

HARMONY

TIME & ATTENDANCE
ADMIN USER MANUAL



V.1.4

PAYMATE SOFTWARE CORPORATION
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Common Icons and Symbols

Refer to the table below for common icons, buttons, and symbols that are used throughout the Harmony application and user manual.

Icon / Symbol	Description
	Menu button. Click this button to shrink or expand the navigation menu. You may also see this symbol when reordering items in a section.
	Save button. Click this button to save all your changes for the current page.
	Delete button. Click this button to delete the item from the database.
	Module navigation button. Click this button to view your available modules.
	Maximize/minimize button. Click this button to view Harmony in full screen or minimized.
	Notifications. Click this button to view your notifications. A red bubble will appear if you have notifications, with the number of unread notifications.
	Toggle. Click this toggle to activate/deactivate an item.
	Send button. Click this button to send the item for approval.
	Refresh button. Click this button to refresh your selection.
	Add or remove button. Click on this button to add or remove a field.
	View button. Click on this button review the record.
	Edit button. Click on this button to edit the field.
	Checkboxes. Click it to check or uncheck the box.
	Date icon. Click the field with this icon to select a month and date.
	Time icon. Click the field with this icon to select a time.
	Filter button. Click this button to view available filters for the data on the page.
	Print button. Click this button to print the item.
	Download button. Click this button to download the item. It will automatically be downloaded to your browser's default downloads folder.
	Search icon. Use the search bar to search for specific items or employees.
	Warning message. It will notify you that you should proceed with caution.
	Helpful tip message. It will provide you with suggestions, recommendations, or tips.
'Dropdown'	Dropdown field options that can be selected will be bolded and in single quotation marks.
'Tab'	Tabs within a window that can navigated to will be in single quotation marks.
"Button"	Buttons will be bolded and in double quotation marks.
<i>"Radio"</i>	Radio field options that can be selected will be italicized and in double quotation marks.
<u><i>"Field"</i></u>	Fields will be italicized, underlined, and in double quotation marks.

Welcome to Harmony

Thank you for selecting Harmony as your Time & Attendance (T&A) solution. Harmony's user interface was developed with the best technology in the market, so you can easily use the application, no matter where you are. Considering both the basic and advanced features of Harmony T&A, we recommend that you visit Paymate's knowledge base to view our comprehensive articles and watch our how-to videos to get the most out of Harmony. You can also email Paymate support at support@paymatesoftware.com if you require additional help or have any specific questions.

About Harmony Time & Attendance

Harmony is a hosted application available for the U.S. and Canada. The hosted nature of this software means all your data is stored on the cloud for easy access. You can access it with any browser, including Microsoft Edge, Mozilla Firefox, Google Chrome, Safari, and more. Harmony conveniently lets you add and access an unlimited number of companies with a single login. Due to its modular nature, Harmony works well with a single module or with all its modules, including Payroll, T&A, Human Resources (HR), and Employee Self-Service (ESS).

Harmony T&A helps you easily track time yet still provides the core functions you need, all in a single place. From providing options to track time, including Harmony's in-software time tracker or integration with time clocks, to managing time off, or PTO, simpler and easier, Harmony T&A is the ideal solution for you.

About This User Manual

This guide will outline the process of implementing the Time & Attendance module for a new company in Harmony, as well as provide an understanding of how to use the system as a user. Be aware that this user manual will outline all super-administrative user functionality. This manual is not intended for users with limited or restricted permissions. You may refer to Paymate's knowledge base for the manager/approver or employee user manuals.

Throughout this guide, Time & Attendance will be abbreviated to "T&A". When corresponding with Paymate, this abbreviation may be used. Throughout the setup, any field that is required will have the field underlined in red, indicating that it must be filled. Once the field is filled, the red underline will disappear. This will be important to understand how to properly set up T&A with all the required information.

Software Version

v1.52.6



This user manual is not updated for every version. Please review Paymate's release notes for the latest features and announcements.

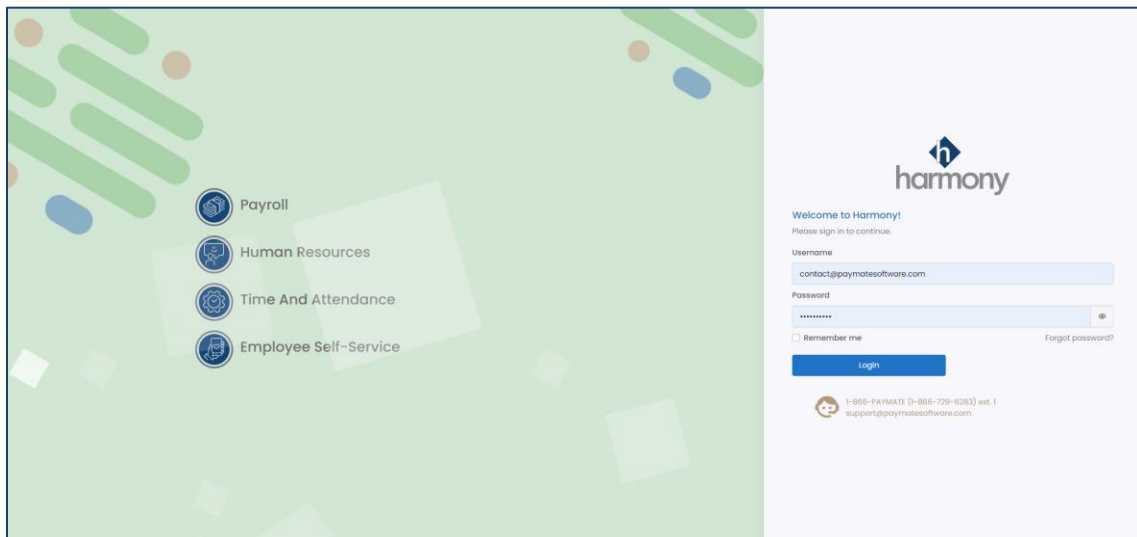
1.0 Logging In

Paymate will provide you with your user credentials and URL to access Harmony. These credentials belong to the administrative account and will have the widest permissions available.

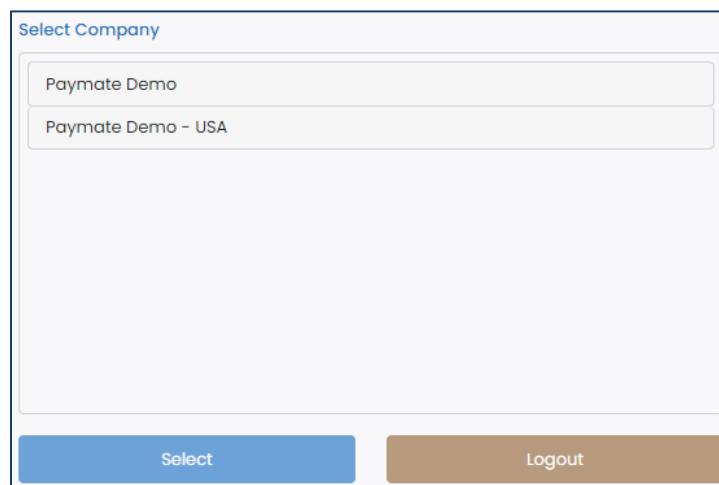
1. Copy the Harmony URL that was provided to you.
2. Open your web browser and paste the URL to navigate to Harmony.
3. Enter your credentials.
4. Click **“Login”**.



The administrative user account has the highest access level of all user accounts in the software. It is the **ONLY** user account that can add or delete other user accounts in Harmony. If you do not have your credentials to log into Harmony, please contact Paymate.



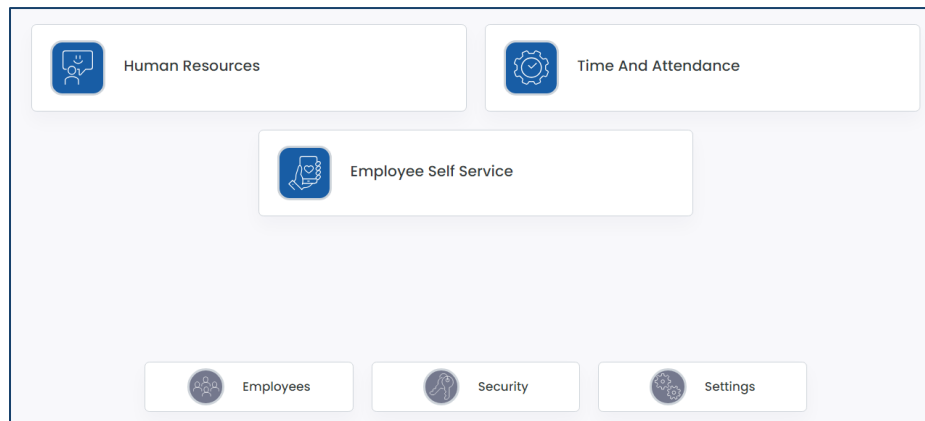
5. Select your company.
6. Click **“Select”** to log into the selected company. You will be brought to the module selection screen.



2.0 Selecting a Module

Upon logging in, you will be able to select a module. Purchased modules are shown at the top with blue icons, while modules that are available with any module of Harmony are shown at the bottom with grey icons.

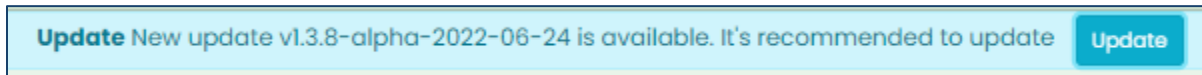
- *Human Resources* includes features such as onboarding, offboarding, document management, training, performance management, time off/PTO/absence management, and more.
- *Time & Attendance* includes features such as time tracking, time off/PTO/absence management, overtime rules, rounding rules, and more.
- *Employee Self-Service* includes employee self-help options, including access to their own paystubs and/or tax forms, requesting time off/PTO, updating their own profile and contact information, and more.
- *Employees* are where your employees will be listed. You can create new employees or update existing employee information in this section.
- *Security* is where you will create user accounts to access the system, as well as update or modify any permissions/rights for these user accounts.
- *Settings* are where you set up the company's preferences and basic configuration of your company.



Depending on what modules you have purchased, the modules shown on the module selection screen may differ from the screenshot provided above. If you have purchased specific modules but do not see them in your module selection screen, please contact Paymate Support.

3.0 Upgrading Your Database

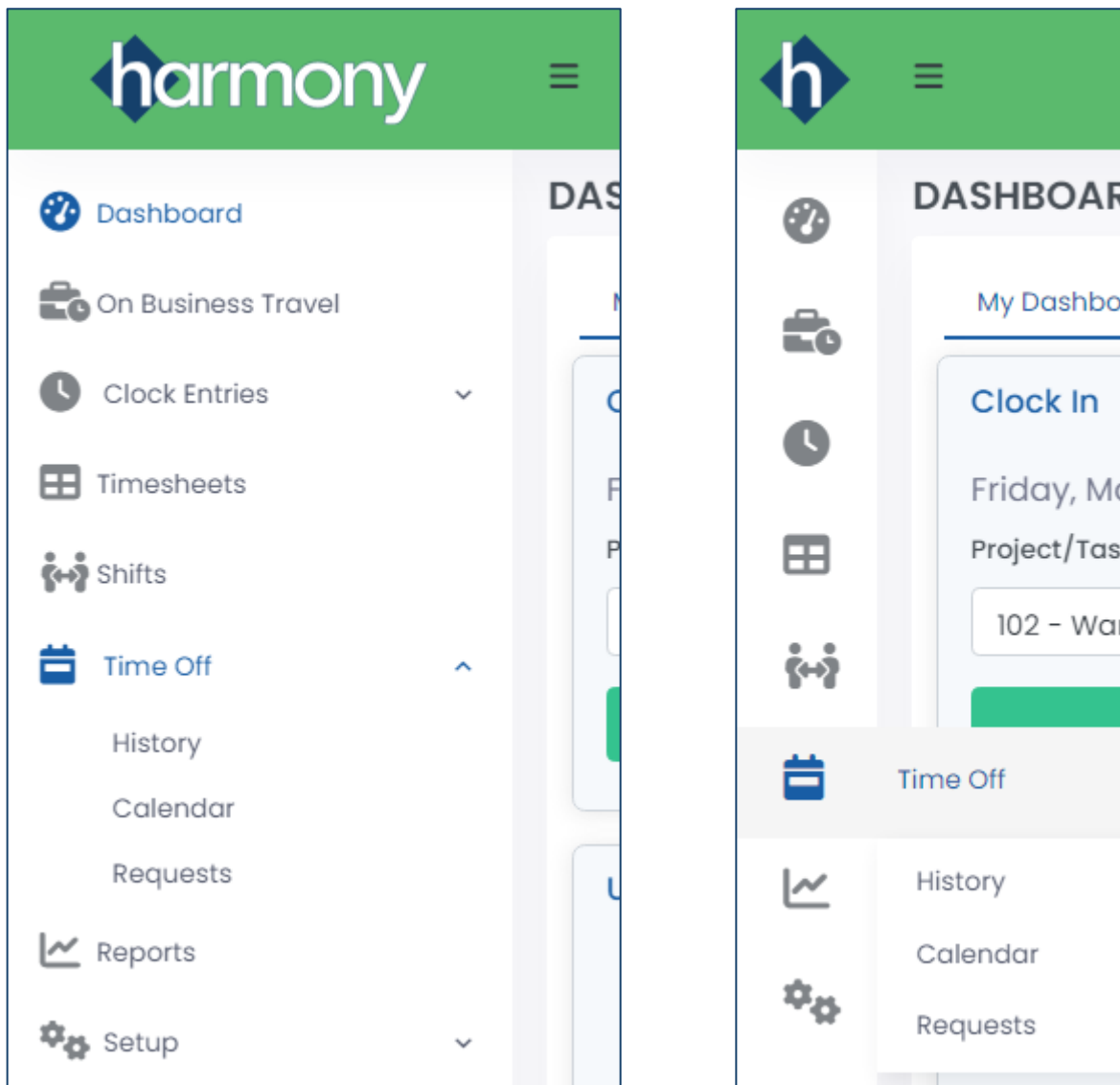
Because Harmony is hosted on Microsoft Azure, you will receive notifications when there are new updates available. When a new version of Harmony is available, you will receive a message that prompts you to update your company database version upon logging in. Just click **“Update”** and Harmony will update your database automatically. You may also view the release notes by clicking on the **“What’s New?”** link.



4.0 Navigating Through Harmony

Navigating around Harmony is simple. The navigation bar on the left side of your screen allows you to flow from one page to another easily. Icons will help you quickly identify what section you're looking for, such as the dashboard, your timesheets, the time off calendar, or the setup. Sub-menus can also be found, even if you are using the collapsed version of the navigation menu. You can click the Menu button at the top of the application to collapse or expand the navigation menu.

The screenshots below depict the navigation menu for T&A, but the same layout is used in all modules.

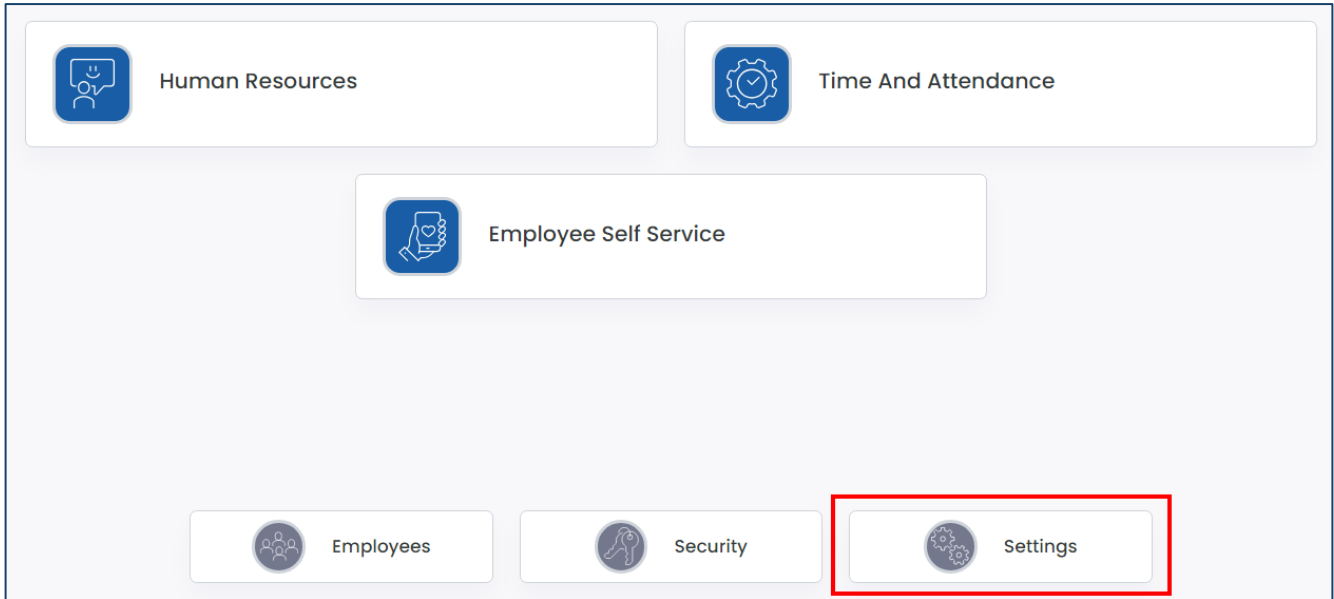


5.0 Basic Company Configuration

From the module selection screen, navigate to *Settings*.

5.1 Setup

From the module selection screen, navigate to *Settings*. The *Setup* is where your company's main information is set up. These components must be completed first before you can properly use the T&A module.



5.2 Company Information

This is where you can enter your company's legal information.

1. Navigate to Setup > Company.
2. Enter your company's details in the fields under *Company Details*.

Field Name	Description
<u>"Company Name"</u>	Your company's legal entity name.
<u>"Address"</u>	Your company's main address. The second line can be used for the suite or unit of the address, if any.
<u>"City"</u>	Your company's city for the main address.
<u>"Postal Code"</u>	Your company's postal or ZIP code for the main address.
<u>"Country"</u>	Your company's country for the main address.
<u>"Province/State"</u>	Your company's province, state, or territory for the main address.
<u>"Company Phone"</u>	Your company's phone number.
<u>"Extension"</u>	Your company's extension at the phone number, if any.
<u>"Fax"</u>	Your company's fax number.
<u>"Company Email"</u>	Your company's main email address.
<u>"Company Website"</u>	Your company's main website.

Company Details

Company Name

Address

City Postal Code

Country x ▾

Province/State x ▾

Company Phone Extension

Fax

Company Email

Company Website

3. Enter the primary contact person's information under *Contact Person*.

Field Name	Description
<u>"First Name"</u>	The first name or given name of the company's main contact.
<u>"Last Name"</u>	The last name or surname/family name of the company's main contact.
<u>"Position"</u>	The contact person's job title.
<u>"Telephone"</u>	The contact person's phone number.
<u>"Extension"</u>	The contact person's extension at their phone number, if any.

Contact Person

First name

Last name

Position

Telephone Extension

4. Click the save button to save your changes.

5.3 Preferences

Your *Preferences* will set the default selections and formatting rules for the rest of Harmony.

1. Navigate to Setup > Preferences.
2. Enter the required fields under *System Settings*. These will be the formatting rules for the application.

Field Name	Description
<u>"Date Format"</u>	The formatting of dates, such as date of birth, in the system. "M" refers to the month, "D" refers to the date, and "Y" refers to the year.
<u>"Name Display Format"</u>	The formatting of employee names in the system.
<u>"Default Holiday Calendar"</u>	The default holiday calendar of which your employees will be assigned to.
<u>"Fiscal Year"</u>	The fiscal year for your company. This affects items such as time off.
<u>"Two Factor Authentication"</u>	Enable/disable two-factor authentication for the current user that is logged in. If enabled, the user will receive an email with a code in order to log into Harmony, as an extra layer of security.

System Settings

Date Format × ▾

Name Display Format × ▾

Default Holiday Calendar × ▾

Fiscal Year × ▾ × ▾

Two Factor Authentication

3. Enter the required fields under *Employee Settings*. These will be the default settings whenever you create a new employee, which you can also override later.

Field Name	Description
<u>"Default Country"</u>	Identifies the employee's country. If you mainly have employees in a single country, you can select it here.
<u>"Default Province / State"</u>	Identifies the employee's province, state, or territory. If you mainly have employees in a single province/state, you can select it here.

<u>“Default Time Zone”</u>	Identifies the employee’s time zone. If you mainly have employees in a single time zone, or if your organization operates in a particular time zone, you can select it here.
<u>“Default Department”</u>	Identifies the employee’s department.
<u>“Default Location”</u>	Identifies the employee’s location.

Employee Settings

Default Country	Canada x ▼
Default Province / State	Ontario x ▼
Default Time Zone	Canada/Eastern x ▼
Default Department	1 - Administrator x ▼
Default Location	3 - Ontario x ▼

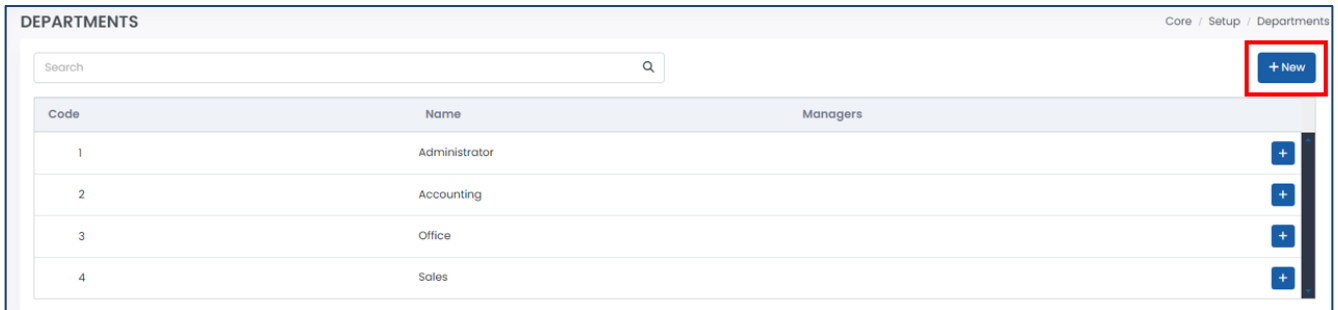
4. Click the save button to save your changes.

5.4 Departments

You can group your employees by *Departments* for use of pulling up reports or separating your general ledger in the Payroll module.

5.4.1 Creating a Department

1. Navigate to Setup > Departments.
2. Click “+ New” to create a new department.



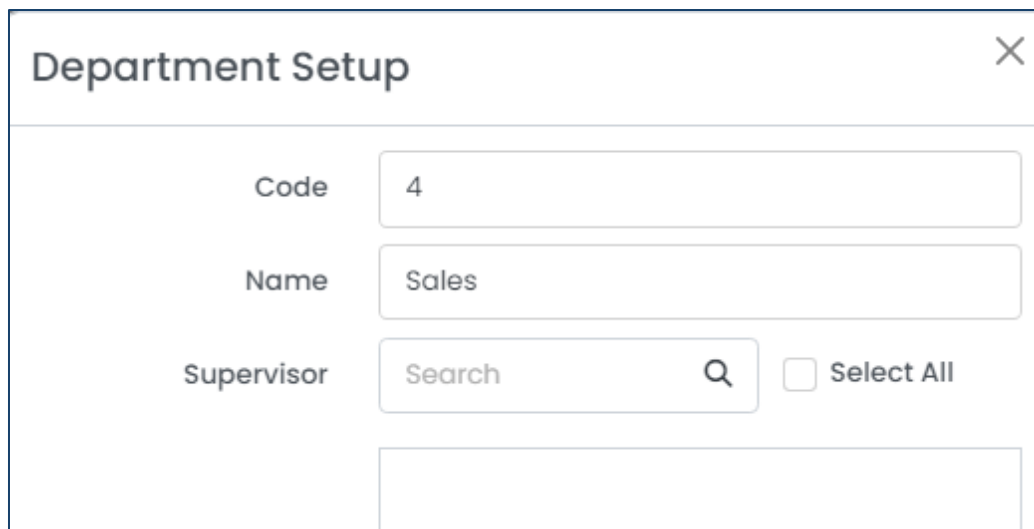
Code	Name	Managers
1	Administrator	
2	Accounting	
3	Office	
4	Sales	



Harmony supports multi-tiered departments. If you'd like to create a sub-department, click the “+” button on the preceding (parent) department instead.

3. Enter the required fields.

Field Name	Description
<u>“Code”</u>	Unique ID for the department, such as a short name.
<u>“Name”</u>	The name of the department.
<u>“Supervisor”</u>	Identifies the department supervisor or manager. The employee must have “Is a manager” ticked in their employee profile.
<u>“Description”</u>	An optional field to provide more information about the department.



Department Setup

Code: 4

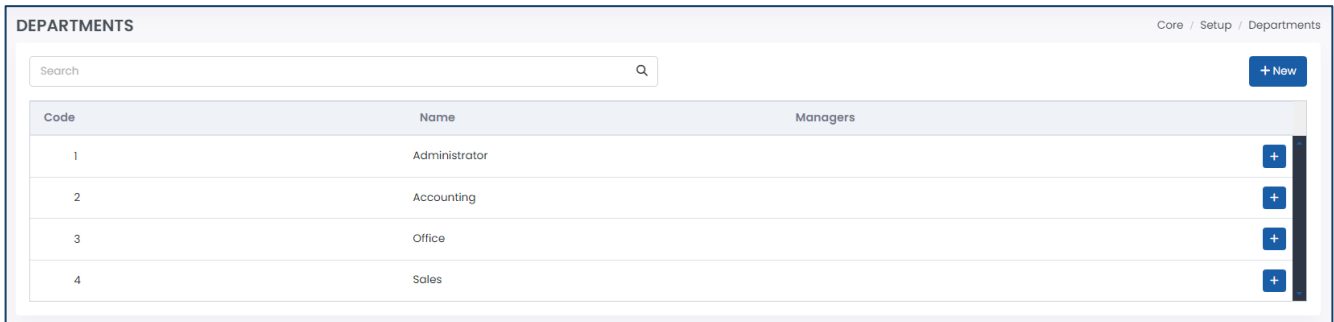
Name: Sales

Supervisor: Search [Q] Select All

4. Click the save button to save your changes.

5.4.2 Editing a Department

1. From the list of departments, select the department you want to edit.



The screenshot shows a web interface titled "DEPARTMENTS" with a breadcrumb "Core / Setup / Departments". It features a search bar and a "+ New" button. Below is a table with columns "Code", "Name", and "Managers".

Code	Name	Managers
1	Administrator	
2	Accounting	
3	Office	
4	Sales	

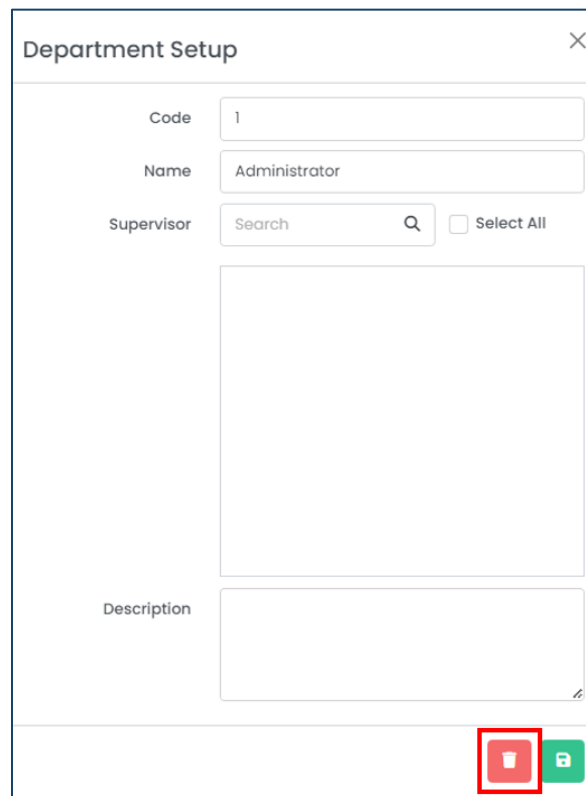
2. Edit the fields as required.
3. Click the save button to save your changes.

5.4.3 Deleting a Department



If the department is already assigned to an employee, you cannot delete the department. You must assign the employee(s) to another department before attempting to delete it.

1. From the list of departments, select the department you want to delete.
2. Click the delete button to delete the department.



The "Department Setup" dialog box contains the following fields:

- Code: 1
- Name: Administrator
- Supervisor: Search (with a magnifying glass icon) and a "Select All" checkbox.
- Description: (empty text area)

At the bottom right, there are two buttons: a red trash can icon (delete) and a green lock icon (save).

-
3. Harmony will ask for your confirmation that you want to delete the department. Click **“Delete”** to delete the department. The department is now deleted.

Are you sure you want to delete this Department?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



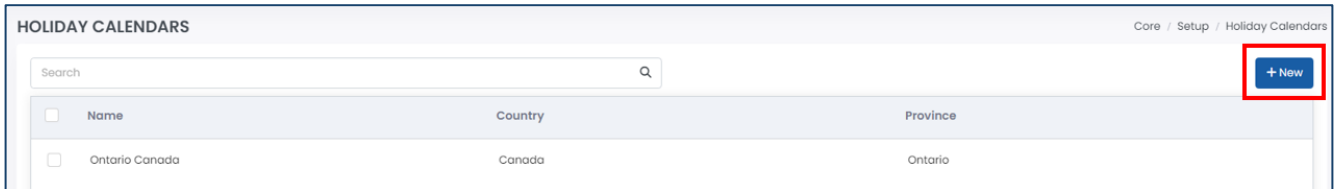
If you accidentally deleted a department, you can re-create the department manually.

5.5 Holiday Calendars

Your holiday calendars will directly impact most of the modules you purchase, including Payroll, Human Resources, and Time & Attendance. The dates in your holiday calendar will be relevant when your employees request time off, work overtime, or get paid statutory holidays.

5.5.1 Creating a Holiday Calendar

1. Navigate to Setup > Holiday Calendars.
2. Click **“+ New”** to create a new holiday calendar.

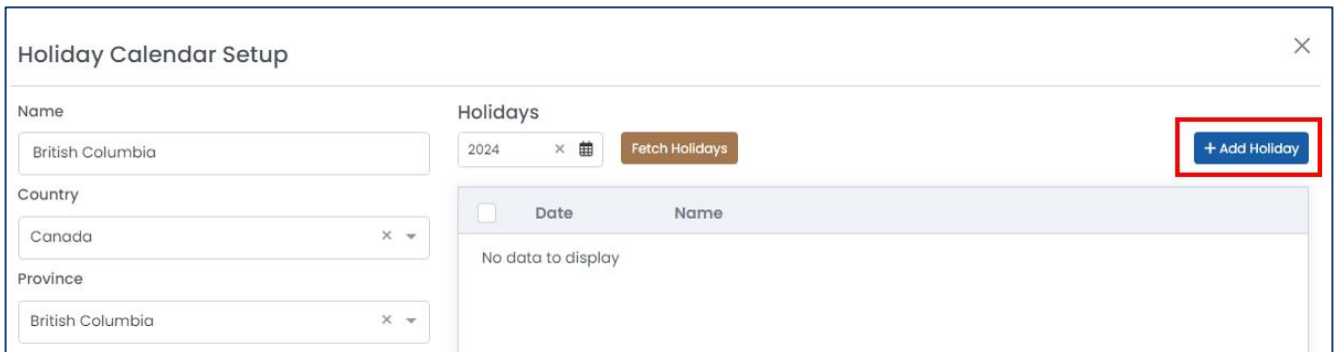


3. Enter the required fields.

Field Name	Description
<u>“Name”</u>	The name of the holiday calendar.
<u>“Country”</u>	The country of which the holiday calendar is for.
<u>“Province”</u>	The province, state, or territory of which the holiday calendar is for.

The screenshot shows a form for creating a new holiday calendar. It has three main sections: 'Name' with a text input field containing 'British Columbia'; 'Country' with a dropdown menu showing 'Canada' and a close button 'x'; and 'Province' with a dropdown menu showing 'British Columbia' and a close button 'x'.

4. Click **“+ Add Holiday”** to add a holiday into the holiday calendar.



5. Enter the required fields.

Field Name	Description
<u>"Name"</u>	The name of the holiday.
<u>"Date"</u>	The date of the holiday.
<u>"Non-Statutory Holiday"</u>	Identifies if the holiday is a non-statutory holiday.
<u>"Half Day"</u>	Identifies if the holiday is a half day rather than a full day.
<u>"Description"</u>	An optional field to provide more information about the holiday.

