Clarity - Web TnA Setup User Guide

Using the Web TnA

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Web TnA Setup In Clarity

Although Web TnA users will log into web time and attendance through the web browser based interface, all setup and administration of the web time and attendance is done through the Clarity interface.

Company Level Setup

The setup options for web time and attendance are:
- Company Calendar: Indicate holidays that can be used when processing timesheets.
- Work schedules: Define start and stop times by day of the week as well as grace periods (how long before or after a scheduled time an employee can clock in or out. Schedules can also be associated with specific job centres and cost centres. Rounding options are also available.
- Overtime rules: Daily overtime, weekly overtime and overtime based on number of consecutive hours worked can be set by overtime rules. Clarity does not require the use of overtime rules.
- TnA Groups: Every employee using Clarity web time and attendance will be associated with a TnA group. Employees cannot be given a web user account without it.
- Payroll Categories: Before you can use web time and attendance, review your payroll categories and decide which categories (such as hourly pay), should be accessible through the web time and attendance system. For each of these codes, on the General tab (in Setup > Payroll settings > payroll categories), the 'Used for attendance' flag must be checked. Categories used for time and attendance should be unchecked for both job costing and payroll quick entry.

Company Calendar

Set up your company calendar in 'Configuration > Company > Holiday calendar'. You can click on a day and mark it as a holiday or you can right click and choose 'Holiday . . .' and name the holidays as you set them up.

Create Work Schedules

Multiple work schedules can be created. Work schedules will be associated with particular TnA groups.
Navigate: Go to Setup > Attendance settings > Work schedules. Click '+'.
Enter Work Schedule details: Enter the details for the work schedule you are creating.
- Details tab
- Code: Enter any value with alpha or numeric characters under 20 characters in length.
- Name: Enter any value with alpha or numeric characters under 100 characters in length.
- Grace period: For the schedule you are creating, enter the clock in and clock out 'before' and 'after' values if appropriate. These values are regular clock times. For example, if the normal start time is 8 AM, you might enter '07:45' and '08:15' here to allow for a fifteen minute grace period on both sides of 8 AM.
- Default time rounding rule: Indicate the minutes for rounding.

Schedule tab

Adding records: add a record for each day of the week as appropriate. You can indicate start and end times, lunch and breaks and start and end times for lunch and breaks.
Save your entries: Once all the entries have been done for each day of the week, save the schedule.

Create Overtime Rules

Overtime rules can be created and, along with work schedules, can be associated with particular TnA groups.
Navigate: Go to 'Setup > Attendance settings > Overtime rules'. Click '+'.
- Enter overtime rule details: Enter the details for the specific overtime rule you are creating.
- Code: Enter any value with alpha or numeric characters under 20 characters in length.
- Name: Enter any value with alpha or numeric characters under 100 characters in length.
- Set rules: Click on 'Add record'.
- Day: Choose a weekend day, 'weekday' or 'statutory holiday'.
- When the rule will be applied
  - After completed compensation daily hours: This option will apply overtime based on when the employee has completed a number of hours as indicated on the master paycard daily hours (Employees > Master Paycard > Compensation summary tab > Daily hours field.
  - After completed compensation weekly hours: This option will apply overtime based on when the employee has completed a number of hours as indicated on the master paycard weekly hours (Employees > Master Paycard > Compensation summary tab > Weekly hours field.
  - After completed work schedule daily hours: This option will apply overtime based on the work schedule rather than the employee master paycard. See work schedules, above.
  - From the first hour worked: If overtime is not specific to the employee's daily hours, you can use this option to create a default number of hours, such as indicating that overtime starts after 8 hours no matter which employee it is.
- Hh:mm: Enter the number of hours to which the overtime will apply. For example, if the setting is for hours after 8 hours in a day up to 12 hours, enter 4:00 hours.

- Overtime category: The overtime category that this rule applies to. To qualify, a code needs to be set to the 'Overtime' formula type AND be set as 'Used for attendance' in the 'Flags' on the 'General' tab.

