

HARMONY

TIME & ATTENDANCE MANAGER USER MANUAL



V.1.2

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.
	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.
	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.
"Radio"	Radio field options that can be selected will be italicized and in double quotation marks.
<u>"Field"</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

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 employee user manual.

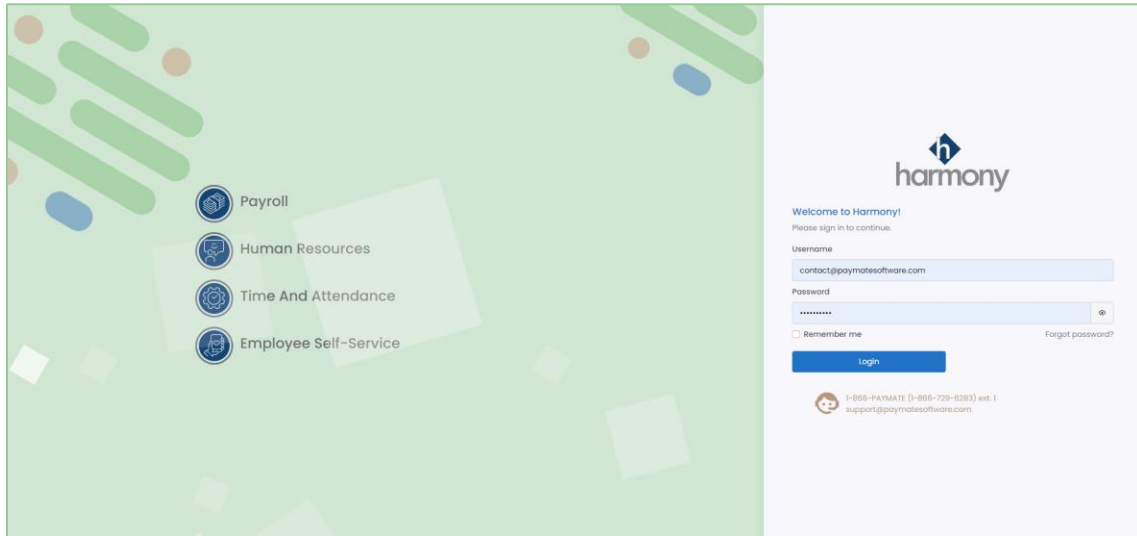
Software Version

v1.3.9-2022-06-29

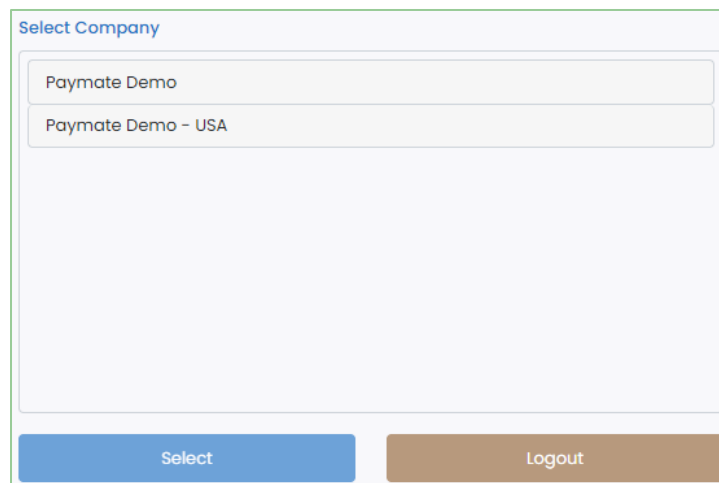
Logging In

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.



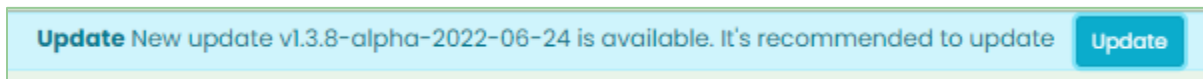
7. Select the Time & Attendance module.



Depending on what modules 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.

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.