Holiday Setup

Name

Date x

Non-statutory holiday

Half day

Description

6. Click the save button to save your changes.
7. Repeat steps 4 through 6 for each holiday in the calendar.
8. Click the save button to save your changes to the holiday calendar.
9. Repeat steps 2 through 8 for each province, state, or territory of which you have employees in.



Harmony includes a **"Fetch Holidays"** option in which the system will fetch the province/state/territory's federal holidays according to your selected country and province/state/territory. Ensure that you enter a year prior to fetching to correctly use this feature.

Holiday Calendar Setup x

Name

Country

Province

Holidays

2024 x
Fetch Holidays

+ Add Holiday

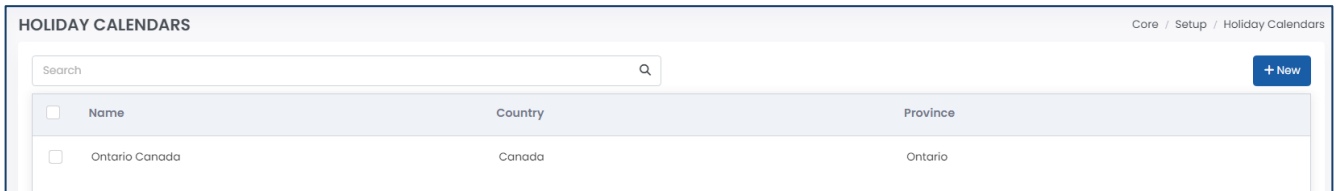
Date	Name
No data to display	



Once the holiday calendars are set up, you must assign them to the respective employees in the T&A module after you've set up your employees.

5.5.2 Editing a Holiday Calendar

1. From the list of holiday calendars, select the holiday calendar you want to edit.



HOLIDAY CALENDARS Core / Setup / Holiday Calendars

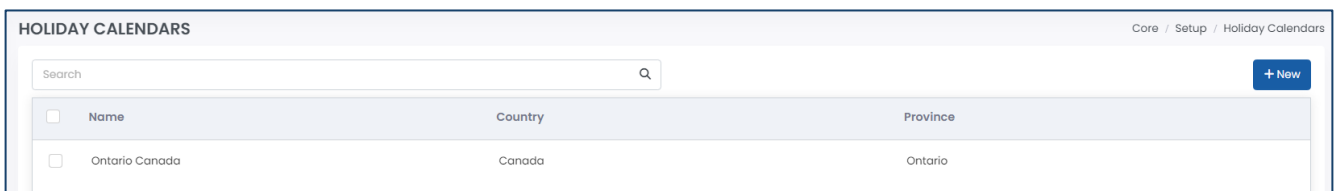
Search

<input type="checkbox"/>	Name	Country	Province
<input type="checkbox"/>	Ontario Canada	Canada	Ontario

2. Edit the holiday calendar as required.
3. Click the save button to save your changes.

5.5.3 Deleting a Holiday from a Holiday Calendar

1. From the list of holiday calendars, select the holiday calendar you want to delete a holiday from.

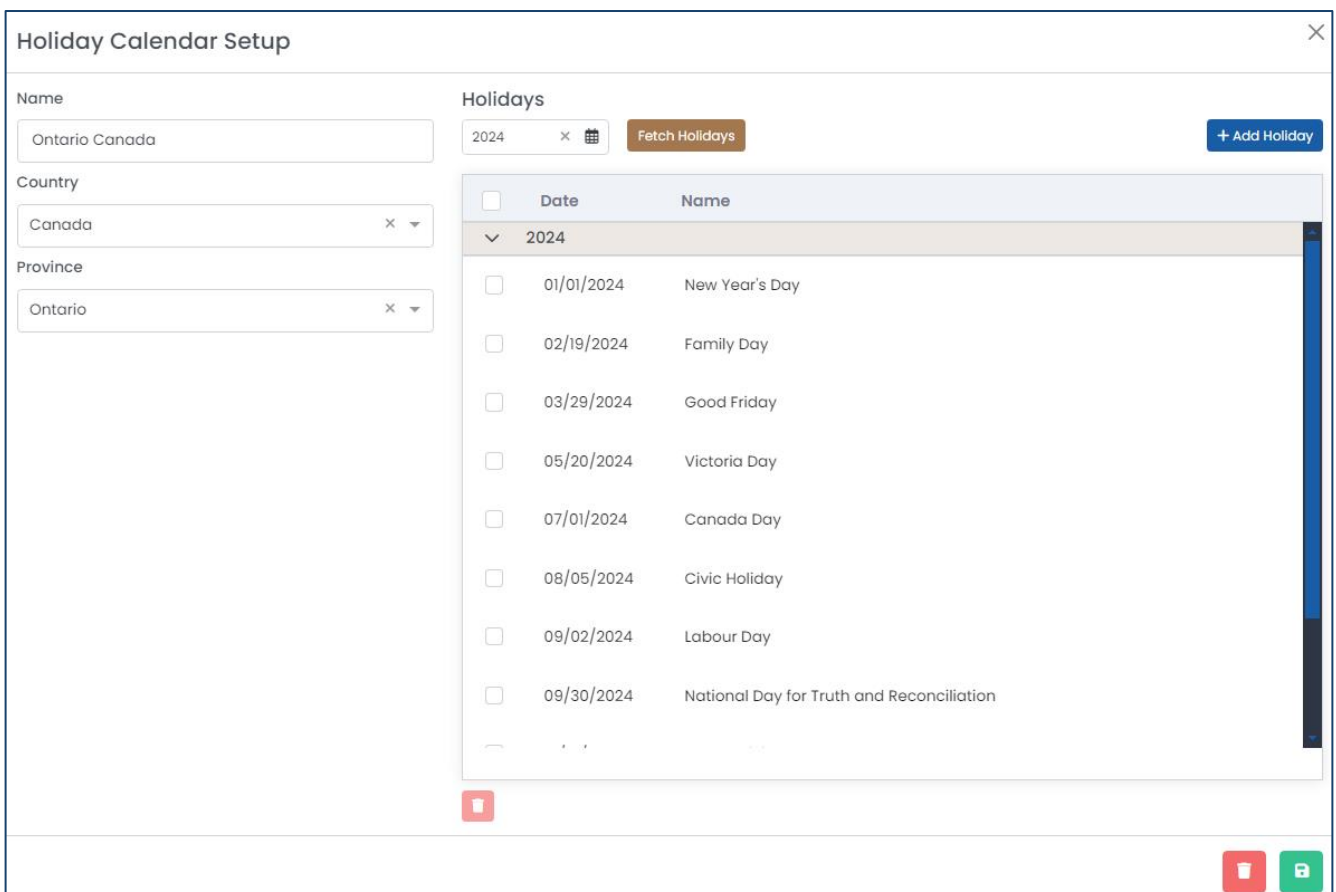


HOLIDAY CALENDARS Core / Setup / Holiday Calendars

Search

<input type="checkbox"/>	Name	Country	Province
<input type="checkbox"/>	Ontario Canada	Canada	Ontario

2. From the list of holidays, select the holiday you want to delete.



Holiday Calendar Setup X

Name

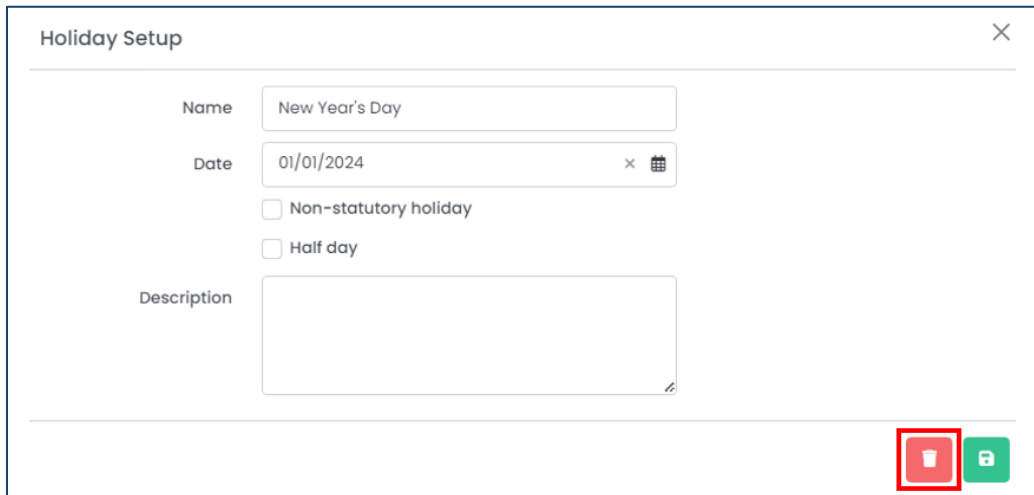
Country

Province

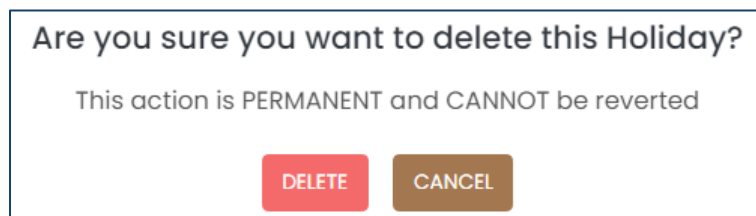
Holidays

<input type="checkbox"/>	Date	Name
<input type="checkbox"/>	01/01/2024	New Year's Day
<input type="checkbox"/>	02/19/2024	Family Day
<input type="checkbox"/>	03/29/2024	Good Friday
<input type="checkbox"/>	05/20/2024	Victoria Day
<input type="checkbox"/>	07/01/2024	Canada Day
<input type="checkbox"/>	08/05/2024	Civic Holiday
<input type="checkbox"/>	09/02/2024	Labour Day
<input type="checkbox"/>	09/30/2024	National Day for Truth and Reconciliation

3. Click the delete button to delete the holiday.



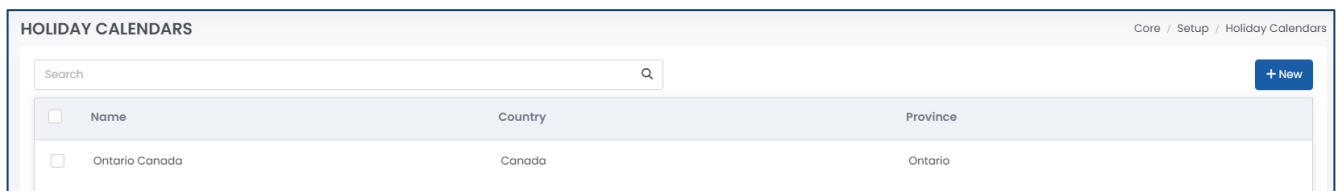
4. Harmony will ask for your confirmation that you want to delete the holiday. Click **“Delete”** to delete the holiday. The holiday is now deleted.



If you accidentally deleted a holiday, you can re-create the holiday manually.

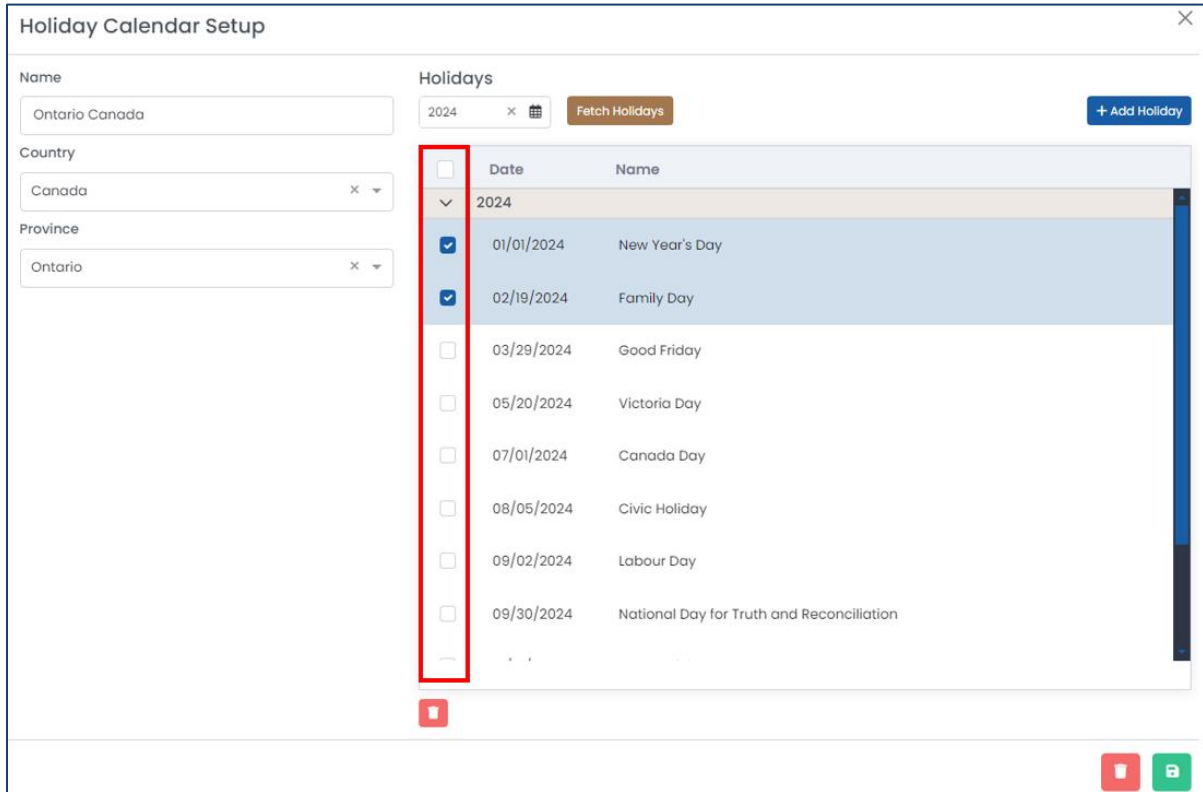
5.5.4 Mass-Deleting Holidays from a Holiday Calendar

1. From the list of holiday calendars, select the holiday calendar you want to delete a holiday from.

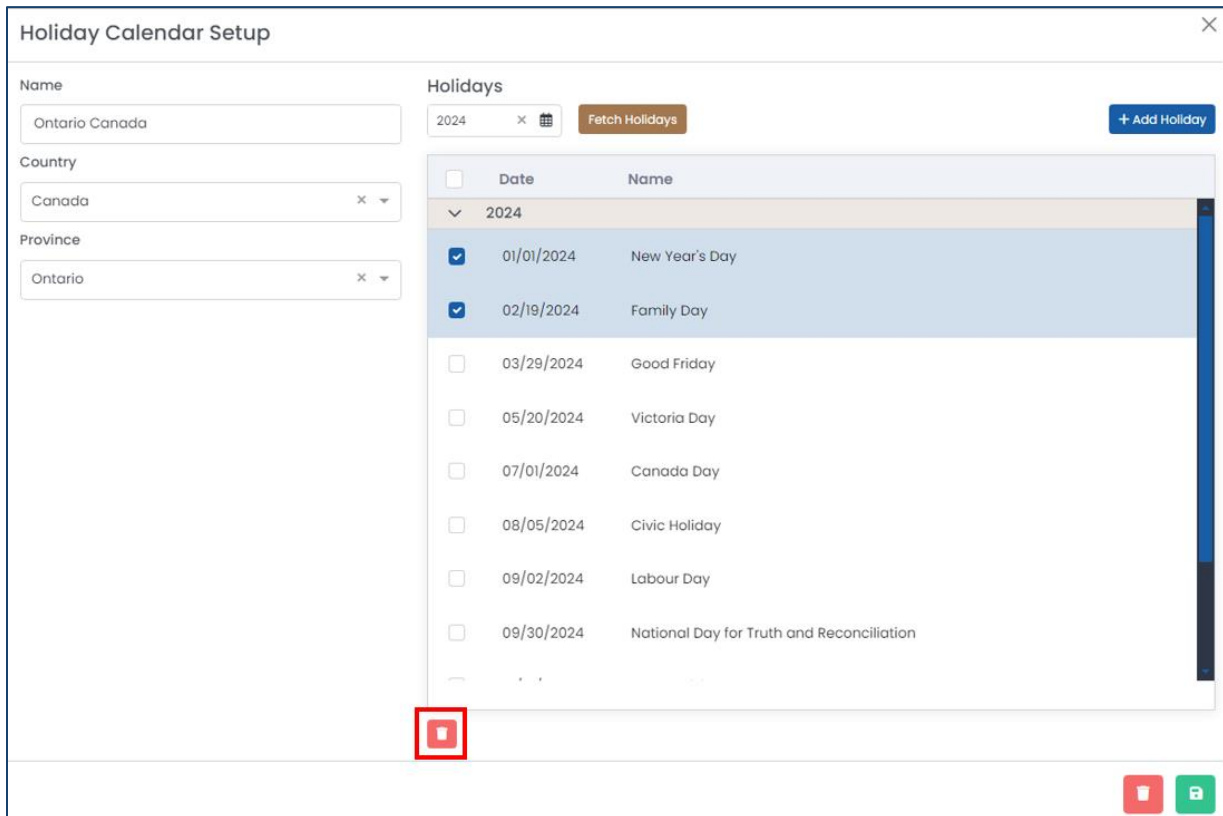


<input type="checkbox"/>	Name	Country	Province
<input type="checkbox"/>	Ontario Canada	Canada	Ontario

2. From the list of holidays, use the checkboxes to select the holidays you want to delete.



3. Click the delete button to delete the selected holidays.



4. Harmony will ask for your confirmation that you want to delete the selected holidays. Click **“Delete”** to delete the selected holidays.



If you accidentally deleted a holiday, you can re-create the holiday manually.

5.5.5 Deleting a Holiday Calendar



If the holiday calendar is already assigned to an employee, you cannot delete the holiday calendar. You must assign the employee(s) to another holiday calendar before attempting to delete it.

1. From the list of holiday calendars, select the holiday calendar you want to delete.
2. Click the delete button to delete the holiday calendar.

The screenshot shows the "Holiday Calendar Setup" window. On the left, there are input fields for "Name" (Ontario Canada), "Country" (Canada), and "Province" (Ontario). On the right, there is a "Holidays" section for the year 2024, with a "Fetch Holidays" button and a "+ Add Holiday" button. A table lists the following holidays for 2024:

Date	Name
01/01/2024	New Year's Day
02/19/2024	Family Day
03/29/2024	Good Friday
05/20/2024	Victoria Day
07/01/2024	Canada Day
08/05/2024	Civic Holiday
09/02/2024	Labour Day
09/30/2024	National Day for Truth and Reconciliation

At the bottom right of the window, a red trash can icon is highlighted with a red box, indicating the delete button.

3. Harmony will ask for your confirmation that you want to delete the holiday calendar. Click **“Delete”** to delete the holiday calendar. The holiday calendar is now deleted.

Are you sure you want to delete this Holiday Calendar?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



If you accidentally deleted a holiday calendar, you can re-create the holiday calendar manually.

5.5.6 Mass-Deleting Holiday Calendars

1. From the list of holiday calendars, use the checkboxes to select the calendars you want to delete.

The screenshot shows a web interface titled "HOLIDAY CALENDARS" with a search bar and a "+ New" button. A table with columns "Name", "Country", and "Province" is displayed. The first row, "Ontario Canada", "Canada", "Ontario", is selected, and its checkbox is highlighted with a red box. A red square button is visible at the bottom left of the table area.

<input checked="" type="checkbox"/>	Name	Country	Province
<input checked="" type="checkbox"/>	Ontario Canada	Canada	Ontario

2. Click the delete button to delete the selected holiday calendars.

The screenshot shows the same web interface as the previous one. The "Ontario Canada" row is still selected. A red box highlights the red square button at the bottom left of the table area, which is the delete button.

<input checked="" type="checkbox"/>	Name	Country	Province
<input checked="" type="checkbox"/>	Ontario Canada	Canada	Ontario

3. Harmony will ask for your confirmation that you want to delete the selected holiday calendars. Click "Delete" to delete the selected calendars.

Are you sure you want to delete this Holiday Calendar?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



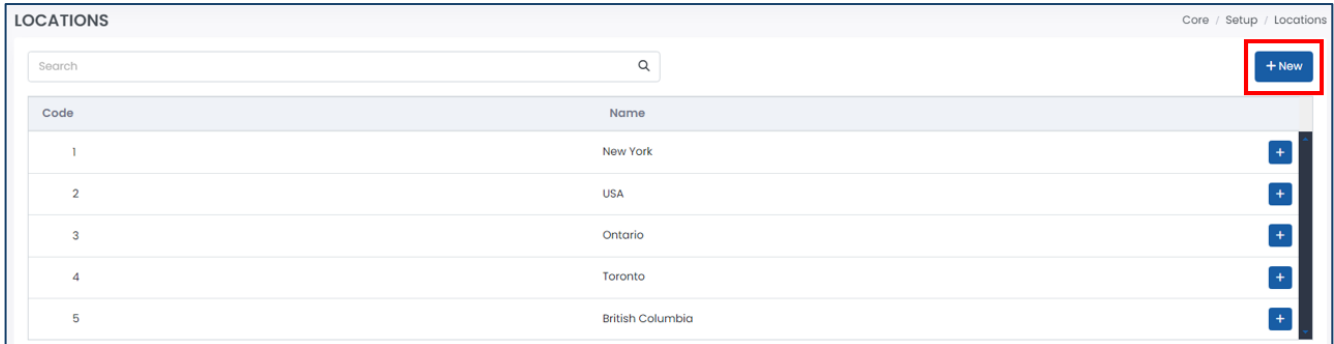
If you accidentally deleted a holiday calendar, you can re-create the holiday calendar manually.

5.6 Locations

You can group your employees by *Locations* for use of pulling up reports or separating your general ledger in the Payroll module.

5.6.1 Creating a Location

1. Navigate to Setup > Locations.
2. Click “+ New” to create a new location.



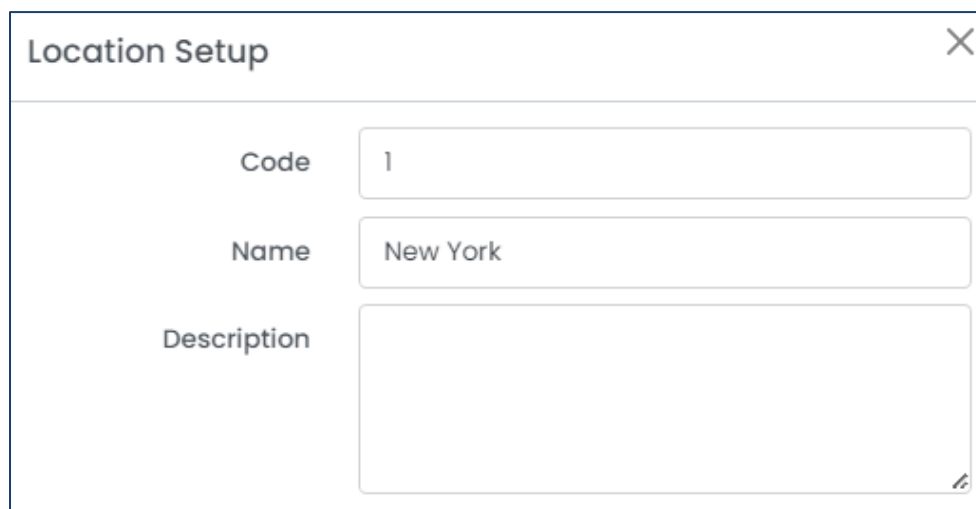
Code	Name	
1	New York	+
2	USA	+
3	Ontario	+
4	Toronto	+
5	British Columbia	+



Harmony supports multi-tiered locations. If you'd like to create a sub-location, click the “+” button on the preceding (parent) location instead.

3. Enter the required fields.

Field Name	Description
<u>“Code”</u>	Unique ID for the location, such as a short name.
<u>“Name”</u>	The name of the location.
<u>“Description”</u>	An optional field to provide more information about the location.

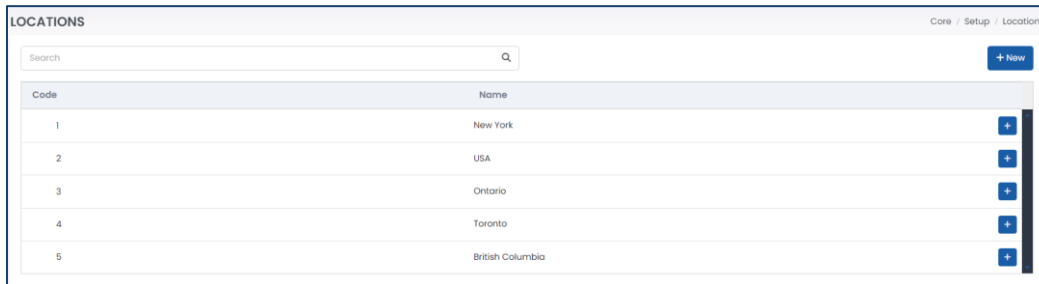


Code	1
Name	New York
Description	

4. Click the save button to save your changes.

5.6.2 Editing a Location

1. From the list of locations, select the location you want to edit.



Code	Name
1	New York
2	USA
3	Ontario
4	Toronto
5	British Columbia

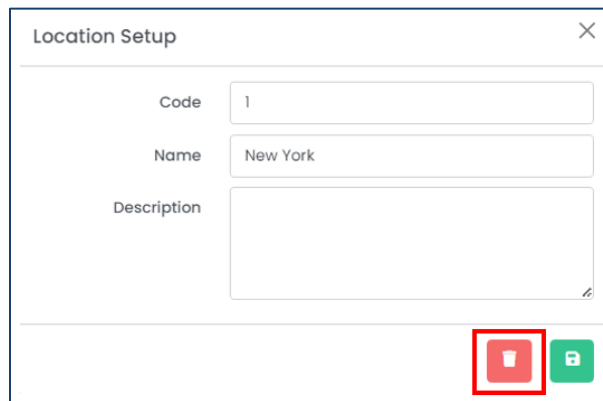
2. Edit the fields as required.
3. Click the save button to save your changes.

5.6.3 Deleting a Location



If the location is already assigned to an employee, you cannot delete the location. You must assign the employee(s) to another location before attempting to delete it.

1. From the list of locations, select the location you want to delete.
2. Click the delete button to delete the location.



Location Setup

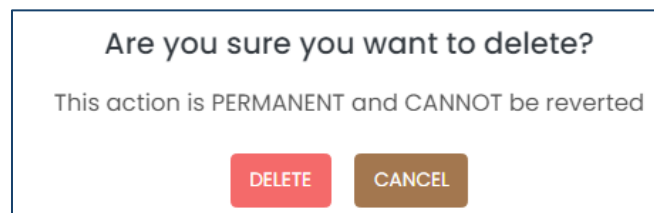
Code: 1

Name: New York

Description:

DELETE (highlighted) SAVE

3. Harmony will ask for your confirmation that you want to delete the location. Click **“Delete”** to delete the location. The location is now deleted.



Are you sure you want to delete?

This action is PERMANENT and CANNOT be reverted

DELETE CANCEL



If you accidentally deleted a location, you can re-create the location manually.

5.7 Pay Codes

Pay codes are the links to Payroll from the other modules. You can import or set these up to assign to particular sections of each module, such as projects/tasks, time off types, benefits, and more.

5.7.1 Creating a Pay Code

1. Navigate to Setup > Pay Codes.
2. Click “+ New” to create a new pay code.

The screenshot shows the 'PAY CODES' interface. At the top right, the breadcrumb 'Core / Setup / Pay Codes' is visible. Below the breadcrumb is a search bar and two buttons: 'Import' and 'Fetch'. A red box highlights the '+ New' button in the top right corner. The main area contains a table with columns 'Code', 'Name', and 'Description'. The table lists several pay codes: 099 (Mileage), 101 (Salary), 102 (Hourly wages), 102A (Warehouse Work), 103 (Overtime 1.5), and 104 (Overtime 2).

3. Enter the required fields.

Field Name	Description
<u>“Code”</u>	Unique ID for the pay code, such as a short name.
<u>“Name”</u>	The name of the pay code.
<u>“Description”</u>	An optional field to provide more information about the pay code.

The screenshot shows the form for creating a new pay code. It has three input fields: 'Code' with the value '102', 'Name' with the value 'Hourly wages', and 'Description' which is currently empty. There is a small edit icon in the bottom right corner of the description field.

4. Click the save button to save your changes.
5. Repeat steps 2 through 4 for each pay code.



Harmony includes a “Fetch” option in which the system will fetch your existing pay codes (payroll categories) from the Payroll module.

5.7.2 Editing a Pay Code

1. From the list of pay codes, select the pay code you want to edit.
2. Edit the pay code as required.
3. Click the save button to save your changes.

5.7.3 Deleting a Pay Code





If the pay code is already assigned to an item in any module, you cannot delete it. You must assign the item to a different pay code before attempting to delete it. You will also not be able to delete a pay code that was fetched from the Payroll module.

1. From the list of pay codes, select the pay code you want to delete.
2. Click the delete button to delete the pay code.

Pay Code Setup

Code	102
Name	Hourly wages
Description	

3. Harmony will ask for your confirmation that you want to delete the pay code. Click **“Delete”** to delete the pay code. The pay code is now deleted.

Are you sure you want to delete this pay code?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



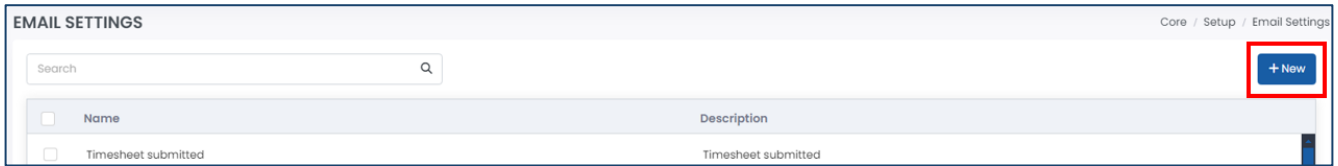
If you accidentally deleted a pay code, you can re-create the pay code manually.

5.8 Email Templates

Your email templates are used to send email notifications when certain events are triggered in Harmony. For example, when your employees request time off, you can receive an email notifying you to log in and approve or reject the time off request.

5.8.1 Creating an Email Template

1. Navigate to Setup > Email Settings.
2. Click **“+ New”** to create a new email template.



3. Enter the required fields.

Field Name	Description
<u>“Name”</u>	The name of the email template.
<u>“Description”</u>	An optional field describing the email template.
<u>“Subject”</u>	The subject of the email that you will receive for the notification.
<u>“Body”</u>	The body of the email that you will receive for the notification.

Email Template Setup

Name
Description

Subject

Placeholders

All Announcement Approver Clock Entry Competency Group

Date Time Document Employee Employee Shift Goal

Off Boarding On Boarding Performance Appraisal Recipient

Time Off Timesheets Training User

Announcement

Approver

Clock Entry

Competency Group

Date Time

Body

B I U **Quote** **Code** **H1 H2** **List** **Link** **Text** **Color** **Background** **Font**

Normal Sans Serif

Dear ,

Welcome to ABC Company! We're excited for you to join our team. Before your first day, please click the link below to complete your profile.

Kindly,
ABC Company

4. For the *“Body”* of the email, you can use the dynamic placeholders to personalize the message. These placeholders will be replaced when the email notification is emailed. You can also use the available formatting tools to customize your message, such as bold, italics, fonts, and more.

Placeholder Name	Description
Announcement Name	The title of the announcement made in the HR module.
Announcement Body/Text	The body of the announcement made in the HR module.
Announcement Post Date	The date that the announcement was posted in the HR module.
Approver First Name	The first name or given name of the approver.
Approver Last Name	The last name, surname, or family name of the approver.
Clock In Time	The time that the employee clocked in, from the T&A module.
Clock Out Time	The time that the employee clocked out, from the T&A module.
Clock Entry Duration	The duration of time the employee clocked in for, from the T&A module.
Competency Group Name	The name of the competency group from the HR module.
Current Date	The current date of which the email is sent.
Current Time	The current time of which the email is sent.
Employee First Name	The first name or given name of the employee.
Employee Last Name	The last name, surname, or family name of the employee.
Employee Home Department	The department that the employee is assigned to.
Employee Home Location	The location that the employee is assigned to.
Employee Work Permit Expiry Date	The expiry date of the employee’s work permit, as defined in the HR module.
Employee Contract End Date	The end date of the employee’s contract, as defined in the HR module.
Employee Probation End Date	The end date of the employee’s probationary period, as defined in the HR module.
Employee Professional Membership Renewal Date	The date of which an employee’s professional membership must be renewed, as defined in the HR module.
Employee Professional Membership Organization	The organization that provides the professional membership of which the employee is a part of, as defined in the HR module.
Employee Professional Membership Type	The type of professional membership that the employee is a part of, as defined in the HR module.
Employee Professional Membership Designation Name	The name or designation of the professional membership that the employee is a part of, as defined in the HR module.
Employee Profile Section	The section of the employee profile, as per the HR module.
Employee Shift Code	The code of the shift of which the employee works, as defined in the T&A module.
Employee Shift Name	The name of the shift of which the employee works, as defined in the T&A module.
Goal Name	The name of the goal, as defined in the HR module.
Goal Creation Date	The date of which the goal was created, as defined in the HR module.
Goal Expiry Date	The expiry date of the goal, as defined in the HR module.
Goal Progress	The percentage of progress made on a goal, as defined in the HR module.
Offboarding Checklist Item Name	The name of the offboarding checklist item, as defined in the HR module.
Offboarding Checklist Item Expiry Date	The date of which an offboarding checklist item must be completed by, as defined in the HR module.
Onboarding Link	The link that new hires will receive when onboarded, as defined in the HR module.

