HARMONY

TIME & ATTENDANCE
EMPLOYEE USER MANUAL

harmony

V.1.2

PAYMATE SOFTWARE CORPORATION
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payroll & HR made easy

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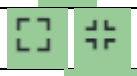
Common Icons and Symbols

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.
	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 this2 button to view available filters for the data on the page.
	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.
"Radio"	Radio field options that can be selected will be italicized and in double quotation marks.
"Field"	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

In this user manual are instructions and guides on how to navigate and use Harmony T&A. For the configuration of Harmony as a general application, please be sure to review the *Harmony Company Setup User Manual*.

Due to the nature of Harmony T&A, there are other manuals available. Please refer to Paymate's knowledge base for the administrative user manual and manager user manual.

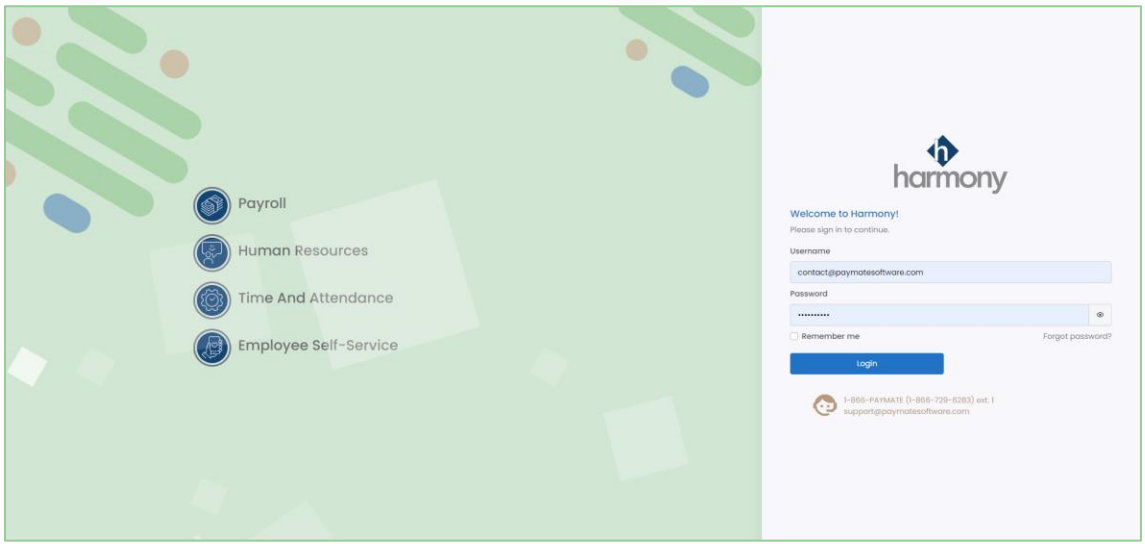
Software Version

v1.3.9-2022-06-29

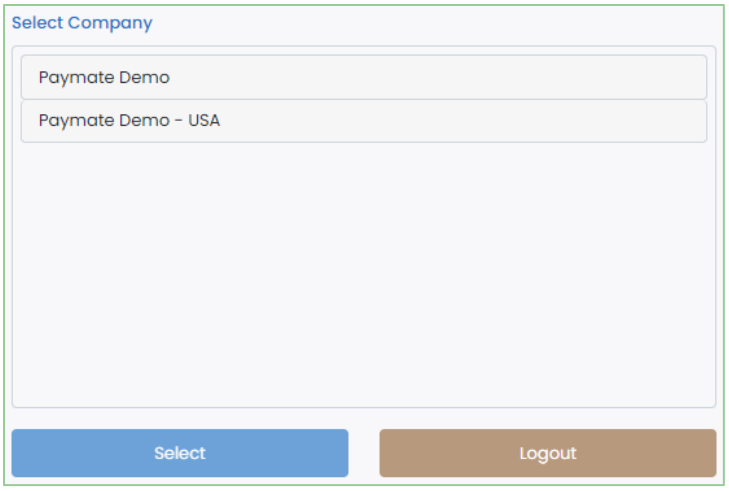
Logging In

Your system administrator will provide you with your user credentials and URL to access Harmony. These credentials belong to your own account and may have restricted permissions.

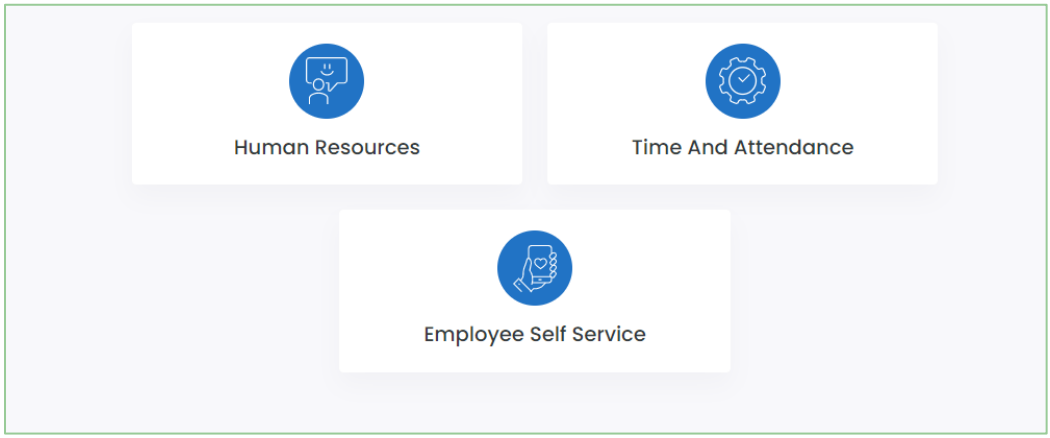
1. Copy the Harmony URL that was provided to you.
2. Open your web browser and paste the URL to navigate to Harmony.
3. Enter your credentials.
4. Click **"Login"**.



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



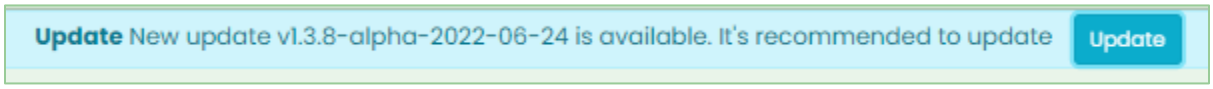
7. Select the Time & Attendance module.



Depending on what modules were purchased, the modules shown on the module selection screen may differ from the screenshot provided above.

Upgrading Your Database

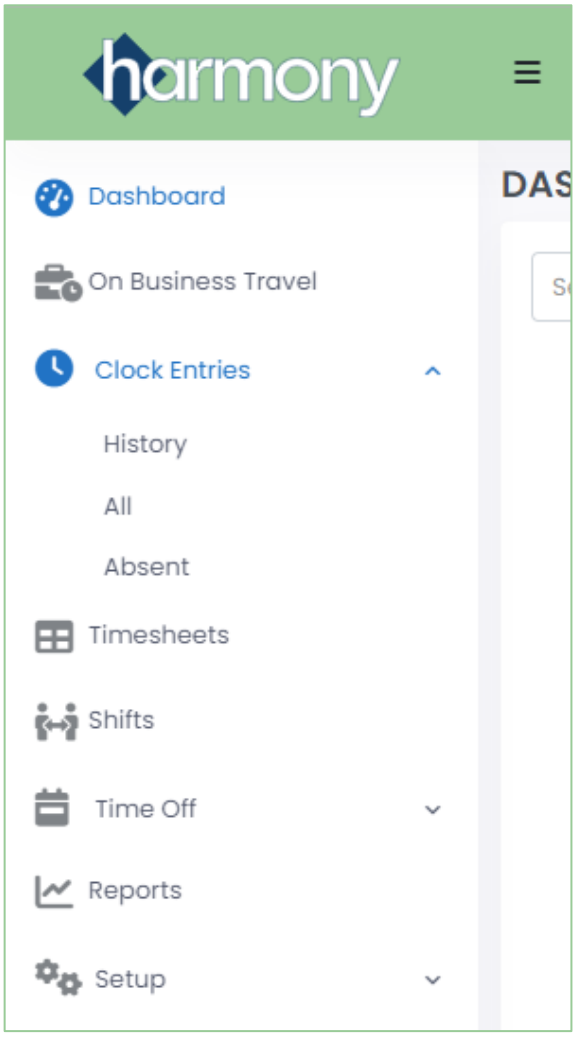
Because Harmony is hosted on Microsoft Azure, you will receive notifications when there are new updates available. When a new version of Harmony is available, you will receive a message that prompts you to update your company database version upon logging in. Just click **"Update"** and Harmony will update your database automatically.