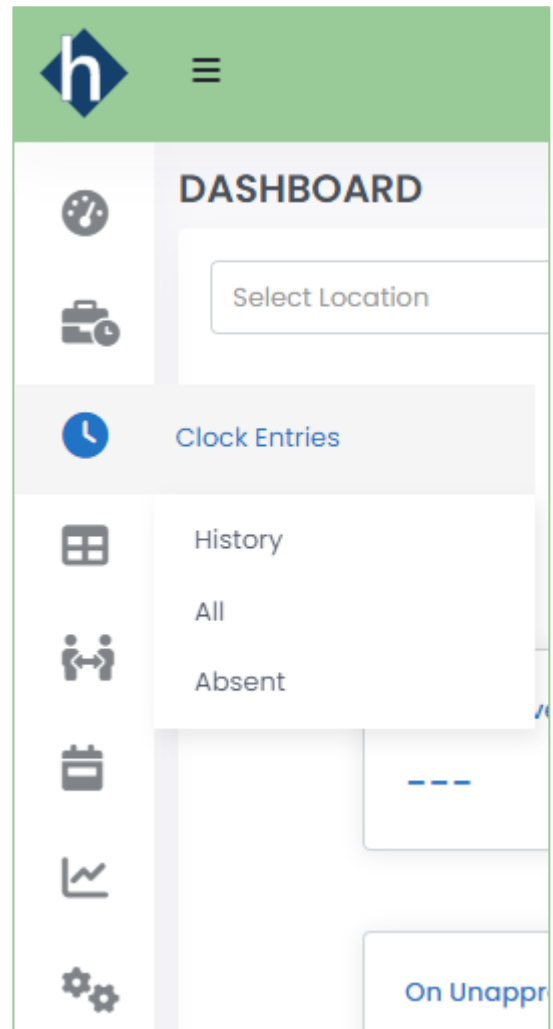
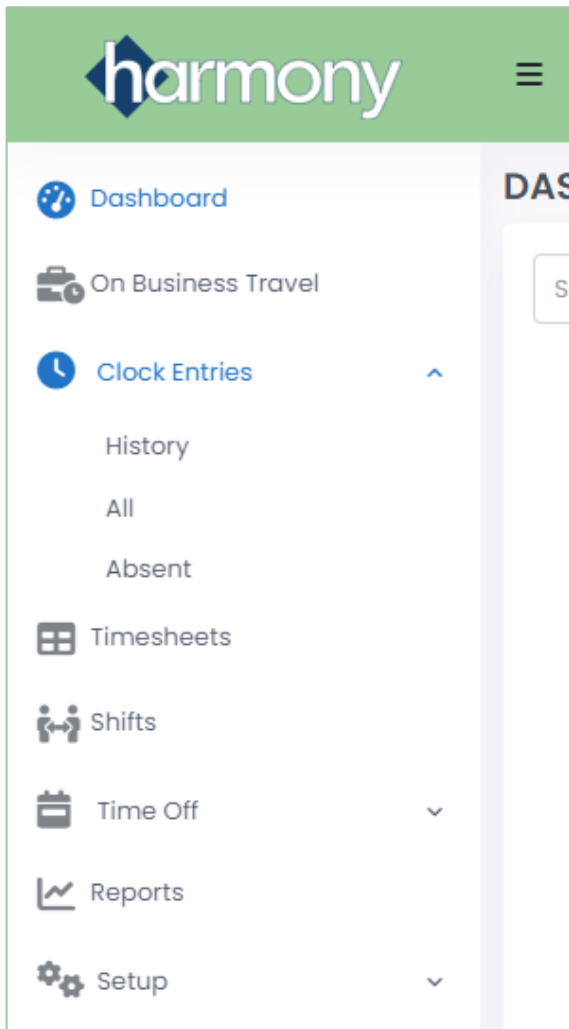


Navigating Through Harmony T&A

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.



Setting Up Harmony Time & Attendance

Your administrative users should already have set up Harmony Time & Attendance. Please contact your system administrator for more information.

Using Harmony Time & Attendance

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
<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.

Clock Entries

Clock entries are each individual transaction that you and 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.

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.

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](#)



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.

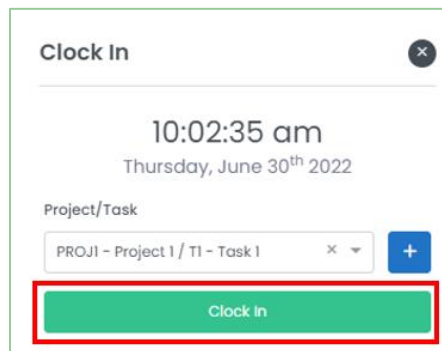
1. Open Harmony's built-in clock bar.



