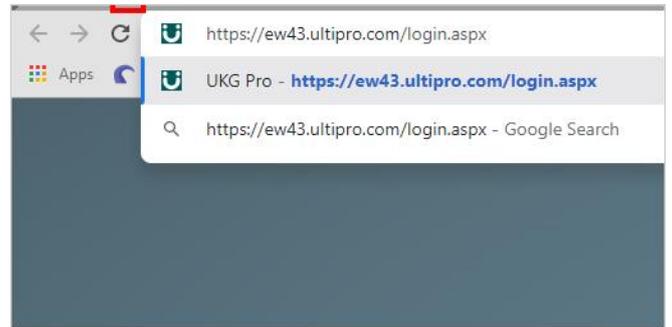


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1. Logging Into the Live System

Go to the following web address:
<https://ew43.ultipro.com/login.aspx>



Enter in your username in the 'User name' box.

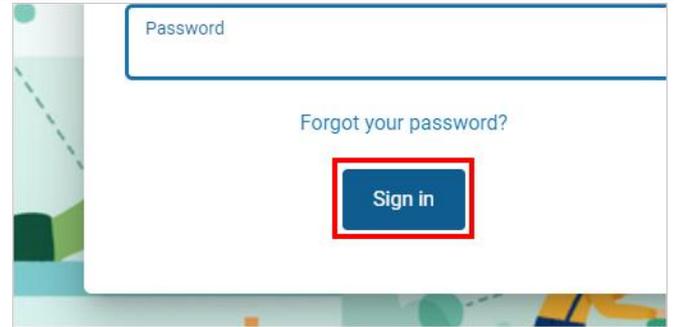


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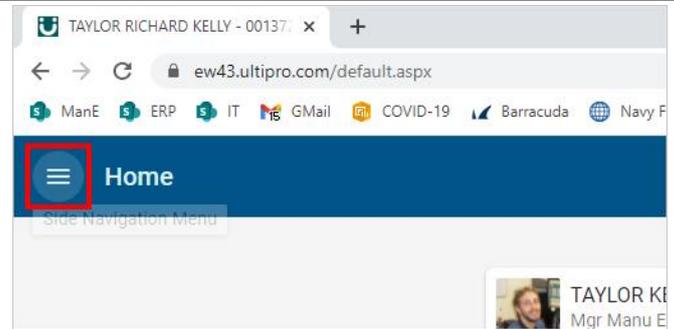
Enter in your password in the 'Password' box.



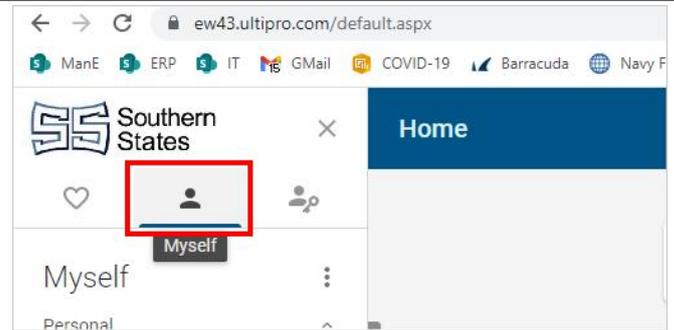
Click on the button **Sign in**



Click on the 'Side Navigation Menu' in the top left corner. This is the icon that looks like a hamburger.



Select the 'Myself' tab.

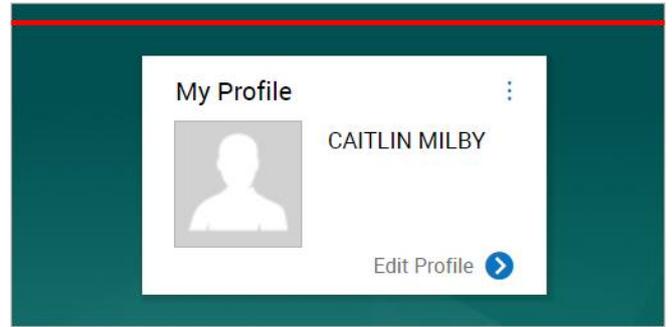


Select the 'Workforce Management' option. You will need to scroll down to find this option.



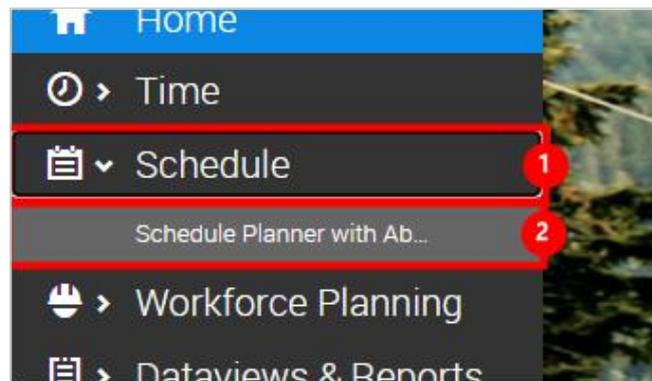
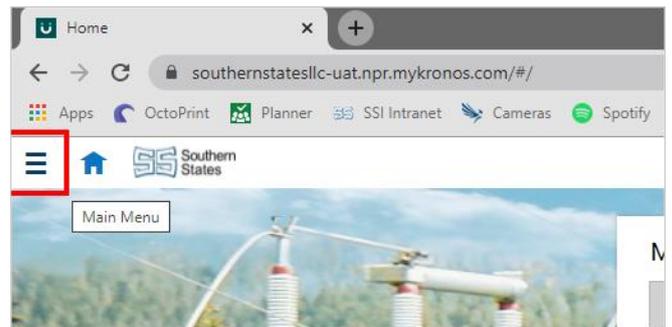
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You are now logged into the system.



2. Navigating to Timecards

Click on the button **Main Menu** in the top left of the screen.

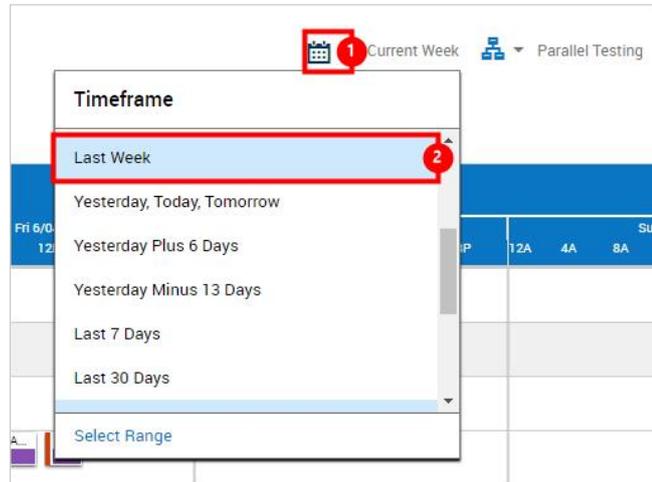


1. Click on the Schedule tab.
2. Click on the link **Schedule Planner with Absence Calendar**



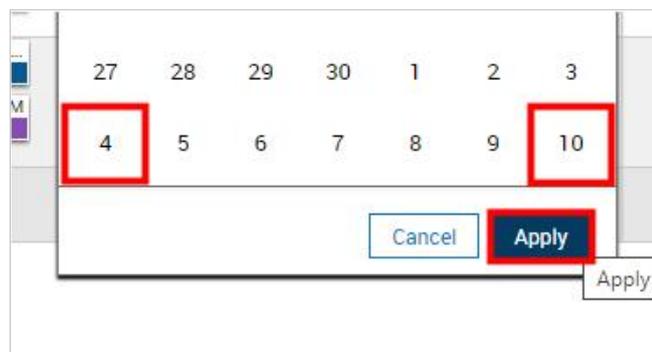
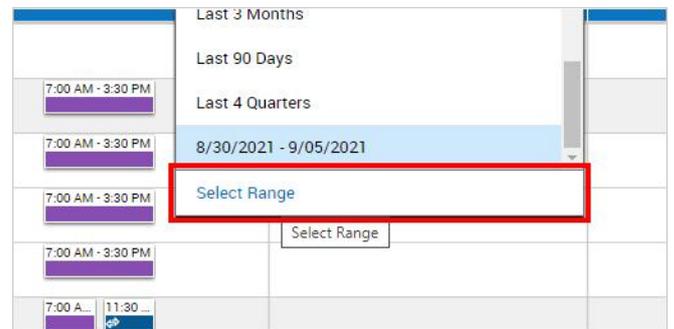
- You should now see all your assigned employees and their schedule for the week.

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1. If you want to look at specific time periods, such as this week, next week, etc., click on the **Current Week** button.
2. Select the time frame you would like to see displayed.

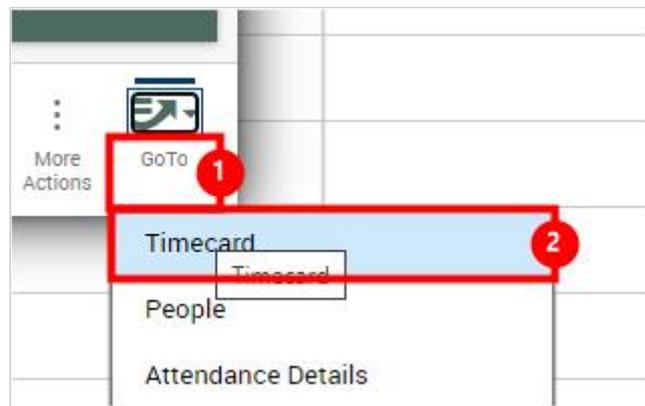
You can even select a range of dates by selection **Select Range**.



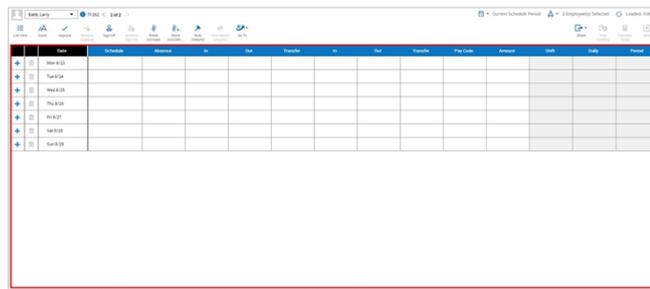
- Select the dates you want to see.
- Click on the button **Apply**. You will now see this timeframe.

<input checked="" type="checkbox"/>	ADAMS, MELISSA
<input type="checkbox"/>	Allelujah, Martin
<input type="checkbox"/>	Anglea, Ben
<input type="checkbox"/>	Ausborn, Elizabeth
<input checked="" type="checkbox"/>	Babb, Larry
<input type="checkbox"/>	Rains, Narinder K

- Check the box next to the employees that you want to see.
- Right click one of the selected employees.



1. Click on **GoTo**
2. Click on the button **Timecard**



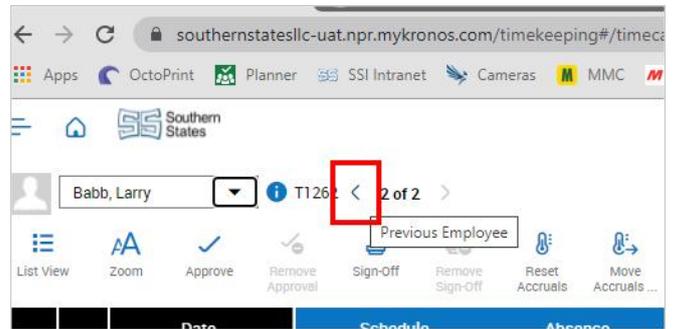
- You will now see the timecard for one employee at a time.

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- To navigate through the selected employees, you can click on the drop down menu in the top left.
- From here, select the employee that you want to see next.

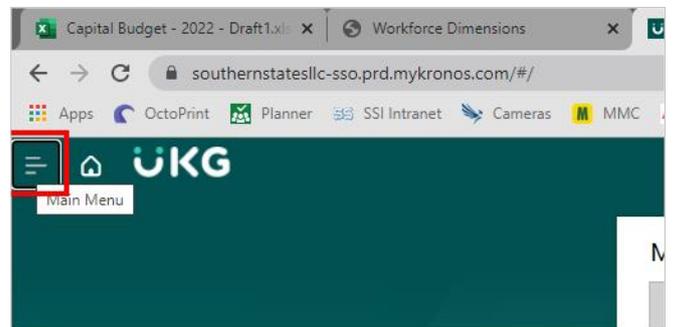
You can also use the arrow keys next to the drop down box to move through the selected employees in order.



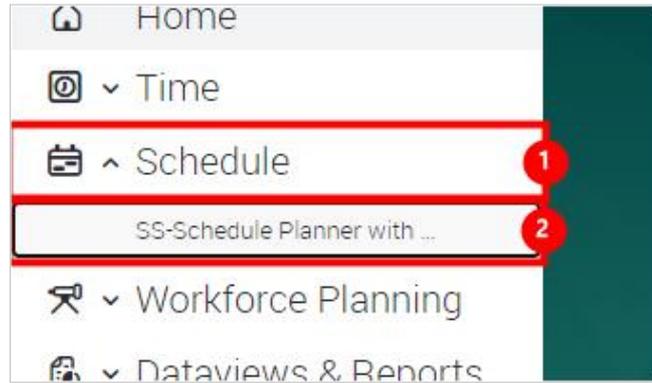
3. Advanced Schedule Planner Searches - Hyperfinds

This tutorial is about advanced searches called 'Hyperfinds.' Specifically, this is regarding Hyperfinds under the Schedule Planner with Absence Calendar.

Navigate to the Schedule Planner with Absences page. Click on **Main Menu** in the top left of the screen.

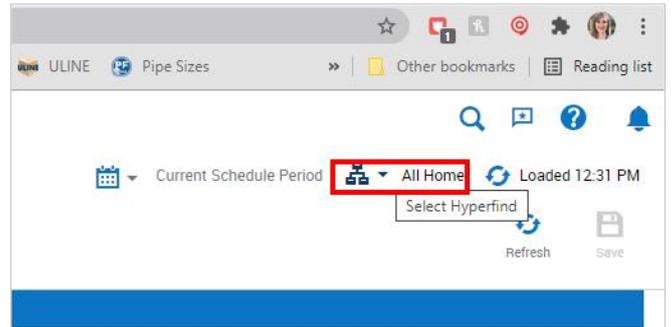


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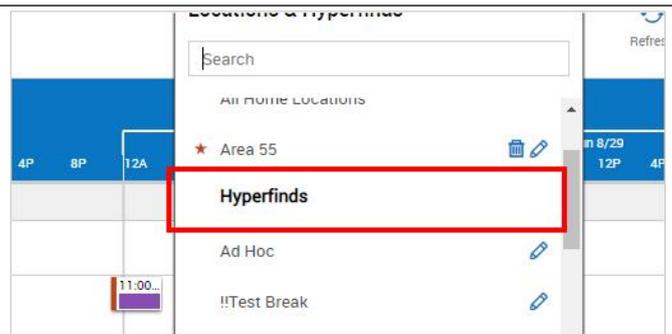


1. Click on the Schedule tab.
2. Click on the link **SS-Schedule Planner with Absence Calendar**

To open a hyperfind, click on the Hyperfind button in the top right. It has a pyramid icon next to it.



Under the bold **Hyperfinds** header, you can see premade hyperfinds to narrow down employees.

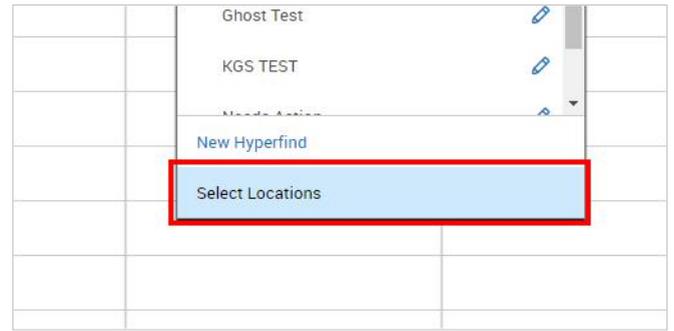


For example, shifts exist already exist as Hyperfinds. If you select **1 Shift**, it will only show employees on this shift.

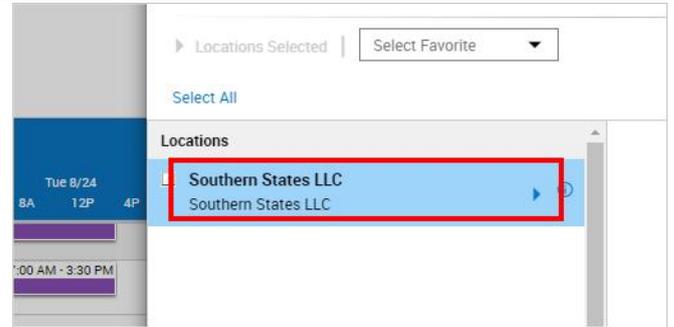


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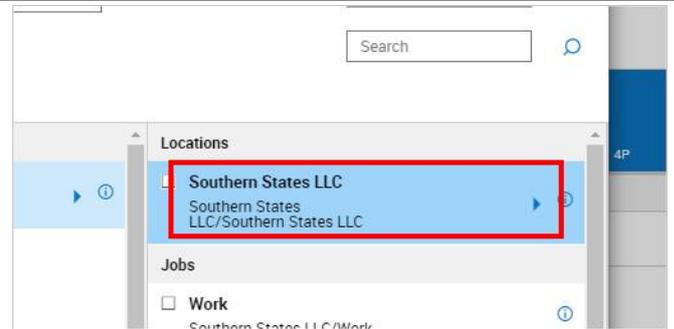
If you want to look for employees in a specific department, or even a specific job in that department, you can scroll to the bottom of the Hyperfinds tab and click on **Select Locations**.



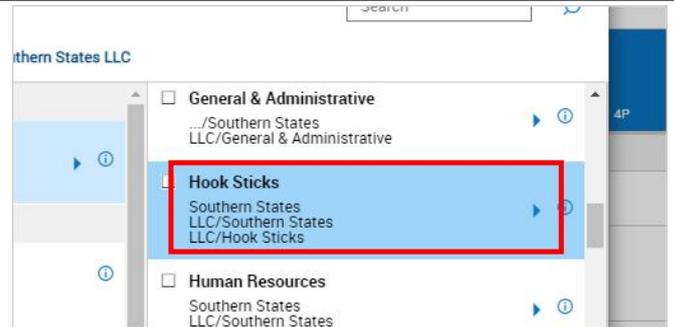
Select the arrow on Southern States option.



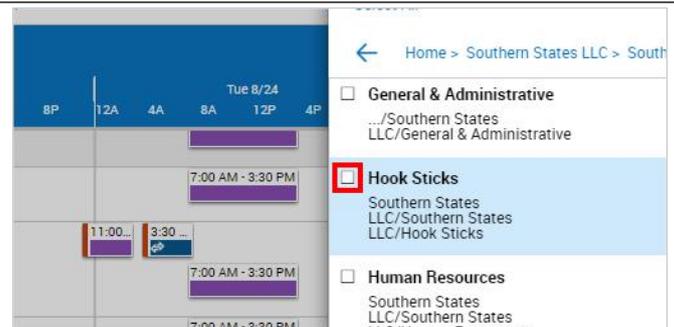
Select the arrow again on the next Southern States option.



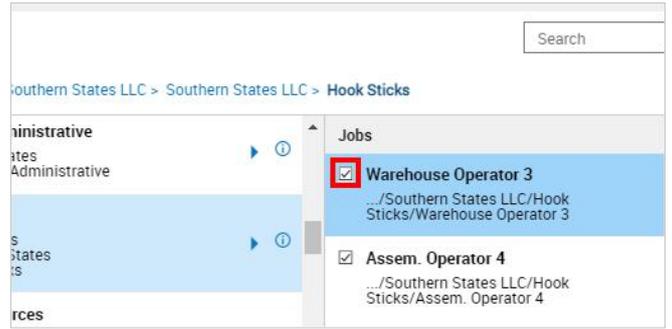
Click the arrow on the department you want to see jobs for.



If you want to select all of that specific department, click on the checkbox next to the department in question.

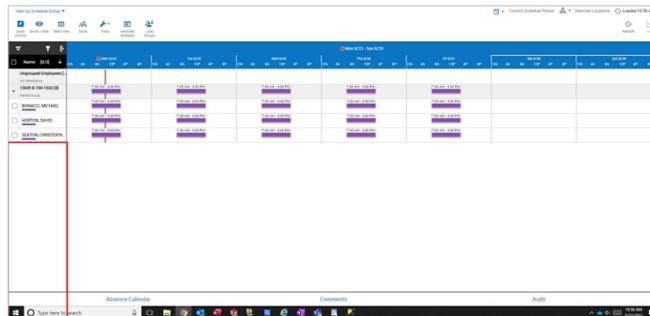
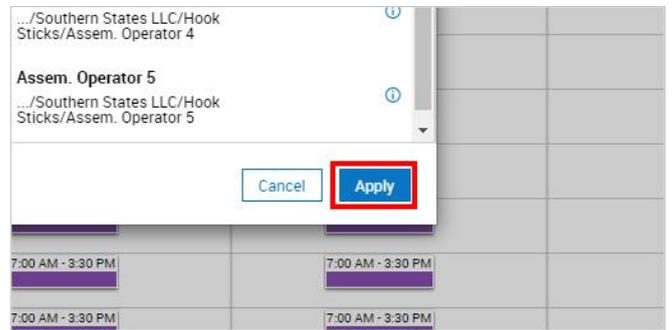


If you only want specific jobs, check and uncheck the boxes within that department to get the desired results.



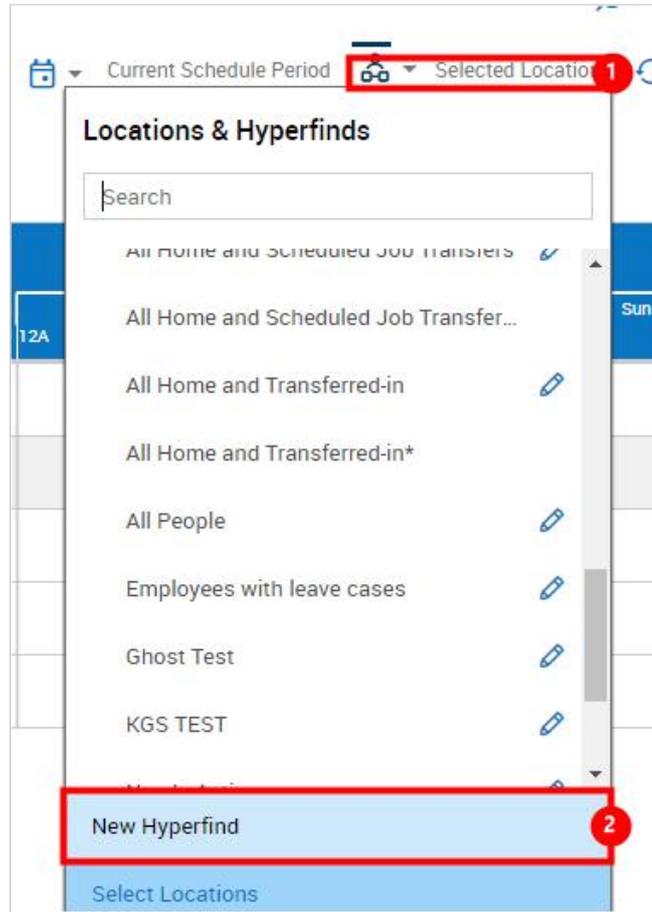
- The top of the hyperfinds page should now show you what information you are requesting.

Click on the button **Apply**



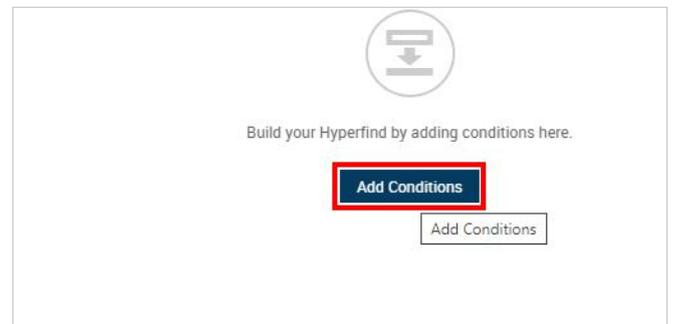
- The only employees that should be appearing now are the ones that fit your criteria.

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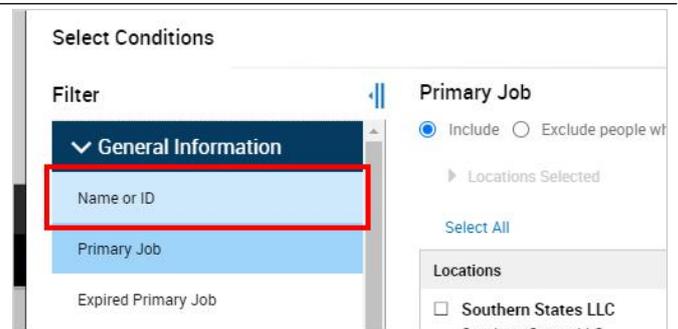


1. If you want to look up specific employees based on last name, employee ID, or similar information, click on the Hyperfinds button again.
2. At the bottom, select the **New Hyperfind** key.

Click on the button **Add Conditions**

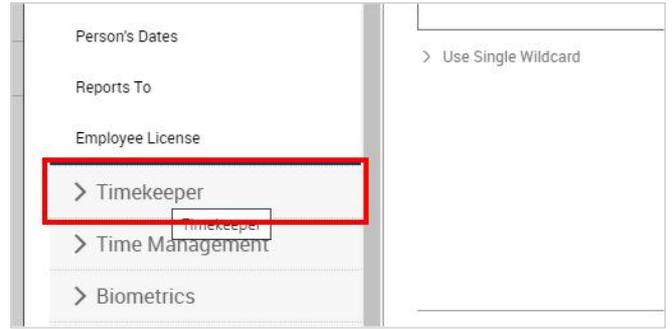


You can select options from the lefthand side.

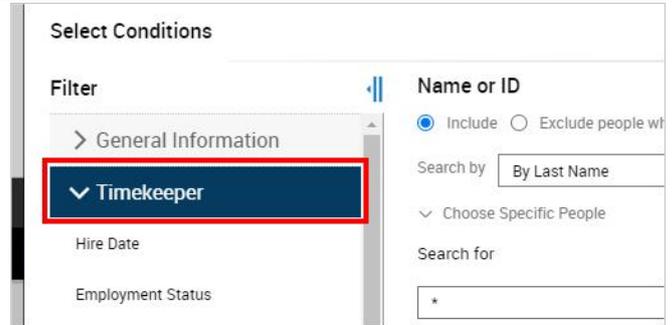


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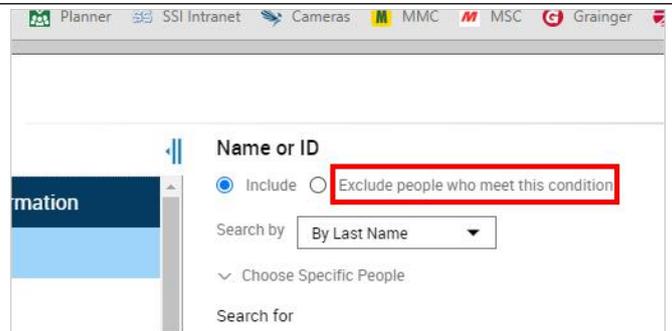
There are different tabs for different categories of information.



After finding the field you want on the left, select it.



You can choose to see employees who do and do not meet this criteria.



- If you select the Search By drop down, you narrow down what you want your search to include.



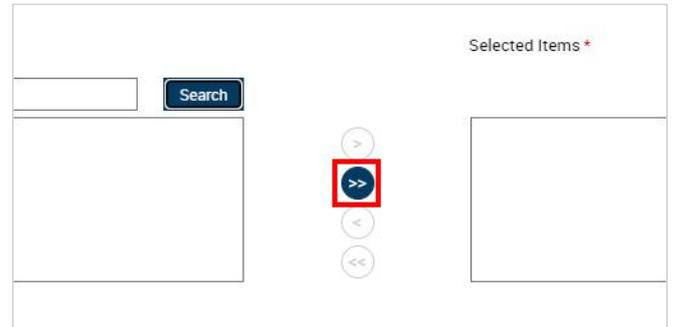
1. Click on the **Search** field and enter the text you want to search for. The '*' at the beginning allows it to

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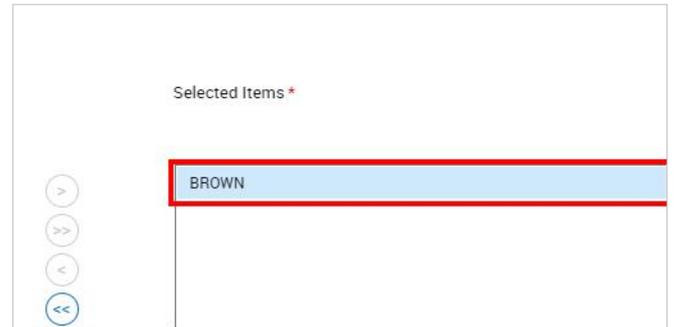
look for anything that may come before the text you enter. If you only want to put part of the name, and leave the end open, you can also end with a '*'. For example, entering *Brown will show all employees that have Brown as the last part of the name. If you type *Bro*', it will show any name that has Bro in it, such as Brown, Brock, or Brook.

- Click on the button **Search**

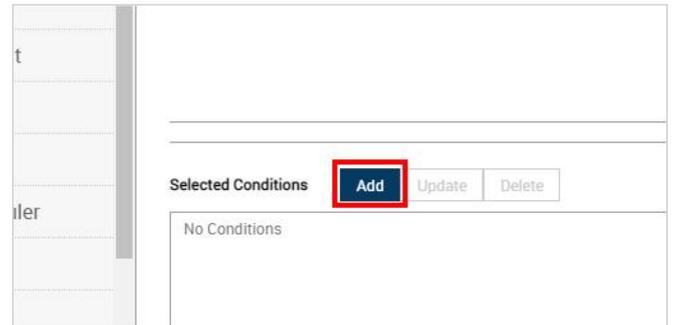
Click on the arrow button to add it to the 'Selected Items.'



Confirm what you want is in this table.



Click on the button **Add**

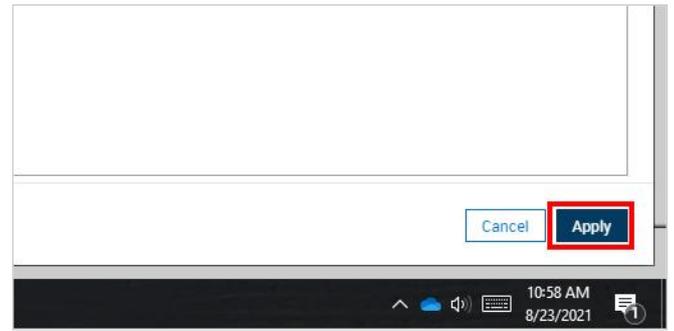


This will show you what your hyperfind will be looking for.

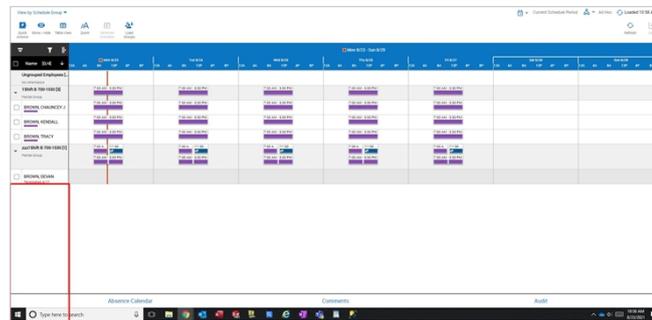
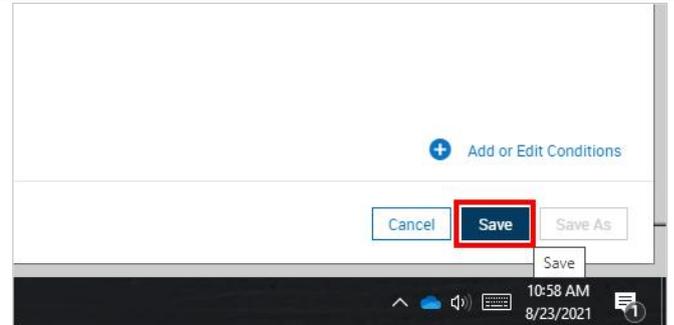


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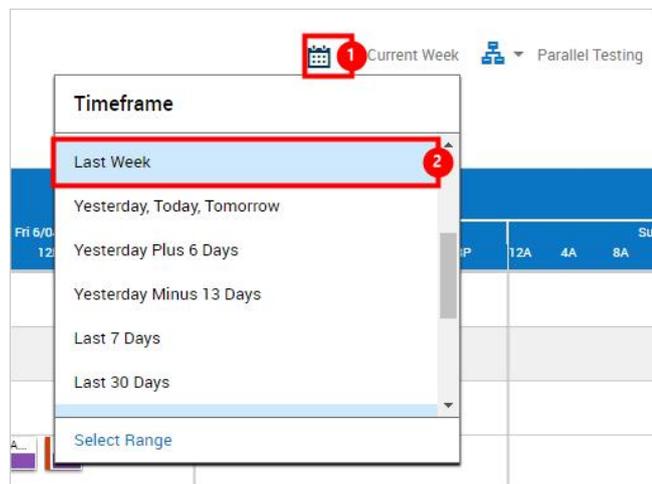
Click on the button **Apply**



Click on the button **Save**

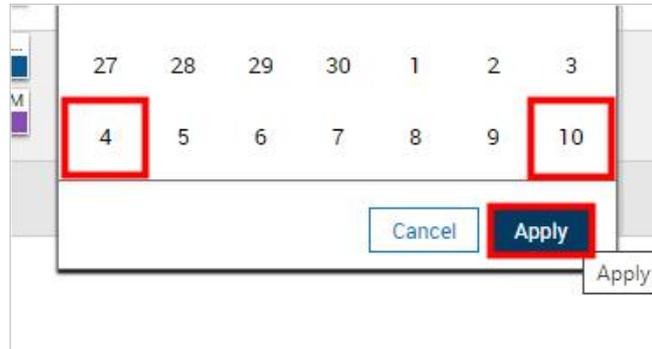
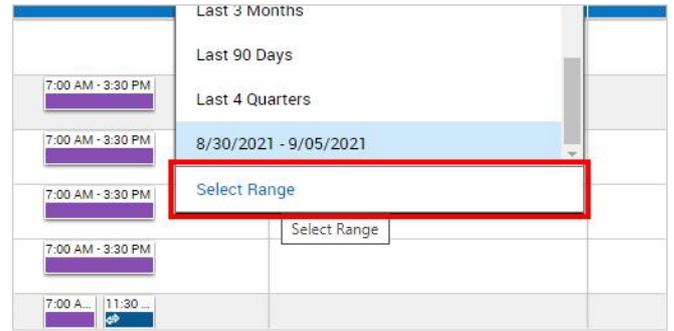


- You should now see the employees that fall into this category.



- If you want to look at specific time periods, such as this week, next week, etc., click on the **Current Week** button.
- Select the time frame you would like to see displayed.

You can even select a range of dates by selection **Select Range**.

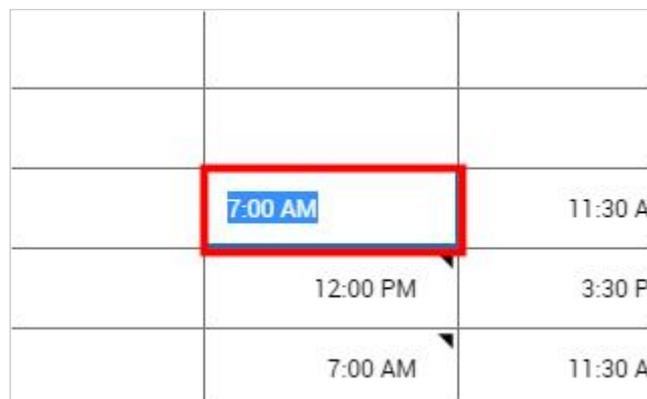


- Select the dates you want to see.
- Click on the button **Apply**. You will now see this timeframe.

4. Correcting Time Punches



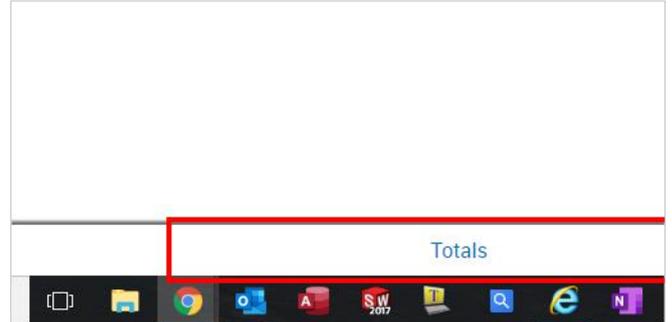
1. Navigate to the employee timecard. If you're looking at a dataview or the schedule calendar, right click the employee you want to edit.
2. Click on the button **GoTo**
3. Click on the button **Timecard**



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1. Select the punch you want to edit. We selected **7:00 AM** on Tuesday. - Key in the corrected time and hit enter. You can do this to multiple punches, and at the beginning and end of lunch as well.

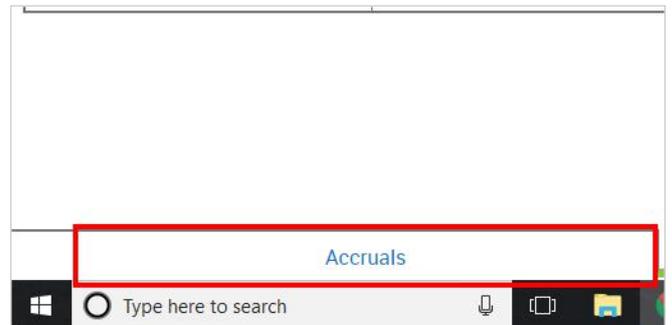
If you want to check the totals for the week, and what was calculated as Regular time, OT, DT, Vacation, etc., you can click the **Totals** button on the bottom of the screen.



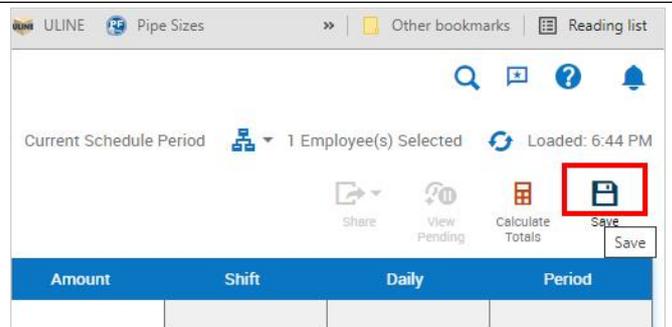
4	Pay Code	↑5	Amount
	ISS-REG		40.00
			40.00

- This will show you how many hours they were paid at the specific paycode, such as regular.

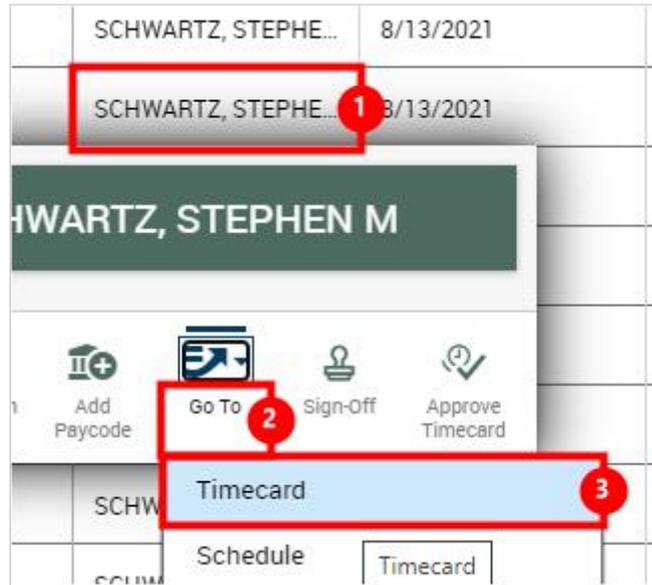
You can also see their Accruals balance by clicking on the **Accruals** tab on the bottom of the screen.



Click Save in the top right.

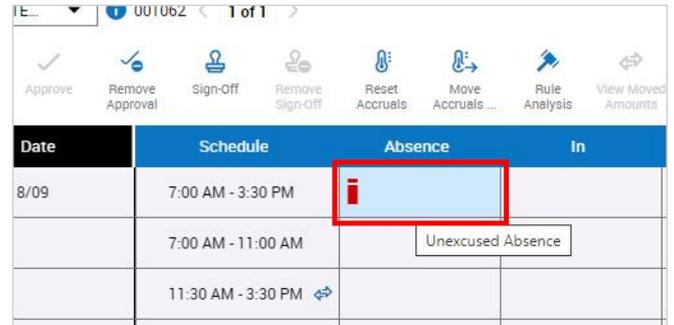


5. Assigning Absence Codes

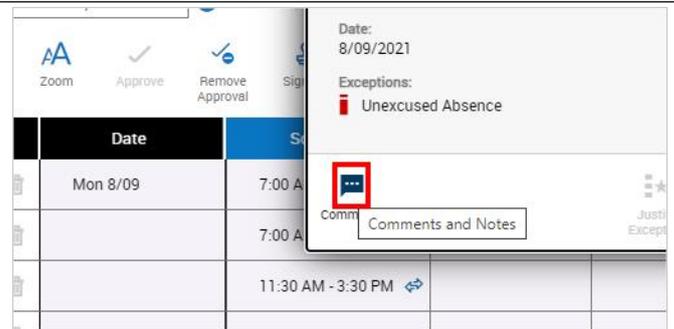


1. Navigate to the employee's time card. If you notice an issue when reviewing the weekly dataview or browsing the weekly schedule, you can simply right click the user.
2. Click on **Go To**
3. Click on the button **Timecard**

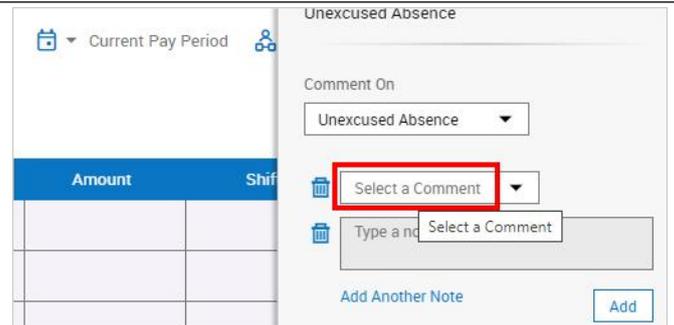
If you want to apply a code to an absence specifically, right click the corresponding day's red mark in the 'Absence' column.



