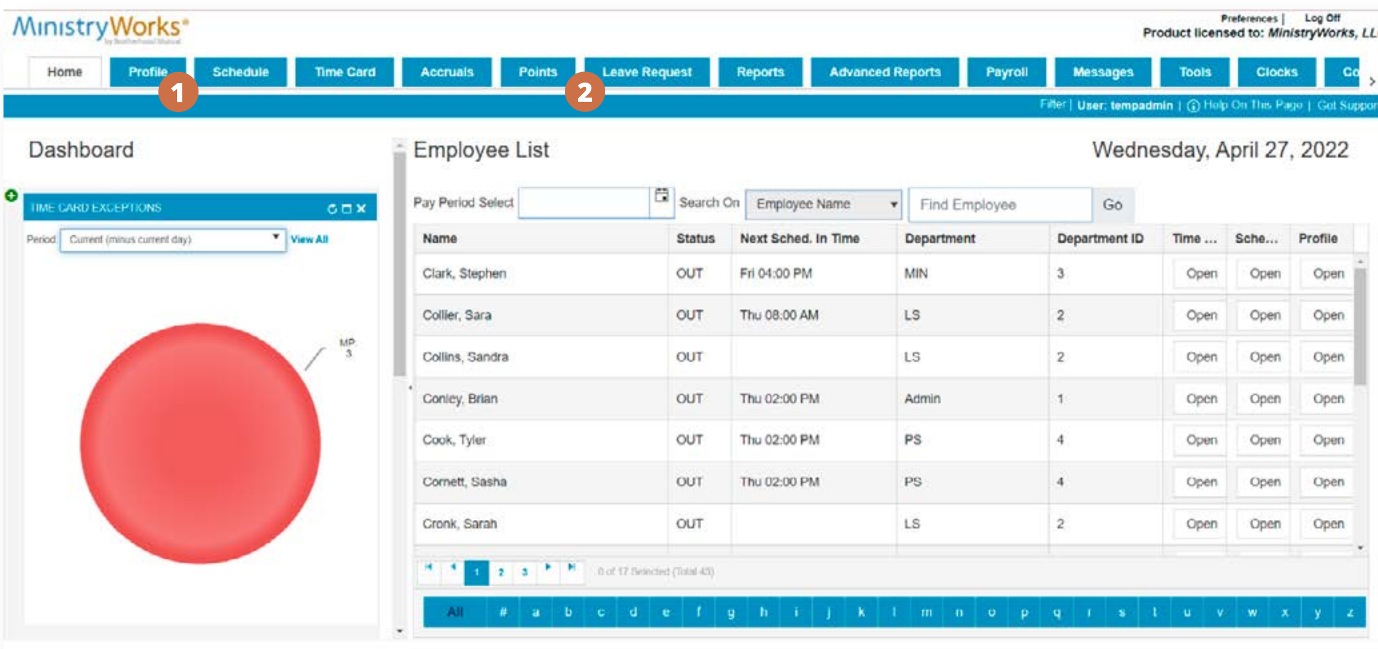
Basic Navigation of Time & Attendance

Home tab



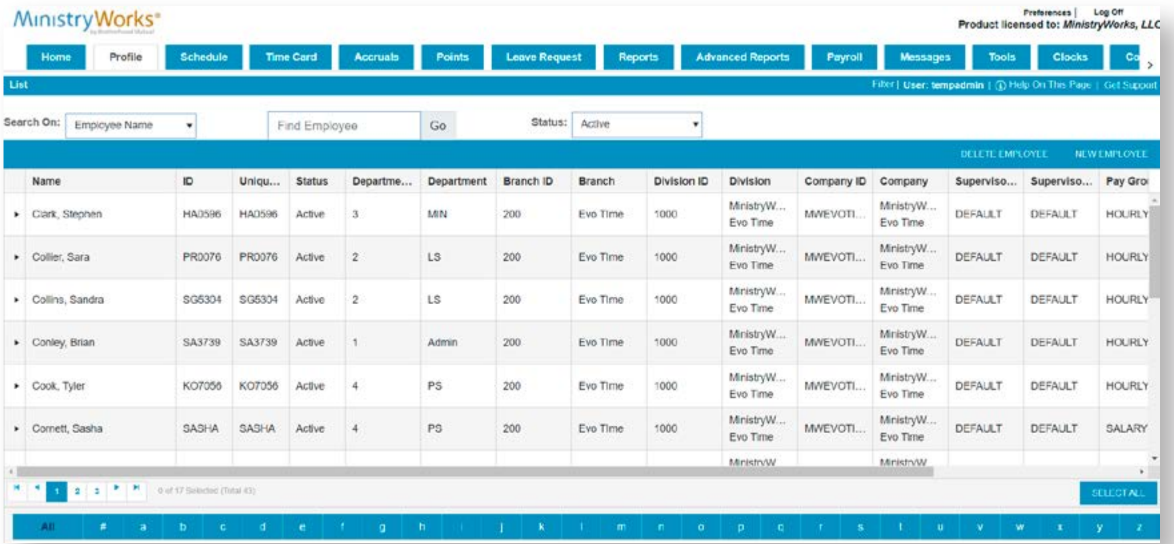
Once administrators and supervisors log in, the **Home** tab appears. The **Home** tab offers an overview of multiple sections.

1. The **Dashboard** has helpful gadgets that are relevant to completing payroll.
2. The **Employee List** displays each supervisor's Direct Report Employees along with quick links to each employee's time card, schedule, and profile.

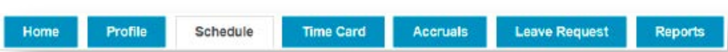


Profile tab

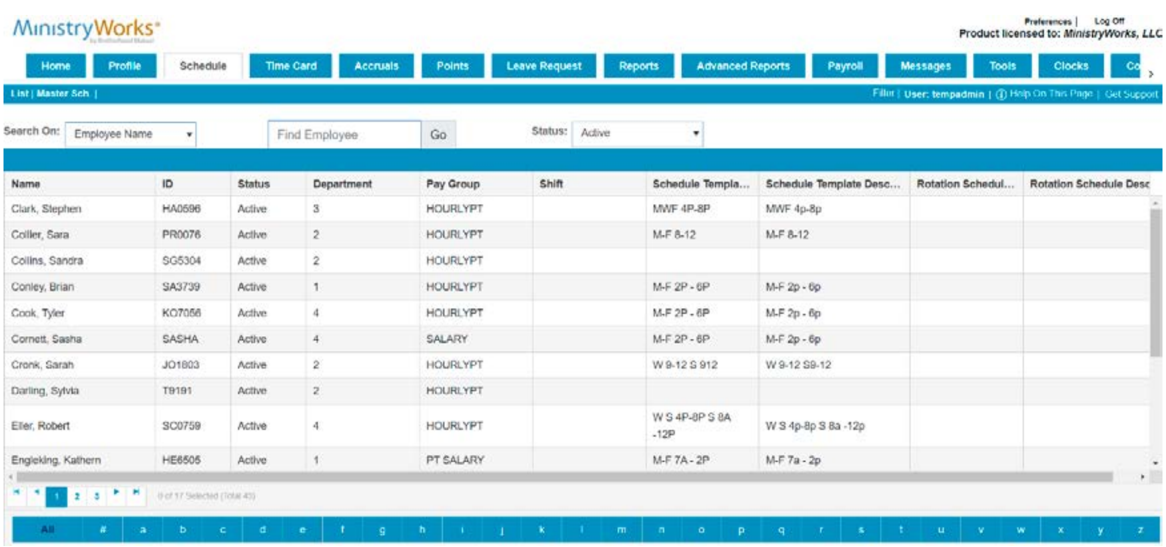
The **Profile** tab gives access to employee profiles. These details can be accessed by double-clicking on the row of any given employee.



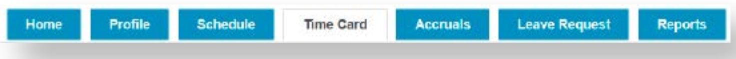
Schedule tab



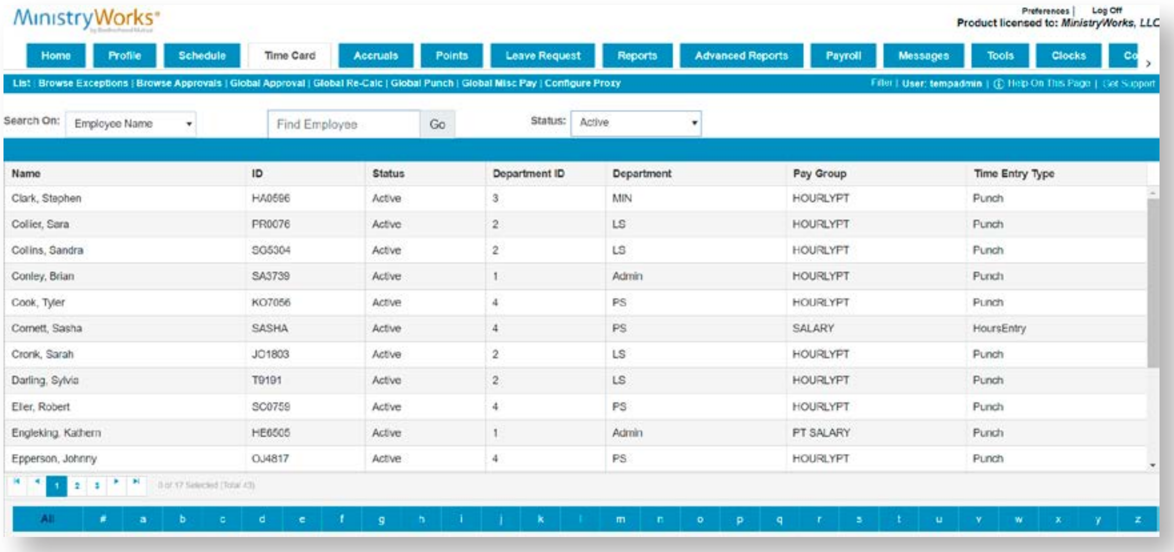
The **Schedule** tab allows for the creation, editing, and assignment of schedules.



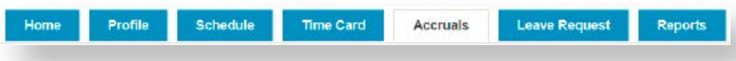
Time Card tab



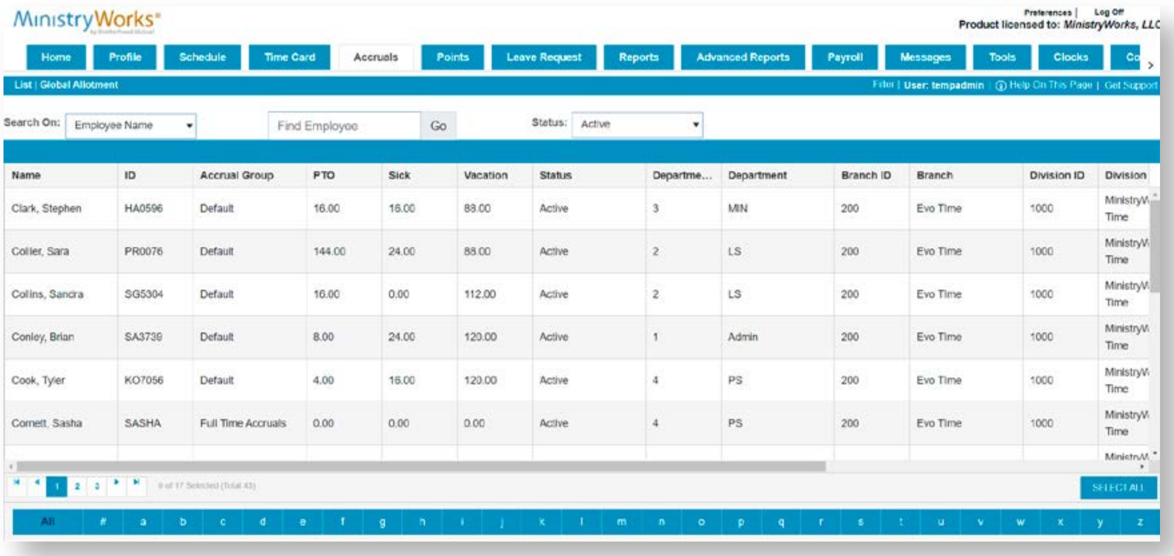
The **Time Card** tab provides access to time cards by double-clicking on the row of any given employee. Editing and approvals can be handled in this area.



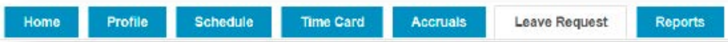
Accruals tab



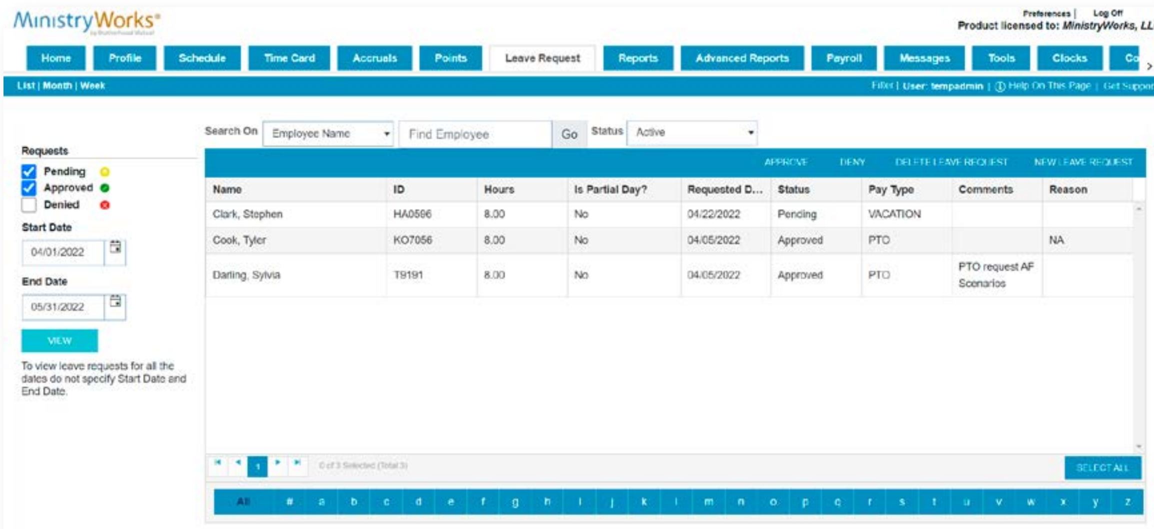
The **Accruals** tab shows available balances, history, and details of the employee's accruals. These details can be accessed by double-clicking on the row of any given employee.



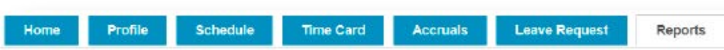
Leave Request tab



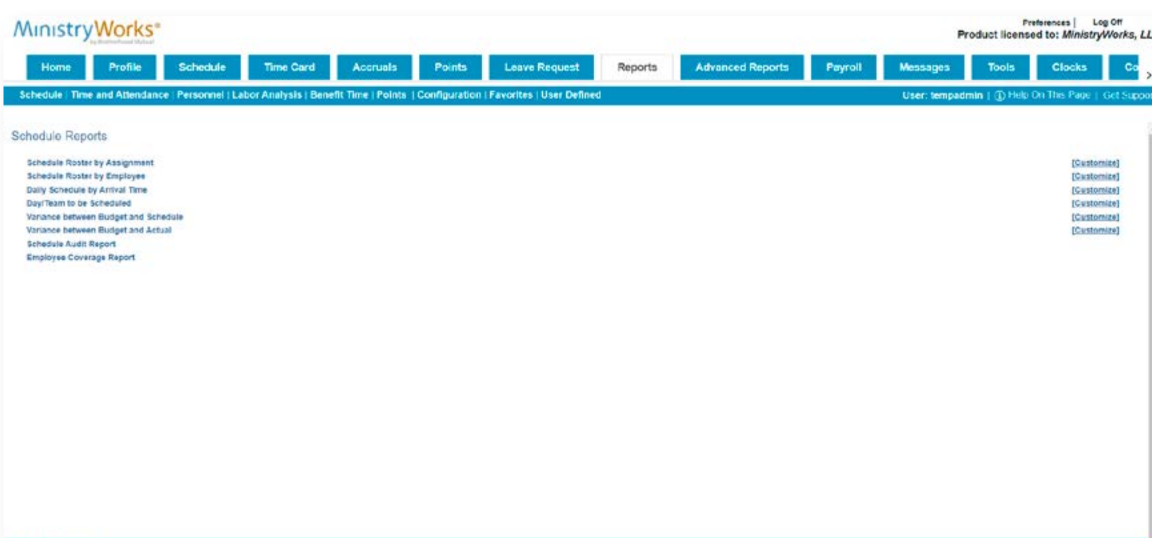
The Leave Request tab allows for the approval or denial of leave requests made by employees. Supervisors and administrators can also create leave requests on behalf of the employees in this area.



Reports tab



The Reports tab offers reports ranging from schedules, time detail, and many other options.

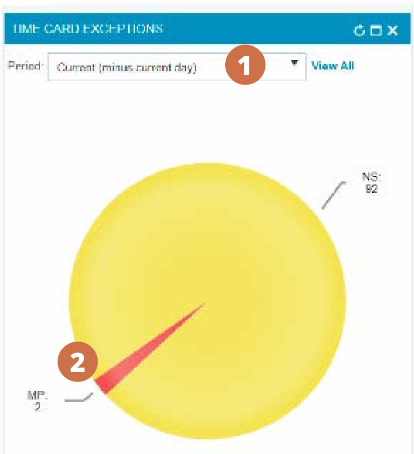


Payroll Preparation

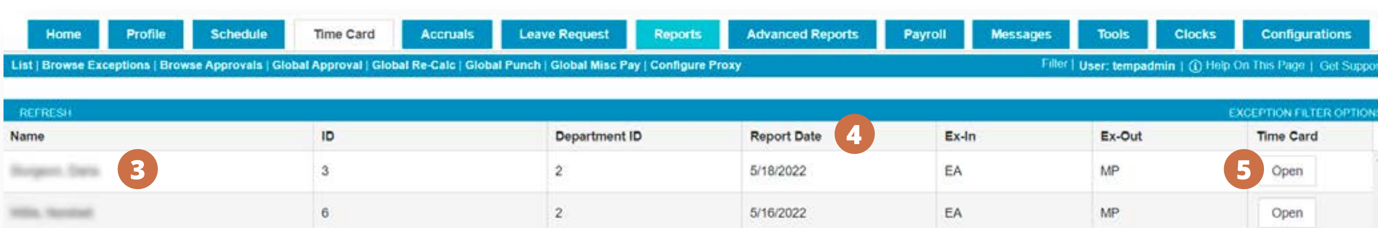
Time Card Exceptions (Home – Dashboard)

Missing Punches

1. **Period** – select the time frame for the punches that you want to review.
2. **Review Missing Punches (MP)** – click on the **Red** pie slice. This will take you to the employee(s) who are missing punches.

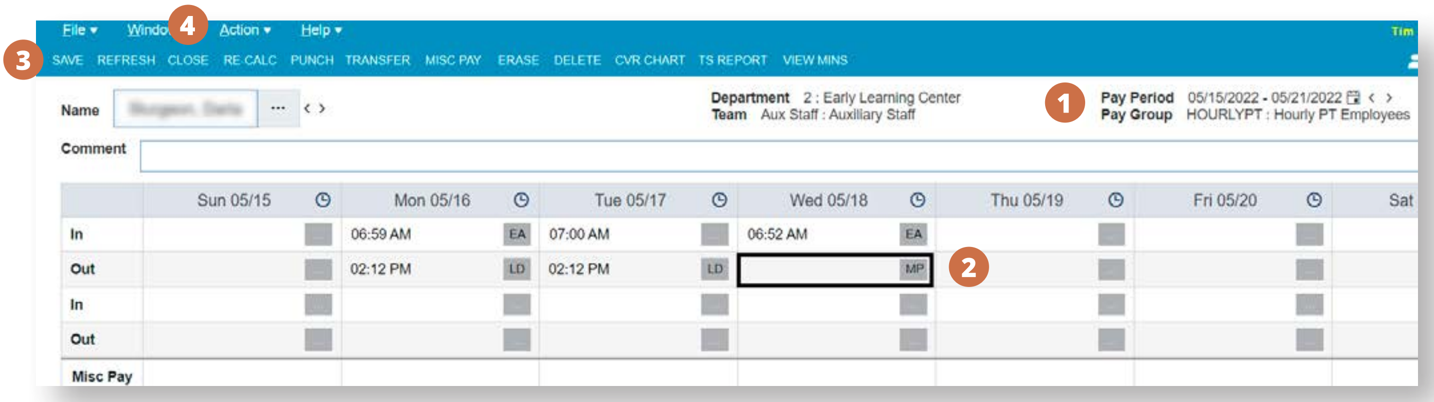


3. All employees that have missing punches will be shown.
4. Click on **Report Date** and address all missing punches prior to the current day.
   Note: Today's punches will also be shown and do not need to be resolved.
5. Click on **Open** to navigate to an individual's time card to resolve missing punches.