Setup TnA Groups

TnA groups can be associated with a schedule or with a particular overtime rule set. It is not required, however, and a TnA group with no associated schedule or overtime rule can be created. TnA groups are necessary as an employee must be associated with a TnA group before a user account for that employee related to web TnA can be created. Click on '+' to create a TnA Group.

- Code: Enter any value with alpha or numeric characters under 20 characters in length.
- Name: Enter any value with alpha or numeric characters under 100 characters in length.
- Timesheet period type: This value does NOT need to correspond to
- Timesheet period start date: This field works in conjunction with the prior field so that Clarity will know when the period starts. The exact date chosen here is immaterial if you are using weekly for the 'Timesheet period type', for instance. What would matter in that case is the day of the week chosen. Be sure to choose a date that is not in the future.
- Default start time: Use this field if you are auto generating time entries based on the employee's master paycard and not using a schedule.
- Work Schedule: Based on what has been previously set up, choose the work schedule that applies to this TnA group. A single work schedule can be applied to multiple TnA groups if needed (to allow for different work weeks or differing overtime rules, for example).
- Auto generate time entries: Clarity can generate time entries by default, based on the work schedule. Choose how the entries should be generated, either by day or by timesheet period.
- Enable overtime/Overtime rule: Use these fields to apply a specific, previously generated overtime rule to this TnA group.

Click the check mark in the upper right corner of the screen to save this TnA group. You can now apply any of the TnA groups you have created to employees and create user accounts for employees.

Employee Level Setup

Employee setup for TnA usage is in two parts. First, setup the employee's TnA information, then add the employee as a web TnA user.

Master Paycard Setup

The web TnA system bases overtime on the settings on the employee's master paycard. If an employee is subject to an overtime rule that involves either 'compensation daily hours' or 'compensation weekly hours' then be sure that these values are filled out on the 'Employees > Master paycard > Compensation summary' tab.

Employee TnA Information

Open the TnA Information screen: Select 'Employees > TnA Information'.

- Assign the employee to the appropriate group: Select the appropriate employee on the 'List' tab. On the 'Detail tab', choose the TnA group that the employee belongs to. You cannot leave this field blank. Each employee that is assigned TnA information and a TnA login must belong to a TnA group.
- Overtime settings: By default, the employee will be set up to use the TnA group settings for the group you have assigned him/her to. If you want to override for a specific employee, uncheck the box and indicate which overtime rule applies to this employee. Not that it is possible to uncheck the 'Use TnA group settings' box and leave the 'enable overtime' box unchecked to make an employee not subject to overtime.
- Swipe Card identification: You can enter the employee's swipe card identification number here for reference or custom reporting.

Web Users – Security

To set up an employee as a web user, select 'Configuration > Security > Web users'. If the employee is assigned to a TnA group, you will be able to select the 'Detail' tab and check the 'Is Tna user' check box.

If you want the user to be able to change their password on the first login for security reasons, you can check the check box indicating so. Enter the user's login name and initial password. To indicate the security rights of the user, select which group applies. It is recommended that administrators set up users with each type of group to verify that the rights are what is expected before putting actual users into a specific group.

- Approvers
  - Approvers in Clarity web time and attendance are Managers. To enable a manager to approve an employee's timesheets first set up the approver as a manager by selecting 'Setup > Managers' and adding the approver to the list. Next go to 'Employees > Employee general > Organization' and change the manager drop down for all employees that will be approved by this manager to match the manager's name. Use the 'Alternate Manager' field for vacations and other times when an alternate approver is needed.

Time and Attendance Usage

Users are setup with rights in the Clarity interface. They can then access the Clarity time and attendance interface by opening their web browser and accessing SERVER\tna. This connection can be tested by accessing localhost\tna on the server that is hosting Clarity.

Employee Access

Once you have set up an employee with access, verify that the access is working as expected by using the assigned user name and password and logging into web time and attendance. The employee screens are designed to be easy to use with a minimum of controls that are easy to understand.