Onboarding Employee Name	The name of the new hire, as defined in the HR module.
Performance Review Name	The name of the performance review, as per the HR module.
Performance Review Instructions	The instructions provided in the performance review, as per the HR module.
Performance Review Start Date	The date of which a performance review begins, as per the HR module.
Recipient First Name	The first name or given name of the person receiving the email notification.
Recipient Last Name	The last name, surname, or family name of the person receiving the email notification.
Time Off Request Date Range	The date range of the time off request, as per the T&A or HR modules.
Time Off Request Time Ranger	The time range of the time off request, as per the T&A or HR modules.
Time Off Type of Request	The name of the time off type requested, as per the T&A or HR modules.
Timesheet Date Range	The date range of the timesheet, as per the T&A module.
Timesheet Total Hours	The total hours worked in the timesheet, as per the T&A module.
Timesheet Total Regular Hours	The total hours of regular time worked in the timesheet, as per the T&A module.
Timesheet Total Overtime Hours	The total hours of overtime worked in the timesheet, as per the T&A module.
Timesheet Total Time Off Hours	The total hours of time off taken in the timesheet, as per the T&A module.
Timesheet Total Weekly Hours	The total hours worked per working week in the timesheet, as per the T&A module.
Timesheet Total Weekly Regular Hours	The total hours of regular time worked per working week in the timesheet, as per the T&A module.
Timesheet Total Weekly Overtime Hours	The total hours of overtime worked per working week in the timesheet, as per the T&A module.
Timesheet Total Weekly Time Off Hours	The total hours of time off taken per working week in the timesheet, as per the T&A module.
Training Event Name	The name of the training event, as per the HR module.
Training Event Start Date	The start date of the training event, as per the HR module.
Training Event End Date	The end date of the training event, as per the HR module.
Training Event Trainer	The trainer for the training event, as per the HR module.
Training Event Room	The room or location for the training event, as per the HR module.
Training Event Instructions	The instructions set for the training event, as per the HR module.
User Name	The username of the user (email address used to log into Harmony).
Password	The password of the user that is used to log into Harmony.
Company	The company of which the user has access to in Harmony.

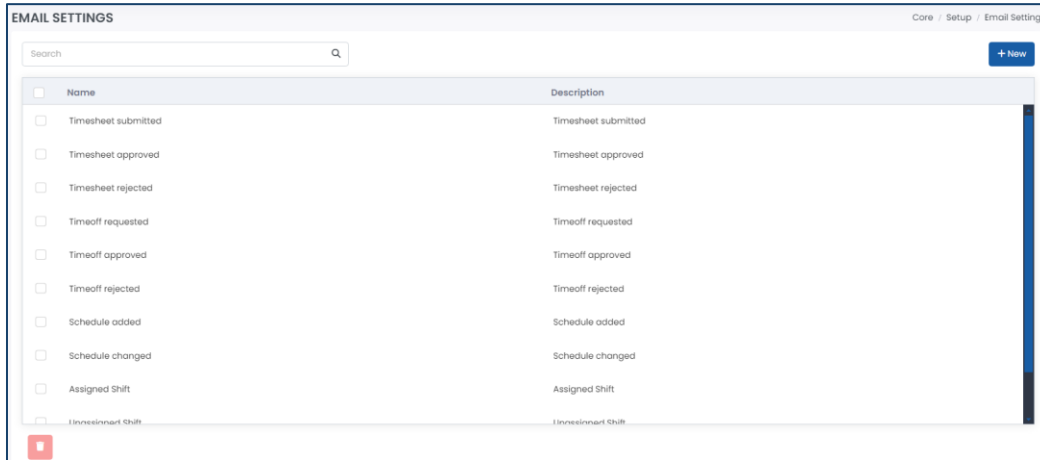
5. Click the save button to save your changes.



After you've created all your email templates, you will need to assign them to the corresponding notification in each module that you've purchased. You can do this by navigating to the module and going to Setup > Notifications.

5.8.2 Editing an Email Template

1. From the list of email templates, select the template you want to edit.



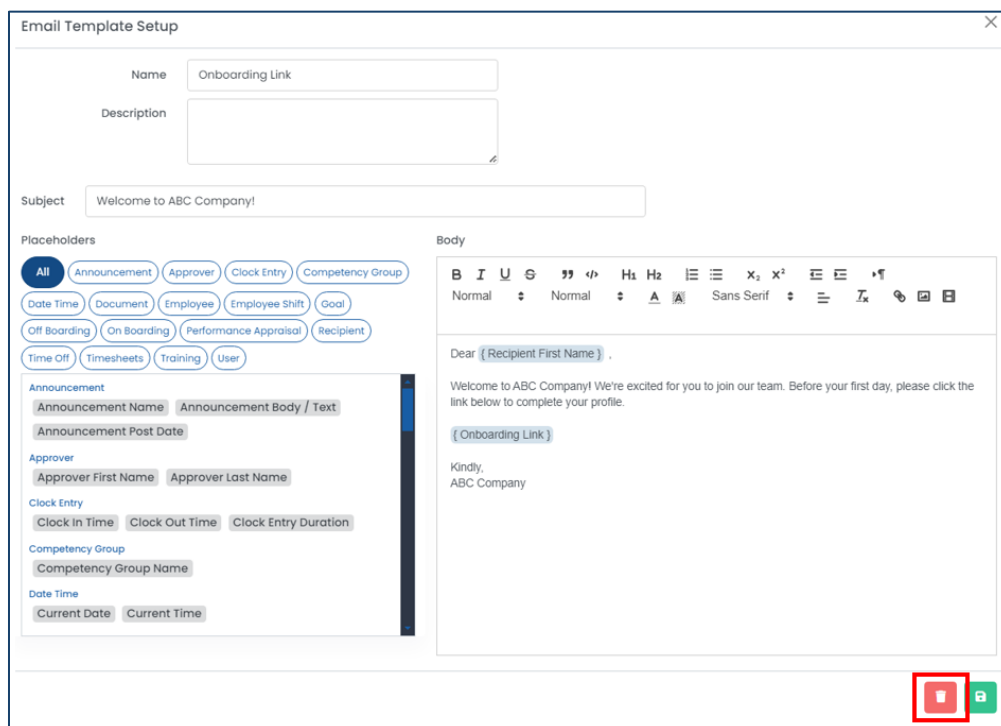
2. Edit the fields as required.
3. Click the save button to save your changes.

5.8.3 Deleting an Email Template



If the email template is already assigned to a notification in any module, you cannot delete it. You must assign the notification to a different email template before attempting to delete it.

1. From the list of email templates, select the email templates you want to delete.
2. Click the delete button to delete the email template.



-
3. Harmony will ask for your confirmation that you want to delete the email template. Click **“Delete”** to delete the email template. The email template is now deleted.

Are you sure you want to delete this Email Template(s)?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



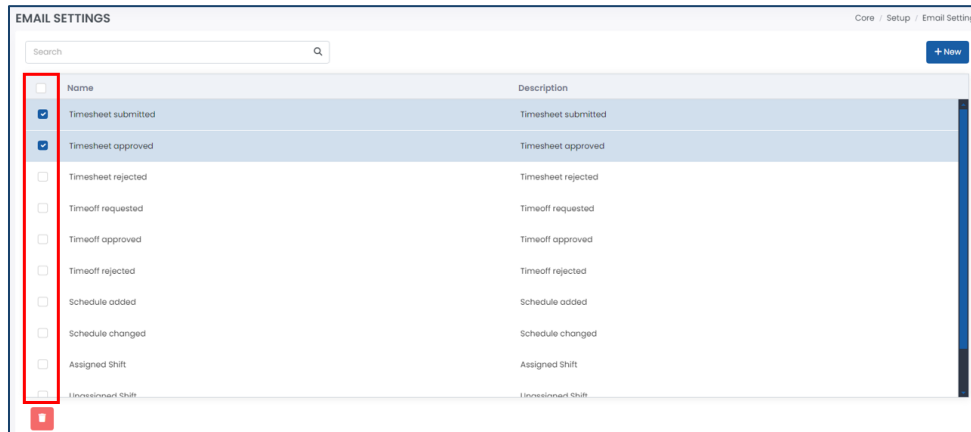
If you accidentally deleted an email template, you can re-create it manually.

5.8.4 Mass-Deleting Email Templates

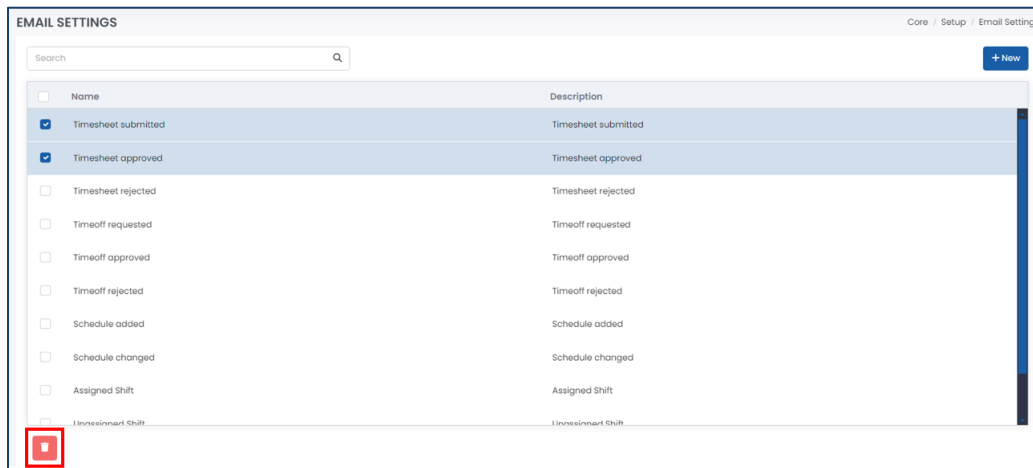


If the email template is already assigned to a notification in any module, you cannot delete it. You must assign the notification to a different email template before attempting to delete it.

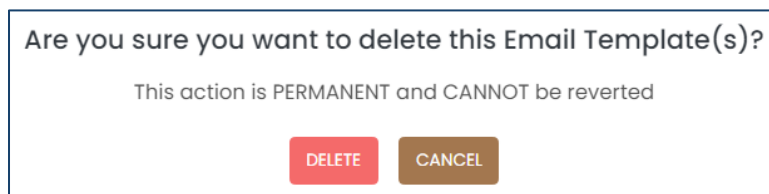
1. From the list of email templates, use the checkboxes to select the email templates you want to delete.



2. Click the delete button to delete the selected email templates.



3. Harmony will ask for your confirmation that you want to delete the selected email templates. Click **“Delete”** to delete the email templates. The email templates are now deleted.



If you accidentally deleted an email template, you can re-create it manually.

5.9 Custom Groups

Custom groups are used to group your employees if they cannot be grouped by other fields in Harmony. For example, employees can be grouped by their departments, but you use custom groups to group all your department managers together. This will be used to identify your approval paths later on.

5.9.1 Creating a Custom Group

1. Navigate to Approval Path > Custom Groups.
2. Click the “+ New” button to create a new custom group.
3. Enter the required fields.

Field Name	Description
<u>“Code”</u>	Unique ID for the custom group, such as a short name.
<u>“Name”</u>	The name of the custom group.
<u>“Description”</u>	An optional field to provide more information about the custom group.

4. In the *Employees* section, you can use the filters and/or search bar to search for a particular employee. Click the checkbox of the employee on the left side and click the “→” button to move them into this custom group. To remove an employee from this group, you can select the employee on the right side and click the “←” button instead.



Employees can only belong to one custom group at a time. If an employee already belongs to a custom group, Harmony will indicate this in the list of employees. Moving them to the current group will automatically remove them from their previous group.

5. Click the save button to save your changes.

5.9.2 Editing a Custom Group

1. From the list of custom groups, select the group you want to edit.

CUSTOM GROUPS					Core / Approval Path / Custom Groups
Search					+ New
<input type="checkbox"/>	Code	Name	Members	Description	
<input type="checkbox"/>	100	Department Managers	2		

2. Edit the fields as required.
3. Click the save button to save your changes.

5.9.3 Deleting a Custom Group



If an employee is already assigned to a custom group, you cannot delete it. You must assign the employee to a different custom group before attempting to delete it.

4. From the list of custom groups, select the group you want to delete.
5. Click the delete button to delete the custom group.

Custom Group Setup

Code: 100 Name: Department Managers

Description:

Employees

Select Location: Select Department: Search...

Add an employee (0/4)

- 22 - Scott, Michael
- 28 - Schrute, Dwight
- 3 - Hannon, Kelly
- 43 - Halpert, James

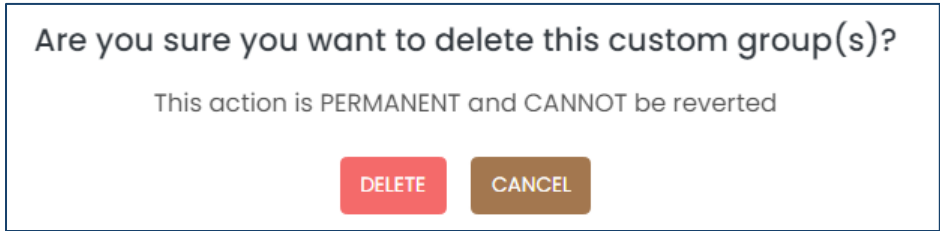
Currently in this group (0/2)

- 1 - Beesly, Pamela
- 2 - Martin, Angela

Navigation: ← →

Buttons: [Delete] [Save]

-
6. Harmony will ask for your confirmation that you want to delete the custom group. Click **“Delete”** to delete the custom group. The custom group is now deleted.



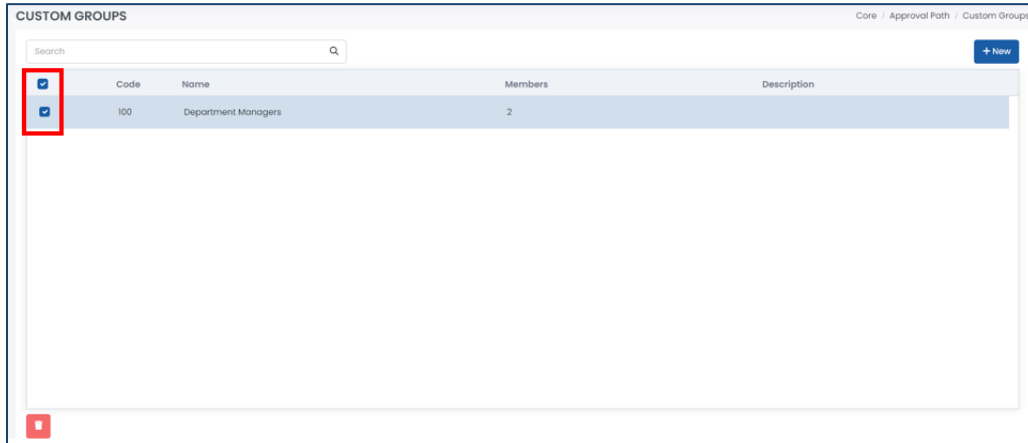
If you accidentally deleted a custom group, you can re-create it manually.

5.9.4 Mass-Deleting Custom Groups

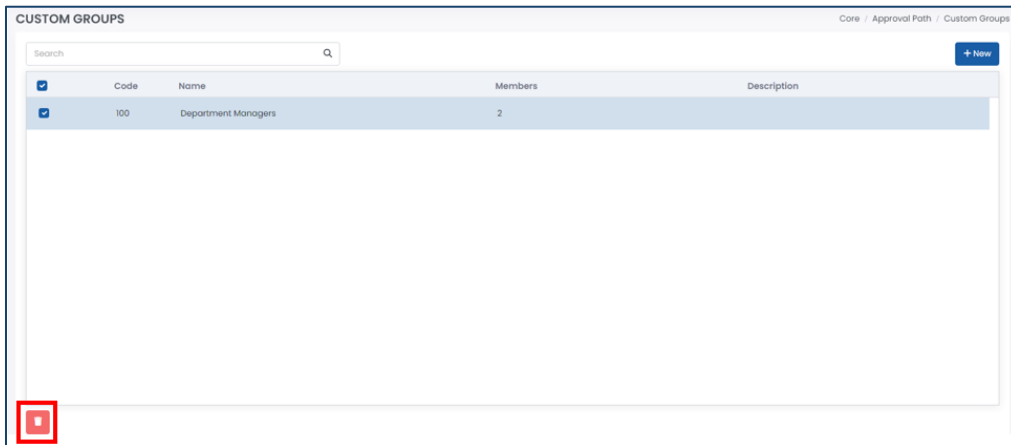


If an employee is already assigned to a custom group, you cannot delete it. You must assign the employee to a different custom group before attempting to delete it.

1. From the list of custom groups, use the checkboxes to select the custom groups you want to delete.



2. Click the delete button to delete the selected custom groups.



3. Harmony will ask for your confirmation that you want to delete the selected custom groups. Click **“Delete”** to delete the custom groups. The custom groups are now deleted.

Are you sure you want to delete this custom group(s)?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



If you accidentally deleted a custom group, you can re-create it manually.

5.10 Approval Paths

Approval paths are used to identify who oversees approving items in each module, such as timesheet, benefit enrollments, and time off requests. Multiple approval paths can be set for different departments, locations, shifts, or personnel.



Items requiring approval will remain with the same approval path at the time that the item was requested or submitted. If employees change approval paths, it will not affect items that were already submitted or approved. The item must be rejected or cancelled for the new approval path to take effect.

5.10.1 Creating an Approval Path

1. Navigate to Approval Path > Approval Path.
2. Click the “+ New” button to create a new approval path.

3. Enter the required fields.

Field Name	Description
<u>“Code”</u>	Unique ID for the approval path, such as a short name.
<u>“Name”</u>	The name of the approval path.
<u>“Description”</u>	An optional field to provide more information about the approval path.
<u>“Module Components”</u>	The sections of each module for which this approval path will apply to. You may select more than one if applicable.

4. In the *Approval Sequence* section, this is where you will identify the approvers for this approval path. They will be approvers of the module components that you selected earlier. If you want to send reminders if no action has been taken once a request has been submitted, you can use the checkbox and enter the number of hours. The reminders will be sent to whoever is in the dropdown in the grid below.
5. Click the “+” button to add a new approval sequence.

Approval Sequence

Send reminder if request for approval has not been approved/rejected after hours

Sequence	Approver 1	Approver 2	Reminder
<input type="text" value="1"/>	22 - Scott, Michael <input type="checkbox"/>	<input checked="" type="checkbox"/> Select Option.. <input type="checkbox"/>	22 - Scott, Michael <input type="checkbox"/>

6. Select/enter the required fields.

Field Name	Description
<u>"Sequence"</u>	The sequence of which the approvers will approve the request. If you have more than one sequence, then at least one approver of each sequence must approve the request before it can be moved onto the next sequence of approvers.
<u>"Approver 1"</u>	The first approver of the sequence.
<u>"Approver 2"</u>	The second approver of the sequence.
<u>"Reminder"</u>	The user of which the reminders will go to, related to step #4 above.



There are toggles for each approver in each sequence. Ensure that you toggle this on to activate the approver for the sequence, to allow them to be the approver. If this is not toggled on (deactivated), then the approver will not be able to approve the request. If both approvers are active, then either one of the approvers may approve the request in order for it to move onto the next sequence.

Approval Sequence

Send reminder if request for approval has not been approved/rejected after hours

Sequence	Approver 1	Approver 2	Reminder
<input type="text" value="1"/>	22 - Scott, Michael <input type="checkbox"/>	<input checked="" type="checkbox"/> Select Option.. <input type="checkbox"/>	22 - Scott, Michael <input type="checkbox"/>

7. In the *Approval Criteria* section, this is where you will identify to whom this approval path will apply to. For example, if this approval path is only applicable to those in a particular location or department, or if it's applicable to a specific person, this can be identified in this area. There will already be one criterion that you enter, but you may add additional ones if required.

8. Enter the required fields.

Field Name	Description
<u>"Criterion"</u>	The name of the criteria of which will apply to this approval path. Available selections include: <ul style="list-style-type: none"> • Main Shift – The shift of which the employee is assigned to, as per the T&A module. • Worked Shift – The shift of which the employee works (only applicable if the employee is assigned to more than one shift), as per the T&A module. • Location – The location of which the employee is assigned to. • Department – The department of which the employee is assigned to. • Employee ID – A specific employee.

	<ul style="list-style-type: none"> • Timesheet Period – The timesheet period of which the employee is assigned to, as per the T&A module. • Custom Group – The custom group of which the employee is assigned to, if any.
<u>“Selection”</u>	The selection according to the criterion that you selected. For example, if you selected “Department” as your criterion, a list of all your departments will appear for you to select.



There are toggles for each approver in each sequence. Ensure that you toggle this on to activate the approver for the sequence, to allow them to be the approver. If this is not toggled on (deactivated), then the approver will not be able to approve the request. If both approvers are active, then either one of the approvers may approve the request in order for it to move onto the next sequence.

Approval Criteria

1. ⊖ Department × 1 - Administrator ×

2. ⊖ Location × 1 - New York ×

[+ Add Criteria](#)

Criteria Pattern: 1. Department **OR** 2. Location ⓘ TEST

9. Click the “+ Add Criteria” button to add new criterion for the approval path.

Approval Criteria

1. ⊖ Department × 1 - Administrator ×

2. ⊖ Location × 1 - New York ×

[+ Add Criteria](#)

Criteria Pattern: 1. Department **OR** 2. Location ⓘ TEST

10. If you’ve entered more than one criterion for the approval path, click the edit button to edit the criteria pattern.

Approval Criteria

1. ⊖ Department × 1 - Administrator ×

2. ⊖ Location × 1 - New York ×

[+ Add Criteria](#)

Criteria Pattern: 1. Department **OR** 2. Location ⓘ TEST

11. Use the tiles available to drag and drop your criteria pattern, similar to a mathematical expression.

Available Tiles	Description
<u>“AND”</u>	Provides a pattern of an ‘and’ scenario. For example, if you have the criteria pattern: Department AND Location, then this means that the employee must be assigned to <u>both</u> that

	particular department <u>and</u> that particular location. Employees of the selected department but of a different location will not apply, and vice versa.
<u>“OR”</u>	Provides a pattern of an ‘or’ scenario. For example, if you have the criteria pattern: Department OR Location, then this means that the employee must be either assigned to that particular department <u>or</u> that particular location – but not both.
<u>“(,)”</u>	Open and end parentheses, otherwise known as brackets. Use this option when you want to use this part of the criteria pattern first. For example, if you have the criteria pattern: (Department AND Location) OR Employee ID, then this means that the employee must be assigned to both that particular department and location, but there is an exception – if that employee is the selected employee of that third criterion.

Criteria Pattern

Drag and drop the available tiles to create your criteria pattern.

1. Department
OR
2. Location

Available Tiles: () AND OR

12. Click the **“TEST”** button to test your criteria and criteria pattern for the approval path.



Keep in mind that approval paths are ordered in a particular order (most specific to least specific, as per step #13 below), so even if the correct employees appear when you are testing the approval path, it is important to make sure that they are ordered correctly. You can double-check this by navigating to Approval Path > Assigned Approval Paths later.

Approval Criteria

1. Department x 1 - Administrator x

2. Location x 1 - New York x

+ Add Criteria

Criteria Pattern: 1. Department OR 2. Location TEST

13. Click the save button to save your changes.

14. In the list of all approval paths, these must be ordered in a particular order. The most specific approval paths should appear at the top of the list, while the most generic approval paths should appear at the bottom of the list. You can use the menu button to reorder the list as required. Generally, the order of the approval paths (according to the criteria selected) should be: Employee ID, Custom Group, Worked Shift, Main Shift, Timesheet Period, Department, Location.



The system provides a default approval path for you as a catch-all for any requests that do not apply to any of your approval paths. This default approval path will not have any criteria, and is strongly recommended to be at the bottom of your list of approval paths.

APPROVAL PATH Core / Approval Path / Approval Path

Search

Code	Name	Assigned Criteria	Filter Values
100	Administrator	Department, Location	
DEFAULT	Default		

- Navigate to Approval Path > Assigned Approval Paths to double-check if your employees are assigned to the correct approval paths. You can use the filter/parameters at the top of the page to search for an employee or select the module component for the approval path.

ASSIGNED APPROVAL PATHS Core / Approval Path / Assigned Approval Paths

Select Employee

Id	Name	Active Approval Path
1	Pamela Beesly	Administrator
2	Angela Martin	Default
22	Michael Scott	Default
28	Dwight Schrute	Default
3	Kelly Hannon	Default
43	James Halpert	Administrator

5.10.2 Editing an Approval Path



Items requiring approval will remain with the same approval path at the time that the item was requested or submitted. If employees change approval paths because you modified any criteria or approvers, it will not affect items that were already submitted or approved. The item must be rejected or cancelled for the new approval path to take effect.

- From the list of approval paths, select the approval path you want to edit.

APPROVAL PATH Core / Approval Path / Approval Path

Search

Code	Name	Assigned Criteria	Filter Values
100	Administrator	Department, Location	
DEFAULT	Default		

- Edit the approval path as required.
- Click the save button to save your changes.

5.10.3 Deleting an Approval Path



If the approval path is already assigned to an employee, you cannot delete it. You must assign the employee to a different approval path before attempting to delete it.

1. From the list of approval paths, select the approval path you want to delete.
2. Click the delete button to delete the approval path.

3. Harmony will ask for your confirmation that you want to delete the approval path. Click **“Delete”** to delete the approval path. The approval path is now deleted.



If you accidentally deleted an approval path, you can re-create it manually.

5.11 Company Backup & Restore

While Harmony is a cloud-based solution, you have the ability to create a manual restore point at any time. This should be done frequently to have multiple restore points in the system in case information is entered incorrectly, and you would like to reverse it.



Each Harmony account, by default, is limited to 1 GB of backup space. If you require additional space, feel free to delete any old backups that you will not use any longer, or contact the Paymate team to purchase additional space.

1. Navigate to Tools > Backup/Restore.
2. Enter the “Back Up File Name”. A default one will already be provided for you.
3. Click **“Back Up”** to back up your data.

The screenshot shows the "BACKUP / RESTORE" interface. At the top right, there is a breadcrumb trail: "Core / Tools / Backup / Restore". Below this, there is a "Back Up File Name:" label followed by a text input field containing "Harmony Backup - 3-4-2024-12-15-29PM". To the right of the input field is a blue "Back Up" button, which is highlighted with a red rectangular box. Below the input field, there is a blue informational box that reads: "This back up function will back up all data of the current company database. This means you will be backing up all setup information, employee information and paycard information". To the right of the input field, there is a "Storage Usage" section with a gauge showing "0%" and "144.36 MB / 1GB Used".

4. Your backup file will be shown in the table. Click the restore button to restore a backup if required.



It is strongly recommended that you make a backup prior to restoring a backup if you restore the incorrect one. You must also ensure that no one is using the system when you restore a backup, as this will bring your data back in time – thus no information entered after creating the backup will be saved. This means any employees who are currently clocked in may not be clocked in any longer.

5.12 Reset System Cache

As Harmony is a web-based system, resetting your browser and system cache will help clear old data in the event something is not showing or working properly.



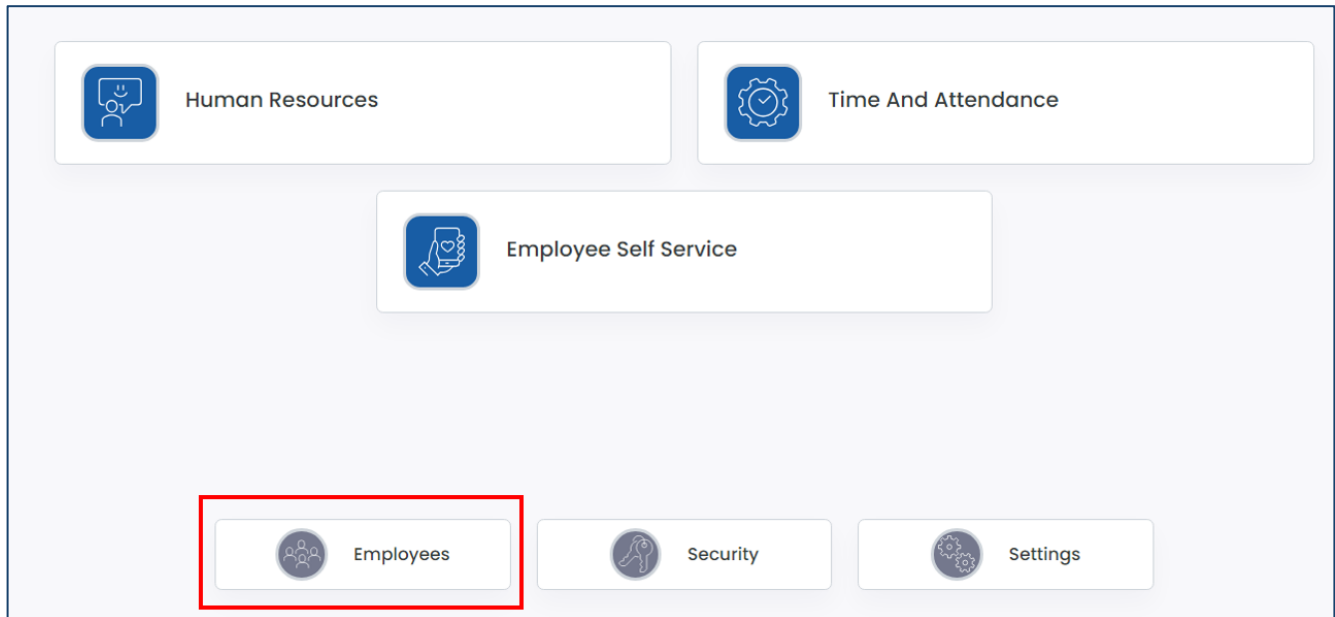
We recommend clearing your system and browser’s cache after there is a new update.

1. Navigate to Tools > System Tools.
2. Click **“Reset System Cache”**.

The screenshot shows the "SYSTEM TOOLS" interface. At the top right, there is a breadcrumb trail: "Core / Tools / System Tools". In the center of the page, there is a blue button labeled "Reset System Cache".

6.0 Employees

All modules of Harmony share a common database – which means your employees, when entered once, will be available in all modules. From the module selection screen, select *Employees*.

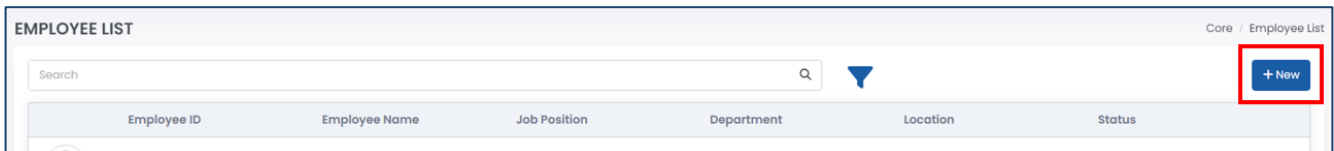


6.1 Employee Types

Your employee types must be set up prior to importing employees or creating your employees. This is a way that you can use to group your employees, similar to Departments and Locations. Common examples include Full-Time, Part-Time, Seasonal, Casual, or others.