The employee's time card will be displayed.

1. Ensure you are in the correct pay period.
2. Manually enter missing punches.
3. Click **SAVE** after making changes.
4. Click **CLOSE** to close the time card.



When all missing punches have been resolved, navigate back to the **Home** tab.
The **Red** pie slice, within the **Time Card Exceptions** gadget, will have disappeared.

Additional Exceptions

1. **Not Scheduled (NS)** – Yellow pie slice. If schedules are not being used, this will be the default color of the pie. If schedules are being used, this means an employee punched on a day they were not scheduled.
2. **Early Arrival (EA)** – Green pie slice. If schedules are being used, this indicates that an employee punched in early.
3. **Late Arrival (LA)** – Pink pie slice. If schedules are being used, this indicates that an employee punched in late.
4. **Early Departure (ED)** – Grey pie slice. If schedules are being used, this indicates that an employee punched out early.
5. **Late Departure (LD)** – Purple pie slice. If schedules are being used, this indicates that an employee punched out late.

MinistryWorks®
by Brotherhood Mutual

Time Card – Hours Calculation Detail

From the time card, click F7 to view the applied rounding and/or meal deduction rules by pay period.

1. Actual **Punch In** and **Punch Out** times.
2. Rounded **Paid In** and **Paid Out** times.
3. **Rules Used** applied.

REFRESH CLOSE EXPAND ALL

Employee [illegible]
For Pay Period Friday, June 1 2 to Friday, July 08 2

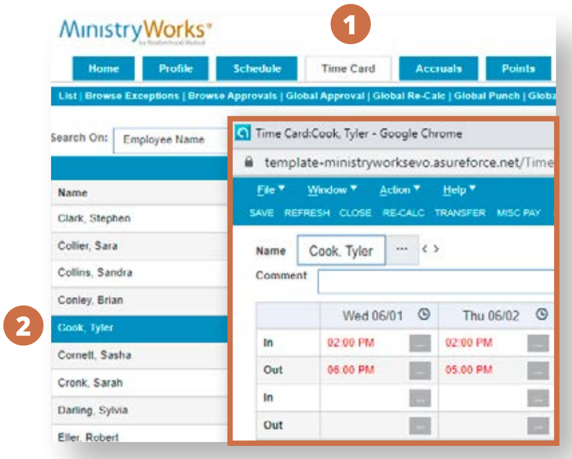
Report Date	Type	Punch In	Punch Out	Paid In	Paid Out	Sched In	Sched Out	Team	Break Min	Paid Break Min	Exc In	Exc Out	Job Id	Pay Type Id	Reg Hrs	OT1 Hrs	OT2 Hrs	OT3 Hrs	OT4 Hrs	Prem Hrs	Other Hrs	PPA Hrs	Rules Used 3
06/27/2022	P	05:09 PM	09:36 PM	05:15 PM	09:30 PM			F	0	0	NS			REG	4.25	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Rounding
06/28/2022	P	04:59 PM	08:33 PM	05:00 PM	08:30 PM			F	0	0	NS			REG	3.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Rounding
06/29/2022	P	04:51 PM	10:11 PM	04:45 PM	10:15 PM			F	0	0	NS			REG	5.50	0.00	0.00	0.00	0.00	0.00	0.00	0.00	Rounding

The above setup has a rounding that rounds each punch to the nearest 15-minute interval with 7 minutes being the mid-point.

Editing and Adding Punches to a Time Card

At times, supervisors & administrators may need to edit an employee's existing punches or add new punches on their time card.

1. Click on the **Time Card** tab.
2. Double-click on the applicable employee to access the time card.



Examples:

Example A: 6/1 The employee punched out at 6:00 PM but ended up staying until 7:00 PM.

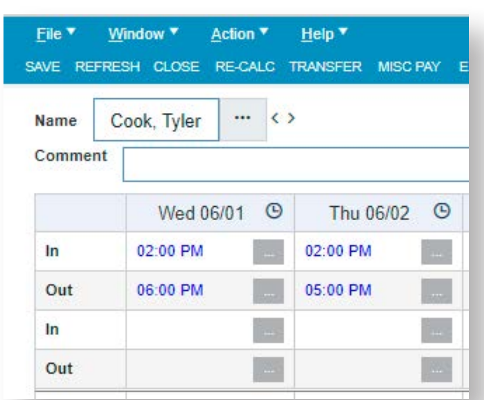
1. Edit – click on 6:00 PM cell and change to 7:00 PM.

Example B: 6/2 The employee punched in at 2:00 PM but was not needed until 5:00 PM, so they went home.

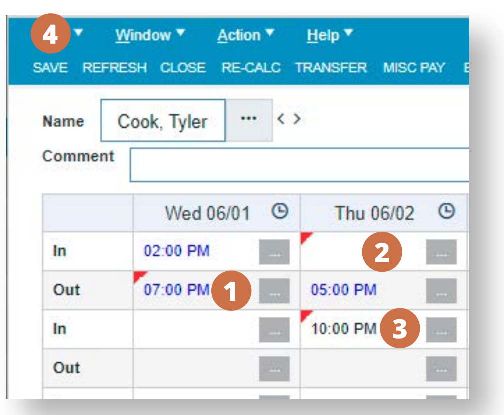
When they returned, they punched in again for the day at 5:00 PM. The employee then forgot to punch out at 10:00 PM.

2. Delete – click on the 2:00 PM cell and click *delete* on the keyboard.
3. Add – click on the next available cell to enter 10:00 PM.
4. Click **SAVE** – all edits are indicated with a red triangle until **SAVE** is clicked on the time card.

Before edits:



During edits:

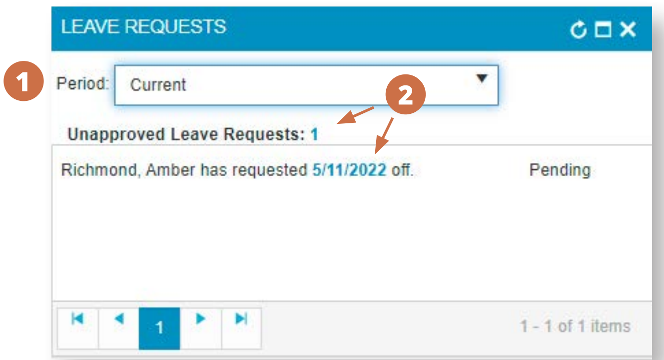


When all punches have been resolved, navigate back to the **Home** tab.

Leave Requests (Home – Dashboard)

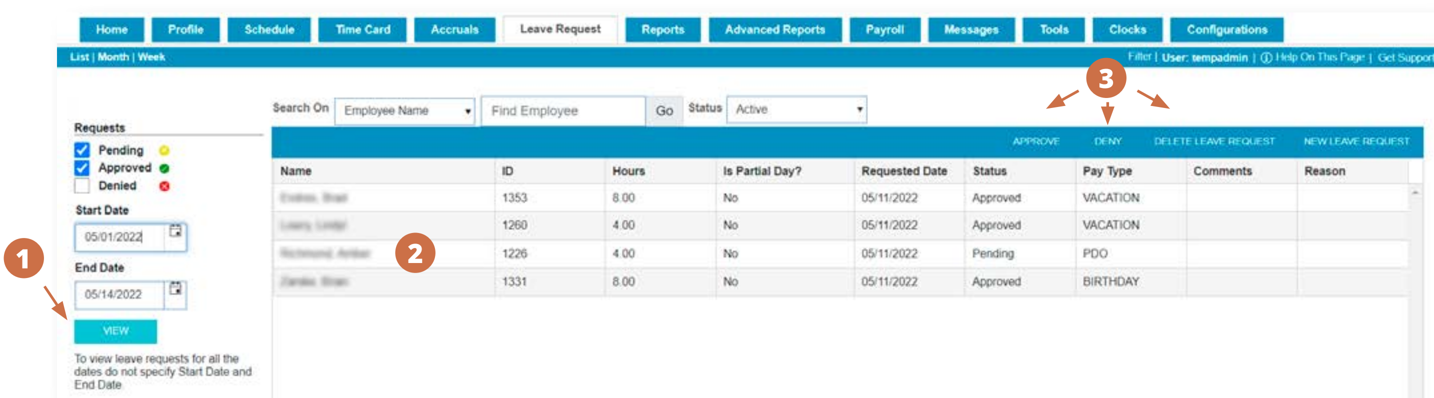
Approve/Deny/Delete Leave Requests

1. Period – select the time frame for the punches that you want to review.
2. Click on either the number of **Unapproved Leave Requests** or the date link.



The **Leave Requests** tab will open.

1. Edit **Start Date** and **End Date** to include the full pay period (or desired time frame). Click View.
2. Click on a specific employee that has a pending request. Multiple employees may be selected.
   Note: When a leave request is approved, denied, or deleted, an automated email is sent to the employee.
3. Select **APPROVE**, **DENY**, or **DELETE LEAVE REQUEST**. ** Only administrators have the **Delete** function.
   Note: When a leave request is approved/denied/deleted, an automated email is sent to the employee.



Once a request is approved, verify that the request transferred to the time card.

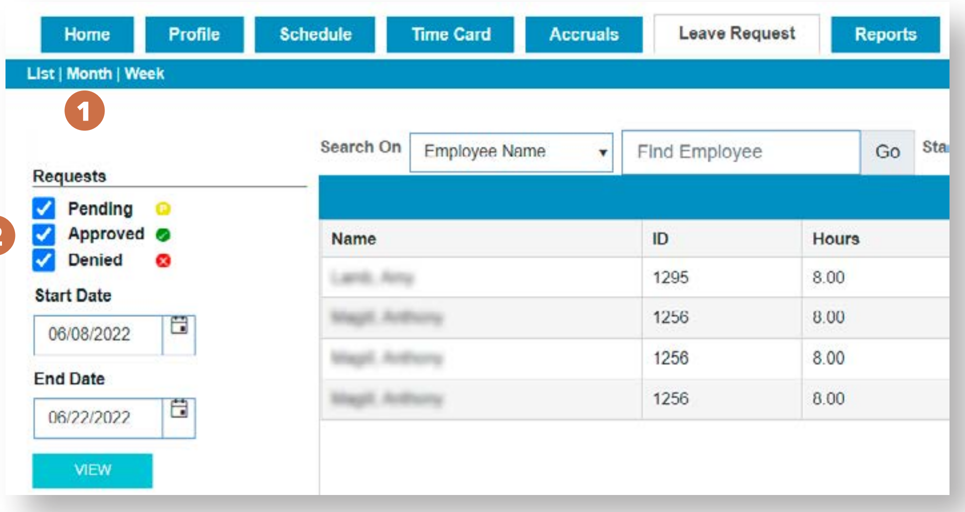
Note: Any leave requests submitted or approved on the day of, or for days prior to the requested day, will not transfer automatically to the time card. The time card must be saved again.

Click here to go to the **Time Card Validation** section.

Calendar View

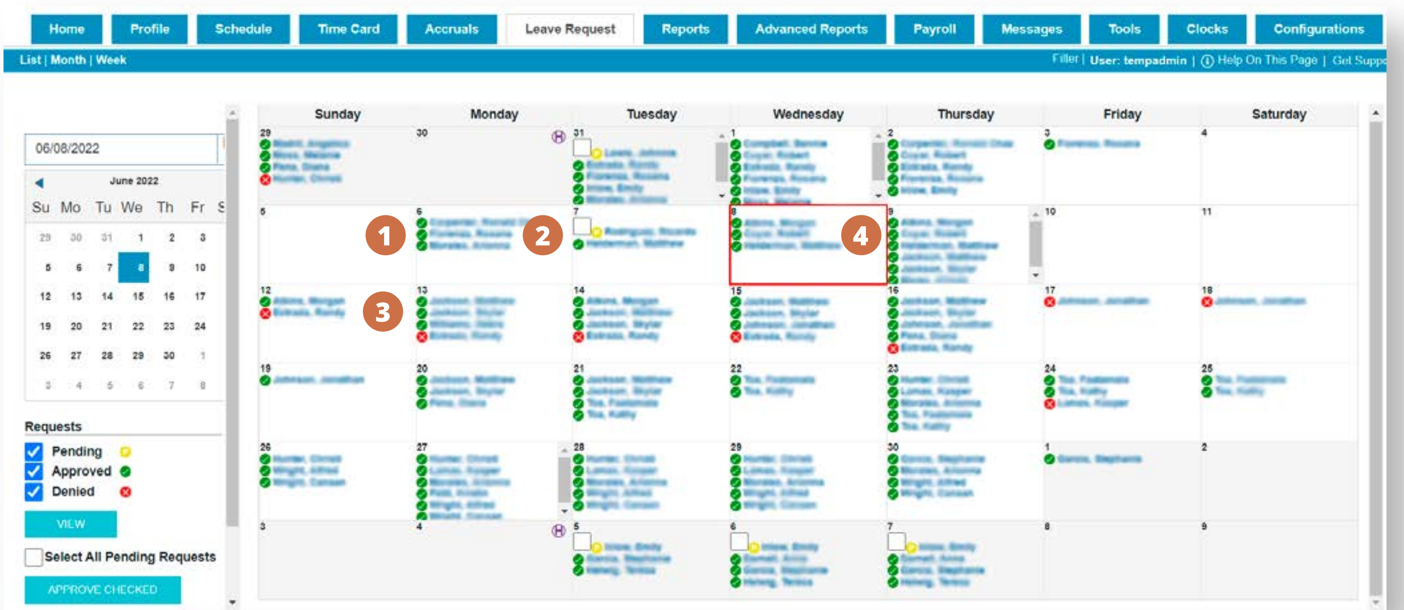
The **Calendar View** allows you to see all requests for each day for the entire month.

1. Click **Month**.
2. Check or uncheck desired request types: **Pending, Approved,** or **Denied.**



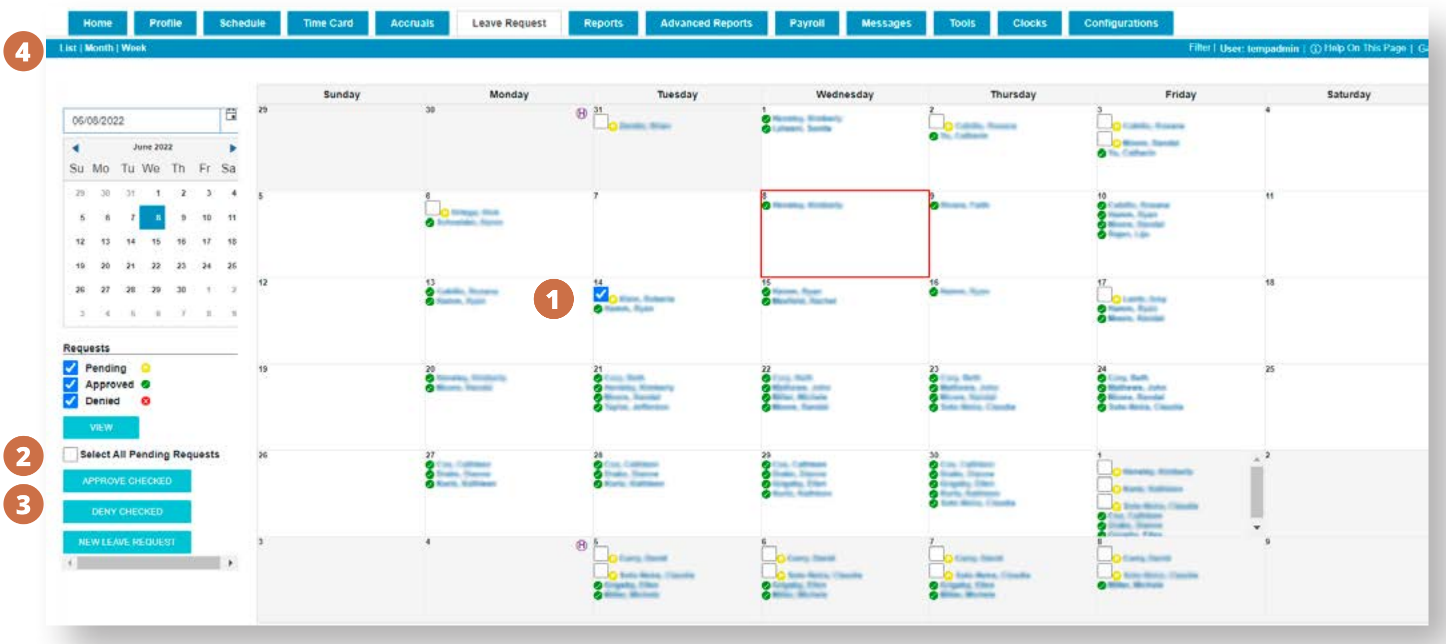
The **Calendar View** will be displayed.

1. Approved requests have a green check mark next to the employee's name.
2. Pending requests have a yellow **P** next to the employee's name.
3. Denied requests, if selected, have a red **X** next to the employee's name.
4. A red box indicates the current day.



Calendar View – Approve/Deny Leave Requests

1. To approve or deny from the **Calendar View**, click on the white box next to a pending request. A blue check mark will appear.
2. To approve all pending requests, click Select **All Pending Requests**.
3. Once applicable requests are selected, click **APPROVE CHECKED** or **DENY CHECKED**.
4. To exit the **Calendar View**, click on **List**.



Once a request is approved, verify that the request transferred to the time card.

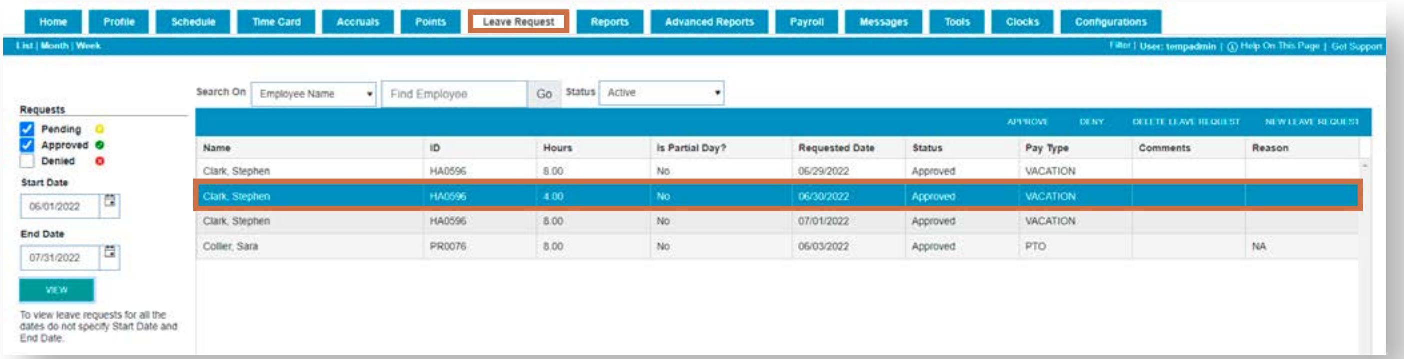
Note: Any leave requests submitted or approved on the day of, or for days prior to the requested day, will not transfer automatically to the time card. The time card must be saved again.

Click here to go to the Time Card Validation section.

Edit Leave Requests

At times, supervisors and administrators may need to edit leave requests on behalf of the employees.

From the **Leave Request** tab, double-click on the request that needs to be edited.

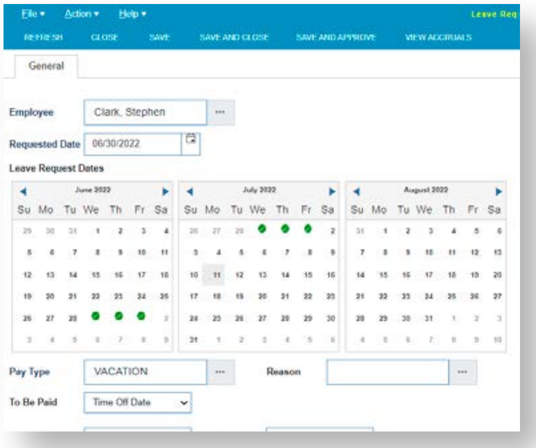


The **Leave Request** box will appear. Make edits as necessary.