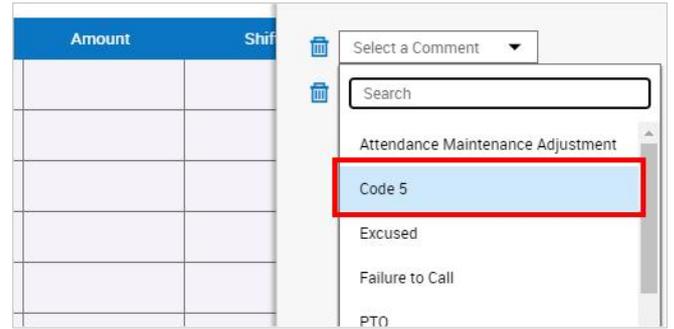
Click on the button **Comments and Notes**



Click on the input field **Select a Comment**



Select the 'Code 5', or other applicable code for this day's absence.



Select a Comment

Search

Attendance Maintenance Adjustment

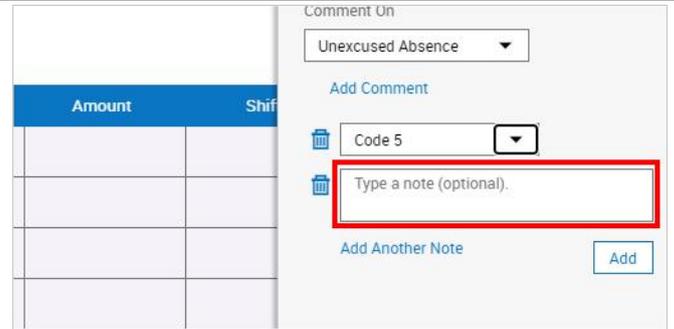
Code 5

Excused

Failure to Call

PTO

Be sure to include a note describing the event.



Comment On

Unexcused Absence

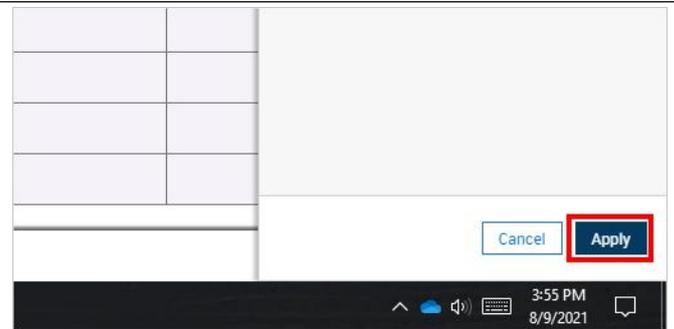
Add Comment

Code 5

Type a note (optional).

Add Another Note Add

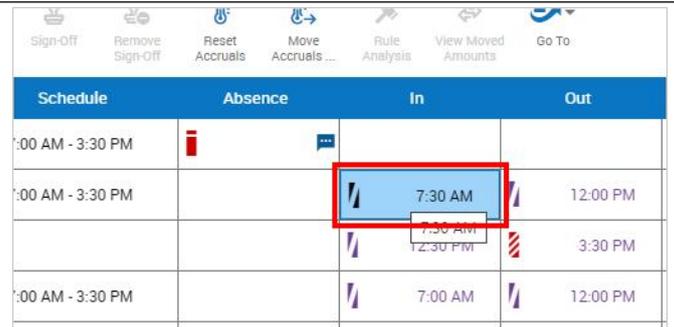
Click on the button **Apply**



Cancel **Apply**

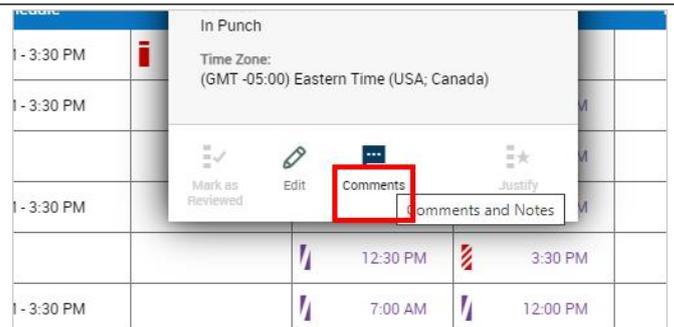
3:55 PM
8/9/2021

If you need to apply a tardy or lunch infraction, right click on the punch that you want to apply this to.



Schedule	Absence	In	Out
7:00 AM - 3:30 PM			
7:00 AM - 3:30 PM		7:30 AM	12:00 PM
		7:30 AM 12:30 PM	3:30 PM
7:00 AM - 3:30 PM		7:00 AM	12:00 PM

Click on **Comments**



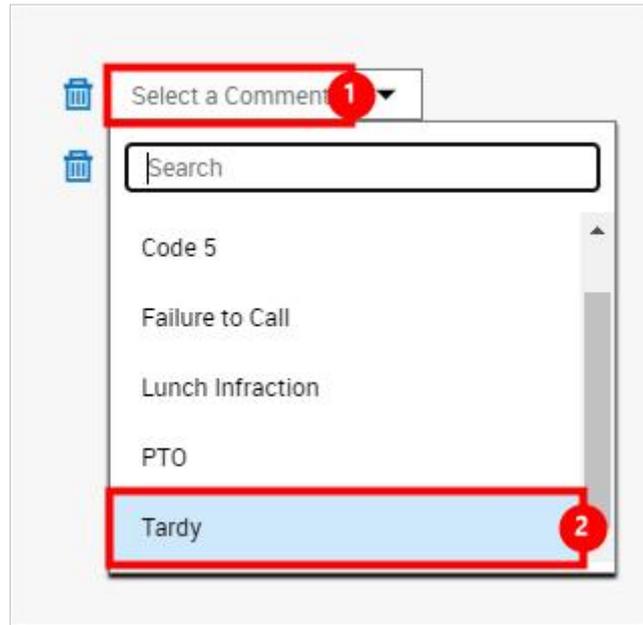
In Punch

Time Zone:
(GMT -05:00) Eastern Time (USA; Canada)

Mark as Reviewed Edit **Comments** Justify

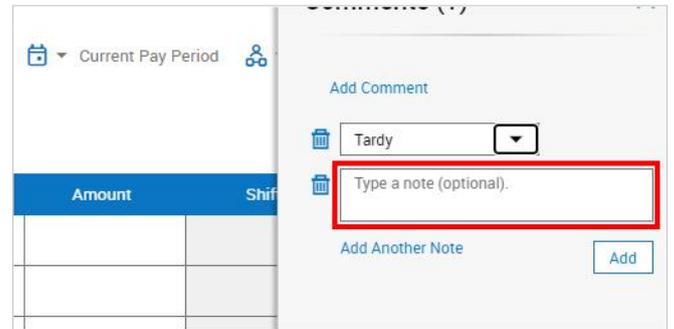
Comments and Notes

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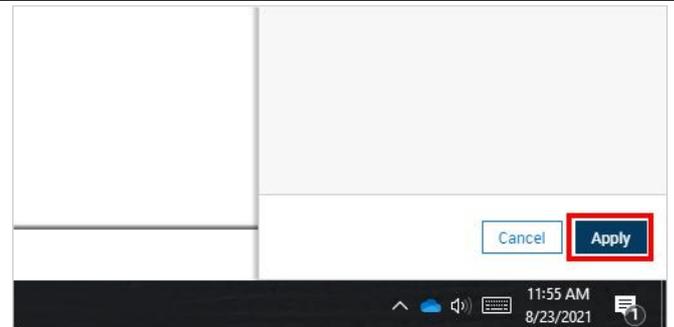


1. Click on the input field **Select a Comment**
2. Click on the correct infraction.

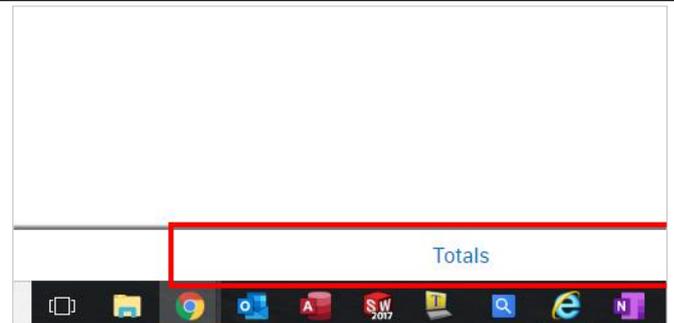
Add a note.



Click on the button **Apply**



If you want to check the totals for the week to ensure time was calculated properly with the new codes applied, you can check the totals for the week by click the **Totals** tab at the bottom of the screen.

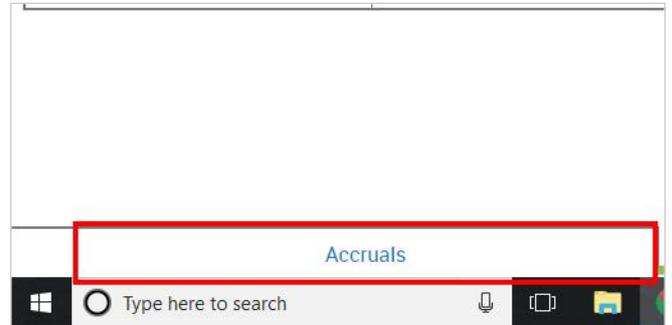


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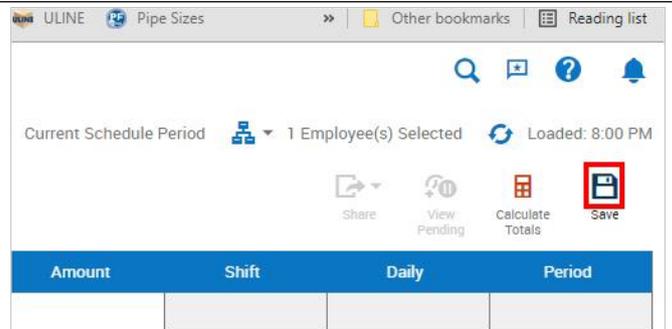
	Pay Code	Amount
4	ISS-REG	40:00
		40:00

- This will show you how many hours they were paid at the specific paycode, such as regular.

You can also see their Accruals/Balance of Vacation by clicking on the **Accruals** tab on the bottom of the screen.

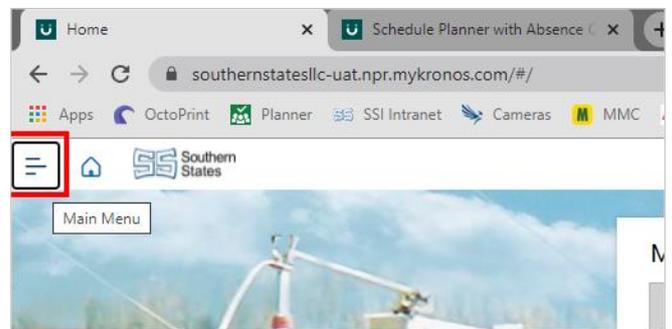


Click on the button **Save**

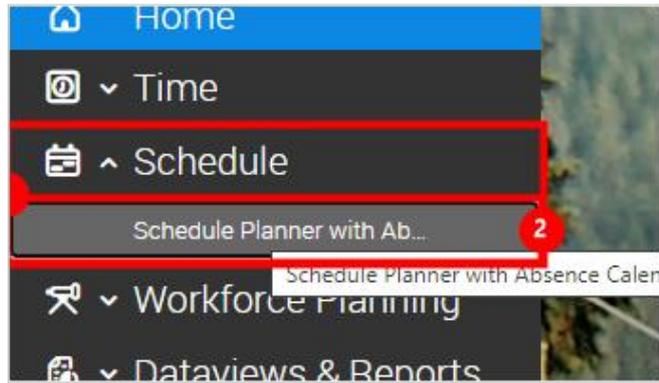


6. Manually Adding Time Off

Click on the button **Main Menu**



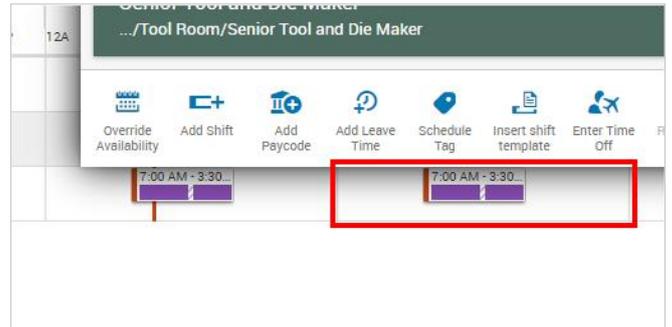
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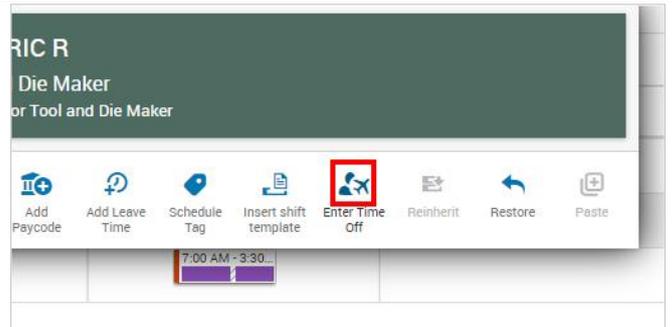
1. Click on the item **Schedule Schedule Planner with Absence Calendar**
2. Click on the link **Schedule Planner with Absence Calendar**

There are two methods for inputting time off. This method works best because it allows you to see time off from the schedule view.

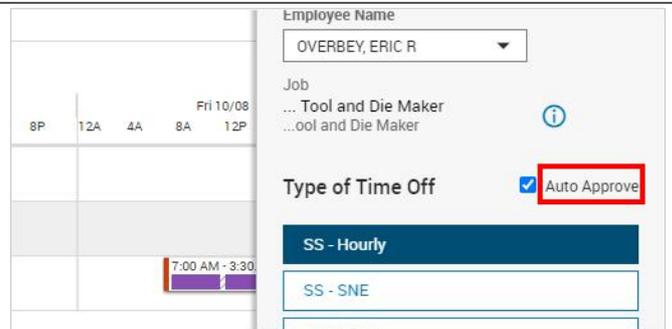
Navigate to the employee and timeframe that you want to enter time off for. Right click the day they want time off.



Click on the button **Enter Time Off**

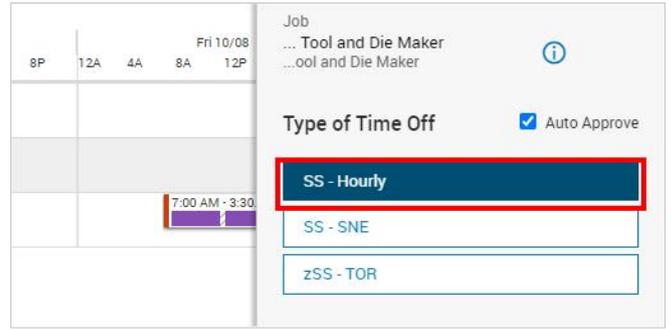


Notice that this will autoapprove the request that you are entering since you are a manager.



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Select the correct employee type for this employee. If they are hourly, select hourly. If they are SNE, select SNE.

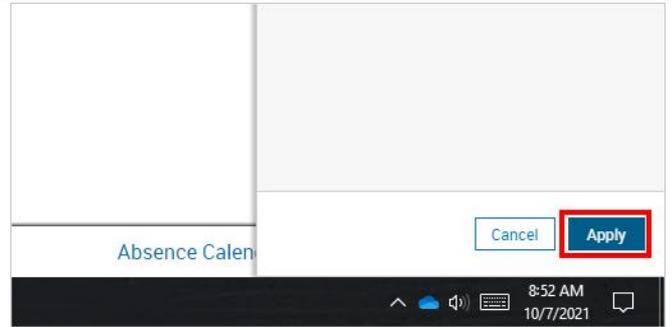


Job
... Tool and Die Maker
...ool and Die Maker

Type of Time Off Auto Approve

- SS - Hourly**
- SS - SNE
- zSS - TOR

Click on the button **Apply**

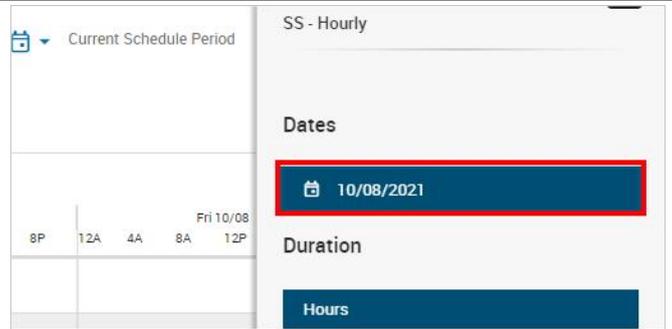


Cancel **Apply**

Absence Calendar

8:52 AM
10/7/2021

Select the Date button if this needs to be added on another date, or span multiple dates.



Current Schedule Period

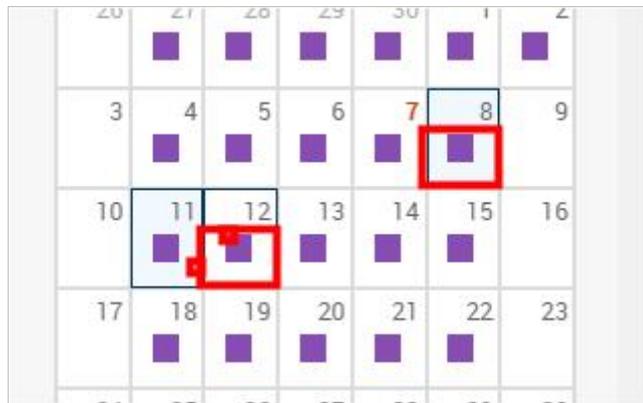
SS - Hourly

Dates

- 10/08/2021**

Duration

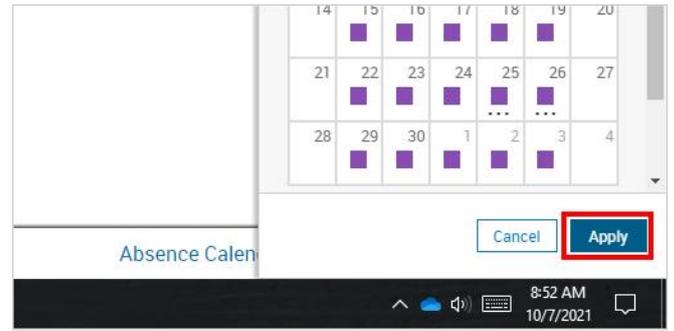
Hours



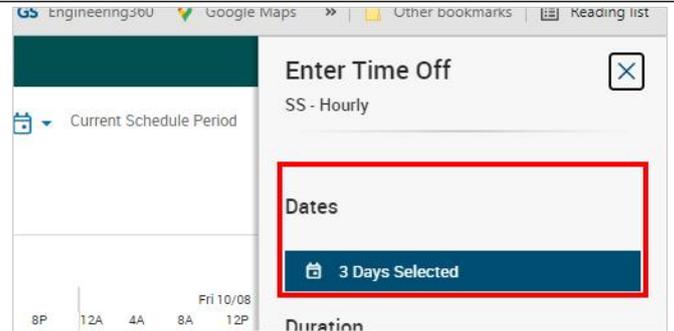
- Manually select each and every day the employee wants to take off with this specific accrual code.

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Click on the button **Apply**



You can confirm the number of dates selected here.



Hours

Start hours *

7:00 AM

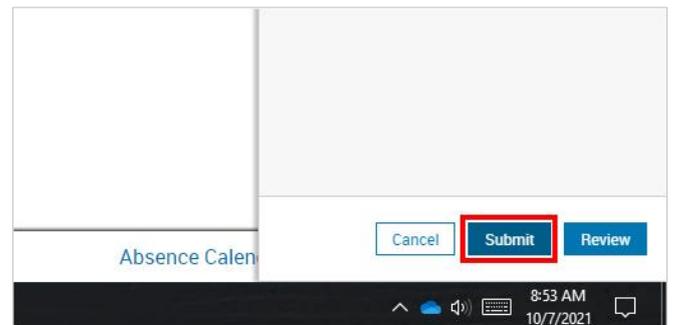
Duration hh:mm *

8

Deduct from

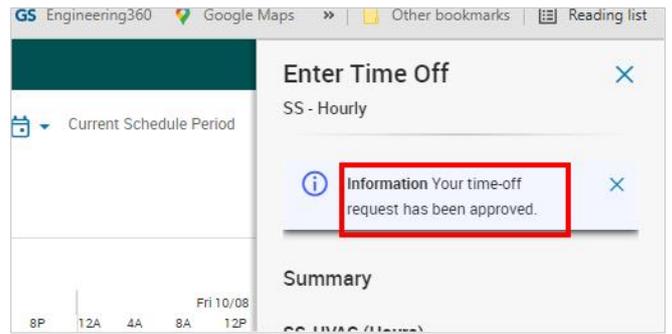
- Insert the scheduled start time for the time off. - Enter the text **7**. Press the **TAB** key.
- Enter the amount of time to be taken each day. - Enter the text **8**.

As long as everything looks correct, press submit.

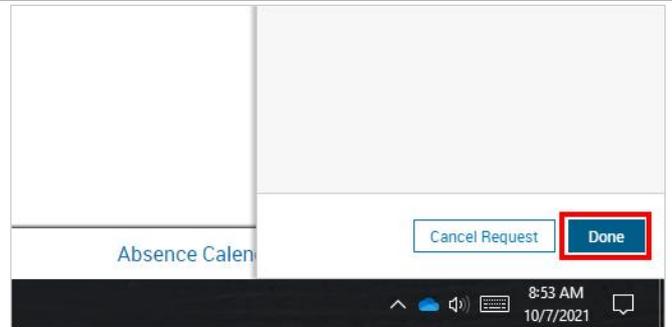


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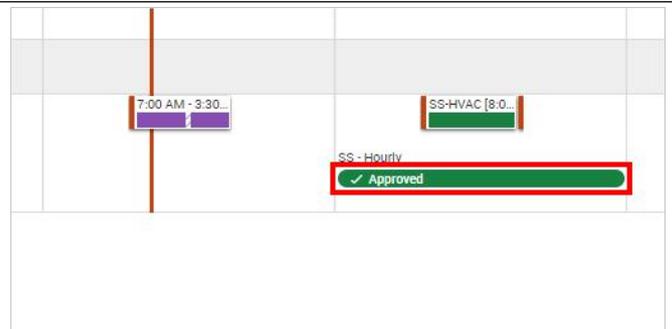
You will get a confirmation message that the time-off request has been approved as long as they have the sufficient balance.



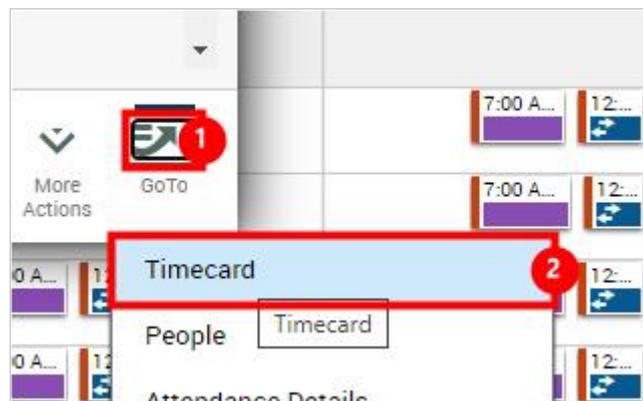
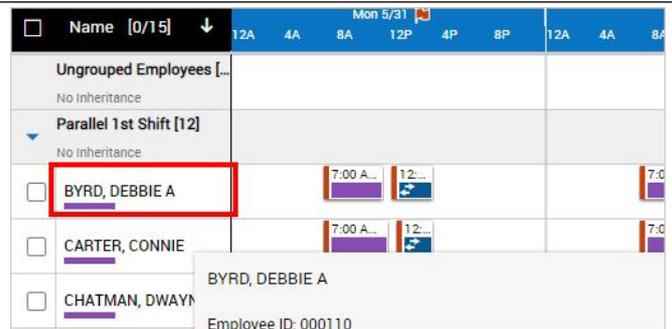
Click on the button **Done**



You will now see the time off in the schedule.



If you want to retroactively add time off for earlier in the week, it may be easier to follow this method instead. Naviaget to the employee you want to edit and right click on them.



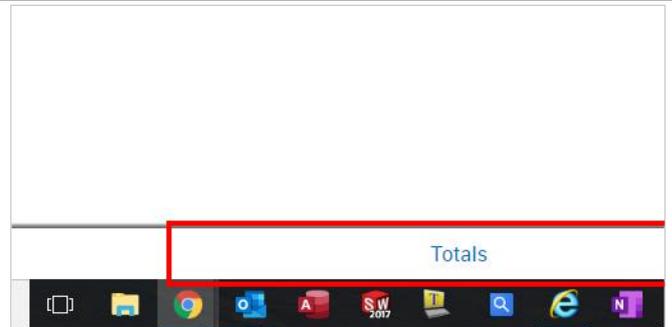
1. Click on the button **GoTo**

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Click on the Amount tab on the next column and enter the appropriate amount for the time off.

Transfer	Pay Code	Amount	Shift
	SS-HVAC		

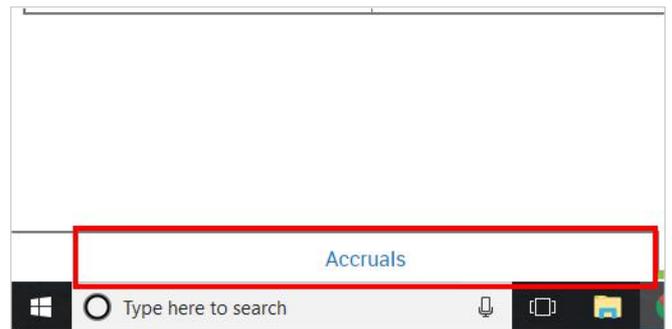
If you want to check the totals for the week to ensure time was calculated properly with the accruals applied, you can check the totals for the week by click the **Totals** tab at the bottom of the screen.



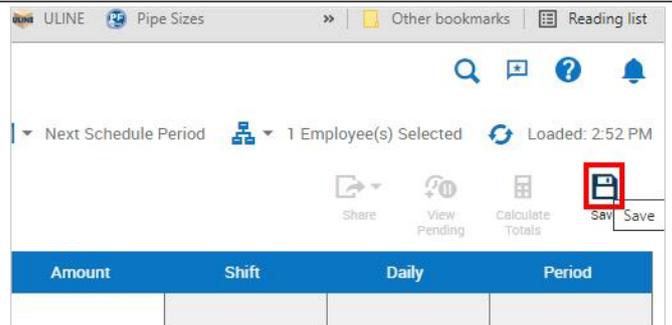
Pay Code	Amount
!SS-REG	32.00
SS-HVAC	8.00

- This will show you how many hours they were paid at the specific paycode, such as regular and holiday.

You can also see their Accruals balance by clicking on the **Accruals** tab on the bottom of the screen.



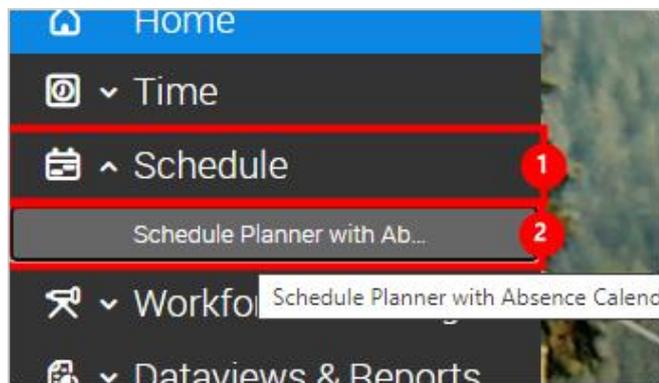
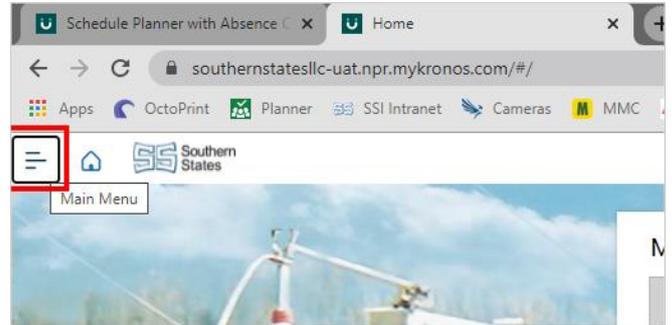
Click on the button **Save**



7. Job Transfer

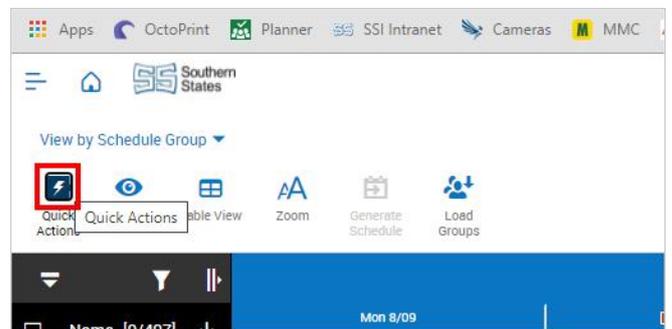
If an employee is being transferred to another department, please follow these instructions on how to transfer them.

Click on the button **Main Menu**

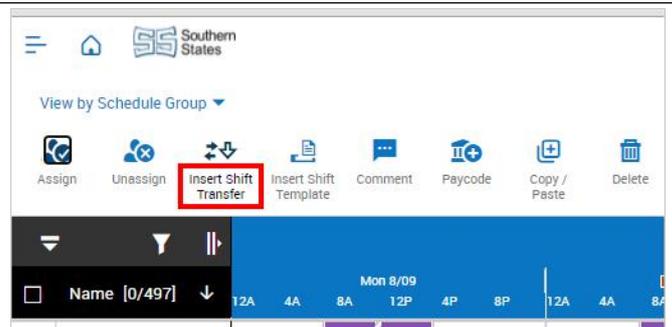


1. Click on the Schedule tab.
2. Click on the link **Schedule Planner with Absence Calendar**

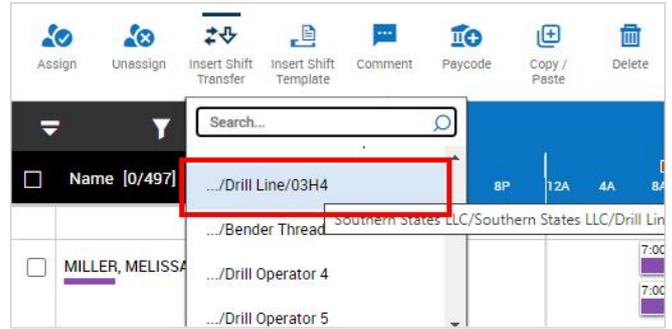
Click on the button **Quick Actions**



Click on the **Insert Shift Transfer** button.

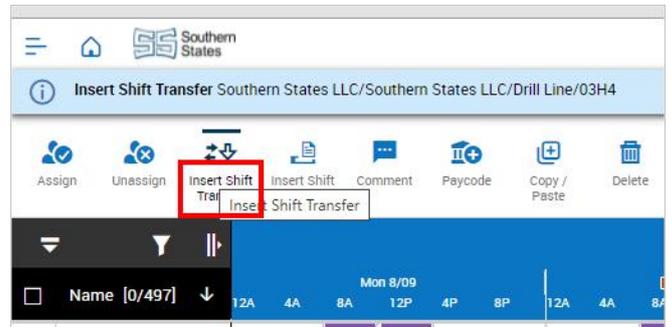


Select the job that you want to transfer this operator to. You can use the search bar to find the specific job you're looking for.

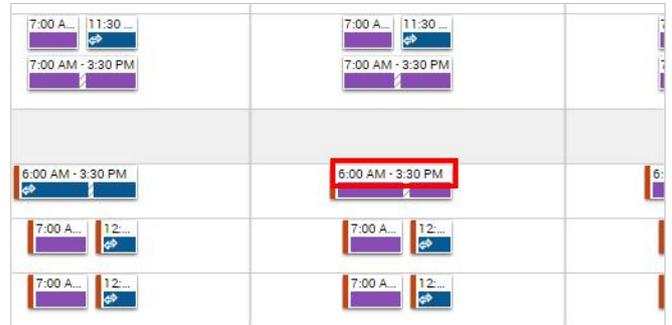


- Select the shifts you want to transfer this employee for. If the transfer is a success, their schedule will turn blue instead of purple.

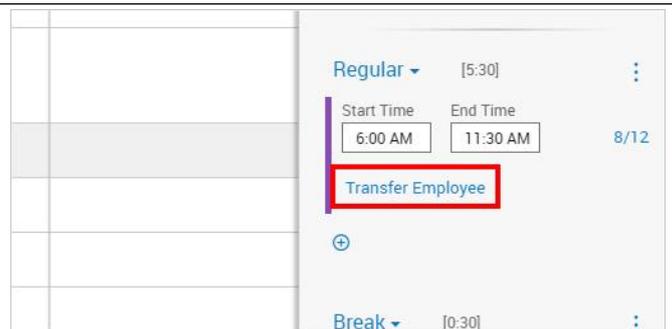
Select the **Insert Shift Transfer** button to toggle off this feature.



If you only want to transfer an employee for half or part of their shift, double click the day you want to edit.

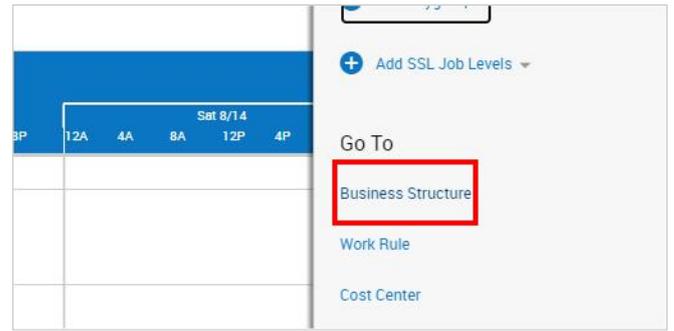


On the half of the schedule that you want to transfer the employee, click the **Transfer Employee** button.



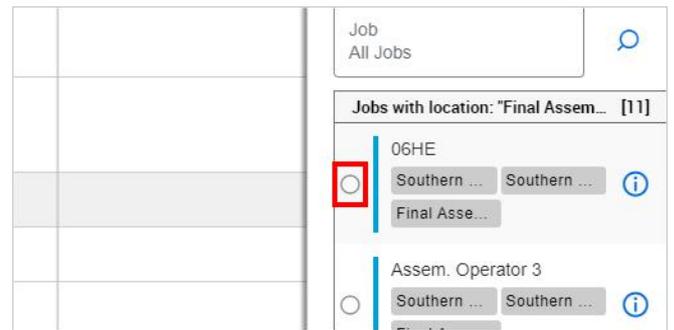
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Click on the button **Business Structure**

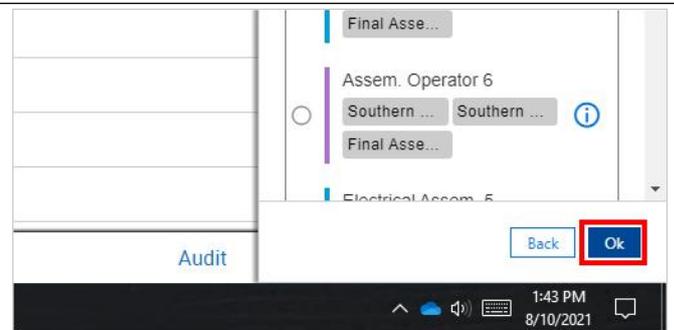


- Use the 'Location' and 'Job' boxes to search for the desired job.

Select the desired job.

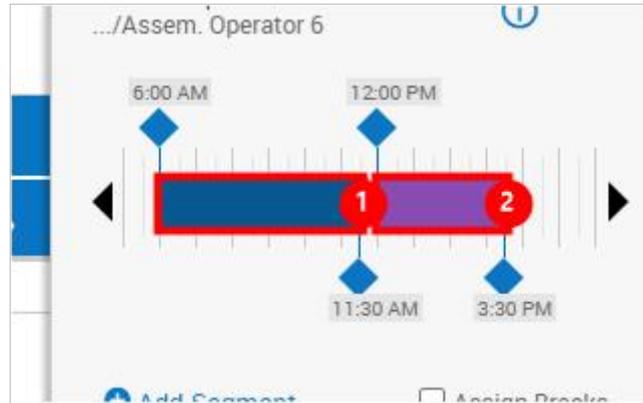
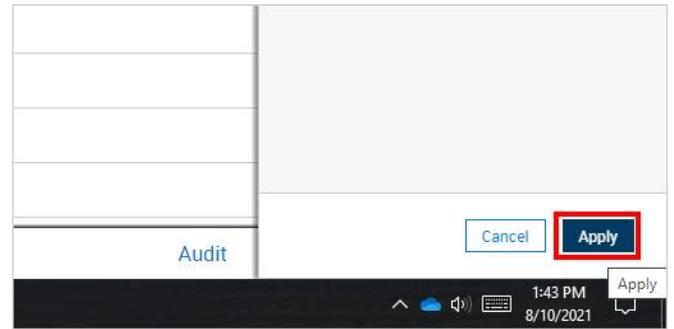


Click on the button **Ok**



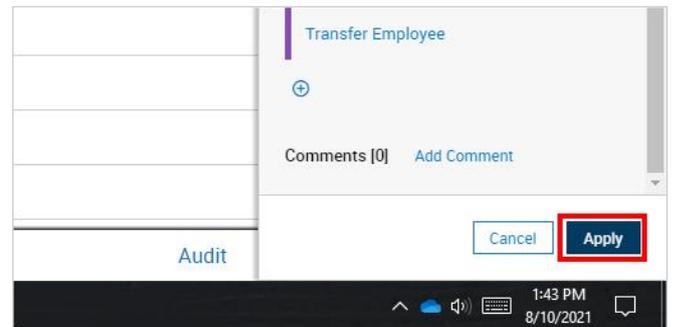
Southern States, LLC	CMilby
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Click on the button **Apply**

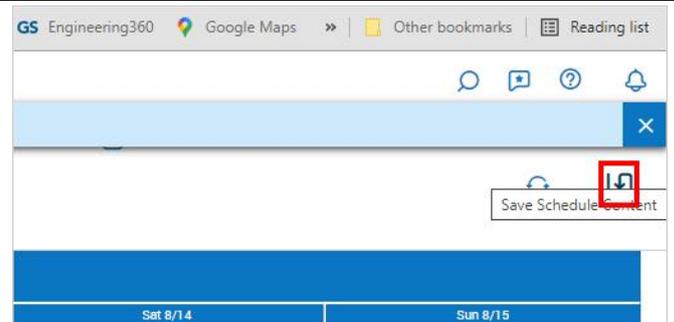


1. The blue portion of the shift shows that the first portion of the shift has a transfer.
2. The purple portion of their schedule represents a regular schedule with no transfer.

Click the **Apply** button. If you need to copy this schedule to other days or employees, you can use the copy/paste functions mentioned earlier.



Click on the button **Save Schedule Content**



If this transfer needs to occur more than a week, it may be better to use the Schedule Pattern feature to transfer one or more employees for the desired time period.

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Name [5/331]	12A	4A	8A	12P
<input type="checkbox"/> ALFRED, NATHAN				7:00 AM - 3:30 P
<input checked="" type="checkbox"/> ALLEN, ANTAVIOUS				7:00 AM - 3:30 P
<input checked="" type="checkbox"/> Allen, Kenneth				7:00 AM - 3:30 P

1. Check the box to the left of the employees that you want to transfer.
2. Right click on one of the selected employees.

Click on **Schedule Pattern**

5 Selected Employees				
<input checked="" type="checkbox"/>	ALLEN, ANTAVIOUS			7:00 AM - 3:30 PM
<input checked="" type="checkbox"/>	Allen, Kenneth			7:00 AM - 3:30 PM

Start Date*	8/23/2021	<input checked="" type="checkbox"/>				
Aug 2021						
Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
<input checked="" type="checkbox"/> 23	<input checked="" type="checkbox"/> 24	25	26	27	28	29
30	31	1	2	3	4	5

1. Click on the calendar and select the date that you want this schedule transfer to begin.

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Click on the radio button **Specify Date**. This will end the pattern on this date and return the employee to their standard schedule.

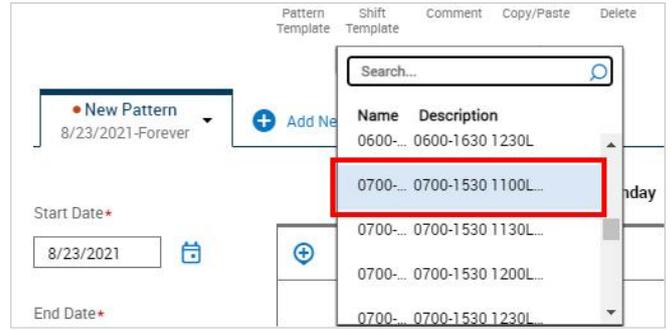
- Click on **Open Calendar** and select the date you want the pattern to end.

Click on the checkbox **Override Other Patterns**

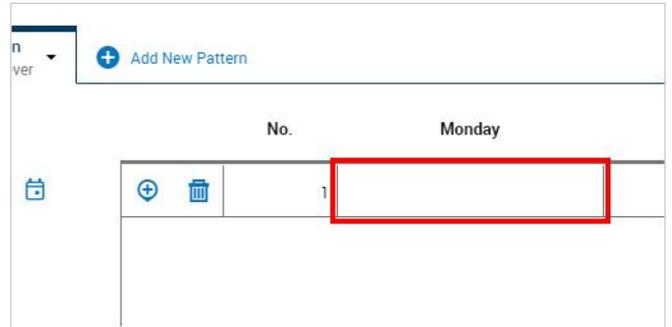
Click on **Shift Template**

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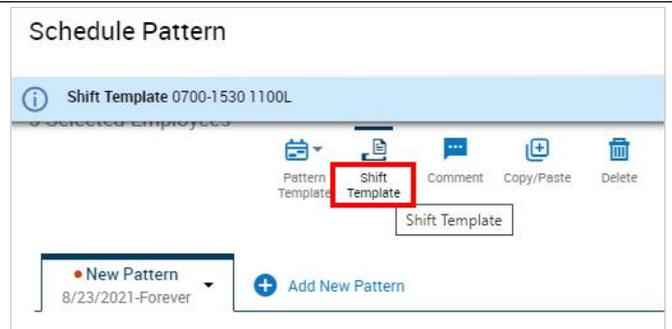
Select the schedule you want the employee to work. This may end up being the same schedule they already have assigned, but without a transfer applied. We'll apply the transfer next.



