Time & Attendance Solution

Quick Start Guide

Overview:

The aim of this document is to provide you with an introduction to the Eco Time product. It will supply you with the information you require to use the system on a daily basis, adding employees, viewing time and attendance data, rostering employees and generating payroll reports.

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2.1 Adding a new employee
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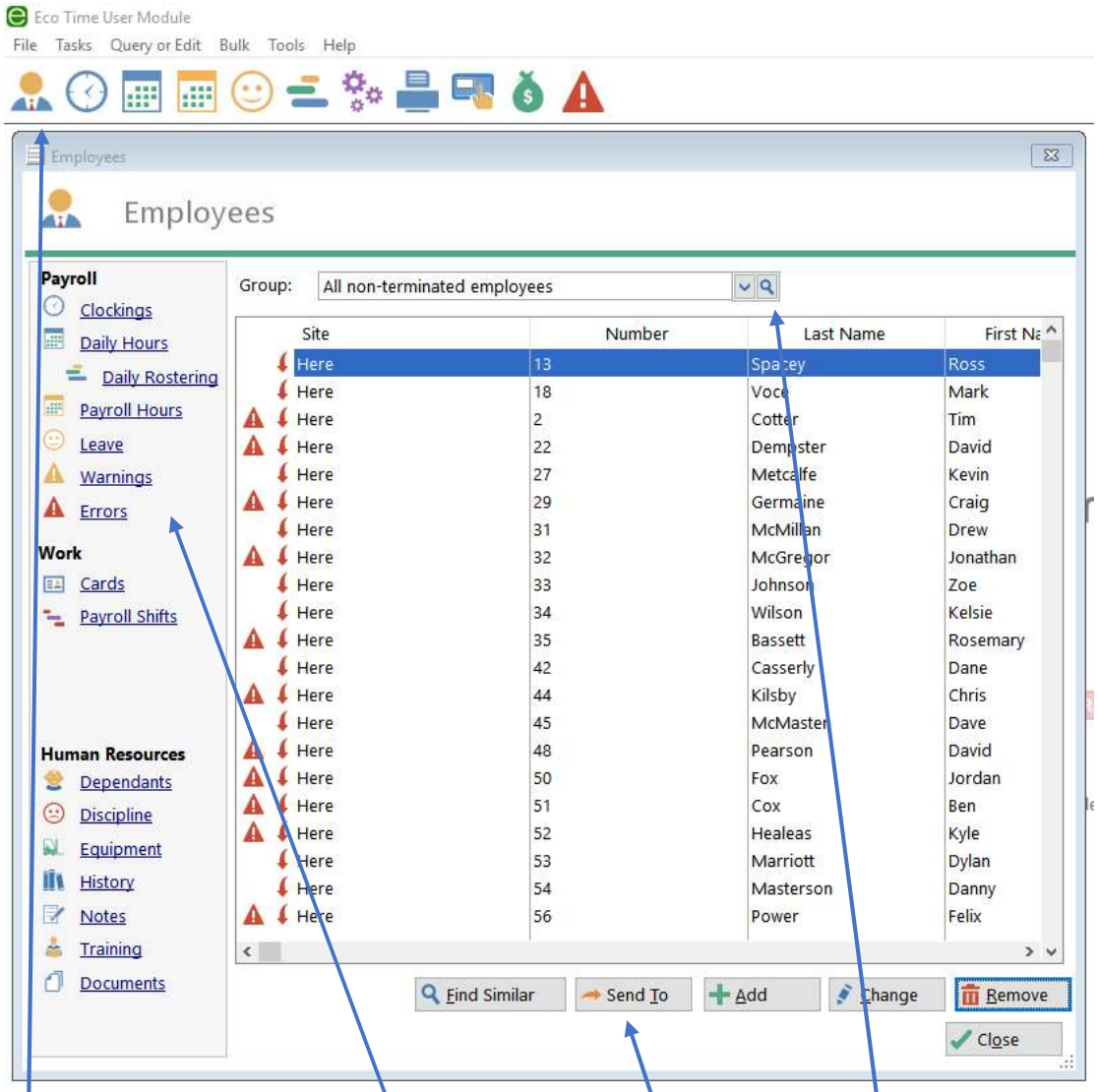
4. Understanding employee warnings
5. Fixing employee errors
6. Rostering your employees to shifts
7. Booking employees on leave
8. Producing reports

Please note that this guide may cover some elements from additional modules that are not included in all versions of Eco Time.

1. Finding your way in Eco Time



The icons along the top of the screen allow you to view information for a group of employees.

Clicking the Magnifying Glass icon will allow you to select a group of employees to view.