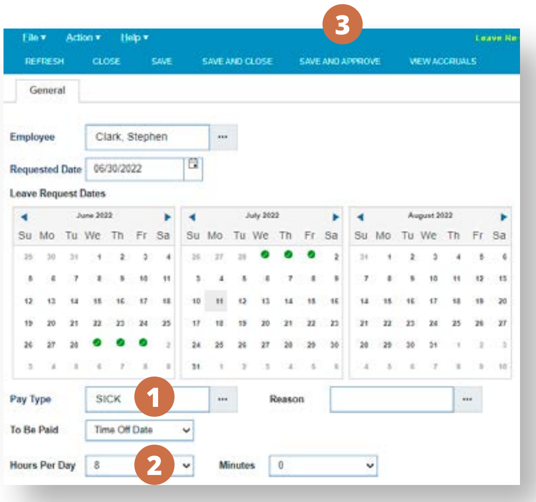
In the example below, the employee took a full sick day instead of a partial vacation day.

1. **Pay Type** was changed from **VACATION** to **SICK**.
2. **Hours Per Day** was changed from 4 to 8.
3. Click **SAVE AND APPROVE** or **SAVE AND CLOSE**. If the latter, the request will remain in pending status until approved.

Original:

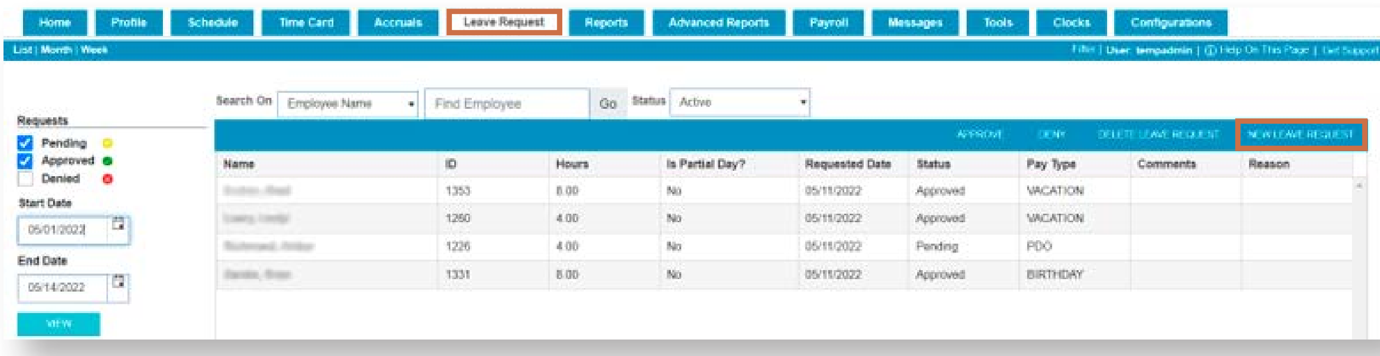


Updated:



Create Leave Requests

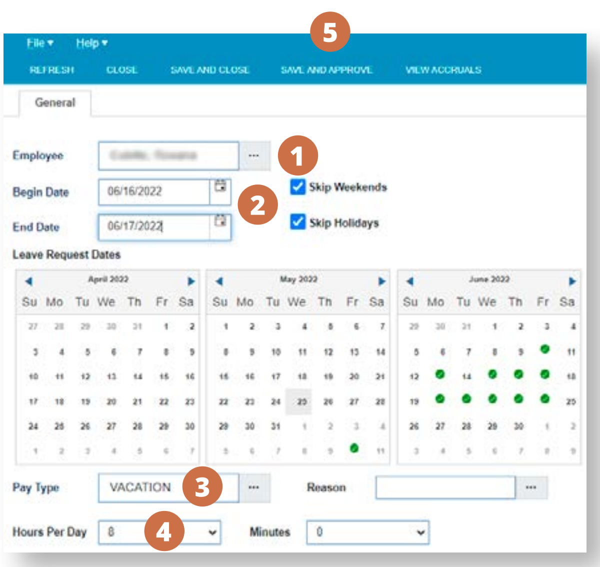
At times, supervisors and administrators may need to create leave requests on behalf of the employees. From the **Leave Request** tab, click on **NEW LEAVE REQUEST**.



The **Leave Request** box will appear.

1. Select the employee.
2. Select **Begin Date** and **End Date**. If applicable, check or uncheck **Skip Weekends** and **Skip Holidays**.
3. Select **Pay Type**.
4. Select **Hours Per Day** and, if applicable, the **Minutes** (15-minute increments).
5. Select **SAVE AND APPROVE** (or **SAVE AND CLOSE** if you do not wish to approve the request now).

Note: When a leave request is created, an automated email is sent to the employee and their direct supervisor.



Once a request is approved, verify that the request transferred to the time card (pg. 18).

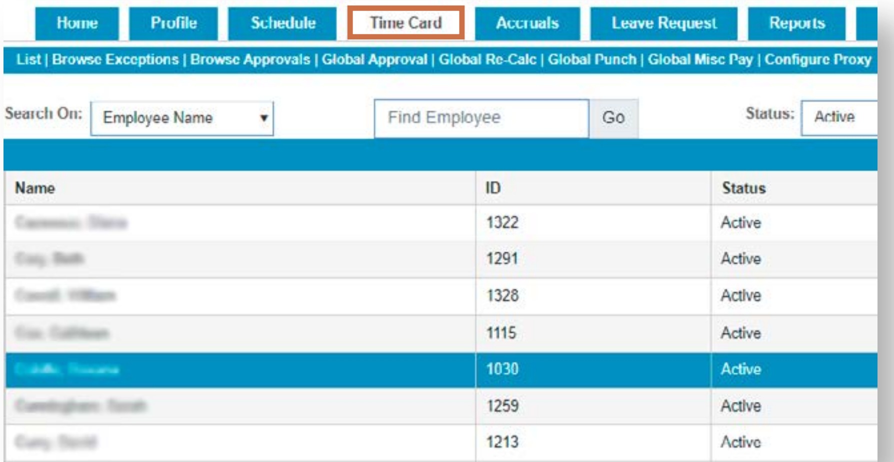
Note: Any leave requests submitted or approved on the day of, or for days prior to the requested day, will not transfer automatically to the time card. The time card must be saved again.

Time Card Validation

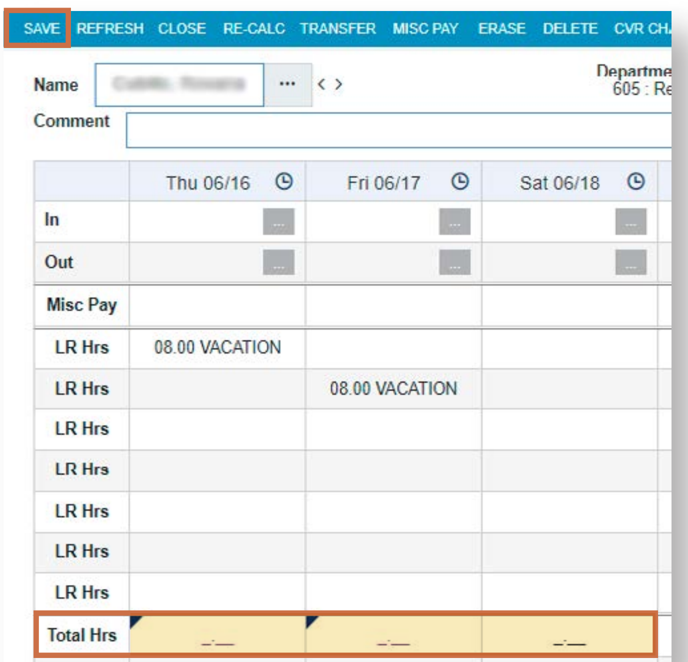
Once a leave request is approved, the time card must be verified to ensure that the request transferred.

> **Note: Any Leave Requests submitted or approved on the day of, or for days prior to the requested day, will not transfer automatically to the time card. The time card must be saved again.**

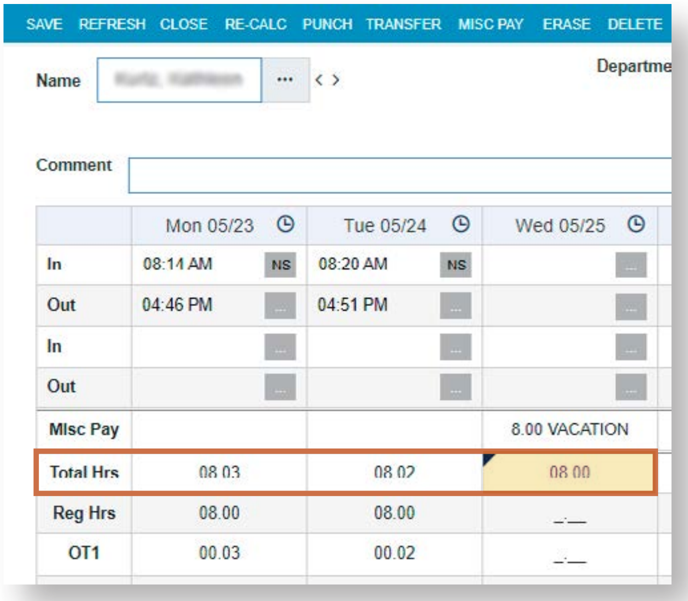
From the **Time Card** tab, double-click on the employee for whom the leave request was just approved.



If the leave hours are not populated in the **Total Hrs** row, click on **SAVE** to update the time card.



After the time card has been saved, the leave request hours will populate in the **Total Hrs** row.



When all pending leave requests have been resolved and all corresponding time cards have been validated, navigate back to the **Home** tab.

Time Card Approvals (Home – Dashboard)

Checklist

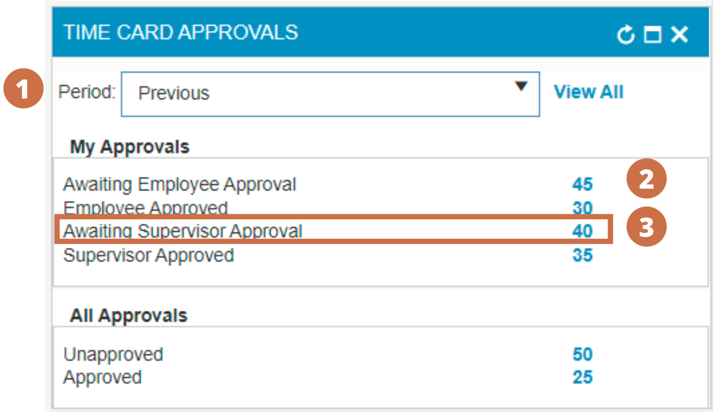
- Missing punches and other time card exceptions have been resolved.
- Leave requests have been approved or denied.
- Time cards have been updated to include all approved leave requests.

Time Card Approvals

1. **Period** – select the time frame that you want to review.
2. **Awaiting Employee Approval** (optional) – this is for accountability purposes only and is not required to process payroll. If required, employee approvals must be done prior to supervisor approvals.
3. **Awaiting Supervisor Approval** – click on the blue number to approve time cards.

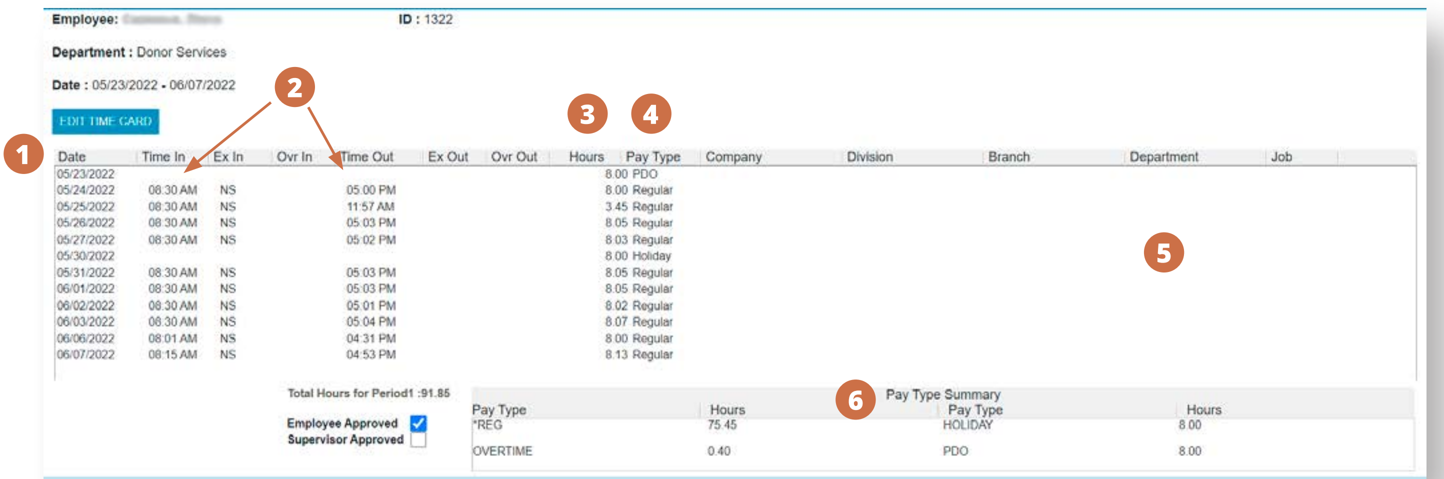
   Note:

   - Once a time card is approved by a supervisor, it is locked.
   - Edits cannot be made and employees cannot punch in or out unless the time card is un-approved.
   - Because of this, **supervisors should not approve time cards until the employee has punched out on the last day of the pay period**.



A time card summary will be displayed for each employee, 10 summaries per page. Review the following:

1. Dates worked.
2. **Time in** and **Time out**.
3. Total hours worked.
4. **Pay Type** (regular, holiday, vacation, sick, etc).
5. Department transfers (if applicable).
6. **Pay Type Summary** information.



Employee: ID : 1322

Department : Donor Services

Date : 05/23/2022 - 06/07/2022

EDIT TIME CARD

Date	Time In	Ex In	Ovr In	Time Out	Ex Out	Ovr Out	Hours	Pay Type	Company	Division	Branch	Department	Job
05/23/2022							8.00	PDO					
05/24/2022	08:30 AM	NS		05:00 PM			8.00	Regular					
05/25/2022	08:30 AM	NS		11:57 AM			3.45	Regular					
05/26/2022	08:30 AM	NS		05:03 PM			8.05	Regular					
05/27/2022	08:30 AM	NS		05:02 PM			8.03	Regular					
05/30/2022							8.00	Holiday					
05/31/2022	08:30 AM	NS		05:03 PM			8.05	Regular					
06/01/2022	08:30 AM	NS		05:03 PM			8.05	Regular					
06/02/2022	08:30 AM	NS		05:01 PM			8.02	Regular					
06/03/2022	08:30 AM	NS		05:04 PM			8.07	Regular					
06/06/2022	08:01 AM	NS		04:31 PM			8.00	Regular					
06/07/2022	08:15 AM	NS		04:53 PM			8.13	Regular					

Total Hours for Period1 :91.85

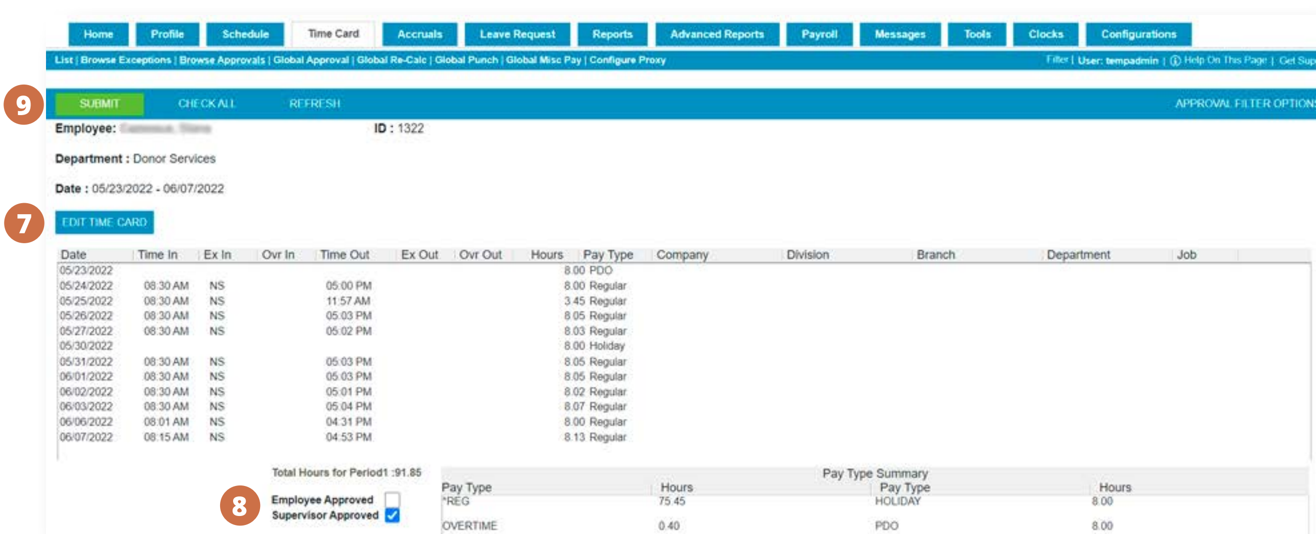
Employee Approved
Supervisor Approved

Pay Type Summary

Pay Type	Hours	Pay Type	Hours
*REG	75.45	HOLIDAY	8.00
OVERTIME	0.40	PDO	8.00

7. If information needs to be updated, click on **EDIT TIME CARD**. Make any needed adjustments. After clicking Save, it will return to the time card summaries for continuation of the approval process.
8. Once all information is accurate, check the box next to **Supervisor Approved**.
9. Click **Submit**.

Note: The Check All function is not recommended as detail accuracy may be overlooked.



Employee: ID : 1322

Department : Donor Services

Date : 05/23/2022 - 06/07/2022

EDIT TIME CARD

Date	Time In	Ex In	Ovr In	Time Out	Ex Out	Ovr Out	Hours	Pay Type	Company	Division	Branch	Department	Job
05/23/2022							8.00	PDO					
05/24/2022	08:30 AM	NS		05:00 PM			8.00	Regular					
05/25/2022	08:30 AM	NS		11:57 AM			3.45	Regular					
05/26/2022	08:30 AM	NS		05:03 PM			8.05	Regular					
05/27/2022	08:30 AM	NS		05:02 PM			8.03	Regular					
05/30/2022							8.00	Holiday					
05/31/2022	08:30 AM	NS		05:03 PM			8.05	Regular					
06/01/2022	08:30 AM	NS		05:03 PM			8.05	Regular					
06/02/2022	08:30 AM	NS		05:01 PM			8.02	Regular					
06/03/2022	08:30 AM	NS		05:04 PM			8.07	Regular					
06/06/2022	08:01 AM	NS		04:31 PM			8.00	Regular					
06/07/2022	08:15 AM	NS		04:53 PM			8.13	Regular					

Total Hours for Period1 :91.85

Employee Approved
Supervisor Approved

Pay Type Summary

Pay Type	Hours	Pay Type	Hours
*REG	75.45	HOLIDAY	8.00
OVERTIME	0.40	PDO	8.00

To advance to the next set of 10 employees, scroll to the bottom of the screen and click on the arrows in the bottom-right corner.

When all time cards have been approved, the payroll is ready to be processed.

For payroll processing instructions, access *Section 2 – Online Payroll Processing* of the *Evolution Training Manual*.

HCM clients, click here to access the HCM manual.

Note:

Payroll Export File will be needed for the following situations. If this is required, specific instructions will be provided.

- Two groups, different pay periods, same check date.
  - Hourly paid on 15th for work completed from 23rd – 7th; salary also paid on the 15th for work from 1st – 15th.
- Employees who have multiple pay rates tied to multiple departments.
  - $15 for work done in the Admin department; $13 for work done in the Janitorial department.