6.1.1 Creating an Employee Type

1. Navigate to Employees > Employee List.
2. Click **“+ New”** button to pull up a new employee profile.



3. Beside the field “Employee Type”, click **“View All”** to view all employee types.

4. Click the **“+ New”** button to create a new employee type.

Code	Name
01	Full Time
02	Casual

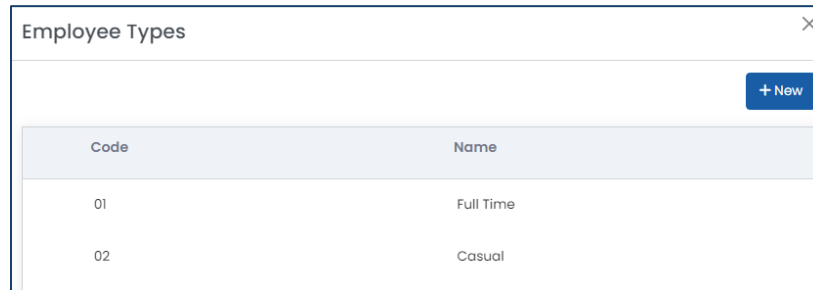
5. Enter the required fields.

Field Name	Description
<u>“Code”</u>	Unique ID for the employee type, such as a short name.
<u>“Name”</u>	The name of the employee type.
<u>“Description”</u>	An optional field to provide more information about the employee type.

6. Click the save button to save your changes.
7. Repeat steps 4 and 5 for each employee type.

6.1.2 Editing an Employee Type

1. From the list of employee types, select the employee type you want to edit.



The screenshot shows a window titled "Employee Types" with a close button (X) in the top right corner. A blue "+ New" button is located in the top right of the table area. The table has two columns: "Code" and "Name".

Code	Name
01	Full Time
02	Casual

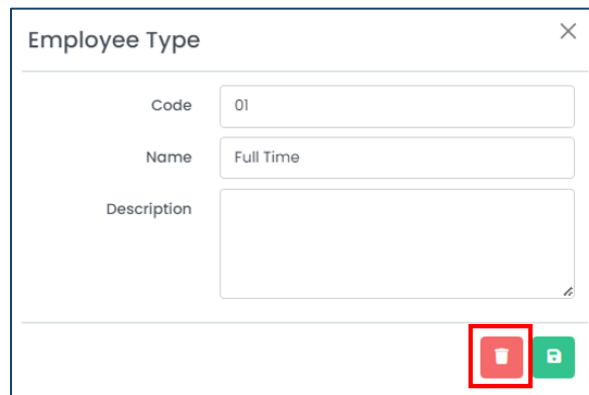
2. Edit the employee type as required.
3. Click the save button to save your changes.

6.1.3 Deleting an Employee Type



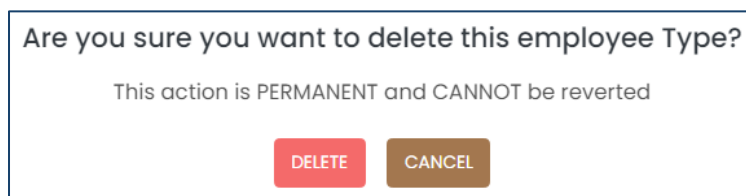
If the employee type is already assigned to an employee, you cannot delete it. You must assign the employee to a different employee type before attempting to delete it.

1. From the list of employee types, select the employee type you want to delete.
2. Click the delete button to delete the employee type.



The screenshot shows a window titled "Employee Type" with a close button (X) in the top right corner. The form contains three input fields: "Code" with the value "01", "Name" with the value "Full Time", and "Description" which is empty. At the bottom right, there are two buttons: a red "Delete" button (highlighted with a red box) and a green "Save" button.

3. Harmony will ask for your confirmation that you want to delete the employee type. Click **"Delete"** to delete the employee type. The employee type is now deleted.



The dialog box has a title "Are you sure you want to delete this employee Type?". Below the title, it says "This action is PERMANENT and CANNOT be reverted". At the bottom, there are two buttons: a red "DELETE" button and a brown "CANCEL" button.

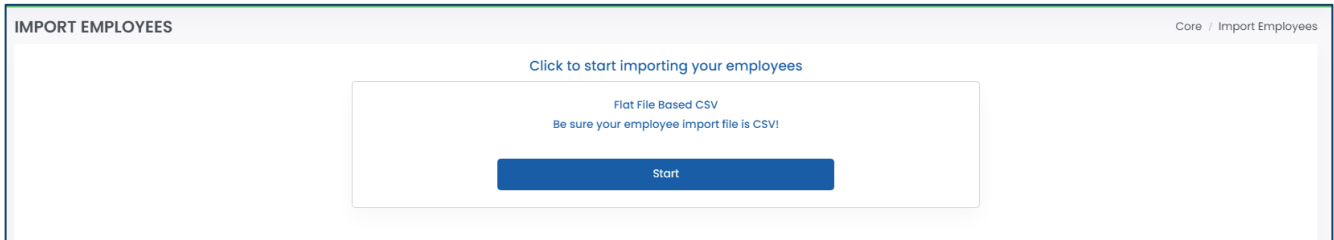


If you accidentally deleted an employee type, you can re-create it manually.

6.2 Importing Employees

Employees can be imported into the system using a comma delimited (CSV) file type. You can either use the predefined import interface that Harmony provides for you, or create your own to fit the export of any system that you are currently using.

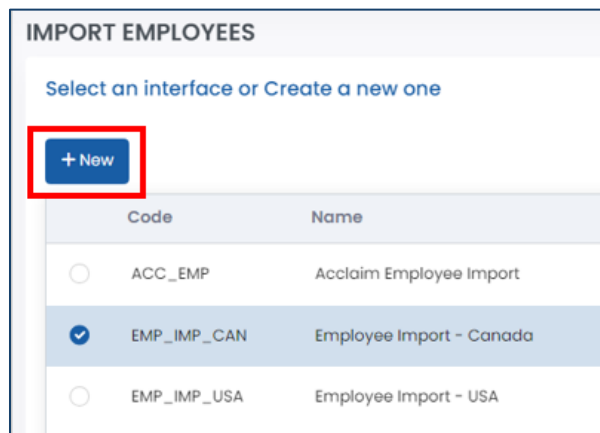
1. Navigate to Employees > Import Employees.
2. Click **“Start”** to begin the importing process.



3. Choose your interface.
 - a. If you want to use the predefined interface, select either the **“EMP_IMP_CAN – Employee Import-Canada”** interface for customers in Canada, or the **“EMP_IMP_USA – Employee Import-USA”** for customers in USA.



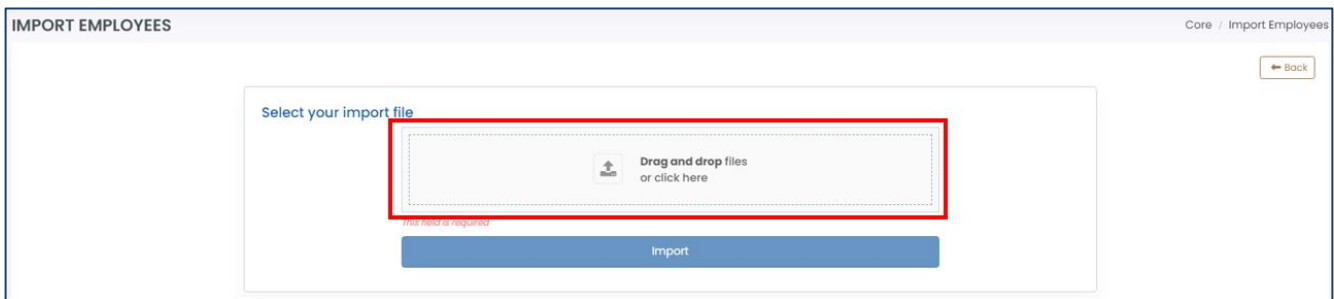
- b. If you want to create your own, click the **“+ New”** button. Go to [6.2.1 Creating a New Employee Import Interface](#) for more information. After creating your new employee interface, select it.



4. Click “Next →” to go to the next step after selecting your interface.



5. Select your file by dragging it from your computer into the allocated box or click the box to browse your computer.



6. Click “Import”.

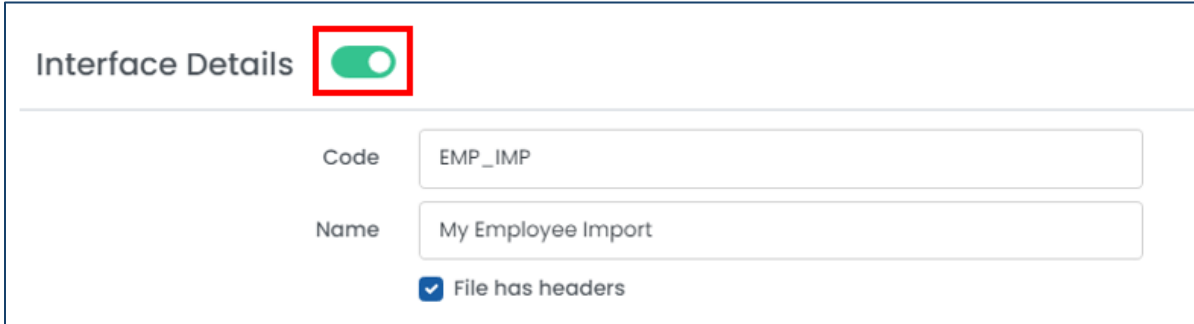


If there is anything wrong with your import file, the system will inform you. Please review and revise your import file and try to import again.

6.2.1 Creating a New Employee Import Interface

This is only required if you are looking to create a new import interface for your employees.

1. Follow steps 1 through 3b from [6.2 Importing Employees](#) if you have not already.
2. Activate the import interface by switching the toggle.



Interface Details

Code

Name

File has headers

3. Enter the required fields.

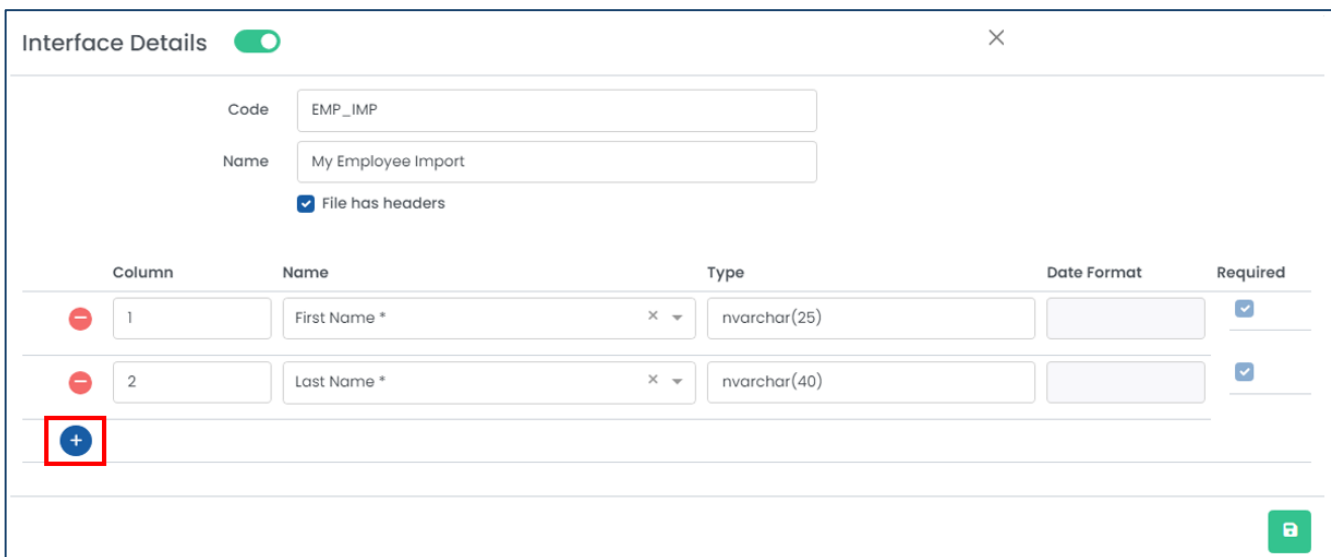
Field Name	Description
<u>"Code"</u>	Unique ID for the employee import interface such as a short name.
<u>"Name"</u>	The name of the employee import interface.

4. Identify if the import file will have headers or not.



If you identify that your file will have headers, then the system will ignore the first row of your file when importing.

5. Click the "+" button to add a new field into the interface.



Interface Details

Code

Name

File has headers

Column	Name	Type	Date Format	Required
<input type="text" value="1"/>	First Name *	<input type="text" value="nvarchar(25)"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input type="text" value="2"/>	Last Name *	<input type="text" value="nvarchar(40)"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="button" value="+"/>				

6. Enter the required fields.



Ensure that all required fields (marked with an asterisk (*)) are selected in your interface.

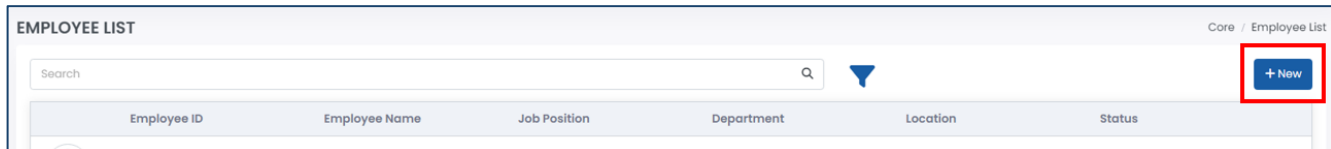
Field Name	Description
<u>"Column"</u>	The column of which this field will be in according to your import file. This should only be a numerical value. For example, entering "1" will mean that this field will be in the first column, such as column A, of your import file.
<u>"Name"</u>	The name of the field of which will be imported.
<u>"Date Format"</u>	For date fields, such as date of birth or start date, you must identify the dater format, such as "MM/DD/YYYY" where "MM" refers to the two-digit month (i.e. "02" for February), "DD" refers to the two-digit date (i.e. "20" for the 20 th of the month), and "YYYY" means the four-digit year (i.e. "2024").

7. Click the save button to save your changes.

6.3 Employee List

You can view your employee list or manually add an employee by going to your *Employee List*.

1. Navigate to Employees > Employee List. Your list of employees will be shown here.
2. To create a new employee, click the **" + New "** button.



3. Enter the fields as required.

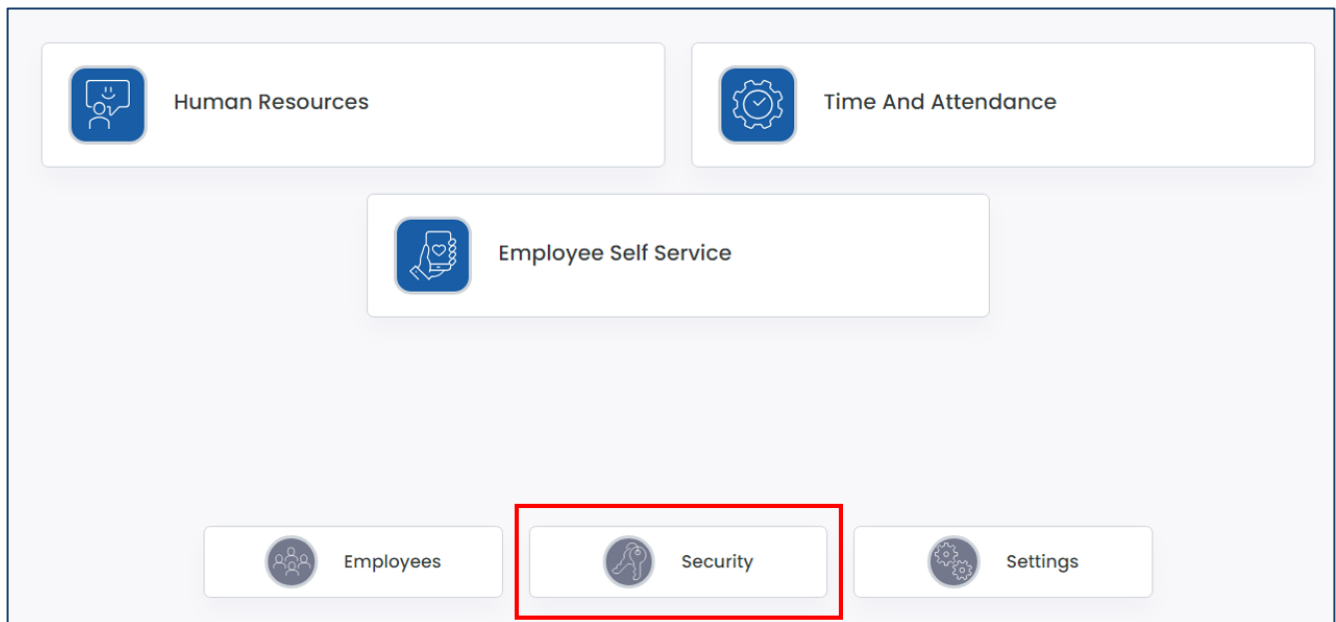
Field Name	Description
<u>"First Name"</u>	The first name, or given name, of the employee.
<u>"Middle Name"</u>	The middle name of the employee.
<u>"Last Name"</u>	The last name, or the family name or surname, of the employee.
<u>"Title"</u>	The title of the employee, if any.
<u>"Gender"</u>	The gender of the employee.
<u>"Pronouns"</u>	The pronouns for the employee.
<u>"Date of Birth"</u>	The date of birth for the employee. You can identify if the date of birth was certified or not.
<u>"Place of Birth"</u>	The place of birth for the employee.
<u>"SIN"</u>	The social insurance number for the employee, for Canadian employees.
<u>"SSN"</u>	The social security number for the employee, for US employees.
<u>"SSN Type"</u>	The type of social security number for the employee, for US employees.
<u>"Marital Status"</u>	The marital status of the employee.
<u>"Home Phone"</u>	The home phone for the employee.
<u>"Cell Phone"</u>	The cell or mobile phone for the employee.
<u>"Personal Email"</u>	The personal email address for the employee.
<u>"Address"</u>	The home address for the employee.

<u>"Country"</u>	The country where the employee resides.
<u>"Province/State"</u>	The province, state, or territory where the employee resides.
<u>"City"</u>	The city or town where the employee resides.
<u>"ZIP/Postal Code"</u>	The ZIP or postal code where the employee resides.
<u>"Employee ID"</u>	The unique employee ID, code, or number for the employee.
<u>"Job Title"</u>	The job title or position of the employee.
<u>"Employment Status"</u>	The employment status of the employee. This will contribute to your active employee license.
<u>"Employee Type"</u>	The employee type for the employee. Review the <i>Employee Types</i> section for more information.
<u>"Start Date"</u>	The date of hire for the employee.
<u>"Termination Date"</u>	The termination date of the employee, if the employment status is inactive or terminated.
<u>"Last Hire Date"</u>	The most recent hire date of the employee, if the employee was rehired.
<u>"Work Phone"</u>	The work phone and extension (if any) of the employee.
<u>"Work Email"</u>	The work email address of the employee.
<u>"Department"</u>	The assigned department of the employee. Review the Departments section for more information.
<u>"Work Location"</u>	The assigned location of the employee. Review the Locations section for more information.
<u>"Supervisor"</u>	The supervisor, or manager, of the employee.
<u>"Alternate Manager"</u>	The alternative supervisor, or manager, of the employee.
<u>"Time Clock UID"</u>	A separate user ID for a time clock, if any.
<u>"Seniority Date"</u>	The seniority date for the employee.
<u>"Is a Manager"</u>	Identifies if the employee is a manager/supervisor or not. This will allow this employee to be selected as another employee's manager.

4. Click the save button to save your changes.

7.0 Security

The *Security* section is where you can provide or prevent access to the system. From the module selection screen, select *Security*.



It is strongly recommended that you do not create user accounts to access Harmony until after go-live of your system. Creating users will automatically send an email to the user with their credentials.

7.1 Security Groups

Your security groups are your groups of users with the same permissions and/or rights. You can have an unlimited number of security groups.



You cannot delete security groups once created. You may only deactivate them to prevent access to the system from users in these security groups.

7.1.1 Creating a Security Group

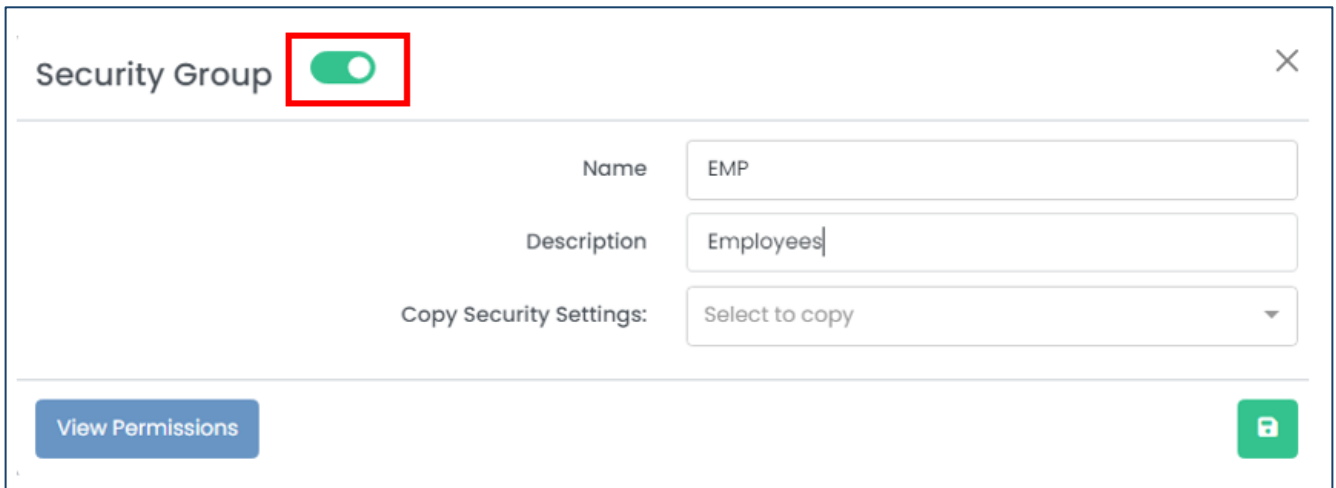
1. Navigate to Security > Groups.
2. Click “+ New” to create a new security group.



3. Activate the security group by using the toggle at the top of the window.



If the security group is inactive, then users assigned to that security group will not be able to access the system.



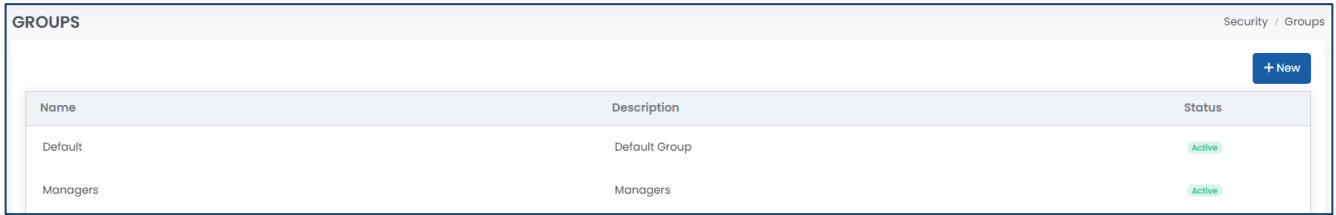
4. Enter the required fields.

Field Name	Description
<u>“Code”</u>	Unique ID for the security group, such as a short name.
<u>“Name”</u>	The name of the security group.
<u>“Copy Security Settings”</u>	An optional field to copy the security settings from another security group.

5. Click the save button to save your changes.

7.1.2 Editing a Security Group

1. From the list of security groups, select the group that you want to edit.



Name	Description	Status
Default	Default Group	Active
Managers	Managers	Active

2. Edit the fields as required.
3. Click the save button to save your changes.

7.2 Permissions

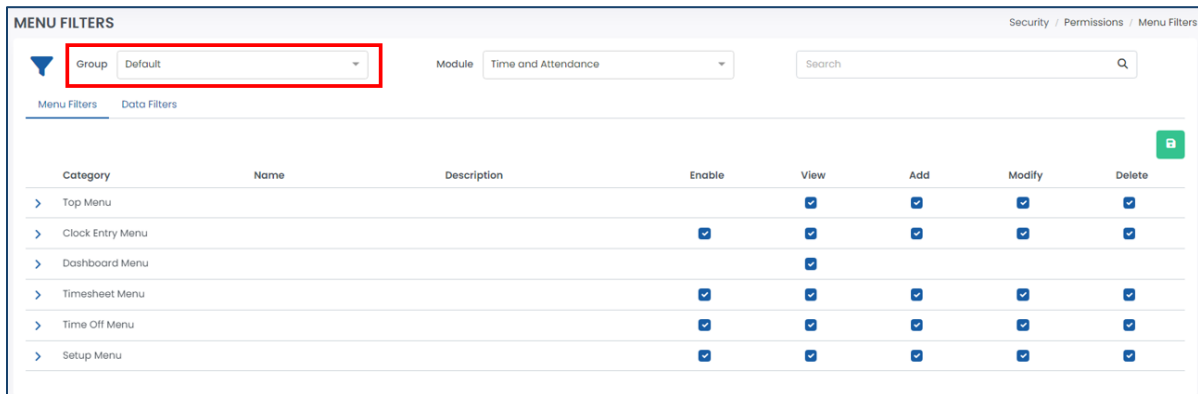
Each security group will have their own unique set of permissions to have limited access to the system.

1. Navigate to Security > Permissions.



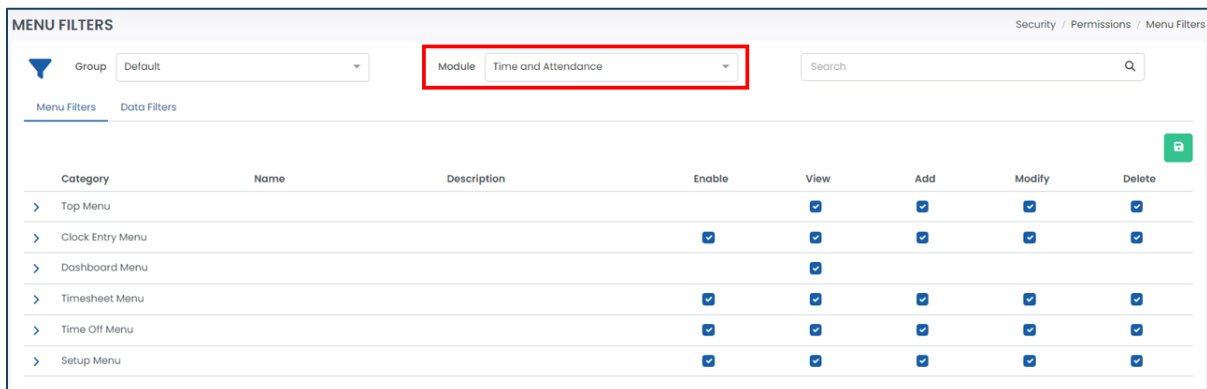
You can also navigate to Security > Groups and select a security group. Then click on **“View Permissions”** to view the permissions for that particular security group. A similar process can be followed for viewing the permissions for a particular user.

2. Select the “Group” filter at the top of the page to select the security group.



Category	Name	Description	Enable	View	Add	Modify	Delete
> Top Menu				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Clock Entry Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Dashboard Menu				<input checked="" type="checkbox"/>			
> Timesheet Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Time Off Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Setup Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

3. Update the permissions as required for each “Module” by using the checkboxes.



Category	Name	Description	Enable	View	Add	Modify	Delete
> Top Menu				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Clock Entry Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Dashboard Menu				<input checked="" type="checkbox"/>			
> Timesheet Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Time Off Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Setup Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Click the save button to save your changes.
- You may also navigate to the **'Data Filters'** section if you want to restrict this security group to only have permissions to access a particular department.

MENU FILTERS

Security / Permissions / Menu Filters

Group: Default Module: Time and Attendance Search

Menu Filters **Data Filters**

Category	Name	Description	Enable	View	Add	Modify	Delete
> Top Menu				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Clock Entry Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Dashboard Menu				<input checked="" type="checkbox"/>			
> Timesheet Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Time Off Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
> Setup Menu			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

7.3 Users

Users are assigned to each security group to have access to the system.



You cannot delete or modify users once created. You may only deactivate them to prevent access to the system.

- Navigate to Security > Users.
- Click **"+ New"** to create a new user.

USERS

Security / Users

Select Department Select Location Select Security Groups Import

Search By Name or Email

+ New Batch Create

Email	Name	Last Login:	Status
-------	------	-------------	--------

- Activate the user by using the toggle at the top of the window.



If the user is inactive, then this user will not be able to access the system.

- Enter the required fields.

Field Name	Description
<u>"User Name"</u>	The user's username, or email address, that they will use to log into Harmony. Ensure that this is a valid email address.
<u>"Password"</u>	The user's password to log into Harmony. Ensure that it meets the minimum requirements: At least nine characters with at least one uppercase letter, one lowercase letter, one number, and one special character.
<u>"Confirm Password"</u>	Re-type the user's password to confirm.

<u>“Force Change Password”</u>	Identifies if you want to force the user to change their password upon their first login. Otherwise, the user will continue to use the password you entered for them until they manually change it.
<u>“Redirect to Module on Login”</u>	Identifies which module that the user will be redirected to upon login. If redirecting to a module, they will bypass the module selection screen.
<u>“Link User to Employee”</u>	Identifies if this user should be linked to an employee profile. This is required if you are using the employee self-service module for this user. If you are not linking an employee to this user, then this user is not an employee and will only have access to view the data in Harmony.
<u>“Security Group”</u>	This user’s assigned security group. Review the Security Groups section for more information.

User Information ✕

User Name:

Password: 👁

Confirm password: 👁

Force change password:

Redirect to this module on login: ✕ ▾

Link this user to an employee: ✕ ▾

Security Group: ✕ ▾

View Permissions 🔒

5. Click the save button to save your changes.



You cannot edit the user once saved. Please ensure that you verify that you are entering the username correctly. If you saved the user with the incorrect email address, please contact Paymate Support immediately to modify. **DO NOT** create a new user with the correct email address.

8.0 Setting Up Harmony T&A

In the following section are the items that you will need to set up for your Time & Attendance module. In each section, the required fields are underlined in red. Any changes made to the setup, which requires a timesheet period to be completed, will be sent to the Change Requests queue. Refer to the *Harmony Company Setup User Manual* for more information.

8.0.1 Pre-Requisites

Aside from the Harmony T&A setup and required setup for your employees, you must have completed the following sections in the configuration of Harmony as well.

- Setup > Preferences > Time Zone
- (optional) Setup > Preferences > Fiscal Year



You will only need to have the fiscal year set up if your time off types will accrue by fiscal year.

- Setup > Settings > Holiday Calendars
- Setup > Settings > Pay Codes
- (optional) Setup > Approval Path > Custom Groups
- Setup > Approval Path > Approval Paths

8.0.2 Recommended Order of Setup



We highly recommend setting up Harmony T&A in the order that we have laid out in the following sections. Not all sections are required for you to use the module but following this order will reduce the time you spend going back and forth between sections.

1. Import & Export Interfaces – only required if you will be importing/exporting data from the system
2. Timesheet Periods
3. Break Types
4. Breaks
5. Overtime Rules
6. Terminal Mode
7. Projects & Tasks
8. Rounding Rules
9. Shifts
10. Time Off Types / Absences / PTO
11. Company Preferences
12. Employee Preferences
13. Notifications

8.1 Import & Export Interfaces


Interfaces allow you to import and export files into and out of Harmony in particular formats. Interfaces can be created for several types, including Timesheets, Clock Entries, and Projects & Tasks. You can only have a maximum of two (2) interfaces per type - one for comma delimited file types (.CSV) and another for fixed length file types (.TXT). To review your interfaces, navigate to Setup > Interfaces.



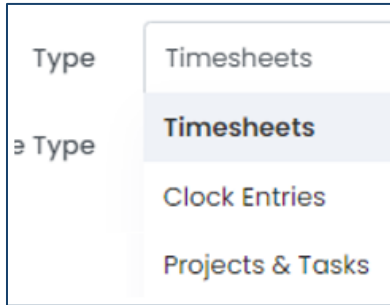
Standard import & export interfaces are already in the system by default. If you are not looking to import or export anything specific from Harmony T&A, you do not need to set up custom interfaces.

8.1.1 Creating an Import or Export Interface

1. Click “+ New” to add a new interface.
2. Enter the required fields.

Field Name	Description
<u>“Code”</u>	A short name for the interface.
<u>“Name”</u>	The name of the interface.
<u>“For”</u>	Identifies if the interface is for importing or exporting data into/from Harmony.
<u>“Type”</u>	Identifies what type of data this interface will import or export.
<u>“File Type”</u>	Identifies the type, either comma delimited (CSV) or fixed length (TXT), of the file.
<u>“Has Header”</u>	If ticked, the import/export file will have a header.  If you have a header in your import file, then Harmony will ignore the first row of data when you import the file.
<u>“Description”</u>	Optional field that describes the interface.