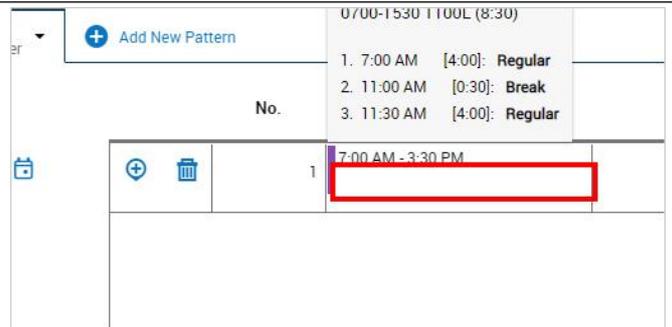
Paste the schedule on one of the days.



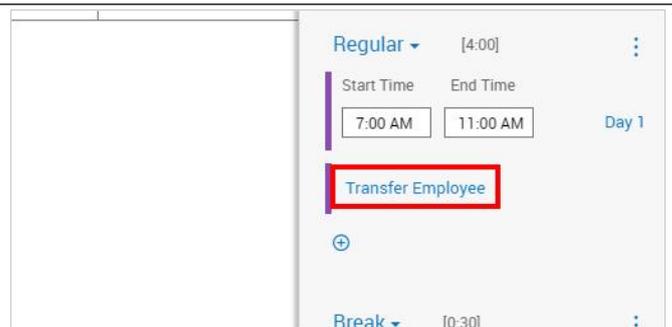
Click on **Shift Template** to toggle the paste feature off.



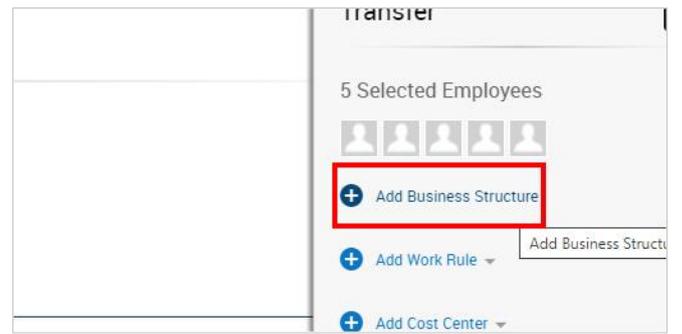
Double click on the schedule we just pasted.



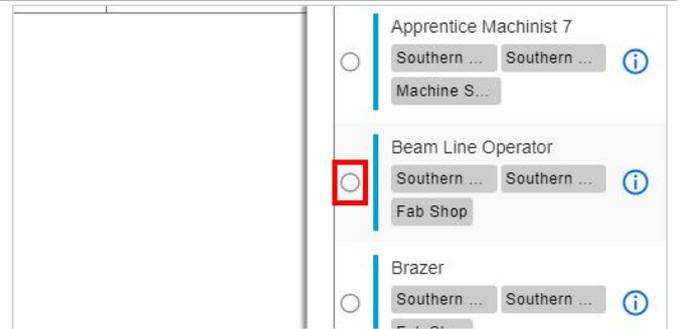
Click on the button **Transfer Employee**



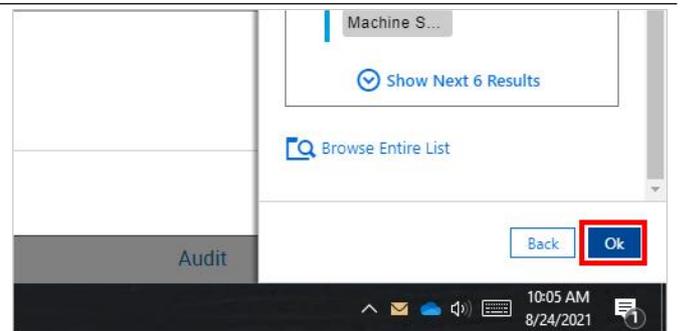
Click on the button **Add Business Structure**



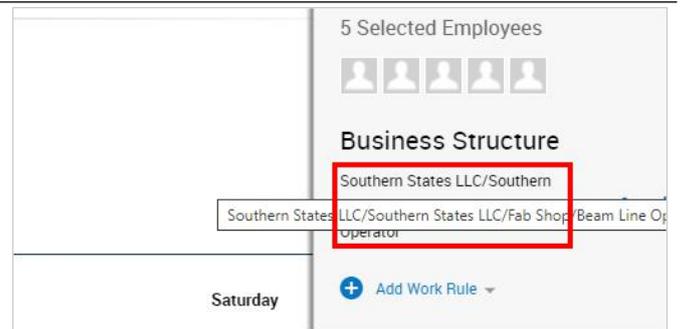
Use the search bars to navigate to either the department or job title that you want to use. Click the radio button for the job you want to select.



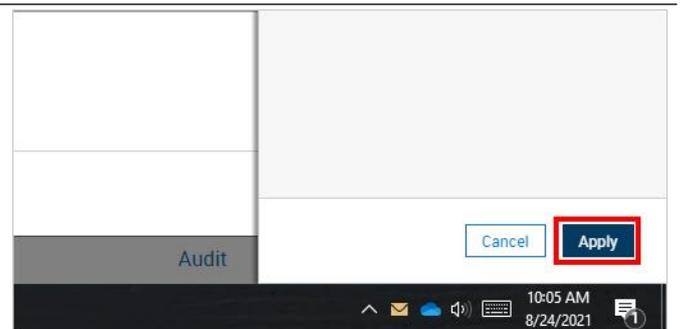
Click on the button **Ok**



You will see the job location that you are transferring to now listed at the top under 'Business Structure.'

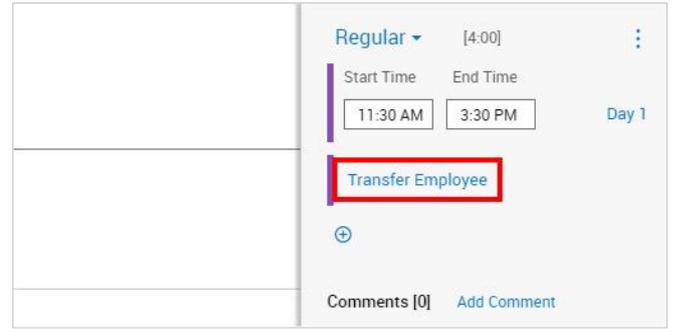


Click on the button **Apply**

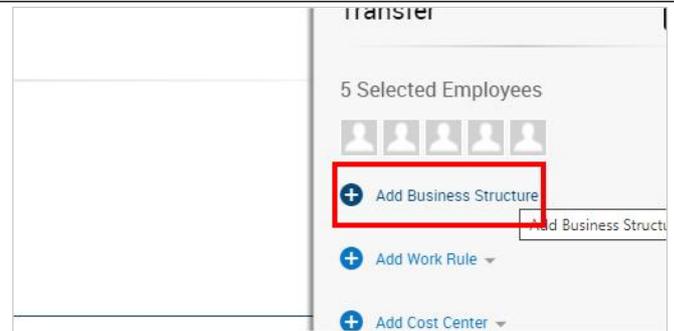


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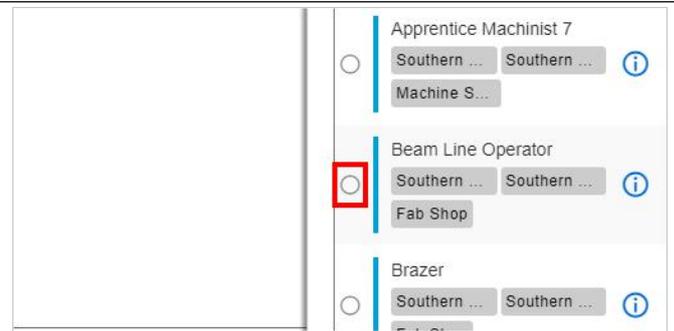
Click the button **Transfer Employee** for the second portion of the day. It is very important that the full schedule is transferred.



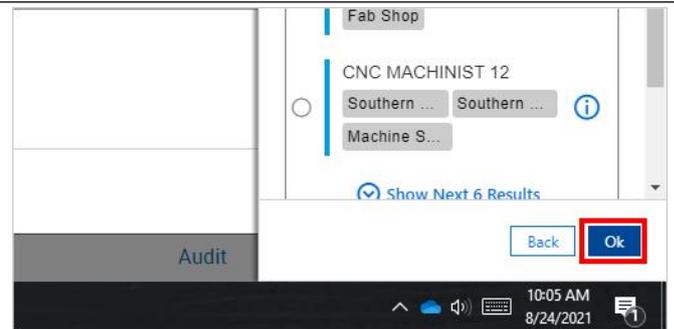
Click on the button **Add Business Structure**



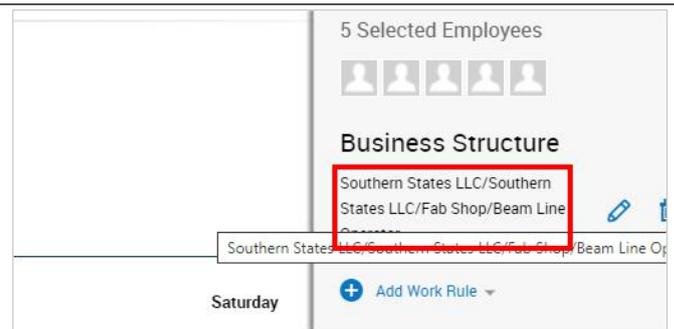
Use the search bars to navigate to either the department or job title that you want to use. Click the radio button for the job you want to select.



Click on the button **Ok**

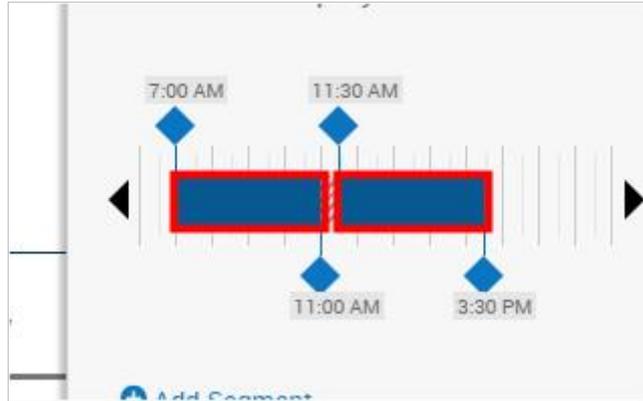
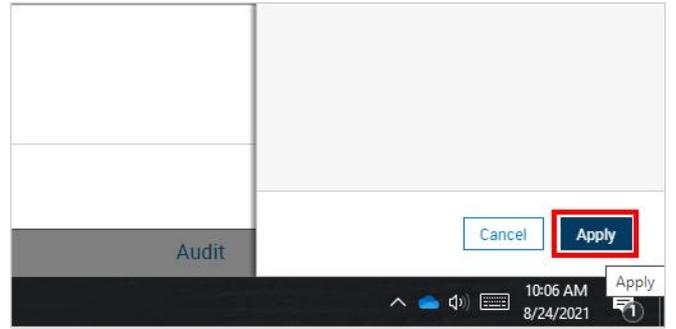


Confirm your selection at the top of the page.



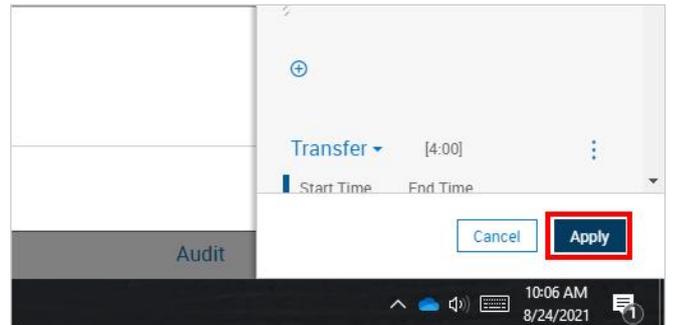
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Click on the button **Apply**

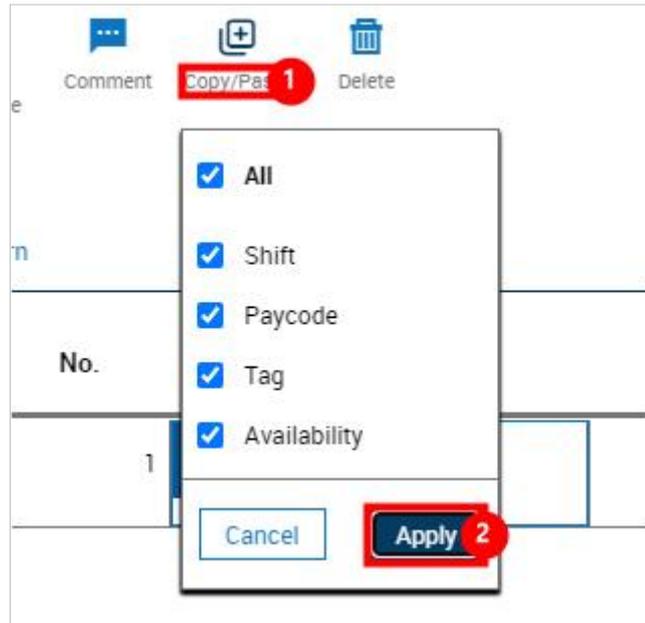


- The full day should now appear as blue on the schedule, indicating that the shift has a transfer applied.

Click on the button **Apply**

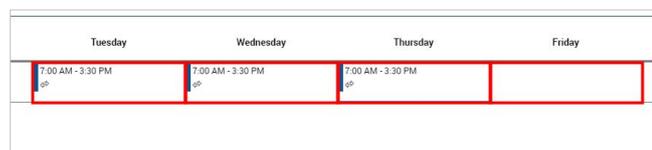
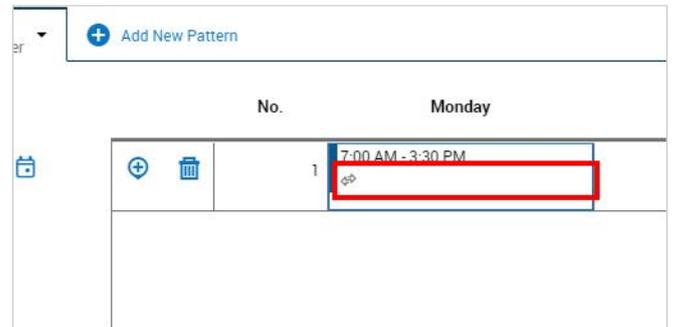


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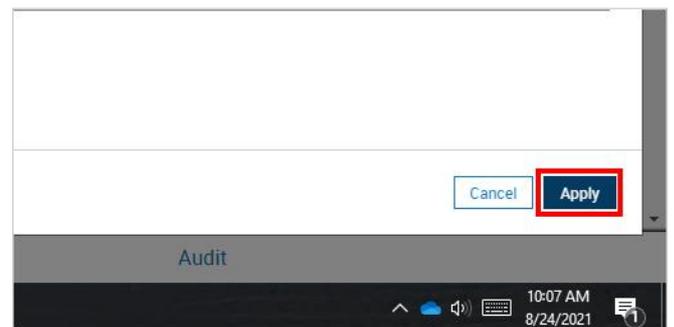
1. Click on **Copy/Paste**
2. Click on the button **Apply**

Click on the schedule you just created. This will copy it so we can paste it on the other days.



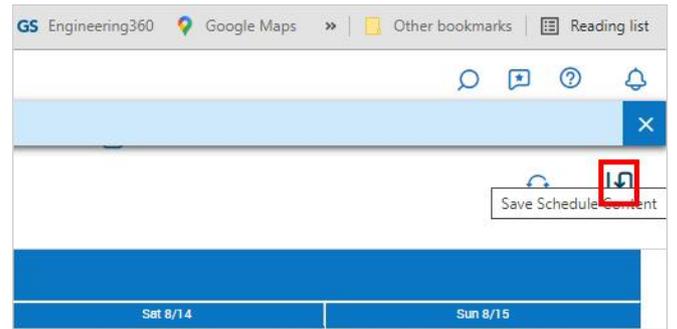
- Select the days you want to place this schedule.

Click on the button **Apply**



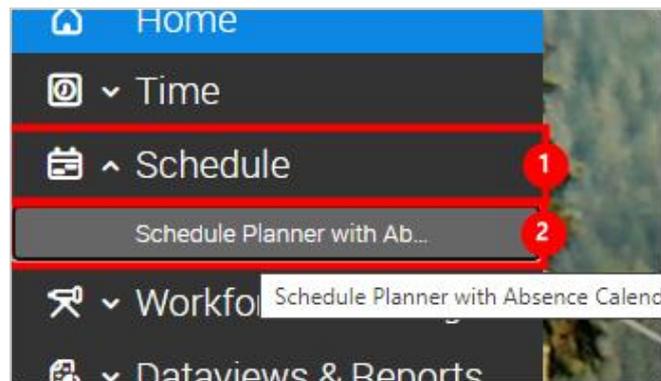
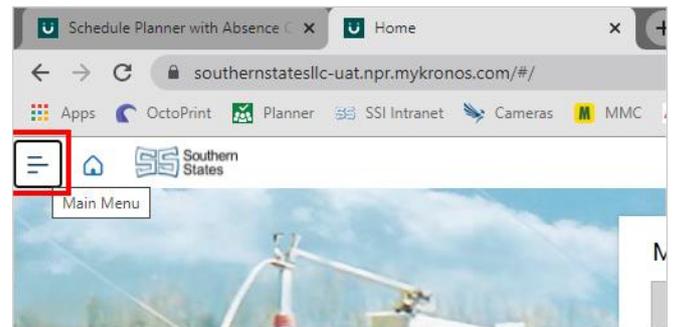
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Click on the button **Save Schedule Content**



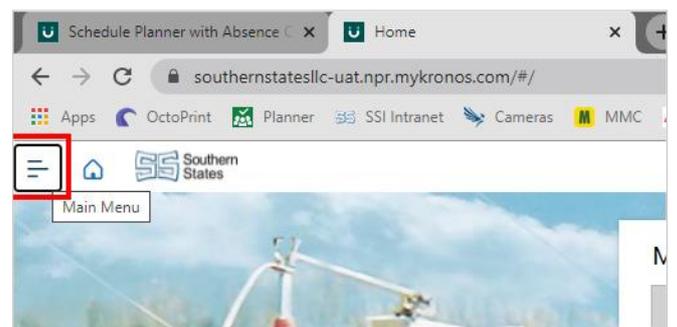
8. Labor Grade Transfer

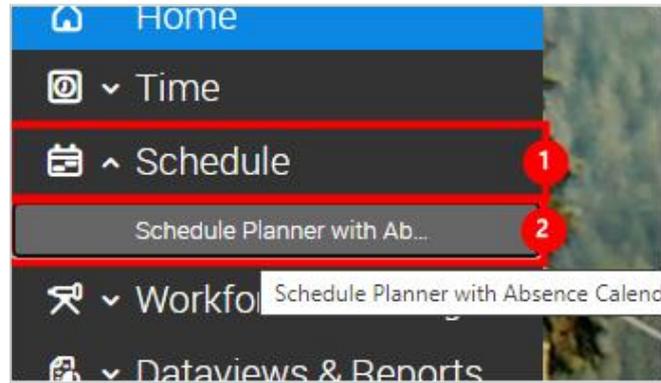
Click on the button **Main Menu**



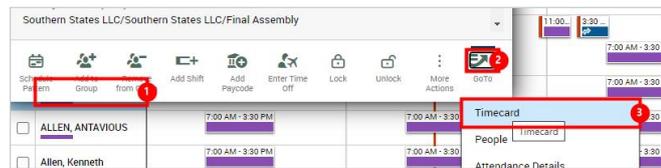
1. Click on the Schedule tab.
2. Click on the link **Schedule Planner with Absence Calendar**

Click on the button **Main Menu**



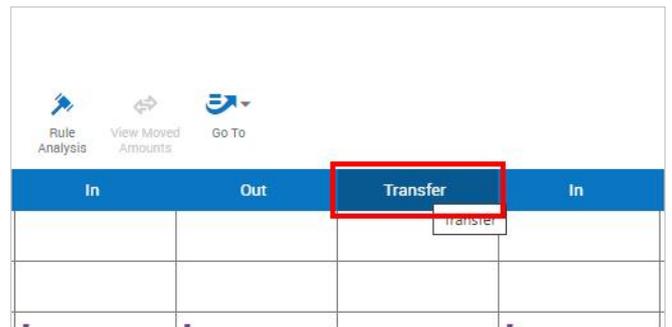


1. Click on the Schedule tab.
2. Click on the link **Schedule Planner with Absence Calendar**



1. Right click on the employee you want to transfer.
2. Click on the button **GoTo**
3. Click on the button **Timecard**

Notice the Transfer columns at the top of the schedule. This will row will show what transfers are applied to that specific time period.



1. Click on the first segment of the day's transfer box.
2. Click on the button **Search...**

Click on the blank box under 'Transfer' on the time period you want to give the labor rate change.

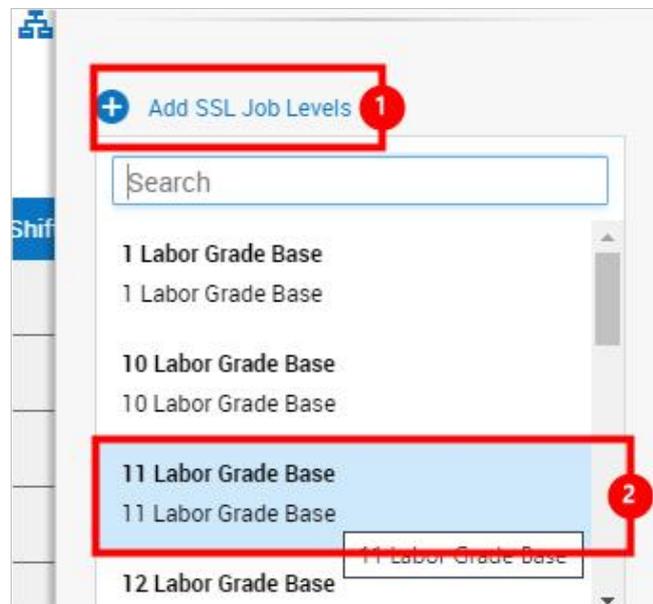
absence	In	Out	Transfer
	7:00 AM	11:00 AM	
	11:30 AM	3:30 PM	...n-8h Shift 1 Part 2;;
	7:00 AM	11:00 AM	

One the new drop down, select **Search...**

7:00 AM	11:00 AM	Choose:	
11:30 AM	3:30 PM	;;;13 Labor Grade Base,;	
7:00 AM	11:00 AM	Southern States LLC/Southern States LLC/M	
11:30 AM	3:30 PM	;!SSL- Union-8h Shift 2 part 2;;	
7:00 AM	11:00 AM	;!SSL- Union-8h Shift 2;;	
11:30 AM	3:30 PM	;!SSL- Union-8h Shift 1;;	
7:00 AM	11:00 AM	Search...	

Click on the button **Add Labor Category**

Labor Categories ...	
8:00	+
	+ Add Business Structure
	+ Add Work Rule
	+ Add Cost Center
	+ Add Labor Category



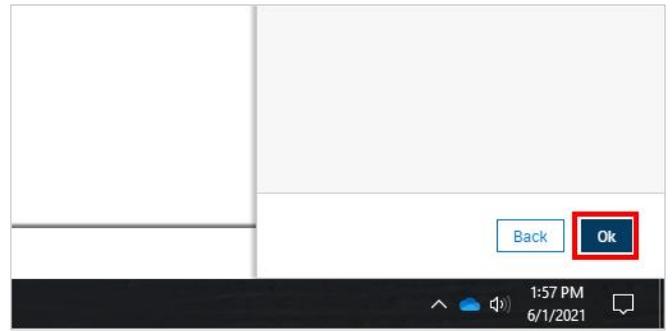
1. Click on the button **Add SSL Job Levels**

2. Select the labor grade you want to assign.

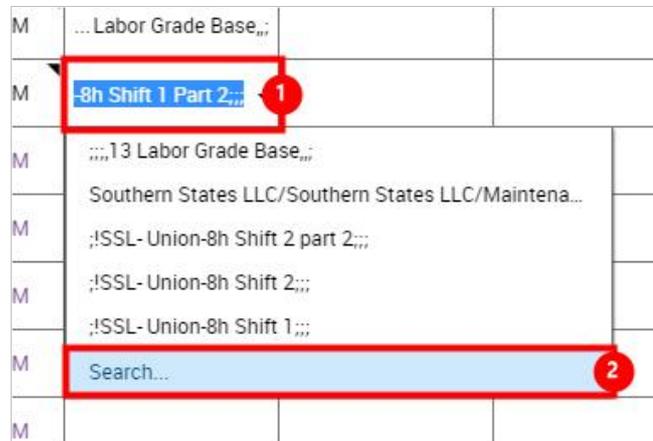
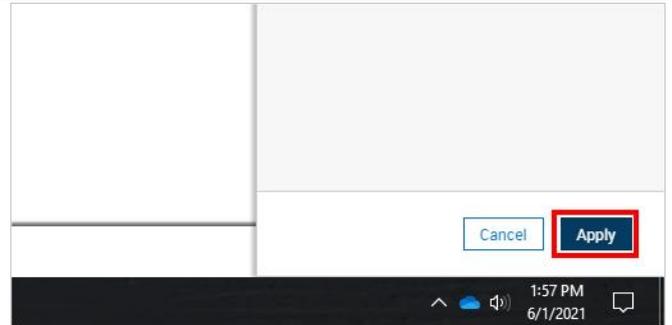
1. Click on the button **Add SSL Job Levels**
2. Select the labor grade you want to assign.

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Click on the button **Ok**

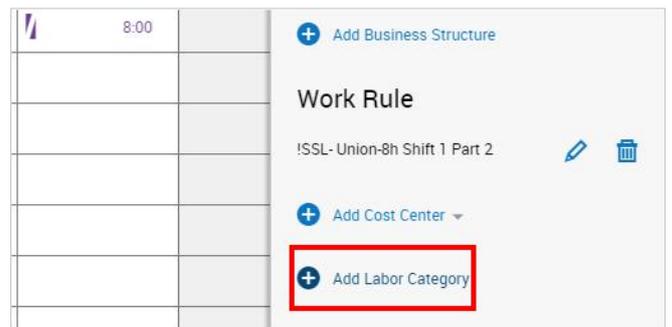


Click on the button **Apply**

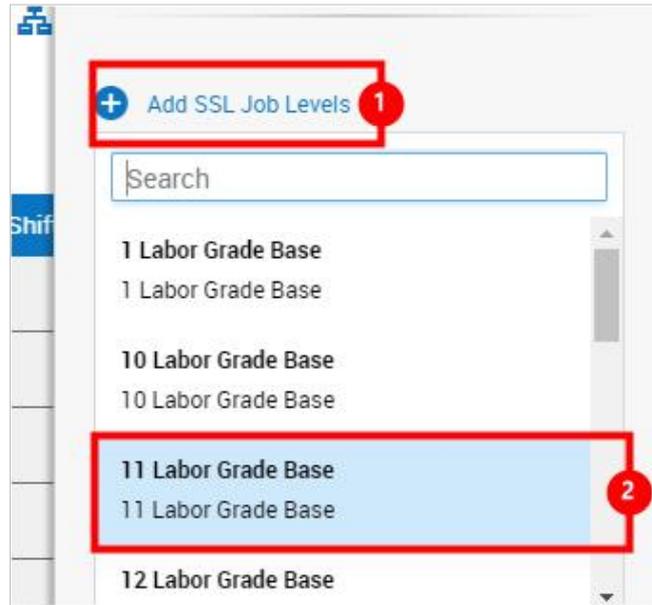


1. Select the labor grade for the second half of the shift as well.
2. On the new drop down, select **Search...**

Click on the button **Add Labor Category**

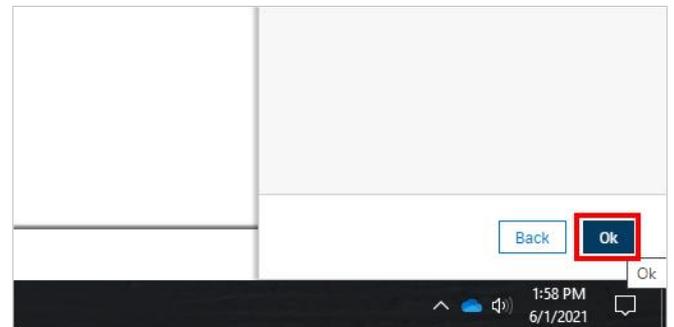


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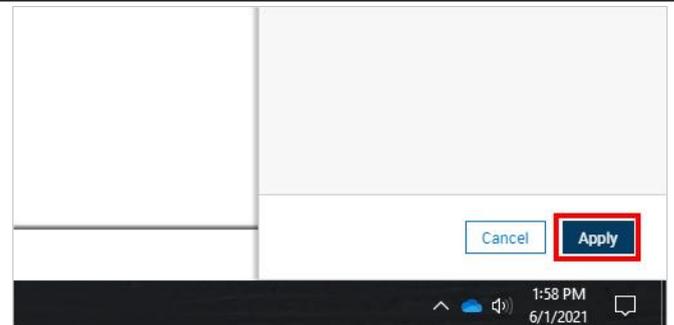


1. Click on the button **Add SSL Job Levels**
2. Assign that labor grade that you want assigned.

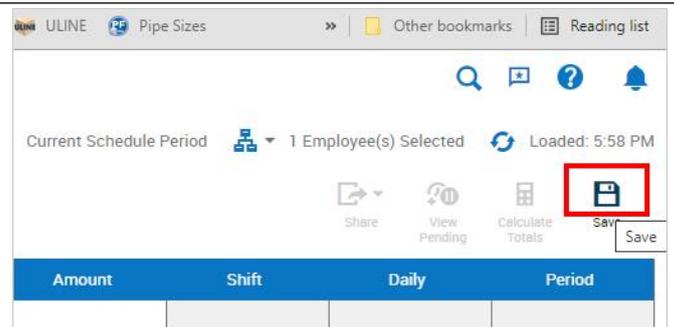
Click on the button **Ok**



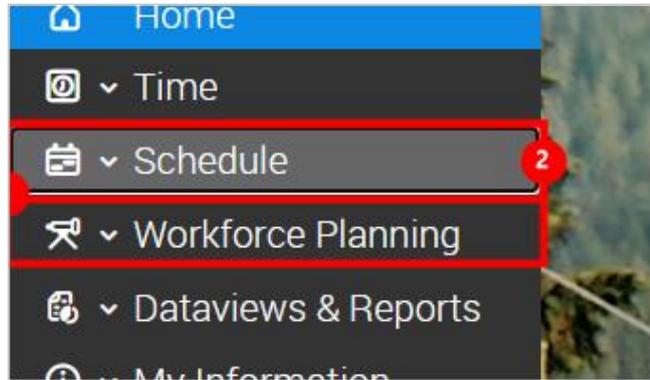
Click on the button **Apply**



Click Save in the top right on the screen.

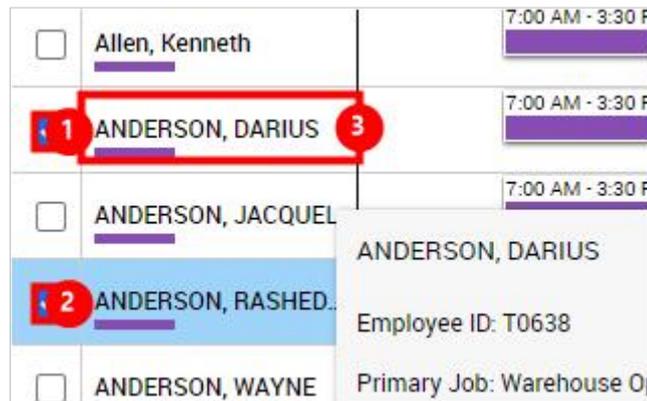
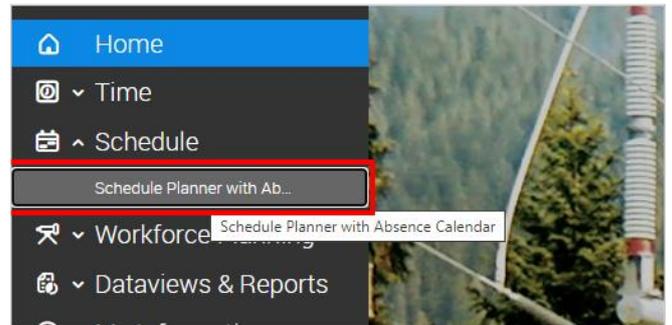


If you want to apply this over the course of an extended period of time, or to multiple employees, you navigate back to the full schedule. Select the **Main Menu** button.



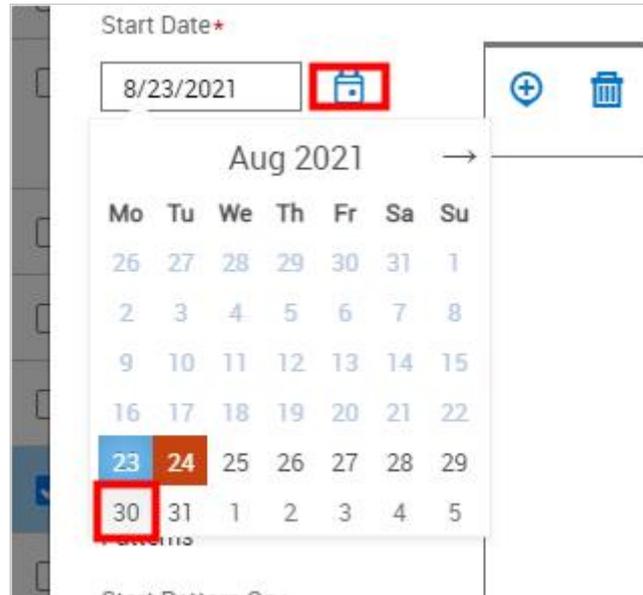
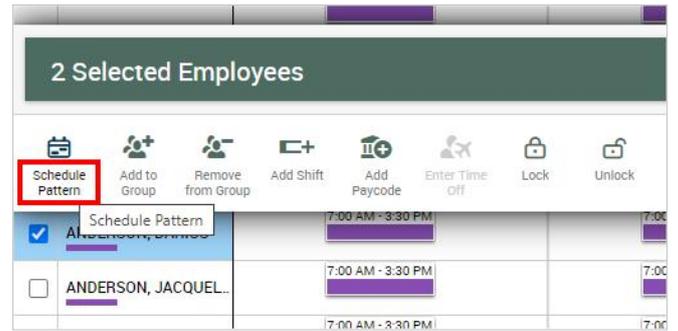
1. Select the Schedule tab.
2. Click on the item **Schedule Schedule Planner with Absence Calendar**

Click on the link **Schedule Planner with Absence Calendar**



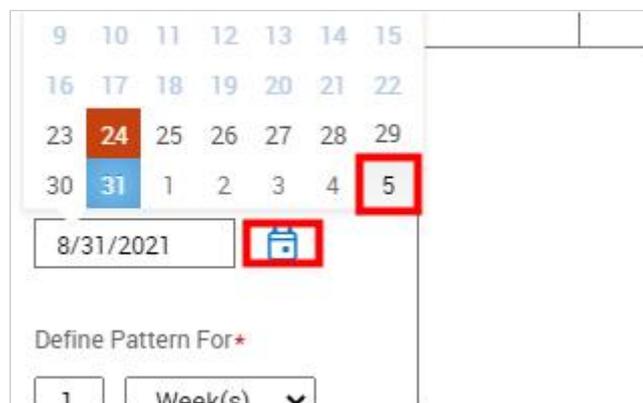
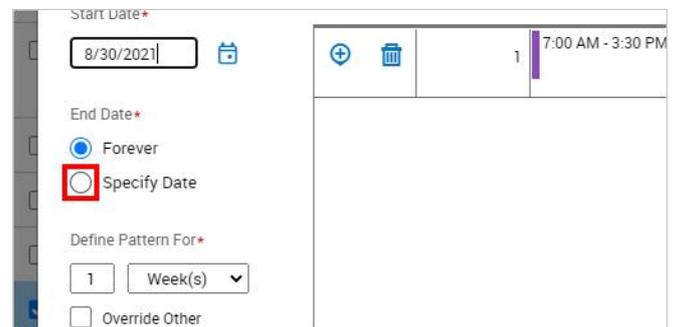
1. Click the checkbox next to the employees that you want to work with.
2. Right click one of the selected employees.

Click on **Schedule Pattern**



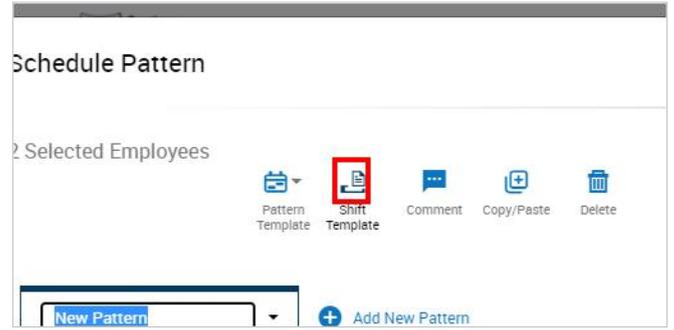
- Click on **Open Calendar** to select the day that you want this pattern to start.

Click on the **Specify Date**. This will give a date for the pattern to end. After this date, their schedule will return to their standard schedule.

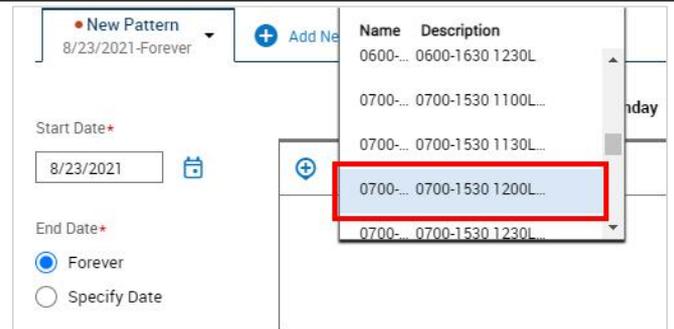


- Click on **Open Calendar** and select the date you want the pattern to end.

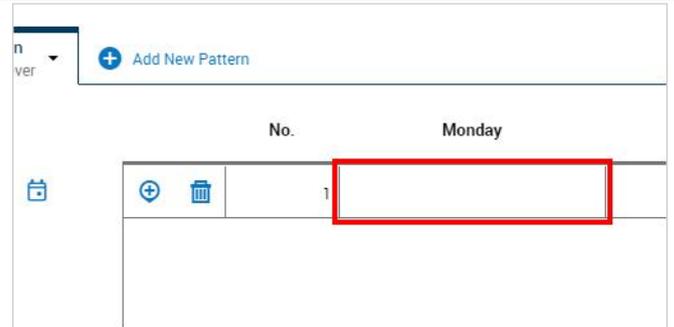
Click on the button **Shift Template**



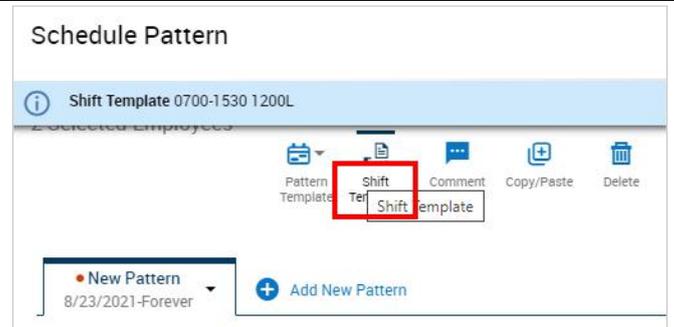
Select the shift you want the employee to work. We will transfer the employee next.



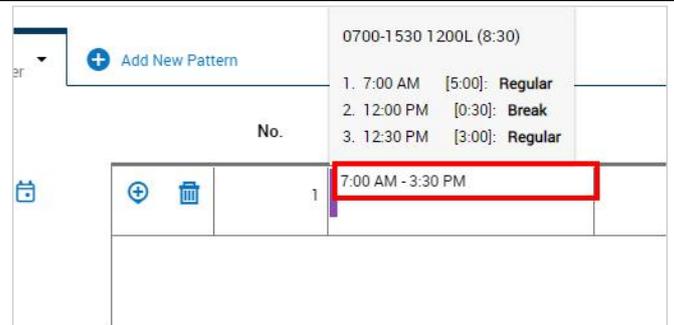
Click on a day to paste the schedule here.



Click on **Shift Template**

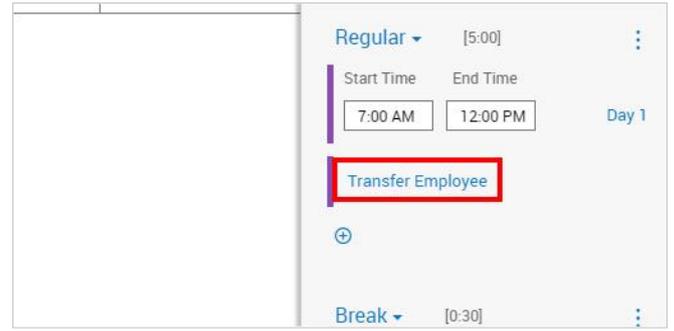


Double click on the schedule you just pasted.

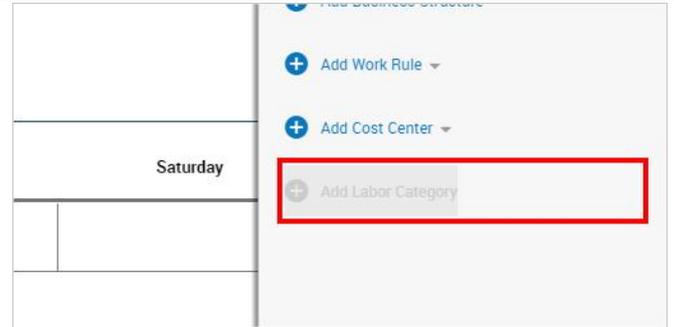


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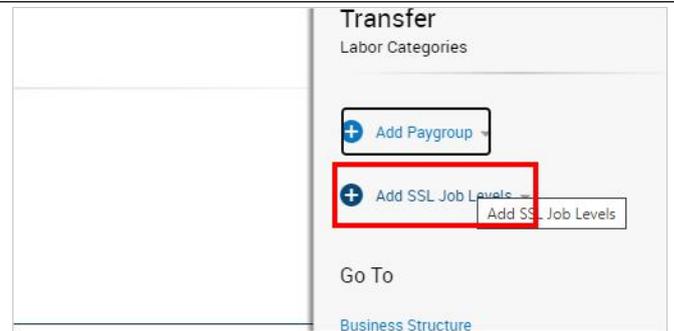
Under the first segment of the day, select **Transfer Employee**.