Common Time Card Edits

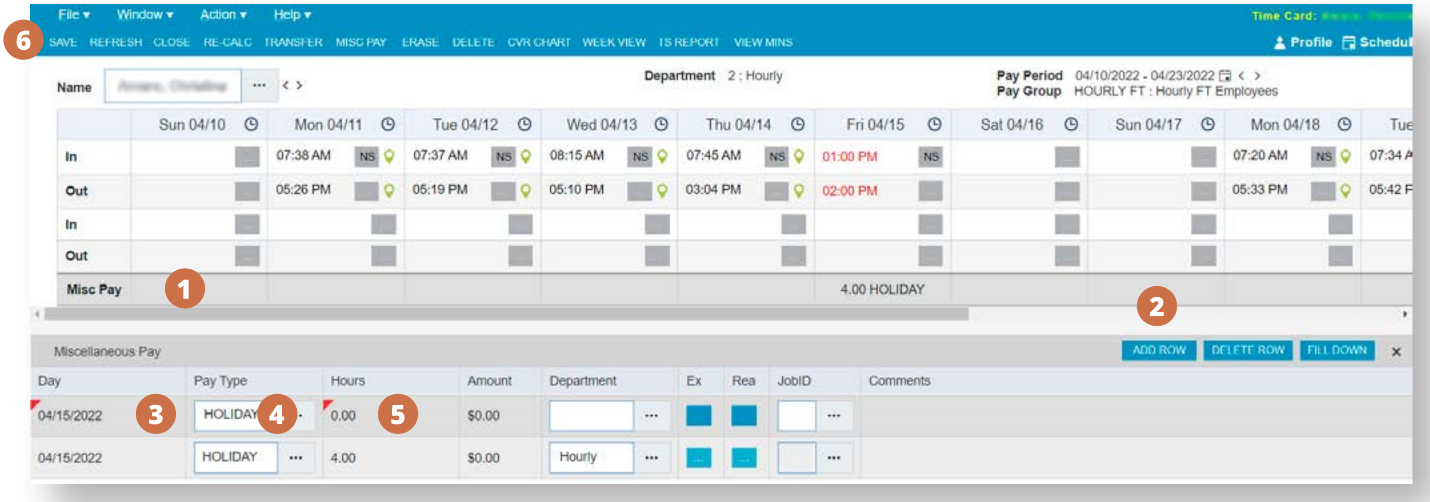
Holidays

Adjusting/Removing Pre-Populated Holiday Hours

Holiday hours are not visible on the time cards until the actual date of the holiday.

Occasionally, adjustments may need to be made to the number of hours awarded to an employee on their time card.

1. From the employee's time card, click on the **Misc Pay** line. The **Miscellaneous Pay** information will open below.
2. Click **ADD ROW** – a new line will appear at the top of the **Miscellaneous Pay** grid.
3. Under **Day** – change the date in the new line to match the date in the original holiday pay line.
4. Under **Pay Type** – click the three dots; choose **Holiday**.
5. Under **Hours** – enter the correct number of holiday hours. In this example, "0" was entered to remove the holiday pay completely.
6. Click **SAVE** – the original holiday pay line will disappear and be replaced with the new line.



Holiday hours are pre-populated on time cards for applicable employees. This is driven by the employee's assigned Pay Group.

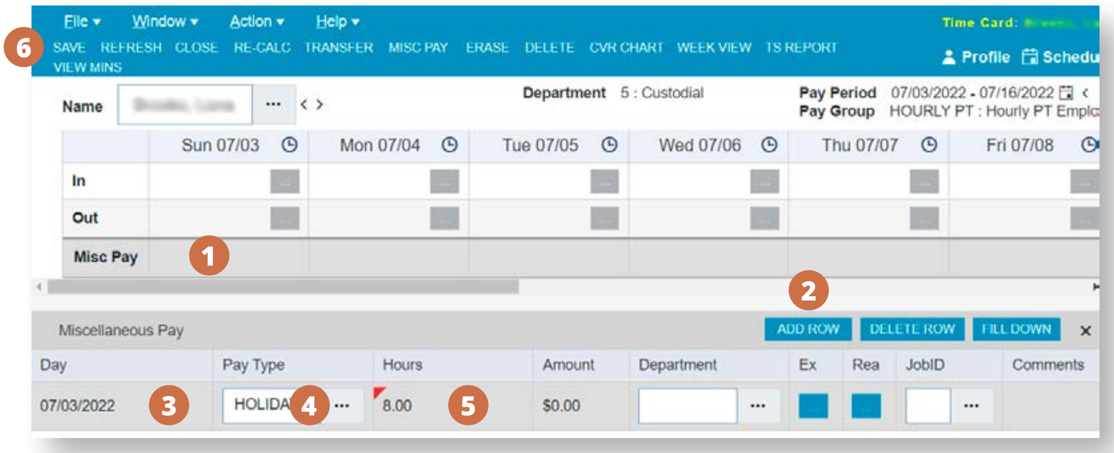
- If an employee's time card does not have pre-populated holiday hours – but should, contact your payroll processor.
- If several employees need to have holiday hours adjusted on a consistent basis, contact your payroll processor.

Missing Holiday Hours

Holiday hours are not visible on the time cards until the actual date of the holiday.

If an employee should receive holiday pay but it is not populated on the time card:

1. From the employee's time card, click on the **Misc Pay** line. The **Miscellaneous Pay** information will open below.
2. Click **ADD ROW** – a new line will appear at the top of the **Miscellaneous Pay** grid.
3. Under **Day** – add the date of the holiday that needs to be added.
4. Under **Pay Type** – click the three dots; choose **HOLIDAY**.
5. Under **Hours** – enter the number of holiday hours.
6. Click **SAVE**.



Holiday hours are pre-populated on time cards for applicable employees. This is driven by the employee's assigned Pay Group.

- If an employee's time card does not have pre-populated holiday hours – but should, a new Pay Group may be needed.
- If several employees need to have hours adjusted on a consistent basis, a new Pay Group may also be needed.

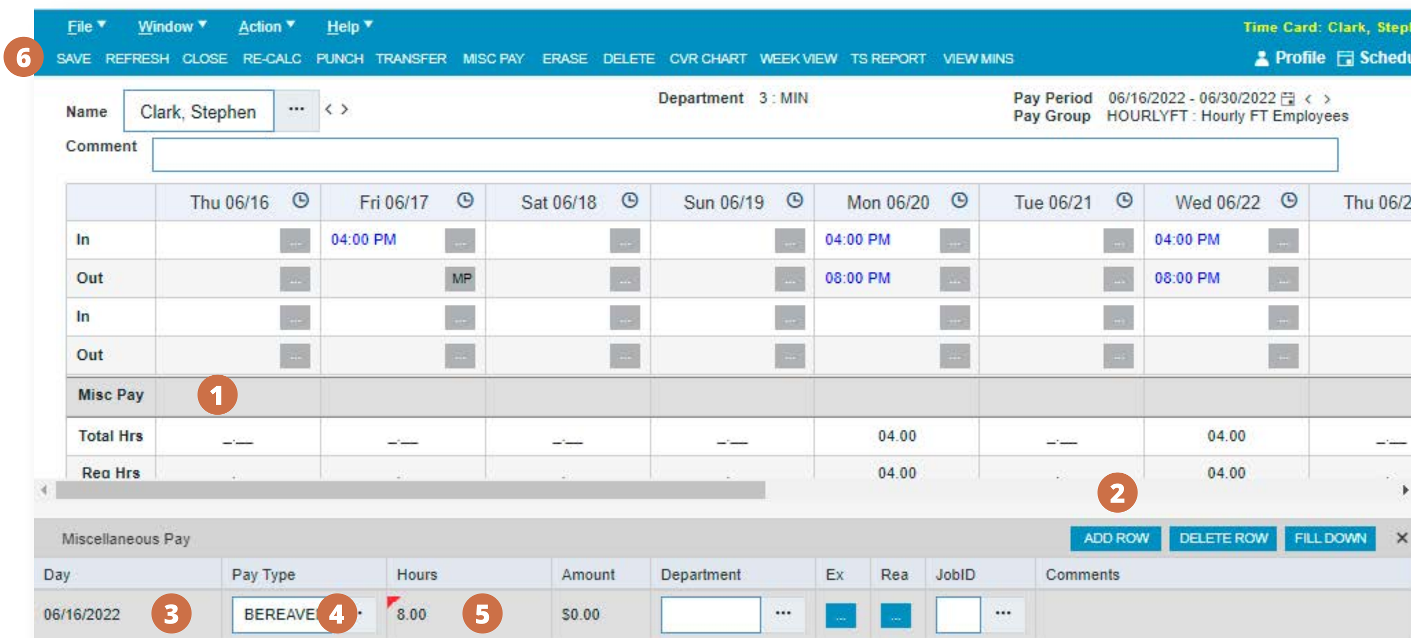
Contact your payroll processor to have additional Pay Groups added.

Miscellaneous Pay

Adding Miscellaneous Pay to a Time Card

Miscellaneous pay adjustments may need to be added to time cards for certain instances, such as bereavement or jury duty.

1. From the employee's time card, click on the **Misc Pay** line. The **Miscellaneous Pay** information will open below.
2. Click **ADD ROW** – a new line will appear at the top of the **Miscellaneous Pay** grid.
3. Under **Day** – change the date to the correct date (it will default to the first day of the pay period).
4. Under **Pay Type** – click the three dots; choose the applicable pay type (**BEREAVEMENT**, **JURY DUTY**, or **UNPAID**).
    - This method should not be used for PTO, vacation, or sick time. The preferred method for recording these types of leave hours is via the **Leave Request** tab.
5. Under **Hours** – enter the correct number of hours.
6. Click **SAVE**. The hours will populate in the **Misc Pay** line for the applicable day.



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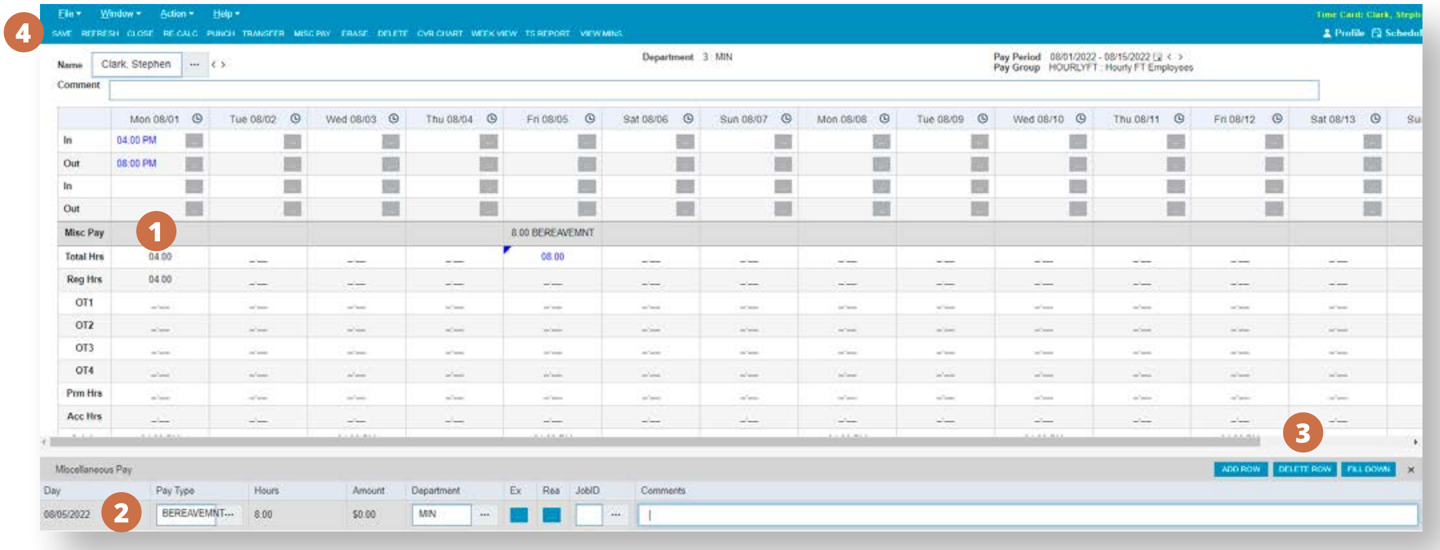
Deleting Miscellaneous Pay from a Time Card

If miscellaneous hours need to be removed after they have been manually added:

1. From the employee's time card, click on the **Misc Pay** line. The **Miscellaneous Pay** information will open below.
2. Click on the **miscellaneous pay** row that needs to be removed.
3. Click **DELETE** Row.
4. Click **SAVE**. The miscellaneous hours will be removed from the time card.



Leave Requests

Leave Request Hours are Missing on a Time Card

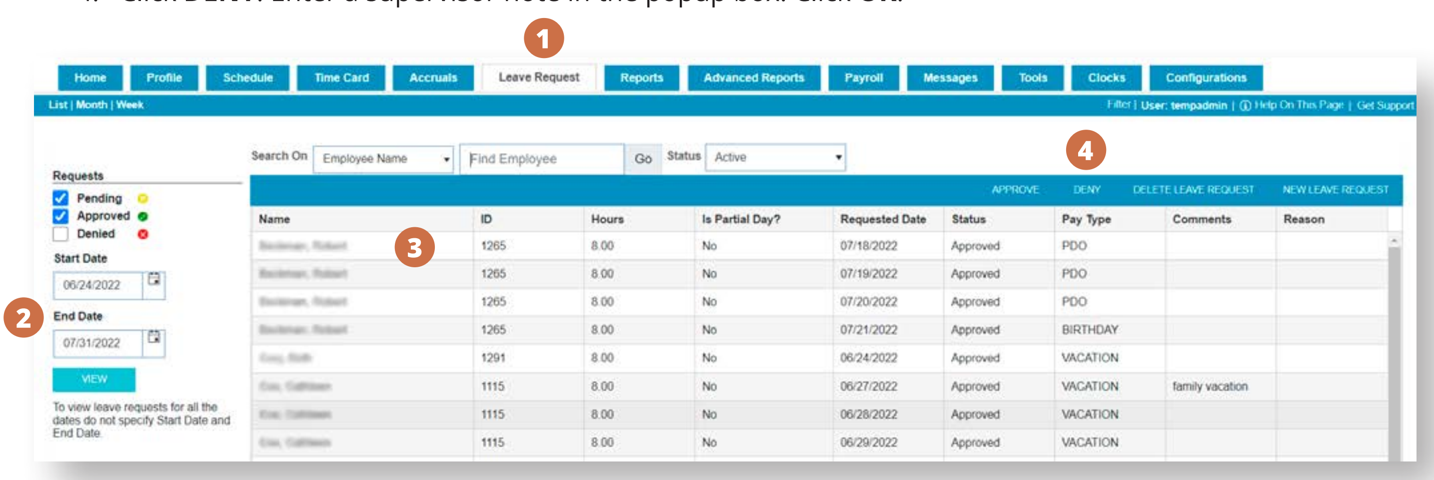
If leave request hours are not shown on the employee's time card, one of the following scenarios has happened:

- A leave request was either not created or not approved.
- Go to the **Leave Request** tab and look for the request.
- If a request **does not** exist for the date in question:
  - Click here for instructions to create and approve the request.
  - Click here to validate the time card.
- If a request **does** exist for the date in question, verify that it was approved.
  - Click here for instructions to approve the request.
  - Click here to validate the time card.
- A leave request was created and approved, but the **Time Card Validation** step was not completed.
- Click here for instructions to validate the time card.

Remove Unused Leave Request Hours from Time Card

If leave request hours are shown on the employee's time card, but the time was not taken, the leave request should be deleted.

1. Click on **Leave Request** tab.
2. Edit **Start date** and **End Date** if needed.
3. Highlight the request that needs to be removed.
4. Click **DENY**. Enter a supervisor note in the popup box. Click **OK**.



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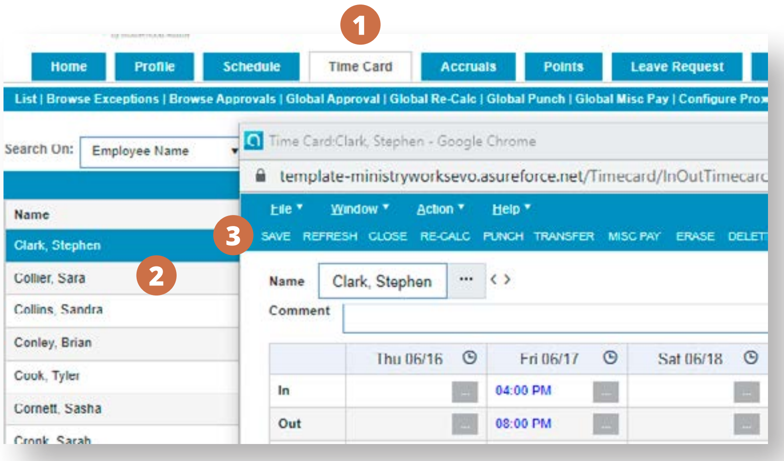
You must also verify that the time was removed from the employee's timecard

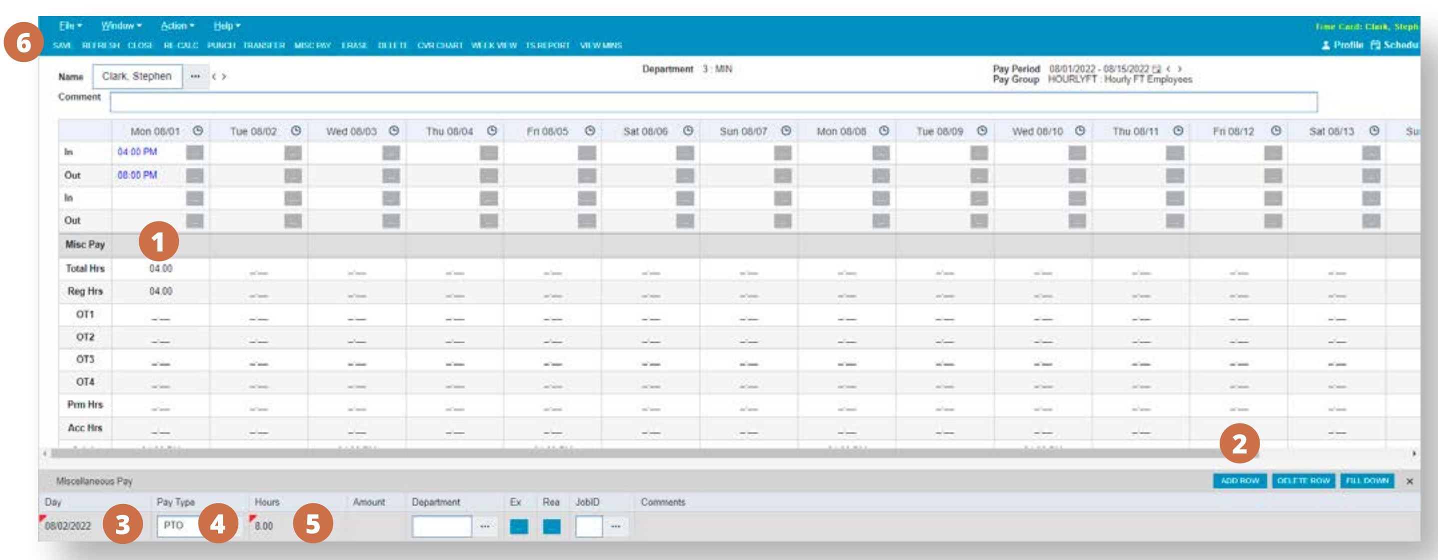
1. Click on the **Time Card** tab.
2. Double-click on the employee for whom the request was just denied.
3. Click **SAVE** on the time card to remove the hours. Verify after saving that the hours were removed.



Manually Enter Leave Requests on a Time Card

There may be times that a supervisor decides to manually enter leave hours on the time card rather than using the **Leave Request** method. This is not the preferred method for recording time. [Click here for instructions for the preferred method].