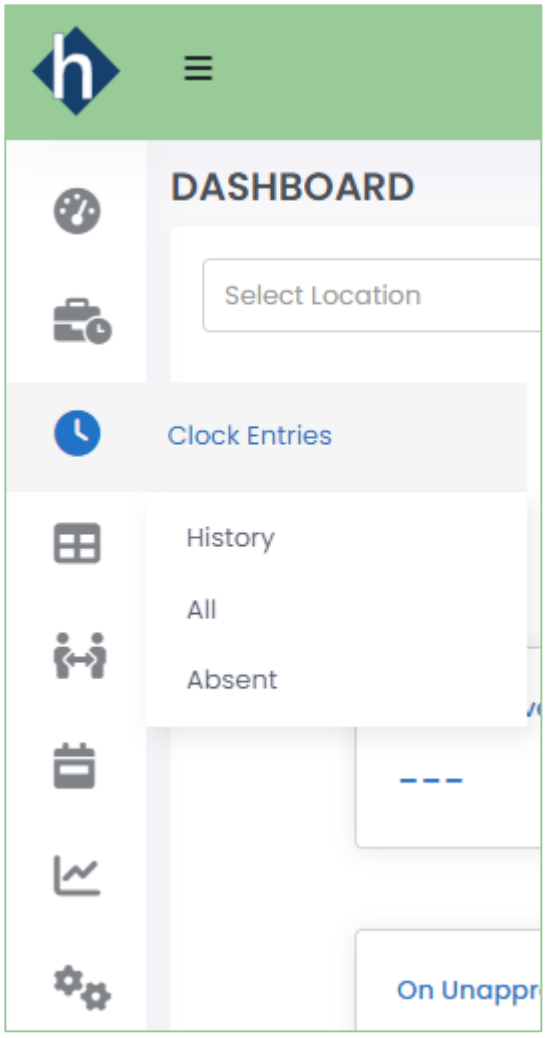


Navigating Through Harmony T&A

Navigating around Harmony T&A 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.

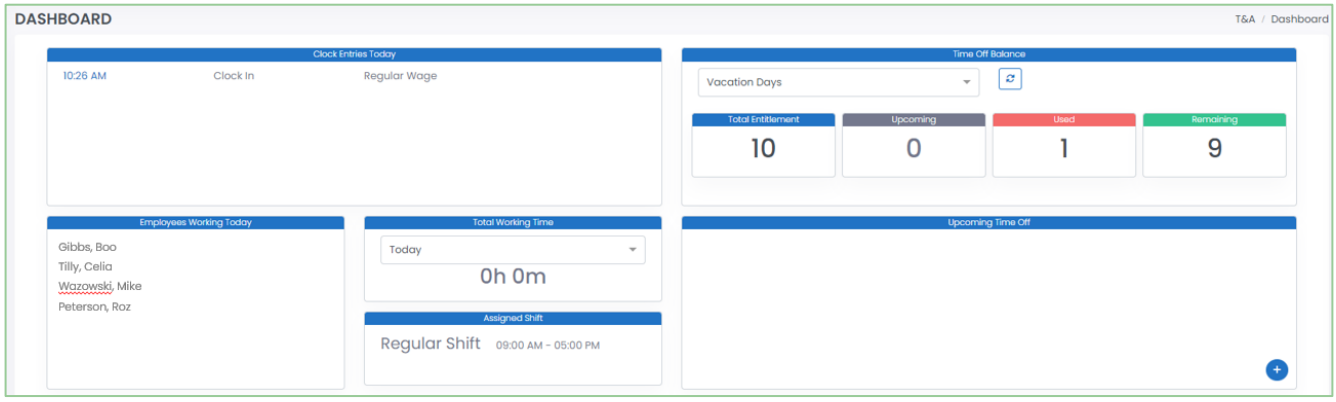
Depending on the permissions that your system administrator has set up for your user account, not all navigation items may be visible to you.





Your Employee Dashboard

Your dashboard gives 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. Employee dashboards gives you a quick summary of your own information, including your clock entries, time off balances, and working time.



Field Name	Description
"Clock Entries Today"	All clock entries that you made today. The start time, end time, and project/task are listed.
"Employees Working Today"	If you are a manager, your subordinates who are working today.
"Total Working Time"	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.
"Assigned Shift"	The shift that you are assigned to.
"Time Off Balance"	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.
"Upcoming Time Off"	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.

Clock Entries

Clock entries are each individual transaction that you make when you 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.

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

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. Using Harmony's Terminal Mode
3. Manually Adding a Clock Entry

Your system administrator may prefer to use one method or another. Please confirm with your system administrator which option you should use.

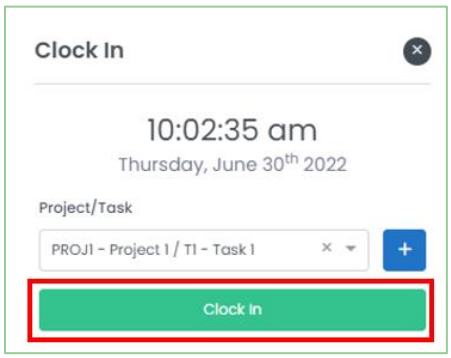
Clocking In & Out with Projects and Tasks

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.

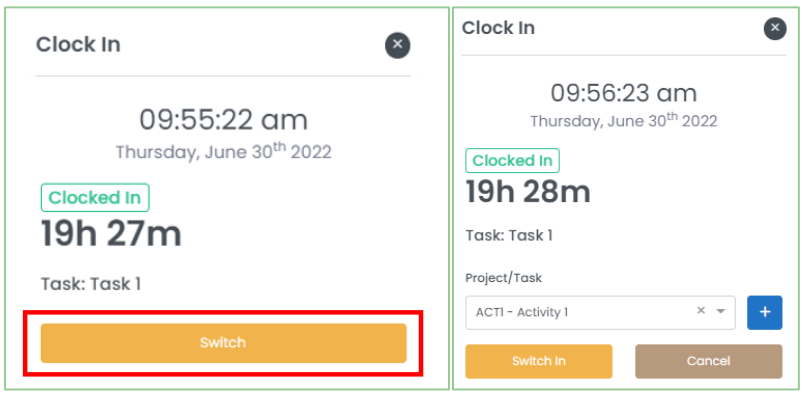
1. Open Harmony's built-in clock bar.

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 why 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.

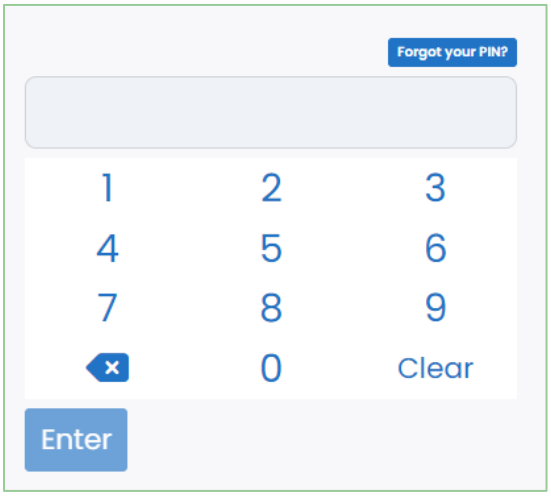
Using Harmony's Terminal Mode

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

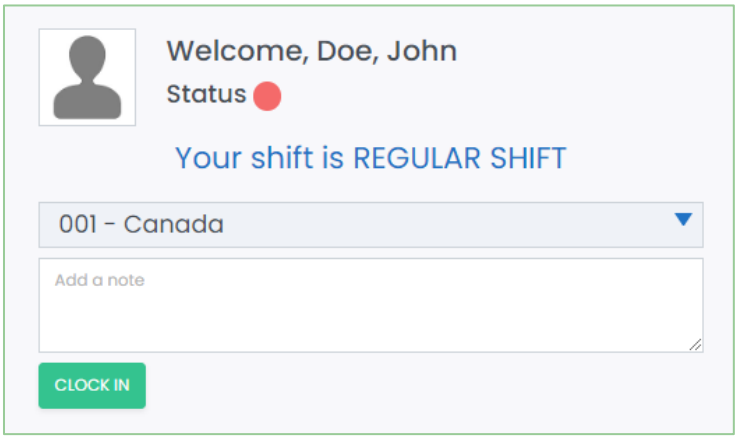
Your manager or system administrator will have already set up the terminal for you. If the terminal is not set up, please contact your manager or system administrator.