The icons down the side of the employee screen allow you to view information about a single employee

The Send To button on most screens allows you print, email or save the contents of the screen to a file.

The most used icons at the top of the screen are as follows:

	Browse employees
	View clockings for a group of employees
	View daily hours for a group of employees
	View payroll hours for a group of employees
	View leave for a group of employees
	Generate reports on your employees
	View employee clocking errors

Eco Time Terminology

Clockings: These are the raw clocking in and out times that are collected from the clocking terminals. For example, an employee may have clocked in at 8:00 and out at 17:00 on a given day.

Daily Hours: Once the clockings have been collected they are processed against the shifts to generate daily hours. For example, on a given day an employee may have worked 8 hours. Rules such as daily overtime and lunch breaks are applied here.

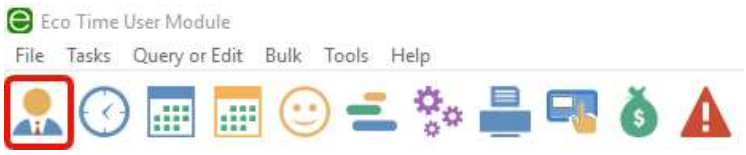
Payroll Hours: At the end of the week or payroll period all the Daily Hours are added together to give you a payroll total. Rules such as weekly overtime or bonuses are applied here.

Warnings: If an employee deviates from their working pattern you will get a Warning, for example if an employee comes in late, outside any grace time, you will see a warning telling you this. Warnings do not require any action; if the employees come in late, they will be paid from when they clock in or rounded to the next quarter (if applicable).

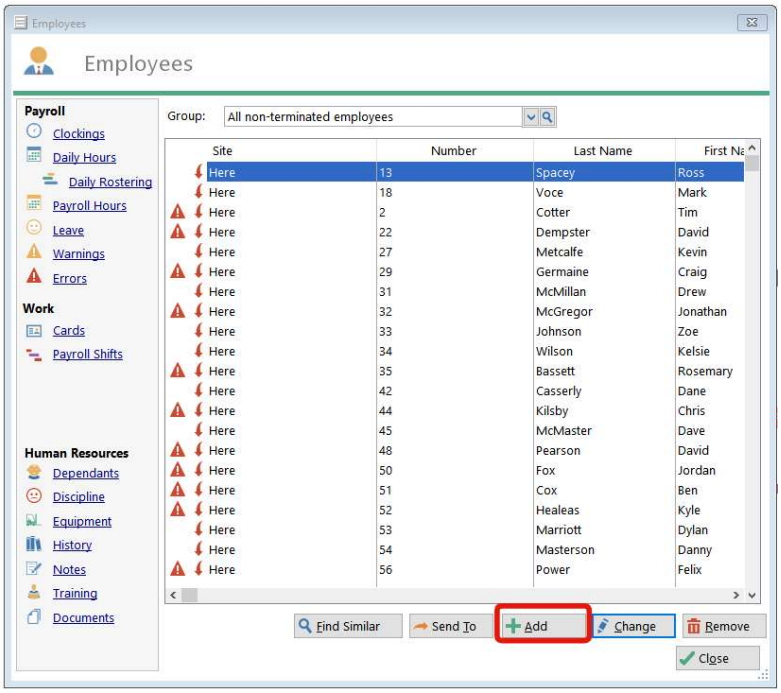
Errors: When employees forget to clock out you will get an error. So, if an employee clocks in at 8:00 and doesn't clock out Eco Time will flag this as an error. Errors must be fixed by adding clockings if required otherwise no daily and payroll hours can be generated.

2.1 How to add a new employee

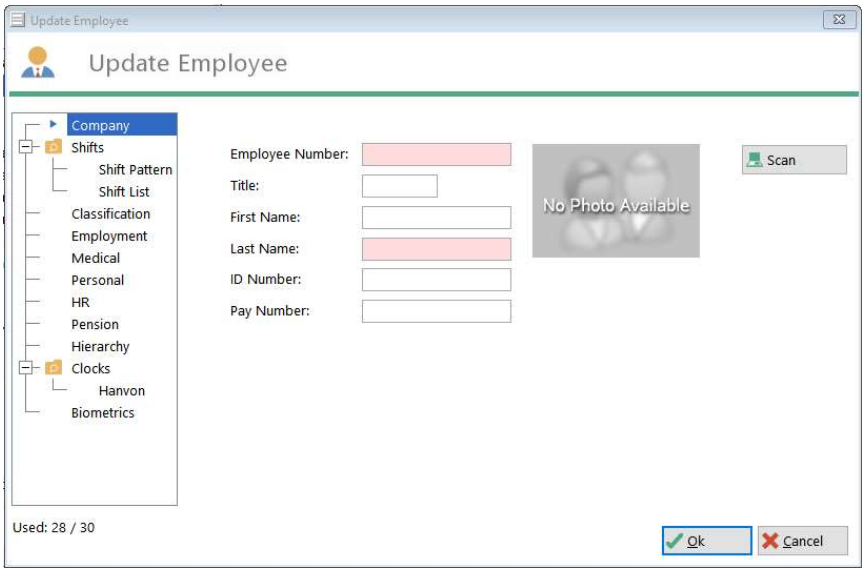
1: In the User Module click on the Employee Icon.