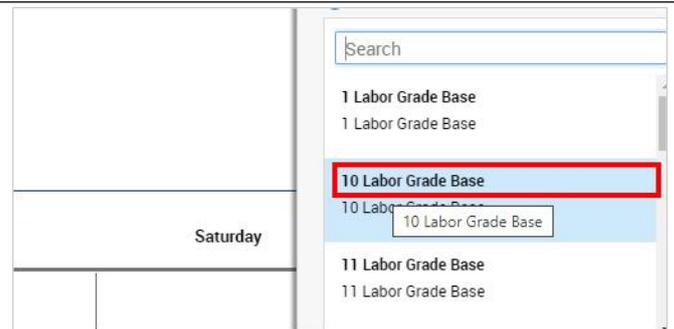
Click on **Add Labor Category**



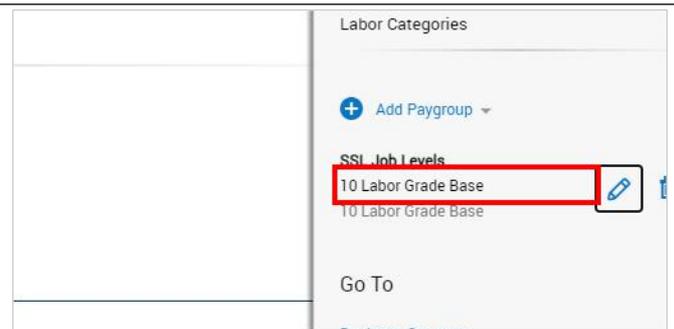
Click on the button **Add SSL Job Levels**



Select the labor grade you want to transfer the employee to.

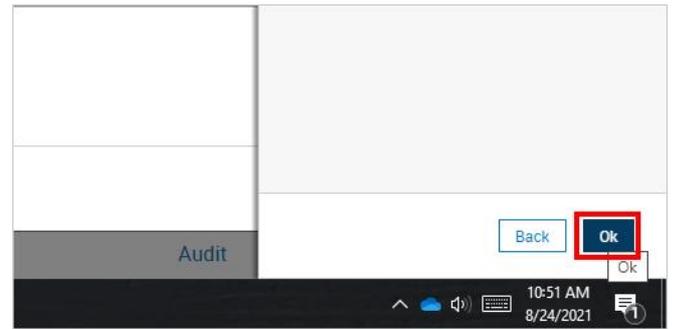


Confirm your selection is correct.

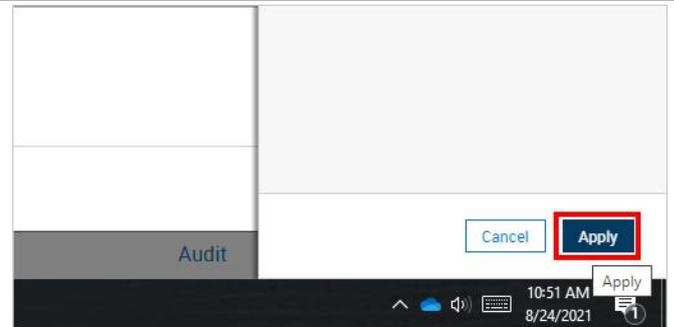


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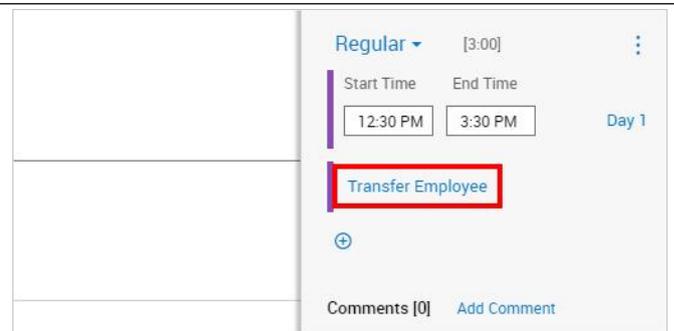
Click on the button **Ok**



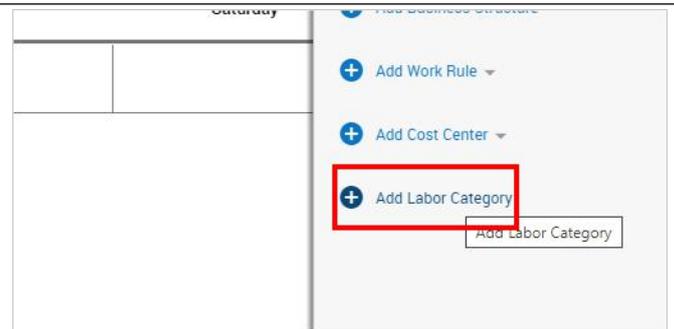
Click on the button **Apply**



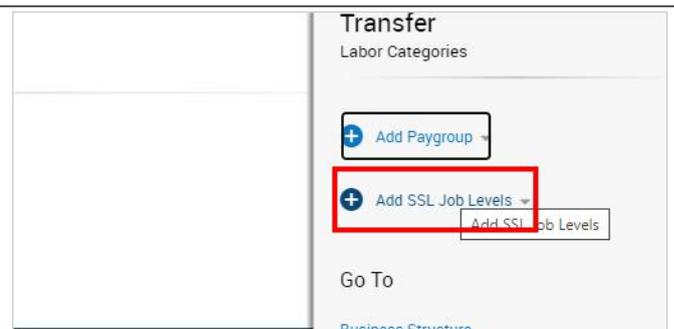
Select the **Transfer Employee** button for the second half of the day.



Click on the button **Add Labor Category**

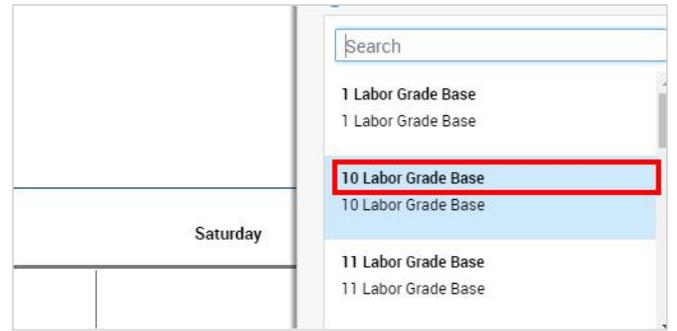


Click on the button **Add SSL Job Levels**

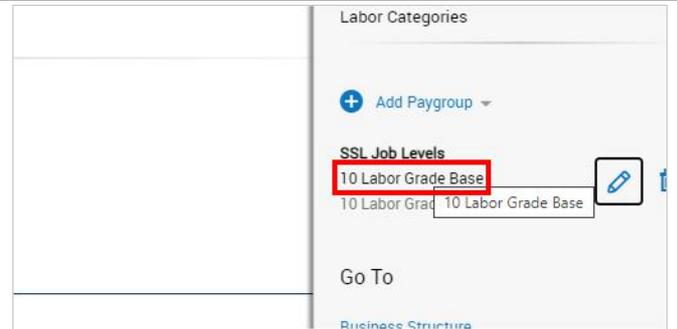


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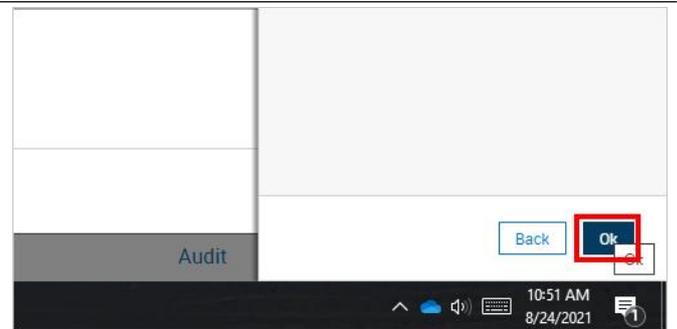
Select the labor grade you want to transfer the employee to.



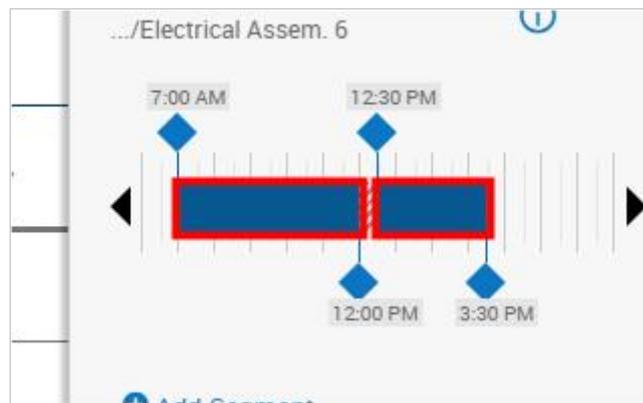
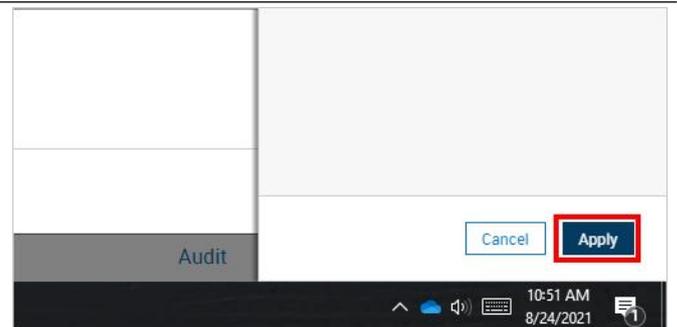
Confirm your selection.



Click on the button **Ok**



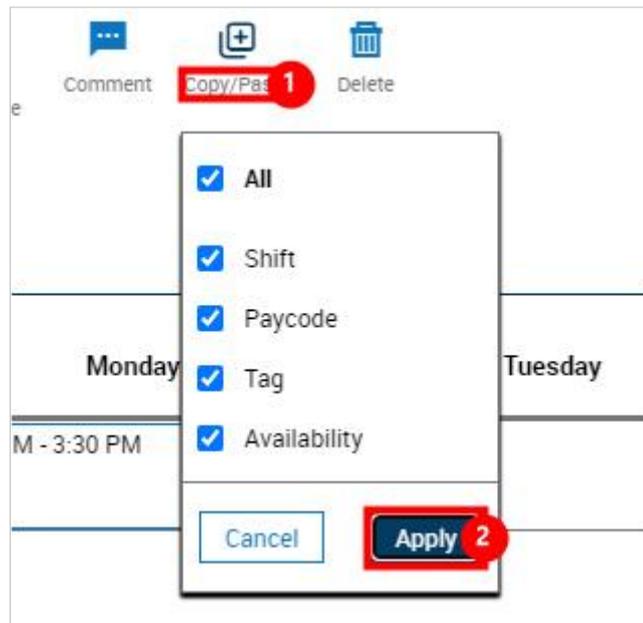
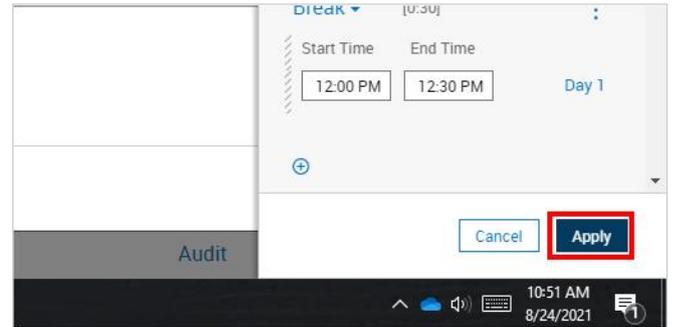
Click on the button **Apply**



- The entire schedule should now appear as blue, showing that the shift has transfers for both segments.

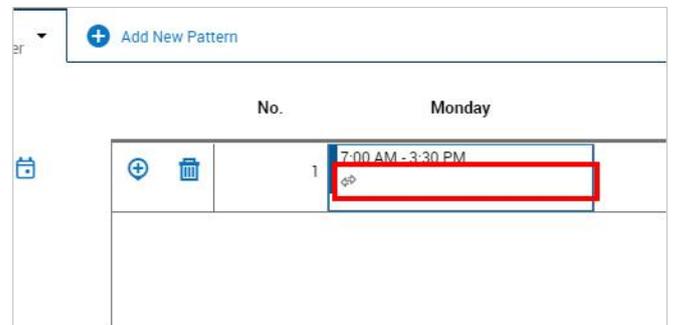
Southern States, LLC	CMilby
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Click on the button **Apply**



1. Click on **Copy/Paste**
2. Click on the button **Apply**

Select the shift you want to copy.

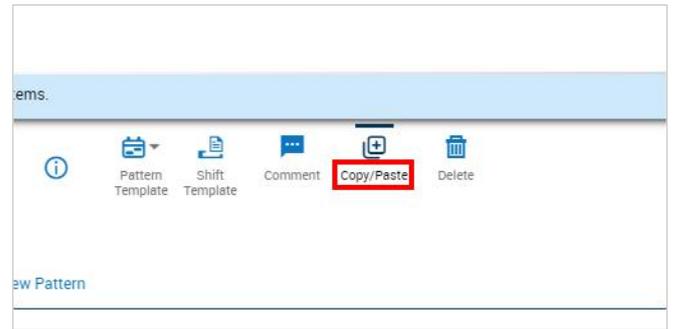


Tuesday	Wednesday	Thursday	Friday
7:00 AM - 3:30 PM	7:00 AM - 3:30 PM	7:00 AM - 3:30 PM	

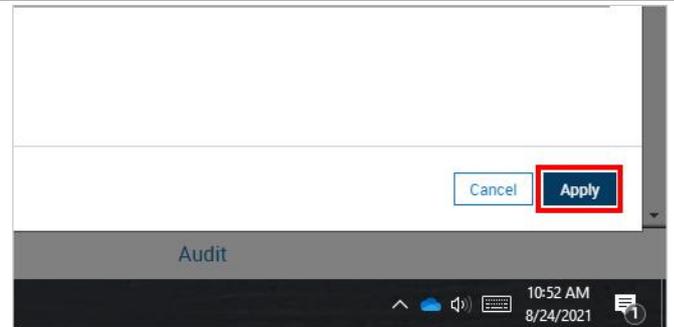
- Select all the date you want to paste the schedule.

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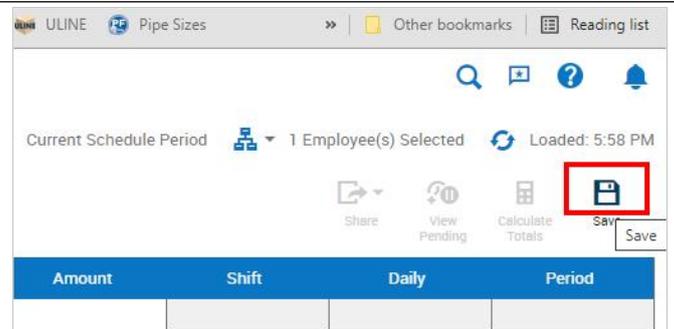
Click on **Copy/Paste** to toggle off the function.



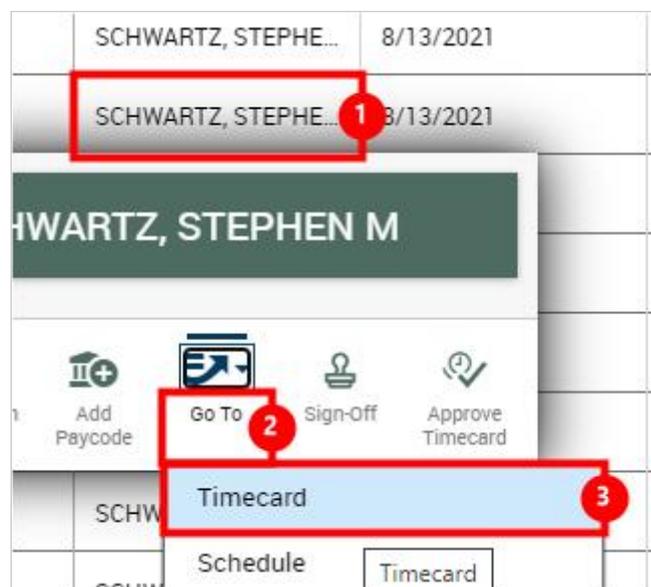
Click on the button **Apply**



Click Save in the top right on the screen.



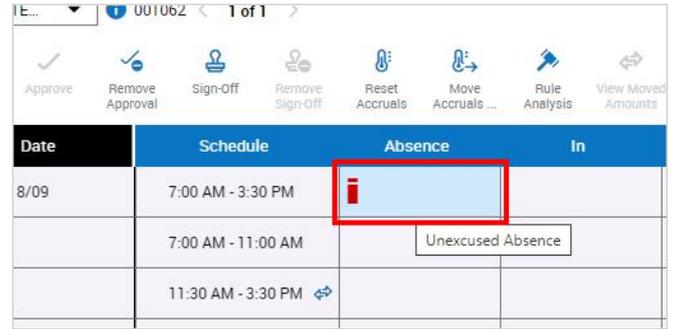
9. Assigning Absence Codes



1. Navigate to the employee's time card. If you notice an issue when reviewing the weekly dataview or browsing the weekly schedule, you can simply right click the user.

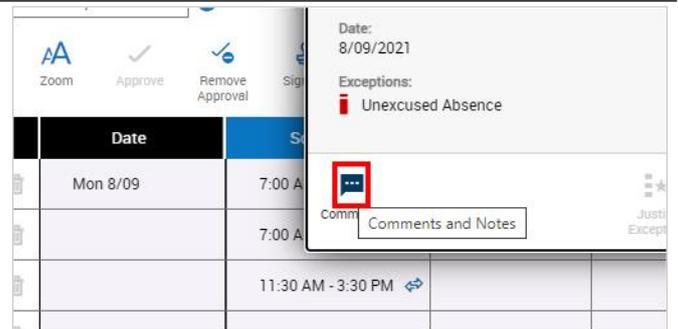
2. Click on **Go To**
3. Click on the button **Timecard**

If you want to apply a code to an absence specifically, right click the corresponding day's red mark in the 'Absence' column.



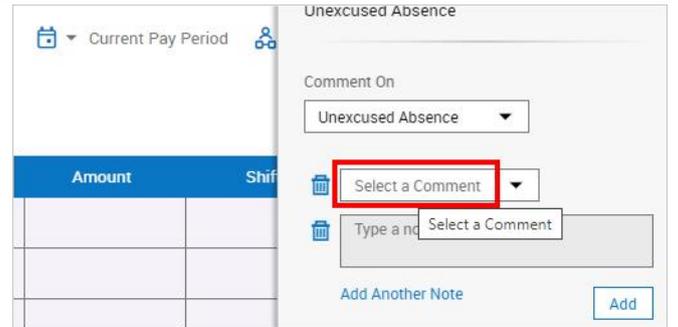
Date	Schedule	Absence	In
8/09	7:00 AM - 3:30 PM		
	7:00 AM - 11:00 AM	Unexcused Absence	
	11:30 AM - 3:30 PM		

Click on the button **Comments and Notes**



Date	Schedule	Absence	In
Mon 8/09	7:00 A		
	7:00 A		
	11:30 AM - 3:30 PM		

Click on the input field **Select a Comment**



Unexcused Absence

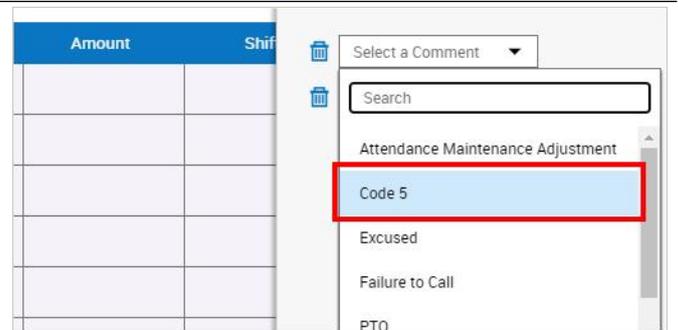
Comment On: Unexcused Absence

Select a Comment

Type a note

Add Another Note Add

Select the 'Code 5', or other applicable code for this day's absence.



Select a Comment

Search

Attendance Maintenance Adjustment

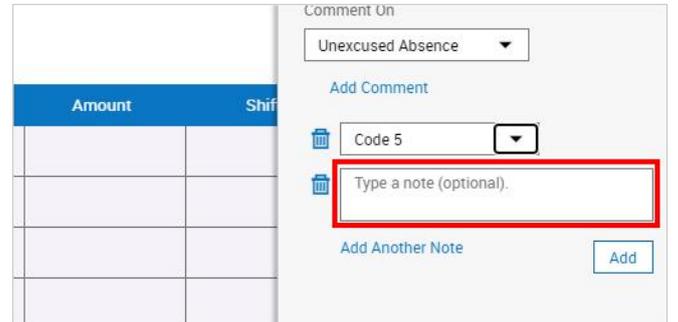
Code 5

Excused

Failure to Call

PTO

Be sure to include a note describing the event.



Comment On: Unexcused Absence

Add Comment

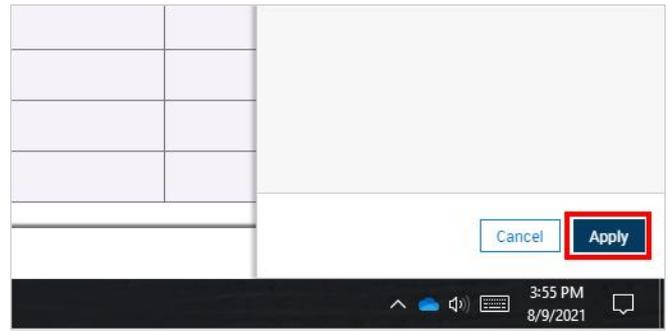
Code 5

Type a note (optional).

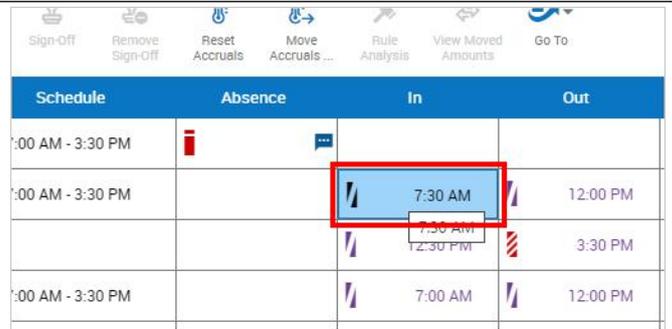
Add Another Note Add

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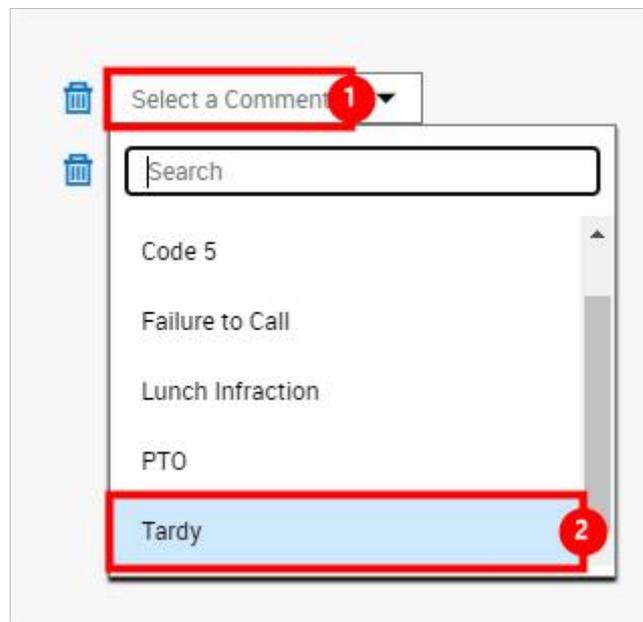
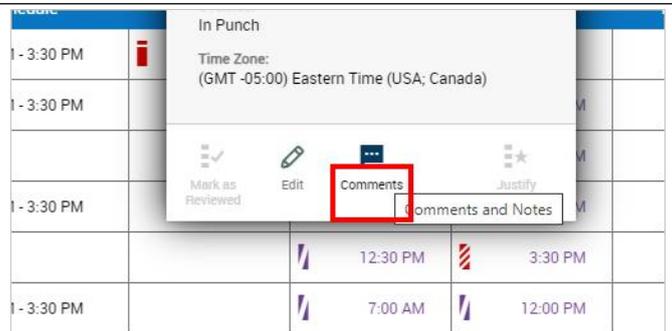
Click on the button **Apply**



If you need to apply a tardy or lunch infraction, right click on the punch that you want to apply this to.



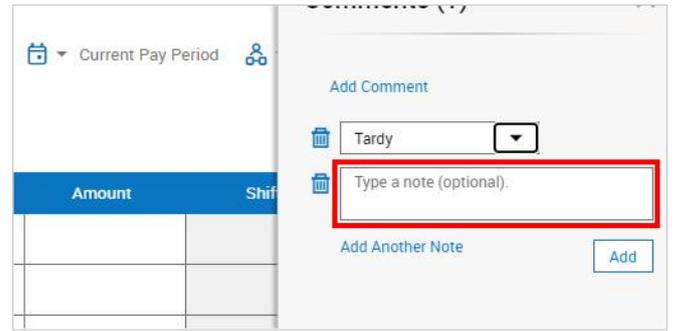
Click on **Comments**



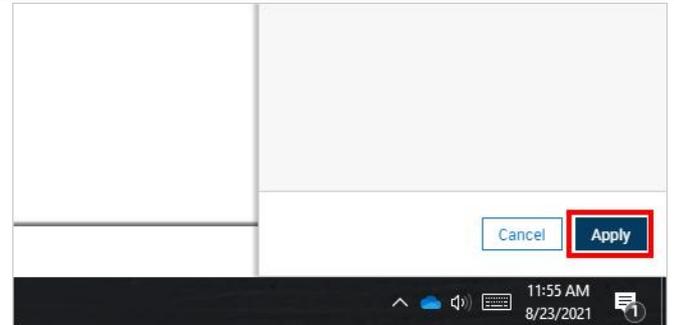
1. Click on the input field **Select a Comment**
2. Click on the correct infraction.

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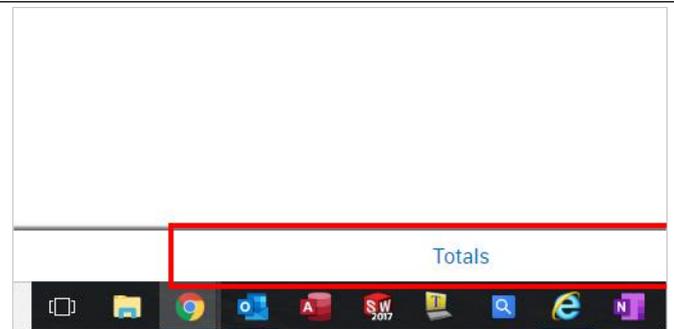
Add a note.



Click on the button **Apply**



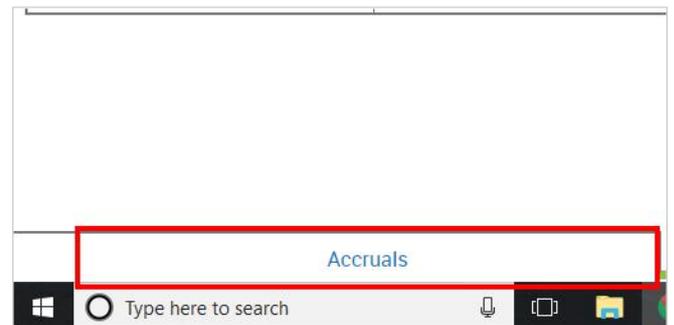
If you want to check the totals for the week to ensure time was calculated properly with the new codes applied, you can check the totals for the week by click the **Totals** tab at the bottom of the screen.



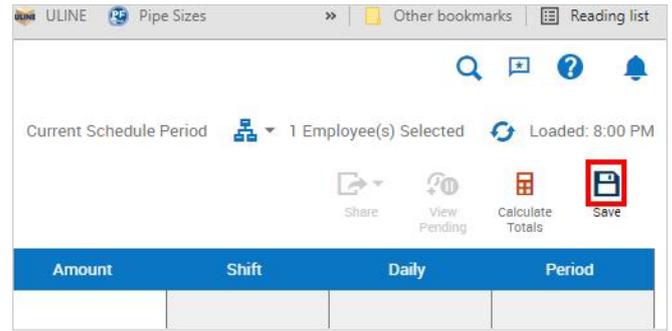
4	Pay Code	↑5	Amount
	ISS-REG		40:00
			40:00

- This will show you how many hours they were paid at the specific paycode, such as regular.

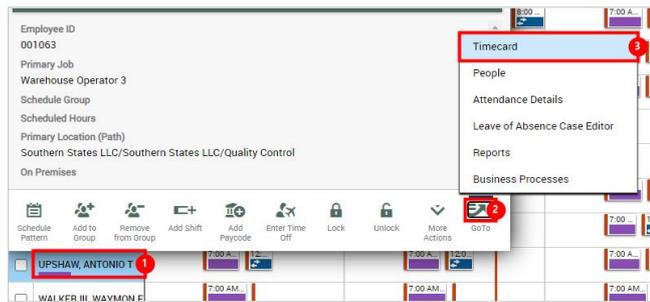
You can also see their Accruals/Balance of Vacation by clicking on the **Accruals** tab on the bottom of the screen.



Click on the button **Save**



10. Retroactively Transfer Departments



1. Right click on the employee that you want to edit.
2. Click on the button **GoTo**
3. Click on the button **Timecard**



1. Click on the Transfer box at the day or time you want the department transfer.
2. Click on the button **Search...**



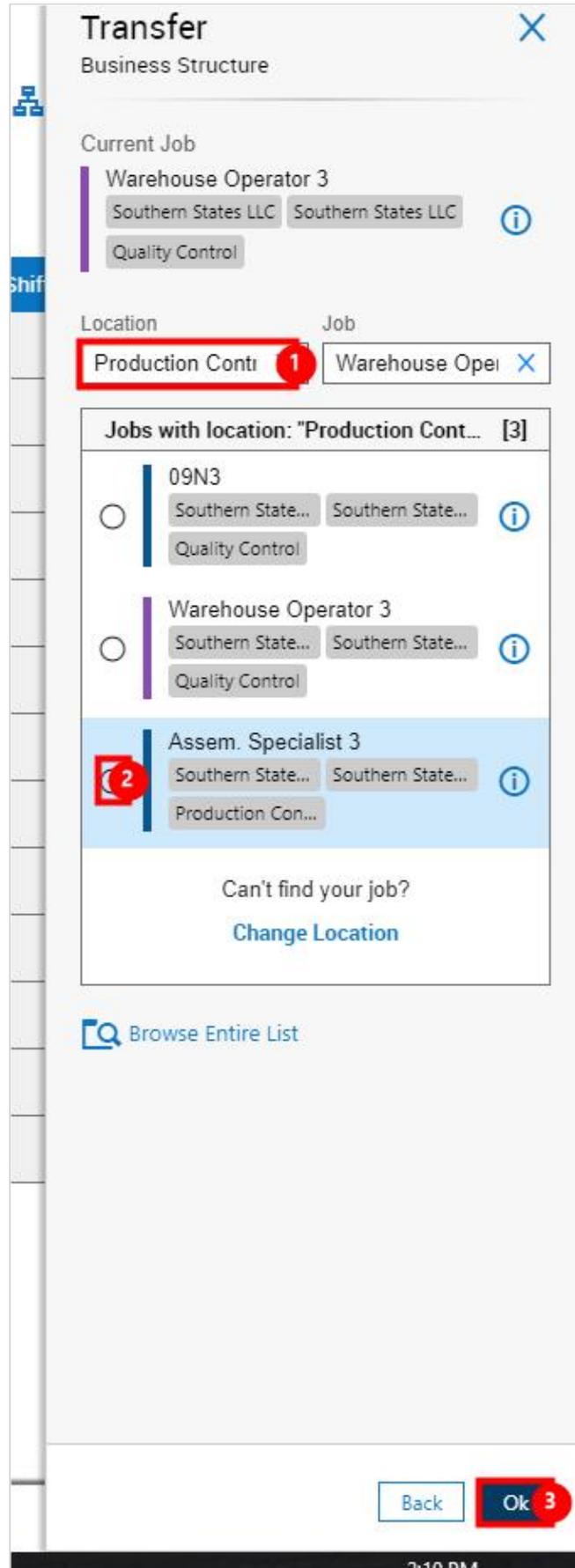
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Click on the button **Add Business Structure**

Amount	Shift
y	8:00

- uthern States LLC/Quali ty Con...
- Work Rule None
- Cost Center None
- Labor Categories ...
- + Add Business Structure**
- + Add Work Rule ▾
- + Add Cost Center ▾

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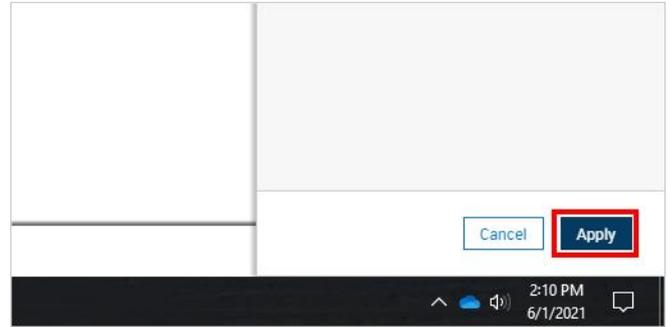


1. Click on the input field **All Locations** - Enter the department you want to transfer the employee to.

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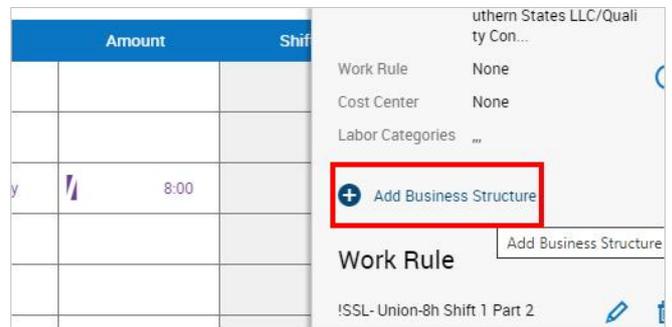
2. Select the job you want from the list.
3. Click on the button **Ok**

Click on the button **Apply**

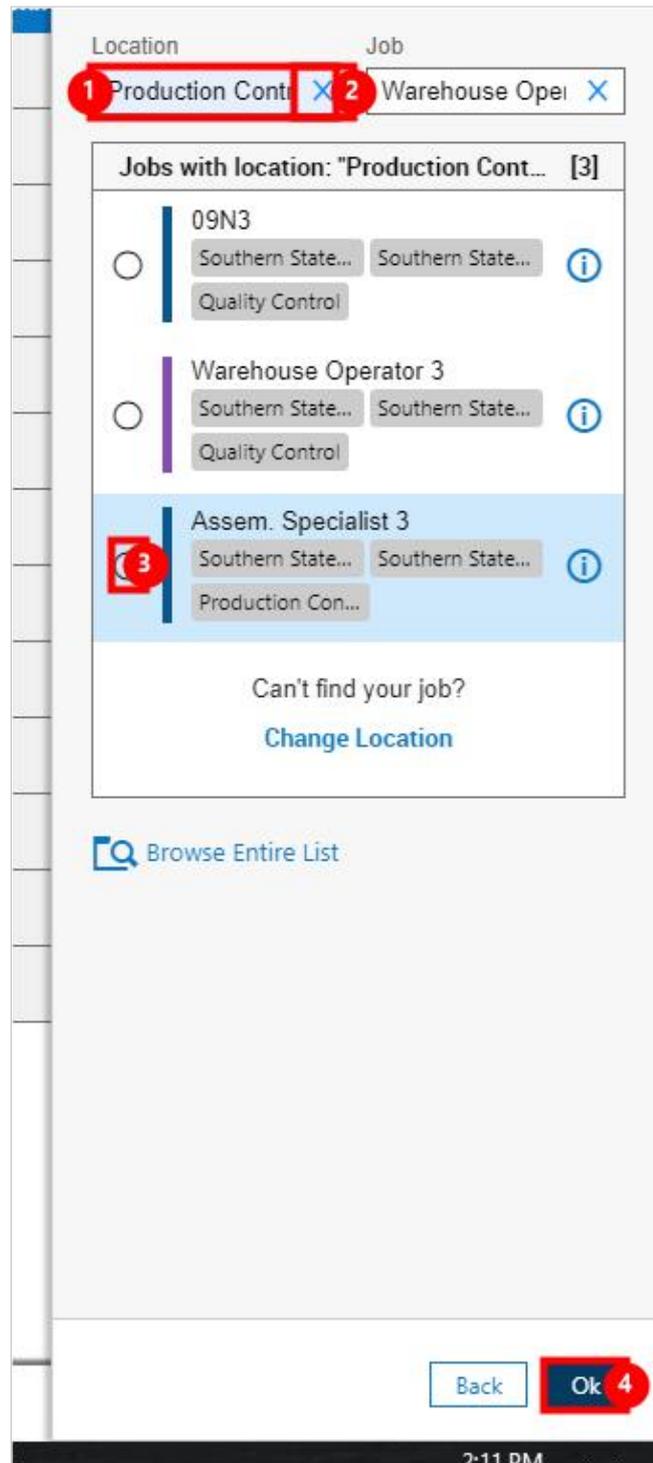


1. For the second half of the shift, do the same as before. Select the transfer box.
2. Click on the button **Search...**

Click on the button **Add Business Structure**



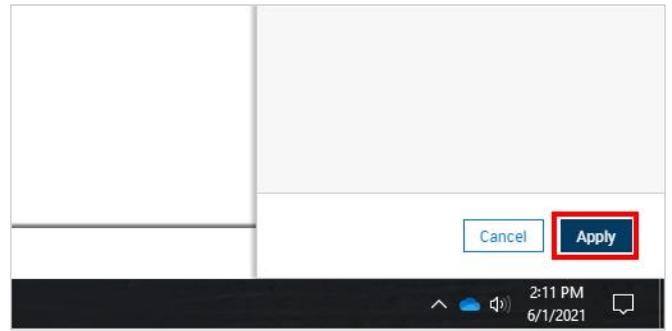
Southern States, LLC	CMilby
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Workforce Dimensions	57/116



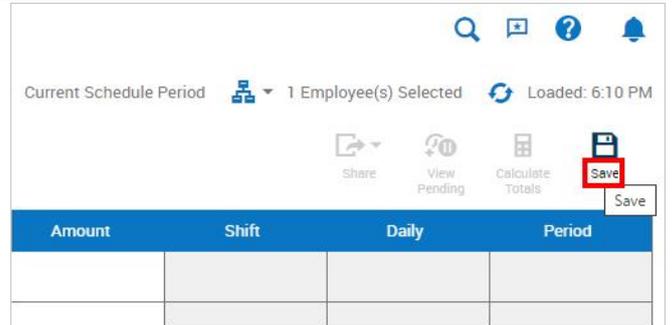
1. Click on the input field **All Locations**
2. Search for the department you want to transfer the employee to.
3. Select the job from the list.
4. Click on the button **Ok**

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Click on the button **Apply**

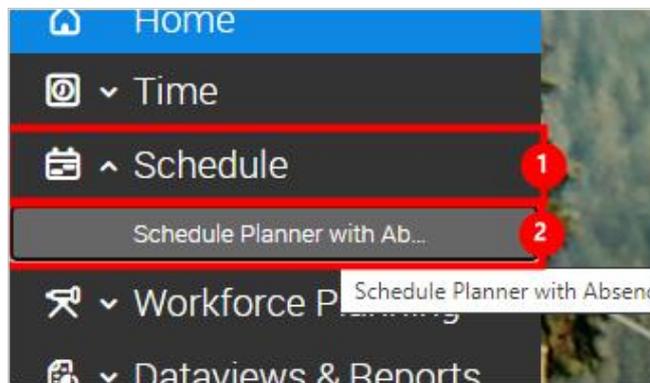
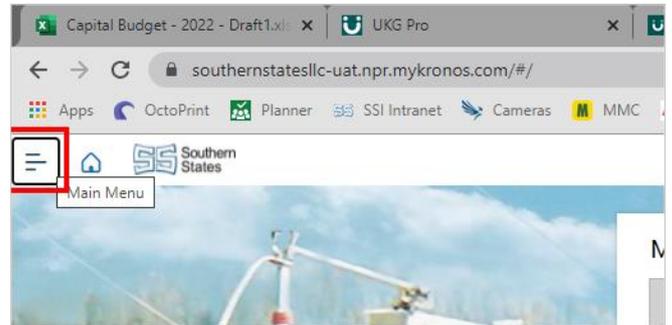


Click on **Save**



11. Approving Time

Click on the button **Main Menu**

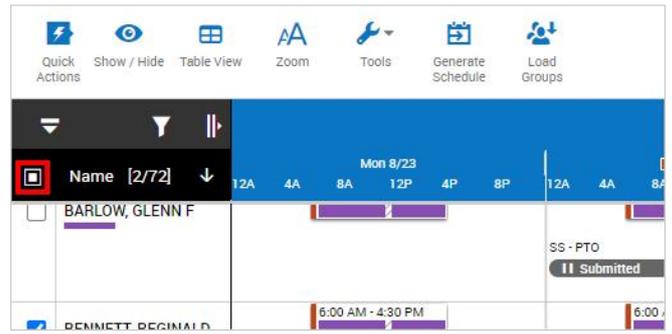


1. Select the Schedule tab.
2. Click on the link **Schedule Planner with Absence Calendar**

<input checked="" type="checkbox"/>	BENNETT, REGINALD	6:00 AM - 4:30 PM
<input type="checkbox"/>	BLACKBURN, FREDRI...	6:00 AM - 4:30 PM
<input checked="" type="checkbox"/>	CLAY, JEFFERY	7:00 AM - 3:30 P
<input type="checkbox"/>	COFFY, MARIUS	7:00 AM - 3:30 P
<input type="checkbox"/>	COLOQUITT EMILY C	7:00 AM - 3:30 P

- Select the checkbox on all the employees that you want to review and approve.

If you want to select all employees, check the box at the top left on the employee list.



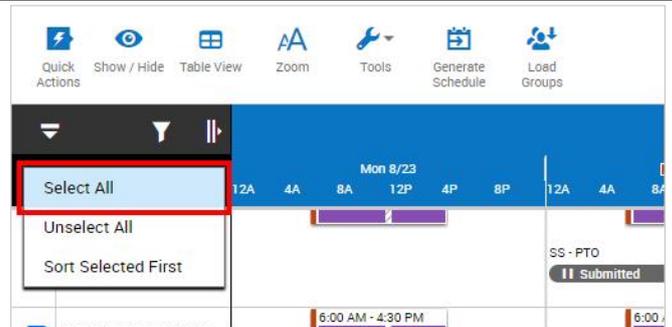
Quick Actions Show / Hide Table View Zoom Tools Generate Schedule Load Groups

Name [2/72]

BARLOW, GLENN F

BENNETT, REGINALD

Click on the button **Select All**



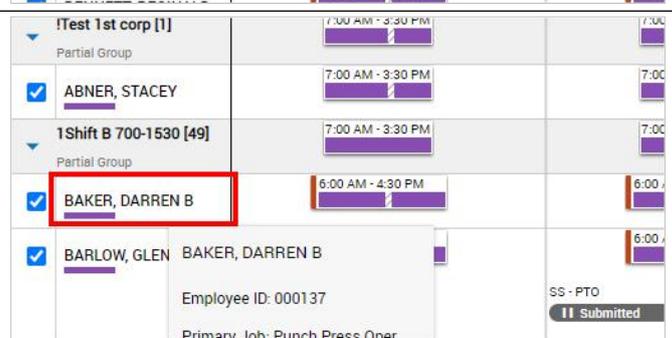
Quick Actions Show / Hide Table View Zoom Tools Generate Schedule Load Groups

Select All

Unselect All

Sort Selected First

Right click on one of the selected employees.