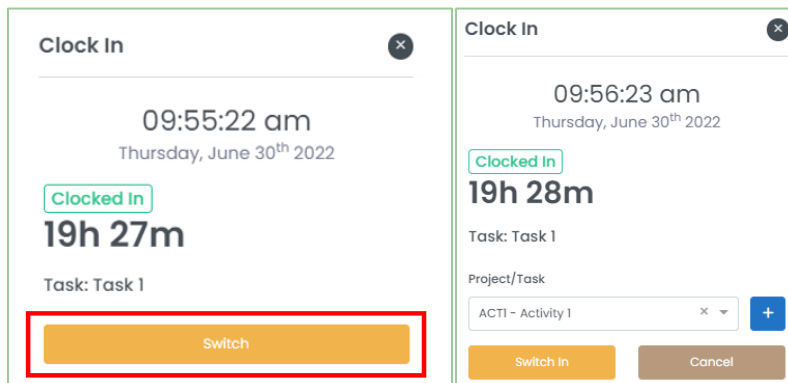
2. Select your *"Project/Task"* to clock into.
3. Click **"Clock In"** to clock into your selected project/task.



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.

Clocking In & Out with a Hardware Time Clock

If you are currently using a hardware time clock, in which you and your employees are using a card or a biometric method to clock in and out, you must set up 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.

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.



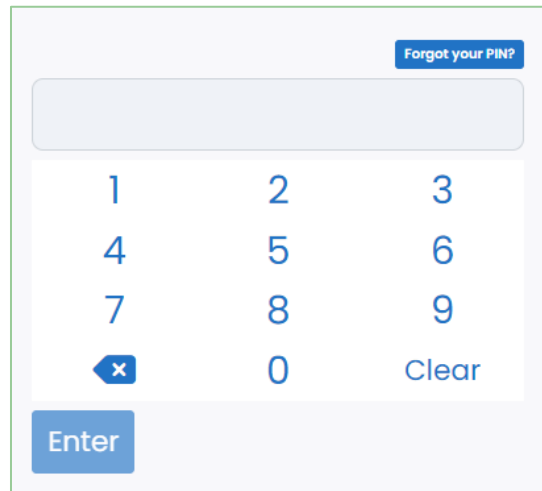
You must have set up the terminal mode as a prerequisite. If you do not have access to the Setup section of Harmony Time & Attendance, please contact your system administrator.

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.

The screenshot shows a web interface for assigning employees to a terminal. At the top right, there are two tabs: 'Assign' (active) and 'Messages'. Below the tabs are three dropdown menus: 'Select Location', 'Select Department', and 'Select Custom Group'. A search bar is located below these menus. The main area contains a list of employees with checkboxes and toggle switches. The employees listed are: ALL (5/5), 100 - Sullivan, James, 101 - Wazowski, Mike, 103 - Gibbs, Boo, 104 - Tilly, Celia, and 105 - Peterson, Roz. A blue button labeled 'Send PIN to assigned employees' is positioned at the bottom right of the list.

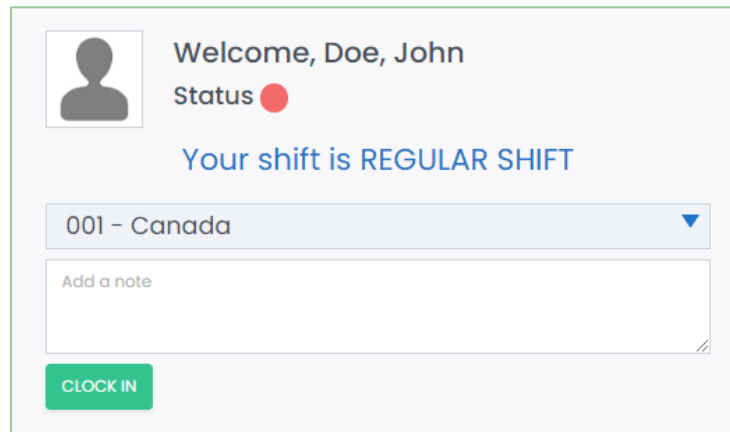
4. Copy the "URL".
5. On the device you want to set up the terminal for, open the browser and paste the "URL" that you copied. The terminal mode is now activated.