Web clocks and Timesheets

Employees can record their time either using the 'Web Clocks' interface to record punches as they log in or using the 'Timesheets' option. Either option will allow the employee to input job and/or cost centres that apply to the punch detail or timesheet entry that they are recording.

The employee can choose the cost centre and/or job centre needed and click on 'Clock In' on the 'Web clocks' tab if punching in at the moment. To record timesheet information the employee can click on the 'Timesheets' tab and select 'Insert'. An entry line will appear and the employee can record details as they pertain to the time entry that is being recorded.

The timesheets option also provides tabs to view current, submitted, approved and rejected timesheets. Once entries have been input then the submit buttons will appear, allowing the user to select some entries on the left and 'submit selected' or to submit all entries. There are also submit (green) and delete (red) buttons at the right end of each line.

Approvals

Approvals are handled on the 'Approvals' tab. A user can see timesheets waiting for approval if that user is properly set up. The history timesheets tab will show past records based on search criteria.

Processing Timesheets

When timesheets have been entered, submitted and approved, then it is time to add them to the database as paycards so that payroll can be calculated.

Select the timesheet period: Go to 'Time and Attendance > Select timesheet period. This will determine the dates for the entries that you intend to pull in to process payroll. The dates used here will usually correspond to the first date of a pay period and the last date. Some users might bring in entries a week at a time which would mean processing timesheets twice per pay period, but it is typical to process timesheets once per pay period.

- Batch or Edit entries: You can batch the entries to create job cost record entries or you can edit the time entries directly if you have the rights to do so. Edit records as needed and when ready, choose 'Time and attendance > Process time entries > Batch time entries'. You can select your sources for time entries at the bottom of the screen. Normal time entries are under 'TnA group settings'. Planned absences set up by employee through the 'Employees' and holidays added to the company calendar (under the configuration menu) can also be included. Click 'Next' and a review screen will appear showing the entries created from the first screen.
- Process the entries: Click on 'Create time entries'.
- Select pay period: If you have not yet, select pay period (Payroll > Select pay period). Note that Clarity is designed to process entries for time and attendance based on the selected pay period date range from select pay period. If the entries do not fall within the selected pay period, then the next step may not produce any entries.
- Batch the time entries into job cost: Select 'Payroll > Process job cost entries > Batch job cost entries'. Select the 'Create job cost entries based on time and attendance entries' option. Choose the options that apply. Click 'Next' and a screen will appear showing the entries that will be processed. Click 'Finish'. Your time entries now exist as job cost entries and they can be seen under 'Payroll > Job cost entries > Edit job cost entries'.
- Batch the job cost entries into paycards: Select 'Payroll > Process paycards > Batch payroll'. Although you can use other options in conjunction, for bringing in your time entries, select option 2. Create paycards ONLY for employees with job cost entries. Click 'Next', then click 'Run Payroll'. You can see your entries under 'Payroll > Process paycards > Edit paycards'. Because they are time and attendance entries, these entries cannot be changed. Entries must be edited as timesheets not as paycards.

Corrections and deletions

Time records can be deleted by the employee or the manager through the web interface. Clarity administrators can edit or delete (or add), time records through 'Time and attendance > Process time entries > Edit time entries'.

Once these records have been moved into job cost status (step 5, above), then they can no longer be edited. To delete them at the job cost phase (step 5), select 'Payroll > Job cost entries > Edit job cost entries'. You can delete

individual records using the minus button in the top right corner or you can delete all records by using the 'delete all' button at the lower left.

Once the records have been batched into paycards, they can be deleted individually under 'Payroll > Process paycards > Edit paycards'. ALL un-posted paycards (including any that were not generated using the above process), can be deleted using 'Payroll > Delete all paycards'.