!Test 1st corp [1]

Partial Group

ABNER, STACEY

1Shift B 700-1530 [49]

Partial Group

BAKER, DARREN B

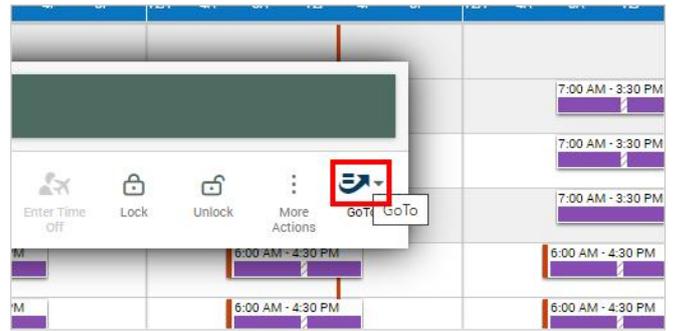
BARLOW, GLEN

BAKER, DARREN B

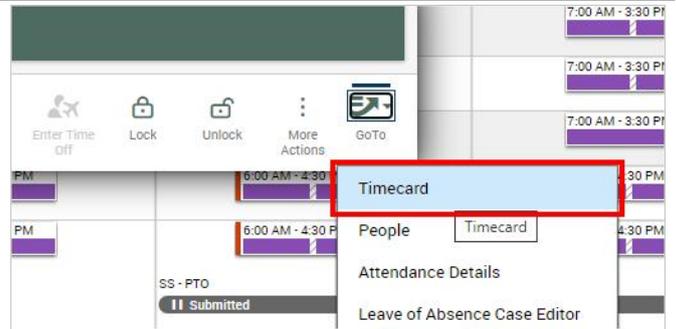
Employee ID: 000137

Primary Job: Punch Press Oper

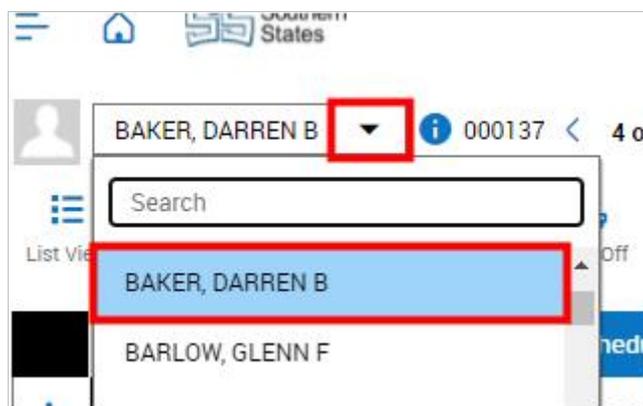
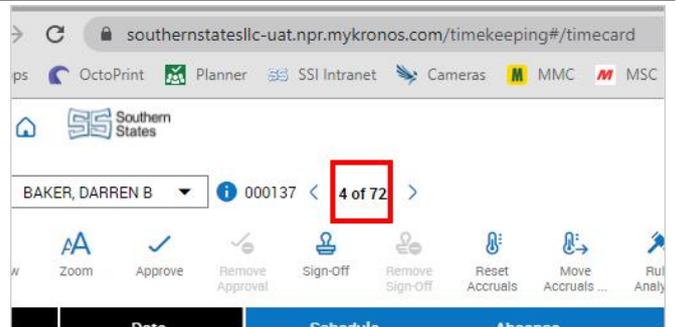
Click on the button **GoTo**



Click on the button **Timecard**



The top left will show you the number of employees that you have selected. You can use the arrows to the left and right of these numbers to navigate through the list.



- You can also use the drop down to navigate to specific employees.



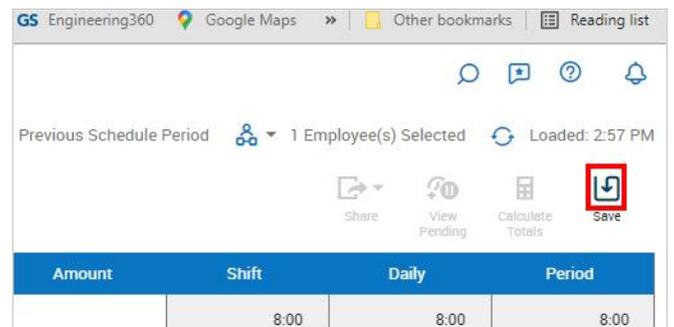
1. The dropdown on the top left of this tab allows you to break the totals down to a daily view. Select 'Daily' for a daily view, and 'All' for the weekly view.
2. Click on the link **Daily**

Once you select the 'Daily' option, just select the day you want to specifically review.

+	🗑️	Mon 8/16	7:00 AM - 3:30 PM	
+	🗑️	Tue 8/17	7:00 AM - 3:30 PM	
+	🗑️	Wed 8/18	7:00 AM - 3:30 PM	
+	🗑️	Thu 8/19	7:00 AM - 3:30 PM	
+	🗑️	Fri 8/20	7:00 AM - 3:30 PM	
+	🗑️	Sat 8/21		

4	Pay Code	5	Amount
	ISS-REG		8:00

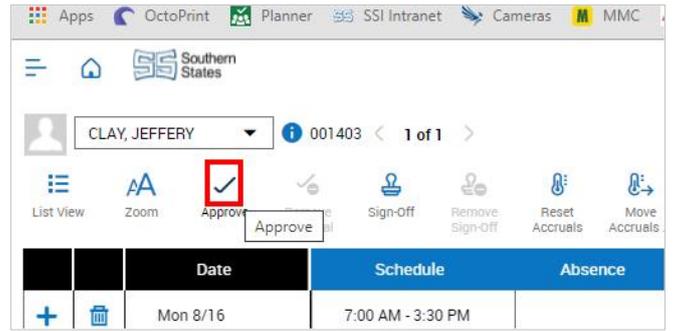
If corrections have been made and everything looks good to go, press the **Save** button in the top right. If no changes have been made, this step will not be available to you. That is okay.



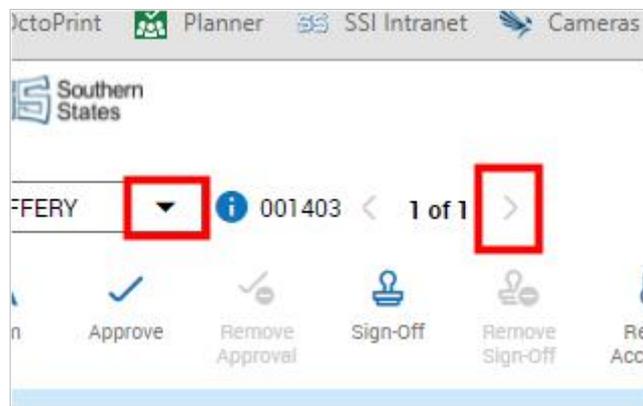
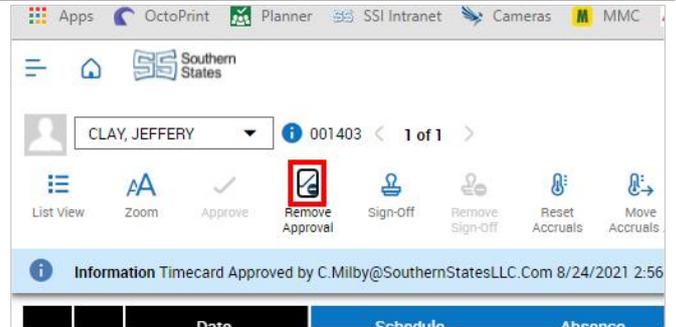
Amount	Shift	Daily	Period
	8:00	8:00	8:00

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To approve the timecard, press the **Approve** button at the top of the screen.



If you need to remove approval and make changes, select the **Remove Approval** button.



- Move to the next employee. Either use the arrow keys to navigate, or the drop down to move to a specific employee.

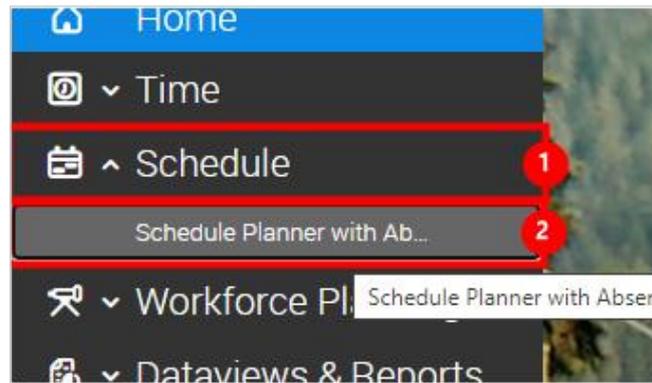
12. Changing Schedule - Day by Day Basis

These instructions are ideal for changing a schedule for an employee(s) that only needs to have a couple days or less changed within their scheduled week. If you need to see how to transfer an employee to a specific department or another shift such as first, second, or third, please see that tutorial separately.

Click on the button **Main Menu**

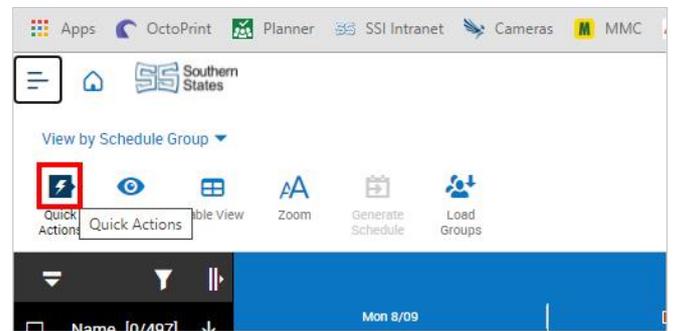


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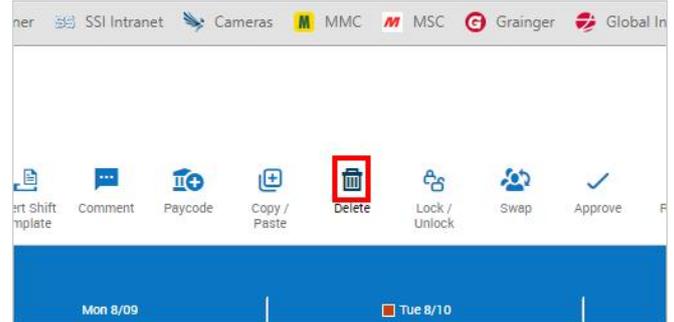


1. Click on the item **Schedule Schedule Planner with Absence Calendar**
2. Click on the link **Schedule Planner with Absence Calendar**

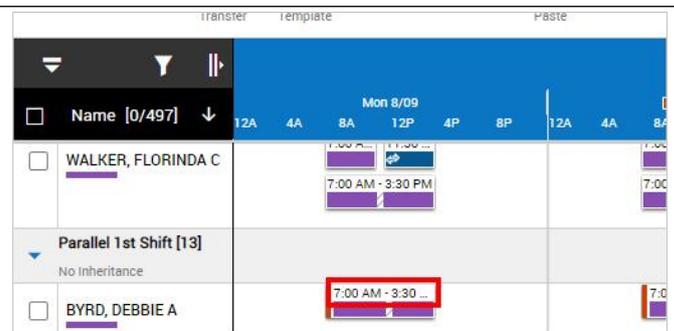
Click on the button **Quick Actions**. This will reveal more button options.



Click on the button **Delete** to toggle on the delete function.

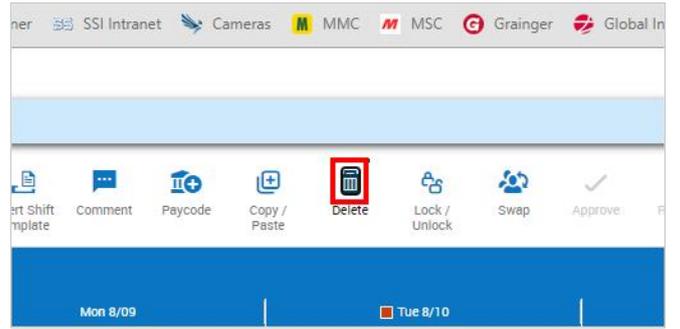


Select the shift that you would like to delete. Make sure you are selecting the right employee's schedule.

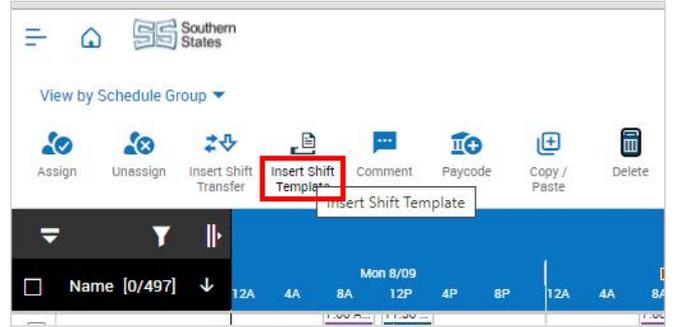


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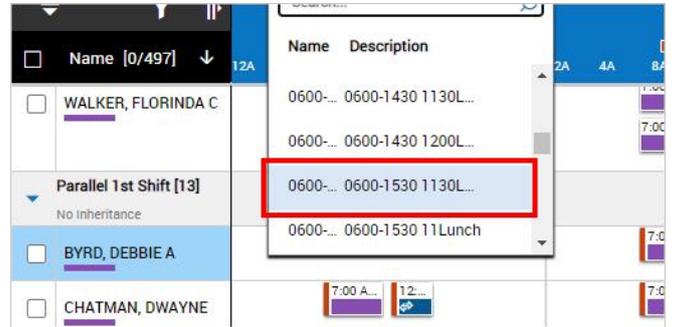
Click the **Delete** again to toggle off the delete function.



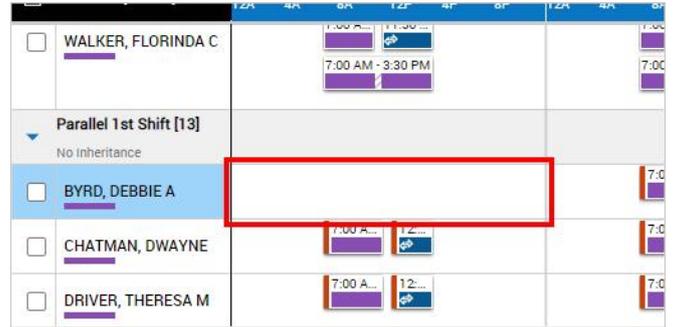
Click on **Insert Shift Template** to toggle on the function.



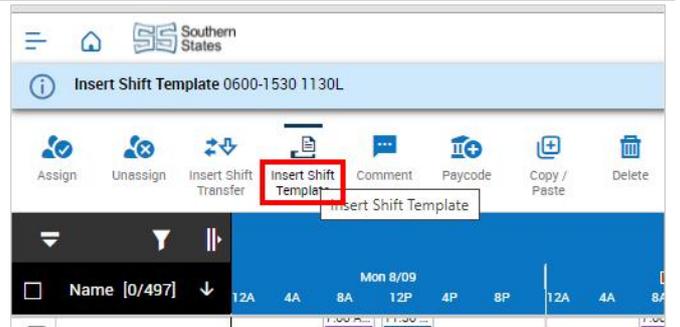
Select the shift you want the employee to work.



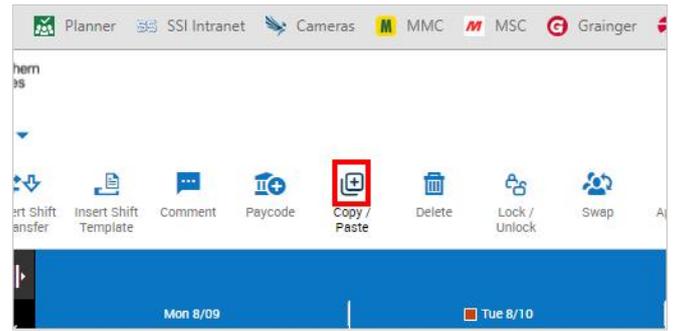
Select the day that you want to paste the shift. This will copy the shift template to this day. You can select multiple days and different employees, just make sure that the undesired schedules are also deleted.



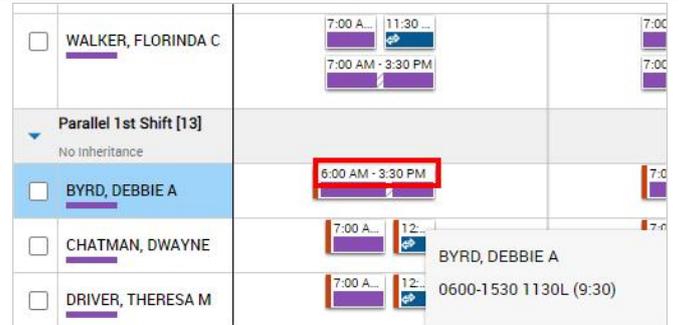
Click on **Insert Shift Template** to toggle off the function.



If you've already finished inserting a shift, and you want to add this shift to other days and/or other employees, you can copy and paste the listed schedule. Select the **Copy / Paste** button to toggle this function on.

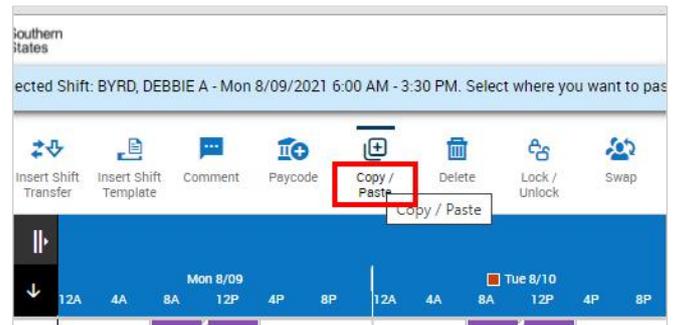


Click the shift that you want to copy to other days and/or employees.

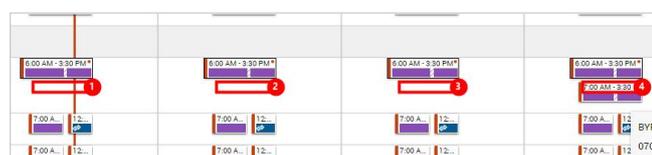
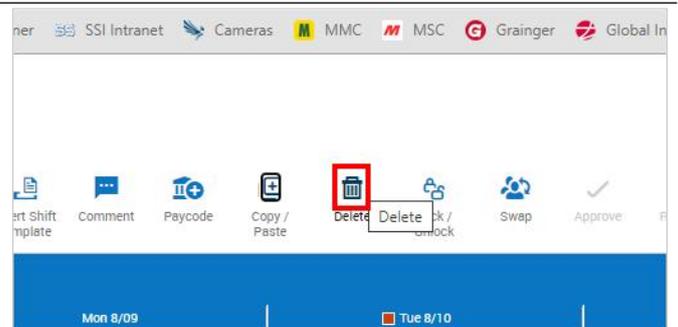


- Select the days you want to that specific employee to work the scheduled shift. This will paste the copied schedule on these days.

Click on **Copy / Paste** to toggle this function off.



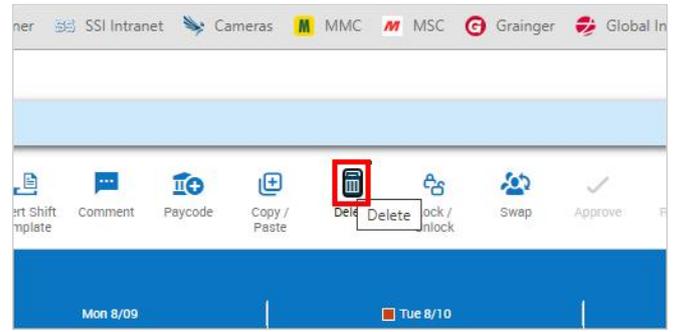
Click on the **Delete** to toggle on the delete function.



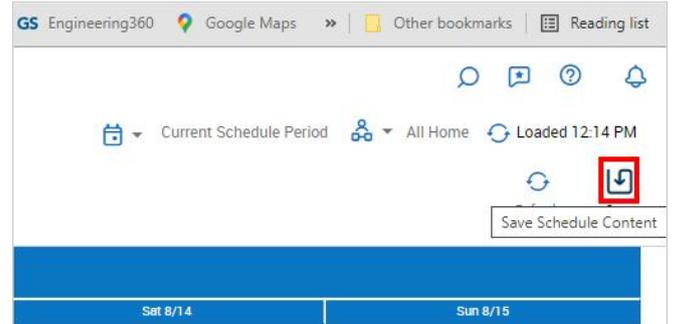
1. Delete the undesired schedules.

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Click the **Delete** button to toggle off the delete function.



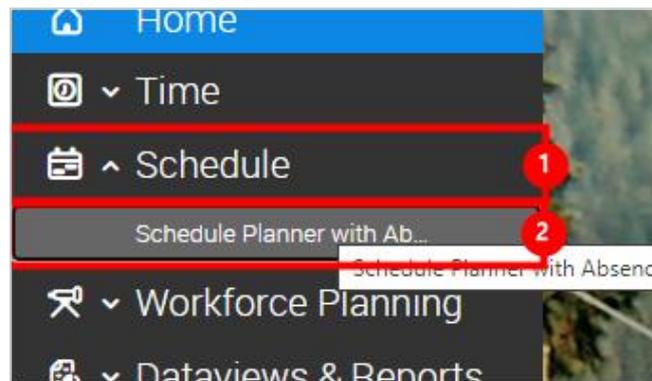
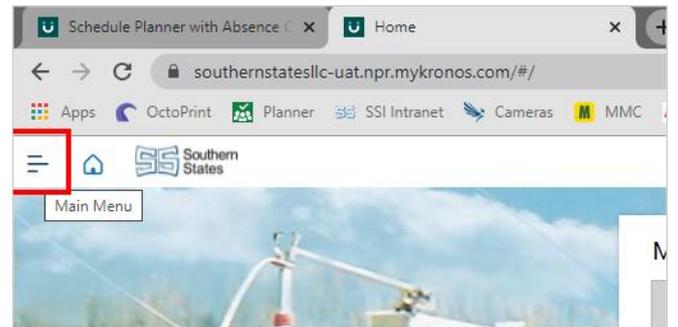
Press the **Save Schedule Content** key in the top right. If you need to transfer the employee to another shift or another department as well, please see that tutorial for instructions.



13. Shift Transfer - 1st to 2nd to 3rd Shift Changes

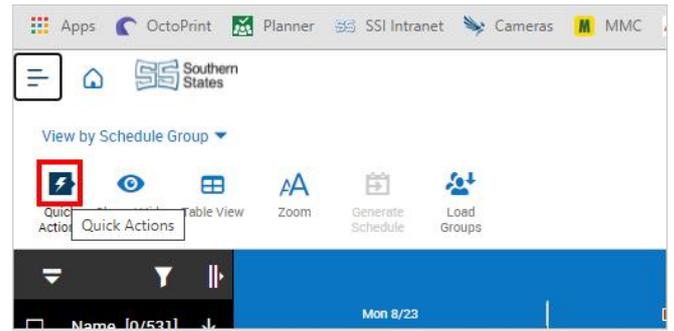
This tutorial is about transferring an employee from on shift to another, such as first shift to second shift.

Click on the button **Main Menu**

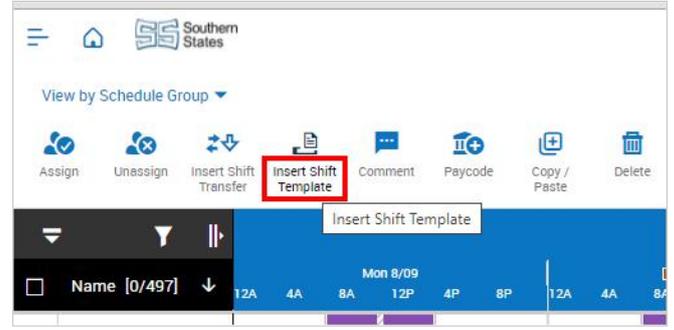


1. Click on the Schedule tab.
2. Click on the link **Schedule Planner with Absence Calendar**

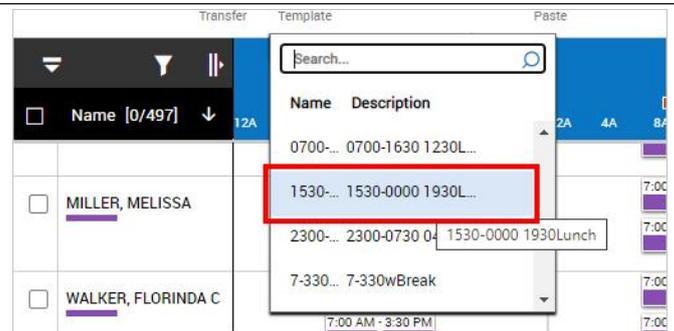
Click on the button **Quick Actions**



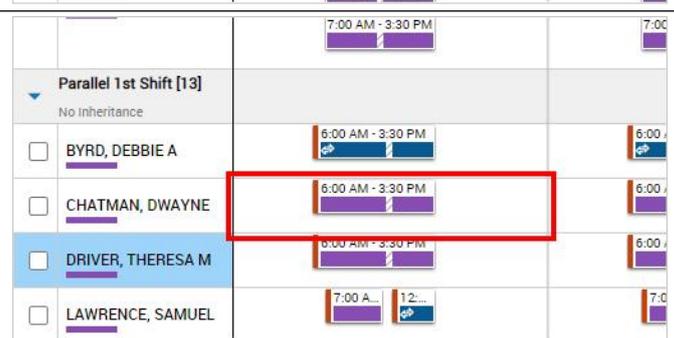
Click on **Insert Shift Template**



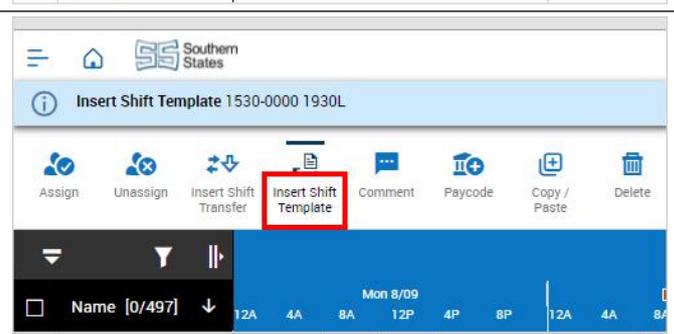
Select the schedule you want the employee to work.



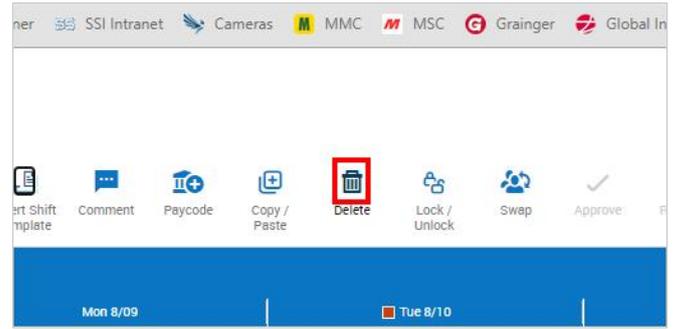
Find the employee's schedule that you want to change. Click on the employee's day that you want to paste the schedule. You will now see two schedules on this day.



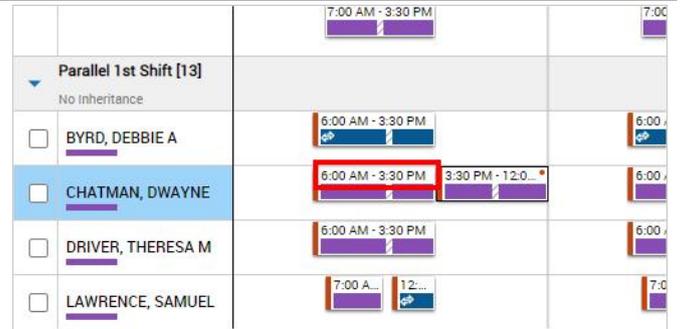
Select the **Insert Shift Template** button to stop pasting the schedule.



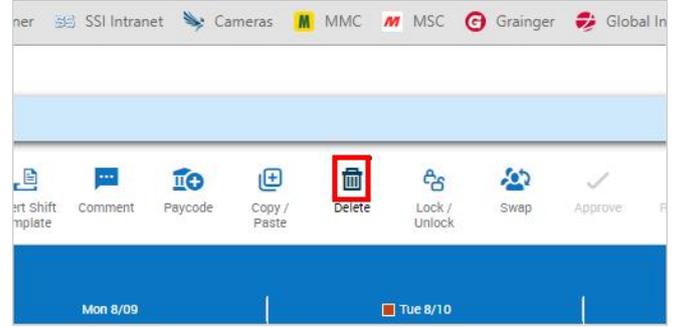
Select the **Delete** button.



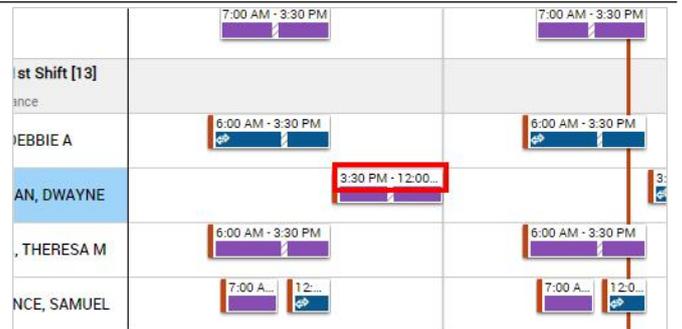
Delete the overlapping, undesired shift.



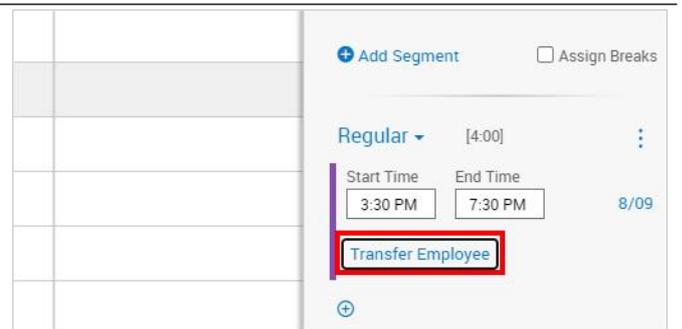
Click the **Delete** to toggle off the delete function.



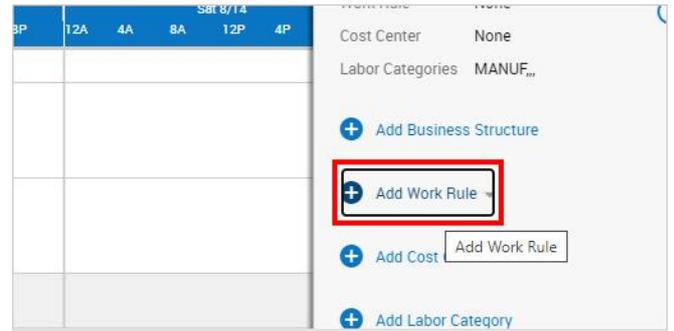
Double click on the shift you just inserted.



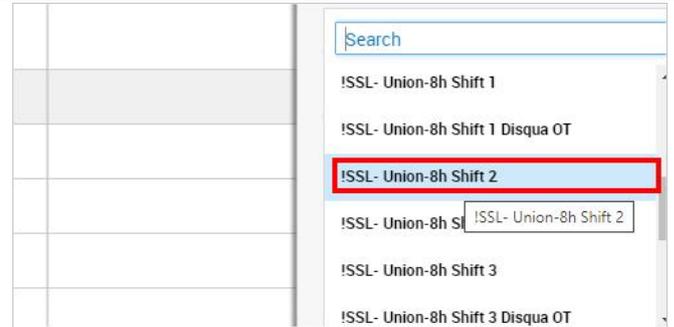
Click on the button **Transfer Employee**



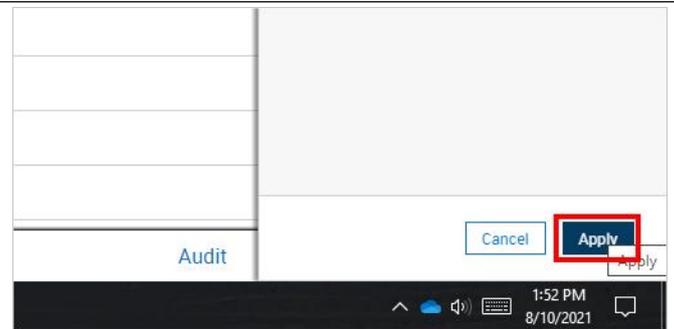
Click on the button **Add Work Rule**



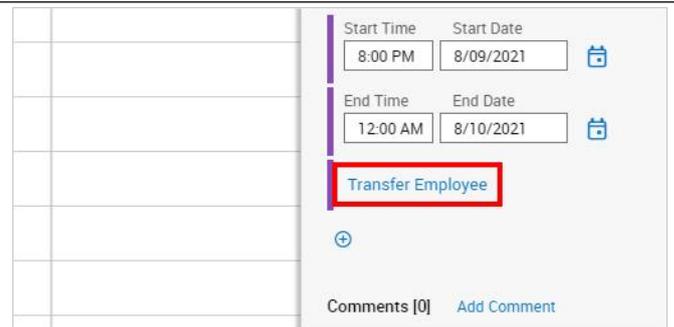
Select the corresponding shift schedule. In this case, we select **!SSL- Union-8h Shift 2** since we are transferring this employee to the second shift.



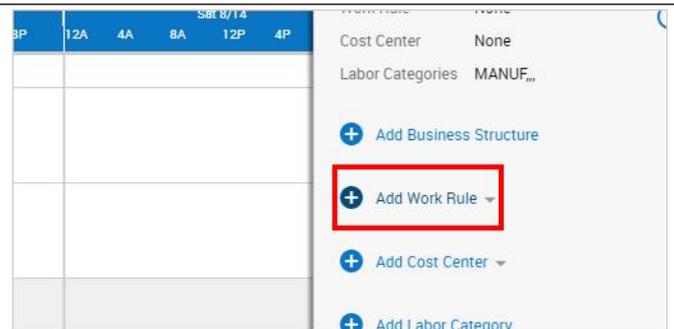
Click on the button **Apply**



Click on the button **Transfer Employee**



Click on the button **Add Work Rule**

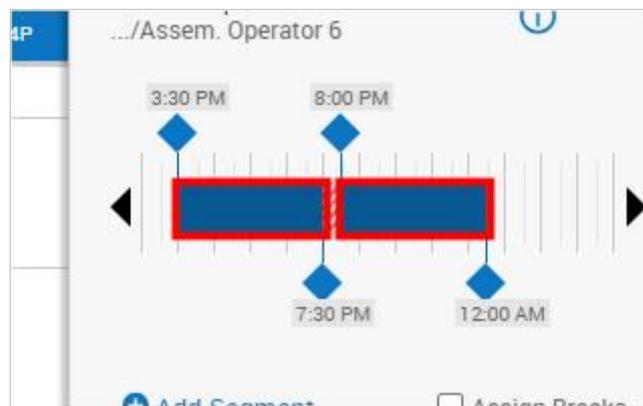
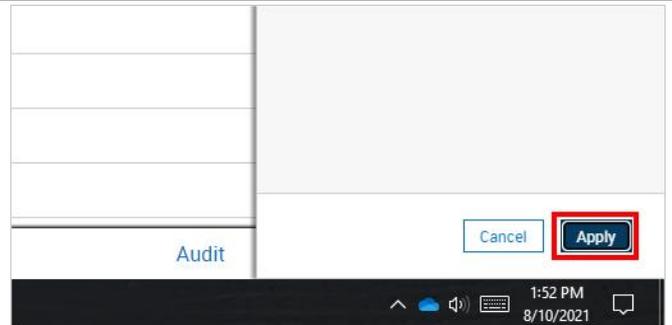


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Select the appropriate shift for the transfer. We do this twice since the shift is broken into two segments. Ensure BOTH segments of the shift are set to have this transfer.

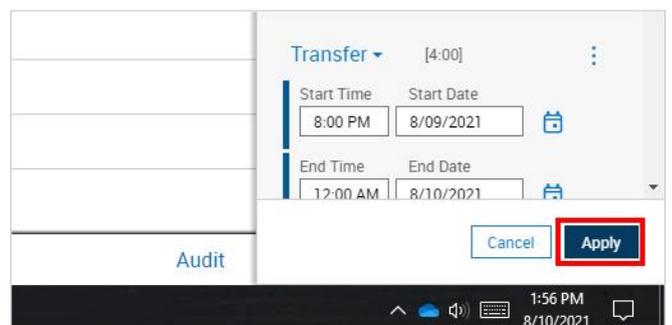


Click on the button **Apply**

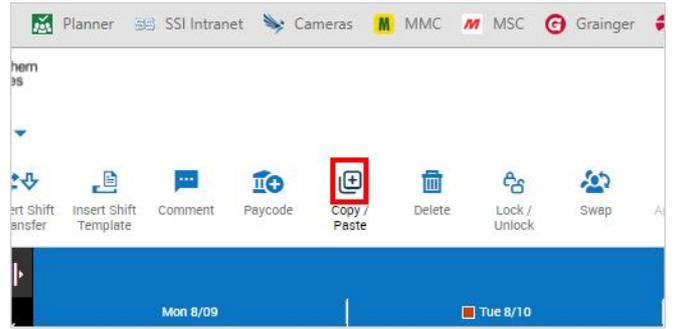


- The entire shift line will be blue if transfers have been applied to both halves of the shift. It will also appear blue on the full schedule.

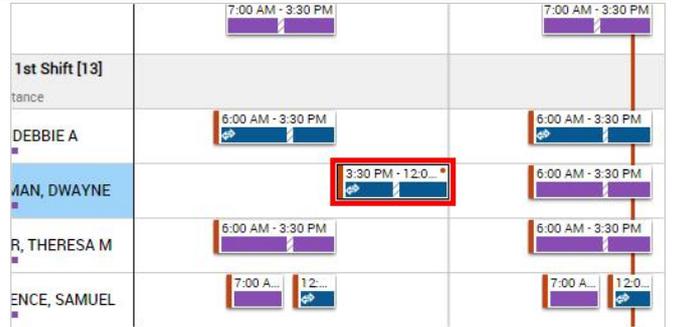
Click on the button **Apply**



If you want to paste this shift transfer across multiple days, select the **Copy / Paste** button.

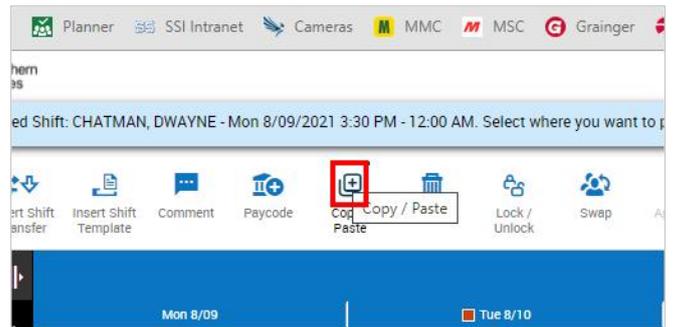


Select the shift you would like to copy.

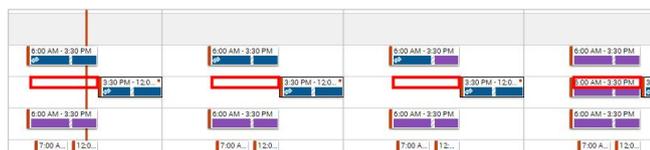
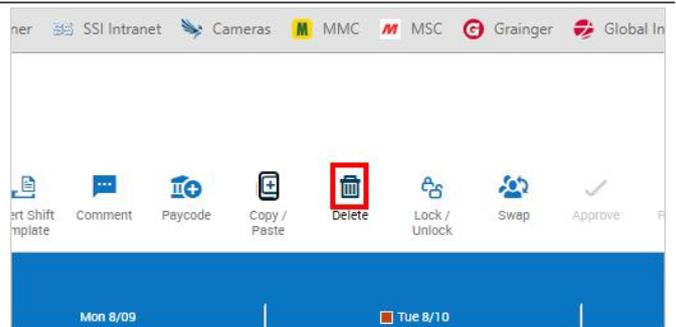


- Select the days you want the employee to work on the copied schedule. This will paste the schedule on these days.

Click the **Copy / Paste** key to toggle off this function.



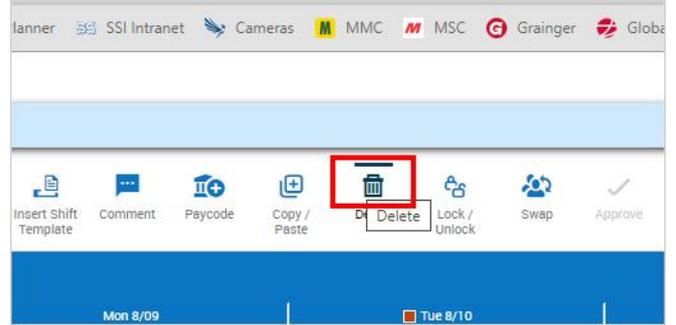
Select the **Delete** to toggle on the delete function.



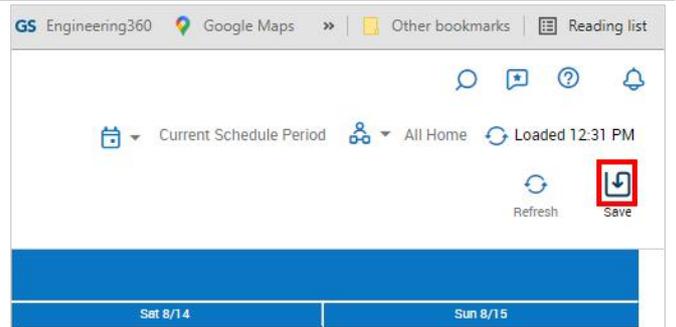
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- Click on any of the undesired and overlapping schedules. This will remove them from the calendar for that day.

Click on the delete key to toggle off the delete function.