- Depending on the type you selected earlier, there are different fields to select from that can be included in your import or export file. The images below will use the type for timesheets.



- Click the add button to add a row to map a field in the table on the right side of the window. Fields that are required to be in your interface are indicated with an asterisk, so be sure that you include these.

Interface Setup

Code: TS

Name: Timesheets

For: Import Export

Type: Timesheets

File Type: Comma Delimited File Fixed Length File Has header

Description:

Field

- Select Field
- Employee Number *
- + Project/Task Code *
- Activity Code *
- Start Time *
- End Time *
- Timesheet Date *
- Comments *

- Click the save button to save your changes.

Interface Setup

Code: TS

Name: Timesheets

For: Import Export

Type: Timesheets

File Type: Comma Delimited File Fixed Length File Has header

Description:

Field	Source Column
- Employee Number *	1
- Timesheet Date * MM/dd/yyyy	2
- Start Time * hh:mm tt	3
- End Time * hh:mm tt	4
- Worked Hours *	5
- Comments *	6

B

8.1.2 Editing an Import or Export Interface

1. From the list of interfaces, select the interface you want to edit.

Code	Name	Type
ITSTD	Import timesheet Standard	Timesheets
ETSTD	Export timesheet Standard	Timesheets
ICSTD	Import Clock Standard	Clock Entries
ECSTD	Export Clock Standard	Clock Entries

2. Edit the fields as required.
3. Click the save button to save your changes.

8.1.3 Deleting an Import or Export Interface

4. From the list of interfaces, select the interface you want to delete.
5. Click the delete button to delete the interface.

Interface Setup

Code: ITSTD
Name: Import timesheet Standard
For: Import Export
Type: Timesheets
File Type: Comma Delimited File Fixed Length File Has header
Description:

Field | Source Column
- Employee Number * | 1
- Timesheet Date * | 2
MM/dd/yyyy |
- Start Time * | 3
hh:mm tt |
- End Time * | 4
hh:mm tt |
- Worked Hours * | 5
- Project/Task Code * | 6

6. Harmony will ask for your confirmation that you want to delete the interface. Click **“Delete”** to delete the interface. The interface is now deleted.

Are you sure you want to delete this interface?

This action is PERMANENT and CANNOT be reverted

DELETE CANCEL



If you accidentally deleted an interface, you can re-create the interface manually.

8.2 Timesheet Periods

Your timesheet periods refer to the period of which your timesheets are for. Often, this is identical to your pay periods in payroll. You can review your timesheet periods by navigating to Setup > Timesheets.



Setting up your timesheet periods are required for tracking time and creating timesheets.

8.2.1 Creating a Timesheet Period

1. Click “+ New” to create a new timesheet period.

The screenshot shows a table titled 'TIMESHEETS' with columns 'Code', 'Name', and 'Period Type'. A search bar is located at the top right, and a '+ New' button is highlighted with a red box.

2. Enter the required fields.

Field Name	Description
<u>“Code”</u>	A short name for the timesheet period.
<u>“Name”</u>	The name of the timesheet period.
<u>“Period Type”</u>	Identifies the frequency of the timesheet period – either weekly, bi-weekly, semi-monthly, or monthly.
<u>“Day of the Week”</u>	Only required if your period type is weekly. Identifies the first day of each week (e.g. selecting “Monday” means your timesheet periods will run from Monday through Sunday).
<u>“First Timesheet Period End Date”</u>	Only required if your period type is bi-weekly. Identifies the end date of your first timesheet period.
<u>“Initial Days”</u>	Only required if your period type is semi-monthly. Identifies the first date of each period of the month (e.g. selecting “1 st -16 th ” means your timesheet periods will be 1 st -15 th and 16 th until the end of the month).
<u>“Day of the Month”</u>	Only required if your period type is monthly. Identifies the first date of the month (e.g. entering “1” means your timesheet periods will be from the 1 st to the end to the end of the month).

3. Click the save button to save your changes.

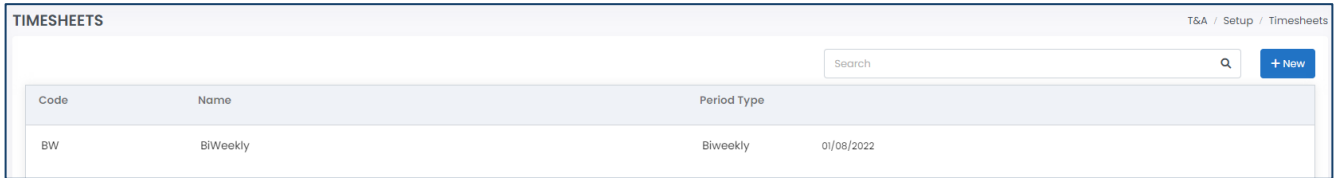
The screenshot shows the 'Timesheet Period Setup' dialog box with the following fields:

- Code: SM
- Name: Semi Monthly
- Period Type: SemiMonthly (dropdown menu)
- Initial Days: 1st - 16th (dropdown menu)

A save button is highlighted with a red box at the bottom right.

8.2.2 Editing a Timesheet Period

1. From the list of timesheet periods, select the timesheet period you want to edit.

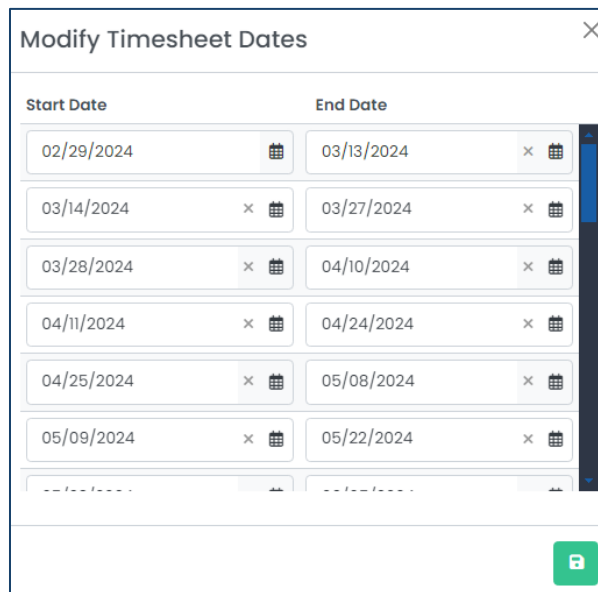


Code	Name	Period Type
BW	BiWeekly	Biweekly 01/08/2022

2. Edit the fields as required. You may click the **“Modify Dates”** button to manually modify the dates if required.



If you are manually modifying dates for your timesheet period, you will not be allowed to have timesheet periods that overlap one another.



Start Date	End Date
02/29/2024	03/13/2024
03/14/2024	03/27/2024
03/28/2024	04/10/2024
04/11/2024	04/24/2024
04/25/2024	05/08/2024
05/09/2024	05/22/2024

3. Click the save button to save your changes.

8.2.3 Deleting a Timesheet Period



If the timesheet period is already assigned to an employee, you cannot delete the timesheet period. You must assign the employee(s) to another timesheet period before attempting to delete it.

1. From the list of timesheet periods, select the timesheet period you want to delete.
2. Click the delete button to delete the timesheet period.

Timesheet Period Setup

Code	<input type="text" value="BW"/>
Name	<input type="text" value="BiWeekly"/>
Period Type	<input type="text" value="BiWeekly"/> x ▾
First Timesheet Period End Date	<input type="text" value="08/01/2022"/> x 📅

3. Harmony will ask for your confirmation that you want to delete the timesheet period. Click **“Delete”** to delete the timesheet period. The timesheet period is now deleted.

Are you sure you want to delete this timesheet?

This action is PERMANENT and CANNOT be reverted



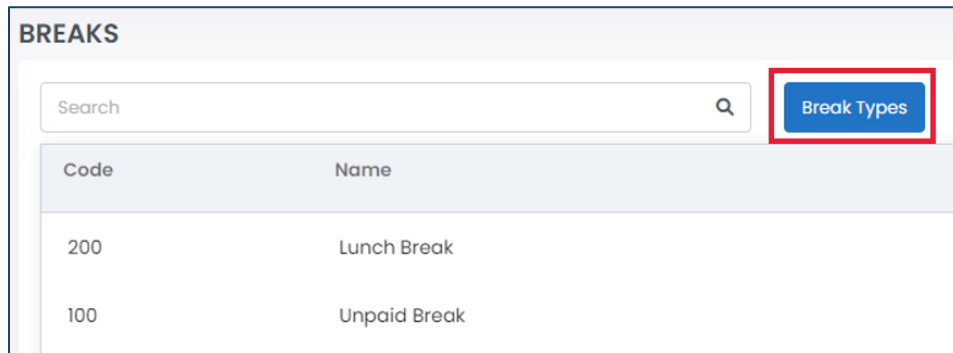
If you accidentally deleted a timesheet period, you can re-create it manually.

8.3 Break Types & Breaks

Different breaks can be set up in Harmony T&A to accommodate different situations. You can choose whether the break is paid or not, and whether it applies to certain shifts. You can also place limitations or restrictions on when your employees can take the break. To review your breaks and break types, navigate to Setup > Breaks.

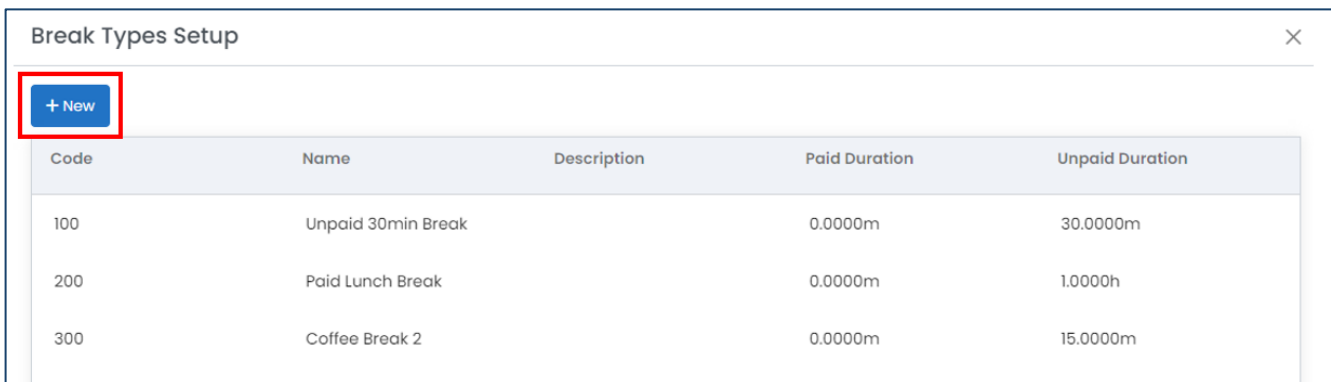
8.3.1 Break Types

Your break types must first be created before applying them to a break. To review your break types, click the “Break Types” button in the breaks setup page.



8.3.1.1 Creating a Break Type

1. Click “+ New” to create a new break type.



2. Enter the required fields.

Field Name	Description
<u>“Code”</u>	A short name for the break type.
<u>“Name”</u>	The name of the break type.
<u>“Paid Duration”</u>	Identifies the number of minutes or hours that the break will be paid.
<u>“Unpaid Duration”</u>	Identifies the number of minutes or hours that the break will be unpaid.
<u>“Description”</u>	Optional field that describes the break type.

3. Click the save button to save your changes.

Break Types Setup

Code: 100

Name: Unpaid 30min Break

Paid Duration: 0 minutes

Unpaid Duration: 30 minutes

Description:

Save button (green square with lock icon) highlighted in red.

8.3.1.2 Editing a Break Type

1. From the list of break types, select the break type you want to edit.

Break Types Setup

+ New

Code	Name	Description	Paid Duration	Unpaid Duration
100	Unpaid 30min Break		0.0000m	30.0000m
200	Paid Lunch Break		0.0000m	1.0000h
300	Coffee Break 2		0.0000m	15.0000m

2. Edit the fields as required.
3. Click the save button to save your changes.

Break Types Setup

Code: 100

Name: Unpaid 30min Break

Paid Duration: 0 minutes

Unpaid Duration: 30 minutes

Description:

Save button (green square with lock icon) highlighted in red.

8.3.1.3 Deleting a Break Type



If the break type is already assigned to a break, you cannot delete the break type. You must assign a different break type to the break before attempting to delete it.

1. From the list of break types, select the break you want to delete.
2. Click the delete button to delete the break type.

3. Harmony will ask for your confirmation that you want to delete the break type. Click **“Delete”** to delete the break type. The break type is now deleted.



If you accidentally deleted a break type, you can re-create it manually.

8.3.2 Breaks

Once you have set up your break types, you can set up your breaks and apply them to your shifts later.

8.3.2.1 Creating a Break

1. Click “+ New” to create a new break.

Code	Name	Break Type
200	Lunch Break	200 - Paid Lunch Break
100	Unpaid Break	100 - Unpaid 30min Break

2. Enter the required fields.



You can only set up one break trigger per break – either earliest/latest time or eligible after clocking in. For the first trigger, you can set up the earliest and latest time an employee can take the break. For the second trigger, you can restrict employees from taking the break right after clocking in or right before clocking out.

Field Name	Description
<u>“Code”</u>	A short name for the break.
<u>“Name”</u>	The name of the break.
<u>“Can Be Taken X Times”</u>	Identifies the number of times this break can be taken per shift.
<u>“Break Type”</u>	Identifies the break type for the break. Refer to Break Types .
<u>“Earliest Time”</u>	Identifies the earliest time an employee can take the break.
<u>“Latest Time”</u>	Identifies the latest time an employee can take the break.
<u>“Eligible for X After Clocking In”</u>	Identifies when the employee can take the break after clocking in.

"For X"

Identifies how long after clocking in that the employee can take a break.

3. Click the save button to save your changes.

8.3.2.2 Editing a Break

1. From the list of breaks, select the break you want to edit.

Code	Name	Break Type
200	Lunch Break	200 - Paid Lunch Break
100	Unpaid Break	100 - Unpaid 30min Break

2. Edit the fields as required.
3. Click the save button to save your changes.

8.3.3.3 Deleting a Break



If the break is already assigned to a shift, you cannot delete the break. You must assign a different break to the shift before attempting to delete it.

1. From the list of breaks, select the break you want to delete.
2. Click the delete button to delete the break.

3. Harmony will ask for your confirmation that you want to delete the break. Click **“Delete”** to delete the break. The break is now deleted.



If you accidentally deleted a break, you can re-create it manually.

8.4 Overtime

You can set up automatic overtime rules based on your employees exceeding the number of hours worked per day, per week, per timesheet period, or others. Depending on the working time that is recorded in your employees' timesheets, Harmony will automatically activate and apply your overtime rules. To review your overtime rules, navigate to Setup > Overtime.

Code	Name	Type	Description
Daily	Daily Overtime	Daily	
Time	Time and a Half	Bi-Conditional OR	

8.4.1 Creating an Overtime Group

1. Click “+ New” to create a new overtime group.

Code	Name	Status
1101	OT	Active

2. Ensure the overtime group is active by using the toggle at the top of the window.

Overtime Setup

Code: 1101 Name: OT

3. Enter the required fields.

Field Name	Description
<u>“Code”</u>	A short name for the overtime group.
<u>“Name”</u>	The name of the overtime group.

4. In the *Rules* section, define your rules for this overtime group. You may want to add in the default rules by clicking the “Default Rules” button. To add your own custom rules, click the “+” button.

Priority	Rule Type	Pay Code
1	Statutory Holidays	112 - Statutory Holiday

5. Define your *“Rule Type”*.

Overtime Rule Type	Description
Daily	Calculates overtime based on hours worked on a particular day of the week, after a defined threshold. For example, working more than 8 hours on a weekday may be considered overtime.
Weekly	Calculates overtime based on hours worked in a given working week, after a defined threshold. The working week is defined in your Preferences . For example, working more than 44 hours within a working week may be considered overtime.
Statutory Holidays	Calculates overtime based on hours worked on a statutory holiday. This rule type works together with your defined holiday calendars. Review the Holiday Calendars section for more information. For example, if an employee works on New Year’s Day, the time worked on New Year’s Day will be considered overtime.
Timesheet Period	Calculates overtime based on hours worked in the whole timesheet period. Review the Timesheet Periods For example, working more than 88 hours in a bi-weekly timesheet period may be considered overtime.

6. Identify which days of the week this overtime rule will apply to if your rule type is daily.
7. Identify if this overtime rule should apply on unworked holidays.
8. Identify if this overtime rule should exclude time worked in certain projects, tasks, or activities.
9. Identify if this overtime rule should exclude time off taken for certain time off types.
10. Identify the number of hours and the pay code of which this overtime rule should apply to. You may add a second calculation, if required.

Overtime Rules ✕

Rule Type

Daily ▼

Days

Monday Tuesday Wednesday Thursday Friday

Saturday Sunday

Exclude unworked holidays

Exclude Projects

Exclude Time Offs

105S - Salary Vacation

	No. of Hours	Name
+ -	8	103 - Overtime 1.5 ✕ ▼
+ -	10	104 - Overtime 2 ✕ ▼

✖
+

- Click the save button to save your changes.
- Repeat steps 3 through 9 for each overtime rule that should belong in this overtime group.
- Once all rules are created, you may want to change the priority of each rule in the group using the menu button. The lower the number, the higher the priority. For example, an overtime rule with the priority “1” will be the first rule to be applied in order to calculate overtime. Only if there is no time that follows this rule, will the overtime with the priority “2” be applied.



You can click the **“Default Order”** button to apply your rules in the default order, which is Statutory Holidays, Daily, Weekly, Timesheet Period.

- Click the save button to save your changes.

8.4.2 Assigning an Overtime Group



Each employee can only have one overtime group assigned at a time. Assigning them the new overtime group will automatically unassign them from the existing overtime group. Please note that even if you assign the employee to a new overtime group, existing records, including those that are approved or submitted for approval, will still belong to the existing overtime group. You must reject these items in order to re-calculate overtime using the new overtime group rules.

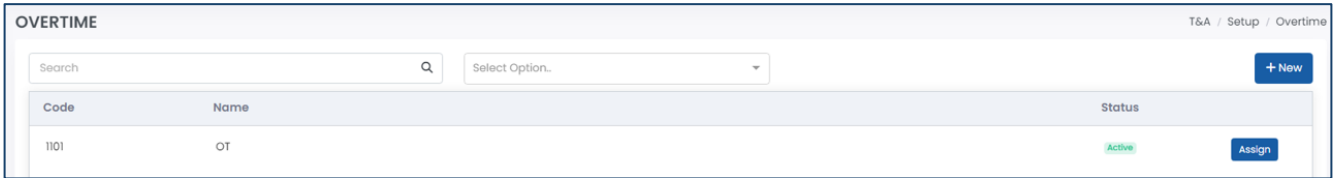
- From the list of overtime rules, click the **“Assign”** button for the overtime group you want to assign.

- Select the employees you want to assign this overtime group to.

- Click the **“Assign”** button to assign the employees.

8.4.3 Editing an Overtime Group

1. From the list of overtime groups, select the overtime group you want to edit.

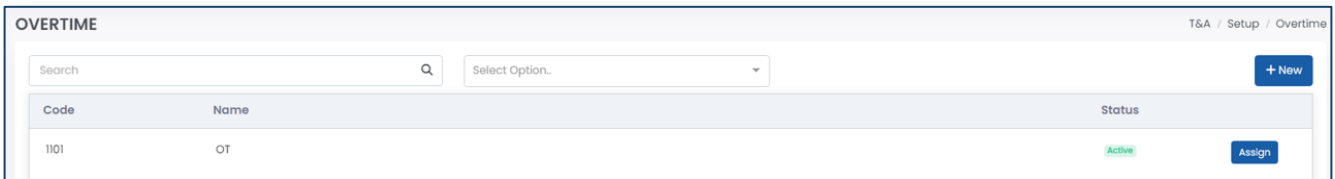


2. Edit the fields as required.
3. Click the save button to save your changes.

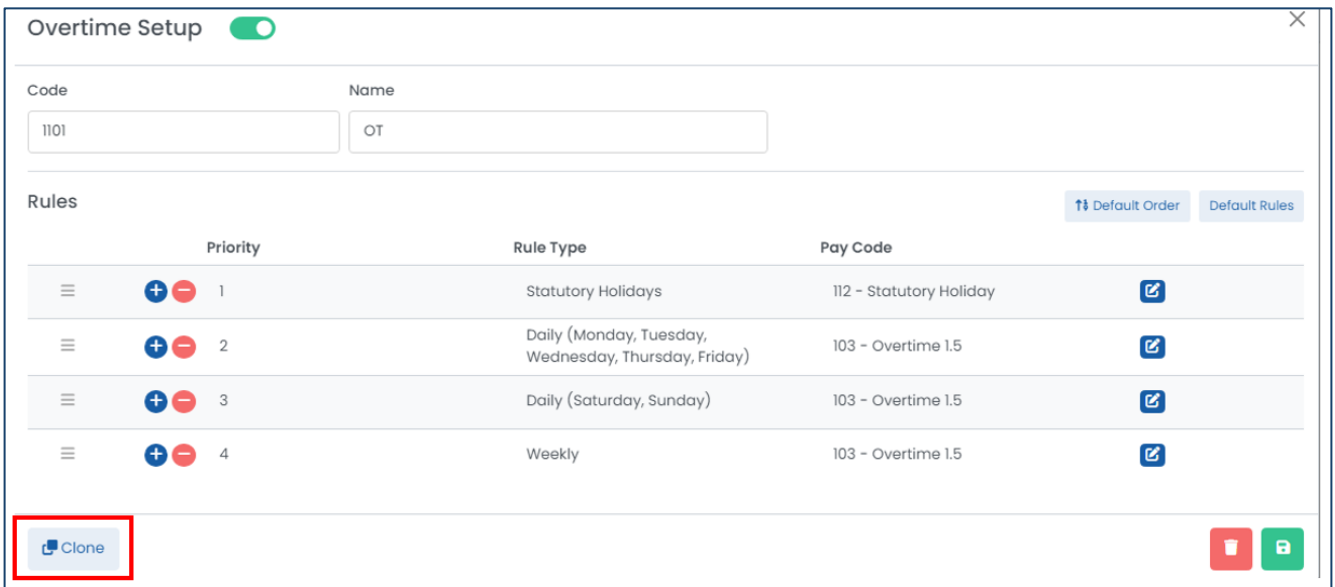
8.4.4 Cloning an Overtime Group

You may want to clone an overtime group if you want to use the same rules as a majority for a new overtime group but make minor changes.

1. From the list of overtime rules, select the overtime group you want to clone.



2. Click the "Clone" button.



3. Follow the same steps when [Creating an Overtime Group](#).

8.4.5 Deleting an Overtime Group



If the overtime rule is already assigned to an employee, you cannot delete the overtime rule. You must assign the employee(s) to another overtime rule before attempting to delete it.

1. From the list of overtime rules, select the overtime group you want to delete.

Code	Name	Status
1101	OT	Active

2. Click the delete button to delete the overtime group.

Priority	Rule Type	Pay Code
1	Statutory Holidays	112 - Statutory Holiday
2	Daily (Monday, Tuesday, Wednesday, Thursday, Friday)	103 - Overtime 1.5
3	Daily (Saturday, Sunday)	103 - Overtime 1.5
4	Weekly	103 - Overtime 1.5

3. Harmony will ask for your confirmation that you want to delete the overtime group. Click **“Delete”** to delete the overtime group. The overtime group is now deleted.

Are you sure you want to delete this overtime and its rules?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



If you accidentally deleted an overtime group, you can re-create it manually.

8.5 Terminal Mode

Harmony features a 'terminal mode', in which you or your managers can set up on a stationary machine at your workplace. You can set up a terminal on any device, including a computer, tablet, or mobile device. Terminal mode essentially works like a hardware time clock – your employees can clock in using a six-digit PIN instead of logging into a browser to access Harmony Time & Attendance. You can review your terminals by navigating to Setup > Terminals.

Code	Name	Location	Type	No of Employees	
001	Terminal 1	Canada		5	<input checked="" type="checkbox"/>
002	Terminal 2	USA		5	<input checked="" type="checkbox"/>

8.5.1 Creating a Terminal

1. Click “+ New” to create a new terminal.

2. Enter the required fields.

Field Name	Description
<u>“Code”</u>	A short name for the terminal.
<u>“Name”</u>	The name of the terminal.
<u>“Default Location”</u>	The default location of the terminal.
<u>“Default Task”</u>	The default project and task of the terminal for employees who use it.
<u>“Require Photo to Clock In”</u>	If ticked, requires a photo to be taken of the employee when they clock in. The device used for this terminal must have a camera and allow Harmony to access the camera.
<u>“Require Photo to Clock Out”</u>	If ticked, requires a photo to be taken of the employee when they clock out. The device used for this terminal must have a camera and allow Harmony to access the camera.
<u>“Allow Employees to Change Location”</u>	If ticked, allows the employee to change their location when clocking in.
<u>“Allow Employees to Write Note”</u>	If ticked, allows the employee to write a note when clocking in/out.
<u>“Description”</u>	An optional field that describes the terminal.
<u>“URL”</u>	The URL used to access the terminal.

3. Assign this terminal to employees in the ‘Assign’ tab on the right side of the window. This will create six-digit PINs for your employees to use when logging into the terminal.
4. Navigate to the ‘Messages’ tab.
5. Modify the messages if required.

Field Name	Description
<u>“Welcome Message”</u>	The message displayed when logging into the terminal.
<u>“Clock In Successfully Message”</u>	The message displayed when successfully clocking into the terminal.
<u>“Clock Out Successfully Message”</u>	The message displayed when successfully clocking out of the terminal.

6. Click the save button to save your changes.

Terminal Setup

Code: 001

Name: Terminal 1

Default Location: 100 - Canada

Default Task: ACTI Activity 1

Require photo to clock in

Require photo to clock out

Allow employees to change location

Allow employees to write note

Description:

URL: www.yourterminal.com

Select Location

Select Department

Select Custom Group

Search

ALL (5/5)

100 - Sullivan, James

101 - Wazowski, Mike

103 - Gibbs, Boo

104 - Tilly, Celia

105 - Peterson, Roz

Send PIN to assigned employees

8.5.2 Editing a Terminal

1. From the list of all terminals, select the terminal that you want to edit.

Code	Name	Location	Type	No of Employees
001	Terminal 1	Canada		5
002	Terminal 2	USA		5

2. Edit the fields as required.
3. Click the save button to save your changes.

8.5.2 Deleting a Terminal



If the terminal is already in use, you cannot delete the terminal. You must ensure that the terminal is not being used anywhere before attempting to delete it.

1. From the list of all terminals, select the terminal that you want to delete.
2. Click the delete button to delete the terminal.

Terminal Setup

Code: 001

Name: Terminal 1

Default Location: 100 - Canada

Default Task: ACTI Activity 1

Require photo to clock in

Require photo to clock out

Allow employees to change location

Allow employees to write note

Description:

URL: www.yourterminal.com

Select Location

Select Department

Select Custom Group

Search

ALL (5/5)

100 - Sullivan, James

101 - Wazowski, Mike

103 - Gibbs, Boo

104 - Tilly, Celia

105 - Peterson, Roz

Send PIN to assigned employees

3. Harmony will ask for your confirmation that you want to delete the terminal. Click “Delete” to delete the terminal. The terminal is now deleted.



Deleting a terminal will automatically remove the employees’ PIN. Recreating the terminal will generate a new PIN for your employees.

Are you sure you want to delete this terminal?

This action is PERMANENT and CANNOT be reverted

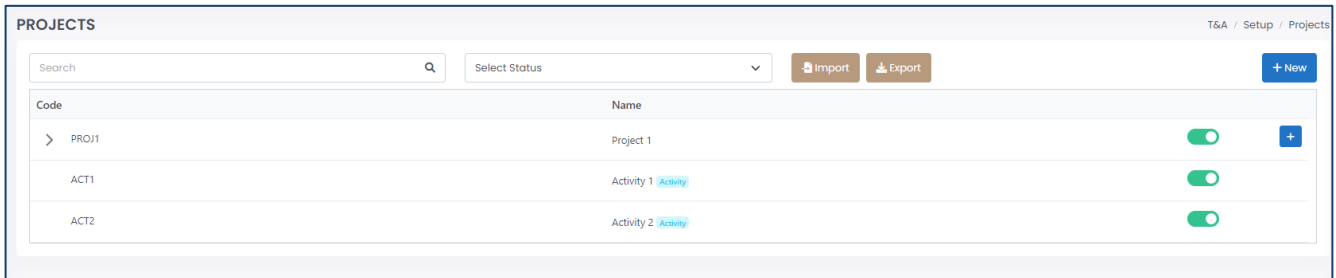
DELETE CANCEL



If you accidentally deleted a terminal, you can re-create it manually.

8.6 Projects & Tasks

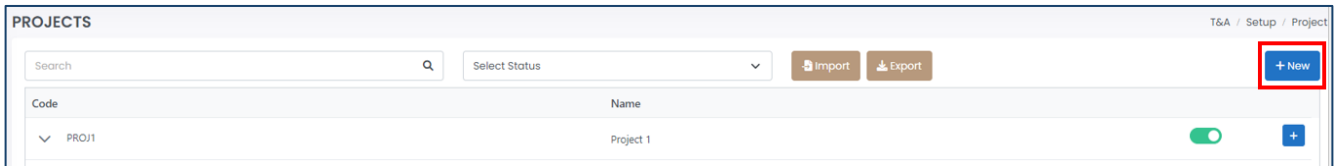
Your projects are the things that your employees will clock or punch into when they are working. If you are using the labor module of Harmony Payroll or have any dimensions, branches, or other allocations, these will be especially helpful. You must set up at least one project to track your employees' worked time. A project can consist of multiple tasks that need to be completed to reach a specific goal or end product/service. To review your projects and tasks, navigate to Setup > Projects.



8.6.1 Creating a Project

You must first create a project before creating a task. Each project must have at least one (1) task.

1. Click “+ New” to create a new project.



2. Enter the required fields. You may also assign this project to employees on the right side of the window.

Field Name	Description
<u>“Code”</u>	A short name for the project.
<u>“Name”</u>	The name of the project.
<u>“Location”</u>	Where the project is located.
<u>“Department”</u>	The department that this project belongs to.
<u>“Pay Code”</u>	The pay code that is associated to the project.
<u>“Is Activity”</u>	Identifies if the project is an ongoing activity or not. If ticked, you do not need to enter the start/end date or indicate the progress. You will also not be allowed to create tasks for the activity. If not ticked, those fields will be required and you may create a task for the project.
<u>“Start Date”</u>	The start date of the project if the project is not an activity. If the project has not started, your employees cannot use this project to clock in.
<u>“End Date”</u>	The end date of the project if the project is not an activity. If the project is ended, your employees cannot use this project to clock in.
<u>“Progress Status”</u>	Identifies if the project is completed or not. If it is completed, your employees cannot use this project to clock in.

3. Click the save button to save your changes.

Project Setup

Code: PROJ1

Name: Project 1

Location: 100 - Canada

Department: 100 - Administration

Pay Code: 102 - Hourly Wages

Start Date: 03/01/2022

End Date: 03/30/2023

Progress Status: Not Completed

Select Location

Select Department

Search



ALL (5/5)

100 - Sullivan, James

101 - Wazowski, Mike

103 - Gibbs, Boo

104 - Tilly, Celia

8.6.2 Creating a Task

Each project must have at least one (1) task, but you can create an unlimited number of tasks per project. You can also create child or sub-tasks for each task.

1. From the list of projects, click the “>” button to expand the tasks within a project. The list of tasks will be expanded and are indented.