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

If you do not have your six-digit PIN, please contact your manager or system administrator.



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



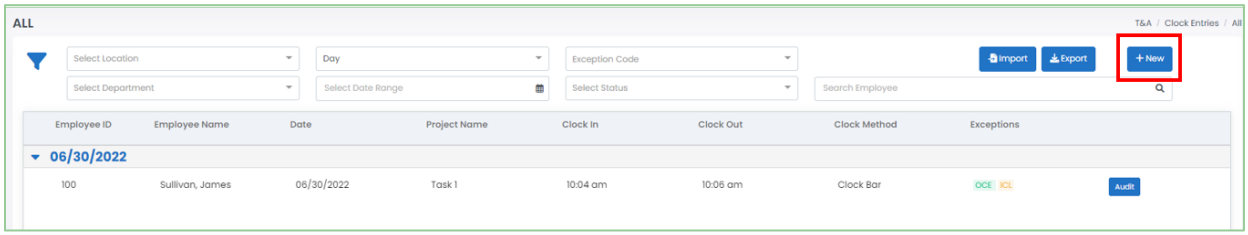
3. Remember to log out!

Manually Creating a Clock Entry

If you prefer to create your own clock entries, or if you forgot to clock in, you can manually create an entry.

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

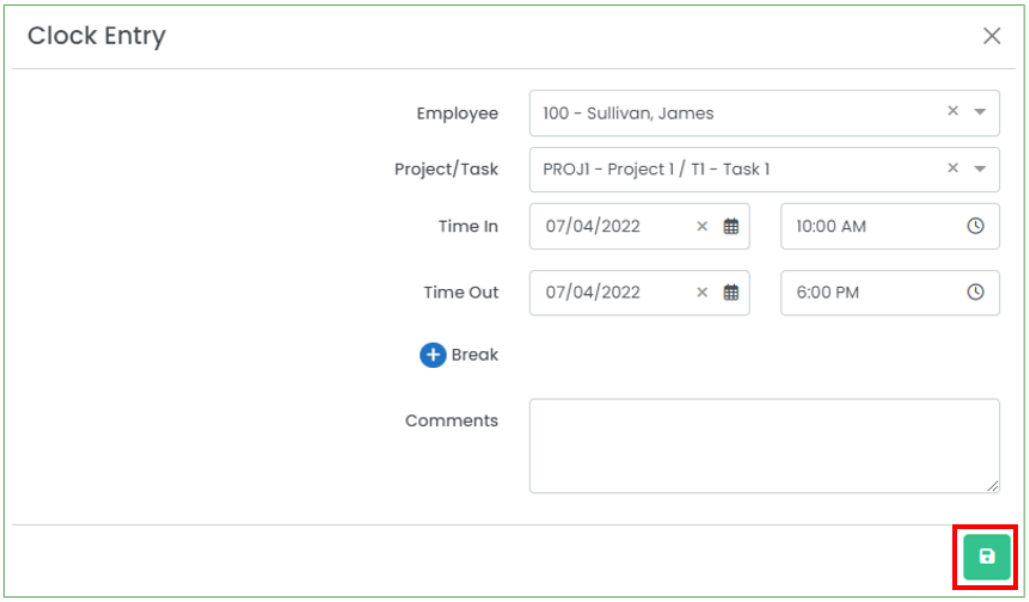
1. Click **"+ New"** to create a new clock entry.



2. Enter the required fields.

Field Name	Description
"Employee"	The employee for which this clock entry is for. Depending on your permissions you may or may not be allowed to create a clock entry on behalf of another employee.
"Project/Task"	The project/task that the employee worked on.
"Clock In"	When the employee clocked in (date and time).
"Clock Out"	When the employee clocked out (date and time).
"Select Break"	The name of the break that the employee took.
"Break In"	When the employee started their break (date and time).
"Break Out"	When the employee finished their break (date and time).
"Comments"	An optional field to add additional comments for the clock entry.

3. Click the save button to save your changes.

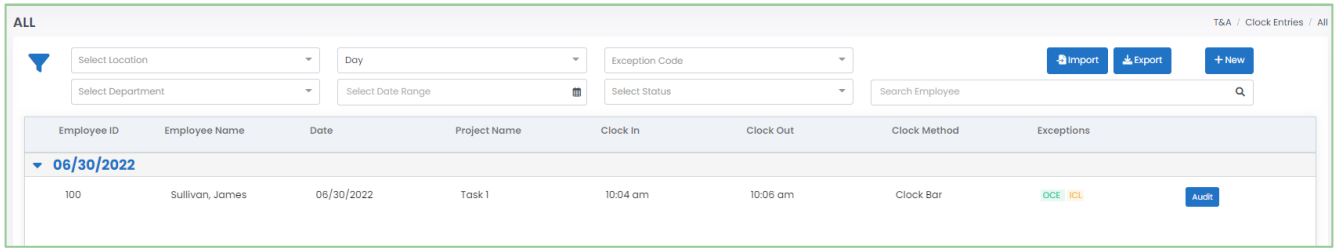


Editing a Clock Entry

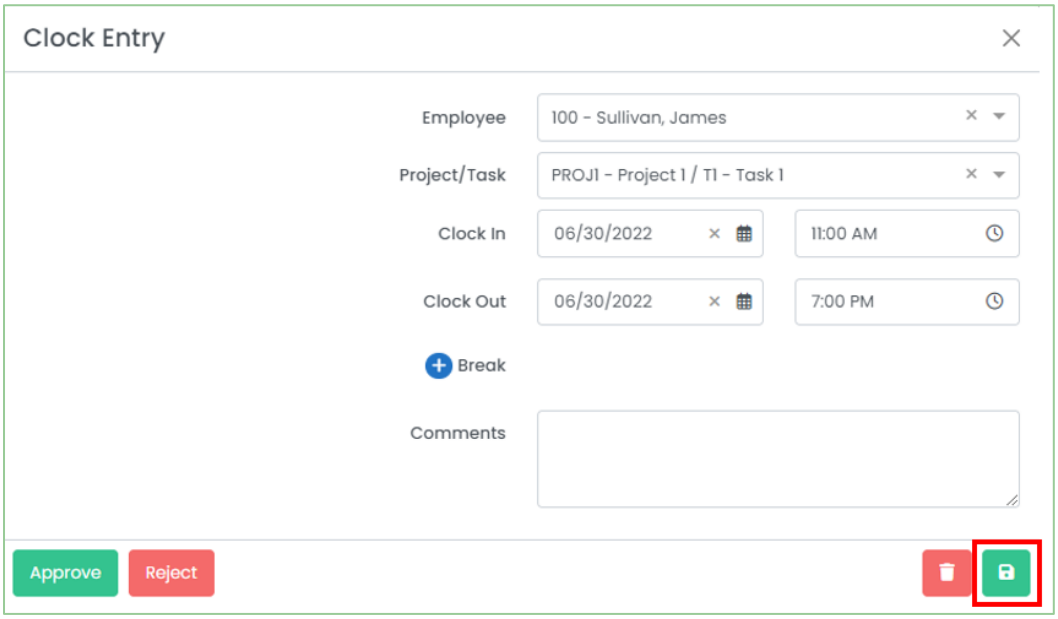
You can only edit a clock entry if it was manually created, hasn't been approved, and/or if you have the permissions to do so.

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.



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



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.