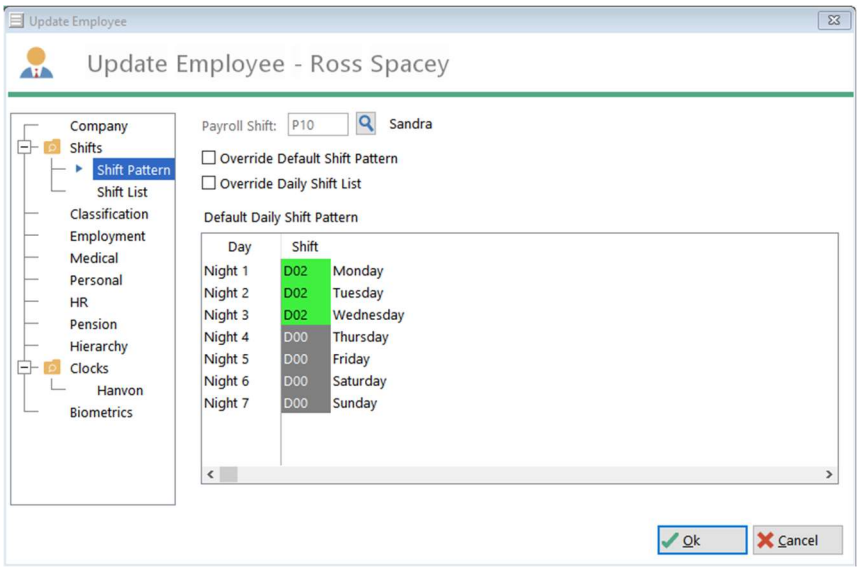
2: You will now see a list of your existing employees, click the Add button.



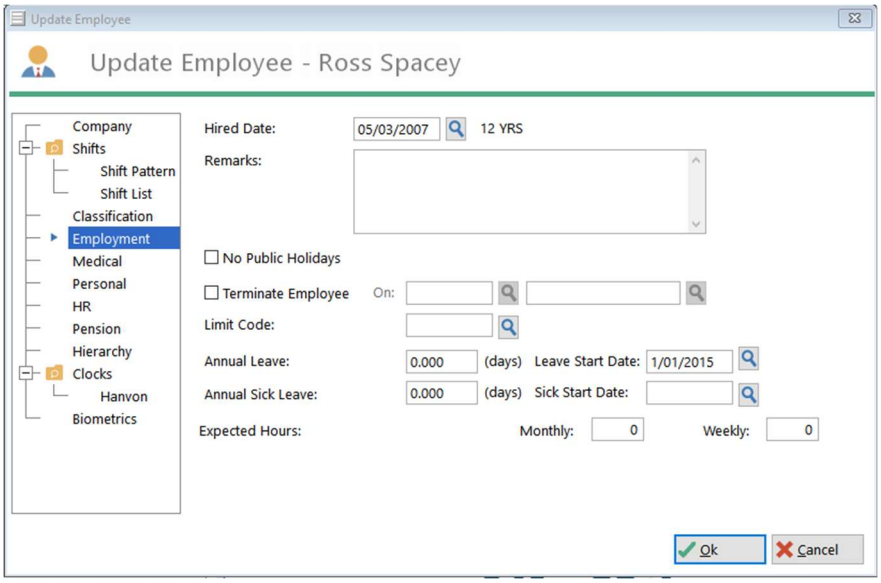
3: On the Company tab you can enter the new employee's details, as a minimum you need to enter your employee's payroll number, first name and last name.



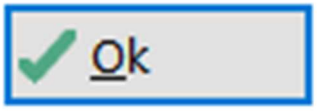
4: Next, select Shifts → Shift Pattern from the left-hand menu, use the 🔍 button to select the employee's initial working pattern from the list. Please also refer to section 6 if you use Rostering.



5: The next tab Employment allows you to enter the employees hired date and leave entitlements. These tabs are the minimum required for Eco Time to work successfully; the other tabs are optional.