PROJECTS

Search Select Status

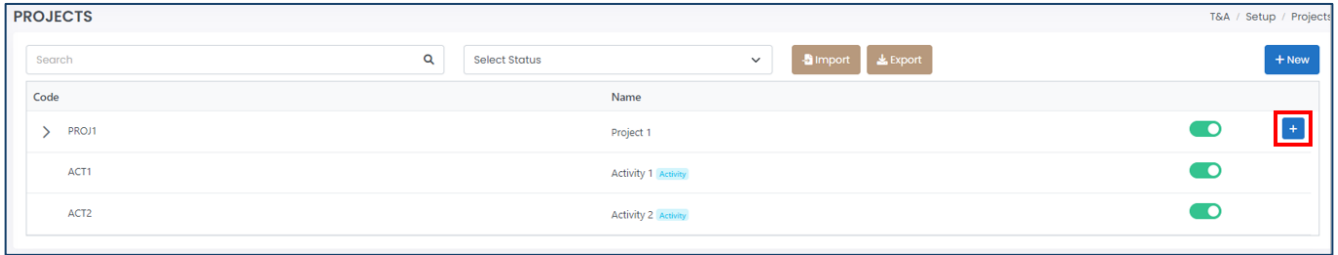
Code	Name		
PROJ1	Project 1	<input checked="" type="checkbox"/>	<input type="button" value="+"/>
ACT1	Activity 1 <small>Activity</small>	<input checked="" type="checkbox"/>	
ACT2	Activity 2 <small>Activity</small>	<input checked="" type="checkbox"/>	

PROJECTS

Search Select Status

Code	Name		
PROJ1	Project 1	<input checked="" type="checkbox"/>	<input type="button" value="+"/>
T1	Task 1	<input checked="" type="checkbox"/>	<input type="button" value="+"/>
T2	Task 2	<input checked="" type="checkbox"/>	<input type="button" value="+"/>
ACT1	Activity 1 <small>Activity</small>	<input checked="" type="checkbox"/>	
ACT2	Activity 2 <small>Activity</small>	<input checked="" type="checkbox"/>	

- Click “+” on the preceding tier (e.g. a project) to create a task beneath the selected project. If you want to create a sub-task, click “+” on the task you want to create a sub-task under.



- Enter the required fields. The required fields are the same as those for Projects. You may also assign this project to employees on the right side of the window.

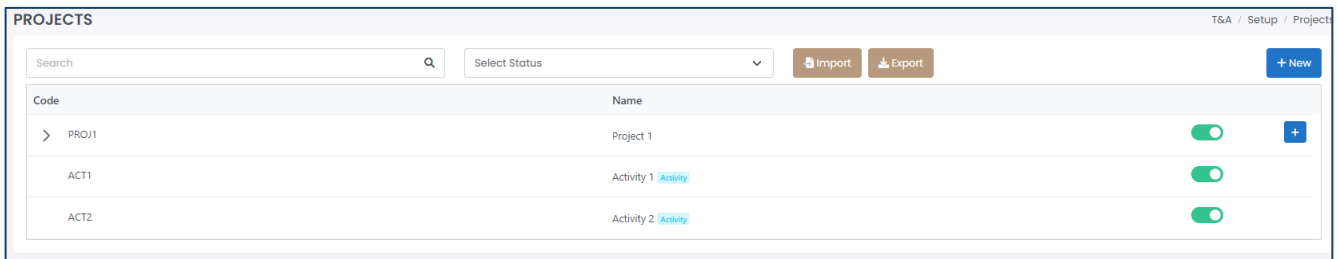


The “*Start Date*” and “*End Date*” must be within the same date range as its parent. For example, if the project is from 01/01/2022 - 06/01/2022, the task cannot begin earlier than 01/01/2022 and cannot end later than 06/01/2022.

- Click the save button to save your changes.

8.6.3 Editing a Project or Task

- From the list of projects and tasks, click the project or task that you want to edit.



- Edit the fields as required.
- Click the save button to save your changes.

The Project Setup form contains the following fields and options:

- Code: PROJ1
- Name: Project 1
- Location: 100 - Canada
- Department: 100 - Administration
- Pay Code: 102 - Hourly Wages
- Start Date: 03/01/2022
- End Date: 03/30/2023
- Progress Status: Not Completed
- Select Location: [Dropdown]
- Select Department: [Dropdown]
- Search: [Search Bar]
- Employee Selection:
 - ALL (5/5)
 - 100 - Sullivan, James
 - 101 - Wazowski, Mike
 - 103 - Gibbs, Boo
 - 104 - Tilly, Celia

8.6.4 Deleting a Project or Task



If the project or task is already assigned to an employee, you cannot delete the project or task. You must unassign the project or task from the employee(s) before attempting to delete it.

1. From the list of projects and tasks, click the project or task that you want to delete.
2. Click the delete button to delete the project or task.



If you attempt to delete a project, all subsequent tasks will also be deleted.

3. Harmony will ask for your confirmation that you want to delete the project or task. Click **“Delete”** to delete the project or task. The project or task is now deleted.

Are you sure you want to delete this project?

This action is PERMANENT and CANNOT be reverted



If you accidentally deleted a project or task, you can re-create it manually.

8.7 Rounding Rules

Rounding is a common practice used in payroll and timekeeping to simplify the tracking of employees' worked hours. It involves rounding an employee's clock-in and/or clock-out times to predetermined increments, typically between 1-minute to 15-minute intervals. An important rule is that your time clock rounding must be either neutral or favorable towards your employees.

8.7.1 Creating a Rounding Rule



Please check with your local labor laws to determine what rounding rules are considered to be legal.

1. Navigate to Setup > Rounding Rules.
2. Click **" + New "** to create a new rounding rule.

3. Enter the required fields.

Field Name	Description
<u>"Code"</u>	A short name for the rounding rule.
<u>"Name"</u>	The name of the rounding rule.
<u>"Description"</u>	An optional field that describes the rounding rule.

4. Use the toggle if you want to enable "Total Hour Rounding", if you use flexible shifts. This will enable you to round the entire duration of a clock entry instead of specifically the clock-in and clock-out times. For example, if rounding the total hours to the nearest 30 minutes, a clock entry that is 28 minutes in duration will be rounded to 30 minutes.
5. Identify the *Clock In* and *Clock Out* rules.

Direction	Description
No Preference	Rounding time worked either up or down. For example, if rounding to the nearest 5 minutes, a clock entry that starts at 6:03am will be rounded up to 6:05am. However, a clock entry that starts at 6:02am will be rounded down to 6:00am.
Ceiling	Rounding up. For example, if rounding up to the nearest 5 minutes, a clock entry that starts at 6:03am will be rounded to 6:05am.
Floor	Rounding down. For example, if rounding down to the nearest 5 minutes, a clock entry that starts at 6:03am will be rounded to 6:00am.

⚠ CAUTION: Please be advised that you should check your local labour laws to determine if rounding policies are legally applicable.

Code

Name

Description

Enable Total Hour Rounding

Clock In

Direction

Round To

Clock Out

Direction

Round To

✖ ✔

6. Click the save button to save your changes.

8.7.2 Editing a Rounding Rule

1. From the list of rounding rules, select the rounding rule that you want to edit.

ROUNDING RULES			T&A / Setup / Rounding Rules
<input type="text" value="Search"/>			+ New
Code	Name	Description	
001	Default Rounding		
002	Round 1		

2. Edit the fields as required.
3. Click the save button to save your changes.

8.7.3 Deleting a Rounding Rule



If the rounding rule is already assigned to a shift, you cannot delete the rounding rule. You must unassign the rounding rule from the shift(s) before attempting to delete it.

1. From the list of rounding rules, click the rounding rule that you want to delete.

ROUNDING RULES			T&A / Setup / Rounding Rules
Code	Name	Description	+ New
001	Default Rounding		
002	Round 1		

2. Click the delete button to delete the rounding rule.

CAUTION: Please be advised that you should check your local labour laws to determine if rounding policies are legally applicable.

Code: 001 Name: Default Rounding

Description:

Enable Total Hour Rounding:

Clock In

Direction: No Preference

Round To: 5 minutes

Clock Out

Direction: No Preference

Round To: 5 minutes

Delete **Save**

3. Harmony will ask for your confirmation that you want to delete the rounding rule. Click **“Delete”** to delete the rounding rule. The rounding rule is now deleted.

Are you sure you want to delete this rounding?

This action is PERMANENT and CANNOT be reverted

DELETE **CANCEL**



If you accidentally deleted a rounding rule, you can re-create it manually.

8.8 Shifts

Shifts are used to ensure that your employees clock in and out at the correct times, taking into consideration any grace times, breaks, and overtime. At the time of this manual, employees can only be assigned to one shift at a time. You can review the setup for your shifts by navigating to Setup > Shifts.

SHIFTS			
Code	Name	Description	Employees
100	Regular Shift		2
200	Part Time Shift		3

8.8.1 Creating a Shift

1. Click “+ New” to create a new shift.

SHIFTS			
Code	Name	Description	Employees

2. Enter the required fields. You can also assign this shift to employees on the right side of the window.

Field Name	Description
<u>“Code”</u>	A short name for the shift.
<u>“Name”</u>	The name of the shift.
<u>“Location”</u>	Where the shift will be worked.
<u>“Shift Type”</u>	The type of shift – either flexible or fixed. If flexible, your employees can start at any time as long as they work the defined number of hours. If fixed, you can identify when your employees must start and end their day, with the ability to include grace in/out times.
<u>“Apply to”</u>	The days of the week that this shift applies to.
<u>“Description”</u>	An optional field that describes the shift.
<u>“Breaks Allowed”</u>	Identifies if breaks are allowed for your employees working this shift. If ticked, you must select at least one break.
<u>“Automatically Clock Out”</u>	Automatically clocks your employees out after a defined period of time or at a certain time of day.
<u>“Overnight”</u>	Identifies if your employees working this shift will be an overnight shift (past 12AM).

3. Click the save button to save your changes.

Shift Setup

Code: 101

Name: Reg Shift

Location: 100 - Canada

Shift Type: Fixed Flexible

IN Time: 9:00 AM Grace IN: 15 min.

OUT Time: 5:00 PM Grace OUT: 15 min.

Apply to: Mon Tue Wed Thu Fri Sat Sun

Description:

Breaks Allowed: Automatically clock out: Overnight:

200 - Lunch Break

at (time) 5:30 PM

Save button highlighted in red box.

8.8.2 Editing a Shift

1. From the list of shifts, click the shift you want to edit.

SHIFTS

T&A / Setup / Shifts

Search

+ New

Code	Name	Description	Employees
100	Regular Shift		2
200	Part Time Shift		3

2. Edit the fields as required.

3. Click the save button to save your changes.

Shift Setup

Code: 101

Name: Reg Shift

Location: 100 - Canada

Shift Type: Fixed Flexible

IN Time: 9:00 AM Grace IN: 15 min.

OUT Time: 5:00 PM Grace OUT: 15 min.

Apply to: Mon Tue Wed Thu Fri Sat Sun

Description:

Breaks Allowed: Automatically clock out: Overnight:

200 - Lunch Break

at (time) 5:30 PM

Save button highlighted in red box.

8.8.3 Deleting a Shift



If the shift is already assigned to an employee, you cannot delete the shift. You must assign the employee(s) to a different shift before attempting to delete it.

1. From the list of shifts, click the shift that you want to delete.
2. Click the delete button to delete the shift.

3. Harmony will ask for your confirmation that you want to delete the shift. Click **“Delete”** to delete the shift. The shift is now deleted.



If you accidentally deleted a shift, you can re-create it manually.

8.9 Time Off / PTO / Absences

Your time off covers the periods of which your employees do not report to work due to illness, vacation, or other reasons. You can add and assign an unlimited number of time off types to your employees. To review your time off types, navigate to Setup > Time Off.

Code	Name	Type	Expiry Date
VAC	Vacation	Permanent	
SIC	Sick Pay	Permanent	

8.9.1 Creating a Time Off Type

1. Click “+ New” to create a new time off type.

2. Enter the required fields.

Field Name	Description
<u>“Code”</u>	A short name for the time off type.
<u>“Name”</u>	The name of the time off type.
<u>“Time Off Unit”</u>	Identifies if the time off balance for employees will be shown and requested in hours or days.
<u>“Temporary”</u>	Identifies if the time off type will only be used temporarily. If ticked, you must enter an expiry date.
<u>“Calendar Color”</u>	The color of this time off type that will be displayed in the calendar. This is a required field if you have <u>“Display on Calendar”</u> ticked.
<u>“Assign To”</u>	Identifies which employees are eligible to request time off using this time off type.
<u>“Policy Type”</u>	How this time off type will be can be set up (if any). If ‘No Policy’, no accruals are required (e.g. unpaid time off). If ‘Initial Policy’, a standard accrual will occur but it does not depend on years of service (e.g. sick time). If ‘Set of Policies’, accruals will accrue depending on the years of service (e.g. vacation).
<u>“Entitlement Date”</u>	Only required if policy type is ‘initial policy’ or ‘set of policies’. Identifies the date that the accrual will be made. If ‘Employee’s Start Date’, accruals occur based on the employee’s date of hire. If ‘After Employee’s Start Date’, accruals occur after the employee’s date of hire. If ‘Fiscal Year’, accruals occur on your fiscal year, as set up in your system preferences. If ‘After Employee’s Start Date Based on Fiscal Year’, accruals occur on your fiscal year but takes the employee’s years of service into account.
<u>“Accrues”</u>	Identifies how your time off type is accrued. If ‘Yearly’, this time off type will accrue once per year based on the entitlement date. If ‘By Timesheet Period’, this time off type will accrue several times a year based on the employee’s assigned timesheet or pay period (e.g. accruing weekly or bi-

	weekly). If 'By Hours Worked', this time off type will accrue depending on the number of hours that your employees work (e.g. accrue 2 hours for every 80 hours worked).
<u>"Balance"</u>	Identifies how many units are accrued based on the accrual rule.
<u>"Occurs X After the End of Timesheet Period"</u>	When the balance is accrued after the end of the timesheet period. This field only applies if your accrual rule is by timesheet period or by hours worked.
<u>"Allow Employees to Carry Over"</u>	If ticked, allows your employees to carry over the specified number of units from one period to the next.
<u>"Limit Max Balance"</u>	If ticked, limits the number of units your employees can have at one time. If your employees accrual is already at the defined maximum, they will not be able to accrue more units until they use what they have.
<u>"Limit Max Requested"</u>	If ticked, limits the number of units your employees can request for in one record. If your employee wants to request for more than the defined maximum, they must submit multiple requests.
<u>"Probation"</u>	The period of time after an employee's date of hire before they are eligible to request time off using this time off type.
<u>"Pay Code"</u>	The pay code that is associated to the time off type.
<u>"Leave Units Will Be Deducted If It Overlaps with Holidays and Weekends"</u>	If ticked, the employee's balance will be deducted if their request falls on a holiday (as defined in your holiday calendar) or weekend/days that your employee does not work (as defined in their assigned shift).
<u>"Allow Negative Balance"</u>	If ticked, your employee is allowed to request for time off even if they have not accrued enough units.
<u>"Booking Required"</u>	If ticked, the time off requests must go through your approval path.
<u>"Display on Calendar"</u>	If ticked, approved requests for this time off type will appear in the time off calendar in Time Off > Calendar.
<u>"Default to New Employee"</u>	If ticked, this time off type will automatically be assigned to new employees that you create in the system.

3. Click the save button to save your changes.

8.9.2 Editing a Time Off Type



You cannot edit a time off type if it was used in any time off records.

1. From the list of time off types, click the time off type that you want to edit.

Code	Name	Type	Expiry Date
VAC	Vacation	Permanent	
SIC	Sick Pay	Permanent	

2. Edit the fields as required.
3. Click the save button to save your changes.

Code: VAC
Name: Vacation
Time Off Unit: Days Hours
 Temporary
Calendar Color: #d03dc6
Assign To: ALL (6/5), 100 - Sullivan, James, 101 - Wazowski, Mike, 103 - Gibbs, Boo
Policy Type: No Policy, Initial Policy, Set of Policies
Policy Name: 0 to 2 years (Fiscal Year), 2 to 5 years (2 Year After Employees start date based on fiscal year), 5 to 10 years (5 Year After Employees start date based on fiscal year)
Probation: Days Months
Pay Code: 105 - Vacation Paid
 Leave units will be deducted if it overlaps with holidays and weekends
 Allow negative balance
 Booking required
 Display on calendar
 Default to new employee

8.9.3 Adjusting Time Off Balances for Employees

You can easily adjust your employees' time off balances.



You can adjust the balances for assigned time off types on a time off type level. If you want to adjust balances for employees on an employee level, please review the [Adjusting an Employee's Time Off Balances](#) section.

1. From the list of time off types, verify which type you want to adjust.
2. Click **“Adjust”** to adjust the balances of your selected time off type. You will see the employees who are assigned this time off type and their current balance.

The screenshot shows the "TIME OFF" management interface. At the top, there is a search bar and a "+ New" button. Below is a table with columns: Code, Name, Type, and Expiry Date. Two rows are visible: "VAC - Vacation" and "SIC - Sick Pay", both with a "Permanent" type. To the right of each row is an "Adjust" button, which is highlighted with a red box in the image.

Code	Name	Type	Expiry Date
VAC	Vacation	Permanent	
SIC	Sick Pay	Permanent	

3. Enter the amount that you want to adjust the type by. Enter a positive number to increase the balance or enter a negative number with a “-” symbol preceding the number to reduce the balance.

The screenshot shows the "Adjust Time Off Balances" dialog box for "VAC - Vacation". It includes a search bar, a filter icon, and an "Apply To All" button. The main table lists employees with their current balances and an "Adjust Balance By" field. The value "2" is entered in the "Adjust Balance By" field for all employees. A refresh button is next to each input field. At the bottom, there are "Audit History" and "Save" buttons.

Employee	Current Balance	Adjust Balance By
Gibbs, Boo	10	2
Peterson, Roz	10	2
Sullivan, James	10	2
Tilly, Celia	10	2
Wazowski, Mike	10	2

4. Click the refresh button if you want to reset the number back to the original current balance.
5. Click the save button to save your changes. You can also reopen to check the Audit History of all adjustments to the balances made.

8.9.4 Deleting a Time Off Type



If the time off type is already assigned to an employee, you cannot delete the time off type. You must unassign this time off type from the employee(s) before attempting to delete it.

1. From the list of time off types, click the time off type that you want to delete.
2. Click the delete button to delete the time off type.

Time Off Setup

Code: VAC

Name: Vacation

Time Off Unit: Days Hours

Temporary

Calendar Color: #d03dc6

Assign To:

Select Location: [Dropdown]

Select Department: [Dropdown]

Search: [Input]

ALL (5/5)

100 - Sullivan, James

101 - Wazowski, Mike

103 - Gibbs, Boo

Policy Type: No Policy Initial Policy Set of Policies

Policy Name	Entitlement Date
0 to 2 years	Fiscal Year
2 to 5 years	2 Year After Employees start date based on fiscal year
5 to 10 years	5 Year After Employees start date based on fiscal year

Probation: [Input] Days Months

Pay Code: 105 - Vacation Paid

Leave units will be deducted if it overlaps with holidays and weekends

Allow negative balance

Booking required

Display on calendar

Default to new employee

[Delete Button]

3. Harmony will ask for your confirmation that you want to delete the time off type. Click **“Delete”** to delete the time off type. The time off type is now deleted.

Are you sure you want to delete this Time Off Setup?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



If you accidentally deleted a time off type, you can re-create it manually.

8.10 Company Preferences

Your company preferences are your default settings for your employees. When you create a new employee in Harmony, the employee’s profile will automatically take the settings defined here. These settings, however, can be overwritten at the employee level, which is covered in the next section: [Employee Preferences](#). To review your company preferences, navigate to Setup > Preferences.

8.10.1 Editing Your Company Preferences

1. Edit the fields as required.

Field Name	Description
<u>“Default First Day of Week”</u>	The default first day of the week.
<u>“Default Timesheet Approval Path”</u>	Read-only field that identifies the default approval path for timesheets.
<u>“Default Time Off Approval Path”</u>	Read-only field that identifies the default approval path for time off.
<u>“Default Timesheet Period”</u>	The timesheet period that is assigned to employees by default.
<u>“Default Time Off Balance Unit”</u>	The default unit selection for new time off types that are created.
<u>“Default Hours Per Day”</u>	The number of hours per day that the average employee works.
<u>“Default Project/Task”</u>	The project/task that will be assigned to employees by default.
<u>“Default Pay Code”</u>	The pay code that will be assigned to new projects, tasks, time off types, and overtime that are created.
<u>“Default Shift”</u>	The shift that will be assigned to employees by default.
<u>“Default Time Off Type”</u>	The time off type that will be assigned to employees by default.
<u>“Allocate Clock In/Out According to Clock Out Day”</u>	If ticked, any overnight shifts will be allocated to the clock out day if clocking in on one day and clocking out another.
<u>“Require Approvals for All Clock Entries”</u>	If ticked, all clock entries require approval before they are pushed to the employees’ timesheets.
<u>“Auto-Create Timesheets with Existing Clock Entries”</u>	If ticked, timesheets will automatically be created as long as there exists an approved (if requires approval) clock entry. If clock entries do not require approval, timesheets are automatically created when clock entries are created.
<u>“Show Inactive/Terminated Employees”</u>	If ticked, shows all inactive or terminated employees, along with your active employees, throughout the Time & Attendance module.



2. Click the save button to save your changes.



Your company preferences can be overwritten per employee on the employee level. Review the [Employee Preferences](#) section for more details.

8.11 Notifications

Your notifications can be automatically sent via email, web/browser, and/or mobile application when certain criteria is triggered. You can also set up email templates with dynamic fields for email notifications. To review your notifications, navigate to Setup > Notifications.

NOTIFICATIONS					T&A / Setup / Notifications		
Search							
Notification Name		Email	Web	Mobile App			
Employee is absent		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Clock In		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			



1. To enable or disable your notifications, use the toggle for the specified notification for email, web/browser, and/or mobile app. If the toggle is green and the slider is toggled to the right, it is enabled. If the toggle is grey and the slider is toggled to the left, it is disabled.



If you toggle any notification for email notifications, you must select an email template.

8.11.1 Selecting an Email Template for Email Notifications

1. From the list of notifications, identify which notification you want to assign an email template for.
2. Click the edit button next to the notification.

NOTIFICATIONS					T&A / Setup / Notifications		
Search							
Notification Name		Email	Web	Mobile App			
Employee is absent	 Select Email Template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
Clock In		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

3. Select the email template that you want to assign to this notification. If you want to create a new email template for this notification, click **“Add New Template”** instead.

Notification Setup

Email Template:



A new window will open up to allow you to create a new email template. Review the *Harmony Company User Manual* for more information.

8.12 Employee Preferences

You can override your company preferences on an employee level per employee. To review your employees' Time & Attendance setup, navigate to Setup > Employees.



The preferences you define here are only for the employee that you select. If you want to have default values for every new employee you create in Harmony, review the [Company Preferences](#) section.

8.12.1 Updating an Employee's T&A Preferences

1. Select the employee whose preferences you want to update. You can use the location and department fields to narrow down who you're looking for. You can also type in the employee ID or name in the field.

2. Update the fields as required.

Field Name	Description
<u>"Timesheet Period"</u>	The employee's assigned timesheet period.
<u>"Timesheet Approval Path"</u>	Read-only field for the approval path that the employee's timesheet will go through.
<u>"Time Off Approval Path"</u>	Read-only field for the approval path that the employee's time off request will go through.
<u>"Overtime"</u>	The overtime rule that will apply to the employee's timesheet.
<u>"Hours Per Day"</u>	The average number of hours that this employee works per day.
<u>"Hours Per Week"</u>	The average number of hours that this employee works per week.
<u>"Holiday Calendar"</u>	The assigned holiday calendar that applies to this employee.
<u>"Default Project/Task"</u>	The default project/task that will apply to this employee's clock entries.
<u>"Assigned Shifts"</u>	The shift that this employee is assigned to.
<u>"Main Shift"</u>	The shift that this employee usually works for.
<u>"Assigned Time Off"</u>	The time off types that are assigned to this employee.

3. Click the save button to save your changes.

8.12.2 Adjusting an Employee's Time Off Balances

You can easily adjust an employee's current balances in their profile.



You can adjust the balances for assigned time off types on a per employee level. If you want to adjust balances for employees on a time off type level, please review the [Adjusting Time Off Balances for Employees](#) section.

1. Select the employee whose time off balances you want to adjust.

2. Ensure that all time off types are correctly assigned to the employee under *“Assigned Time Off”*.
3. Click the save button to save your changes.
4. Click **“Adjust Balance”** to adjust the time off balances for this employee.

5. For each time off type, you will see the name and the current balance.
6. Enter the amount that you want to adjust the type by. Enter a positive number to increase the balance or enter a negative number with a “-” symbol preceding the number to reduce the balance.

Time Off Type	Current Balance	Adjust Balance By
Vacation	-5	<input type="text" value="-5"/>
Sick Pay	0	<input type="text" value="2"/>

7. Click the refresh button if you want to reset the number back to the original current balance.
8. Click the save button to save your changes. You can also reopen to check the Audit History of all adjustments to the balances made.

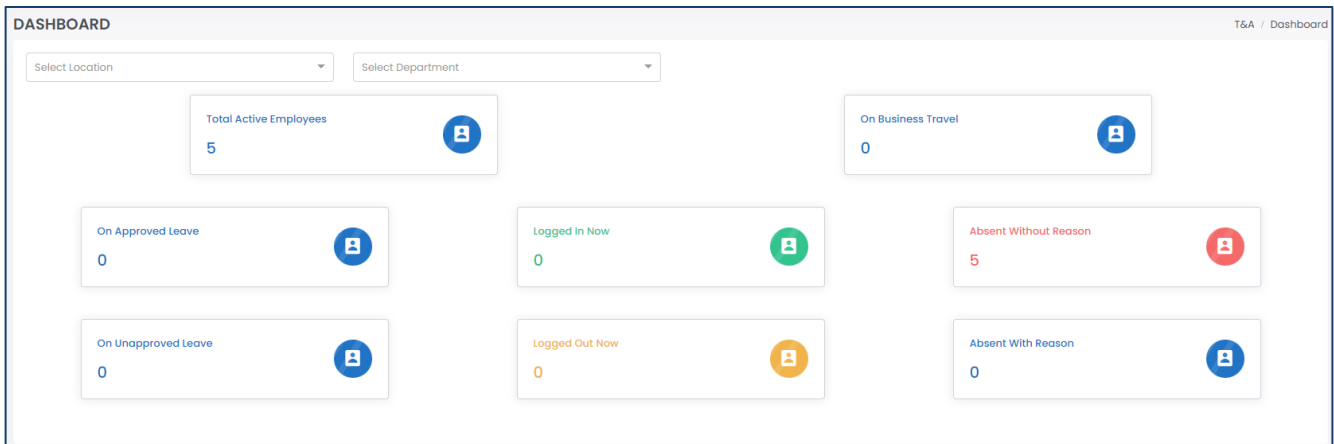
9.0 Using Harmony Time & Attendance

9.1 Dashboards

Your dashboards give you a quick summary of various aspects of your Time & Attendance module for the current date and time. All information displayed is updated in real-time. Your administrative dashboard is different than the employee dashboard.

9.1.1 Administrative Dashboard

Administrative dashboards can only be seen if your user was created by Paymate. It gives you a quick summary of the actions for all employees. You can use the location and department filters to filter the values of your dashboard. You can click each box in the dashboard to navigate to the corresponding page.



Field Name	Description
<u>"Total Employees"</u>	The total number of employees in Harmony.
<u>"On Business Travel"</u>	The number of employees who are away on business travel.
<u>"On Approved Leave"</u>	The number of employees who are away today and have an approved time off request for today.
<u>"On Unapproved Leave"</u>	The number of employees who are away today but have a rejected or pending time off request.
<u>"Logged In Now"</u>	The number of employees who have currently clocked in.
<u>"Logged Out Now"</u>	The number of employees who clocked in earlier today but have now clocked out.
<u>"Absent Without Reason"</u>	The number of employees who have not clocked in and have not entered a reason why they are not clocked in.
<u>"Absent With Reason"</u>	The number of employees who have not clocked in and have provided a reason why they have not clocked in.

9.1.2 Employee Dashboard

Employee dashboards can only be seen if your user was created within the security module of Harmony. It gives you a quick summary of your own information, including your clock entries, time off balances, and working time.











Field Name	Description
<u>"Clock Entries Today"</u>	All clock entries that you made today. The start time, end time, and project/task are listed.
<u>"Employees Working Today"</u>	If you are a manager, your subordinates who are working today.
<u>"Total Working Time"</u>	The total number of hours and minutes that you have clocked in for. By default, it is set to the current date, but you can select another date.
<u>"Assigned Shift"</u>	The shift that you are assigned to.
<u>"Time Off Balance"</u>	Your current entitlement, upcoming, used, and remaining balances for the selected time off type. Use the dropdown and refresh button to refresh the values to see your balances for a different time off type.
<u>"Upcoming Time Off"</u>	Your upcoming approved and pending approval time off, including the start date, end date, and time off type of your records. Click "+" to quickly submit a new time off request.

9.2 Clock Entries

Clock entries are each individual transaction that your employees make when they clock in and out. When clock entries are made and/or approved, they are automatically sent to their respective timesheet. You can review your clock entries by navigating to Clock Entries > All. You can review your historical clock entries in Clock Entries > History. You can also review employees who are absent by navigating to Clock Entries > Absent.

9.2.1 Exception Codes

Some clock entries may have some exception codes to indicate if there is something irregular about the clock entry. Below you will find the legend of what these exception codes mean:

Exception Code	Image	Description
ICE		"In clock early". The employee clocked in early.
ICL		"In clock late". The employee clocked in late.
ICM		"In clock missing". The employee did not clock in.
OCE		"Out clock early". The employee clocked out early.
OCL		"Out clock late". The employee clocked out late.
OCM		"Out clock missing". The employee did not clock out.
IBM		"In break missing". The employee did not take their break.
OBE		"Out break early". The employee took a shorter break.
OBL		"Out break late". The employee took a longer break.
OBM		"Out break missing". The employee is still taking their break.

9.2.2 Creating a Clock Entry

There are several ways that you can clock in and out within Harmony:

1. [Clocking In & Out with Project and Tasks](#)
2. [Clocking In & Out with a Hardware Time Clock](#)
3. [Using Harmony's Terminal Mode](#)
4. [Manually Adding a Clock Entry](#)
5. [Importing Clock Entries](#)

9.2.2.1 Clocking In & Out with Projects and Tasks

Harmony features a built-in clocking functionality that is accessible in every page and section in Harmony. It is in the top navigation bar. You must select a project/task to clock into.

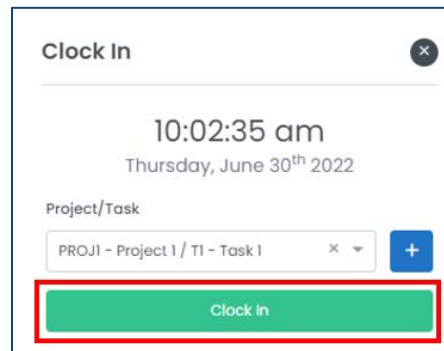
1. Open Harmony's built-in clock bar.



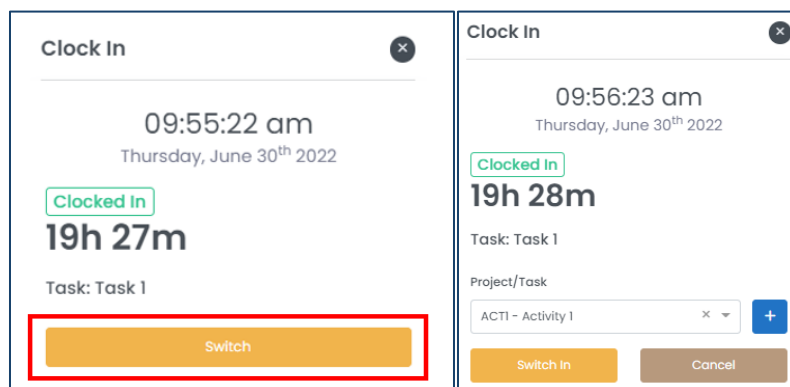
2. Select your *"Project/Task"* to clock into.
3. Click **"Clock In"** to clock into your selected project/task.



If you clock in early or late, you must enter a reason you are clocking in early/late.



4. To switch projects/tasks, click **"Switch"**. You can then select a different project/task and click **"Switch In"** to change the project/task you're working on.



5. To take a break (if eligible with your shift), click **"Break"**. You can select the break you are taking and click **"Break In"**. When you return from your break, click **"End Break"**.
6. To clock out entirely, click **"Clock Out"**.



If you clock out early or late, you must enter a reason why you are clocking out early/late.

9.2.2.2 Clocking In & Out with a Hardware Time Clock

If you are currently using a hardware time clock, in which your employees are using a card or a biometric method to clock in and out, you must set up your employees and their identification method. Refer to the *Harmony Company User Manual* for more information.

If you are using a hardware time clock that does not integrate with Harmony natively, you may export a file from the time clock and import it into Harmony. Refer to the [Importing Clock Entries](#) section for more information.

9.2.2.3 Using Harmony's Terminal Mode

Harmony features a terminal mode which functions similarly to a hardware time clock. You can set it up on any device, such as a computer or a tablet, and allow your employees to clock in with a six-digit PIN.