Click on the button **Save Schedule Content**



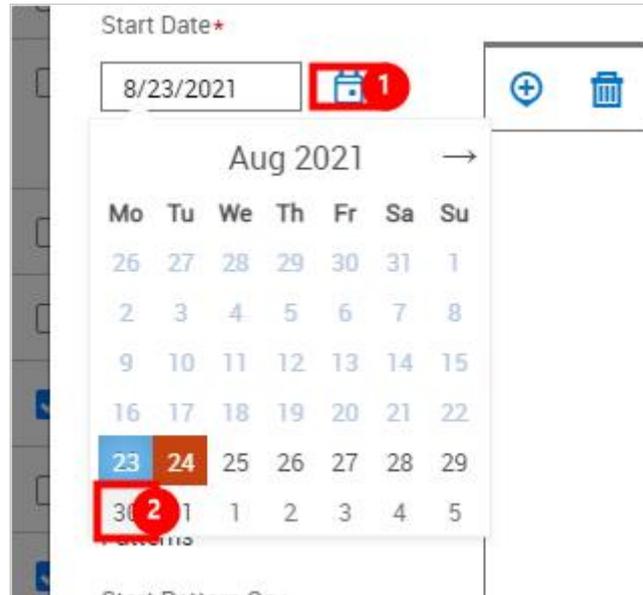
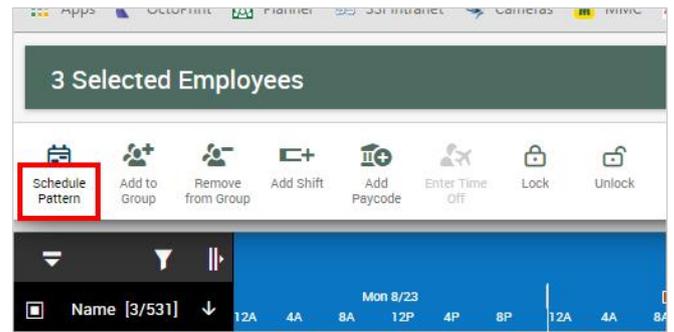
If you want an employee to work on a different shift for a few weeks, you can change their schedule pattern for that time.

<input checked="" type="checkbox"/>	Allen, Kenneth	7:00 AM - 3:30 P
<input type="checkbox"/>	ANDERSON, DARIUS	7:00 AM - 3:30 P
<input checked="" type="checkbox"/>	ANDERSON, JACQUEL...	7:00 AM - 3:30 P
<input type="checkbox"/>	ANDERSON, RASHED...	7:00 AM - 3:30 P
<input type="checkbox"/>	ANDERSON, WAYNE	7:00 AM - 3:30 P
<input checked="" type="checkbox"/>	ANGELES, GEOVANI	7:00 AM - 3:30 P
<input type="checkbox"/>	ASKEW CHARLIE F	7:00 AM - 3:30 P

- Click the checkbox next to all of the employees that need to have their scheduled changed. Right click on any of the employee's that you've checked.

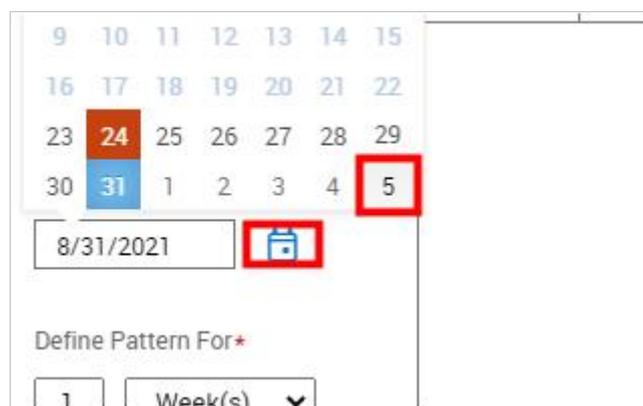
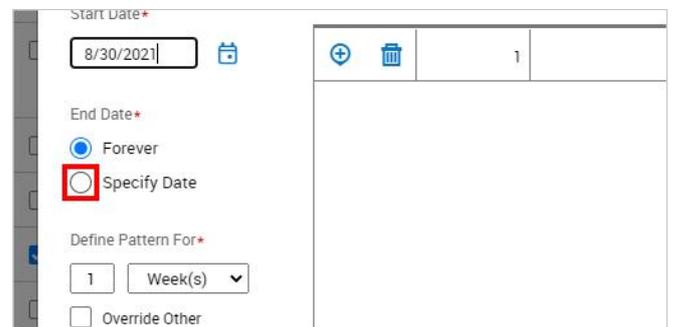
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Click on **Schedule Pattern**



1. Select the start date for this schedule.

Click on the radio button **Specify Date**. After this date, the employee will go back to their standard schedule.



- Select the end date for this schedule.

Click on the checkbox **Override Other Patterns**



9/05/2021

Define Pattern For*

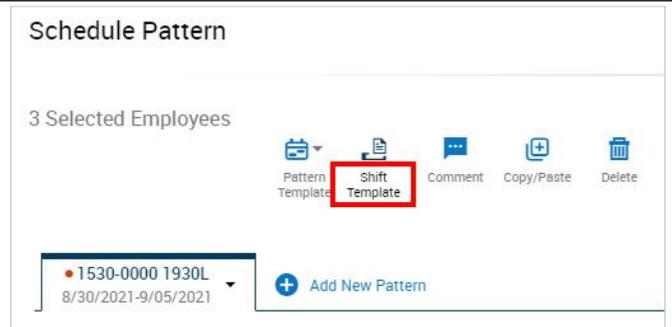
1 Week(s)

Override Other Patterns

Start Pattern On*

Week 1

Click on **Shift Template**



Schedule Pattern

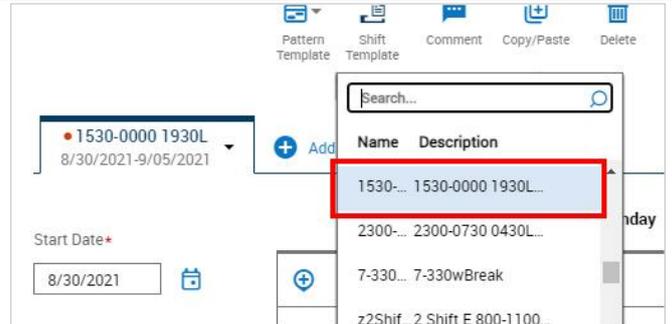
3 Selected Employees

Pattern Template Shift Template Comment Copy/Paste Delete

1530-0000 1930L
8/30/2021-9/05/2021

+ Add New Pattern

Select the shift you want to transfer the employee to.



Pattern Template Shift Template Comment Copy/Paste Delete

1530-0000 1930L
8/30/2021-9/05/2021

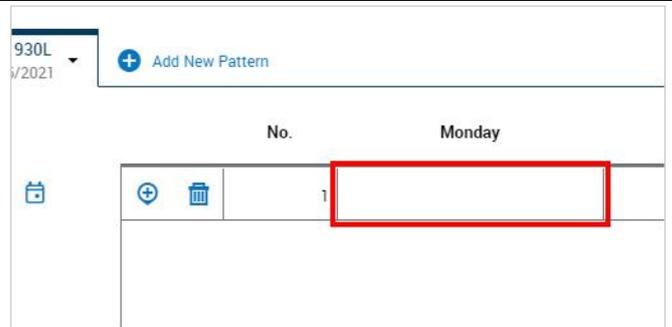
+ Add

Start Date*
8/30/2021

Search...

Name	Description
1530-...	1530-0000 1930L...
2300-...	2300-0730 0430L...
7-330-...	7-330wBreak
z2Shif...2	Shift E 800-1100...

Select one of the days of the week to paste this shift.

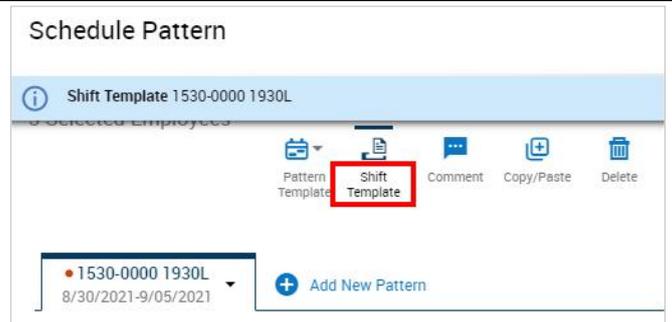


930L
8/30/2021

+ Add New Pattern

No.	Monday
1	

Click on the **Shift Template** button to toggle this function off.



Schedule Pattern

Shift Template 1530-0000 1930L

3 Selected Employees

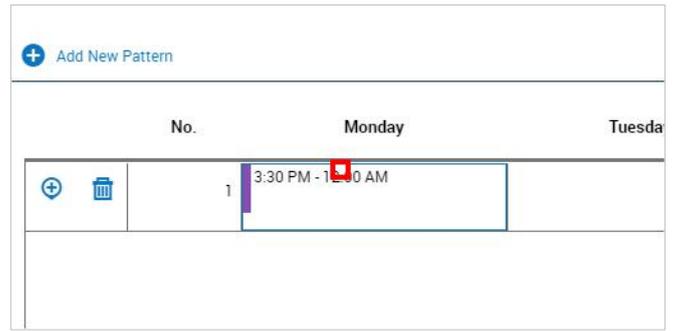
Pattern Template Shift Template Comment Copy/Paste Delete

1530-0000 1930L
8/30/2021-9/05/2021

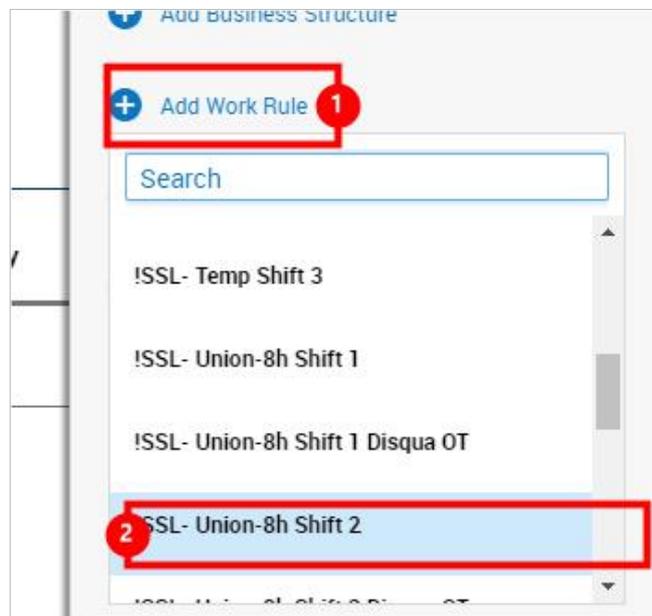
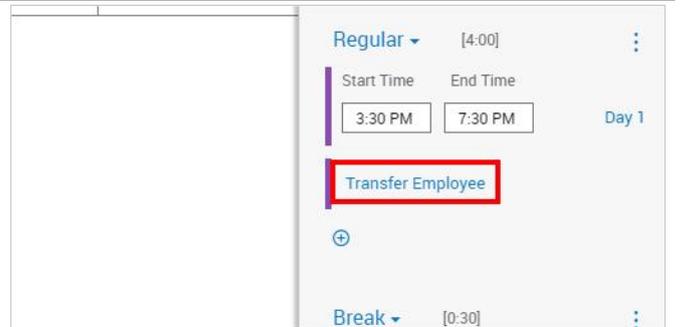
+ Add New Pattern

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Double click on the schedule you just pasted. This will bring us to a detailed view of the schedule.

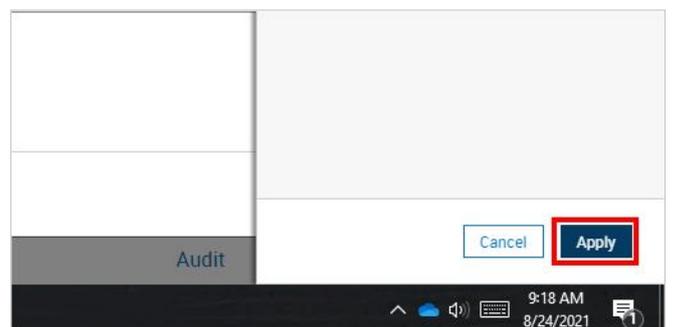


Click on the button **Transfer Employee**



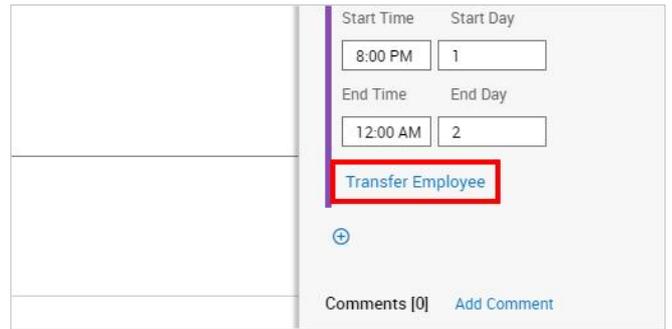
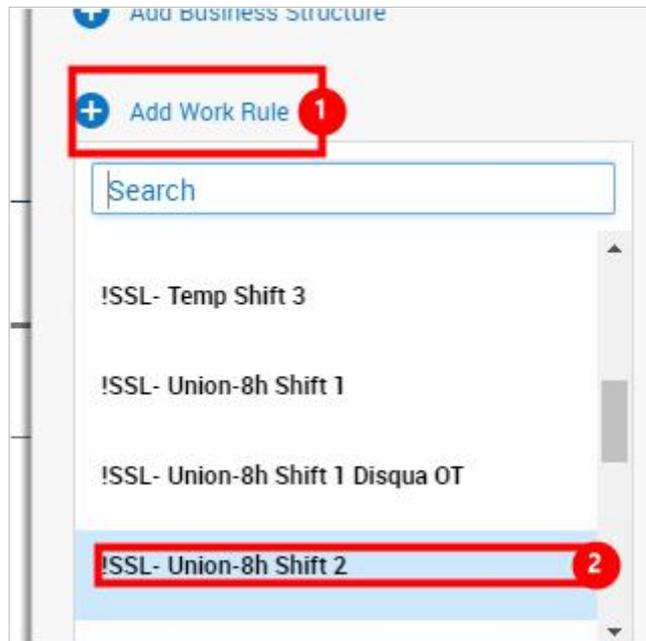
1. Click on the button **Add Work Rule**
2. Select the corresponding work rule. Since we are transferring this employee to second shift, we select **ISSL- Union-8h Shift 2**.

Click on the button **Apply**



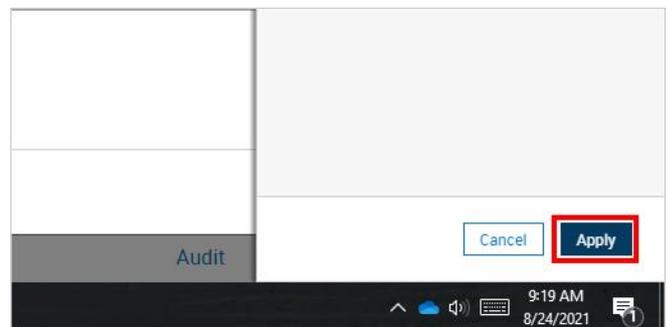
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Scroll down, and on the second half of the schedule, select **Transfer Employee** again.

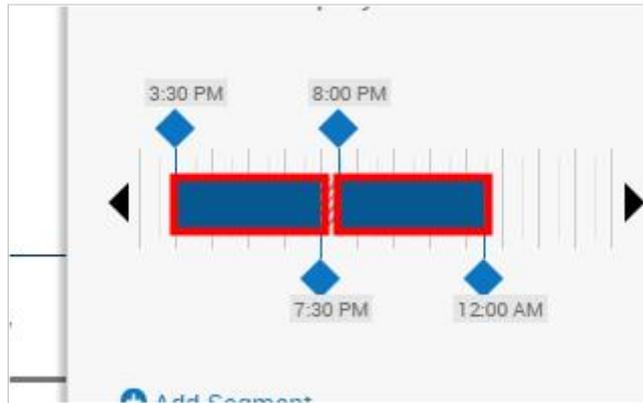



1. Click on the button **Add Work Rule**
2. Select the correct work rule for this shift.

Click on the button **Apply**

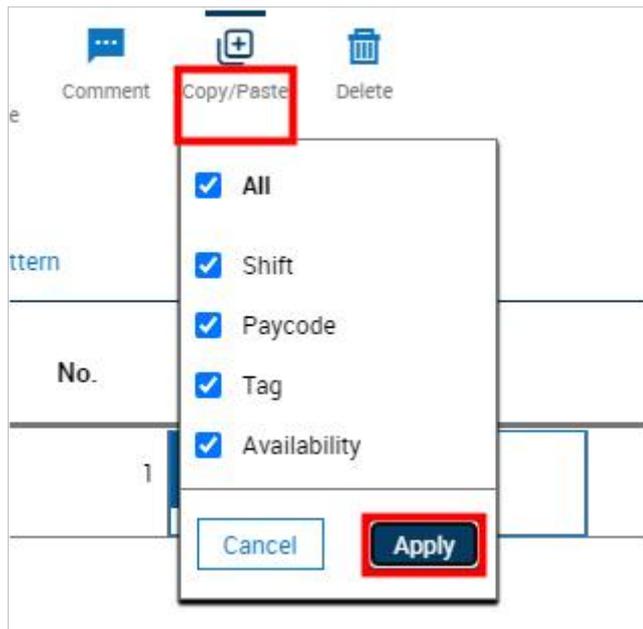
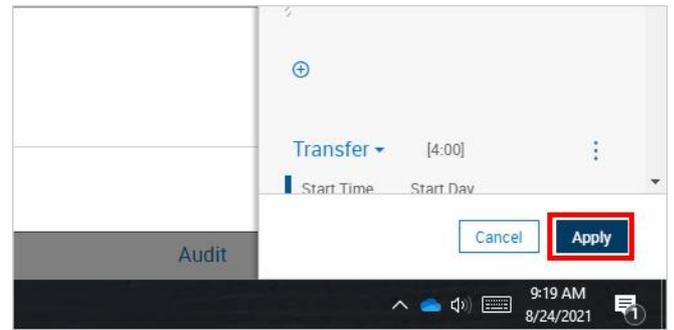


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- The schedule bar at the top of this tab should now appear blue, showing a transfer has been applied to the full shift.

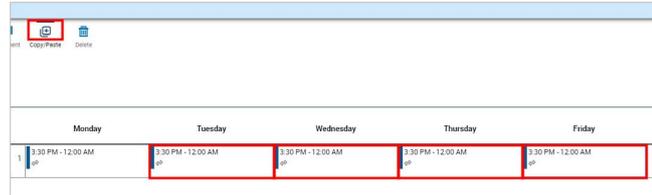
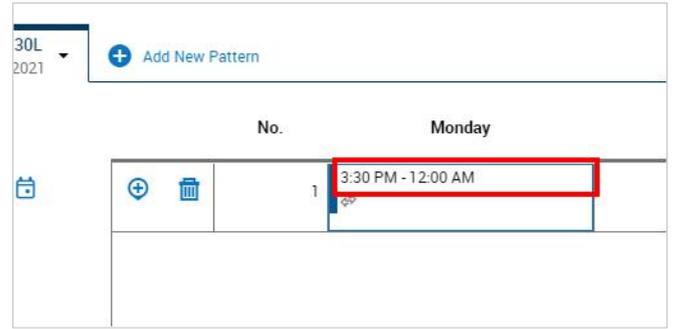
Click on the button **Apply**



- Click on **Copy/Paste**
- Click on the button **Apply**

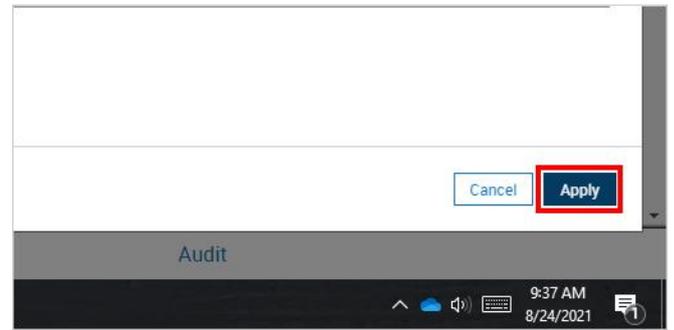
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Select the schedule that we've modified.

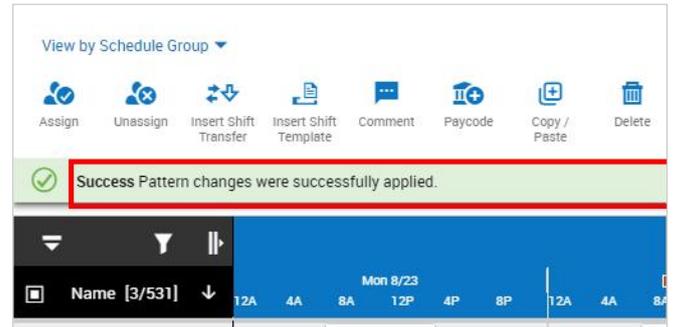


- Click on the days for the remainder of the week to paste the schedule.

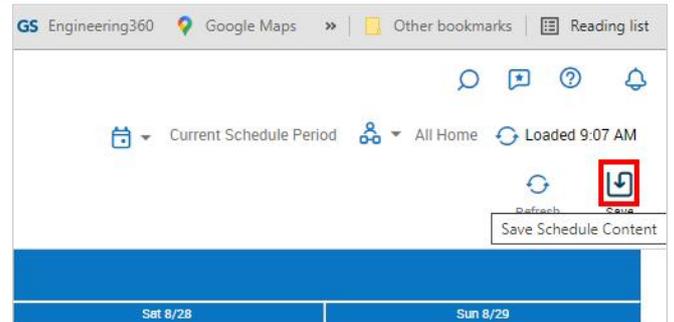
Click on the button **Apply**



You should get a confirmation message that the changes were applied successfully. Check the schedule to ensure everything is correct.



Click on the button **Save Schedule Content**



14. Changing Schedule - Week by Week Basis

This tutorial is mainly for changing schedules that need a full week or more changed. For changes to a single or few days, please see that specific tutorial.

<input checked="" type="checkbox"/>	ADAMS, CHRISTOPHER	7:00 AM - 3:30 P
<input type="checkbox"/>	Alexander, Quartney	3:30 ... 7:00 AM - 3:30 P
<input checked="" type="checkbox"/>	ALFRED, NATHAN	7:00 AM - 3:30 P
<input type="checkbox"/>	ALLEN, ANTAVIOUS	7:00 AM - 3:30 P
<input type="checkbox"/>	Allen, Kenneth	7:00 AM - 3:30 P
<input type="checkbox"/>		7:00 AM - 3:30 P

- On the Schedule Planner page, check the checkboxes next to the employee(s) you want to work with.

Right click on one of the employees you have checked off.

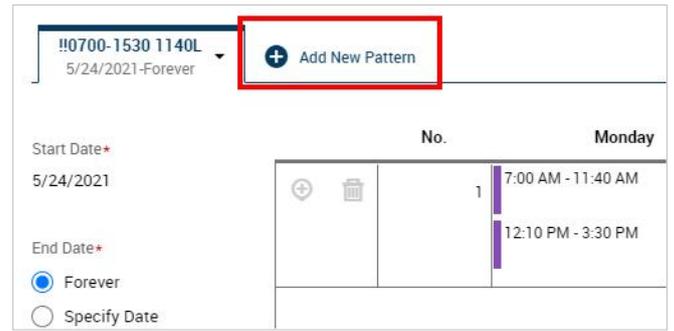
<input checked="" type="checkbox"/>	ALFRED, NATHAN	7:00 AM - 3:30 PM
<input type="checkbox"/>	ALLEN, ANTAVIOUS	7:00 AM - 3:30 PM
<input checked="" type="checkbox"/>	Allen, Kenneth	7:00 AM - 3:30 PM
<input type="checkbox"/>	ANDERSON, DARIUS	7:00 AM - 3:30 PM
<input type="checkbox"/>	ANDERSON, JACQUEL...	7:00 AM - 3:30 PM

Select the Schedule Pattern button.

<input checked="" type="checkbox"/>	ADAMS, CHRISTOPHER	7:00 AM - 3:30 PM
<div style="background-color: #334d5b; color: white; padding: 5px; text-align: center;">3 Selected Employees</div> <div style="display: flex; justify-content: space-between; border-top: 1px solid #ccc; border-bottom: 1px solid #ccc;"> <div style="border: 1px solid red; padding: 2px;"></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>		
<input checked="" type="checkbox"/>	Allen, Kenneth	7:00 AM - 3:30 PM
<input type="checkbox"/>	ANDERSON, DARIUS	7:00 AM - 3:30 PM

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Click on the button **Add New Pattern**



!!0700-1530 1140L
5/24/2021-Forever

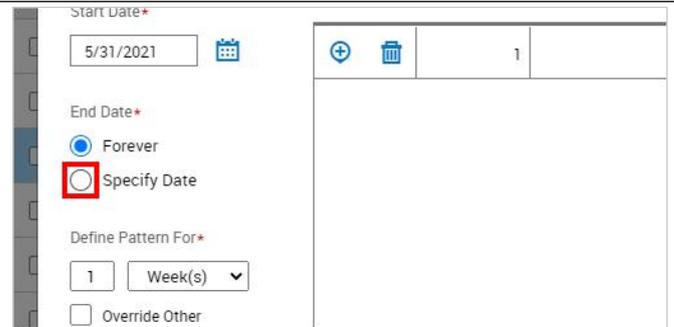
+ Add New Pattern

Start Date* 5/24/2021

End Date* Forever Specify Date

No.	Monday
1	7:00 AM - 11:40 AM 12:10 PM - 3:30 PM

Click on the radio button **Specify Date**



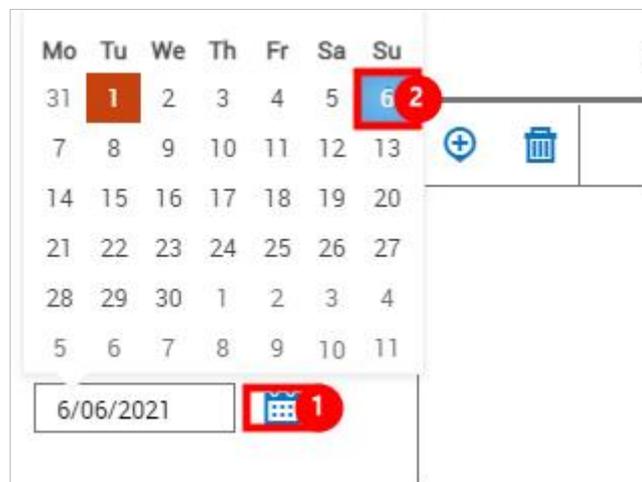
Start Date* 5/31/2021

End Date* Forever Specify Date

Define Pattern For* 1 Week(s)

Override Other

No.	Monday
1	



Mo	Tu	We	Th	Fr	Sa	Su
31	1	2	3	4	5	6 2
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

6/06/2021

1. Click on **Open Calendar**
2. Select the date that you want this schedule pattern to end. If you want an employee to have this schedule for two weeks, set the end of the pattern to be two weeks out

Click on the checkbox **Override Other Patterns**



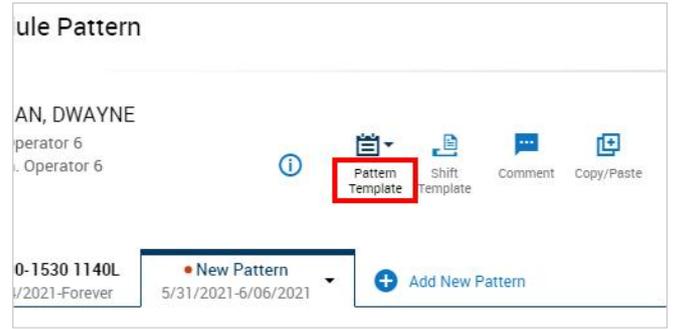
6/06/2021

Define Pattern For* 1 Week(s)

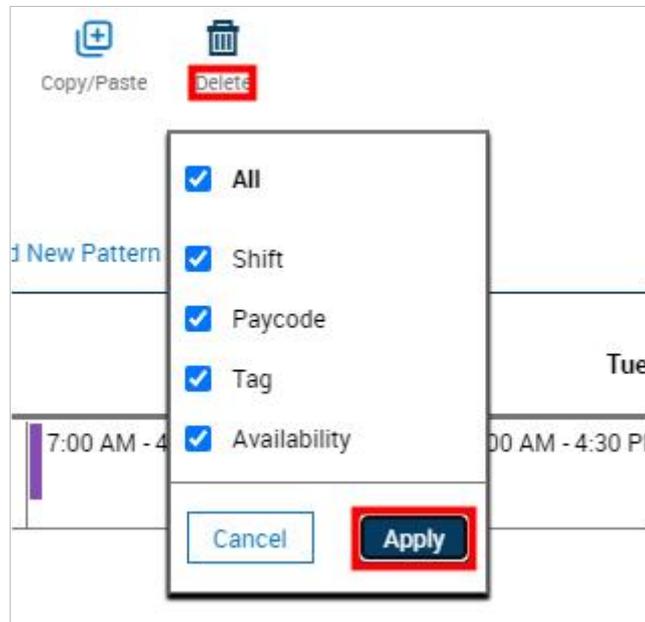
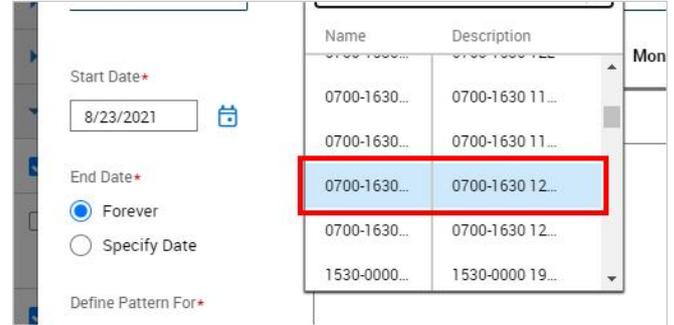
Override Other Patterns

Start Pattern On* Week 1

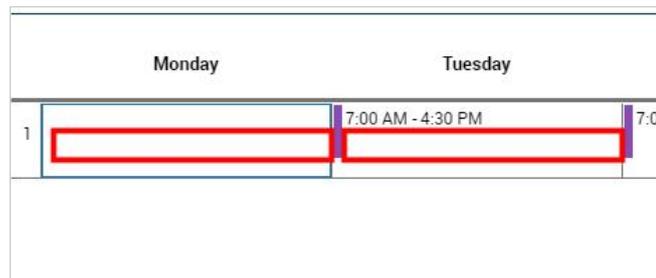
Click on **Pattern Template**



Click on the schedule you want the employee(s) to work for the set time. If you hover over the selections, it will display a longer name. This will apply the template for the entire time you have this schedule set to. Confirm the changes are what you want.



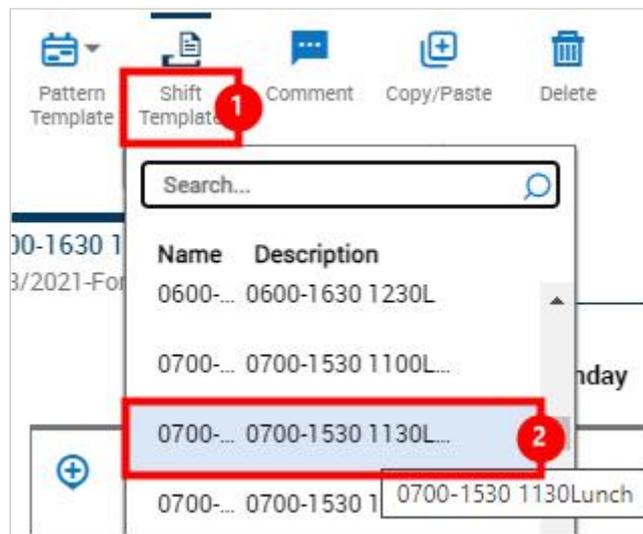
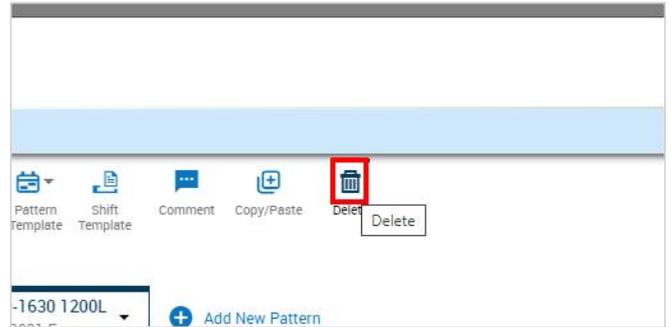
- If you want to mix and match specific schedules into this pattern, select the **Delete** and press Apply.



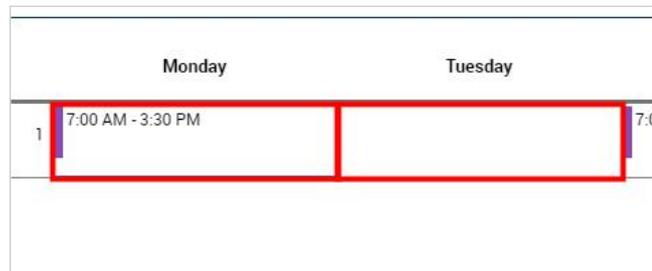
- Select the days on the schedule you want to remove.

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Click on the **Delete** button to toggle the delete function.

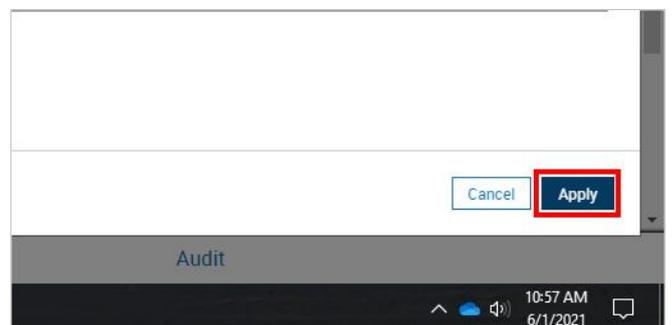


1. Click on **Shift Template**
2. Select the schedule you want to input.



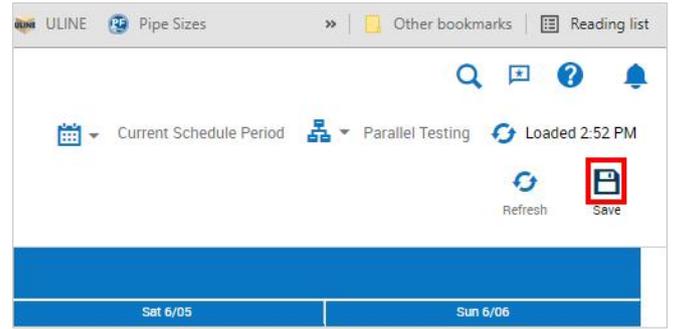
- Select the days you want this shift to be placed on. Confirm the schedule looks like you want.

Click on the button **Apply**



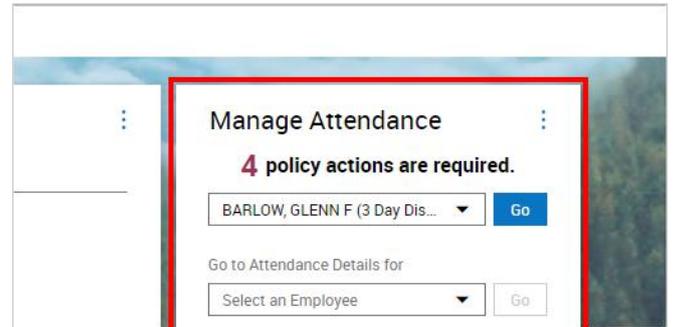
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Click on the button **Save Schedule Content**

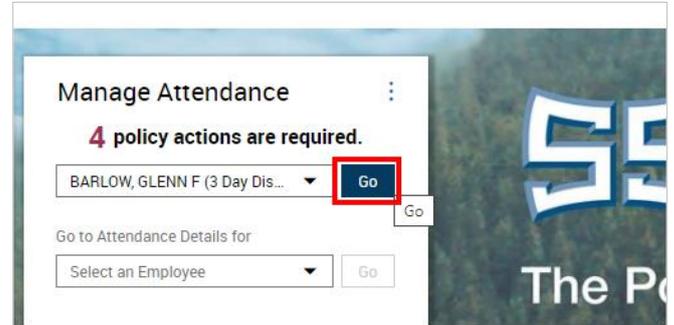


15. Applying Disciplinary Action

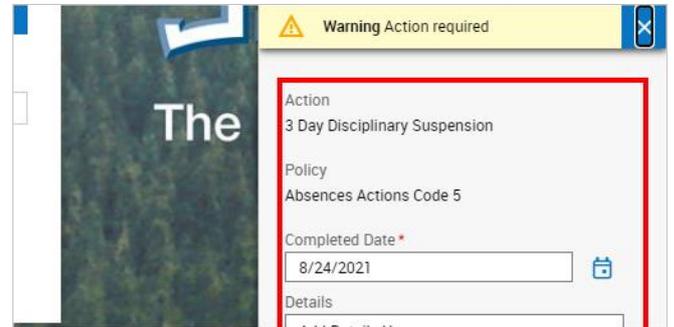
If you have the 'Manage Attendance' tile on your home page, you should be able to see any actions that need to be taken for your employees.



Select the action you want to work with and press **Go**.



The information about the incident will be displayed.



Click on **See Full Attendance Details** at the bottom.



On this form, you will see balances calculated per every day. Navigate to the date that has the action. It have what action that needs to be taken listed on the left. Occurances appear with a grey and white border on the left.

- Absences	7.0	8.0
Day Start Balance: Code 5 - Absences	Balance Amount	7.0
Code 5 - Absences Unexcused	Event Amount	Balance Change
	09:00	1.0
3 Day Disciplinary Suspension	Balance Name	Balance Trigger
	Code 5 - Absences	8.0
Day End Balance: Code 5 - Absences	Balance Amount	8.0

Review the information.

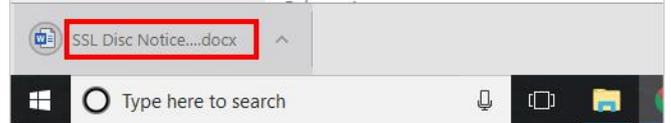
Balance: Code 5 -	Balance Amount	7.0
- Absences used	Event Amount	Balance Change
	09:00	1.0
Disciplinary Suspension	Balance Name	Balance Trigger Amount
	Code 5 - Absences	8.0
	Policy Name	Absences Actions Code 5
Balance: Code 5 -	Balance Amount	8.0

Select the pencil icon on the far right of the screen.

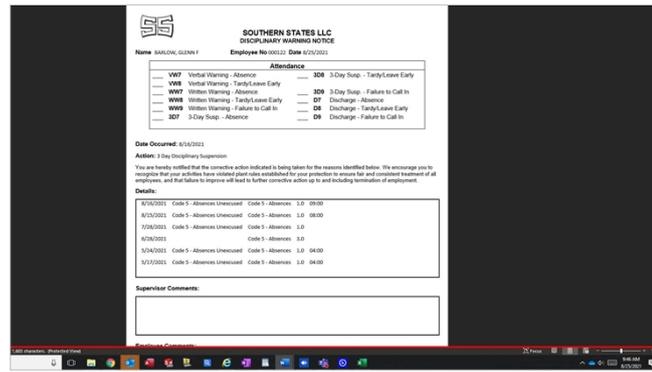
Click on the item **View Document**

This will download the disciplinary form as a Word document. Click on the link once it downloads. If you're in Chrome, it should appear at the bottom of the screen.

Day Start Balance: Code 5 - Absences	Balance Amount	6.0
Code 5 - Absences Unexcused	Event Amount	Balance Change
	08:00	1.0
Written Warning	Balance Name	Balance Trigger
	Code 5 - Absences	7.0

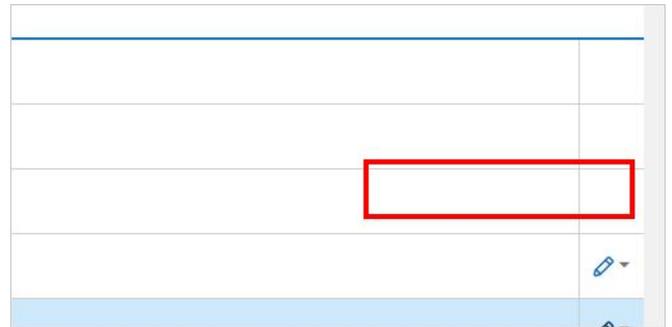
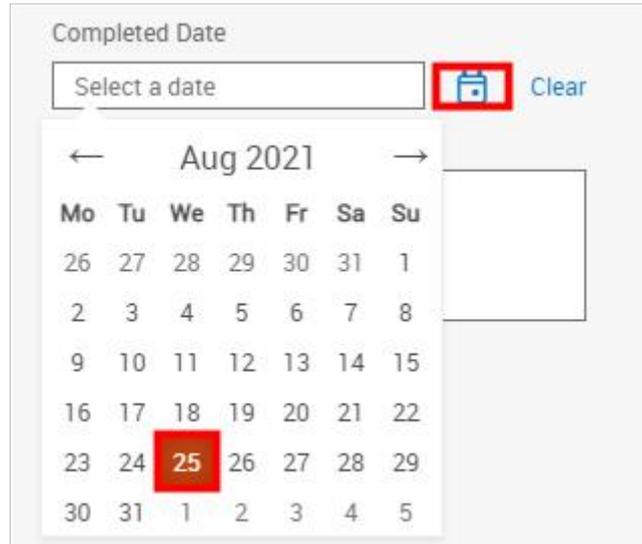


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- Review the disciplinary form. Type any necessary comments. Print the document and follow standard procedures for issuing the disciplinary action.

Return to Workforce Dimensions and click on the pencil again. Click on the pencil and go to **Update Action**.

- Select the date you have issues the disciplinary action.

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Click on the details box and enter text to describe what action was taken.

Click on the button **Save**

Click the drop down arrow on the occurrence on the far left.

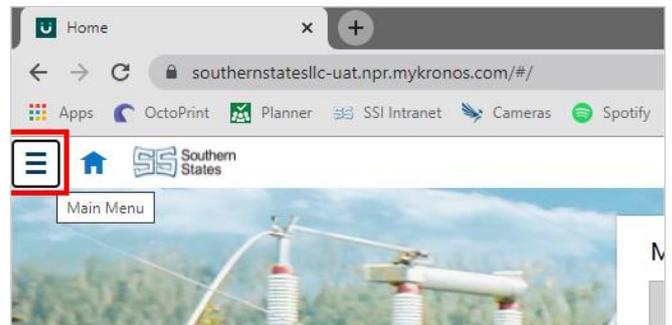
Absences		
Day Start Balance: Code 5 - Absences	Balance Amount	7.0
Code 5 - Absences Unexcused	Event Amount	09:00
	Balance Change	1.0
3 Day Disciplinary Suspension	Balance Name	Code 5 - Absences
	Balance Trigger	8.0
Day End Balance: Code 5 - Absences	Balance Amount	8.0
Sun 8/15/2021		

You can now see when the 'Action Completion Date' was, which should be the date you filled in.