Absence Tracking

Absence Tracking in Clarity is accessible if the user has the Human Resources or the Time and Attendance Modules. It is utilized in the Payroll, Human Resource, Time Attendance and Employee self service modules in different capacities and purposes. For access to all the features available in Absences Tracking all four modules of Clarity must be used. Setup must be done under the configuration menu of Clarity to define the absence types. These must then be assigned manually to each employee under the employeesAbsence menu and rolled over annually under the Year End menu.

Absence Types

There are two types of absence types within Clarity defined as "Long Term" and "Short Term". Long term absences are those that are typically taken in bulk blocks of time. These absences are not tracked on a hourly definition in any shape, are not paid and do not affect/contribute to the employees payroll calculations. Examples of long term absences are:
Maternity or Parental Leave
Disability Leave

Long term vacation/sabbatical

Short term absences are those that the company tracks down to the hourly definition and may also be paid. In order for an absence to be paid within Clarity it must be defined as a short term absence type. These absences can have entitlements to dictate the amount of time allowed to be taken and strictly enforced by the software. Examples of short term absences are:

> Vacation Time
> Sick Time
> Banked Time
> Jury Duty
> Training Time
> Database Access

You can access the details of the absences that you define in the system by connecting to the "ABSENCE_TYPES" table. This table has the following fields:

Field	Type	Description
ID	Integer	ID field
Code	String	User defined code to be used for custom reports and filters
Name	String	User defined name/description of the absence
Type	Char(1)	S = Short Term; L = Long Term
Color_Code	Integer	Numeric code reference for the colour ID
ENTER_TYPE	Char(1)	H = Hourly (only option)

Recording Absences - Employee Self Service

Employee self-service is controlled by giving user groups access. See 'Security' and 'Users' for more information. If your organization does not prefer to allow users to change certain options, then security groups must be set up to control those limitations. Employee service provides the following options:

Reports

A year-to-date or payment history report can be generated here by the employee.

Employee Profile

- General Information: This includes address information, phone number information and e-paystub password information.
- Emergency contact: Multiple emergency contact records can be entered.
- Absence request: This option enables employees to request time off based on which codes are set up as useable for time off in web time and attendance.
- Employment History/Training/Education/Benefit/Incident/Performance review: These options are always view only regardless of the rights given to the employee.

Using the Web TnA application – Manager and Employee Self-Serve:

There are two employee types who will access the web Tna. Employees will be able to see their own information as well as make requests for Time Off (absenteeism) and Managers will be able to generate time cards as well as approve the Time Off requests of their own employees.

This part of the manual will concentrate on the information the employee will see and what he/she can do within the application.

Log-in Screen:

All users will see the above 3 fields when first going to the employee log-in website. They are all case sensitive and your Clarity System Administrator will tell you what you must enter here. If you click the "Remember Me: setting, the program will remember the User name and Company name next time you come back. If you don't select to "Remember Me" you must enter values for all three fields next time you return to this page.

Manager's Log-In:

Managers must open employee timesheets for each new period. The manager has the ability to generate timesheets for a single person or for all employees they have access to.

By default, you will always be taken to the Current timesheets window. This is for your own record only.

If you are entering absenteeism requests for your own record, this is the screen where you will enter your own Absence request by clicking the Add absence button.

To create Timesheets for employees, select the Generate link.   You will be taken to a list of employee records.

<h1 style="color:blue">Timesheets – Generate</h1>

From the Generate screen, Managers can auto-generate time worked entries or record Company Holidays (stat) for employees.

At the top of the screen will be a Date from and To. This is the period you will generate a time sheet for.   The default is semi-monthly.   If you want to expand the default date range, change the default from and to date values.

- To generate Time Worked entries, select For TnA Group Settings
- Planned Absences will never be used by SCCU
- To define Statutory Holidays as paid, select Company Holidays

<h2 style="color:blue">Generate options:</h2>

Whether you are choosing For TnA Group Settings or Company Holidays, these are the generate timesheet options available:

- To generate Timesheets for all employees, select the Generate All.   This will create time cards for all employees.
- To generate timesheets for a single person, select the Generate link beside his/her name.
- If you want to generate timesheets for a group of employees, click into the box beside their name, this will put a check mark in the box.   When you have finished selecting employees, click Generate Selected.