You must have set up the terminal mode as a prerequisite. Review the [Terminal Mode](#) section for more information.

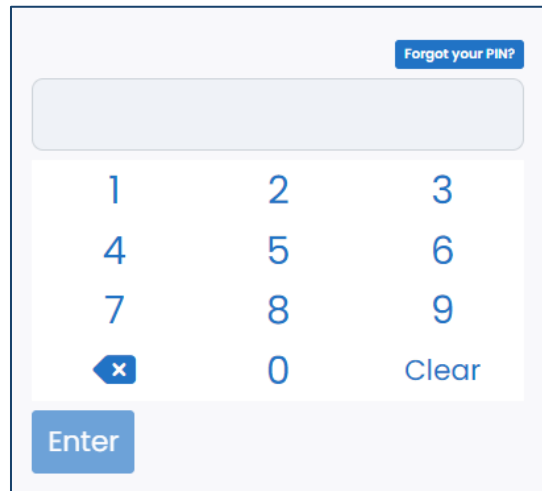
1. Navigate to Setup > Terminal.
2. Select the terminal that you want to use.
3. If you haven't already, assign the employees to be permitted to use this terminal on the right side of the window. Click **"Send PIN to Assigned Employees"** to provide the six-digit PIN to your employees.

Assign		Messages
Select Location		
Select Department		
Select Custom Group		
Search		Q
<input checked="" type="checkbox"/>	ALL (5/5)	<input type="checkbox"/>
<input checked="" type="checkbox"/>	100 - Sullivan, James	***** <input type="checkbox"/>
<input checked="" type="checkbox"/>	101 - Wazowski, Mike	***** <input type="checkbox"/>
<input checked="" type="checkbox"/>	103 - Gibbs, Boo	***** <input type="checkbox"/>
<input checked="" type="checkbox"/>	104 - Tilly, Celia	***** <input type="checkbox"/>
<input checked="" type="checkbox"/>	105 - Peterson, Roz	***** <input type="checkbox"/>

Send PIN to assigned employees

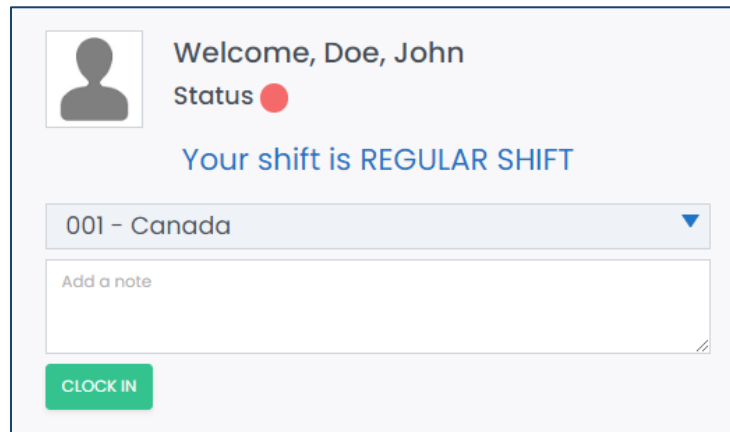
4. Copy the "URL".
5. On the device you want to set up the terminal for, open the browser and paste the "URL" that you copied. The terminal mode is now activated.

6. To clock into the terminal device, enter your six-digit PIN using the keypad.



A screenshot of a PIN entry keypad interface. At the top right, there is a link that says "Forgot your PIN?". Below this is a grey input field for the PIN. The keypad itself consists of a 3x3 grid of numbers: 1, 2, 3 in the first row; 4, 5, 6 in the second row; 7, 8, 9 in the third row. Below the numbers are three buttons: a back arrow with an 'x' icon, the number 0, and a "Clear" button. At the bottom left of the keypad area is a blue "Enter" button.

7. Click **"Clock In"**. You will be clocked into the default task that was set up in the terminal.



A screenshot of a "Clock In" confirmation screen. It features a grey profile icon placeholder on the left. To the right of the icon, the text reads "Welcome, Doe, John" and "Status" followed by a red dot. Below this, it says "Your shift is REGULAR SHIFT". There is a dropdown menu showing "001 - Canada" with a downward arrow. Below the dropdown is a text input field with the placeholder "Add a note". At the bottom left, there is a green button labeled "CLOCK IN".

8. Remember to log out!

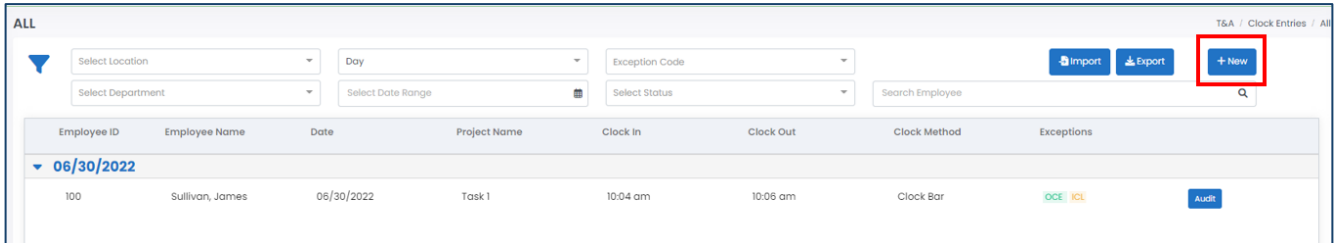
9.2.2.4 Manually Creating a Clock Entry

If you prefer for your employees or their managers to create their own clock entries, or if your employees forgot to clock in, they can manually create an entry.



If you do not require approvals for clock entries, the clock entries will automatically be sent to the timesheet. If you require approvals for clock entries, you can review them in Clock Entries > All.

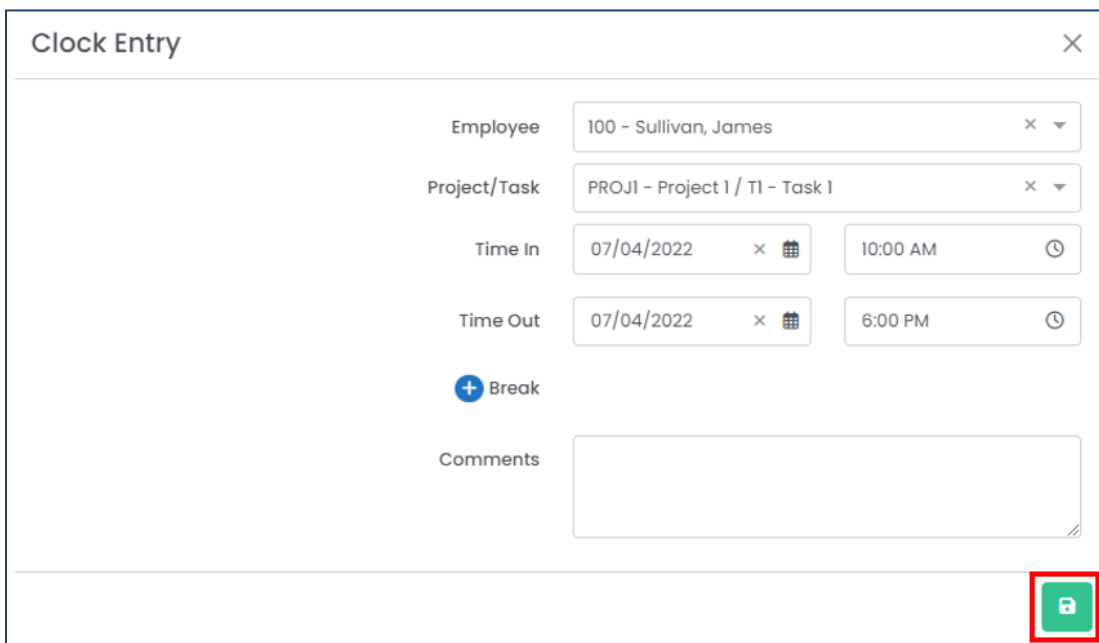
1. Click **“+ New”** to create a new clock entry.



2. Enter the required fields.

Field Name	Description
<u>“Employee”</u>	The employee for which this clock entry is for.
<u>“Project/Task”</u>	The project/task that the employee worked on.
<u>“Clock In”</u>	When the employee clocked in (date and time).
<u>“Clock Out”</u>	When the employee clocked out (date and time).
<u>“Select Break”</u>	The name of the break that the employee took.
<u>“Break In”</u>	When the employee started their break (date and time).
<u>“Break Out”</u>	When the employee finished their break (date and time).
<u>“Comments”</u>	An optional field to add additional comments for the clock entry.

3. Click the save button to save your changes.



9.2.2.5 Importing Clock Entries

Harmony lets you define custom interfaces so you can import your clock entries instead of using the other options. This is great if you are using a separate scheduling software or are tracking time worked in a spreadsheet.



You must have set up the interface correctly as a prerequisite. Review the [Import & Export Interfaces](#) section for more information.

1. Click **“Import”** to import your clock entries.

2. Select the name of the **“Interface”** that you want to use.
3. Click **“Choose File”** to browse your computer for the file that will be used to import into Harmony.
4. Click **“Import”** to finish importing your clock entries.



If you have successfully imported your clock entries, a message will appear to indicate that the import was successful. If you receive an error, there may be a mismatched field in the interface setup or your file. Be sure that your file is in the correct format (CSV or TXT depending on your interface setup) and all dates and times are in the correct format.

9.2.3 Editing a Clock Entry



You can only edit a clock entry if it was manually created, hasn't been approved, and/or if you have the permissions to do so.

1. From the list of clock entries, select the clock entry you want to edit.



If you do not see the clock entry you wanted to edit in this list, it may have already been approved if approvals are required. If approvals are not required, you will need to edit it on the timesheet. Review the [Editing a Timesheet](#) section.

Employee ID	Employee Name	Date	Project Name	Clock In	Clock Out	Clock Method	Exceptions
06/30/2022							
100	Sullivan, James	06/30/2022	Task 1	10:04 am	10:06 am	Clock Bar	OCE ICE Audit

2. Edit the fields as required.
3. Click the save button to save your changes.

Clock Entry

Employee: 100 - Sullivan, James

Project/Task: PROJ1 - Project 1 / T1 - Task 1

Clock In: 06/30/2022 11:00 AM

Clock Out: 06/30/2022 7:00 PM

+ Break

Comments:

Approve Reject Save



Any changes you make to the clock entry is recorded in the audit history. From the list of clock entries, click **"Audit"** on the corresponding row of the clock entry.

9.2.4 Deleting a Clock Entry



You can only delete a clock entry if it was manually created, hasn't been approved, and/or if you have the permissions to do so.

1. From the list of clock entries, select the clock entry you want to delete.



If you do not see the clock entry you wanted to delete in this list, it may have already been approved if approvals are required. If approvals are not required, you will need to delete it from the timesheet level. Review the [Editing a Timesheet](#) section.

2. Click the delete button to delete the clock entry.

Clock Entry

Employee: 100 - Sullivan, James

Project/Task: PROJ1 - Project 1 / T1 - Task 1

Clock In: 06/30/2022, 11:00 AM

Clock Out: 06/30/2022, 7:00 PM

+ Break

Comments

Approve Reject Delete Save

3. Harmony will ask for your confirmation that you want to delete the clock entry. Click **“Delete”** to delete the clock entry. The clock entry is now deleted.

Are you sure you want to delete this clock entry?

This action is PERMANENT and CANNOT be reverted

DELETE

CANCEL



If you accidentally deleted a clock entry, you can re-create it manually.

9.2.5 Approving or Rejecting a Clock Entry



You can only approve or reject a clock entry if you are the approver for an employee's clock entry.

1. From the list of clock entries, select the clock entry you want to approve or reject.
2. To approve this clock entry, click **“Approve”**.

The screenshot shows a 'Clock Entry' form with the following fields: Employee (100 - Sullivan, James), Project/Task (PROJ1 - Project 1 / T1 - Task 1), Clock In (06/30/2022, 11:00 AM), and Clock Out (06/30/2022, 7:00 PM). There is a '+ Break' button and a 'Comments' text area. At the bottom, there are two buttons: 'Approve' (green) and 'Reject' (red). The 'Approve' button is highlighted with a red box. To the right of these buttons are a trash icon and a lock icon.

3. To reject this clock entry, click **“Reject”**. You will need to enter a reason for the rejection.

This screenshot is identical to the previous one, showing the 'Clock Entry' form with the same fields and buttons. However, the 'Reject' button (red) is now highlighted with a red box, indicating the next step in the process.

9.2.6 Mass-Approving or Rejecting Clock Entries



You can only approve or reject a clock entry if you are the approver for an employee's clock entry.

1. Using the checkboxes next to each clock entry, tick the clock entries you want to mass-approve or mass-reject.

The screenshot shows the 'T&A / Clock Entries / All' interface. At the top, there are filters for Location, Day, Exception Code, Department, Date Range, and Status, along with 'Import', 'Export', and '+ New' buttons. A search bar for 'Search Employee' is also present. Below the filters is a table with columns: Employee ID, Employee Name, Date, Project Name, Clock In, Clock Out, Clock Method, and Exceptions. The date '06/30/2022' is expanded, showing two entries:

Employee ID	Employee Name	Date	Project Name	Clock In	Clock Out	Clock Method	Exceptions
100	Sullivan, James	06/30/2022	Task 1	11:00 am	07:00 pm	Manual Entry	IBM OCL ICL
101	Wazowski, Mike	06/30/2022	Task 1	12:53 pm	04:54 pm	Manual Entry	

At the bottom left, there are 'Approve' and 'Reject' buttons. The 'Approve' button is highlighted with a red box in the original image. At the bottom right, there are pagination controls showing '10 Per page'.

2. To approve the selected clock entries, click **“Approve”**.

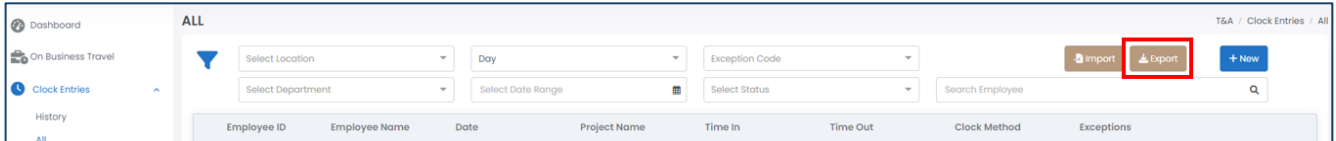
This screenshot is identical to the previous one, but the 'Approve' button at the bottom left is now highlighted with a red box, indicating the next step in the process.

3. To reject the selected clock entries, click **“Reject”**. You will need to enter a reason for the rejection.

9.2.7 Exporting Clock Entries

If you are using a different system, you can export your clock entries from Harmony and import them elsewhere.

1. Click **“Export”**.

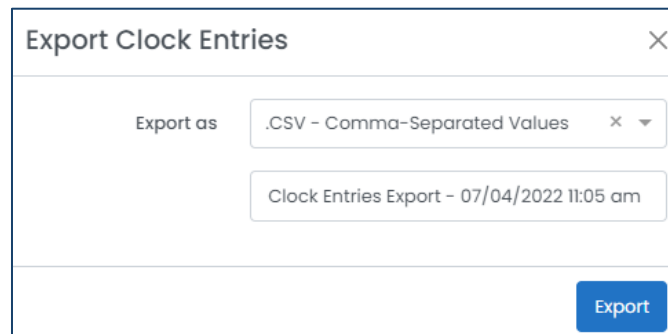


2. Select the appropriate file type that you want to export your file.



A .CSV file is a comma delimited file type. This means that your values are separated by commas. When you open a .CSV file in Excel, your values are separated in columns. A .TXT file is a plain text file and is simply a sequence of lines. If you're not sure which one to use, .CSV is typically the easiest to manage.

3. Enter the name of the file to be exported.

A screenshot of the 'Export Clock Entries' dialog box. The title bar says 'Export Clock Entries' with a close button (X). Inside the dialog, there is a label 'Export as' followed by a dropdown menu showing '.CSV - Comma-Separated Values'. Below that is a text input field containing 'Clock Entries Export - 07/04/2022 11:05 am'. At the bottom right of the dialog is a blue 'Export' button.

4. Click **“Export”** to complete the process. Your exported file will be automatically downloaded to your browser's default downloads folder.



If you're not sure where your browser's default downloads folder is, double-check your browser settings.

9.3 Timesheets

Your employees' approved clock entries and time off records will automatically be sent to their timesheets. Timesheets are what you will use to track the working time of all your employees and submitting it to payroll. You can review your employees' timesheets by navigating to Timesheets.



Only your employees' most recent timesheet will appear by default. To view historical timesheets, use the filters as necessary.

Your timesheets may look something similar to this once submitted for approval:

SUN 12/26		MON 12/27		TUE 12/28		WED 12/29		THU 12/30		FRI 12/31		Weekly Totals	
		T1 - Task 1 In: 12/27/2021 08:00 am Out: 12/27/2021 02:00 pm Total 06:00 OCE ICE		T2 - Task 2 Total 08:00		T1 - Task 1 In: 12/29/2021 09:00 am Out: 12/29/2021 05:00 pm Total 07:30		T1 - Task 1 In: 12/30/2021 12:00 pm Out: 12/30/2021 06:00 pm Total 06:00 OCL ICL				Working Time: 27:30 Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	
Total Working Time:	00:00	Total Working Time:	06:00	Total Working Time:	08:00	Total Working Time:	07:30	Total Working Time:	06:00	Total Working Time:	00:00	Timesheet Total	
Daily Overtime:	00:00	Daily Overtime:	00:00	Daily Overtime:	00:00	Daily Overtime:	00:00	Daily Overtime:	00:00	Daily Overtime:	00:00	Working Time: 27:30	
SIC - Sick Pay	00:00	SIC - Sick Pay	00:00	SIC - Sick Pay	00:00	SIC - Sick Pay	00:00	SIC - Sick Pay	00:00	SIC - Sick Pay	00:00	Overtime Time 00:00	
VAC - Vacation	00:00	VAC - Vacation	00:00	VAC - Vacation	00:00	VAC - Vacation	00:00	SIC - Sick Pay	00:00	VAC - Vacation	00:00	SIC - Sick Pay 00:00	
												VAC - Vacation 00:00	

If your timesheet period is bi-weekly, semi-monthly, or monthly, use the arrows at the top-right of the timesheet to navigate to different weeks within the timesheet.

Approved clock entries for each date will appear in columns, with the date as the header. If the clock entry was approved or if the timesheet was approved, you will not be able to modify the clock entries. You can click the view button to review the clock entry instead. You will see similar exception codes as per the [Clock Entries](#). If the timesheet has not yet been submitted and you do not require approvals for clock entries, you can add clock entries within the timesheet. Review the [Creating a Clock Entry Within a Timesheet](#) section for more information.

All working time, any automatic overtime calculation (as per your [overtime rules](#)), and time off taken will appear as a daily total at the bottom of each date, a weekly total on the right-side of the timesheet, and a timesheet total on the bottom-right corner of the timesheet.

Click the **“Approval History”** button on a pending approval, approved, or rejected timesheet to review the history of approvals for this particular timesheet.

9.3.1 Creating a Timesheet

There are three (3) ways you can create a timesheet within Harmony:

1. [Automatically creating a timesheet with existing clock entries](#)
2. [Manually creating a timesheet](#)
3. [Import a timesheet](#)

9.3.1.1 Automatically Creating a Timesheet with Existing Clock Entries

To automatically create timesheets with clock entries, navigate to your [Company Preferences](#) and tick “[Auto-Create Timesheets with Existing Clock Entries](#)”. This means that if any user navigates to Clock Entries > All and creates a clock entry, a timesheet with the corresponding period of the clock entry will automatically be created. This is a great option to use if you have many employees or require approval for your clock entries.

PREFERENCES T&A / Setup / Preferences

Default First Day Of Week	Monday	x	▼	Default Project/Task	PROJ1 - Project 1 / T1 - Task 1	x	▼
Default Timesheet For Approval Path	DEFAULT-Default	▼		Default Pay Code	I02-Hourly Wages	x	▼
Default Time Off Approval Path	DEFAULT-Default	▼		Default Shift	100-Regular Shift	x	▼
Default Timesheet Period	BiWeekly	x	▼	Default Time Off Type	VAC-Vacation	x	▼
Default Time Balance Unit	Hours	x	▼	<input type="checkbox"/> Allocate Clock In/Out According To Clock Out Day			
Default Hours Per Day	8	hours		<input checked="" type="checkbox"/> Require approvals for all clock entries			
				<input type="checkbox"/> Auto-create timesheets with existing clock entries			
				<input type="checkbox"/> Terminated Employees			

Save



Auto-creating timesheets will create them as drafts. You and your employees will still need to submit them for approval and approve of the timesheets.

9.3.1.2 Manually Creating a Timesheet

1. Click “+ New” to create a new timesheet.

TIMESHEETS T&A / Timesheets

All Locations Select Status Exception Code Import Export **+ New**

All Departments Select Date Range Search Employee

Employee ID	Employee Name	Timesheet Period	Status	Exception Codes	Export Status
-------------	---------------	------------------	--------	-----------------	---------------

2. Select the employee that you want to create a timesheet for.
3. Select the corresponding timesheet period that you want to create a timesheet for.

001 - Doe, John Timesheet Period 06/28/2022 to 07/11/2022

TUE 06/28 WED 06/29 THU 06/30 FRI 07/01 SAT 07/02 SUN 07/03 Save



Your employees can only have one timesheet per timesheet period. If the timesheet for a particular period was already approved or submitted for approval, you will not be able to create a new timesheet for the same period.

4. Click the save button to save the timesheet as a draft or click the send button to submit the timesheet for approval.

Doe, John 001 Timesheet Period 06/28/2022 to 07/11/2022

TUE 06/28	WED 06/29	THU 06/30	FRI 07/01	SAT 07/02	SUN 07/03	Weekly Totals
In: 06/28/2022 09:00 am Out: 06/28/2022 05:00 pm Total 08:00	In: 06/29/2022 08:00 am Out: 06/29/2022 04:00 pm Total 08:00	In: 06/30/2022 09:30 am Out: 06/30/2022 12:30 pm Total 03:00	In: 07/01/2022 11:00 am Out: 07/01/2022 04:30 pm Total 05:30			Working Time: 24:30 Overtime: 00:00 VAC - Vacation: 00:00
Total Working Time: 08:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 08:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 03:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 05:30 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Timesheet Total Working Time: 24:30 Overtime Time: 00:00 VAC - Vacation: 00:00

Type in a note... Approval History Send

9.3.1.3 Importing a Timesheet

Harmony lets you define custom interfaces so you can import your timesheets instead of creating them in Harmony. This is great if you are using a separate scheduling software or are tracking time worked in a spreadsheet.



You must have set up the interface correctly as a prerequisite. Review the [Import & Export Interfaces](#) section for more information.

1. Click **“Import”** to import your timesheets.

The screenshot shows the 'TIMESHEETS' page in a web application. At the top right, there are three buttons: 'Import' (highlighted with a red box), 'Export', and '+ New'. Below the buttons are several filter and search fields: 'All Locations', 'Select Status', 'Exception Code', 'All Departments', 'Select Date Range', and 'Search Employee'. At the bottom, there is a table header with columns: 'Employee ID', 'Employee Name', 'Timesheet Period', 'Status', 'Exception Codes', and 'Export Status'.

2. Select the name of the **“Interface”** that you want to use.
3. Click **“Choose File”** to browse your computer for the file that will be used to import into Harmony.
4. Click **“Import”** to finish importing your timesheets.

The screenshot shows a dialog box titled 'Import timesheets'. It has a close button (X) in the top right corner. Inside the dialog, there is a label 'Interface' followed by a dropdown menu showing 'ITSTD - Import timesheet Standard'. Below this is a 'Choose File' button and a text input field containing 'Timesheets Import.txt'. At the bottom right of the dialog, there is a blue 'Import' button, which is highlighted with a red box.



If you have successfully imported your timesheets, a message will appear to indicate that the import was successful. If you receive an error, there may be a mismatched field in the interface setup or your file. Be sure that your file is in the correct format (CSV or TXT depending on your interface setup) and all dates and times are in the correct format.

9.3.2.2 Editing a Clock Entry Within a Timesheet

1. From the list of timesheets, select the timesheet that contains the clock entry you want to edit.
2. For each clock entry, click the edit button to edit the clock entry.

Doe, John 001 Timesheet Period 06/28/2022 to 07/11/2022

TUE 06/28	WED 06/29	THU 06/30	FRI 07/01	SAT 07/02	SUN 07/03	
In: 06/28/2022 09:00 am Out: 06/28/2022 05:00 pm Total 08:00	In: 06/29/2022 08:00 am Out: 06/29/2022 04:00 pm Total 08:00	In: 06/30/2022 09:30 am Out: 06/30/2022 12:30 pm Total 03:00	In: 07/01/2022 11:00 am Out: 07/01/2022 04:30 pm Total 05:30			Weekly Totals Working Time: 24:30 Overtime: 00:00 VAC - Vacation: 00:00

3. Edit the fields as required.
4. Click the save button to save your changes.

Wednesday, June 29, 2022

Project / Task: 102 - Hourly Wages

Enter time:

Hours
 06/29/2022 8:00 AM to 06/29/2022 4:00 PM

Duration

Enter Breaks:

Break

Comment

5. Click the save button for the timesheet to save it as a draft or click the send button to submit the timesheet for approval.

Doe, John 001 Timesheet Period 06/28/2022 to 07/11/2022

TUE 06/28	WED 06/29	THU 06/30	FRI 07/01	SAT 07/02	SUN 07/03	
In: 06/28/2022 09:00 am Out: 06/28/2022 05:00 pm Total 08:00	In: 06/29/2022 08:00 am Out: 06/29/2022 04:00 pm Total 08:00	In: 06/30/2022 09:30 am Out: 06/30/2022 12:30 pm Total 03:00	In: 07/01/2022 11:00 am Out: 07/01/2022 04:30 pm Total 05:30			Weekly Totals Working Time: 24:30 Overtime: 00:00 VAC - Vacation: 00:00
Total Working Time: 08:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 08:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 03:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 05:30 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 VAC - Vacation: 00:00	Timesheet Total Working Time: 24:30 Overtime Time: 00:00 VAC - Vacation: 00:00

9.3.2.3 Deleting a Clock Entry Within a Timesheet

1. From the list of timesheets, select the timesheet that contains the clock entry you want to delete.
2. Click the edit button for the clock entry that you want to delete.

Doe, John 001						Timesheet Period 06/28/2022 to 07/11/2022	
TUE 06/28	WED 06/29	THU 06/30	FRI 07/01	SAT 07/02	SUN 07/03	Weekly Totals	
In: 06/28/2022 09:00 am Out: 06/28/2022 05:00 pm Total 08:00	In: 06/29/2022 08:00 am Out: 06/29/2022 04:00 pm Total 08:00	In: 06/30/2022 09:30 am Out: 06/30/2022 12:30 pm Total 03:00	In: 07/01/2022 11:00 am Out: 07/01/2022 04:30 pm Total 05:30			Working Time: 24:30 Overtime: 00:00 VAC - Vacation 00:00	

3. Click the delete button to delete the clock entry.

Wednesday, June 29, 2022

Project / Task: 102 - Hourly Wages

Enter time:

Hours

06/29/2022 8:00 AM to 06/29/2022 4:00 PM

Duration

Enter Breaks:

Break

Comment

4. Harmony will ask for your confirmation that you want to delete the clock entry. Click **“Delete”** to delete the clock entry. The clock entry is now deleted.

Are you sure you want to delete this clock entry?

This action is PERMANENT and CANNOT be reverted



If you accidentally deleted a clock entry, you can re-create it manually if you do not require approvals for clock entries.

9.3.3 Deleting a Timesheet



You cannot delete a timesheet if it is already approved or pending approval. You must first reject the timesheet.

1. From the list of timesheets, select the timesheet you want to delete.
2. Click the delete button to delete the timesheet.

Doe, John 001 Timesheet Period 06/28/2022 to 07/11/2022

TUE 06/28	WED 06/29	THU 06/30	FRI 07/01	SAT 07/02	SUN 07/03	
In: 06/28/2022 09:00 am Out: 06/28/2022 05:00 pm Total 08:00	In: 06/29/2022 08:00 am Out: 06/29/2022 04:00 pm Total 08:00	In: 06/30/2022 09:30 am Out: 06/30/2022 12:30 pm Total 03:00	In: 07/01/2022 11:00 am Out: 07/01/2022 04:30 pm Total 05:30			Weekly Totals Working Time: 24:30 Overtime: 00:00 VAC - Vacation 00:00
+ + + + +						
Total Working Time: 08:00 Daily Overtime: 00:00 VAC - Vacation 00:00	Total Working Time: 08:00 Daily Overtime: 00:00 VAC - Vacation 00:00	Total Working Time: 03:00 Daily Overtime: 00:00 VAC - Vacation 00:00	Total Working Time: 05:30 Daily Overtime: 00:00 VAC - Vacation 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 VAC - Vacation 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 VAC - Vacation 00:00	Timesheet Total Working Time: 24:30 Overtime Time 00:00 VAC - Vacation 00:00

Approval History

3. Harmony will ask for your confirmation that you want to delete the clock timesheet. Click **“Delete”** to delete the timesheet. The timesheet is now deleted.

Are you sure you want to delete this timesheet?

This action is PERMANENT and CANNOT be reverted

DELETE CANCEL



If you accidentally deleted a timesheet, you can re-create it manually.

9.3.4 Approving or Rejecting a Timesheet



You can only approve or reject a timesheet if you are the approver for an employee's timesheet.

1. From the list of timesheets, select the timesheet you want to approve or reject.
2. To approve this timesheet, click **"Approve"**.

Sullivan, James 100 Timesheet Period 12-26-2021 to 01-08-2022

SUN 12/26	MON 12/27	TUE 12/28	WED 12/29	THU 12/30	FRI 12/31	
	T1 - Task 1 In: 12/27/2021 08:00 am Out: 12/27/2021 02:00 pm Total 06:00 OCE ICE	T2 - Task 2 Total 08:00	T1 - Task 1 In: 12/29/2021 09:00 am Out: 12/29/2021 05:00 pm Total 07:30	T1 - Task 1 In: 12/30/2021 12:00 pm Out: 12/30/2021 06:00 pm Total 06:00 OCL ICL		Weekly Totals Working Time: 27:30 Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00
Total Working Time: 00:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 06:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 08:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 07:30 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 06:00 Daily Overtime: 00:00 VAC - Vacation 00:00 SIC - Sick Pay 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Timesheet Total Working Time: 27:30 Overtime Time 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00
Approval History <input type="text" value="Type in a note..."/>						<input type="button" value="Approve"/> <input type="button" value="Reject"/>

3. To reject this timesheet, click **"Reject"**. You will need to enter a reason for the rejection.

Sullivan, James 100 Timesheet Period 12-26-2021 to 01-08-2022

SUN 12/26	MON 12/27	TUE 12/28	WED 12/29	THU 12/30	FRI 12/31	
	T1 - Task 1 In: 12/27/2021 08:00 am Out: 12/27/2021 02:00 pm Total 06:00 OCE ICE	T2 - Task 2 Total 08:00	T1 - Task 1 In: 12/29/2021 09:00 am Out: 12/29/2021 05:00 pm Total 07:30	T1 - Task 1 In: 12/30/2021 12:00 pm Out: 12/30/2021 06:00 pm Total 06:00 OCL ICL		Weekly Totals Working Time: 27:30 Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00
Total Working Time: 00:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 06:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 08:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 07:30 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Total Working Time: 06:00 Daily Overtime: 00:00 VAC - Vacation 00:00 SIC - Sick Pay 00:00	Total Working Time: 00:00 Daily Overtime: 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00	Timesheet Total Working Time: 27:30 Overtime Time 00:00 SIC - Sick Pay 00:00 VAC - Vacation 00:00
Approval History <input type="text" value="Type in a note..."/>						<input type="button" value="Approve"/> <input type="button" value="Reject"/>

9.3.5 Mass-Approving or Rejecting Timesheets



You can only approve or reject a timesheet if you are the approver for an employee's timesheet.