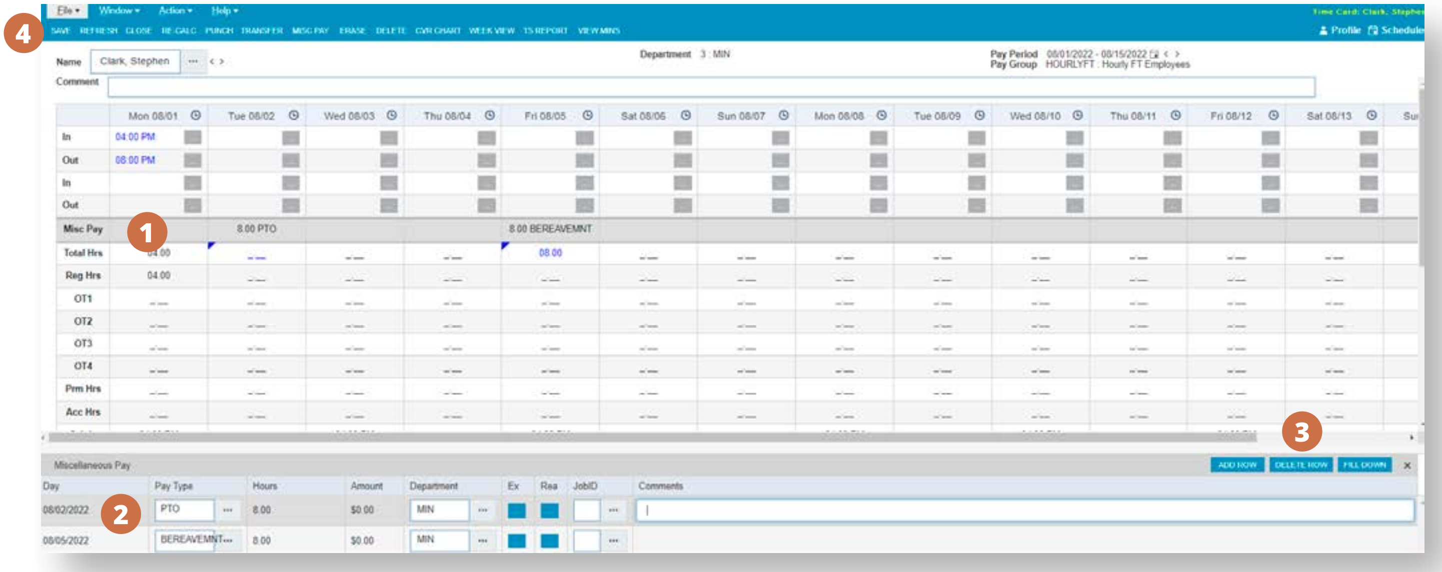
1. From the employee's time card, click on the **Misc Pay** line. The **Miscellaneous Pay** information will open below.
2. Click **ADD ROW** – a new line will appear at the top of the **Miscellaneous Pay** grid.
3. Under **Day** – change the date to the correct date (it will default to the first day of the pay period).
4. Under **Pay Type** – click the three dots; choose applicable pay type.
5. Under **Hours** – enter the correct number of hours.
6. Click **SAVE**.



Manually Delete Leave Requests from a Time Card

If leave request hours are manually added to the time card, they must also be deleted manually. They cannot be deleted from the **Leave Request** tab.

1. From the employee's time card, click on the **Misc Pay** line. The **Miscellaneous Pay** information will open below.
2. Click on the miscellaneous pay row that needs to be removed.
3. Click **DELETE ROW**.
4. Click **SAVE**. The leave request hours will be removed from the timecard.



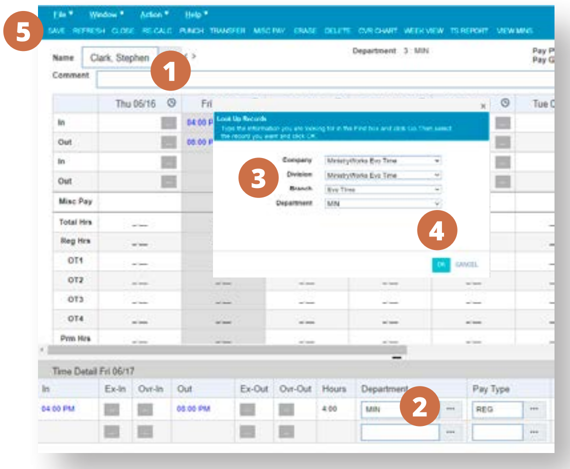
Department Assignments

Change Department Allocation

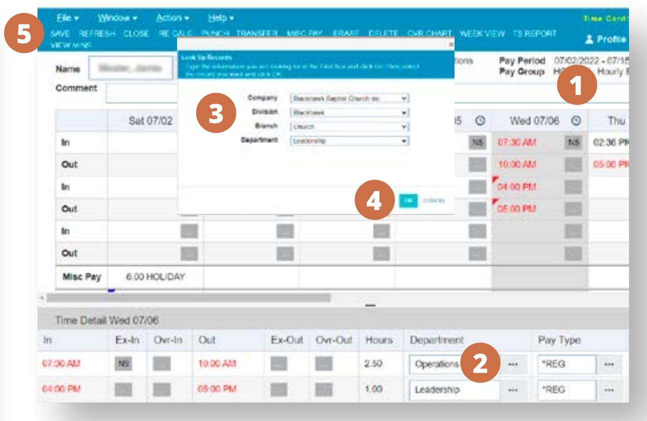
If an employee forgets to transfer departments, the hours will need to be manually allocated on the time card.

1. Click on the **clock icon** – the entire day will be highlighted in gray, and the **Time Detail** will be opened below.
2. Click on the three dots under **Department** – a popup box will display.
3. Select the applicable **Division**, **Branch** or **Department** (or **Team** if applicable).
4. Click **OK**.
5. Click **SAVE** in the time card.

Allocate ALL hours to a different dept:



Allocate a PORTION of the hours to a different dept:



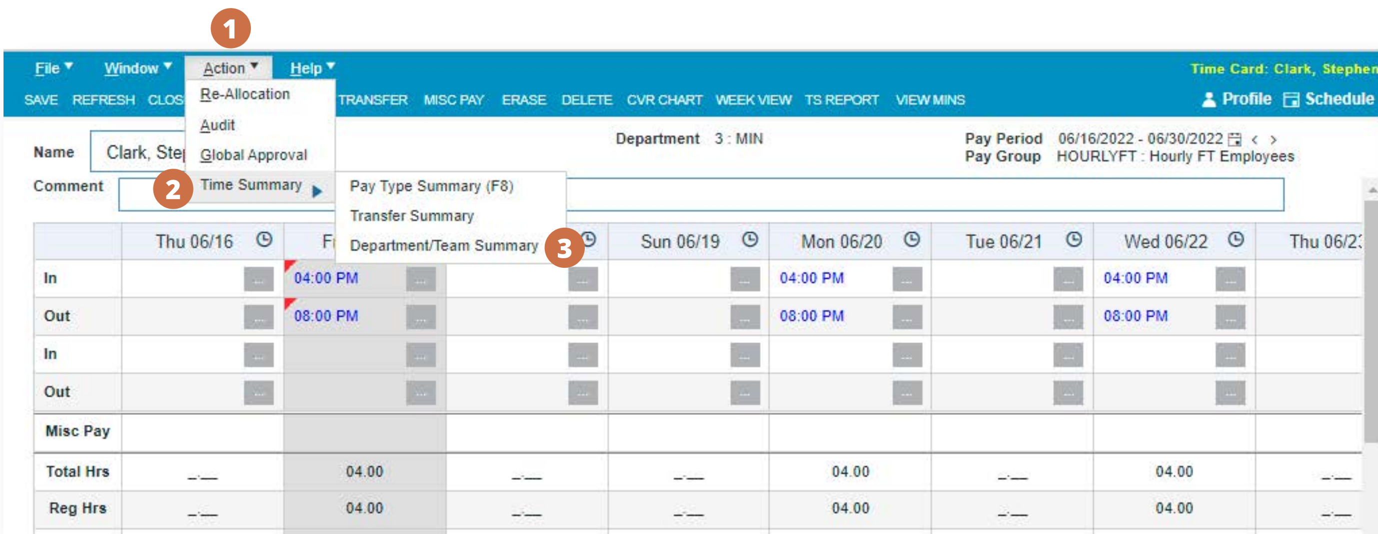
Department/Team Summary by Time Card

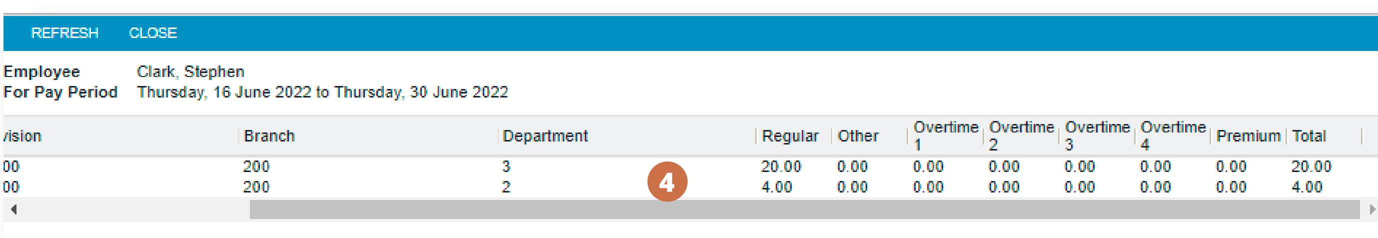
To review the total hours worked by a department/team for a specific employee:

Go to the employee's time card:

1. Click **Action**.
2. Click **Time Summary**.
3. Click **Department/Team Summary**.
4. A summary will be displayed. It totals all hours for each department.

If the totals do not seem accurate, you can make edits on the individual days.



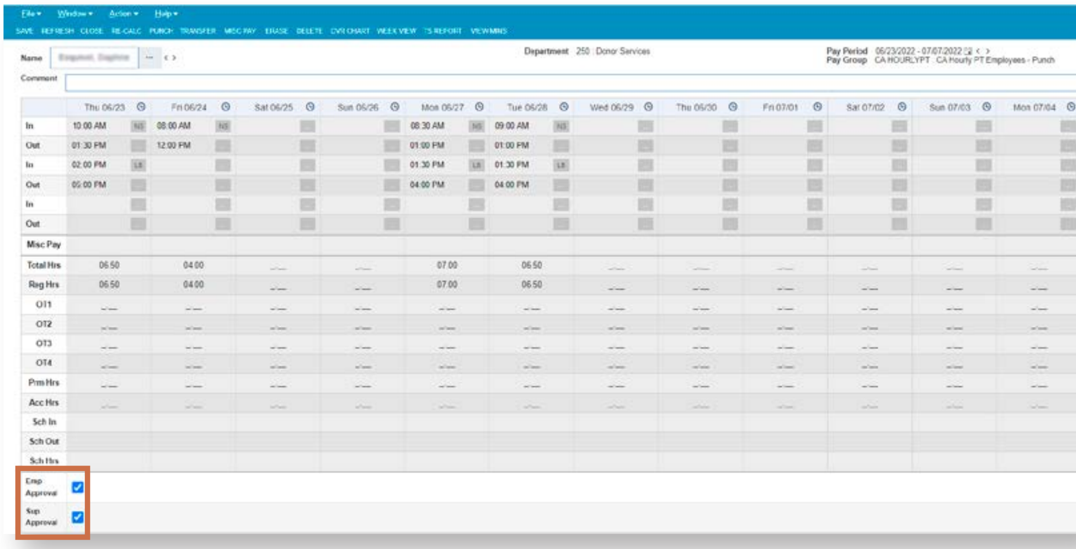


Unlock Time Card to Allow Edits

Once a time card has been approved by either the employee or by management, edits will no longer be allowed, including punches. The time card must be unlocked.

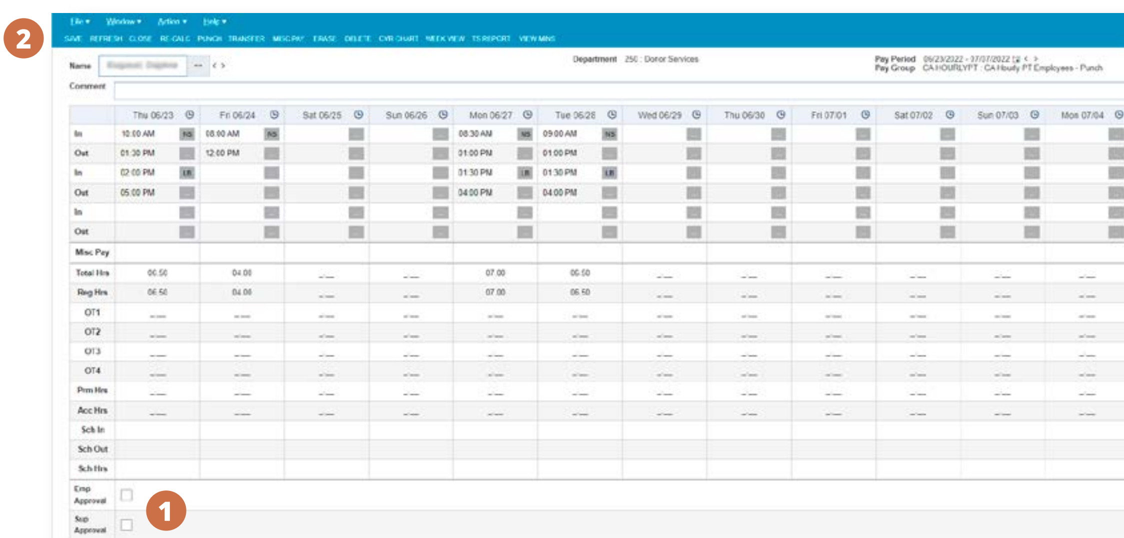
- Only administrators can unlock supervisor approvals.
- Administrators and supervisors can unlock employee approvals.

An example of a locked time card is listed below. Approval boxes are checked, and the time card is shaded, and edits cannot be made.



To Unlock:

1. Uncheck the boxes for **Emp Approval** and **Sup Approval** (as applicable).
2. Click **SAVE**. The time card is no longer shaded, and edits can be made.



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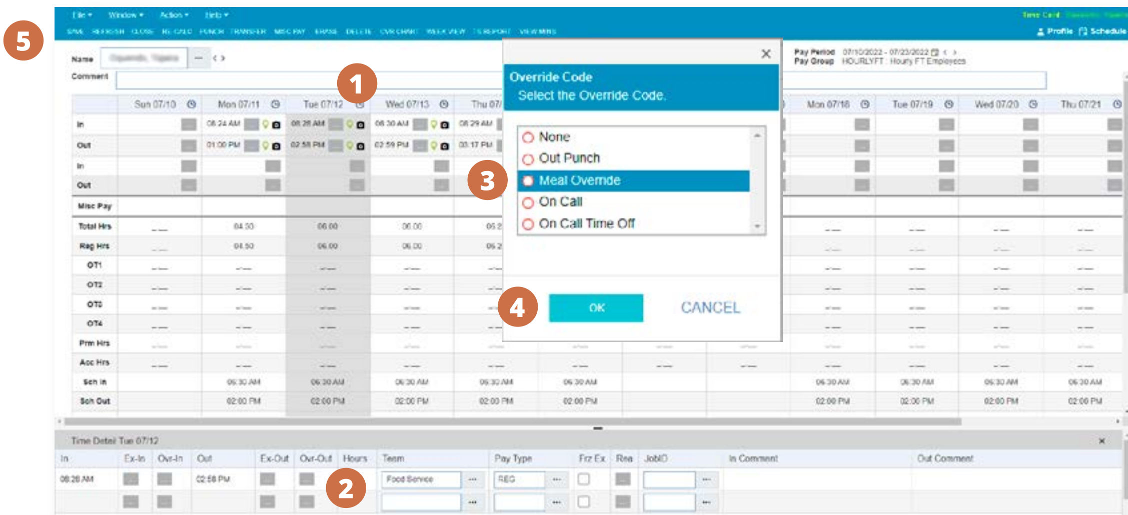
Remove Auto Lunch Deductions

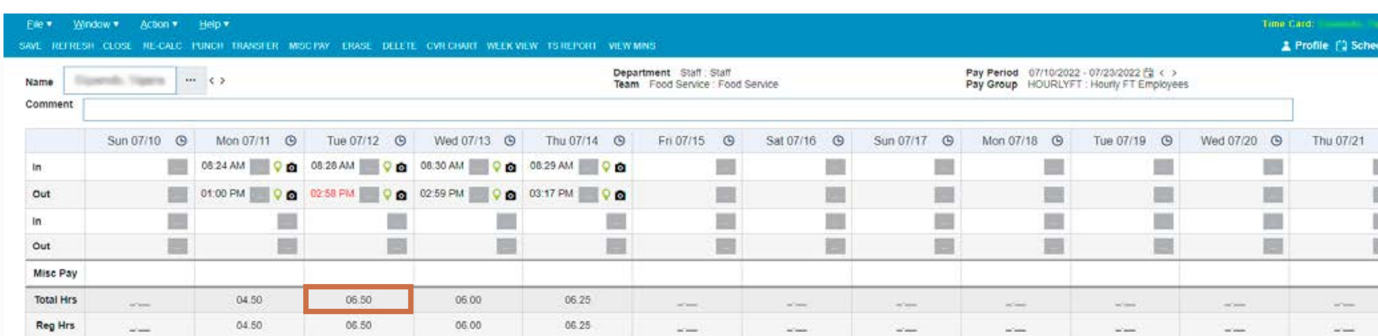
If your ministry has rules built to have lunches automatically deducted from hours worked, you may find that there will be times you need to delete this feature. Example: when an employee does not take a lunch.

From the employee's time card:

1. Click on the **clock icon** for the affected day. The entire day will be highlighted in gray and **Time Detail** will open below.
2. Click on the three dots in the **Ovr-Out** column. A popup box will display.
3. Select **Meal Override**. This will remove the auto lunch deduction.
4. Click **OK**.
5. Click **SAVE**.



In this example, the auto lunch deduction was removed and the total hours changed from 6 to 6.5 for the day.

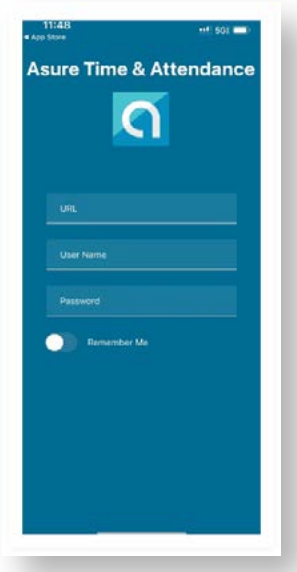


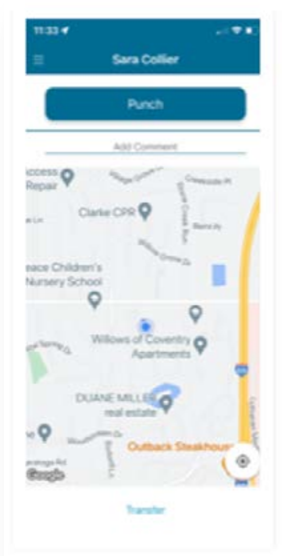
Mobile App

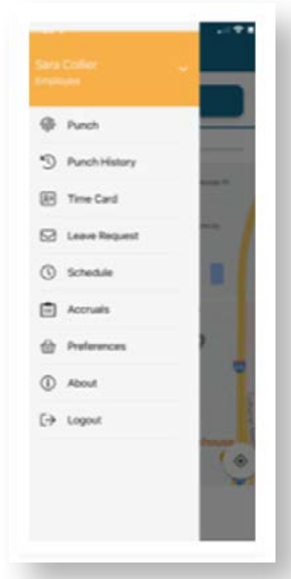
Some employers want to offer their employees the ability to punch in via the app.

Information to know:

1. The employee must initially complete the sign in process to Asure Time & Attendance by either using the ministry's assigned URL (MWxxxx.asureforce.net) or by logging in via Advanced HR (if applicable) prior to downloading the app.
2. The app only works with the "Punch" or "Hours Entry" time entry techniques. Employee using the In/Out Entry will not be able to use it.
3. Unique URL will need to be entered – https://mwXXXX.asureforce.net – XXXX will need to be replaced with your ministry's assigned #
4. In addition to recording time, the employees will also be able to see their accrual balances and create/ edit leave requests from the mobile app.
5. Employees will not be able to approve their own time card from the app. This can only be done via the URL.
6. Supervisors and administrators will not be able to approve their direct reports' time cards and leave requests via the app. This can only be done via the URL.
7. Employees will need to have the Light Mode setting turned on their phone in order to properly see the font.
    - Go to Settings, then tap Display & Brightness
    - Select Light to turn on Light Mode
8. The *Asure Time & Attendance* app can be downloaded via the Apple Store or Google Play. There are multiple Asure apps, please be sure to select to correct one. At times, due to updates, the background may change; however, the Asure will always appear.
9. The app is created to time out frequently. To avoid having to continually log in, iPhone users can set up facial recognition, while Android users can use fingerprint validation. The setting needs to be turned on within the app and within the phone system settings.