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 blue button labeled "Forgot your PIN?". Below it is a light gray input field for the PIN. The keypad consists of a 3x3 grid of buttons: the first row contains "1", "2", and "3"; the second row contains "4", "5", and "6"; the third row contains "7", "8", and "9". Below the grid are three buttons: a blue button with a white "x" and a left-pointing arrow, a "0" button, 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. At the top left is a gray silhouette icon of a person. To its right, 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 is a green button labeled "CLOCK IN".

8. 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.

The screenshot shows the 'ALL' page for Clock Entries. At the top right, there are buttons for 'Import', 'Export', and '+ New'. The '+ New' button is highlighted with a red box. Below the buttons is a table with columns: Employee ID, Employee Name, Date, Project Name, Clock In, Clock Out, Clock Method, and Exceptions. A row is visible for 06/30/2022 with Employee ID 100, Name Sullivan, James, Date 06/30/2022, Project Name Task 1, Clock In 10:04 am, Clock Out 10:06 am, Clock Method Clock Bar, and Exceptions OCE, ICL. There is also an 'Audit' button.

2. Enter the required fields.

Field Name	Description
<u>“Employee”</u>	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.
<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.

The screenshot shows the 'Clock Entry' form. It has fields for Employee (100 - Sullivan, James), Project/Task (PROJ1 - Project 1 / T1 - Task 1), Time In (07/04/2022, 10:00 AM), and Time Out (07/04/2022, 6:00 PM). There is a '+ Break' button and a 'Comments' text area. At the bottom right, there is a green save button highlighted with a red box.

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. If you do not have access to the setup section of Harmony Time & Attendance, please contact your system administrator.

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

The screenshot shows the 'ALL' view of the 'Clock Entries' section. At the top right, there are three buttons: 'Import', 'Export', and '+ New'. The 'Import' button is highlighted with a red rectangular box. Below the buttons are several filter fields: 'Select Location', 'Day', 'Exception Code', 'Select Department', 'Select Date Range', and 'Select Status'. A search bar for 'Search Employee' is also present. Below these filters is a table header with columns: Employee ID, Employee Name, Date, Project Name, Clock In, Clock Out, Clock Method, and Exceptions.

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.

The screenshot shows a dialog box titled 'Import Clock Entries'. Inside the dialog, there is a label 'Interface' followed by a dropdown menu showing 'ICSTD - Import Clock Standard'. Below this is a 'Choose File' button and a text field containing 'Clock Entries Import.txt'. At the bottom right of the dialog, there is a blue 'Import' button, which is highlighted with a red rectangular box.



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.

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 🗑️ 🔒



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.

Clock Entry

Employee 100 - Sullivan, James x

Project/Task PROJ1 - Project 1 / T1 - Task 1 x

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

Clock Out 06/30/2022 x 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.

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.

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.

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 a web interface for managing clock entries. At the top, there are filters for Location, Department, Date Range, Exception Code, and Status, along with buttons for Import, Export, and New. 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 selected. Two rows are visible, both with checkboxes checked: one for James Sullivan (Employee ID 100) and one for Mike Wazowski (Employee ID 101). At the bottom left, there are 'Approve' and 'Reject' buttons. At the bottom right, there are pagination controls showing '1' of 10 items per page.

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	

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 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.

Timesheets

You and 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 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:

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 Approve Reject

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

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](#)



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

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.



If you do not have access to the setup section of Harmony Time & Attendance, please contact your system administrator.

The screenshot shows the "PREFERENCES" section of the Harmony Time & Attendance system. The interface is divided into two columns of settings. The left column includes: "Default First Day Of Week" (Monday), "Default Timesheet For Approval Path" (DEFAULT-Default), "Default Time Off Approval Path" (DEFAULT-Default), "Default Timesheet Period" (BiWeekly), "Default Time Balance Unit" (Hours), and "Default Hours Per Day" (8). The right column includes: "Default Project/Task" (PROJ1 - Project 1 / T1 - Task 1), "Default Pay Code" (102-Hourly Wages), "Default Shift" (100-Regular Shift), and "Default Time Off Type" (VAC-Vacation). Below these are several checkboxes: "Allocate Clock In/Out According To Clock Out Day" (unchecked), "Require approvals for all clock entries" (checked), "Auto-create timesheets with existing clock entries" (checked and highlighted with a red box), and "Terminated Employees" (unchecked). A green save button is visible in the bottom right corner.