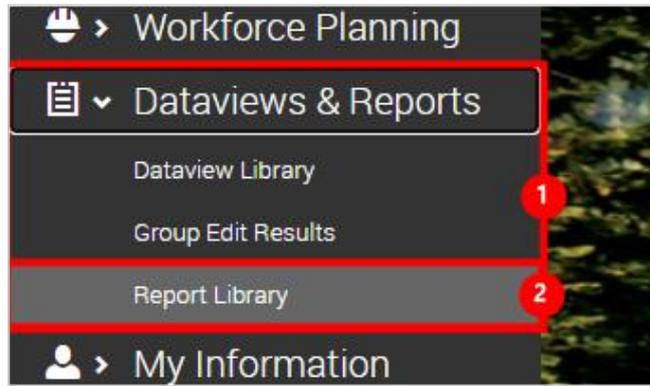
Absences		
Day Start Balance: Code 5 - Absences	Balance Amount	7.0
Code 5 - Absences Unexcused	Event Amount	09:00
	Balance Change	1.0
3 Day Disciplinary Suspension	Balance Name	Code 5 - Absences
	Balance Trigger Amount	8.0
	Policy Name	Absences Actions Code 5
	Action Completion Date	8/25/2021
Day End Balance: Code 5 - Absences	Balance Amount	8.0

16. Absence Report

Click on the button **Main Menu**

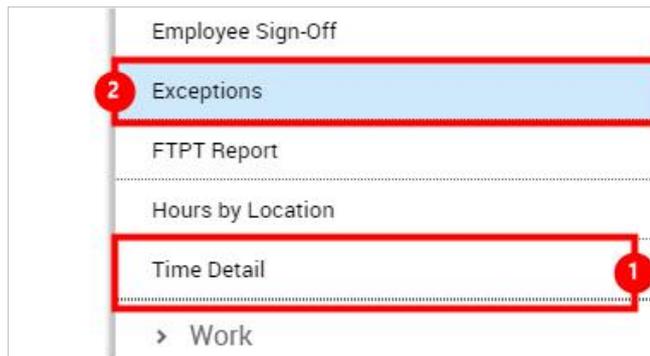
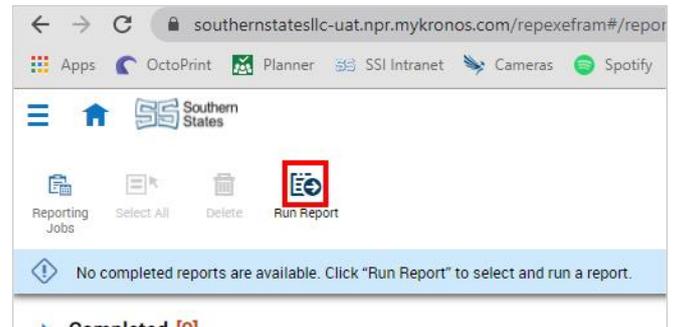


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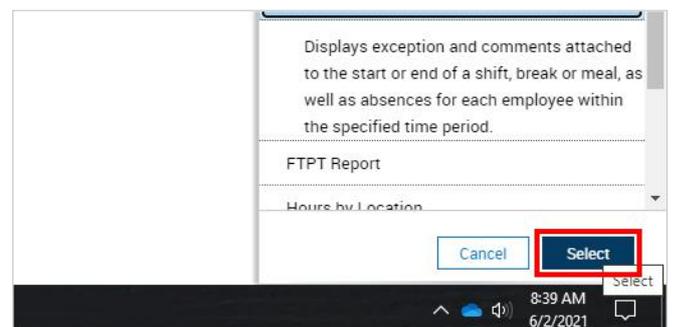
1. Click on the item **Dataviews & Reports** **Dataview Library** **Group Edit Results** **Report Library**
2. Click on the link **Report Library**

Click on the button **Run Report**

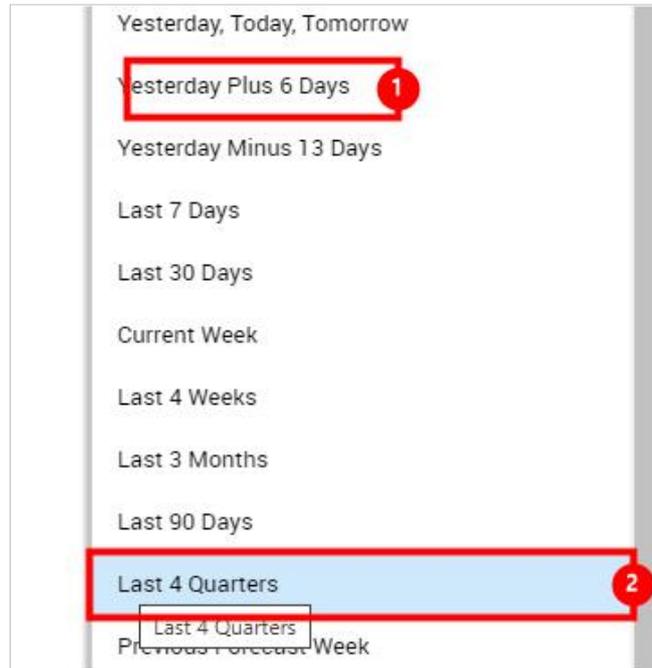


1. Click on the button **Timekeeping**
2. Click on the button **Exceptions**

Click on the button **Select**

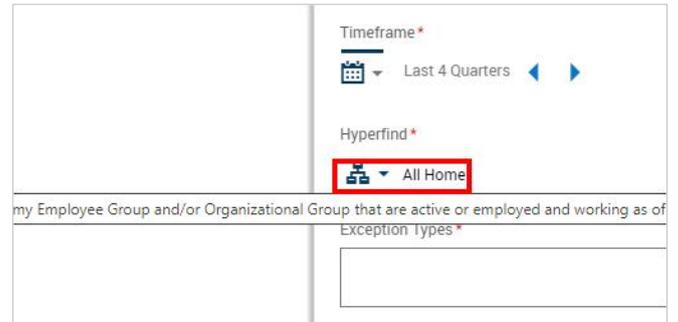


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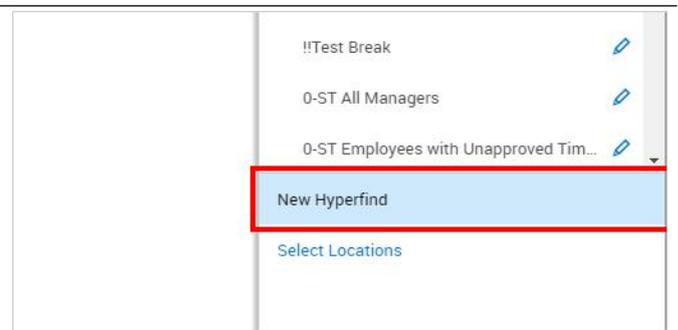


1. Click on the timeframe.
2. Select the timeframe you want to see.

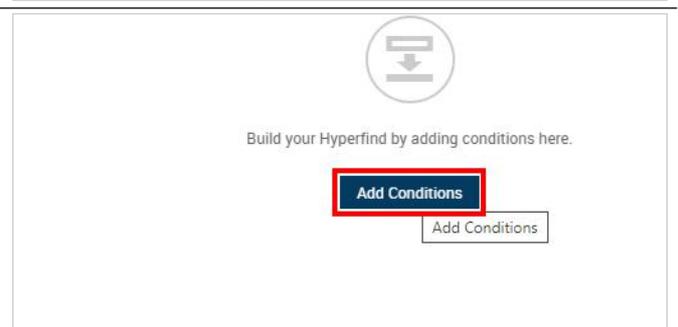
Select the Hyperfind dropdown to select the employees you want to see.



If the people you don't see aren't already listed, click on **New Hyperfind**.

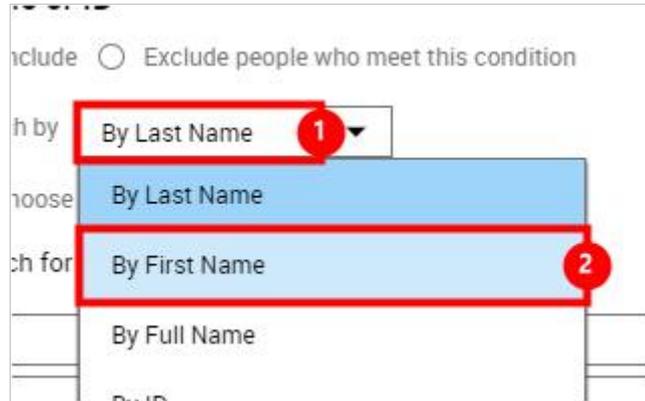
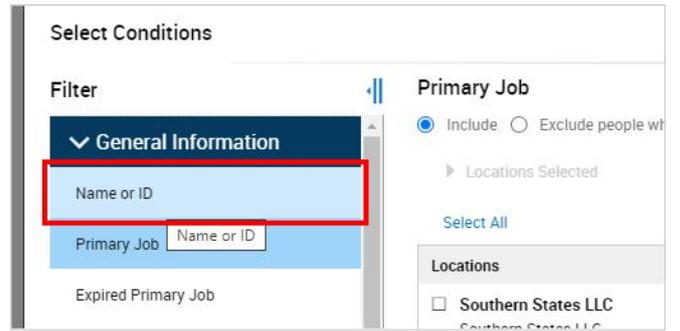


Click on the button **Add Conditions**

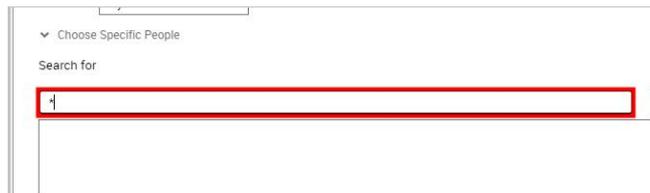


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Select the information you want to filter the data by. You can use name, employe number, department, or more.

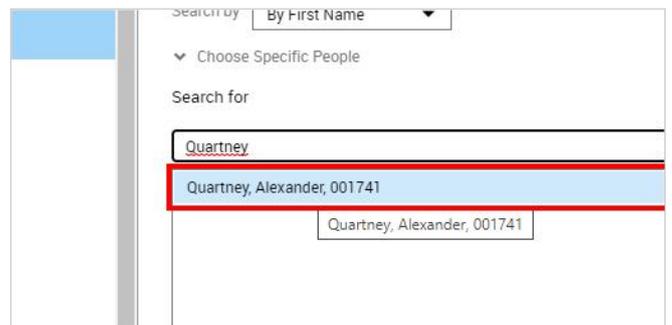


1. Select the Search By dropdown.
2. In this case, we are searching **By First Name**.



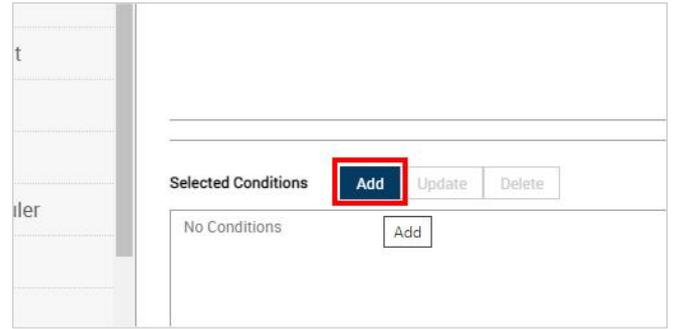
1. Enter the information you want to search.

We searched for Quartney, so we click her name to select her.

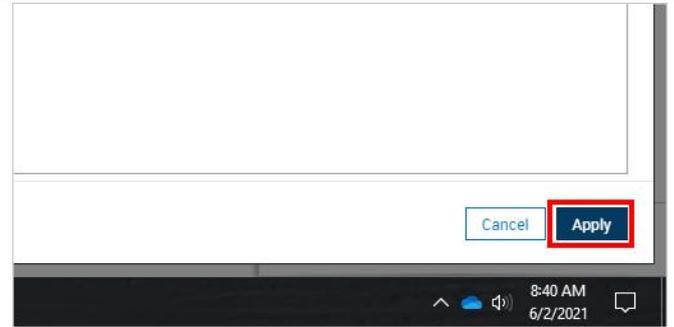


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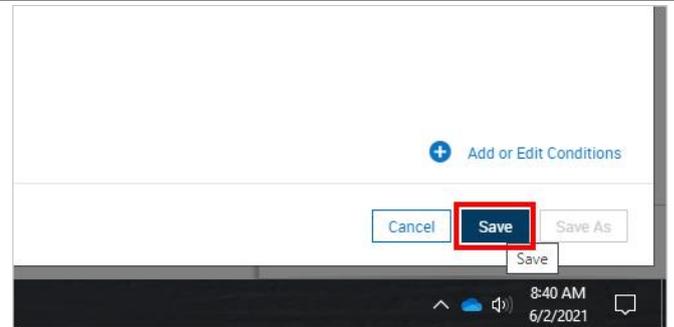
Click on the button **Add**



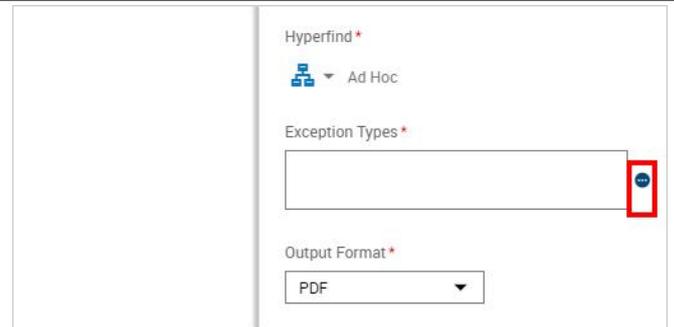
Click on the button **Apply**



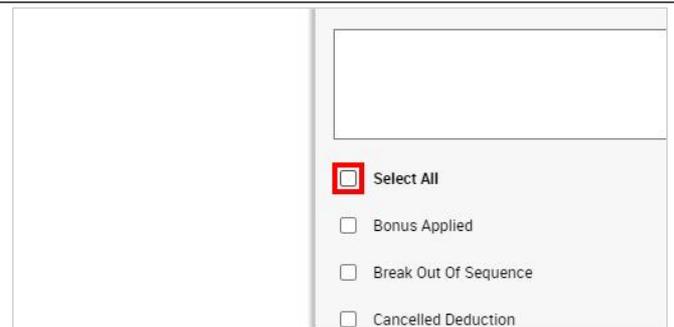
Click on the button **Save**



Click on the ellipse next to the exception box to see a list of exceptions that can be displayed.

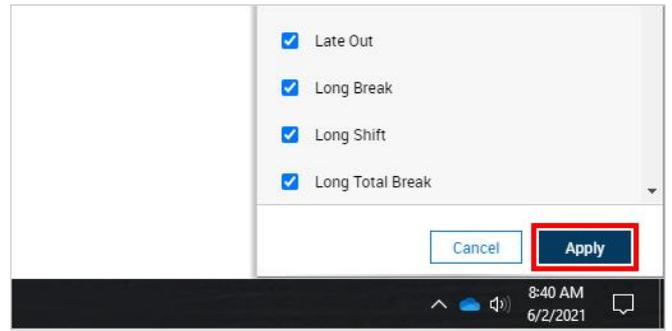


In this case, we select all exceptions.

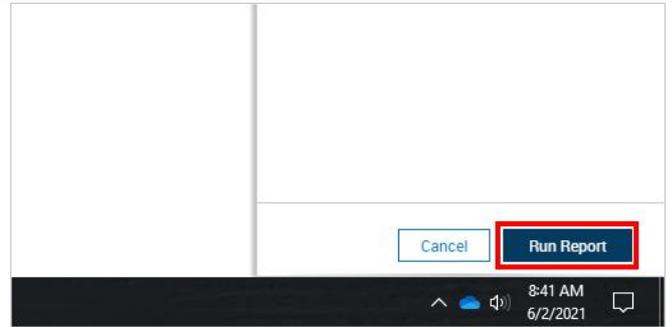


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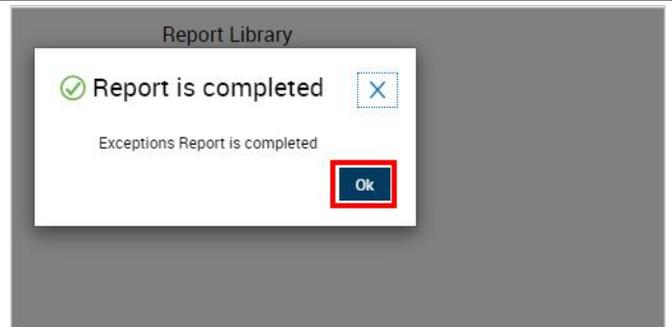
Click on the button **Apply**



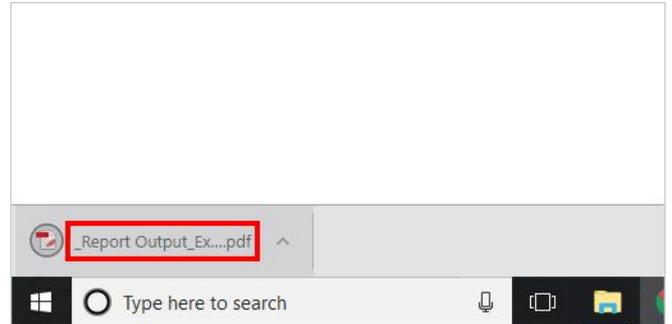
Click on the button **Run Report**



When the report is complete, you will receive a prompt. Press **Ok**.



As long as the report's file type was a .pdf, it will download automatically. Open the report and review the information.



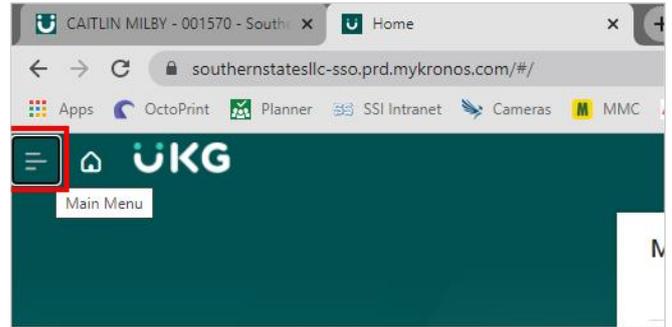
Review the report.

Employee Name (ID)	Exception	Exception Day	Exception Date	Act D
Alexander, Quartney (001741)				
Break Out Of Sequence				
		Thu	Jan 14, 2021	Jan
		Fri	Feb 19, 2021	
		Sun	Mar 7, 2021	Mar
		Mon	Mar 22, 2021	Mar 2
Total		4		
Early In				
		Wed	Jan 27, 2021	Jan
		Thu	Jan 28, 2021	Jan
		Fri	Jan 29, 2021	Jan

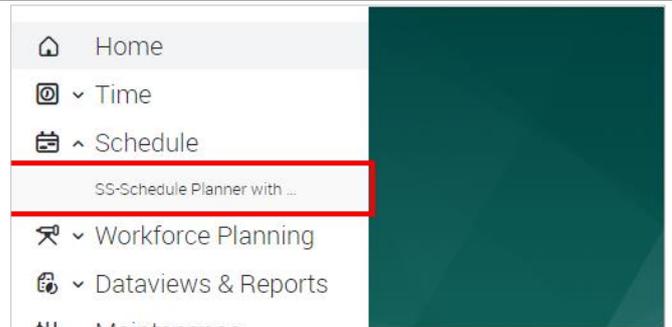
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17. Weekly Time Review and Approval

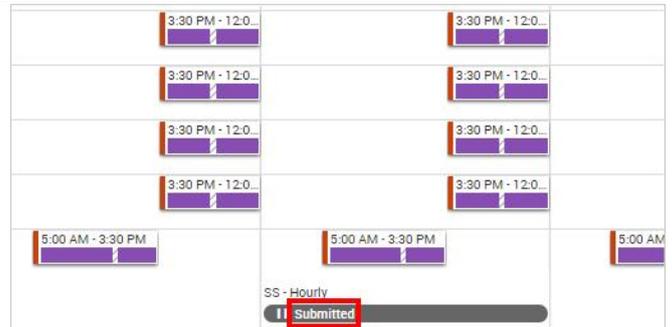
Click on the button **Main Menu**



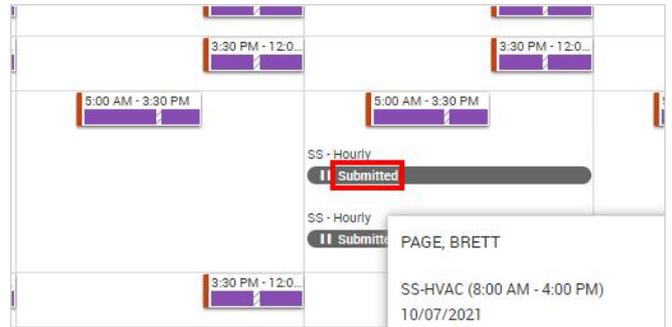
Under the Schedule tab, open the Schedule Planner with Absence Calendar.



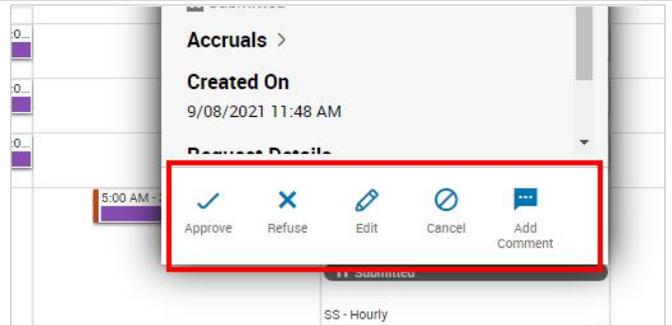
Review the schedule for any time-off requests. They will show up as grey boxes saying "Submitted."



Right click on the grey box.

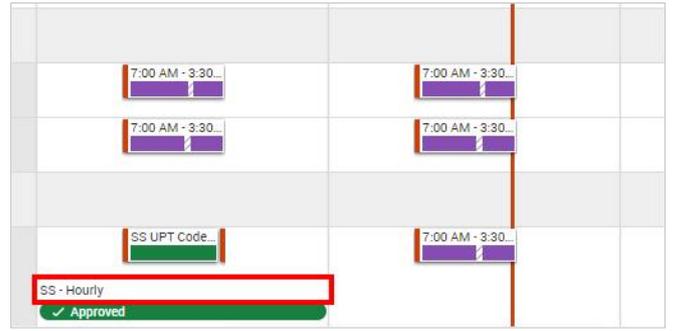


Select the correct response for the request. If you accept it, it will excuse their shift and apply the time off to the shift. You can also edit from here if you want to change the amount of time or paycode type the employee has requested.

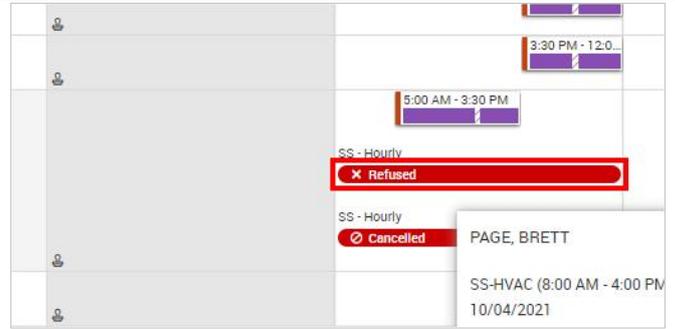


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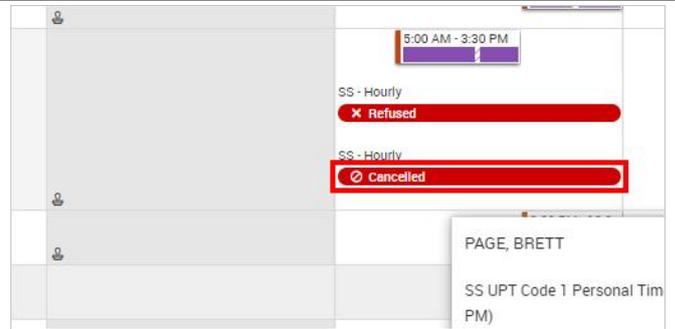
If you approve the time-off request, it will reflect in the system with a green bar and checkmark saying 'Approved.'



If you decide to refuse the request, the schedule will stay the same. You will get a red X and a 'Refused' comment on the request.



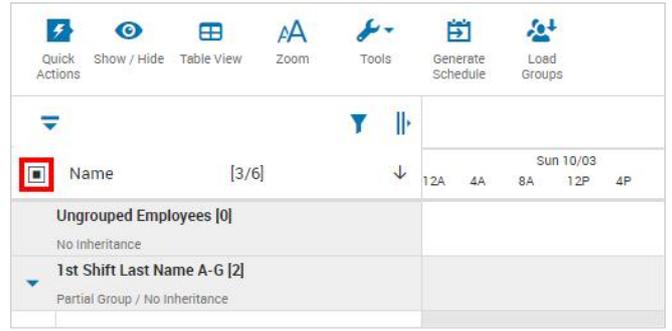
If you approve time, and then need to cancel, you can right click the green 'Approved' status and select cancel. It will then turn red with a crossed circle saying 'Canceled.'



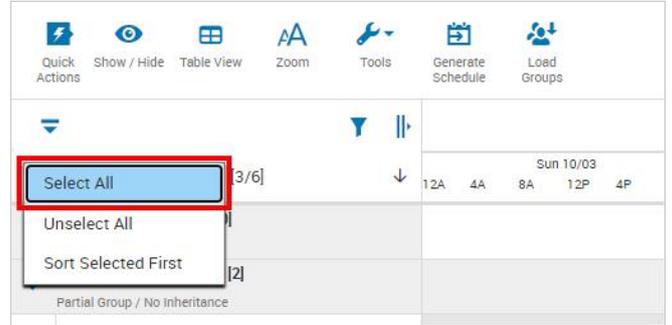
Partial Group / No inheritance	
<input checked="" type="checkbox"/>	EDWARDS, VICKIE
<input checked="" type="checkbox"/>	GARNER, KIMBERLY B
1st Shift Last Name H-M [1]	
Partial Group / No Inheritance	
<input type="checkbox"/>	JACKSON, STEWART

- Next, select the employees you want to approve timecards for. You can do this by selection each employee checkbox.

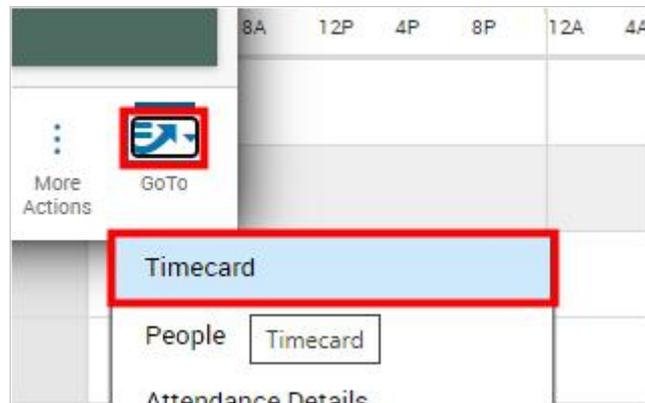
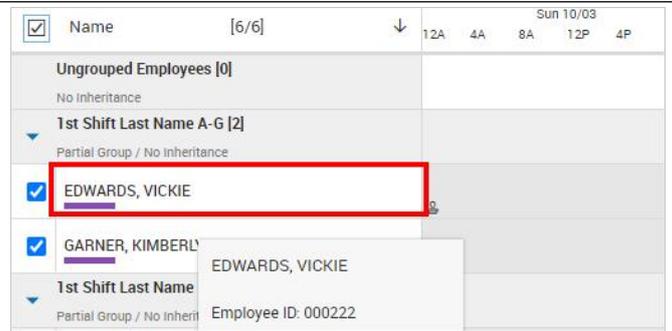
If you rather select all employees at once instead of specific employees, select the black box in the top left of the employee list.



Click on the button **Select All**



Right click on one of the selected employees.



- Click on the button **GoTo**
- Click on the button **Timecard**

In	Out	Transfer	In	Out
6:57 AM	12:20 PM		12:48 PM	3:30 PM
6:56 AM	12:20 PM		12:49 PM	3:30 PM

- Review all time on the timecard and make sure that it is correct in the system.

If an employee was absent and needs a code 5, or was tardy and needs to have a code 0, right click the flag.

Date	Schedule	Absence	In
10/04	7:00 AM - 3:30 PM		6:54 AM
10/05	7:00 AM - 3:30 PM	i	
10/06	7:00 AM - 3:30 PM		
10/07	7:00 AM - 3:30 PM		

Click on **Comments**

Date	Schedule	Absence	In
Mon 10/04	7:00 AM - 3:30 PM		
Tue 10/05	7:00 AM - 3:30 PM	i	
Wed 10/06	7:00 AM - 3:30 PM		
Thu 10/07	7:00 AM - 3:30 PM		

Select a Comment ▼

Search

Attendance Maintenance Adjustment

Code 5

Excused

- Apply the correct code. Please note that when an employee has a flag on their timecard, it does not mean that a code was automatically applied. You must add a comment and apply one of these codes to have their absence or tardy count towards them.

Enter a comment.

Code	Amount

Comment On: Unexcused Absence

Add Comment

Code 5 ▼

Type a note (optional).

Add Another Note Add

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Click on the button **Add**

Code	Amount

Add Comment

Code 5

Type a note (optional).

Add Another Note

Add

Click on the button **Apply**

Cancel **Apply**

3:40 PM
10/5/2021

You will now see the comment has been added to the punch or absence.

Date	Schedule	Absence	In
10/04	7:00 AM - 3:30 PM		6:54 AM
10/05	7:00 AM - 3:30 PM	📱	
10/06	7:00 AM - 3:30 PM		
10/07	7:00 AM - 3:30 PM		

If you see any employees with a red bar that should not have a red bar, such as returning from lunch early, please correct this. In this scenario, the employee has clocked back in early from lunch. Right click on the red flag.

Transfer	In	Out	T
	📱 12:48 PM	📱 3:30 PM	
	🚩 12:49 PM	📱 3:30 PM	

Click on **Mark as Reviewed**. This shows that this punch is acceptable and has been reviewed. Only do this if the punch should be excused.

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Edit Made By: SUPERUSER

Mark as Reviewed Edit Comments

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If an entire box is red, as seen here, it means the employee did not clock out. Payroll's Sign-Off will not process properly if these punches exist. Please enter the correct time that the employee left for the day to rectify this.

Transfer	In	Out	Transfer	Pa
	12:47 PM	3:30 PM		

Lastly, check that the totals for the week are calculating properly. This is an important step.

Totals	

Make sure **All** is selected on the dropdown menu in the top left.

+	+	Sat 10/09		
+	+	Sun 10/10		

Daily All Totals Details For Tue 10/05

All	Job
Daily	Machine Operator 6
Period to Date	
Time Item	

Location	Job	Cost Center	Labor Category	Pay Code	Amount
Southern States LLC/Southern States LLC-PL	Admin, Salaried S		MANUF_	REGOT	0.00
Southern States LLC/Southern States LLC-PL	Admin, Salaried S		MANUF_	REGARD	40.00

- Review the totals for the weekly summary and confirm everything looks correct. If anything looks off, you can pinpoint the day that is causing issues using the 'Daily' totals view.

If you want to look at the daily view, select the dropdown menu from earlier and select 'Daily.' Click on the specific days in the schedule, and the totals tab will adjust to show you that specific day's totals.

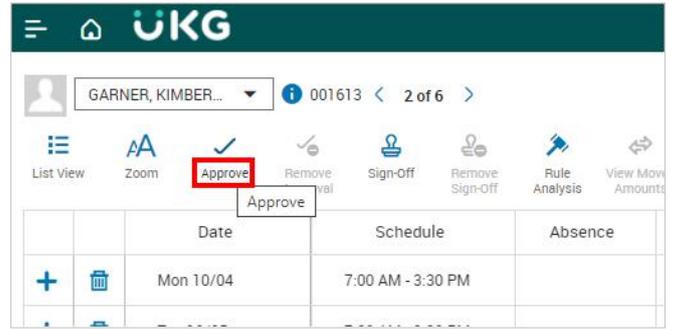
+	+	Sat 10/09		
+	+	Sun 10/10		

Daily All Totals Details For Tue 10/05

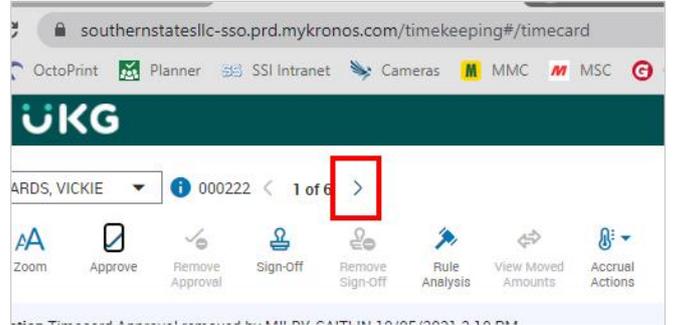
All	Job
Daily	Machine Operator 6
Period to Date	
Time Item	

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Once everything looks correct, select the 'Approve' in the top left of the screen.

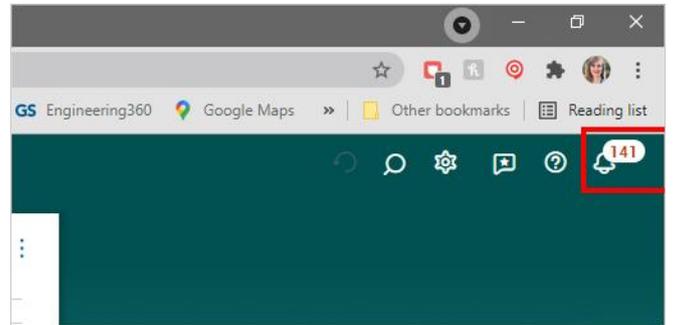


Click on the **Next Employee** button and continue these steps through all employees.

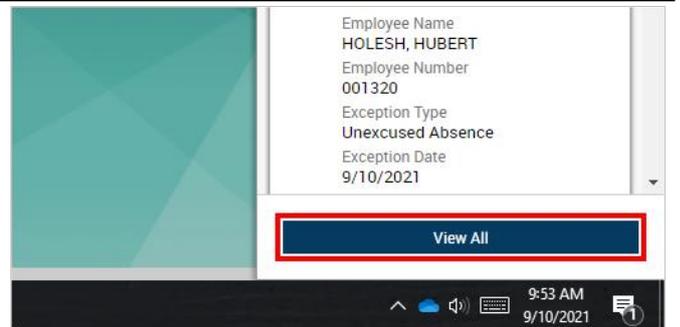


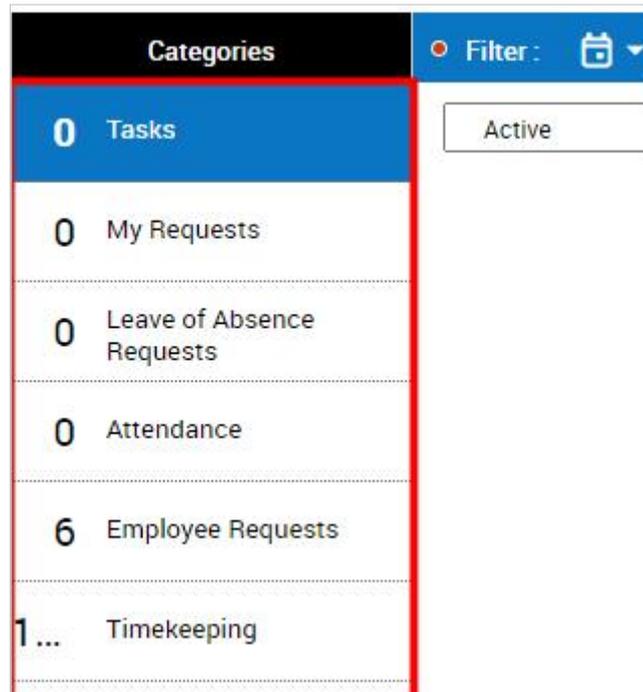
18. Approving Time Off Requests - Notification Center

Click on the Notifications icon in the top right.



Click on the **View All** button at the bottom.





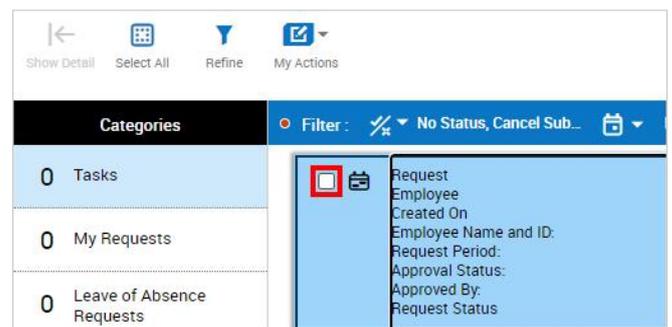
- Your notifications are separated into categories on the left hand column.

Select Employee Requests to see pending time off requests from employees.



- Review the time off request data. You should see employee name, the date they made the request, the type of time off they have selected, and the timeframe that they have requested off.

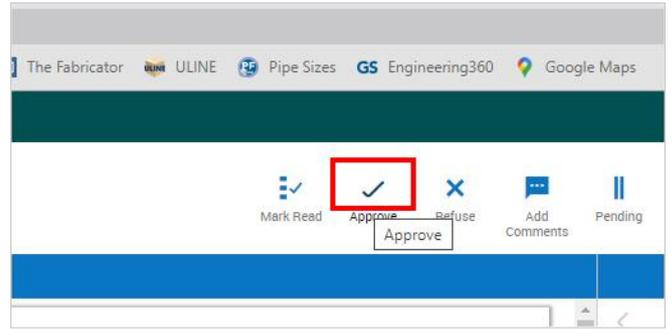
Select the checkbox next to the employee request. You can only approve one request at a time.



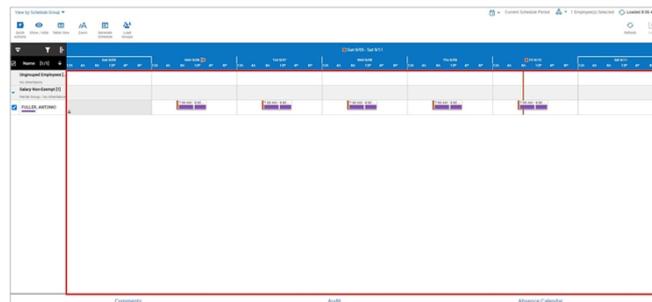
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Select the 'Approve' button in the top right if you want to approve the request. Otherwise, select 'Refuse'.

You should get a confirmation message at the top of the screen. If the employee does not have a balance to pull from, you will get an error message.

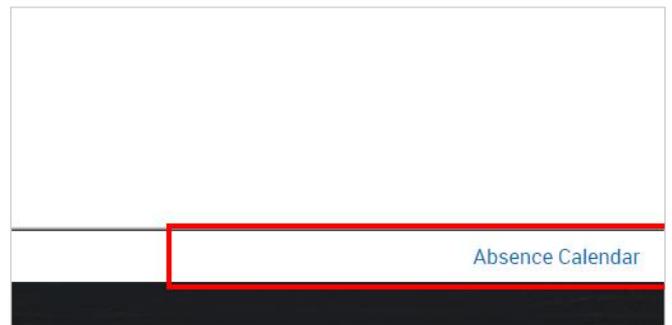


19. Approving Time Off Requests - Superuser



- Navigate to the Schedule Planner with Absence Calendar.

At the bottom of the screen, click on the tab 'Absence Calendar.'

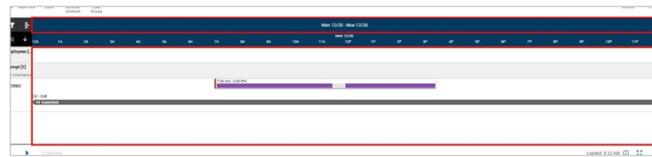


- You will now see a calendar view including this month and two months out.
- If you want to see the next three months, click the Next button in the top left of the tab.

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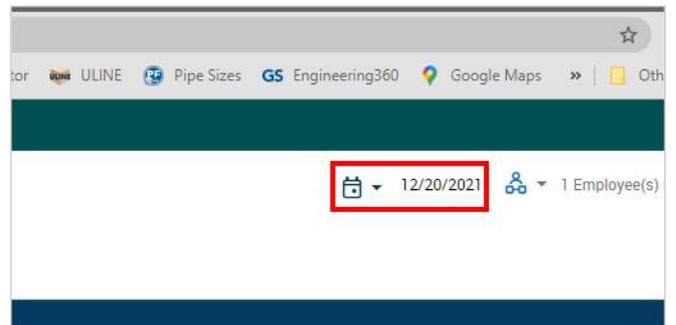


- On the calendar, any time off requests will show up as a black dot on the date. You can click on these dots to navigate to that specific day.



- You can see the selected timeframe at the top of the schedule.
- You will see the schedule and time off request for this day listed below.

If you have an employee(s) that have multiple days off in a week, you can select that date range to see more dates listed at a time. Select the Calendar button in the top right.



Select the **Select Range** button.

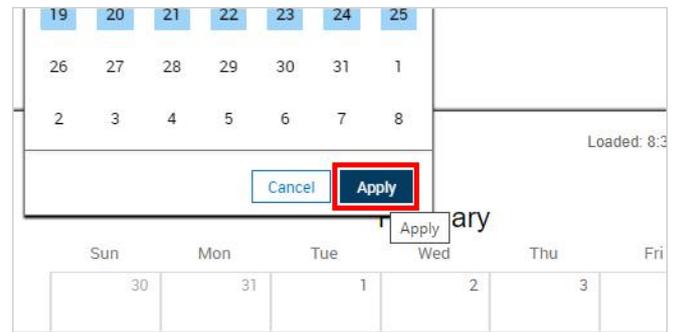


Southern States, LLC	CMilby
	October 15, 2021
Workforce Dimensions	103/116

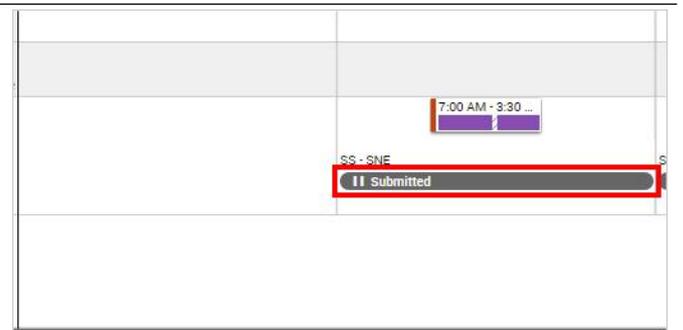


- Using the absence calendar at the bottom of the screen, we see this employee has three days they're taking off for the week of December 20th. We select this time frame to be able to see all days at once.