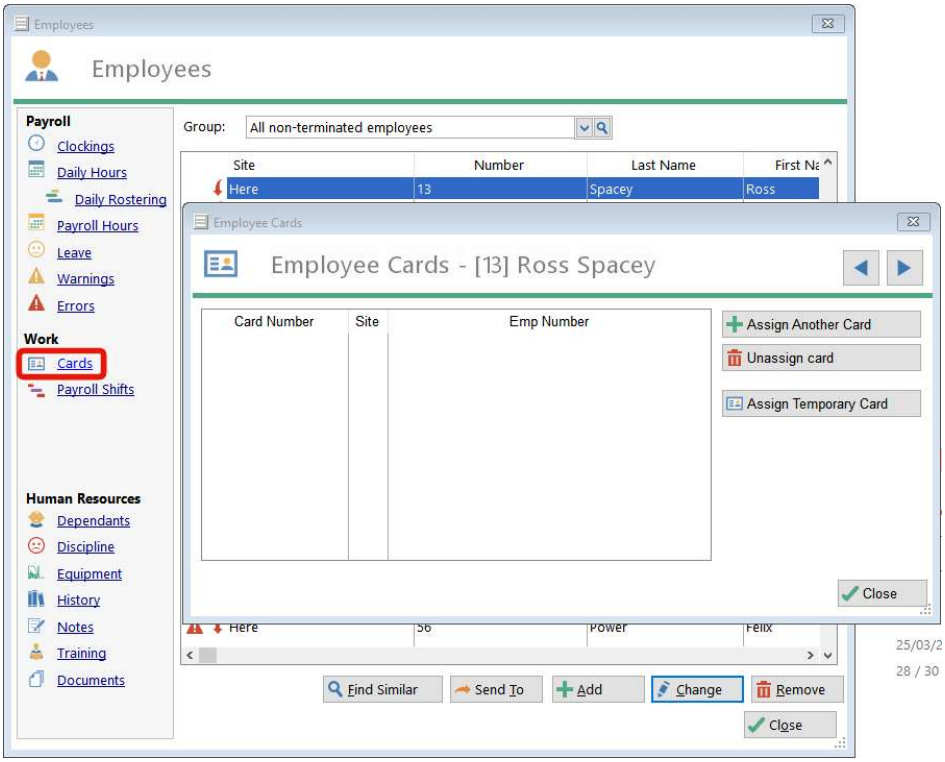


To Save the new employee click the Ok button.

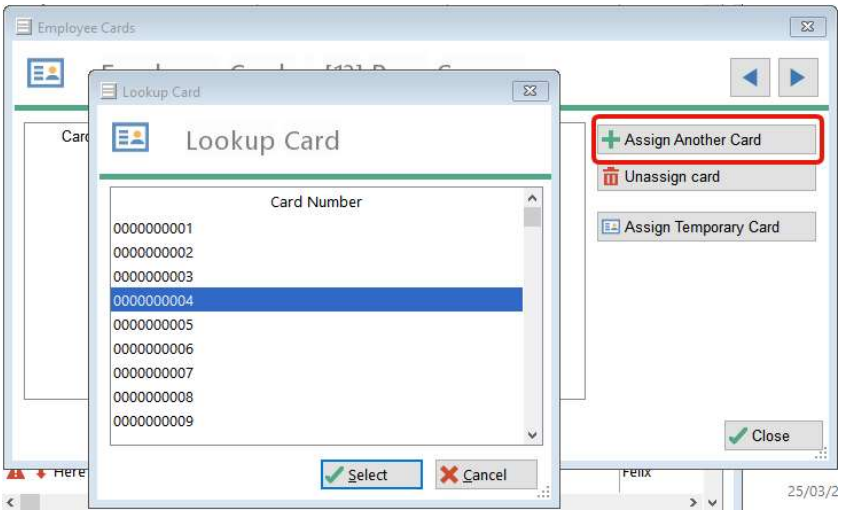


6: The final step is to assign the new employee a Card or PIN to use on the clocking terminal(s). To do this **make sure your new employee is highlighted** in the employee screen, then click Cards from the left-hand menu.

*PLEASE NOTE, IF YOU ARE USING FACIAL RECOGNITION, YOU WILL NOT NEED TO ASSIGN CARDS TO EMPLOYEES, **UNLESS** YOU ALSO OPERATE A FIRE ALARM ROLL CALL PRINTER TOO. THIS WILL BE SPECIFIED UPON INSTALL.*

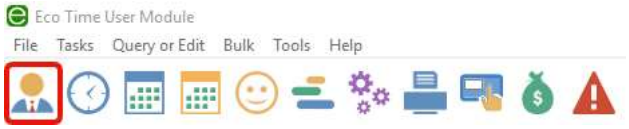


Next, click Assign Another Card and select a card number from the list. If you are using a proximity card terminal this is the number written on the card, if you are using a Handreader this is the PIN.