Employee Updates

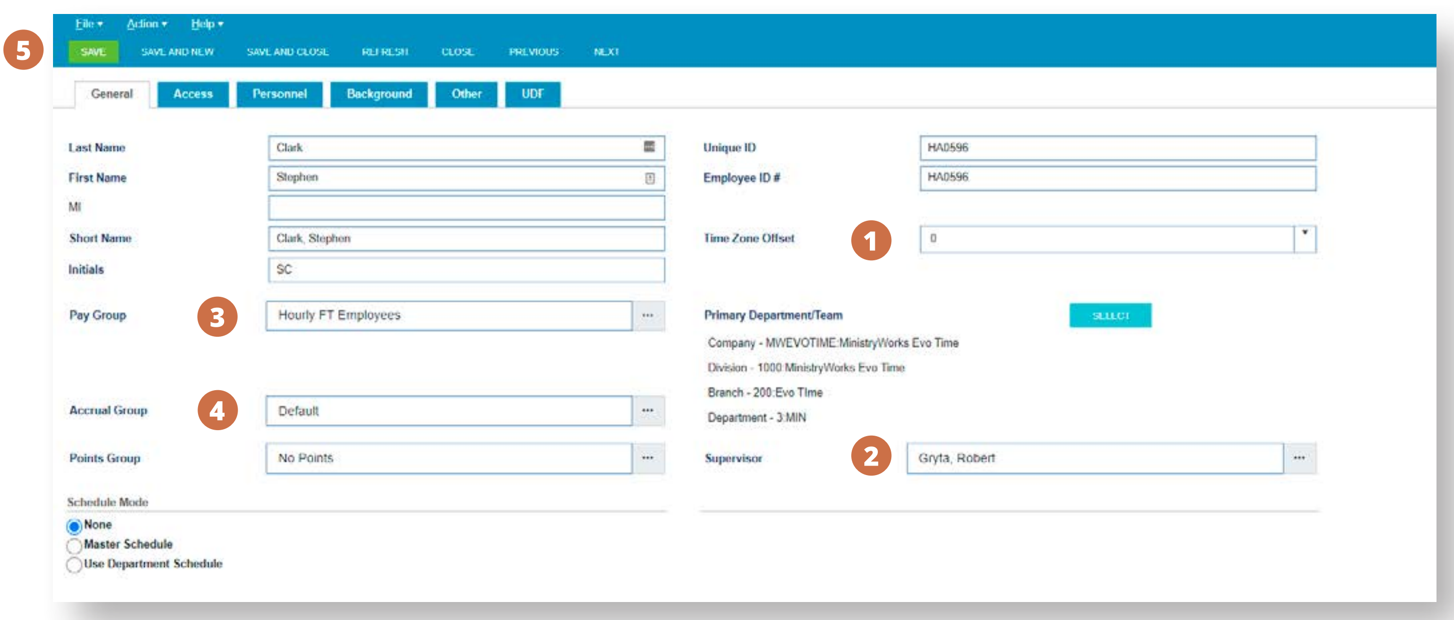
Adding New Employees

New employees are initially entered via the *Payroll* or *HCM* platform. The information then synchronizes with the *Time & Attendance* platform. A few fields that need to be updated in the *Time & Attendance* platform once the synchronization is complete.

From the **Profile tab**, double-click on the new employee.

From the **General tab**:

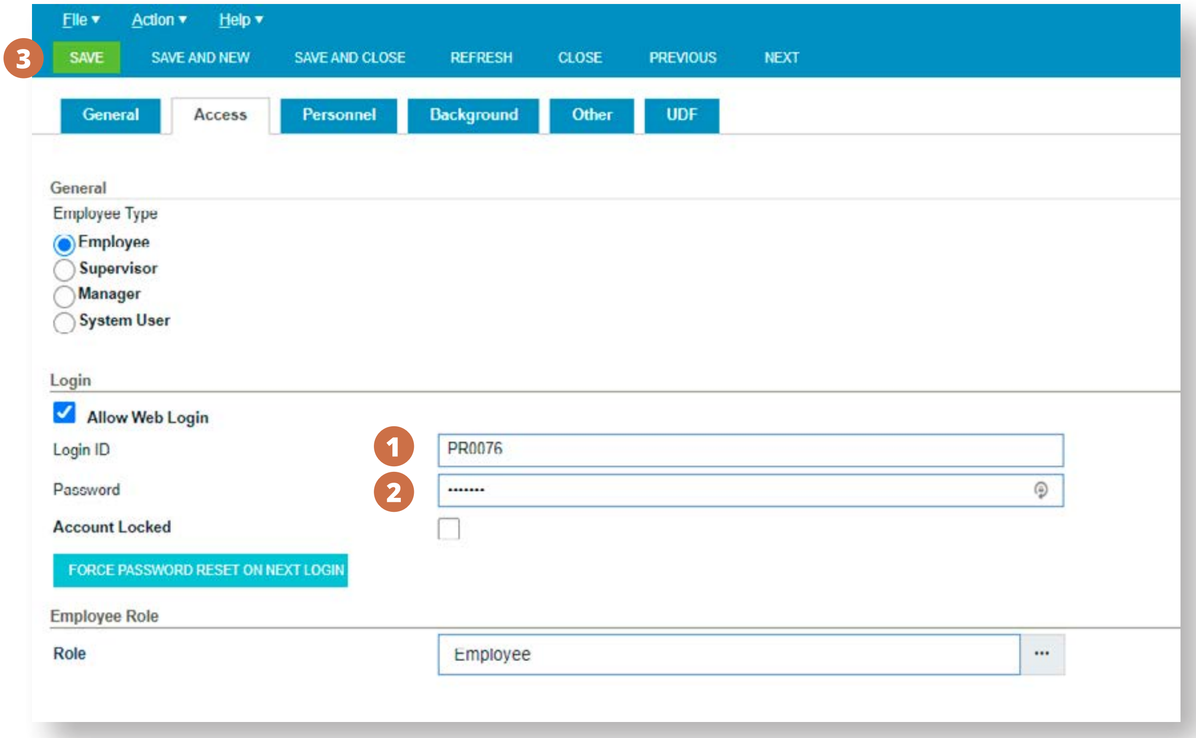
1. Select the correct **Time Zone Offset** based on where the employee works.
    a. Eastern: default
    b. Central: -1
    c. Mountain: -2
    d. Pacific: -3
2. Select the appropriate **Supervisor** by clicking on the three dots. If a supervisor is not selected, the default setting will direct all information to the administrator.
3. **Pay Group** – DO NOT EDIT THIS FIELD. This must be done via *Evolution* or the *HCM* platform; the information will then synch to the *Time & Attendance* platform.
4. Accrual Group – DO NOT EDIT THIS FIELD. This must be done via Evolution or the HCM platform; the information will then synch to the *Time & Attendance* platform.
5. Click **SAVE**.



From the **Access tab**:

1. Update the **Login ID** to the ministry's preferred format. The default is the employee number.
2. The initial **Password** is the word "default." If the employee locks themselves out, click here for instructions.

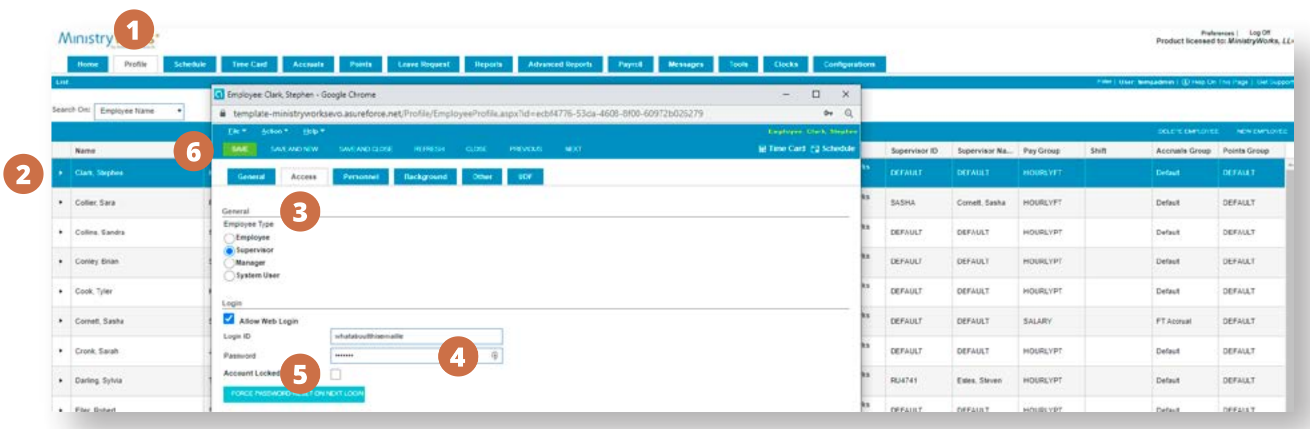
   Note: If using the mobile app, employees must log in for the first time via the website to change their password prior to logging into the mobile app.
3. Click **SAVE**.



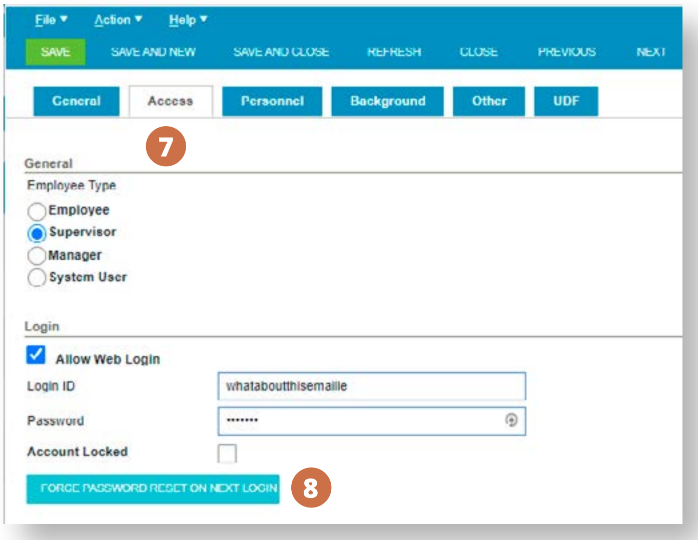
Unlock Employee – Reset Password

If the employee unsuccessfully attempts to login in three times; they will receive a notification that their account is locked. Only an administrator can change an employee profile.

1. Click on the **Profile** tab.
2. Double-click on the applicable employee.
3. From the popup, click on the **Access** tab.
4. Type a new **Password** – we suggest using the word "default."
5. Uncheck the **Account Locked** box – as a default it will be checked because the employee is locked out.
6. Click **SAVE**. You will be taken to the **General** tab.



7. Click on the **Access** tab again.
8. Click on the **FORCE PASSWORD RESET ON NEXT LOGIN** button.
9. Notify the employee of the temporary password.



Note: If the employee uses the mobile app, they will have to log into the URL first to change their password. Then they will be able to log back into the mobile app with the new password.

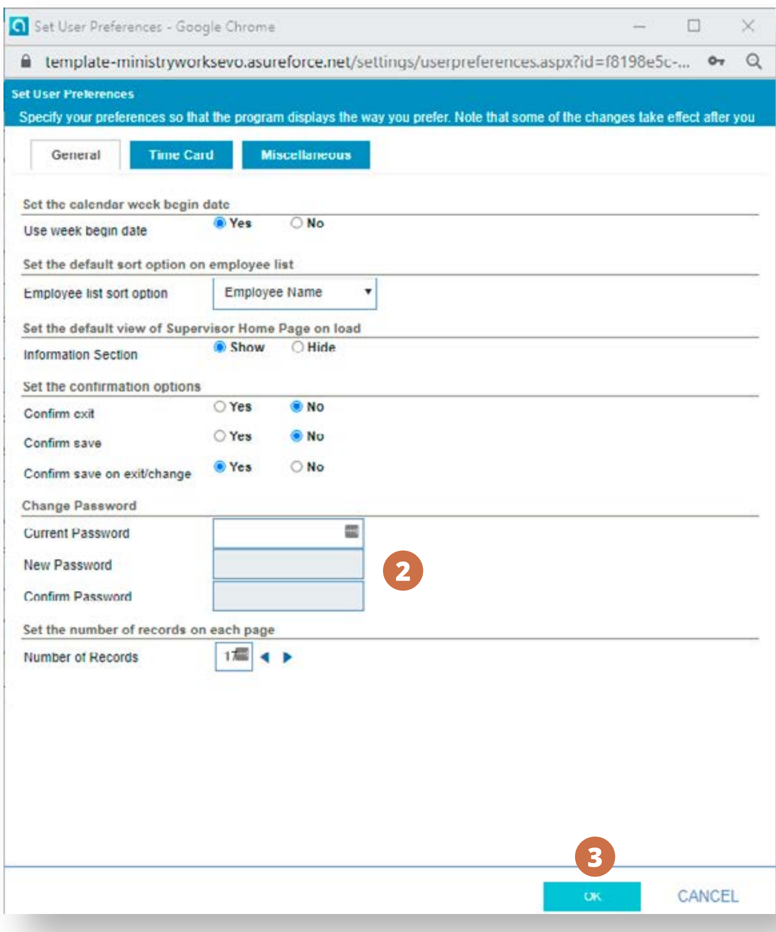
Change Password

An employee has access to change their password at any time.

1. Click **Preferences**.

A **Set User Preferences** screen will be shown.

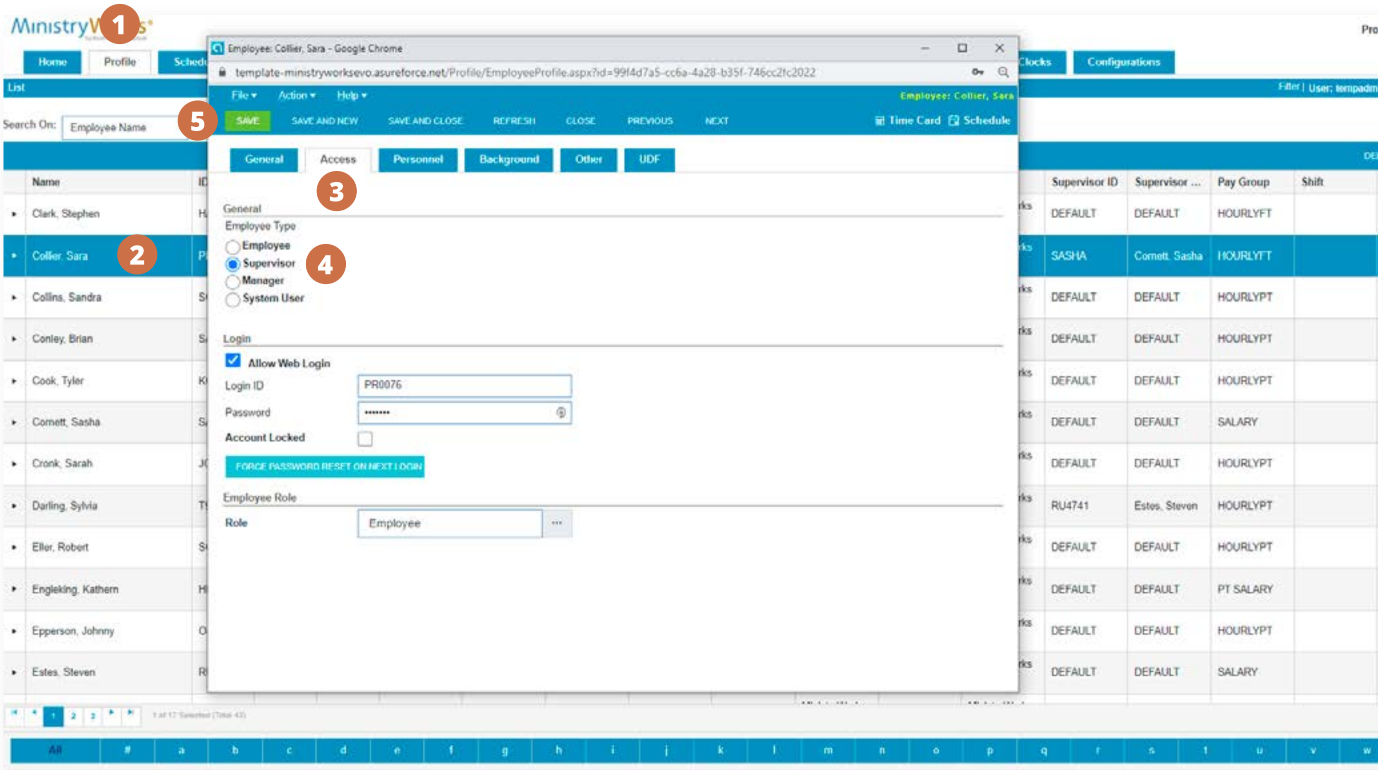
2. Complete the **Change Password** fields.
3. Click **OK**.



Supervisor Setup

If the supervisor is not an employee in *Time & Attendance*, contact your Payroll Processor.

1. Click on the **Profile** tab.
2. Double-click on the applicable employee.
3. Click on the **Access** tab.
4. Select **Supervisor** under **Employee** Type.
5. Click **SAVE**. You will be taken to the **General** tab.



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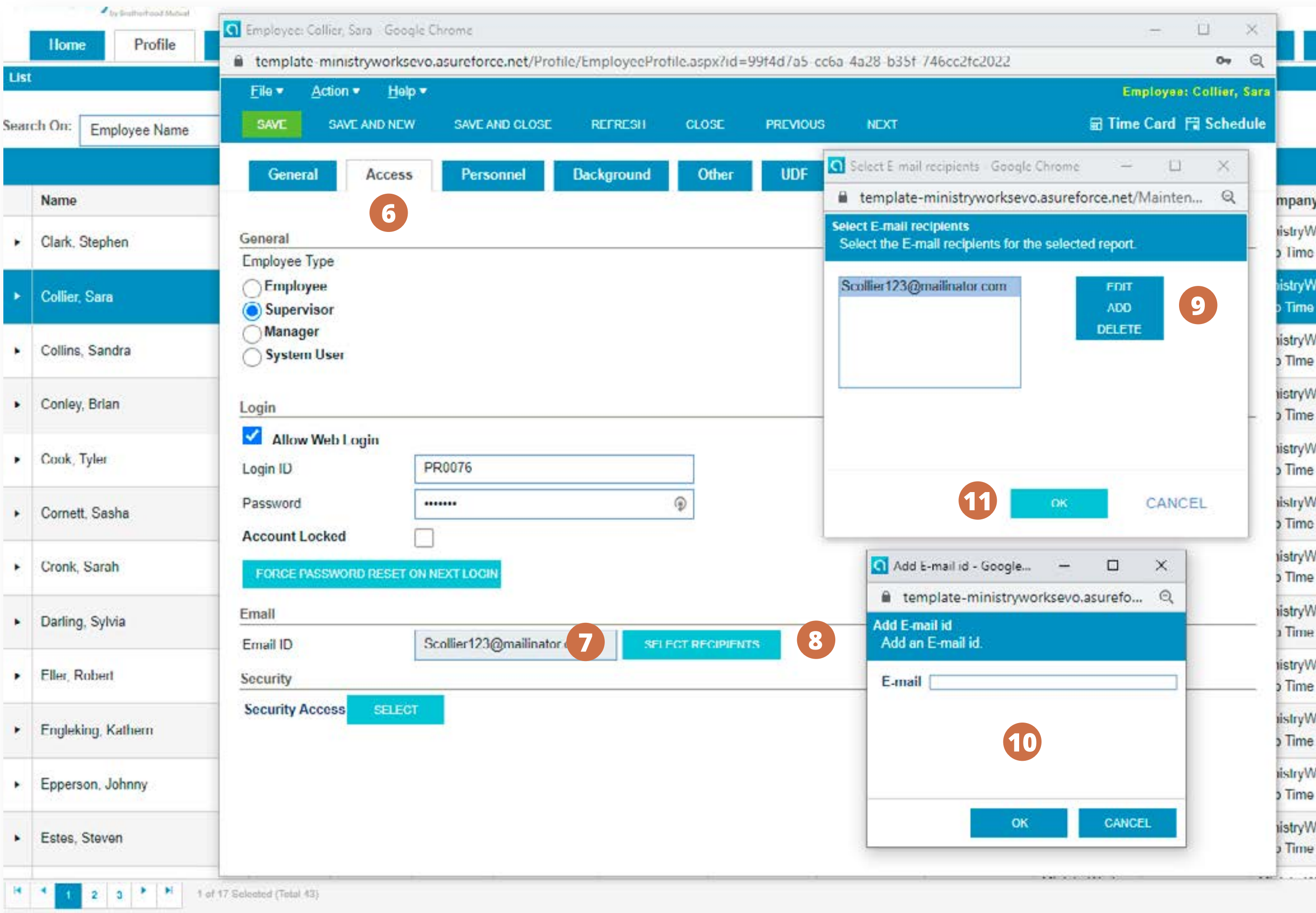
6. Click that on the **Access** tab again.
7. Verify the employee's email address populated in the **Email ID** box.
8. If it doesn't, click **SELECT RECIPIENTS**. A popup box is displayed.
9. Click **ADD**.
10. Enter email address and click **OK**.
11. Click **OK** again. You will be taken to the **Access** tab.