1. Using the checkboxes next to each timesheet, tick the timesheets you want to mass-approve or mass-reject.

<input checked="" type="checkbox"/>	Employee ID	Employee Name	Timesheet Period
<input checked="" type="checkbox"/>	103	Gibbs, Boo	01-23-2022 to 02-05-2022
<input checked="" type="checkbox"/>	100	Sullivan, James	12-26-2021 to 01-08-2022

✓ Approve ✗ Reject

2. To approve the selected timesheets, click **“Approve”**.

<input checked="" type="checkbox"/>	Employee ID	Employee Name	Timesheet Period
<input checked="" type="checkbox"/>	103	Gibbs, Boo	01-23-2022 to 02-05-2022
<input checked="" type="checkbox"/>	100	Sullivan, James	12-26-2021 to 01-08-2022

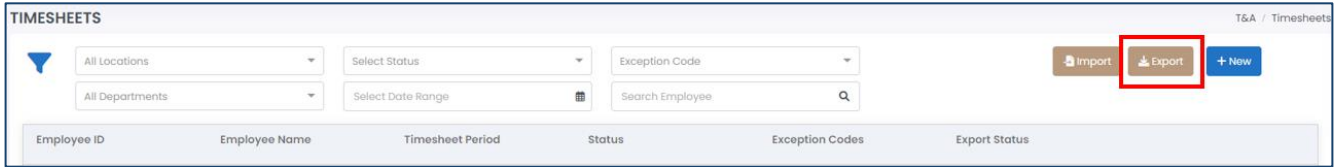
✓ Approve ✗ Reject

3. To reject the selected timesheets, click **“Reject”**. You will need to enter a reason for the rejection.

9.3.6 Exporting Timesheets

If you are using a different system, you can export your timesheets from Harmony and import them elsewhere.

1. Click **“Export”**.



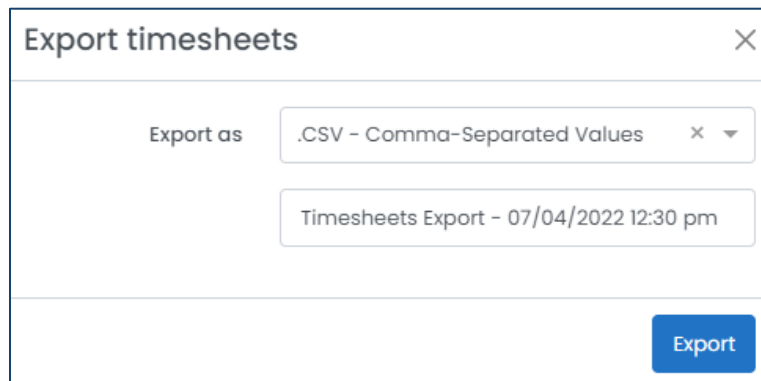
The screenshot shows the 'TIMESHEETS' interface. At the top right, there are three buttons: 'Import', 'Export', and '+ New'. The 'Export' button is highlighted with a red box. Below the buttons are several filters: 'All Locations', 'Select Status', 'Exception Code', 'All Departments', 'Select Date Range', and 'Search Employee'. Below the filters is a table header with columns: 'Employee ID', 'Employee Name', 'Timesheet Period', 'Status', 'Exception Codes', and 'Export Status'.

2. Select the appropriate file type that you want to export your file.



A .CSV file is a comma delimited file type. This means that your values are separated by commas. When you open a .CSV file in Excel, your values are separated in columns. A .TXT file is a plain text file and is simply a sequence of lines. If you're not sure which one to use, .CSV is typically the easiest to manage.

3. Enter the name of the file to be exported.



The screenshot shows a dialog box titled 'Export timesheets'. It has a close button (X) in the top right corner. Inside the dialog, there is a label 'Export as' followed by a dropdown menu showing '.CSV - Comma-Separated Values'. Below that is a text input field containing 'Timesheets Export - 07/04/2022 12:30 pm'. At the bottom right of the dialog is a blue 'Export' button.

4. Click **“Export”** to complete the process. Your exported file will be automatically downloaded to your browser's default downloads folder.



If you're not sure where your browser's default downloads folder is, double-check your browser settings.

9.4 Shifts

Your shifts section provides information about the available and assigned shifts in your company. You can review the assigned shifts by navigating to Shifts.

SHIFTS T&A / Shifts

Select Location Select Department Select Shift Type

Search Employee

Shift Code	Shift Name	Location	Number of Employees
100	Regular Shift	Canada	2
200	Part Time Shift	Canada	3
101	Reg Shift	Canada	0



Use the filters and search bar to search for a particular employee.

1. Click on a shift to view a list of employees who are assigned to the selected shift.

Regular Shift ✕

Canada

Employee ID	Employee Name
100	Sullivan, James
105	Peterson, Roz



You can sort this list of employees by clicking the headers!

9.5 Time Off / PTO / Absences

You and your employees' time off can be requested, cancelled, approved, rejected, and reviewed. You can review your time off records in Time Off. Historical records can be viewed in Time Off > History.

9.5.1 Time Off Calendar

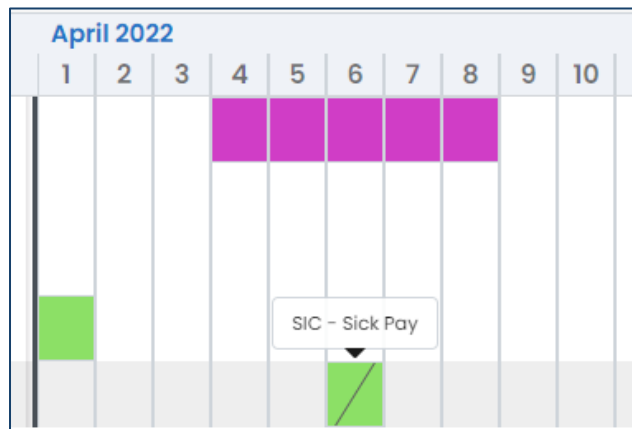
All approved time off records, if allowed, will be displayed in the time off calendar. Different colors will indicate different time off types, according to what you have set up in your [time off types setup](#).

The screenshot shows the 'CALENDAR' interface for April 2022. It includes filters for Location, Department, and Time Off Types, along with a search bar for employees. The main area is a calendar grid with columns for days 1 through 30. Employees listed are Sullivan, James (ID 100); Wazowski, Mike (ID 101); Gibbs, Boo (ID 103); Tilly, Celia (ID 104); and Peterson, Roz (ID 105). Time off blocks are shown in purple (e.g., Sullivan from 4-8, Wazowski on 20, Peterson from 25-29) and green (e.g., Tilly on 1, Peterson on 6).

1. Navigate to Time Off > Calendar.
2. Click on an employee to view their balance. You can change review their balances for different time off types using the dropdown provided.

The screenshot shows the 'SULLIVAN, JAMES' employee view. It features a dropdown menu set to 'VAC - Vacation'. Below are four summary cards: 'Total Entitlement' (0), 'Upcoming' (0), 'Used' (5), and 'Remaining' (-5).

3. Return to the calendar and hover over a color block in the calendar to view which time off type it is.



- Click on the color block to view the time off request in detail. You can also click the **“Approval History”** button to review when the request was submitted and approved.

Sequence	Name	Status	Comments
1	Sullivan, James	Submitted on 04-11-2022	
1	Sullivan, James	Approved on 04-11-2022	

- To reject this approved request, click **“Reject”**. You will need to provide a reason for this rejection. If this was your time off request, you can also click **“Request Cancellation”** to cancel the request.

Sullivan, James

100
Assigned Shifts: 100

Leave Type: VAC - Vacation

Partial Day?

From: 04/04/2022

To: 04/08/2022

Comments:

Approval History

Applied: 4 Used: 5 Remaining: -5

Total Entitlement: 0

Reject Request Cancellation



If you are cancelling a request, the approver of your time off must acknowledge the cancellation and ‘approve’ of the cancellation. If the approver does not approve, the time off request will remain approved.

9.5.2 Creating a Time Off Request

With the correct permissions, you can request time off for yourself or on behalf of a different employee.

1. Navigate to Time Off > Calendar or Time Off > Requests.
2. Click **“+ New”** to create a new time off request.

The screenshot shows the 'CALENDAR' interface. It includes a filter menu on the left, three dropdown menus for 'Select Location', 'Select Department', and 'Select Time Off Types', a date selector for 'July' and '2022', a search bar for 'Search Employee', and a blue '+ New' button highlighted with a red box.

The screenshot shows the 'REQUESTS' interface. It includes a filter menu on the left, three dropdown menus for 'Select Location', 'Select Department', and 'Select Time Off Types', a search bar for 'Search Employee', and a blue '+ New' button highlighted with a red box. Below the filters is a table header with columns: Requested Date, Employee ID, Employee Name, Time Off Period, Time Off Type, and Requested By.

3. Enter all required fields.

Field Name	Description
<u>“Request For”</u>	Identifies who the request is for – either yourself or on behalf of someone else.
<u>“Leave Type”</u>	Identifies which time off type is used.
<u>“Partial Day?”</u>	Identifies if this request is a partial day or not. If yes, you will be required to enter the number of hours per day. This option is only available if the select time off type is in ‘days’.
<u>“From”</u>	If the time off type is in ‘days’, identifies the first date of the request.
<u>“To”</u>	If the time off type is in ‘days’, identifies the last date of the request.
<u>“Day(s)”</u>	If the time off type is in ‘hours’, identifies the date of the request.
<u>“Hours”</u>	Identifies the number of hours per day that relates to the request.
<u>“Comments”</u>	An optional field to enter any comments for the request.

The screenshot shows the time off request form. It includes the following fields: 'Request For' (My Self), 'Assigned Shifts' (100), 'Leave Type' (VAC - Vacation), 'Partial Day?' (toggle off), 'From' (07/01/2022), 'To' (07/01/2022), and 'Comments' (empty text area). On the right, there is a summary of entitlements: 'Total Entitlement' (0), 'Applied' (1), 'Used' (5), and 'Remaining' (-5). A blue send button is located at the bottom right.

4. Click the send button to submit your time off request.

9.5.3 Cancelling a Time Off Request

If your plans change, you can cancel your own time off request. With the correct permissions, you may be able to request a cancellation of a time off request on behalf of someone else.



Cancelling a time off request in a timesheet period in which the timesheet was already approved will revert the timesheet status back to 'draft'. The timesheet must be re-submitted for approval.

1. Navigate to Time Off > History.
2. Select the time off record that you want to cancel.



Use the filters provided to easily find the request you are looking to cancel!

3. Click **"Request Cancellation"** to cancel your time off request.

Total Entitlement		
0		

Applied	Used	Remaining
4	5	-5

Buttons: [Approval History](#) [Request Cancellation](#)



To cancel a time off request, the approver of your time off must acknowledge the cancellation and 'approve' of the cancellation. If the approver does not approve, the time off request will remain approved.

9.5.4 Approving or Rejecting a Time Off Request



You can only approve or reject a time off if you are the approver for an employee's time off.

1. Navigate to Time Off > Requests.
2. Select the time off request you want to approve or reject.

REQUESTS							T&A / Time Off / Requests			
Select Location							Select Department	Select Time Off Types	Search Employee	+ New
<input type="checkbox"/>	Requested Date	Employee ID	Employee Name	Time Off Period	Time Off Type	Requested By				
<input type="checkbox"/>	04/11/2022 06:41 pm	101	Wazowski, Mike	04/04/2022	Sick Pay	Sullivan, James				
<input type="checkbox"/>	04/11/2022 06:40 pm	100	Sullivan, James	04/12/2022	Sick Pay	Sullivan, James				
<input type="checkbox"/>	04/12/2022 01:57 pm	101	Wazowski, Mike	04/05/2022	Sick Pay	Sullivan, James				
<input type="checkbox"/>	04/11/2022 08:48 pm	105	Peterson, Roz	04/07/2022	Sick Pay	Sullivan, James				
<input type="checkbox"/>	04/13/2022 07:39 pm	105	Peterson, Roz	04/29/2022 to 04/29/2022	Vacation	Sullivan, James				

3. To approve the time off request, click **“Approve”**.

Peterson, Roz

105

Assigned Shifts: 100

Leave Type: VAC - Vacation

Partial Day?

From: 04/29/2022

To: 04/29/2022

Comments

Approval History

Total Entitlement: 0

Applied: 1

Used: 4

Remaining: -4

Approve **Reject**

4. To reject the time off request, click **“Reject”**. You will be required to enter a reason for the rejection.

9.5.5 Mass-Approving or Rejecting a Time Off Request



You can only approve or reject a time off if you are the approver for an employee's time off.

1. Using the checkboxes next to each time off request, tick the requests you want to mass-approve or mass-reject.

REQUESTS T&A / Time Off / Requests

Select Location Select Department Select Time Off Types Search Employee

<input type="checkbox"/>	Requested Date	Employee ID	Employee Name	Time Off Period	Time Off Type	Requested By
<input checked="" type="checkbox"/>	04/11/2022 06:41 pm	101	Wazowski, Mike	04/04/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/11/2022 06:40 pm	100	Sullivan, James	04/12/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/12/2022 01:57 pm	101	Wazowski, Mike	04/05/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/11/2022 08:49 pm	105	Peterson, Roz	04/07/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/13/2022 07:39 pm	105	Peterson, Roz	04/29/2022 to 04/29/2022	Vacation	Sullivan, James

1 10 Per page

2. To approve the selected time off requests, click **“Approve”**.

REQUESTS T&A / Time Off / Requests

Select Location Select Department Select Time Off Types Search Employee

<input checked="" type="checkbox"/>	Requested Date	Employee ID	Employee Name	Time Off Period	Time Off Type	Requested By
<input checked="" type="checkbox"/>	04/11/2022 06:41 pm	101	Wazowski, Mike	04/04/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/11/2022 06:40 pm	100	Sullivan, James	04/12/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/12/2022 01:57 pm	101	Wazowski, Mike	04/05/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/11/2022 08:49 pm	105	Peterson, Roz	04/07/2022	Sick Pay	Sullivan, James
<input checked="" type="checkbox"/>	04/13/2022 07:39 pm	105	Peterson, Roz	04/29/2022 to 04/29/2022	Vacation	Sullivan, James

1 10 Per page

3. To reject the selected time off requests, click **“Reject”**. You will need to enter a reason for the rejection.

9.6 Reporting

Harmony provides you with dynamic reporting and analytics in your Time & Attendance module. This means that while Harmony will provide you with all the standard reports, you can customize how you want your reports to be displayed and saved. You can review your reports by navigating to Reports.

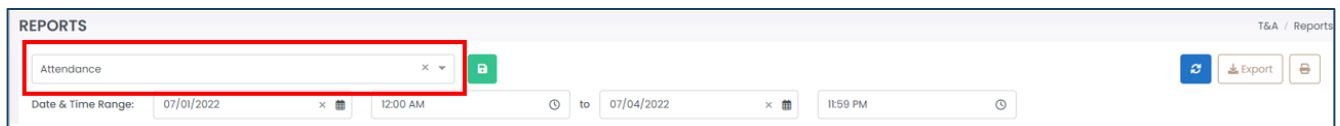
9.6.1 Available Reports

The reports below are the standard reports that come preloaded with Harmony Time & Attendance. Each report has its own fields that you can move, group, sort, or filter.

Report Name	Description
<i>Annual Exceptions</i>	Provides annual information about the expected and actual start/end times with exception codes.
<i>Attendance</i>	Provides information that compare actual start/end times of your employees and their expected start/end times of their assigned shifts. Exception codes are also included.
<i>Attendance Count</i>	Identifies the number of absences and clock entries per employee.
<i>Clock Entries</i>	Provides information about the clock entries in the system, such as who clocked in, what project/task they clocked in with, how they clocked in, and more.
<i>Exceptions</i>	Provides a comparison between the expected and actual start/end times with exception codes to identify if your employees were early, late, or absent.
<i>Pending Time Off Requests</i>	Identifies all time off requests that are pending approval.
<i>Time Off Balances</i>	Provides you with quick information about the current time off balances for all employees.
<i>Time Off Requests History</i>	Identifies all approved, pending, rejected, and cancelled time off requests.

9.6.2 Opening a Report

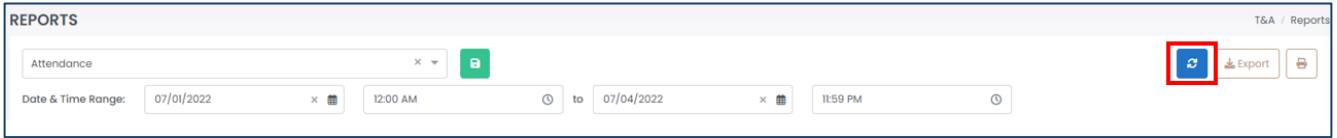
1. In the dropdown field, select the report that you want to view.



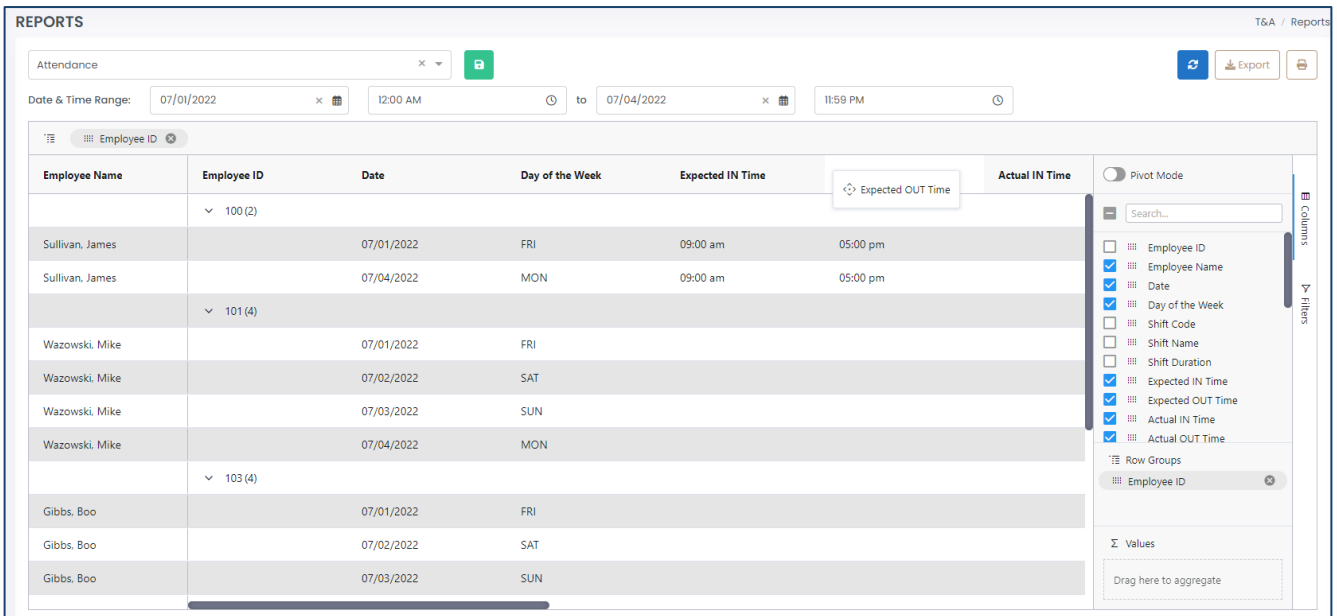
The screenshot shows the 'REPORTS' section of the Harmony interface. A dropdown menu is open, displaying 'Attendance' as the selected report. Below the dropdown, the 'Date & Time Range' is set from '07/01/2022 12:00 AM' to '07/04/2022 11:59 PM'. The interface includes an 'Export' button and a 'T&A / Reports' breadcrumb.

9.6.3 Editing a Report

1. In the dropdown field, select the report that you want to modify.
2. Each report will have different filters available. Use the filters and click the refresh button to confirm your filters.

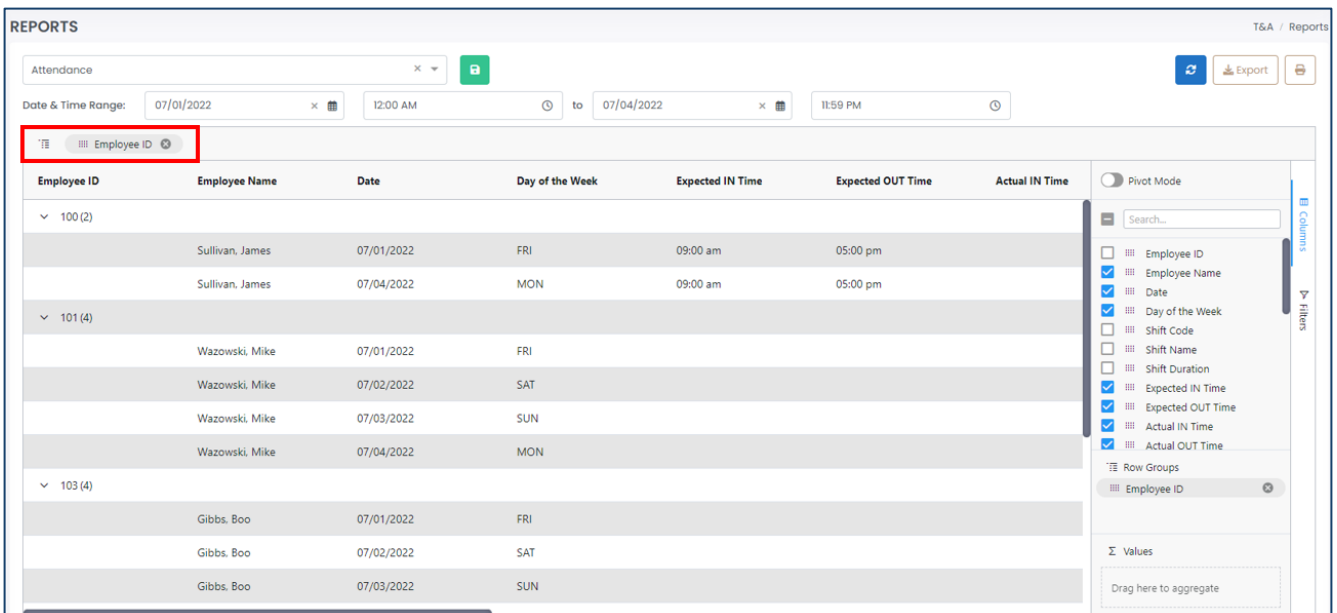


3. Drag and drop the columns according to how you want them to be displayed.



Employee Name	Employee ID	Date	Day of the Week	Expected IN Time	Expected OUT Time	Actual IN Time
Employee ID: 100 (2)						
Sullivan, James		07/01/2022	FRI	09:00 am	05:00 pm	
Sullivan, James		07/04/2022	MON	09:00 am	05:00 pm	
Employee ID: 101 (4)						
Wazowski, Mike		07/01/2022	FRI			
Wazowski, Mike		07/02/2022	SAT			
Wazowski, Mike		07/03/2022	SUN			
Wazowski, Mike		07/04/2022	MON			
Employee ID: 103 (4)						
Gibbs, Boo		07/01/2022	FRI			
Gibbs, Boo		07/02/2022	SAT			
Gibbs, Boo		07/03/2022	SUN			

4. Drag any field to the 'Row Group' section to group your report by the selected field.



Employee ID	Employee Name	Date	Day of the Week	Expected IN Time	Expected OUT Time	Actual IN Time
Employee ID: 100 (2)						
	Sullivan, James	07/01/2022	FRI	09:00 am	05:00 pm	
	Sullivan, James	07/04/2022	MON	09:00 am	05:00 pm	
Employee ID: 101 (4)						
	Wazowski, Mike	07/01/2022	FRI			
	Wazowski, Mike	07/02/2022	SAT			
	Wazowski, Mike	07/03/2022	SUN			
	Wazowski, Mike	07/04/2022	MON			
Employee ID: 103 (4)						
	Gibbs, Boo	07/01/2022	FRI			
	Gibbs, Boo	07/02/2022	SAT			
	Gibbs, Boo	07/03/2022	SUN			

- To show/hide any fields, click **“Columns”** on the far-right side to display all available fields. Tick the fields that you want to be shown and untick the fields that you want to hide.

The screenshot shows the 'REPORTS' interface for an attendance report. The report is filtered by 'Attendance' and shows data for the date range 07/01/2022 to 07/04/2022. The data is grouped by Employee ID (100, 101, 103). The 'Columns' panel on the right is open, showing a list of fields with checkboxes to show or hide them. The fields listed are: Employee ID, Employee Name, Date, Day of the Week, Shift Code, Shift Name, Shift Duration, Expected IN Time, Expected OUT Time, Actual IN Time, and Actual OUT Time. The 'Columns' panel also includes a search bar, a 'Pivot Mode' toggle, and a 'Row Groups' section.

Employee ID	Employee Name	Date	Day of the Week	Expected IN Time	Expected OUT Time	Actual IN Time
100 (2)	Sullivan, James	07/01/2022	FRI	09:00 am	05:00 pm	
	Sullivan, James	07/04/2022	MON	09:00 am	05:00 pm	
101 (4)	Wazowski, Mike	07/01/2022	FRI			
	Wazowski, Mike	07/02/2022	SAT			
	Wazowski, Mike	07/03/2022	SUN			
	Wazowski, Mike	07/04/2022	MON			
103 (4)	Gibbs, Boo	07/01/2022	FRI			
	Gibbs, Boo	07/02/2022	SAT			
	Gibbs, Boo	07/03/2022	SUN			

- To filter or pin any columns, hover over the column and click the hamburger menu. This will open up a small window to allow you to pin columns to the left or right, auto-size columns, filter the column, etc.

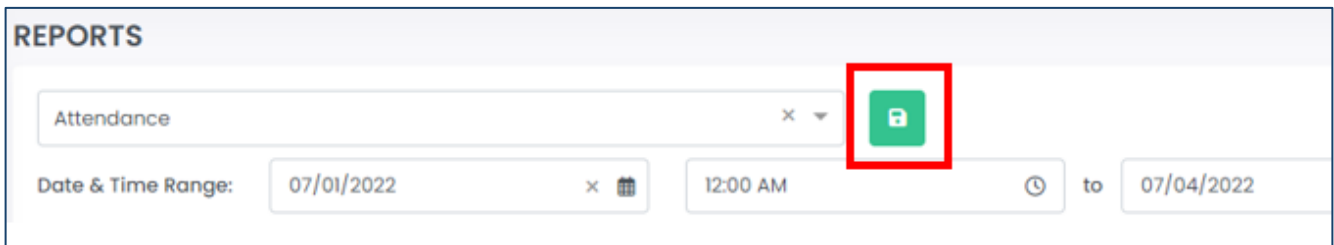
The screenshot shows the 'REPORTS' interface with a context menu open over the 'Day of the Week' column header. The menu includes the following options: Pin Column, Autosize This Column, Autosize All Columns, Group by Employee Name, Reset Columns, Expand All, and Collapse All. The report data is the same as in the previous screenshot.

Employee ID	Employee Name	Day of the Week
100 (2)	Sullivan, James	FRI
	Sullivan, James	MON
101 (4)	Wazowski, Mike	FRI
	Wazowski, Mike	SAT
	Wazowski, Mike	SUN
	Wazowski, Mike	MON

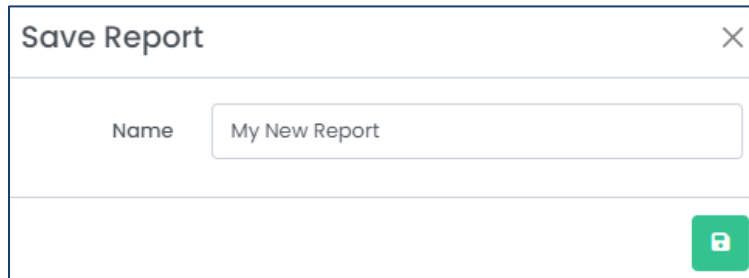
9.6.4 Saving a Report

Once you have manipulated or edited a report that you want to save for quick access in the future, you can save it under a customized name to easily help you identify it.

1. Ensure that the report being displayed is exactly how you want it. Review the [Editing a Report](#) section for more information.
2. Click the save button.



3. Enter a name for your report.



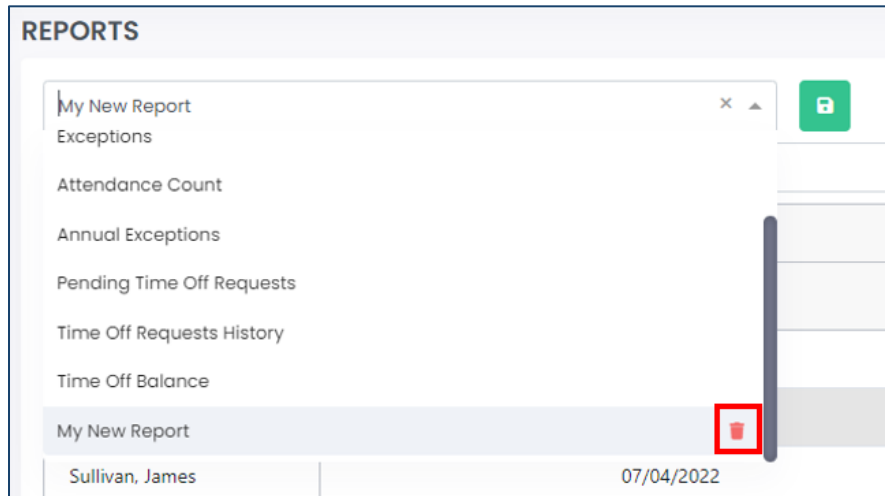
4. Click the save button to save your changes.

9.6.5 Deleting a Report

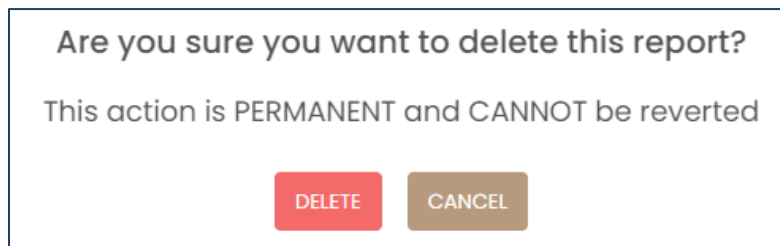


You can only delete a report that you've created. You cannot delete a report that another user created, and you cannot delete the standard reports that are provided for you.

1. In the list of reports, identify the report that you want to delete.
2. Click the delete button to delete the report.



3. Harmony will ask for your confirmation that you want to delete the clock report. Click **“Delete”** to delete the report. The report is now deleted.

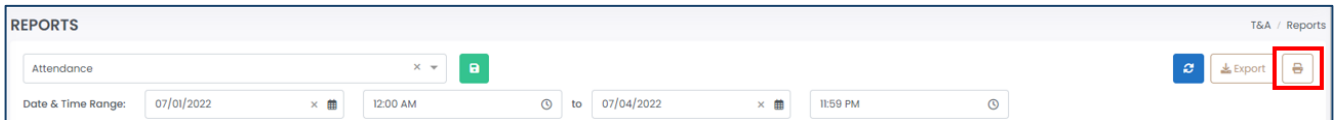


If you accidentally deleted a report, you can re-create it manually.

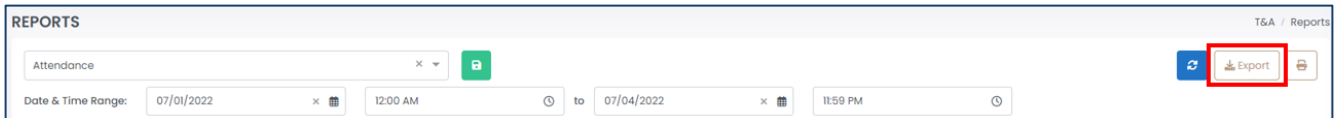
9.6.6 Exporting a Report

For all reports, you can print them out to retain for your records or export them in a CSV or Excel file for further manipulation.

1. Select the report that you want to export.
2. To print out the report, click the print button. The report will open in a new tab and you can use your browser's printer settings to print out the report.



3. To export the report digitally, click the **“Export”** button. Select the file type you want to export it as and the file will be downloaded to your browser's default downloads folder.



If you're not sure where your browser's default downloads folder is, double-check your browser settings.

Contact Paymate Support

Before you contact the Paymate support team directly, please review our available resources.

Paymate Knowledge Base

Paymate's knowledge base contains a wide variety of help documents, guides, and how-to videos. We strongly recommend browsing or reviewing our articles to fix an issue you may have with Harmony.

You can access Paymate's knowledge base here: <https://helpdesk.paymatesoftware.com/>

Paymate's YouTube Channel

Paymate's YouTube channel contains several videos on a variety of topics. From software demos to step-by-step guides on how to close your year in Harmony, you can refer to these videos for a step-by-step explanation for the solution to an issue you may have.

You can access Paymate's YouTube channel here:

https://www.youtube.com/channel/UCzQF_VMF_5DiNdUtlaanMbA

If you still require additional help with Harmony, please feel free to contact the Paymate support team directly. We will be happy to help you and answer any questions you may have.

Email Us: support@paymatesoftware.com
Call Us: 1-866-PAYMATE (1-866-729-6283) ext. 1
Visit Us: www.paymatesoftware.com