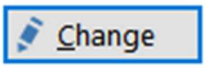


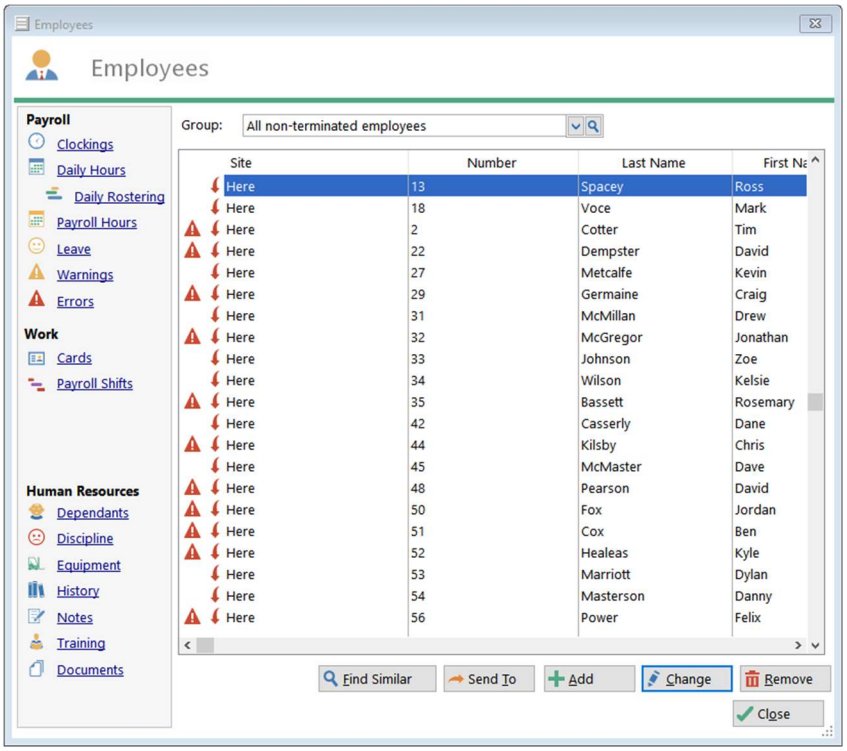
2.2 How to change an employee's details

1: To change an employee's details first click on the Employee icon.

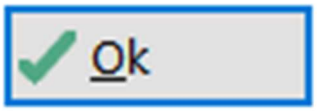


2: On the employee list you can either double click on the chosen employee to open the employee details screen or highlight them and click Change.



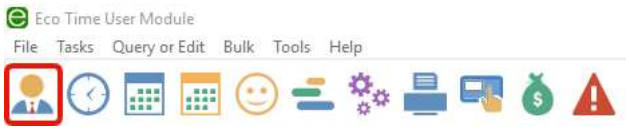


3: You can then update the required fields on the employee details screen and press Ok the save.