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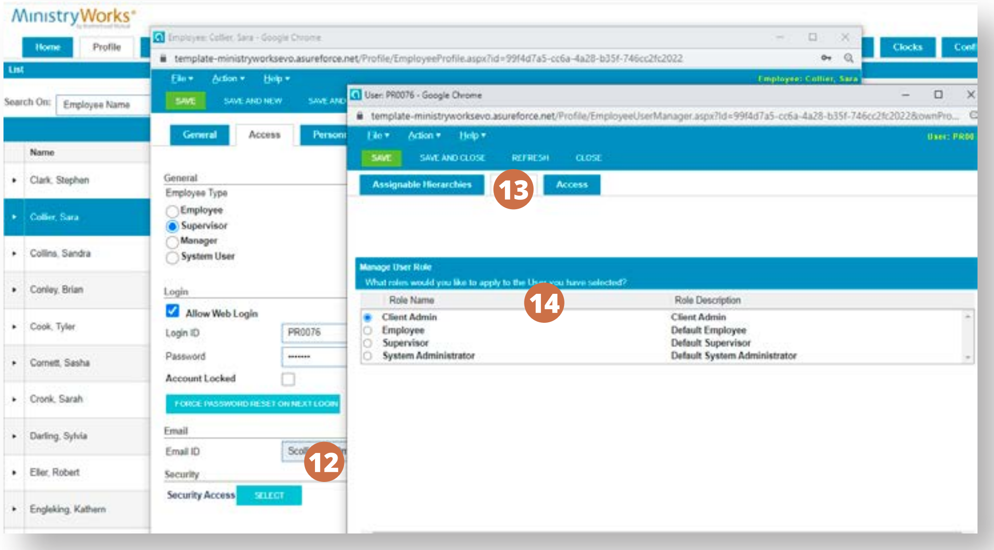
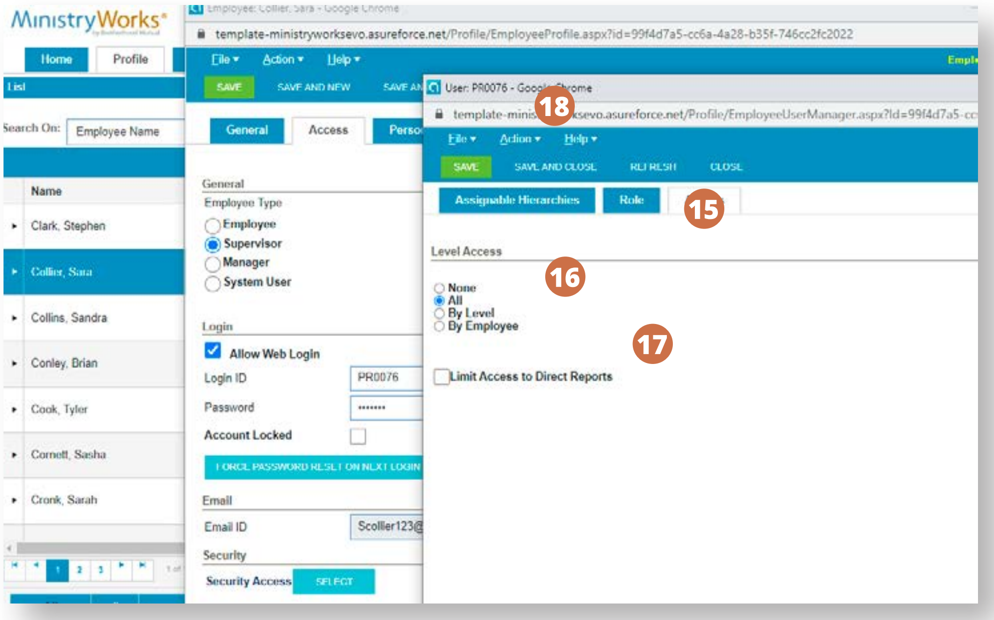
12. From the **Access** tab, click on **SELECT** next to **Security Access**. A popup box will be displayed.
13. Click on the **Role** tab.
14. If the employee should be an Administrator, select **Client Admin**; otherwise, leave as the default, **Supervisor**.



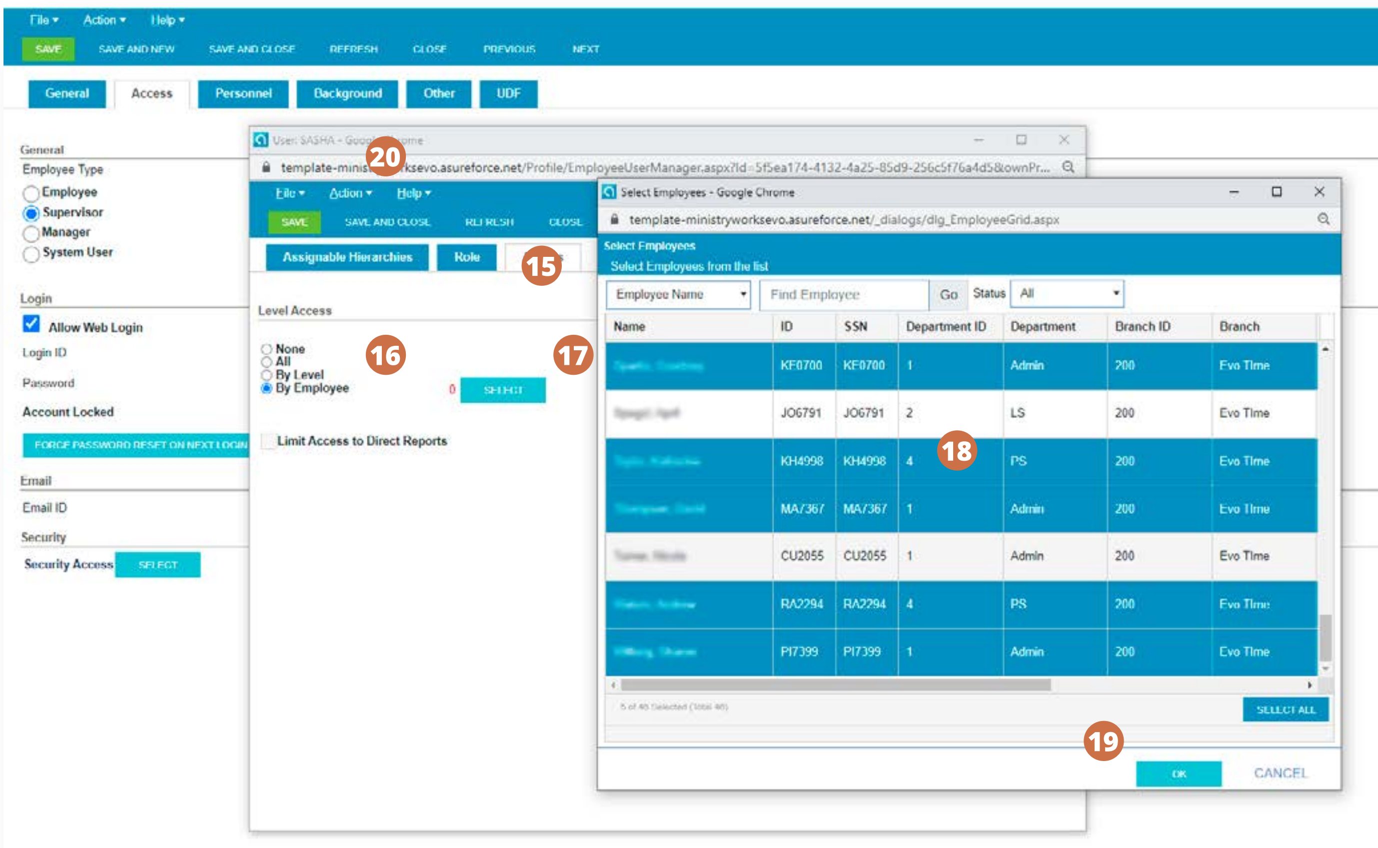
15. Click on the **Access** tab.
16. **All** will be selected as the default – DO NOT CHANGE.
17. **Limit Access to Direct Reports** – this box enables the Supervisor to only see their direct reports, as designated on the employee's **Profile** tab.
    - The box should be checked for Supervisors.
    - The box should be unchecked for Administrators.
18. Click **SAVE AND CLOSE** until you are back to the employee's **Profile** tab.



Secondary Supervisor Setup

If a second supervisor needs to be added to employees, follow all **Supervisor Setup** steps (pp. 39–41) thru #14, then continue below:

15. Click on the **Access** tab.
16. Select **By Employee**.
17. Click on the **SELECT** button.
18. To select multiple employees, use Ctrl + Click.
19. Click **OK**.
20. Click **SAVE AND CLOSE**.

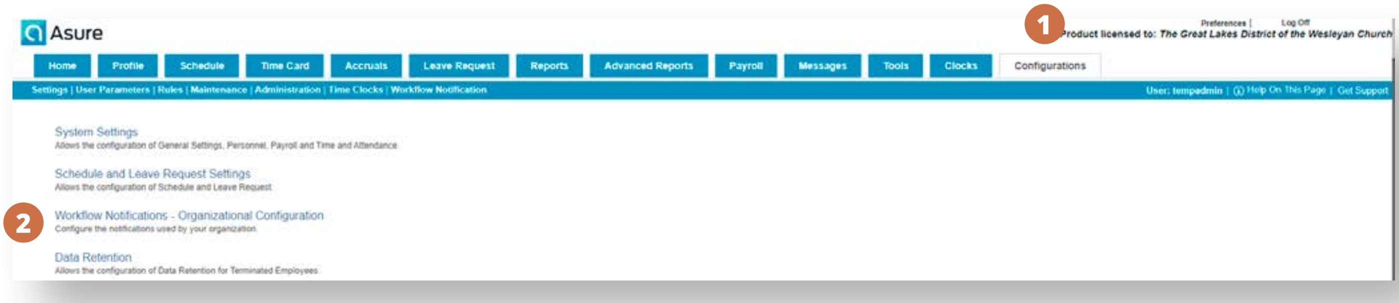


Workflow Notifications

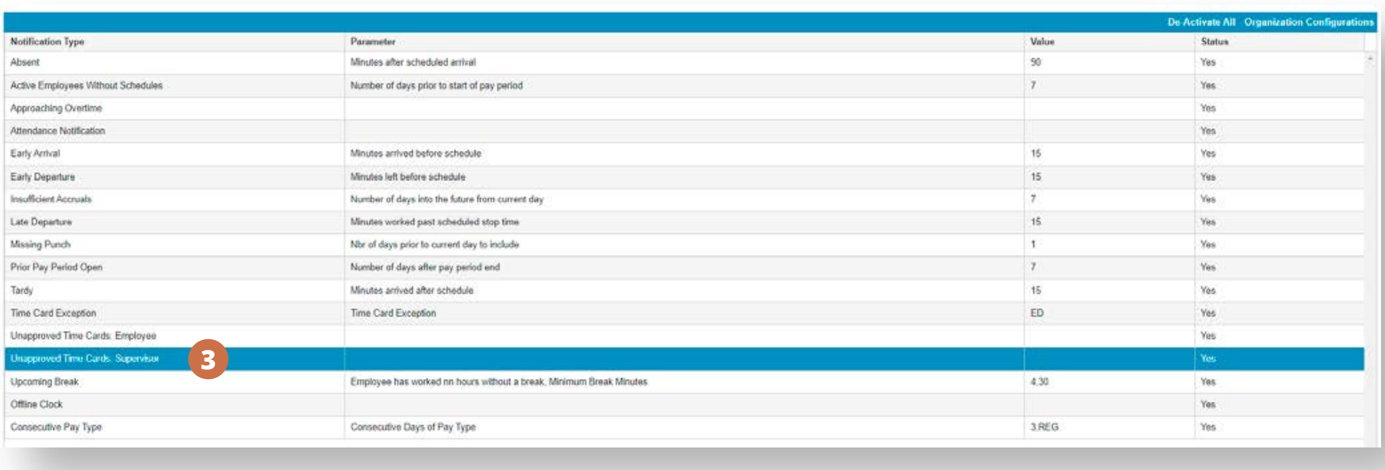
A workflow notification can be created so that supervisors and/or employees are sent automated emails reminding them to do specific tasks or prompting them with FYI info (e.g. approve time cards or a missed punch).

The initial step is to create the message that will be sent.

1. Click on the **Configurations** tab.
2. Click on **Workflow Notifications – Organizational Configuration**.

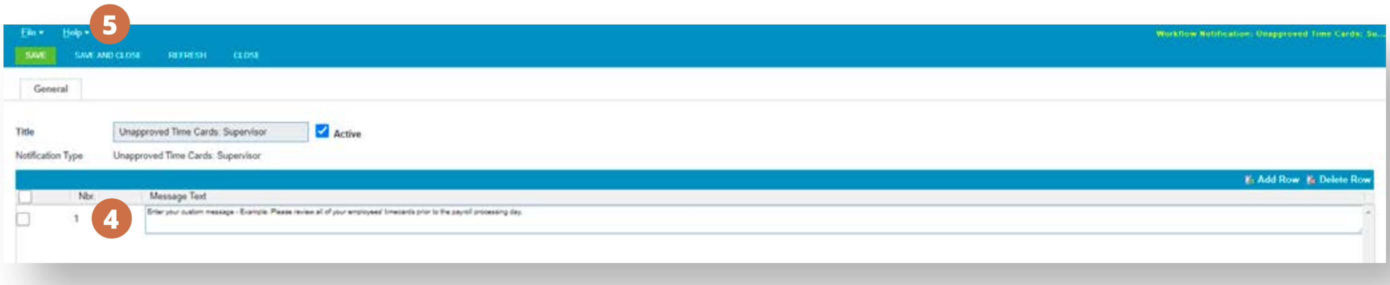


3. Double-click on the type of notification to be created.


De Activate All   Organization Configurations

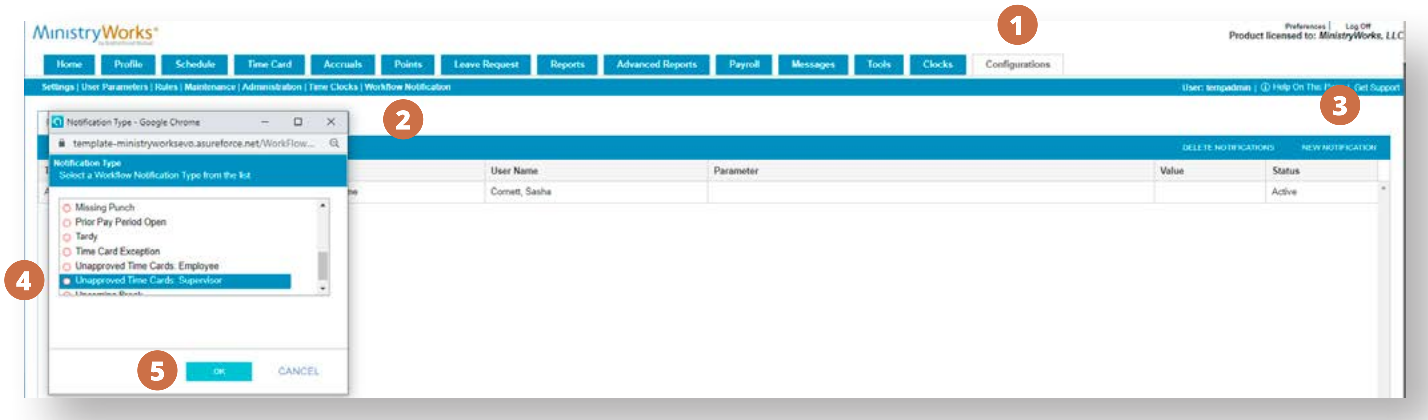
Notification Type	Parameter	Value	Status
Absent	Minutes after scheduled arrival	90	Yes
Active Employees Without Schedules	Number of days prior to start of pay period	7	Yes
Approaching Overtime			Yes
Attendance Notification			Yes
Early Arrival	Minutes arrived before schedule	15	Yes
Early Departure	Minutes left before schedule	15	Yes
Insufficient Accruals	Number of days into the future from current day	7	Yes
Late Departure	Minutes worked past scheduled stop time	15	Yes
Missing Punch	Nbr of days prior to current day to include	1	Yes
Prior Pay Period Open	Number of days after pay period end	7	Yes
Tardy	Minutes arrived after schedule	15	Yes
Time Card Exception	Time Card Exception	ED	Yes
Unapproved Time Cards: Employee			Yes
Unapproved Time Cards: Supervisor			Yes
Upcoming Break	Employee has worked nn hours without a break, Minimum Break Minutes	4,30	Yes
Offline Clock			Yes
Consecutive Pay Type	Consecutive Days of Pay Type	3,REG	Yes

4. Enter your custom message.
5. Click **SAVE AND CLOSE**.

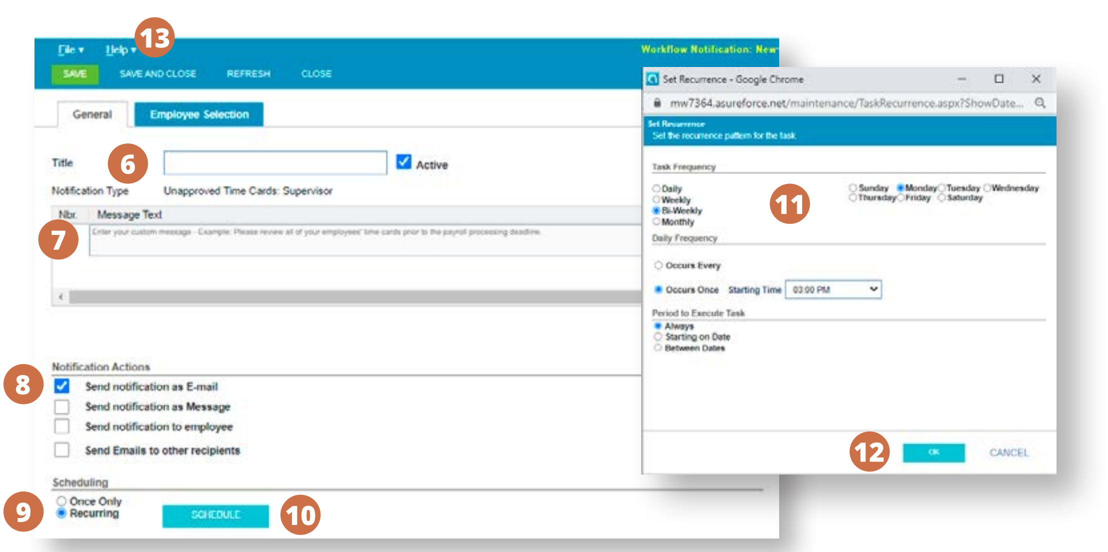


Once the message is created, the actual workflow notification needs to be created.

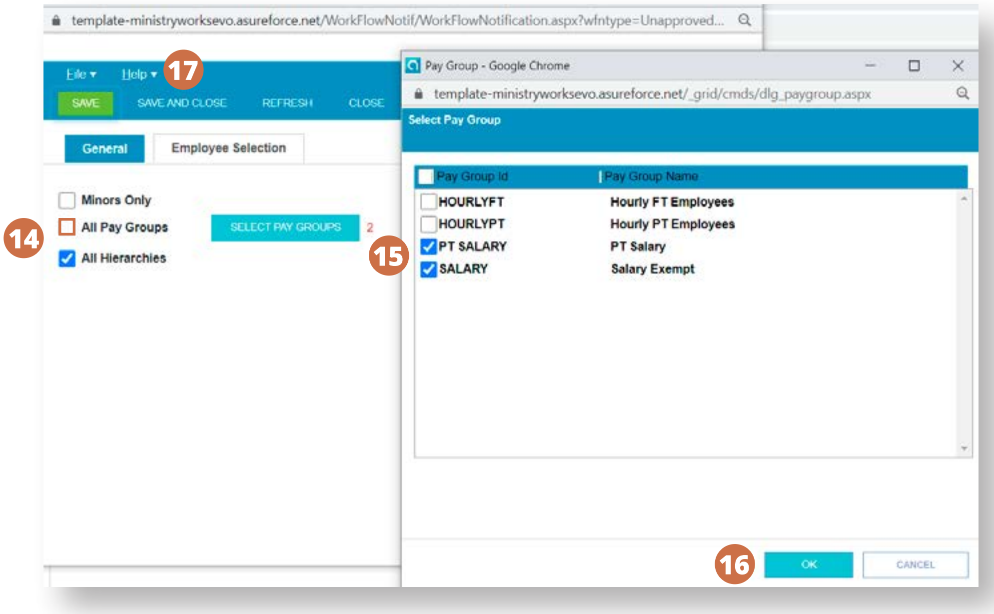
1. Click on the **Configurations** tab.
2. Click **Workflow Notification**.
3. Click **New Notification**.
4. Select a notification type.
5. Click **OK**. The new workflow notification setup will be displayed.