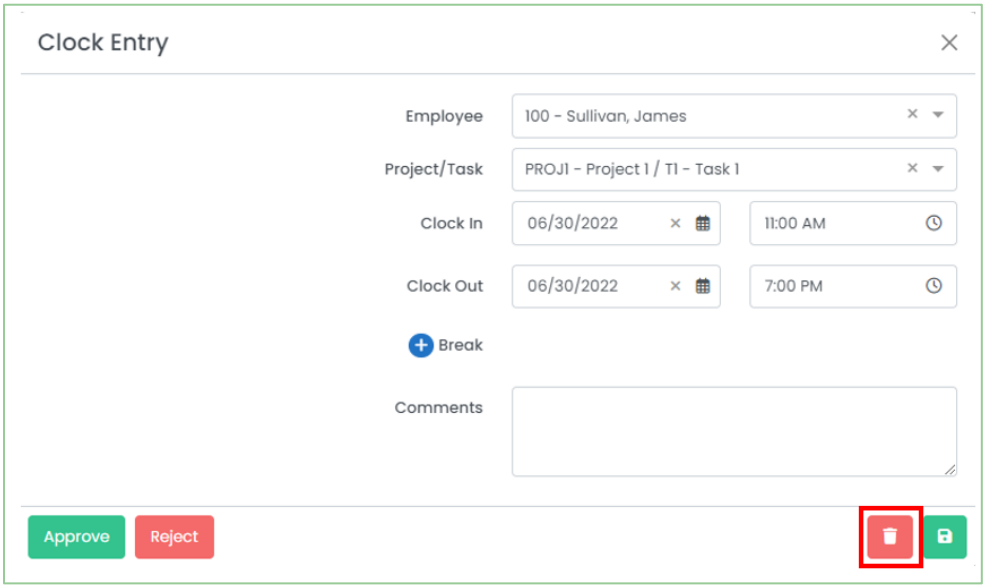
Deleting a Clock Entry

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.

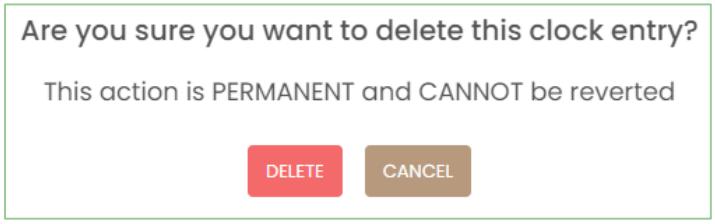
1. From the list of clock entries, select the clock entry you want to delete.

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.



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.



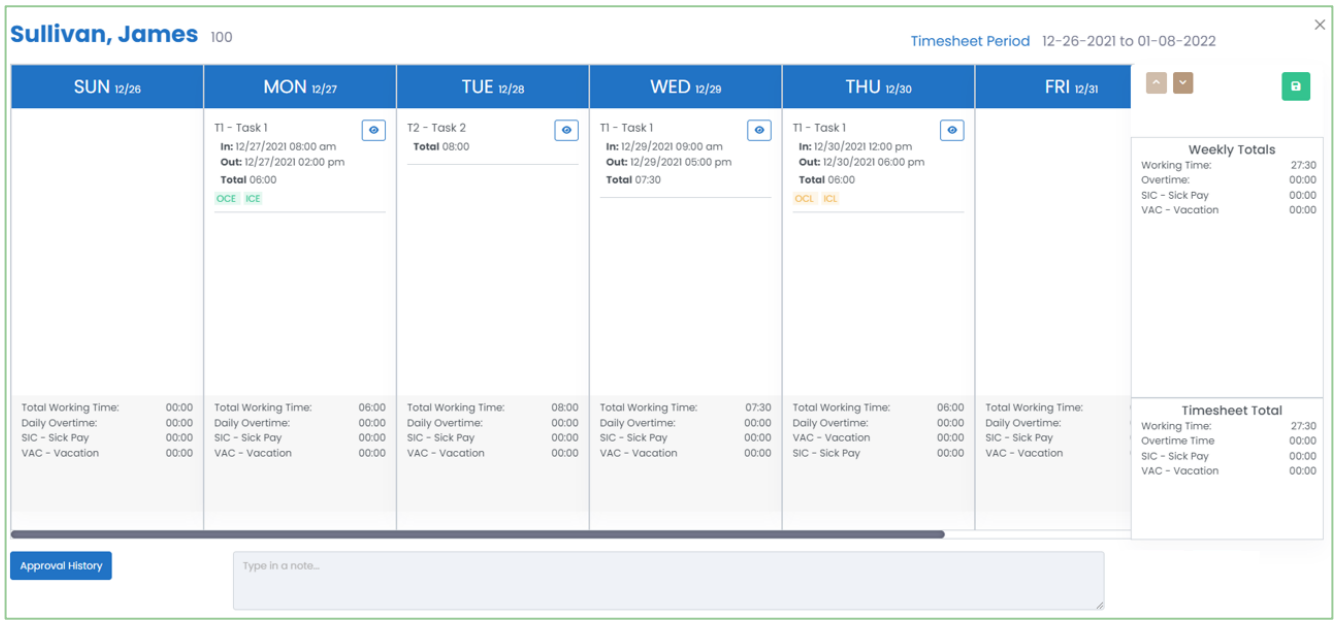
If you accidentally deleted a clock entry, you can re-create it manually.

Timesheets

Your 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 and will be submitted to payroll. You can review your timesheets by navigating to Timesheets.

Only the 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:



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.

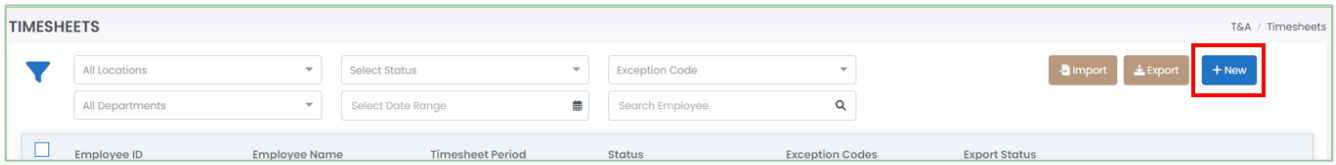
All working time, any automatic overtime calculation and time off taken will appear as a daily total at the bottom of each date, a weekly total on the right-side of the timesheet, and a timesheet total on the bottom-right corner of the timesheet.

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

Creating a Timesheet

Your timesheet may automatically be created depending on the settings of Harmony. Contact your system administrator for more information.

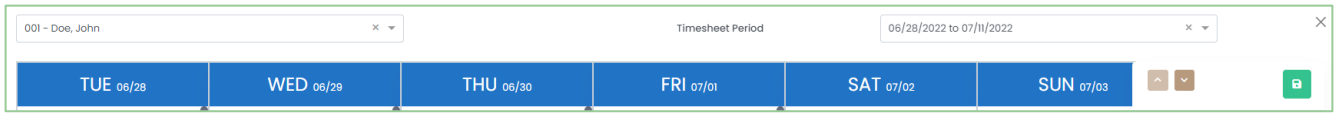
1. Click **"+ New"** to create a new timesheet.



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

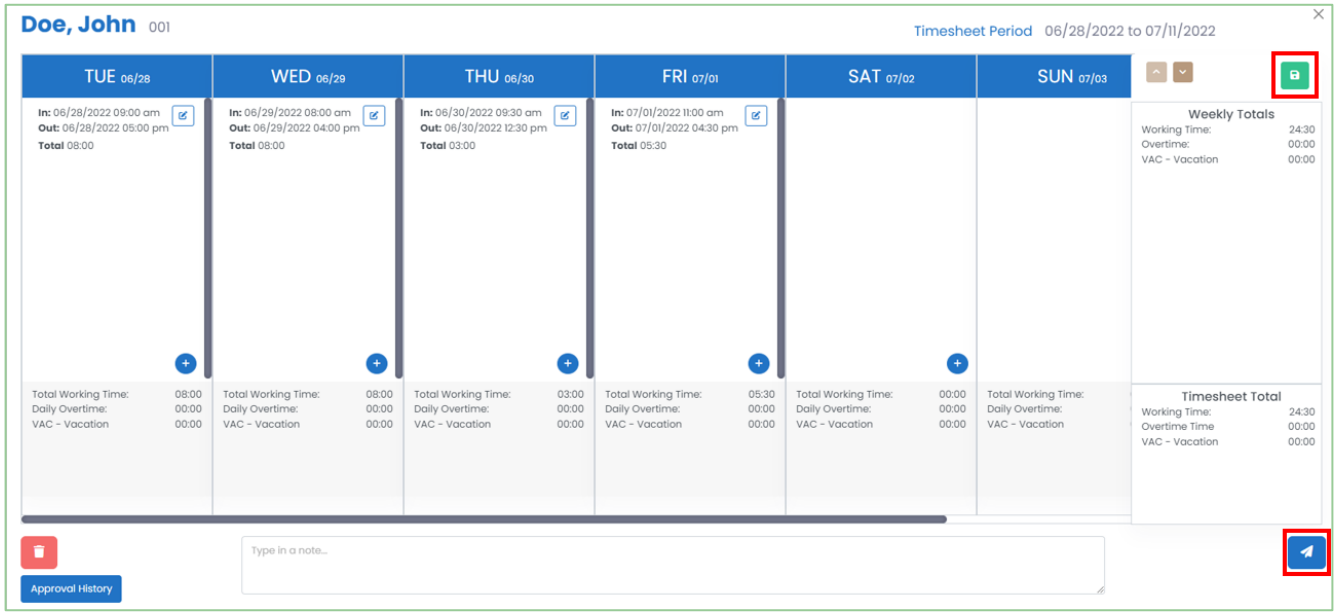
Depending on your permissions, you may or may not be able to create a timesheet on behalf of a different employee.