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.

Manually Creating a Timesheet

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

TIMESHEETS T&A / Timesheets

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

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.

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



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.

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	

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. If you do not have access to the setup section of Harmony Time & Attendance, please contact your system administrator.

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

The screenshot shows the 'TIMESHEETS' page with various filters and buttons. The 'Import' button is highlighted with a red box. The page includes dropdown menus for 'All Locations', 'Select Status', 'Exception Code', 'All Departments', and 'Select Date Range', along with a 'Search Employee' field. A table header is visible at the bottom 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 'Import timesheets' dialog box shows the 'Interface' dropdown set to 'ITSTD - Import timesheet Standard'. The 'Choose File' button is highlighted with a red box, and the 'Import' button is also highlighted with a red box. The file name 'Timesheets Import.txt' is visible next to the 'Choose File' button.



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.

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.

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.

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.

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: 06:00 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 **Approve** **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: 06:00 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 **Approve** **Reject**

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.

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



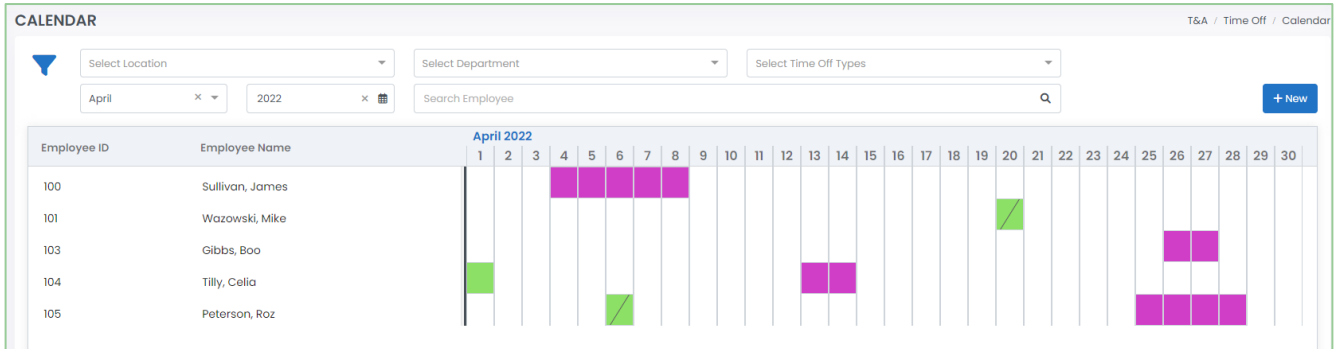
You can sort this list of employees by clicking the headers!

Time Off / PTO / Absences

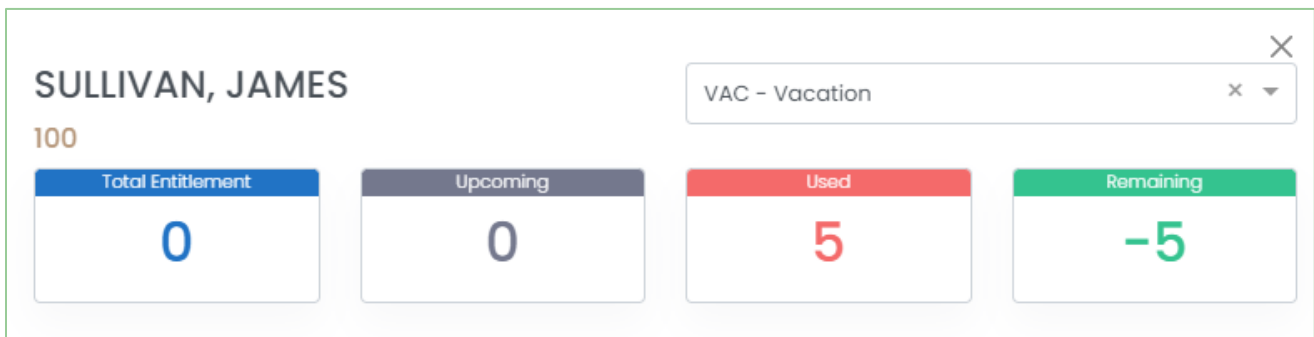
You and your employees' time off can be requested, cancelled, approved, rejected, and reviewed. You can review your time off records in Time Off. Historical records can be viewed in Time Off > History.