6. On the **General** tab, enter a **Title** for the notification.
7. The **Message Text** will pre-populate with the message that was just created.
8. Check the box for Send notification as E-Mail.
9. In the **Scheduling** area, select **Recurring**.
10. Click **SCHEDULE**.
11. On the **Set Recurrence** screen, customize when the message should be sent.
12. Click **OK**.
13. Click **SAVE AND CLOSE**.



14. On the **Employee Selection** tab, the **All Pay Groups and All Hierarchies** will be checked as default.
15. If you want to have the rule only apply to certain pay groups, uncheck **All Pay Groups** and select the applicable pay groups from the popup box.
16. Click **OK**.
17. Click **SAVE AND CLOSE**.

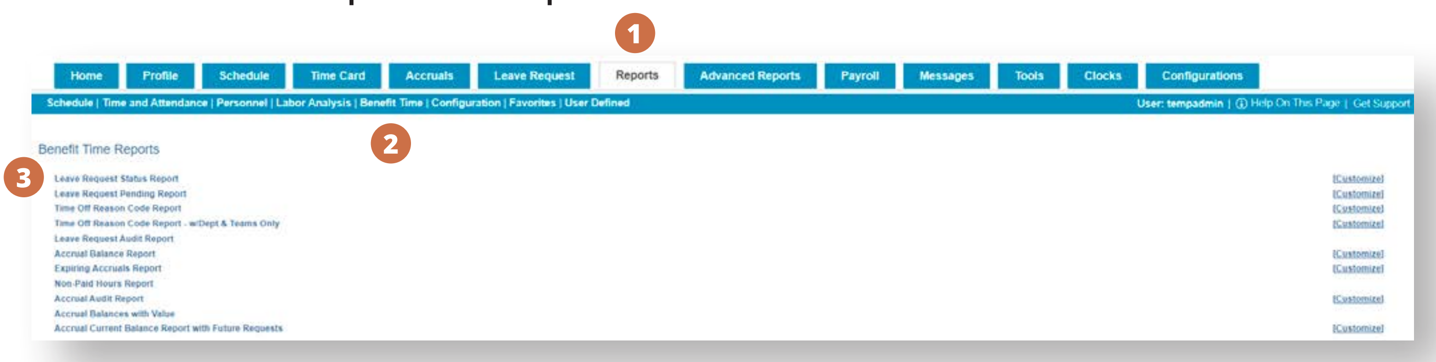


Reports

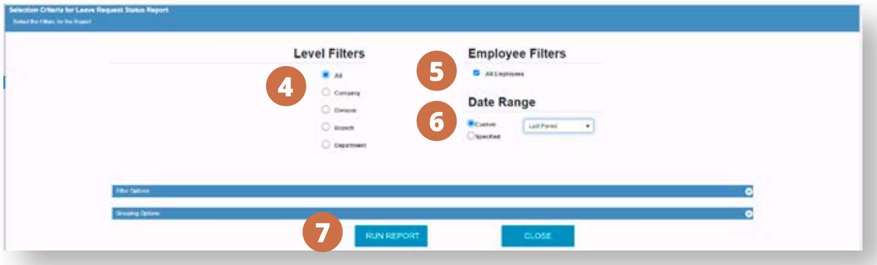
Leave Request Status Report

This report can be pulled to view all leave requests for a specific time frame. This report can be used to check that all approved leave requests are reflected on the time cards.

1. Click on the **Reports** tab.
2. Click on **Benefit Time**. Feel free to explore this area to see if additional reports will be beneficial.
3. Click on **Leave Request Status Report**.



4. **Level Filters** – default is **All** but can be broken down into department reports.
5. **Employee Filters** – default is **All Employees** but individual employees can be selected.
6. **Date Range** – default is the **Current** week; but it is we suggest that you look at either the **Last Period** or the **Current** Period.
7. Click **RUN REPORT**.

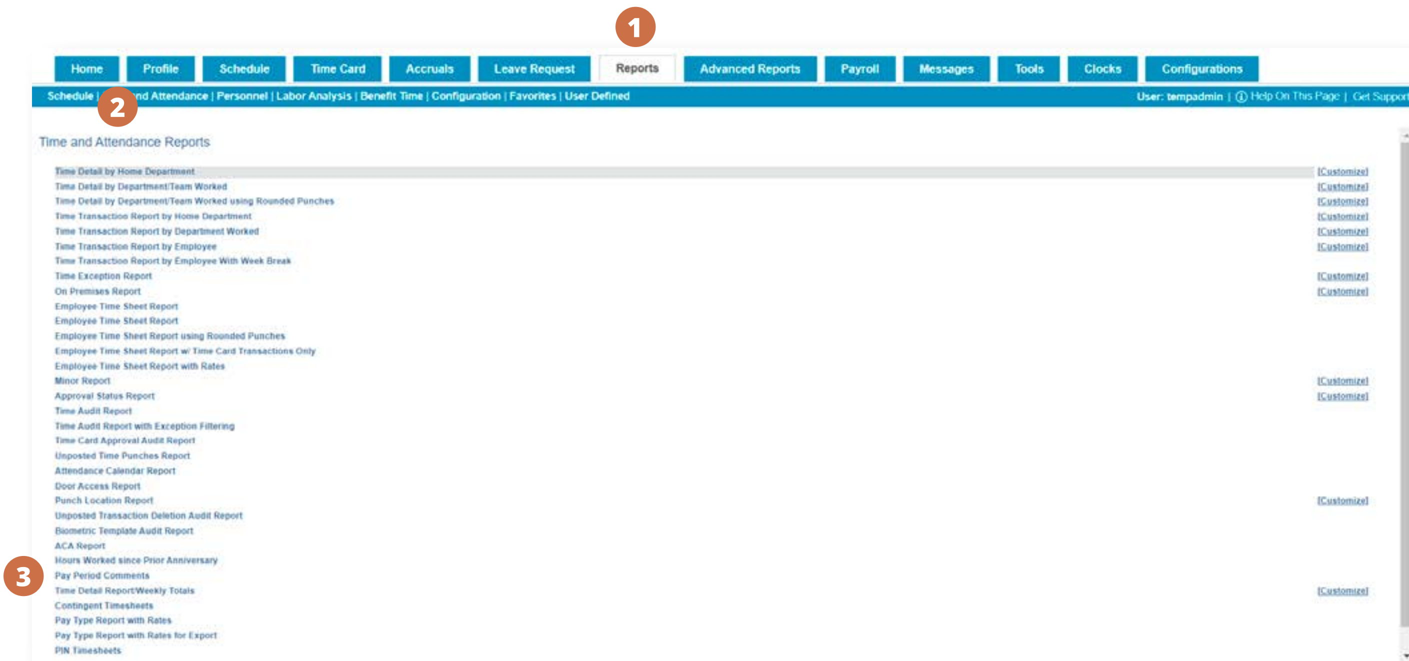


The Leave Request Status Report will be displayed. Go to each individual employee's time card to confirm the approved leave requests are reflected.

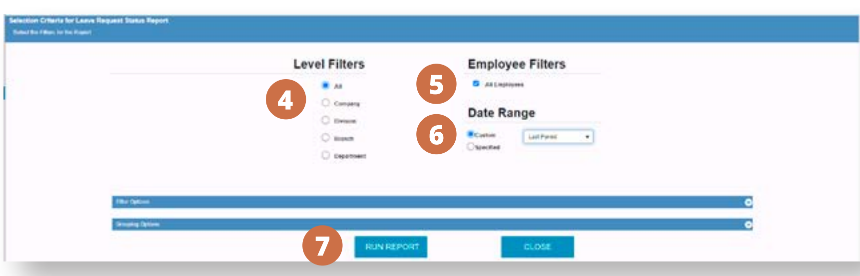
Pay Period Comments Report

This report can be pulled to view all comments that have been made by employees for a specific time frame.

1. Click on the **Reports** tab.
2. Click on **Time and Attendance**. Feel free to explore this area to see if additional reports will be beneficial.
3. Click on **Pay Period Comments**.



4. **Level Filters** – default is **All** but can be broken down into department reports.
5. **Employee Filters** – default is **All Employees** but individual employees can be selected.
6. **Date Range** – default is **Current** week; but it we suggest that you look at either **Last Period** or **Current** Period.
7. Click **RUN REPORT**.



The **Pay Period Comments** report display. Review to see if action is needed.

Wednesday August 3, 2022
7:54:42 PM

Pay Period Comments
Pay Period Commments
January 01, 2022 - December 31, 2022

CLOSE

User ID: tempadmin

CSV

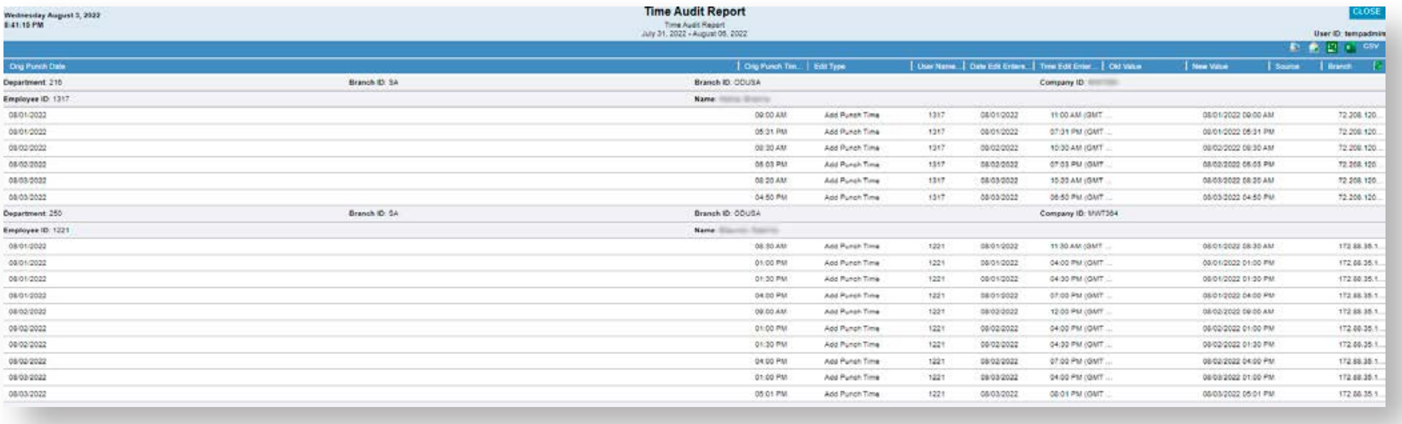
Name	Pay Period Comments
[illegible]	Finance Team building
[illegible]	On 7/27 thru 7/29, I had to adjust my times because I didn't log in and out at normal times due to activities.
[illegible]	On Fri 7-22, I adjusted the lunch time by 1 hour because Kathy ordered lunch for all of us and I had to take it at that time, but I didn't want the penalty for the 5 hr ...
[illegible]	On 6/27, deleted last punch since it was an accident. On 7--06-22, I couldn't log off until later in the evening since site wasn't working when I went to log off at 6:1...
[illegible]	On 6/22 Had dental appt..11:30 - 1:30 pm. Made up the time same day so I worked a full 8 hr shift, (KS)
[illegible]	6/27 - started 11:00 am due to a 9:30 am PostOp medical visit. On 7/5 I had a medical appt and returned to work for 2 1/2 more hrs. to complete a 8 hr shift.
[illegible]	Team Days 7/25 thru 7/29. Checked in late 7/28 @ 12:30 pm due to medical appt.
[illegible]	time clock set incorrectly at first punch so had to correct in time

Audit Reports

There are several audits that you can pull to see what happened, by whom, and when it occurred.

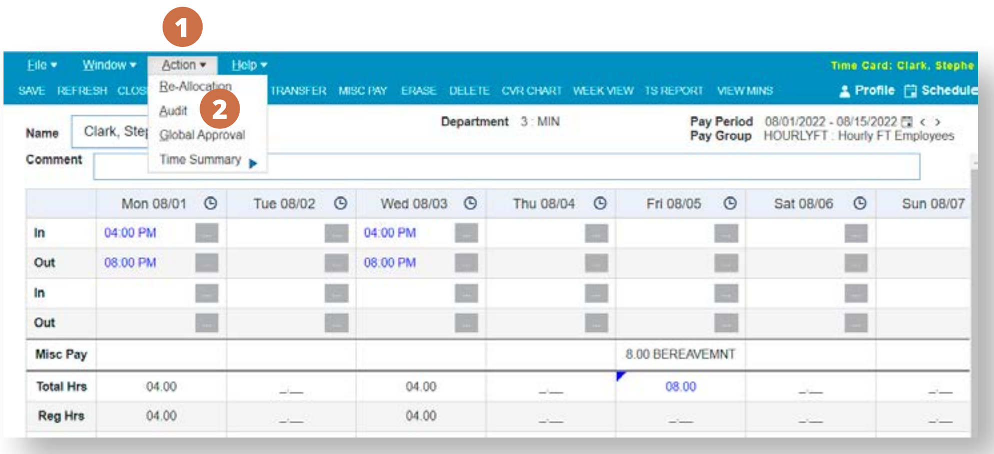
Time Audit Report

Reports tab >Time and Attendance > Time Audit Report
This audit shows details about the punches for all employees, including the location of each punch.

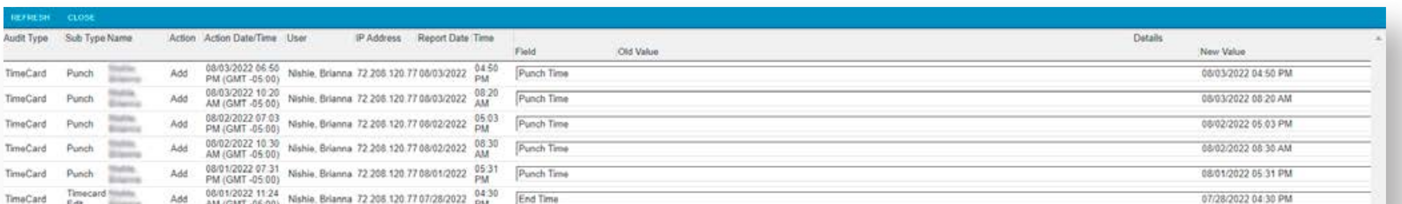


A time card audit can also be generated on an individual employee's time card.

1. Click **Action**.
2. Click **Audit**.



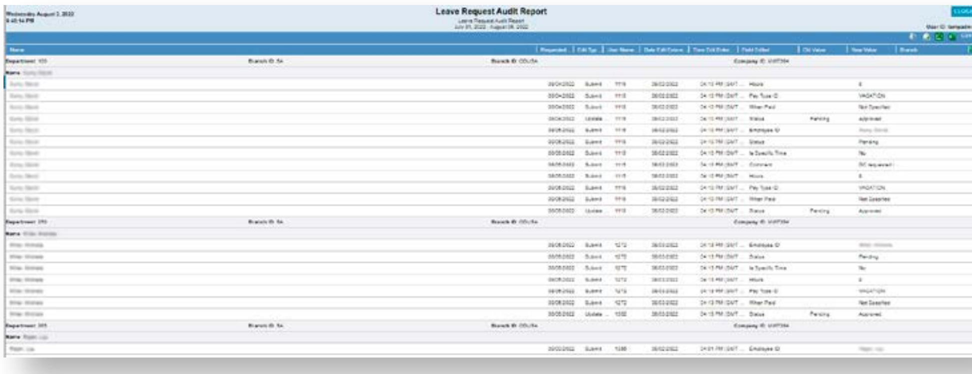
The audit will display.



Leave Request Audit Report

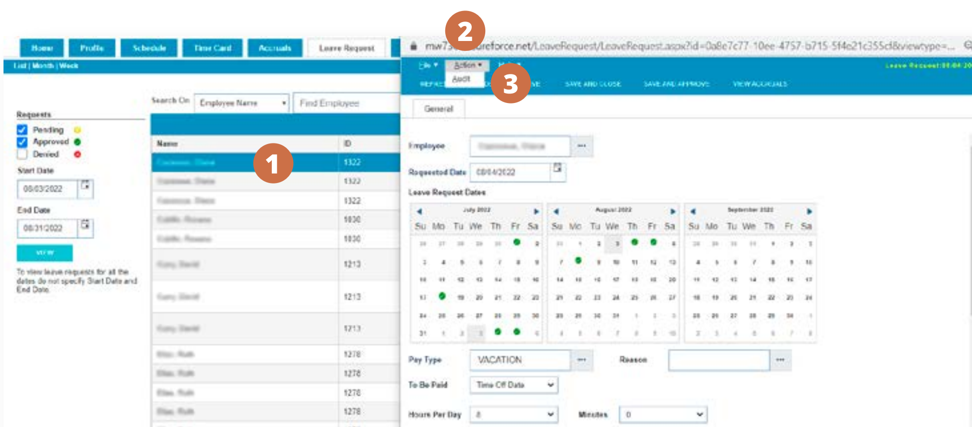
Reports tab > Benefit Time > Leave Request Audit Report

This audit shows details about all leave requests.

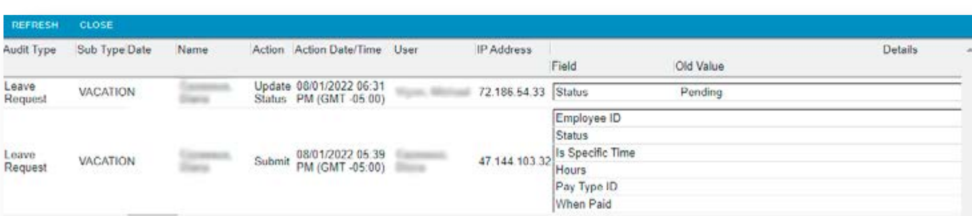


A leave request audit can also be generated on each individual leave request.

1. From the **Leave Request** tab, double-click on a specific leave request.
2. From the popup, click on **Action**.
3. Click **Audit**.



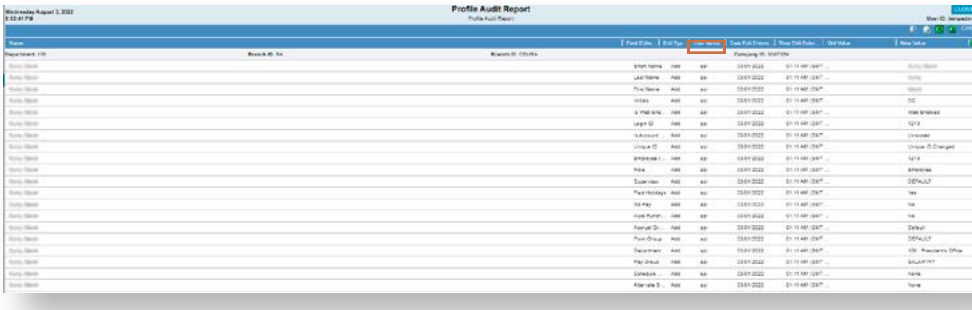
The audit will display.



Profile Audit Report

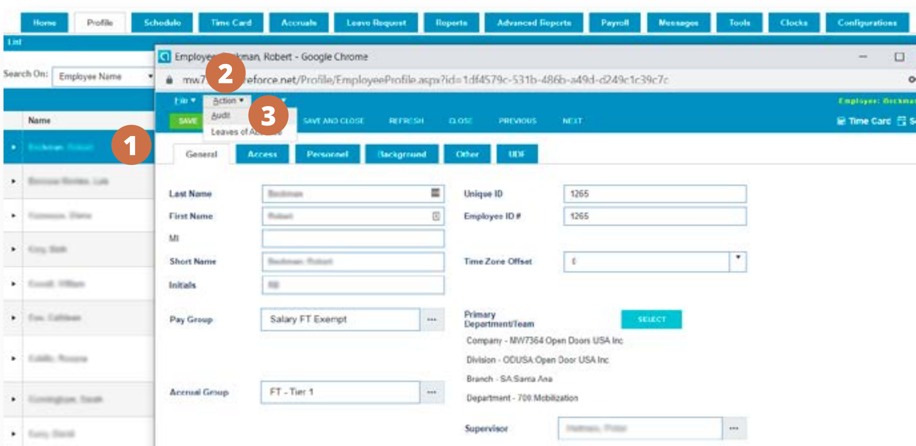
Reports tab > Personnel > Profile Audit Report

This audit shows details about the employee's profile setup in *Time & Attendance*. Most of this information will be synchronized from "api" (user name column), which means that it was pushed from other MinistryWorks platforms.



A profile audit can also be generated on each individual's profile.

1. From the **Profile** tab, double-click on a specific employee.
2. From the popup, click on **Action**.
3. Click **Audit**.



The audit will display.