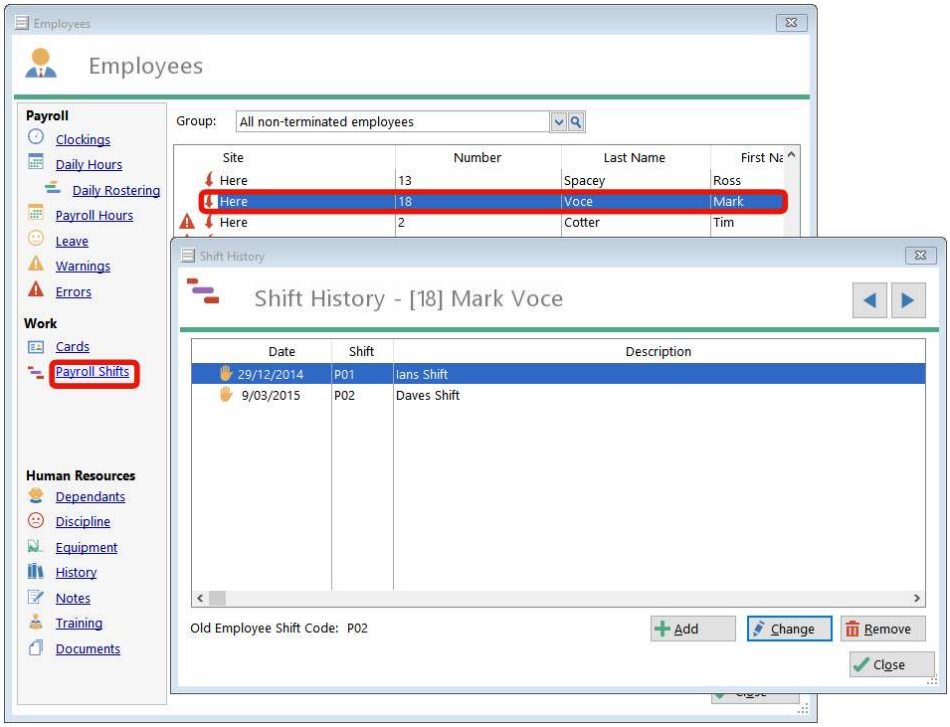


2.3 How to change an employee's shift

1: To update an employee's shift click on the Employee icon.

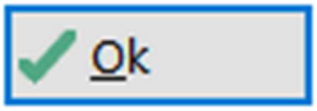


2: On the employee list highlight the chosen employee by single clicking on them and then click Payroll Shifts from the left hand menu.



3: On the shift history screen click the Add button and then on the update screen use the 🔍 buttons to enter the date the employee start works on the new shift and then the new shift, you can leave until date blank.

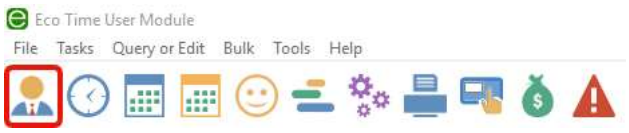
4: Press Ok and then Close to save the changes.



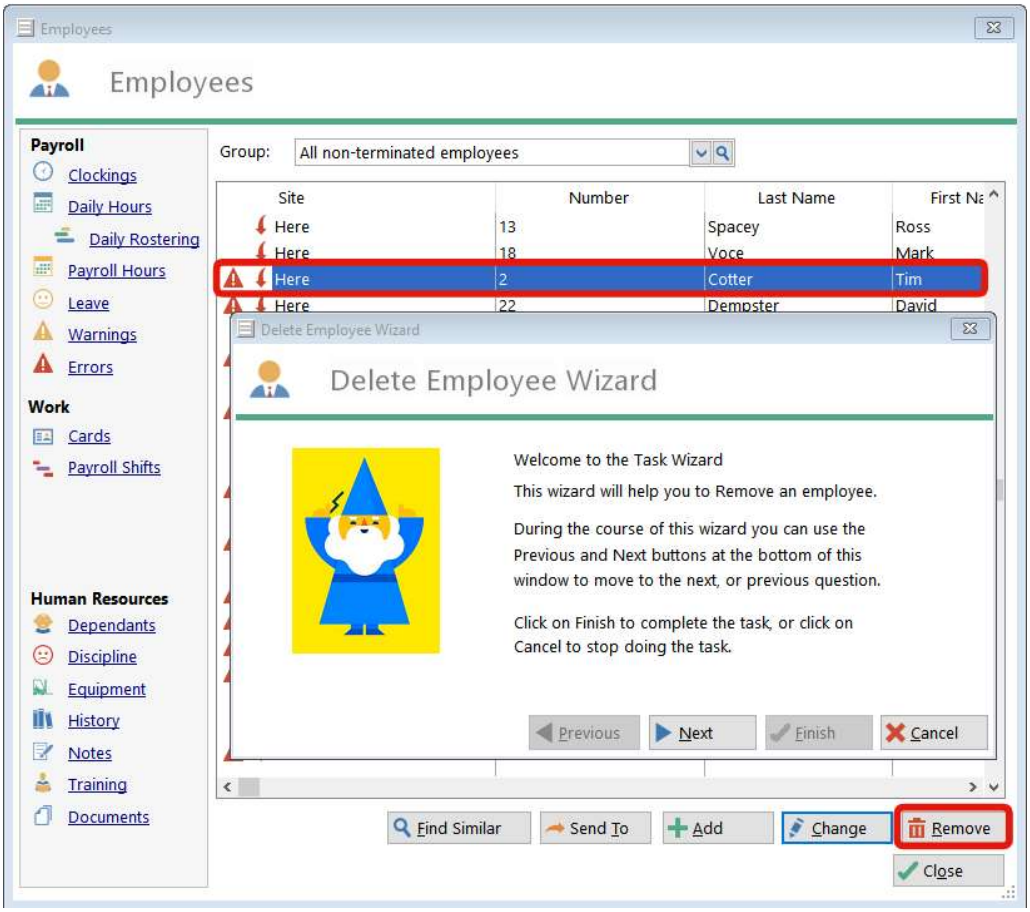
Please also refer to section 6 if you use Rostering.