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



There can only be 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.

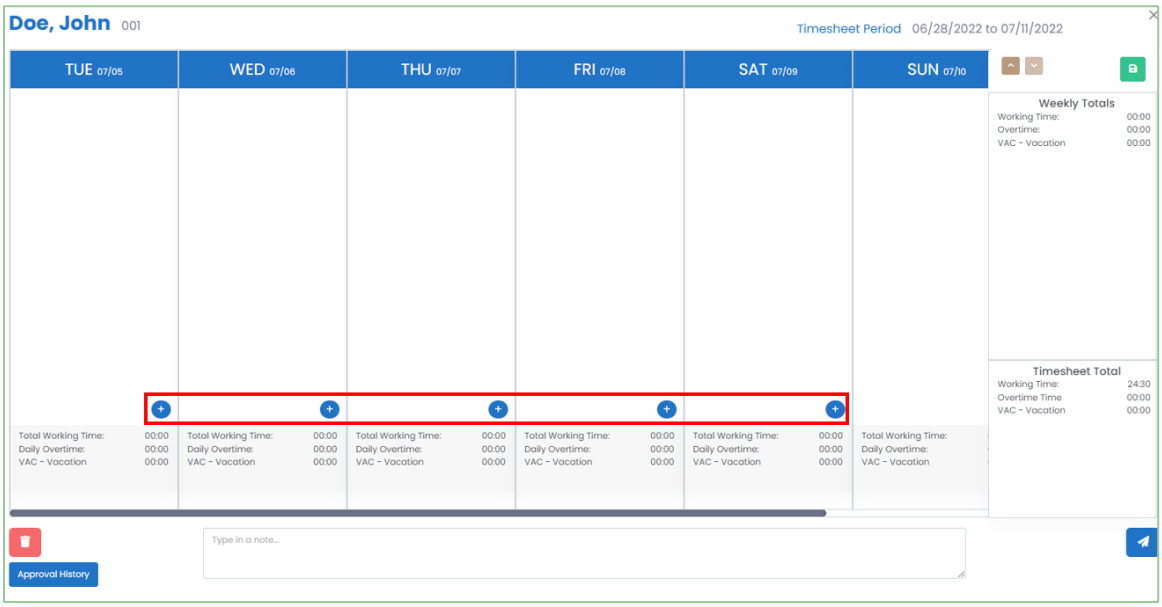


Editing a Timesheet

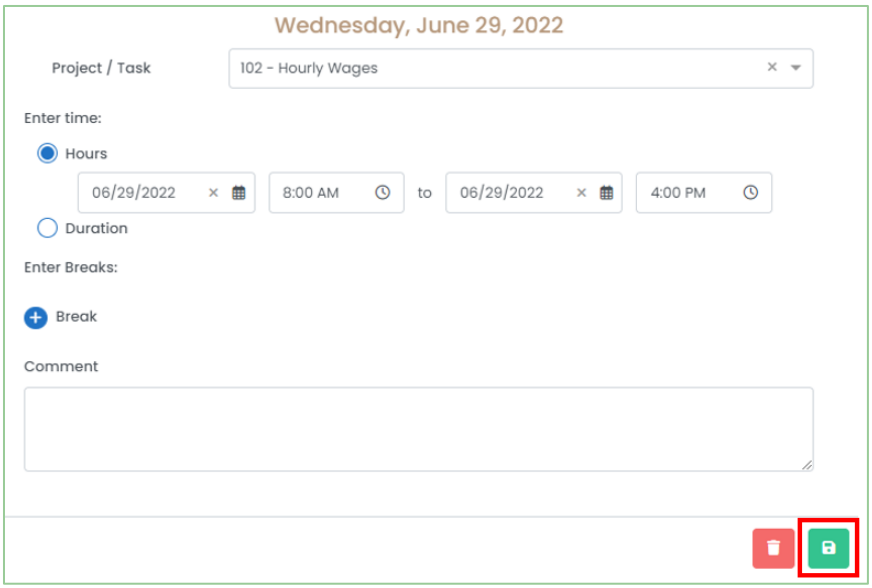
If you require clock entries to be approved, you cannot add, edit, or delete clock entries in the timesheet. Any existing clock entries must be rejected, and you must add, edit, or delete them on the clock entry level before approving them again. Similarly, if the timesheet is already approved or pending approval, you must reject it first prior to making any changes in the timesheet.

Creating a Clock Entry Within a Timesheet

1. From the list of timesheets, select the timesheet that you want to create a clock entry for.
2. Click the **"+"** button on a particular date to add a clock entry for the selected date.

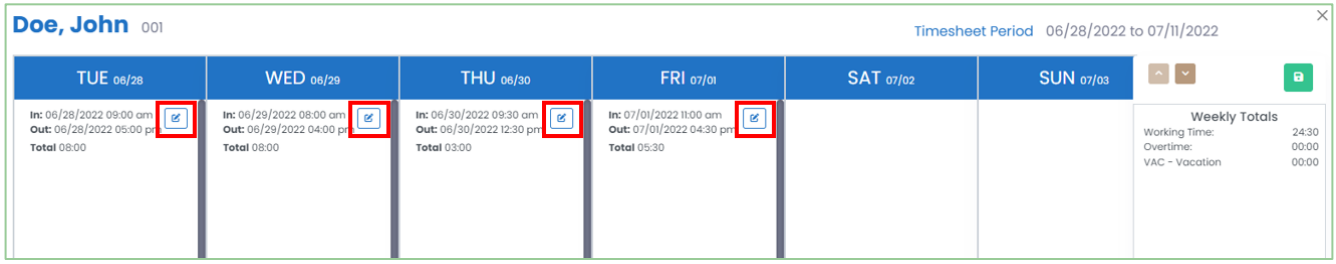


3. Enter the fields as required. The fields required are the same as those in the clock entries.
4. Click the save button to save your changes.