You will be taken to a Timesheets generation results window.   If you selected Generate All, it will show for all employees, otherwise it will show for the single employee or the group of employees you selected.

After clicking OK, you are taken to the Pending Timesheets.   Now you can modify the employee timesheet records you created.

<h1 style="color:blue">Pending Timesheets – time worked:</h1>

Click Search and you will see the total work hours you generated for the employees you manage.

Pending timesheets - Modifying Default Hours:

When generating timesheets, the default is the employee worked full time based on the daily hours worked on his /her compensation summary.   After the timesheets have been generated the manager can now modify individual employee records to change the default work hour's worked amount.

All Employees - Approved

If all the time worked is correct, click Approve All.
That might not be realistic and each person might require some update, or a small group might need changes.

Single or Group of Employees - Approved

If you have one or two employees that you need to modify their hours worked and the rest of the employees should be approved, it is easier to approve them first and then modify the others.

When you click into the column to the left of Action for any employee, you will put a check mark in the box and it means you have selected the employee record.   Click Approve Selected and only those you chose will be approved for the hours worked.

Single Employee – Change

To change time worked entries for an employee, click on the person's name.   You will be taken to a screen showing all the entries for the time period you generated the time card for.

If an employee didn't work a day, click the red x under the Action column.   This will delete the entry.
If an employee worked different hours than the default value, click into the Hours and change it for each day he/she worked.
If an employee worked a day that is outside the default range you can Insert a new Time Worked entry to record it.

If an employee had an absence instead of the time worked entry that is created, the manager must delete the time worked entry first and then click the Add Absence button.

Add Absence:

Using the Add Absence allows you to record vacation, health and welfare or other types of absenteeism.
You must choose an Absence Type
If the Start and End Dates are different than the default value, change them accordingly (the system will calculate the total time off).
If there are additional comments, then enter and click Insert to save the record.

Recording Stat Holidays:

If you want to enter Stat Absences for all employees, select Time Sheets/Generate.

Select Company Holidays and if any stat days are within the date range at the top of the screen, you will see it show with the Date/Description/Type

Generate options:

Whether you are choosing For TnA Group Settings or Company Holidays, these are the generate timesheet options available:

- To generate an absence entry for all employees, select the Generate All.   This will create absence records for all employees.
- To generate a stat absence for a single person, select the Generate link beside his/her name.
- If you want to generate a stat absence for a group of employees, click into the box beside their name, this will put a check mark in the box.   When you have finished selecting employees, click Generate Selected.

You will be taken to a Timesheets generation results window.   If you selected Generate All, it will show for all employees, otherwise it will show for the single employee or the group of employees you selected.

After clicking OK, you are taken to the Pending Timesheets.   Now you can modify the employee absence records you created.

Pending Timesheets – Holidays (recording stat holidays):

Click Search and you will see the total work hours you generated for the employees you manage.

After the absence timesheets have been generated the manager can now Approve All to finalize the creation of the absence entry for the stat holiday.

Employee Profile

The employee personal information and absence entitlements can be seen from this screen.   It is a view only module.

Training

The training courses employees have taken can be seen under this Module.   It is a view only module.

Employee Self-Serve:

This module is used by employees to view their own records only.   Employees are able to enter absenteeism requests for time off and add/change Emergency Contact information.   Absenteeism requests employees enter can be modified/deleted by employees until it has been approved.   As soon as a record is approved, employees can no longer make changes.

When the web TnA program opens, the employee goes right to his/her own current timesheet.

Clicking Add Absence will allow the employee to create an entry.
The Absence Type must be selected
The Start and End dates must be correct (the program will calculate the total)
Click Insert to complete.

The employee will see the entry until the manager has approved it.

The manager must log into the program and generate a timesheet for the employee in order to approve the absence request.