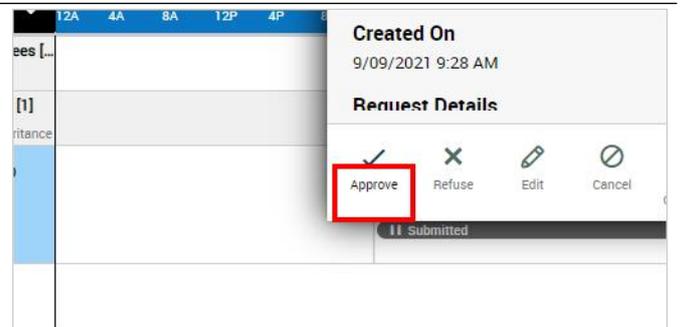
Click on the button **Apply**



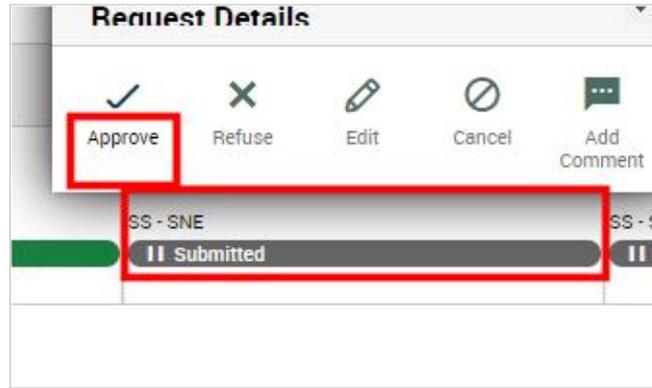
To approve the time off requests, right click on the grey bar that says 'Submitted.'



Click on **Approve**

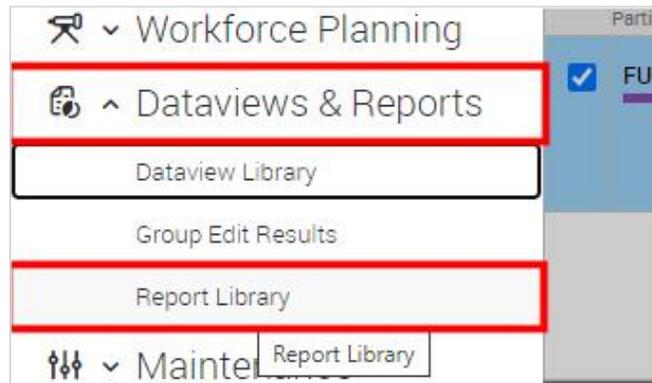
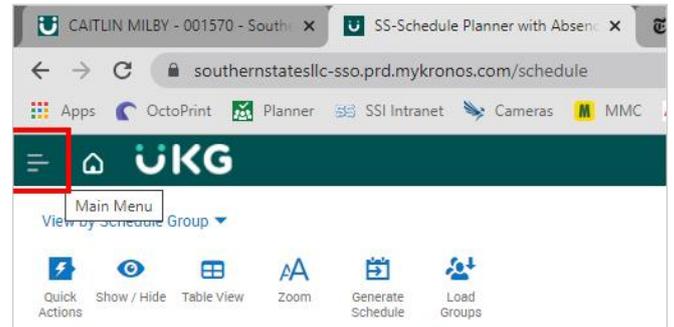


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Workforce Dimensions	104/116



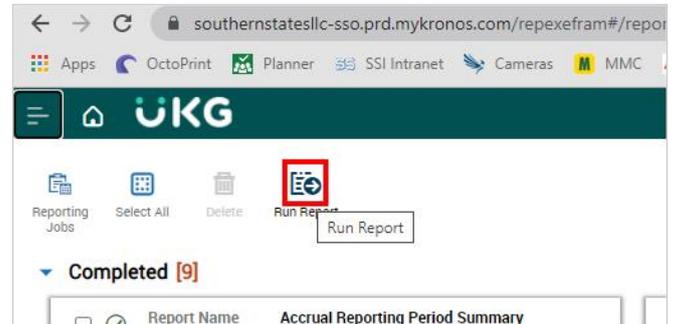
- Do this to as many requests that you want to approve. If an employee does not have enough balance to cover their request, you will get an error on approval.

To check the accrual balance for multiple employees, we can run a quick report. Select **Main Menu** in the top left.



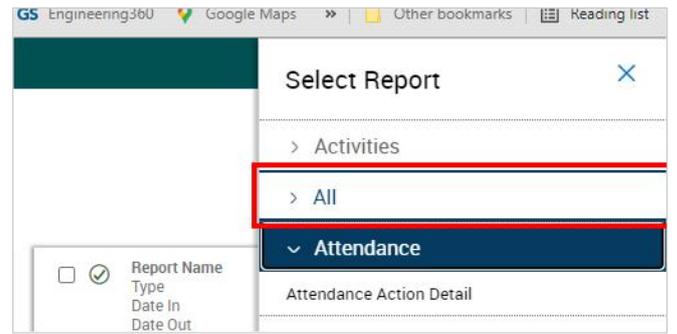
- Click on the Dataviews & Reports tab.
- Click on the link **Report Library**

Click on the button **Run Report**



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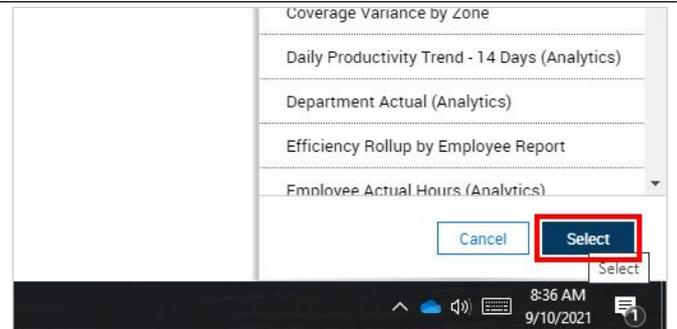
Click on the button **All**



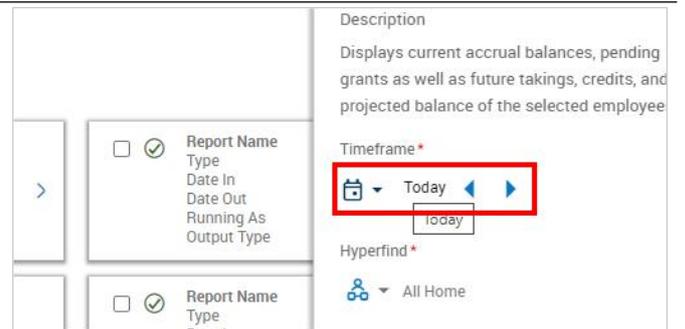
Click on the button **Accrual Reporting Period Summary**



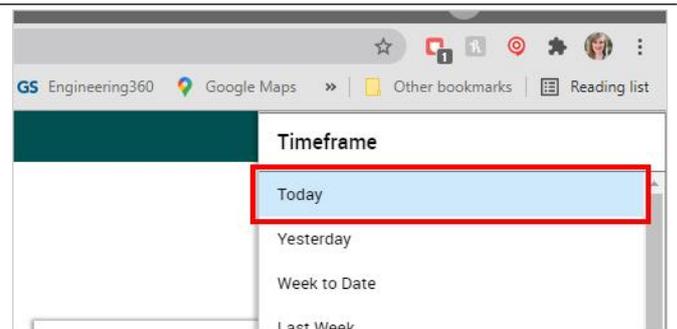
Click on the button **Select**



Click on **Today**

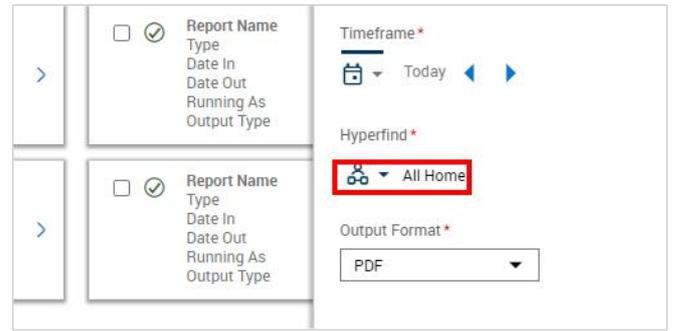


Click on the item **Today**

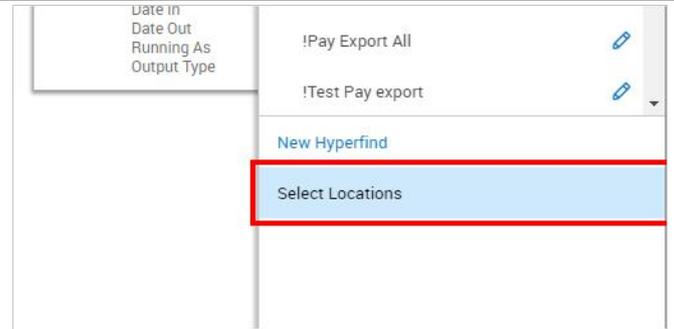


Southern States, LLC	CMilby
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Workforce Dimensions	106/116

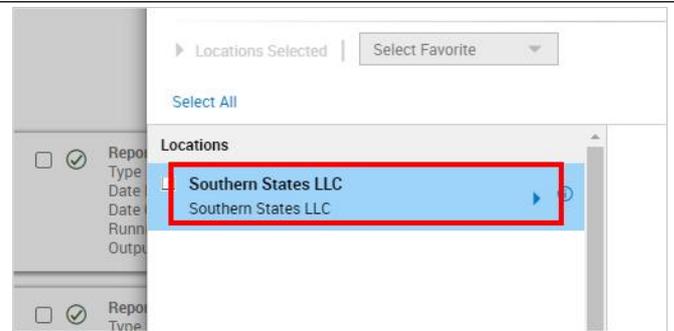
Select the Hyperfind button.



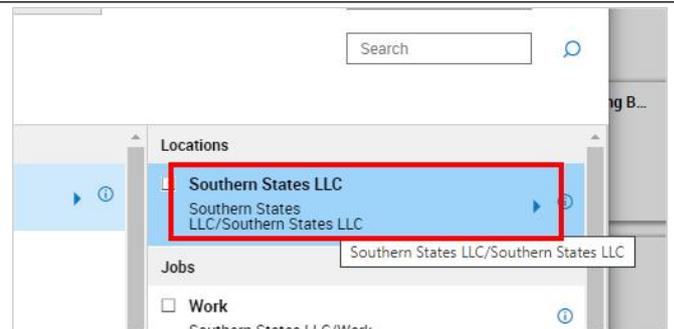
Click on the link **Select Locations**



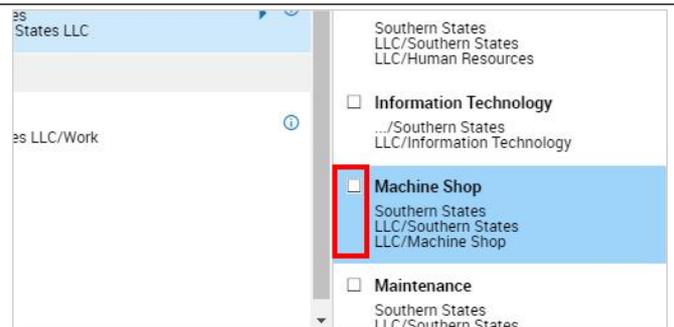
Navigate to the department you want to look at. Select Southern States LLC.



Select Southern States LLC again.

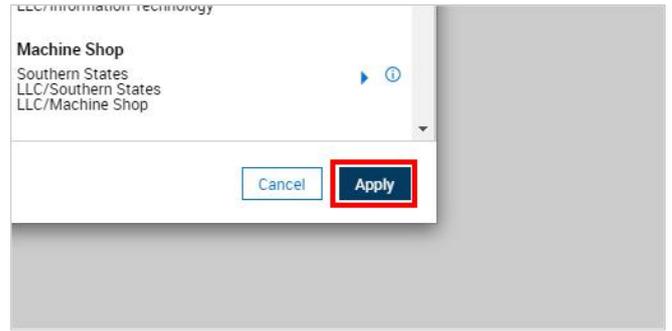


Select the checkbox next to the department(s) that you want to see.

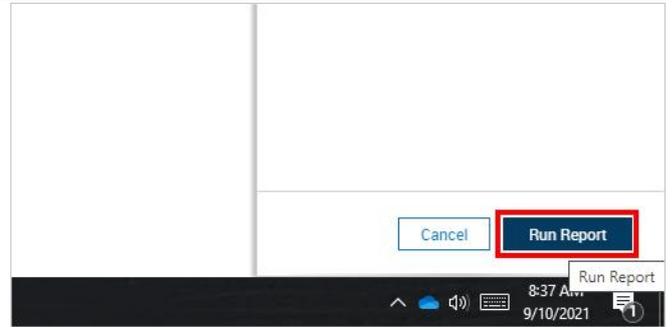


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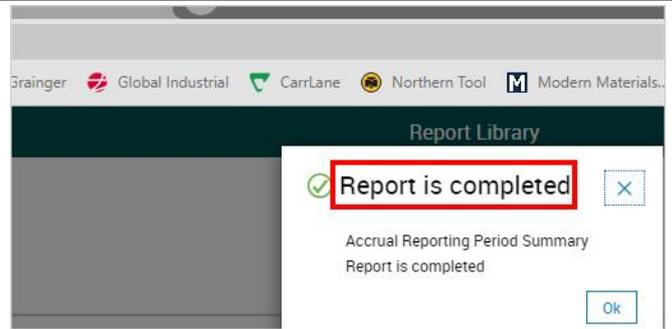
Click on the button **Apply**



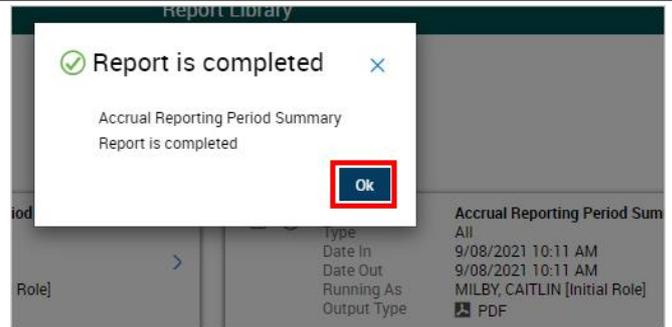
Click on the button **Run Report**



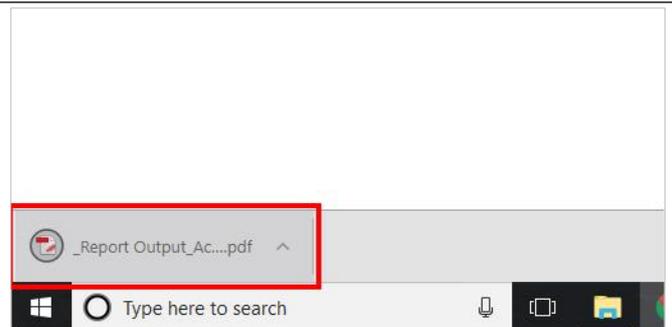
Once the report is completed, you will get a confirmation message.



Select **Ok**. The report will automatically download.

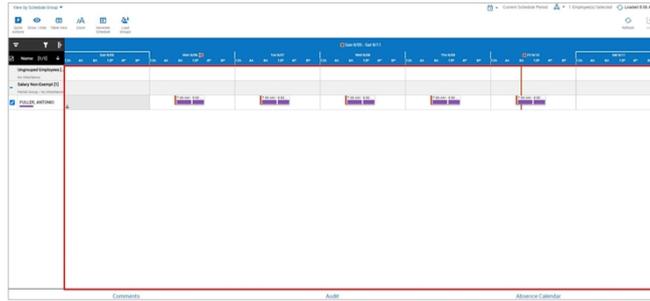


Open the report and make sure all the balances check out properly.



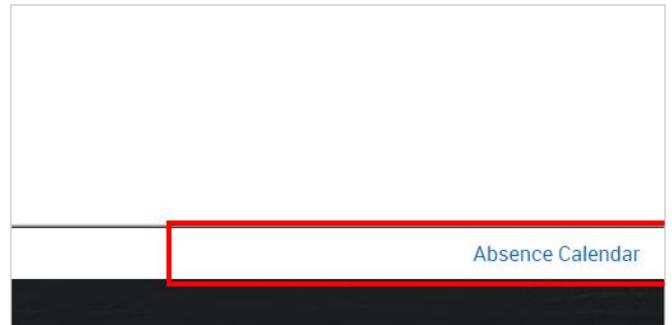
20. Approving Time Off Requests - Superuser

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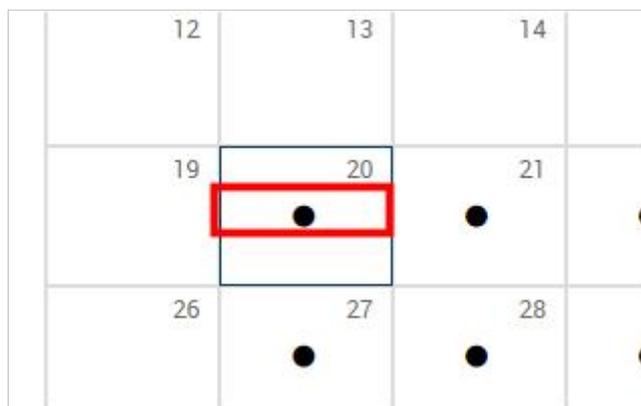


- Navigate to the Schedule Planner with Absence Calendar.

At the bottom of the screen, click on the tab 'Absence Calendar.'



- You will now see a calendar view including this month and two months out.
- If you want to see the next three months, click the Next button in the top left of the tab.



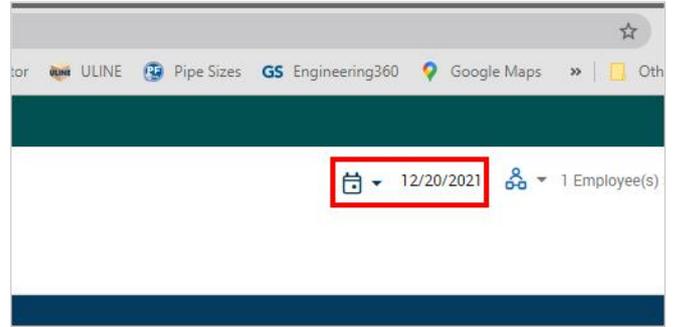
- On the calendar, any time off requests will show up as a black dot on the date. You can click on these dots to navigate to that specific day.

Southern States, LLC	CMilby
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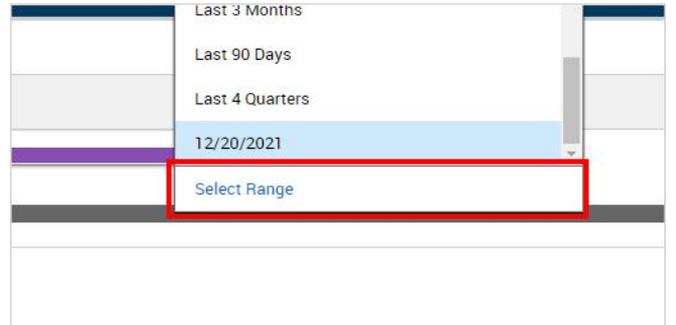


- You can see the selected timeframe at the top of the schedule.
- You will see the schedule and time off request for this day listed below.

If you have an employee(s) that have multiple days off in a week, you can select that date range to see more dates listed at a time. Select the Calendar button in the top right.

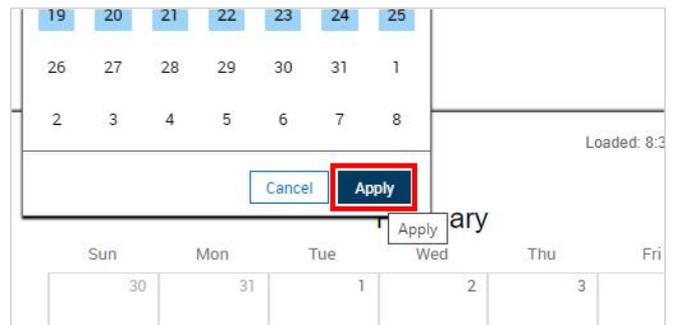


Select the **Select Range** button.

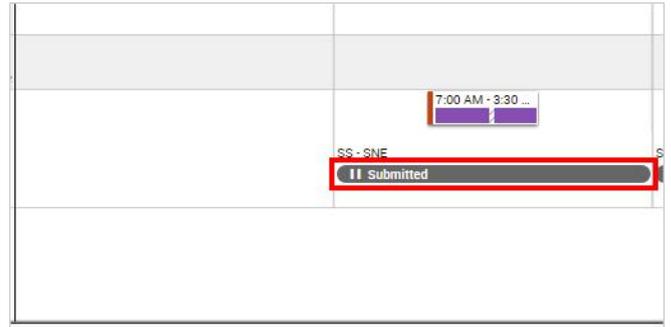


- Using the absence calendar at the bottom of the screen, we see this employee has three days they're taking off for the week of December 20th. We select this time frame to be able to see all days at once.

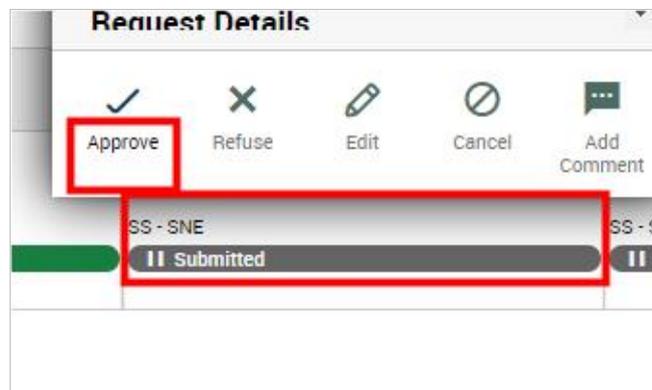
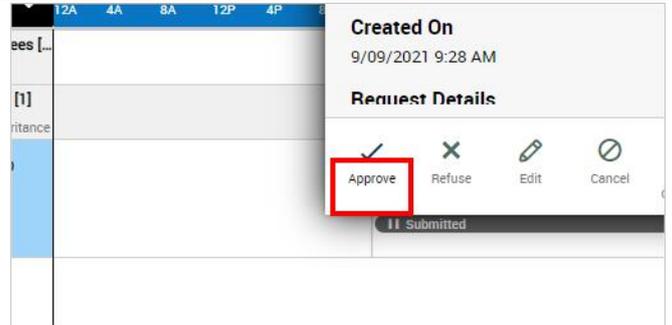
Click on the button **Apply**



To approve the time off requests, right click on the grey bar that says 'Submitted.'

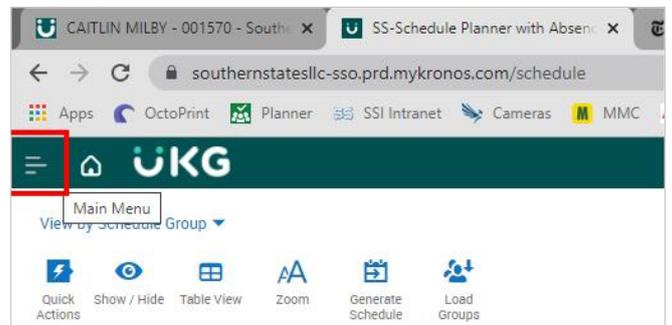


Click on **Approve**

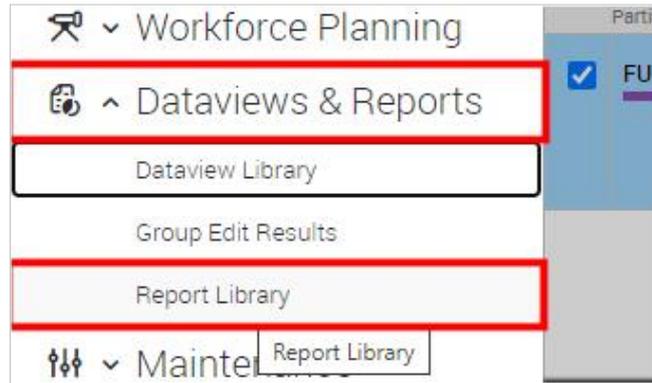


- Do this to as many requests that you want to approve. If an employee does not have enough balance to cover their request, you will get an error on approval.

To check the accrual balance for multiple employees, we can run a quick report. Select **Main Menu** in the top left.

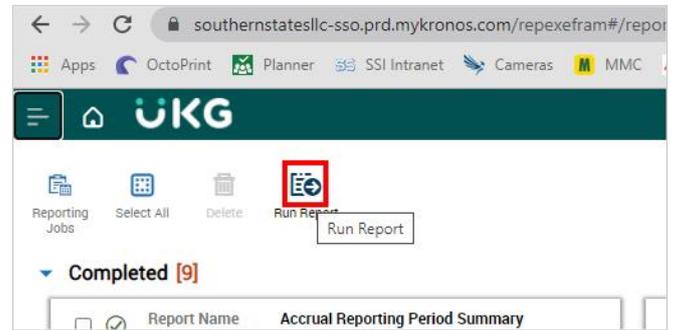


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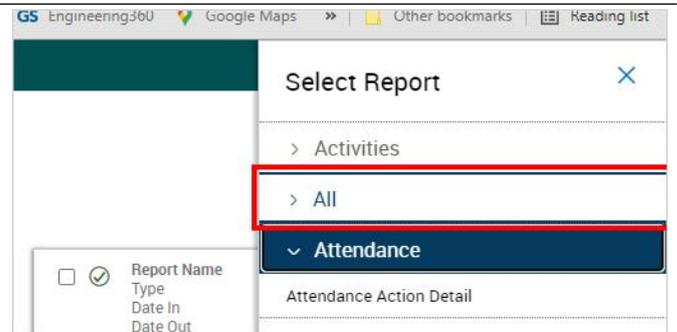


- Click on the Dataviews & Reports tab.
- Click on the link **Report Library**

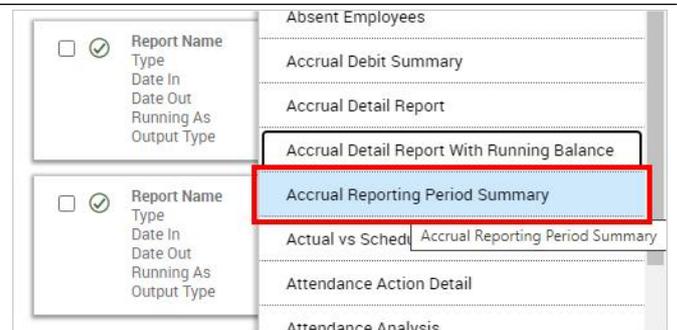
Click on the button **Run Report**



Click on the button **All**

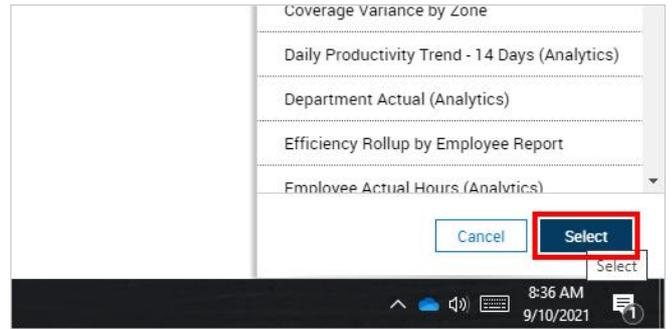


Click on the button **Accrual Reporting Period Summary**



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Click on the button **Select**



Coverage Variance by Zone

Daily Productivity Trend - 14 Days (Analytics)

Department Actual (Analytics)

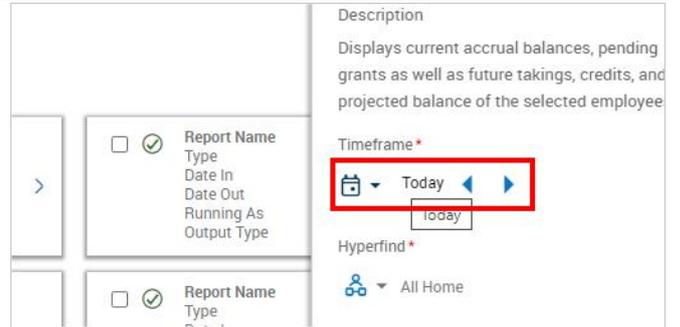
Efficiency Rollup by Employee Report

Employee Actual Hours (Analytics)

Cancel **Select**

8:36 AM
9/10/2021

Click on **Today**



Description

Displays current accrual balances, pending grants as well as future takings, credits, and projected balance of the selected employee

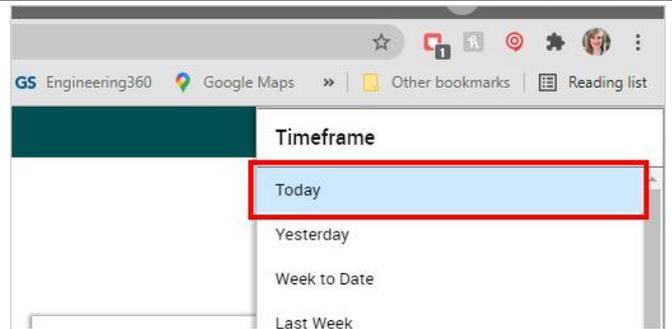
Timeframe *

Today

Hyperfind *

All Home

Click on the item **Today**



GS Engineering360 Google Maps Other bookmarks Reading list

Timeframe

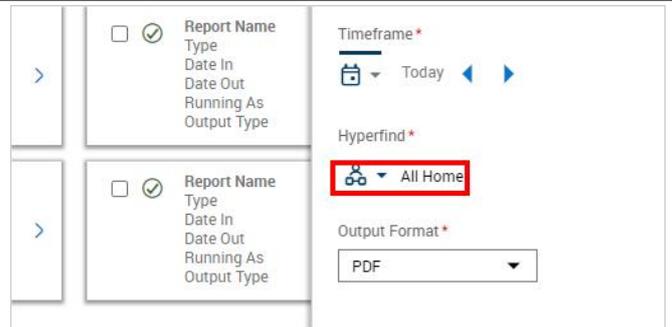
Today

Yesterday

Week to Date

Last Week

Select the Hyperfind button.



Report Name Type Date In Date Out Running As Output Type

Timeframe *

Today

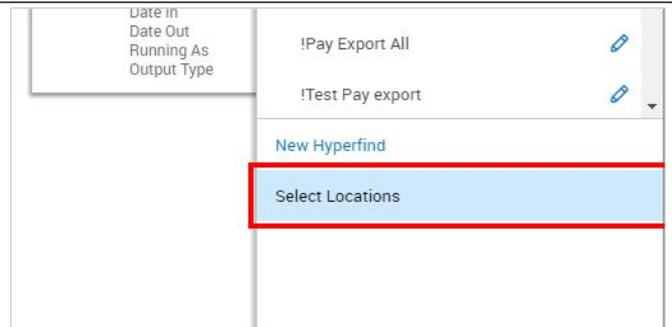
Hyperfind *

All Home

Output Format *

PDF

Click on the link **Select Locations**



Date In Date Out Running As Output Type

!Pay Export All

!Test Pay export

New Hyperfind

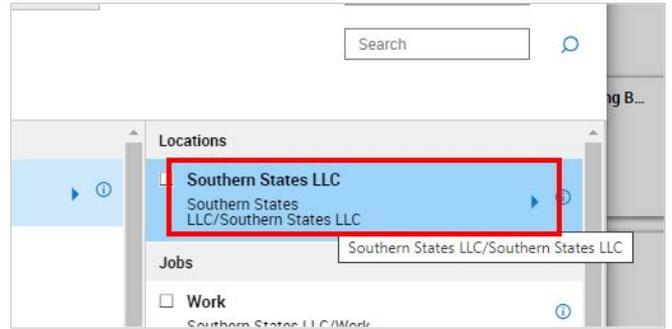
Select Locations

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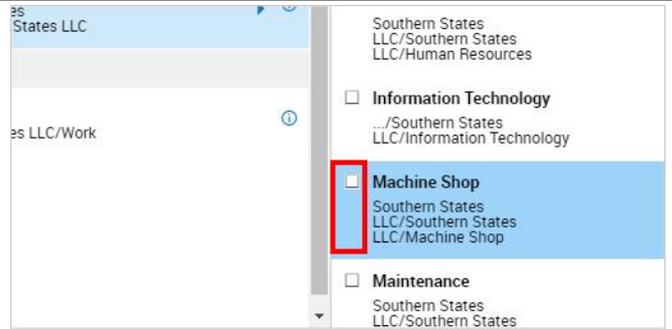
Navigate to the department you want to look at. Select Southern States LLC.



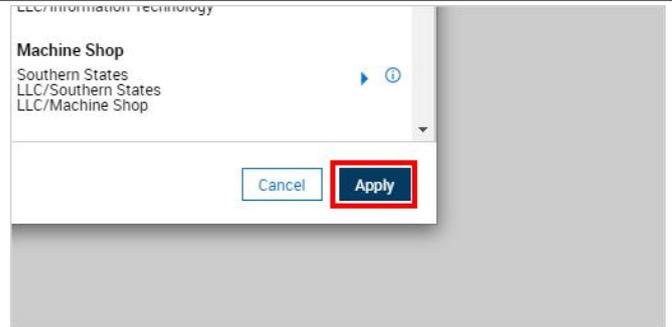
Select Southern States LLC again.



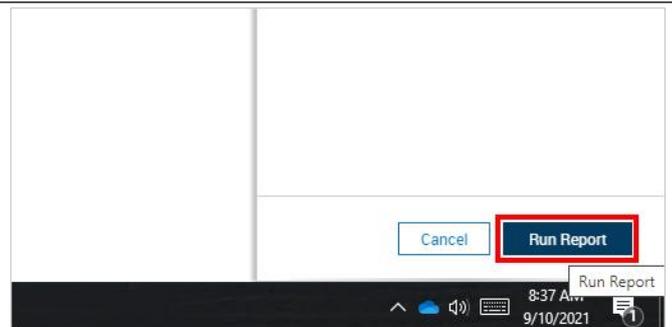
Select the checkbox next to the department(s) that you want to see.



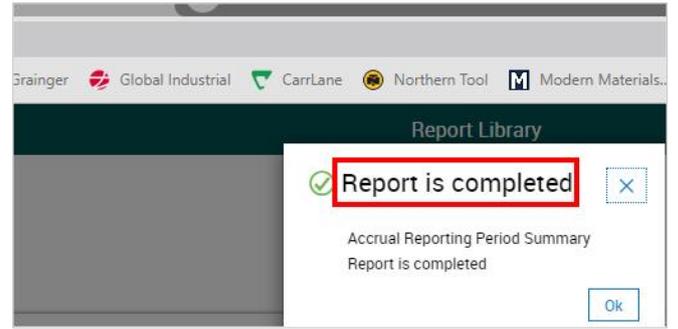
Click on the button **Apply**



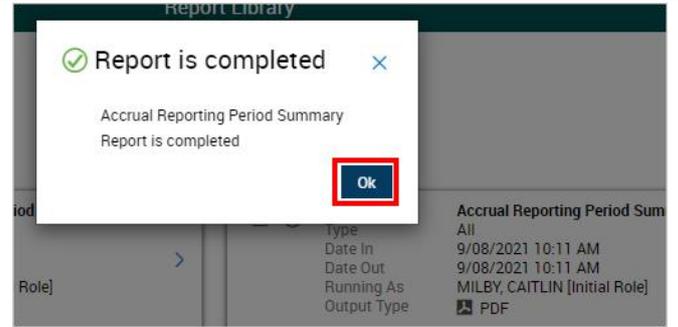
Click on the button **Run Report**



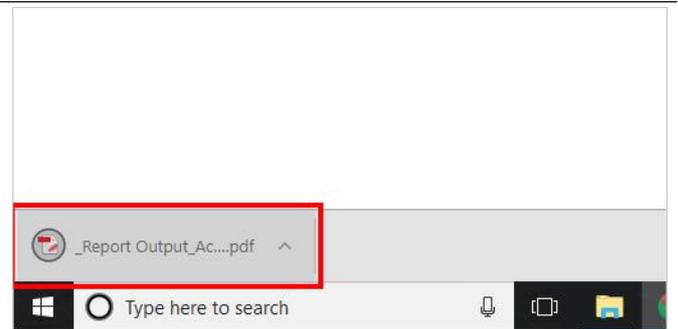
Once the report is completed, you will get a confirmation message.



Select **Ok**. The report will automatically download.



Open the report and make sure all the balances check out properly.



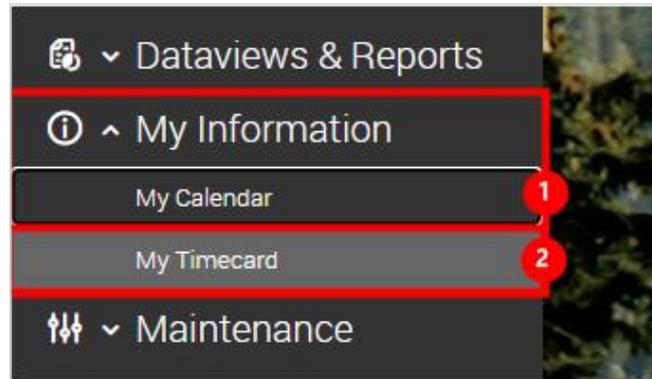
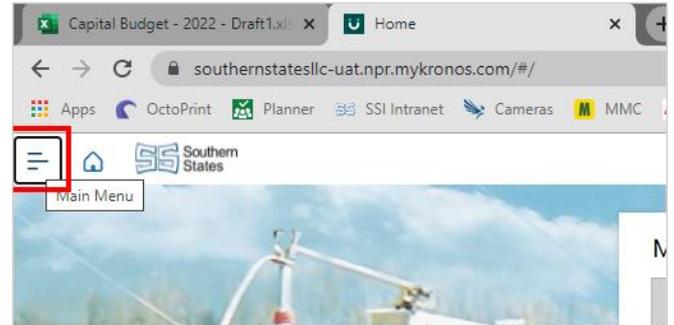
21. Paycode Definitions

Paycode Name	Definition
SS-BD	Birthday
SS-BEREV	Bereavement
SS-BHOL	Bonus Holiday
SS-BUYOUT ONLY BD	Buyout Only - Birthday
SS-BUYOUT ONLY BHOL	Buyout Only - Bonus Holiday
SS-BUYOUT ONLY HVAC	Buyout Only - Hourly Vacation
SS-COVH	Covid Vaccination Holiday
SS-Excused	Excused
SS-HVAC	Hourly Vacation
SS-OST	Off-Site Training
SS-Pending	Pending
SS-SBDY	Salary Birthday
SS-STD	Short Term Disability
SS-Suspension	Suspension
SS-SVAC	Salary Vacation
SS Union Business-U	Union Business
SS UPT Code 1 Personal Time	Unpaid Personal Time Off

- Please see the table for paycode names and their definitions.

22. SNE Recording Time

Click on the button **Main Menu**

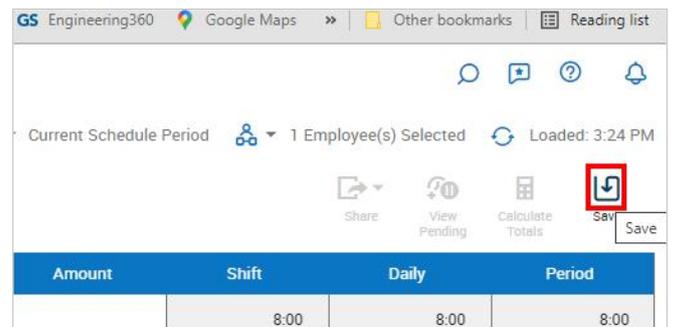


1. Click on the 'My Information' tab.
2. Click on the link **My Timecard**

Day	Start	End	Start	End	Start	End	Transfer	Pay Code	Amount	Start	End	Pay
Mon 10/11	7:00 AM	3:00 PM	7:00 AM	11:00 AM	11:30 AM	3:00 PM			0.00	0.00	0.00	
Tue 10/12	7:00 AM	3:00 PM	7:00 AM	11:00 AM	11:30 AM	3:00 PM			0.00	0.00	0.00	
Wed 10/13	7:00 AM	3:00 PM	7:00 AM	11:00 AM	11:30 AM	3:00 PM			0.00	0.00	0.00	
Thu 10/14	7:00 AM	3:00 PM	7:00 AM	11:00 AM	11:30 AM	3:00 PM			0.00	0.00	0.00	
Fri 10/15	7:00 AM	3:00 PM	7:00 AM	11:00 AM	11:30 AM	3:00 PM			0.00	0.00	0.00	

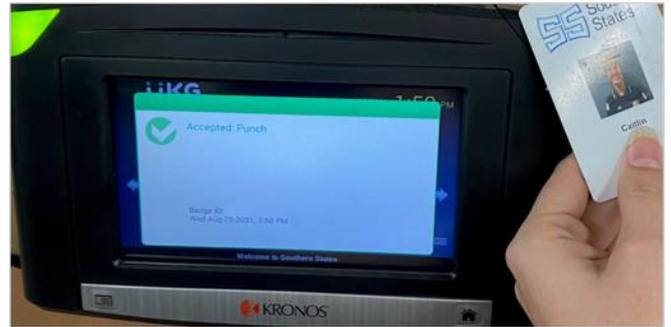
- Input the time that you worked for the day, including a 30 minute segment for lunch. There will be a first set of punches for the day prior to lunch, and a second set for after.

Press save, and then log out.

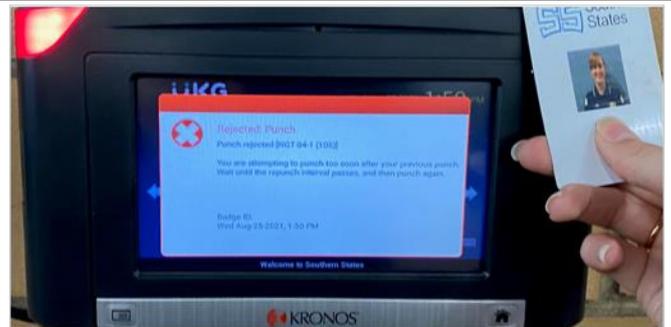


23. Timeclock - Operating and Registering Punches

Hold your badge to the top right of the time clock. The top left of the time clock will turn green on an accepted punch. You should receive a confirmation message saying "Punch Accepted." You are now clocked in/out.



If you scan your badge within a minute of previously scanning it, the top left will turn red. You will receive an error message saying 'Rejected Punch' with an error message listing why it was reject.



- If you want to select any option on the screen, simply press them lightly with your finger. When it requests your employee ID, scan your badge. Once you're done reviewing your information, be sure to press the Home button. The Home button is a physical button below the touch screen on the right. Its icon is a house.