Time Off Calendar

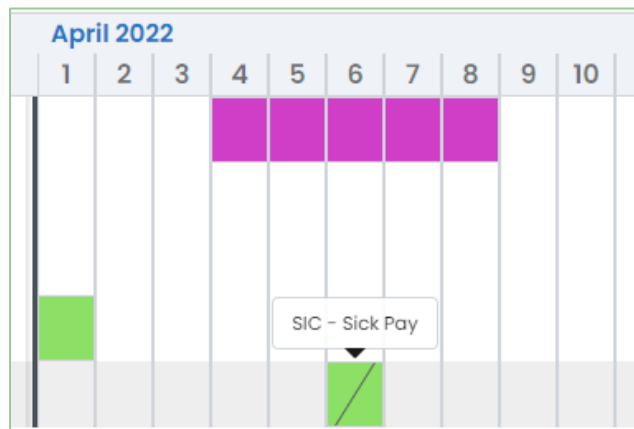
All approved time off records, if allowed, will be displayed in the time off calendar. Different colors will indicate different time off types.



1. Navigate to Time Off > Calendar.
2. Click on an employee to view their balance. You can 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.



- 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	
	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

Total Entitlement: 0

Applied: 4 **Used**: 5 **Remaining**: -5

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.

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 section with 'Select Location', 'Select Department', and 'Select Time Off Types' dropdowns. Below these are date pickers for 'July' and '2022', and a 'Search Employee' input field. A blue '+ New' button is highlighted with a red box in the top right corner.

The screenshot shows the 'REQUESTS' interface. It has similar filters to the calendar view: 'Select Location', 'Select Department', 'Select Time Off Types', and 'Search Employee'. A blue '+ New' button is highlighted with a red box in the top right corner. 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, depending on what permissions your user account has.
<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. On the left, there are input fields for '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'. On the right, there is a summary section: 'Total Entitlement' (0), 'Applied' (1), 'Used' (5), and 'Remaining' (-5). A blue send button with a paper plane icon is in the bottom right corner.

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.

Sullivan, James

100

Assigned Shifts: 100

Leave Type: VAC - Vacation

Partial Day?

From: 04/04/2022

To: 04/08/2022

Comments

Applied	Used	Remaining
4	5	-5

Total Entitlement: 0

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.

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.

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.

The screenshot shows a table titled 'REQUESTS' with the following columns: Requested Date, Employee ID, Employee Name, Time Off Period, Time Off Type, and Requested By. Five rows are selected, each with a checked checkbox in the first column. At the bottom left, the 'Approve' button is highlighted with a red box.

<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

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

This screenshot is identical to the previous one, showing the 'REQUESTS' table with five selected rows. The 'Approve' button at the bottom left is highlighted with a red box.

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

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.

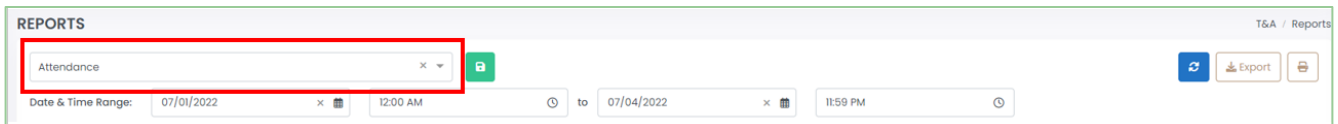
Available Reports

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.

Opening a Report

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



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 the date range is from 07/01/2022 to 07/04/2022. The data is grouped by Employee ID. On the right side, the 'Columns' panel is open, showing a list of fields with checkboxes to show or hide them. The fields shown are: Employee ID, Employee Name, Date, Day of the Week, Expected IN Time, Expected OUT Time, and Actual IN Time. The 'Pivot Mode' is also visible.

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.