2.4 How to terminate an employee

1: To terminate an employee first click on the Employee icon.

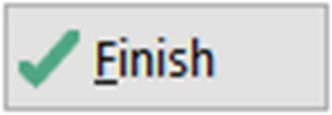


2: Then on the Employee screen highlight your chosen employee and click remove.



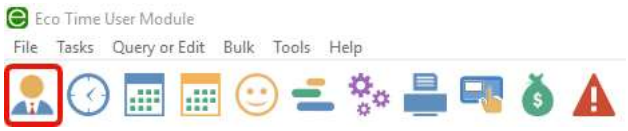
3: Run through the Delete Employee Wizard to terminate the employee, you may enter the termination date and a reason. Please keep in mind, if you wish to COMPLETELY delete an employee from the system, you must select “Remove”. This will delete everything, and anything ever put in to the system by the employee and CANNOT be recovered. We always recommend using Terminate as it is still able to recover data or reinstate the employee at a later date.

4: To complete the wizard click.



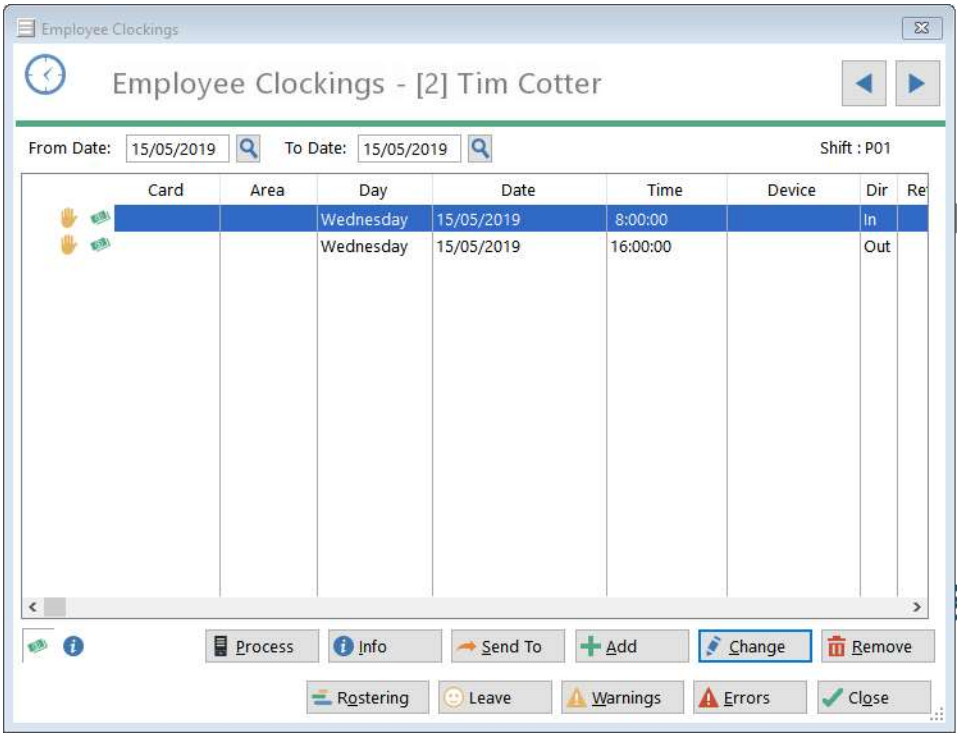
3.1 Viewing an employee's clockings

1: To view an employee's clockings first click on the Employee icon.



2: Select the employee you wish to view and click the Clockings button on the left-hand side.

3: You will be presented with a screen showing clockings over a date range. If you want to change the date range simply click on the 🔍 buttons and pick the chosen dates.



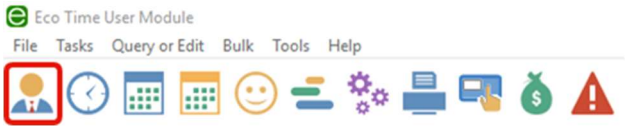
In some cases Eco Time is setup with additional modules that allow different types of clockings to be collected. This includes clockings for job costing, departmental tracking and access control, all of which can be viewed in this screen.

You can however choose which clockings you want to view by clicking the buttons in the bottom left of the window.

The green icon shows time and attendance clockings, this is the most popular option and will be selected by default. If you have access control the pink icon will show you these clockings and if you have job or department clockings these will be shown with an orange symbol.