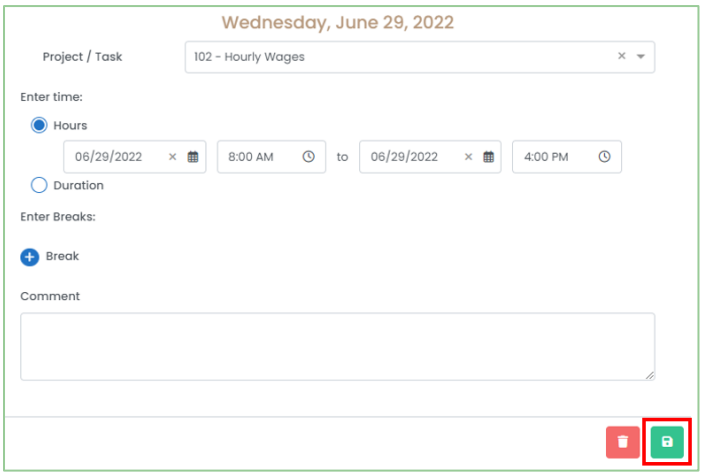


Editing a Clock Entry Within a Timesheet

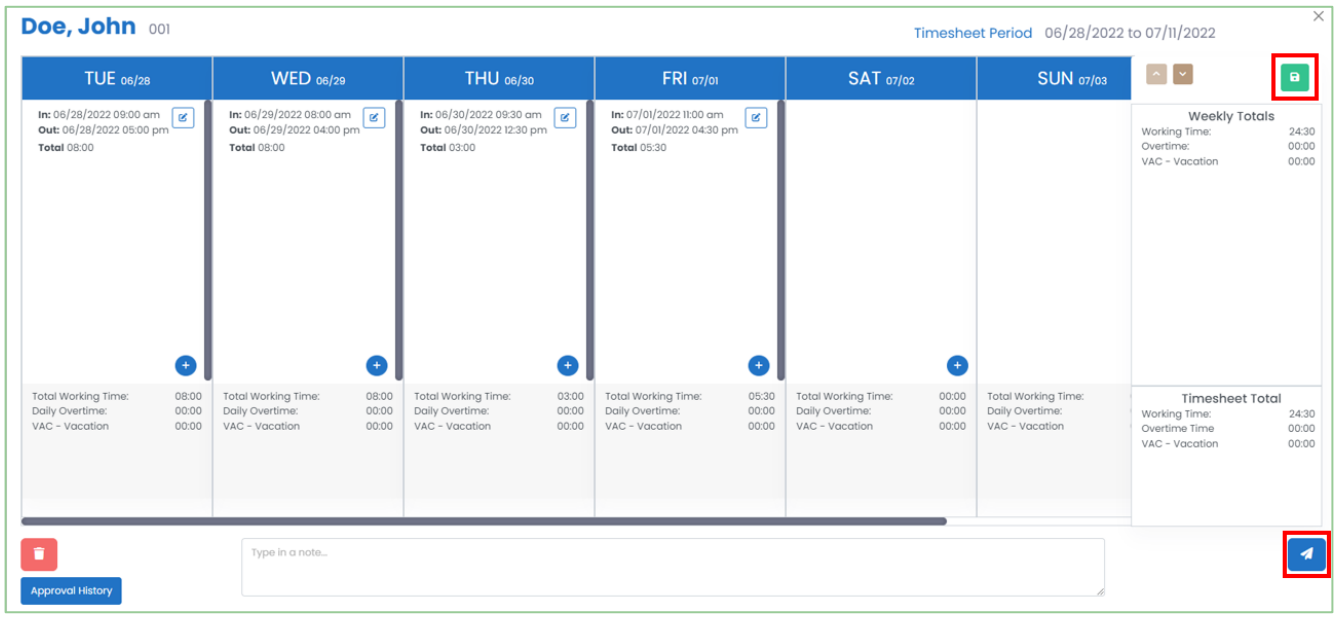
1. From the list of timesheets, select the timesheet that contains the clock entry you want to edit.
2. For each clock entry, click the edit button to edit the clock entry.



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

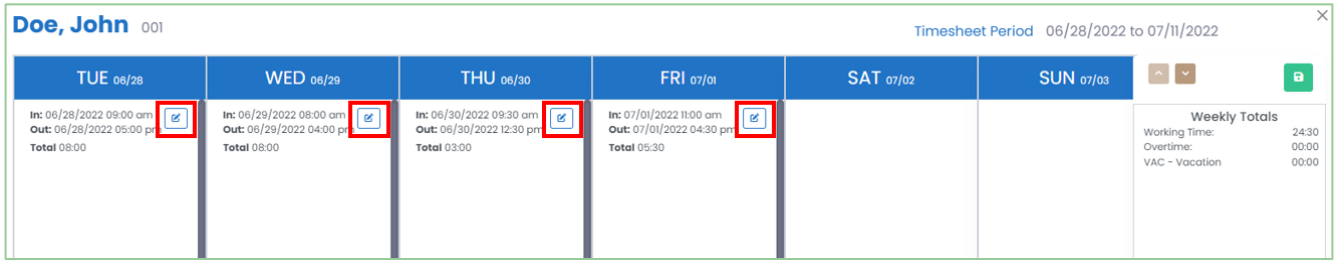


5. Click the save button for the timesheet to save it as a draft or click the send button to submit the timesheet for approval.

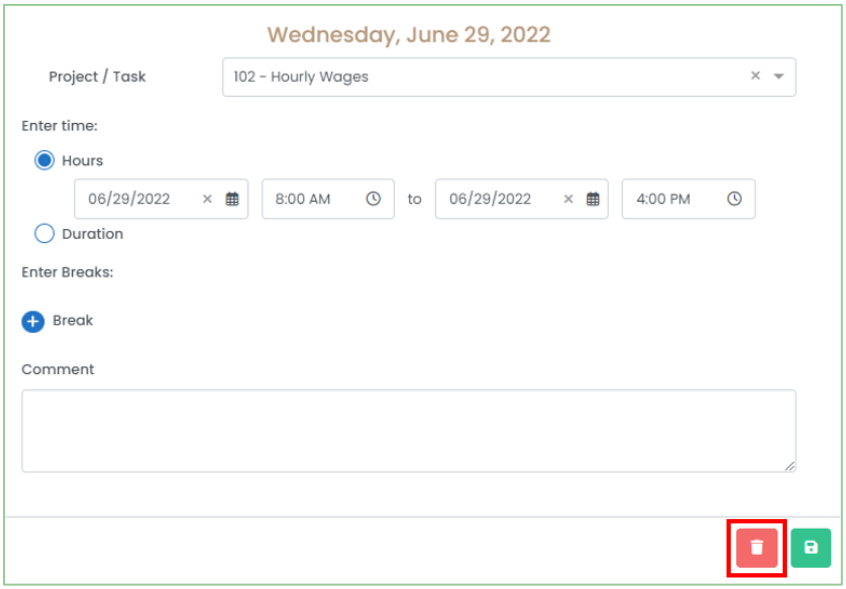


Deleting a Clock Entry Within a Timesheet

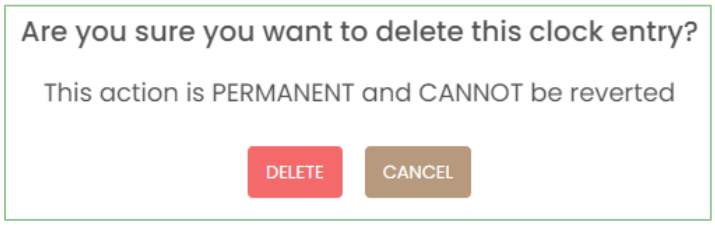
1. From the list of timesheets, select the timesheet that contains the clock entry you want to delete.
2. Click the edit button for the clock entry that you want to delete.



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



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.

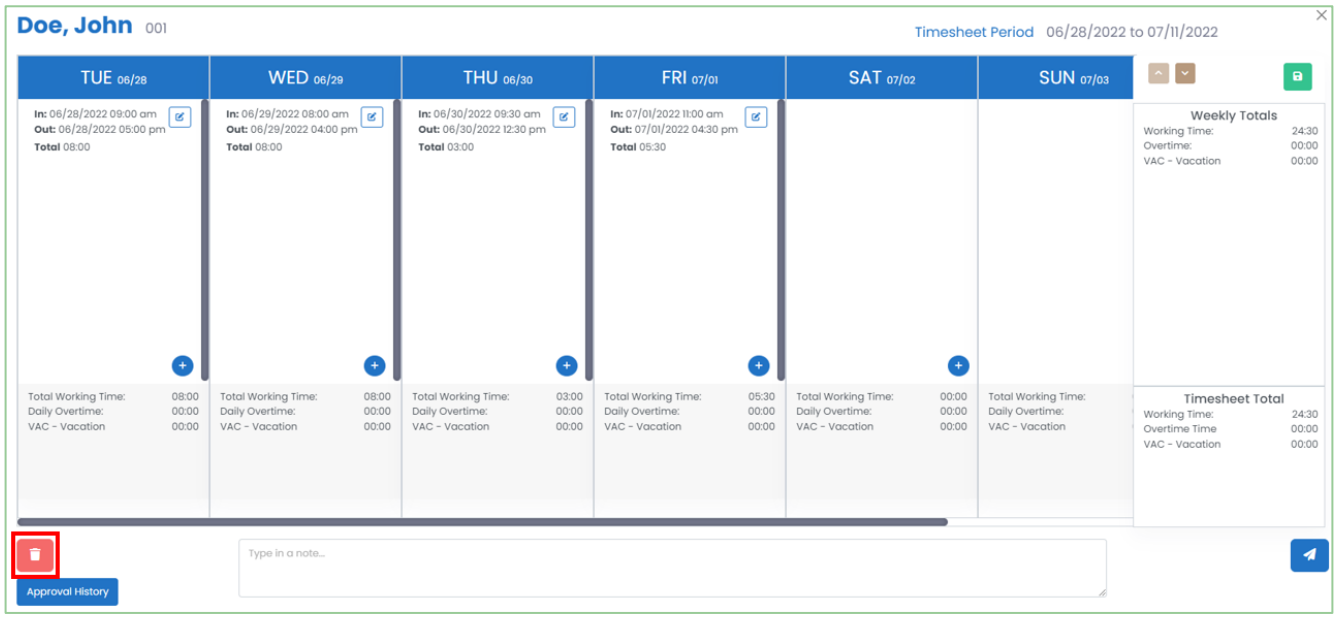


If you accidentally deleted a clock entry, you can re-create it manually if you do not require approvals for clock entries.