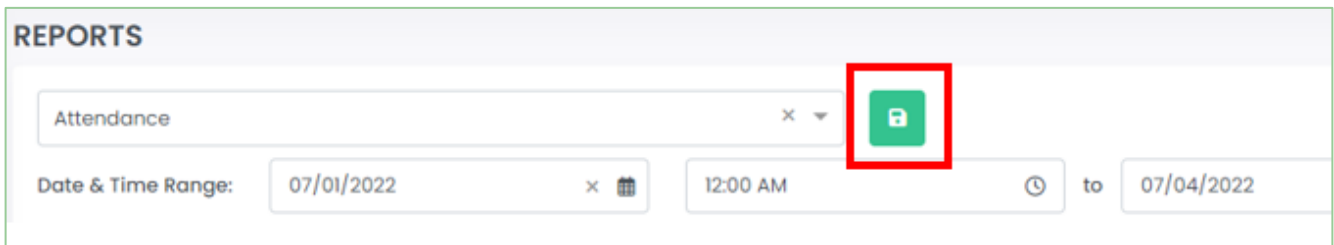
The screenshot shows the 'REPORTS' interface with a context menu open over the 'Day of the Week' column. The menu options are: Pin Column, Autosize This Column, Autosize All Columns, Group by Employee Name, Reset Columns, Expand All, and Collapse All. The data is grouped by Employee ID.

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

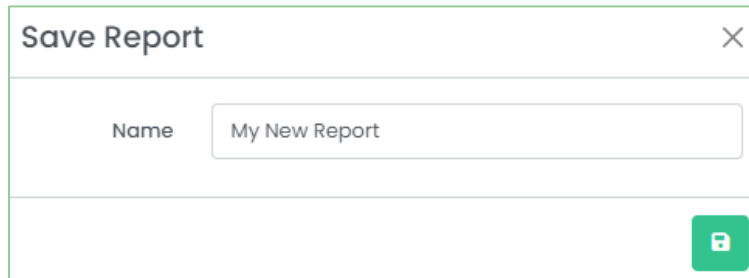
Saving a Report

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.

A screenshot of a "Save Report" dialog box. The dialog has a title bar with "Save Report" and a close button (x). Inside the dialog, there is a "Name" label followed by a text input field containing the text "My New Report". At the bottom right of the dialog is a green square button with a white floppy disk icon.

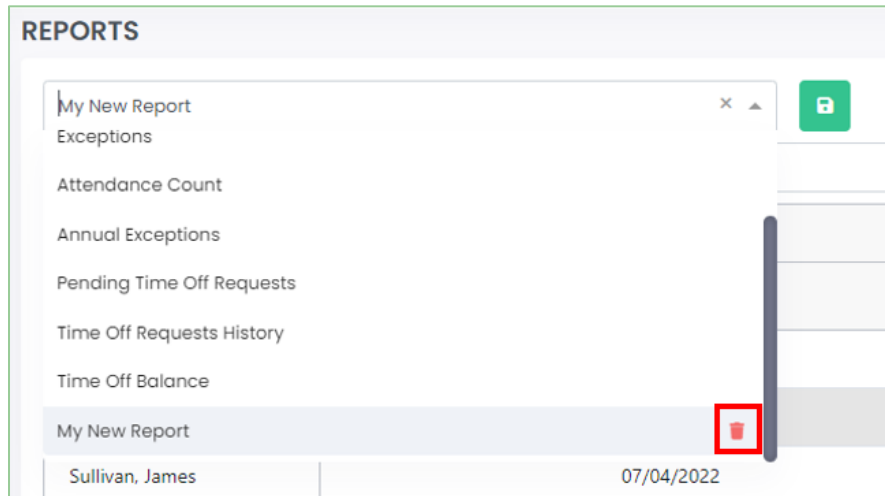
4. Click the save button to save your changes.

Deleting a Report

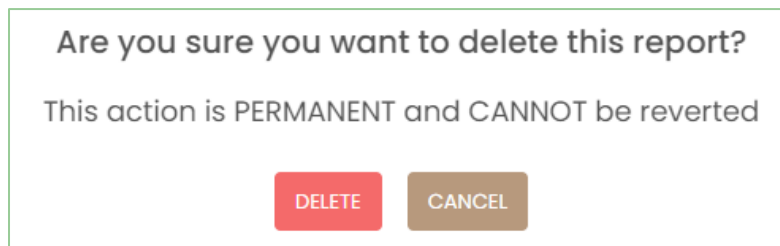


You can only delete a report that you've created. You cannot delete a report that another user created, and you cannot delete the standard reports that are provided for you.

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.

Contact Paymate Support

Before you contact the Paymate support team directly, please contact your system administrator 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/>

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