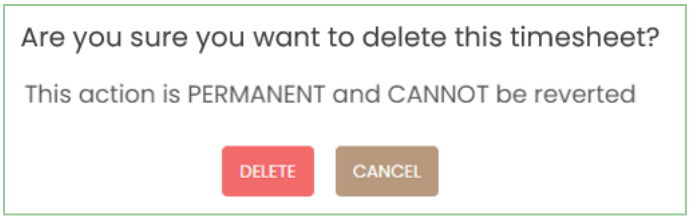
Deleting a Timesheet

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.



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.



Helpful Tips

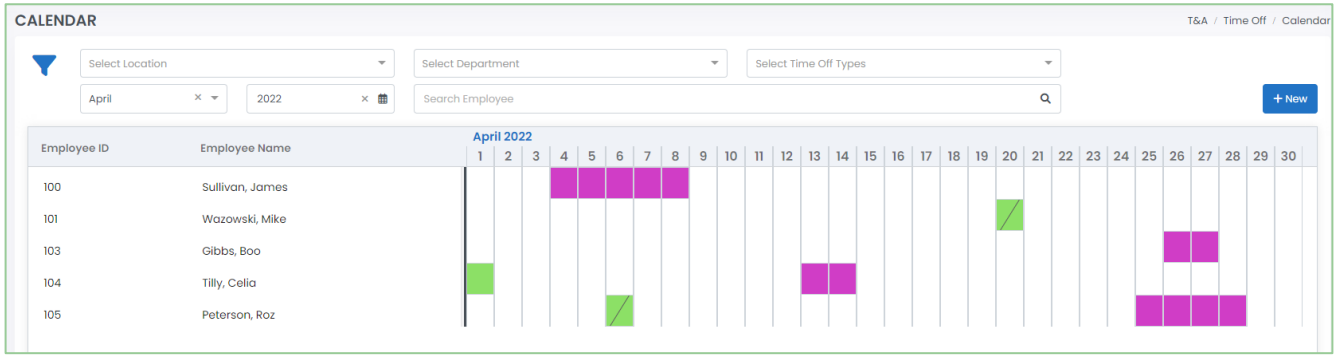
If you accidentally deleted a timesheet, you can re-create it manually.

Time Off / PTO / Absences

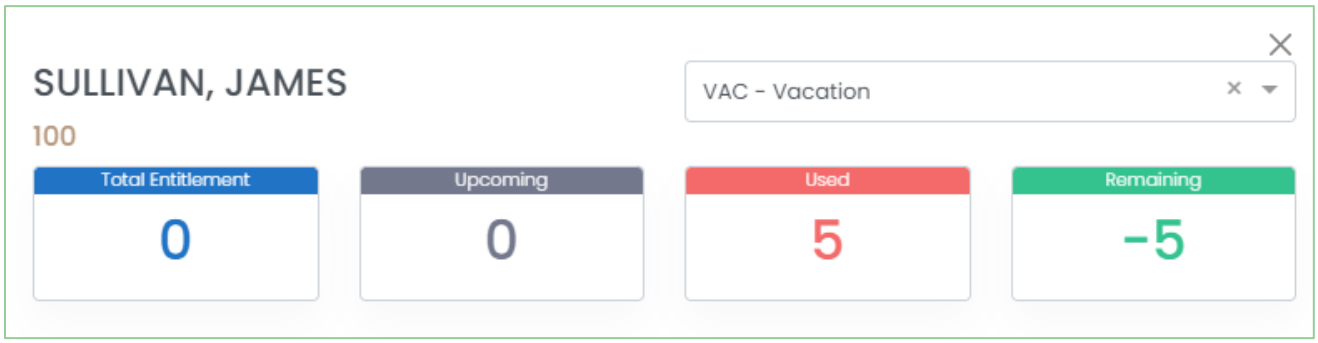
Your time off can be requested, cancelled, approved, rejected, and reviewed. You can review your time off records in Time Off. Historical records can be viewed in Time Off > History.

Time Off Calendar

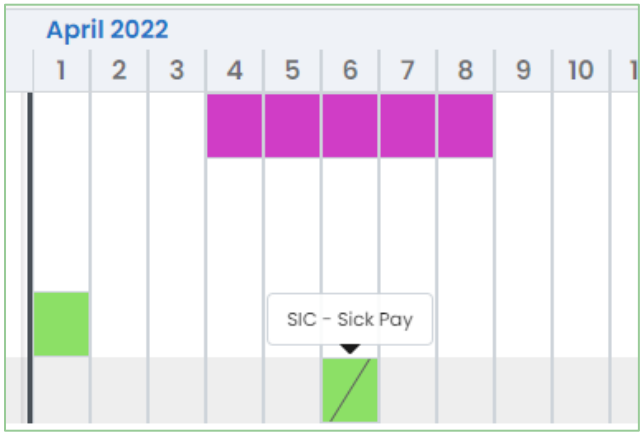
All approved time off records, if allowed, will be displayed in the time off calendar. Different colors will indicate different time off types.



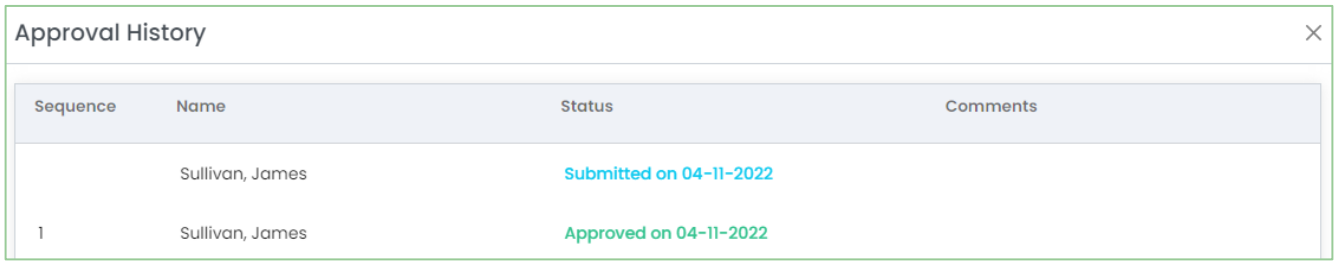
1. Navigate to Time Off > Calendar.
2. Click on an employee to view their balance. You change review their balances for different time off types using the dropdown provided.



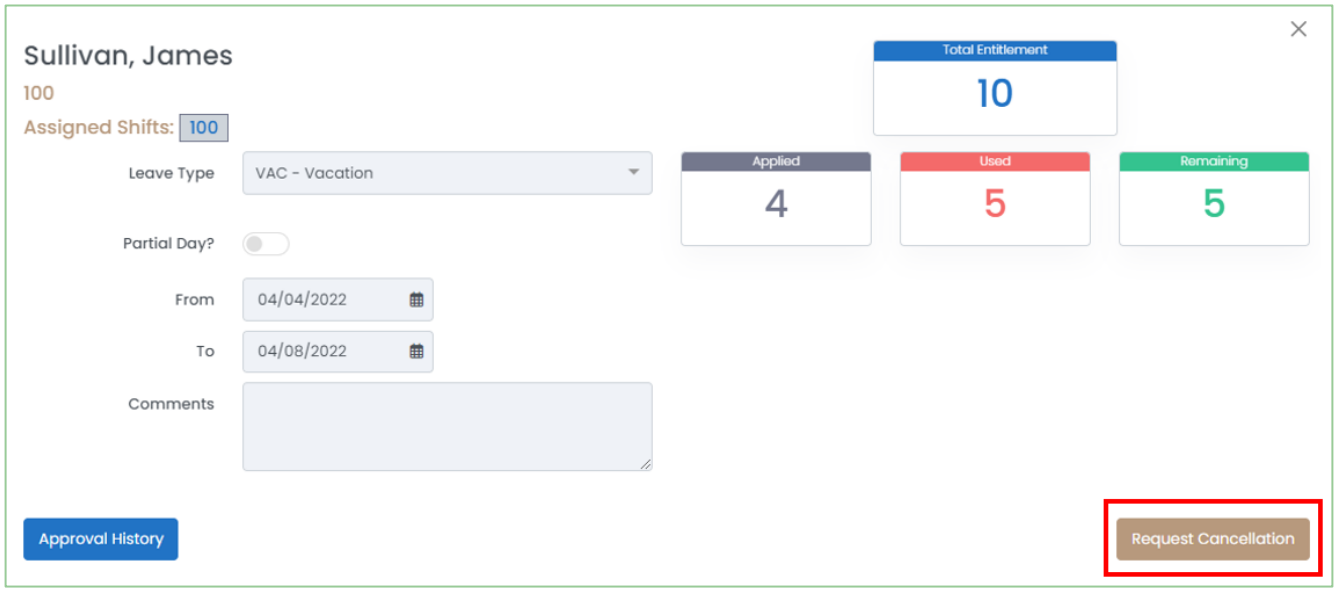
3. Return to the calendar and hover over a color block in the calendar to view which time off type it is.



4. 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.



5. If this was your time off request, click **"Request Cancellation"** to cancel the request.

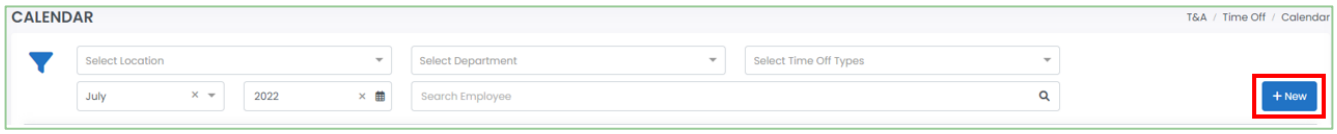


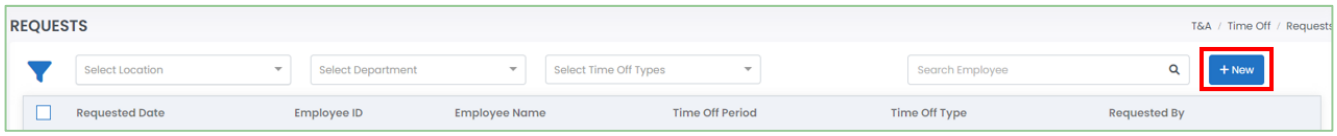
If you are cancelling a request, the approver of your time off must acknowledge the cancellation and 'approve' of the cancellation. If the approver does not approve, the time off request will remain approved.

Creating a Time Off Request

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

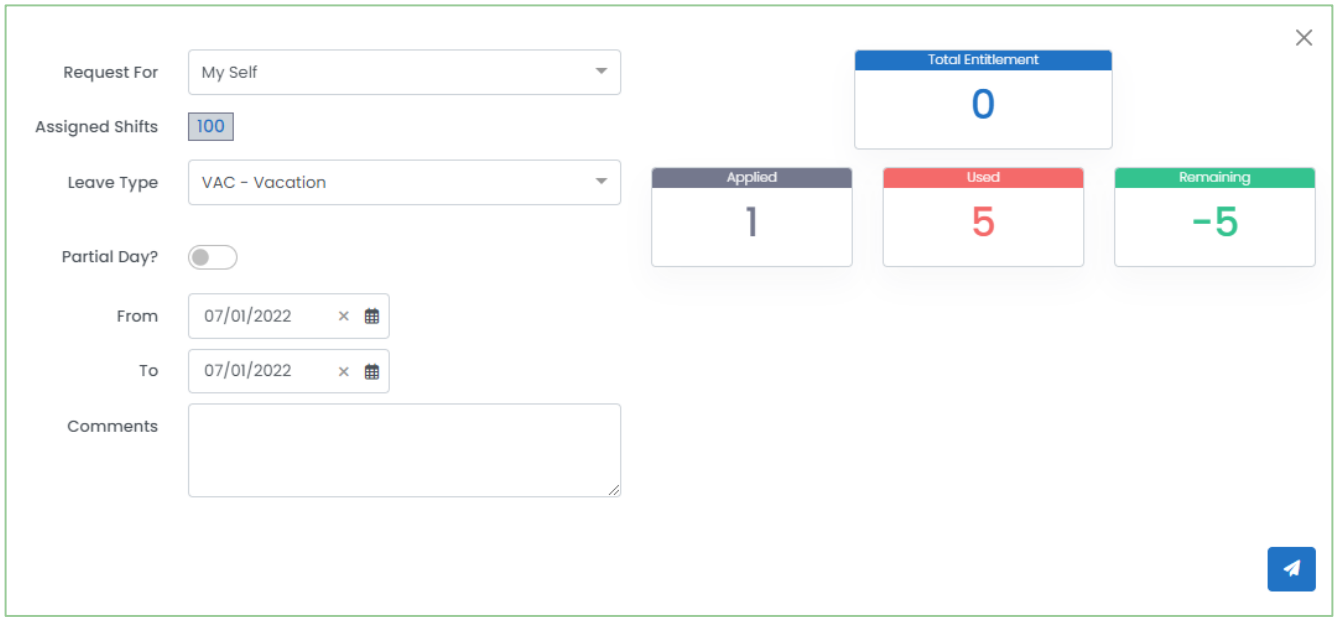
1. Navigate to Time Off > Calendar or Time Off > Requests.
2. Click **"+ New"** to create a new time off request.





3. Enter all required fields.

Field Name	Description
"Request For"	Identifies who the request is for – either yourself or on behalf of someone else, depending on what permissions your user account has.
"Leave Type"	Identifies which time off type is used.
"Partial Day?"	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'.
"From"	If the time off type is in 'days', identifies the first date of the request.
"To"	If the time off type is in 'days', identifies the last date of the request.
"Day(s)"	If the time off type is in 'hours', identifies the date of the request.
"Hours"	Identifies the number of hours per day that relates to the request.
"Comments"	An optional field to enter any comments for the request.



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

Cancelling a Time Off Request

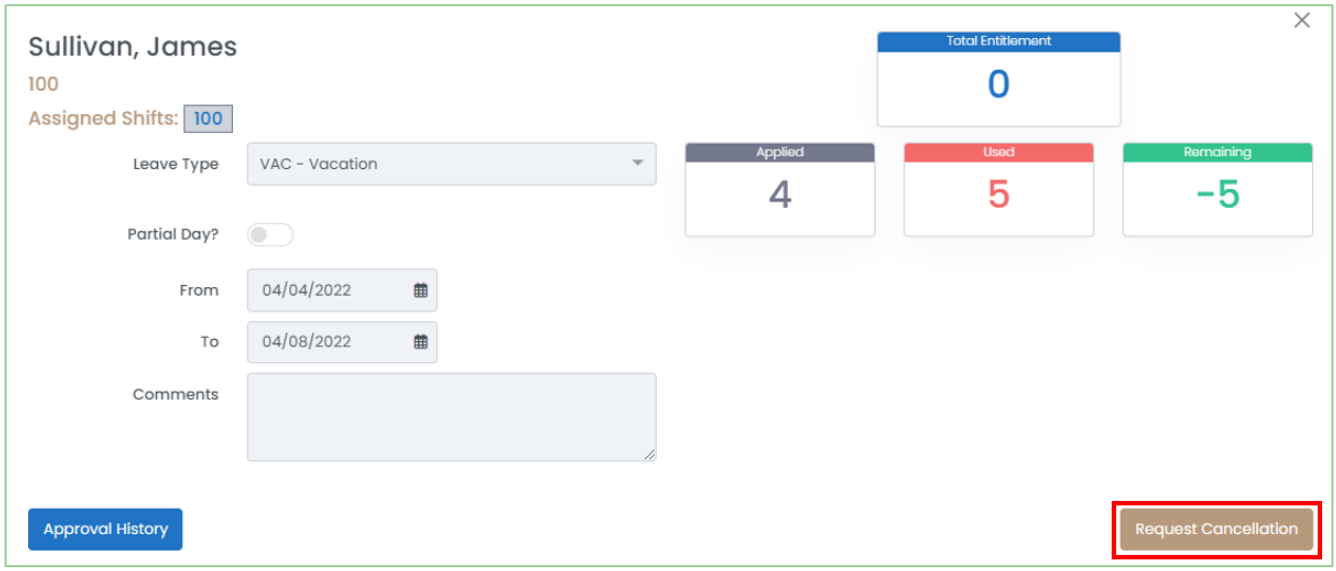
If your plans change, you can cancel your own time off request. With the correct permissions, you may be able to request a cancellation of a time off request on behalf of someone else.

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.



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.

Contact Paymate Support

Before you contact the Paymate support team directly, please contact your system administrator, manager, and/or 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/

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

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