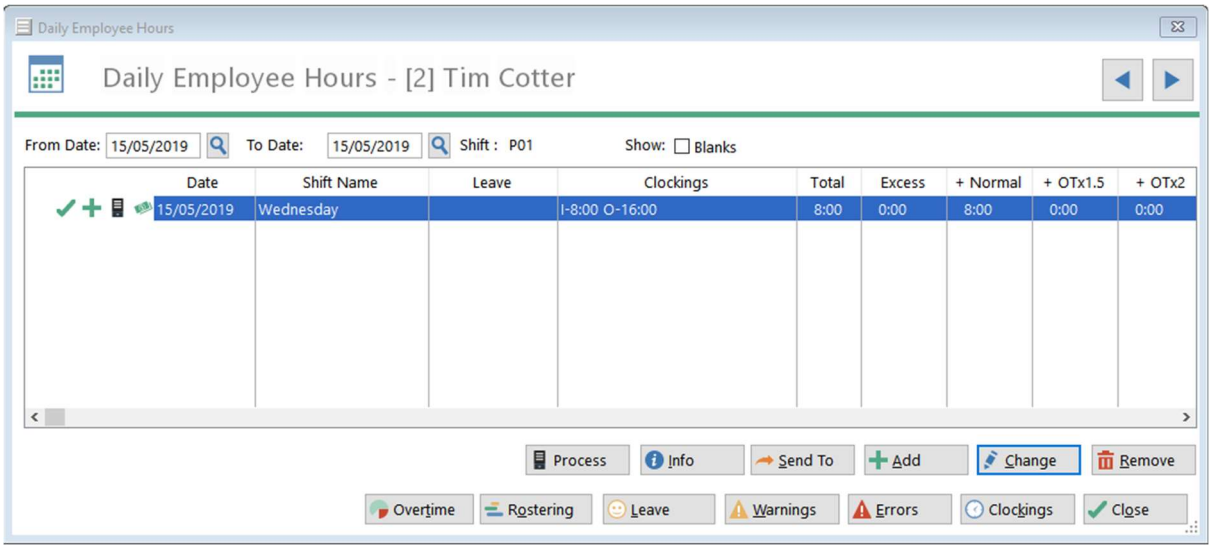
3.2 Viewing an employee’s daily hours

1: To view an employee's daily hours first click on the Employee icon.



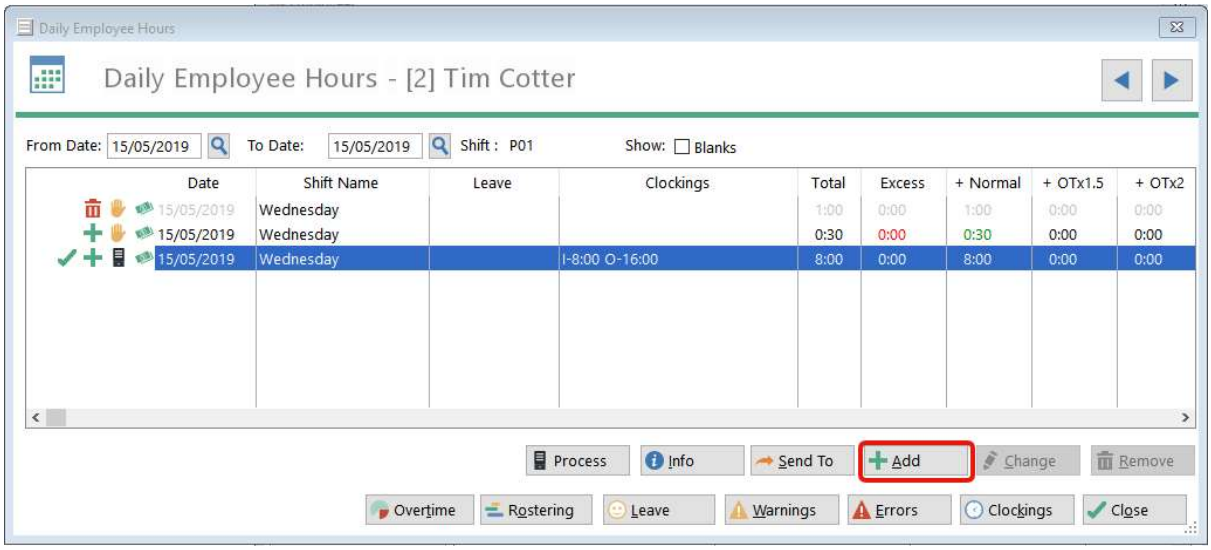
2: Select the employee you wish to view and click Daily Hours on the left side.

3: You will be presented with a screen showing daily hours over a date range. If you want to change the date range simply click on the 🔍 buttons and pick your new dates.

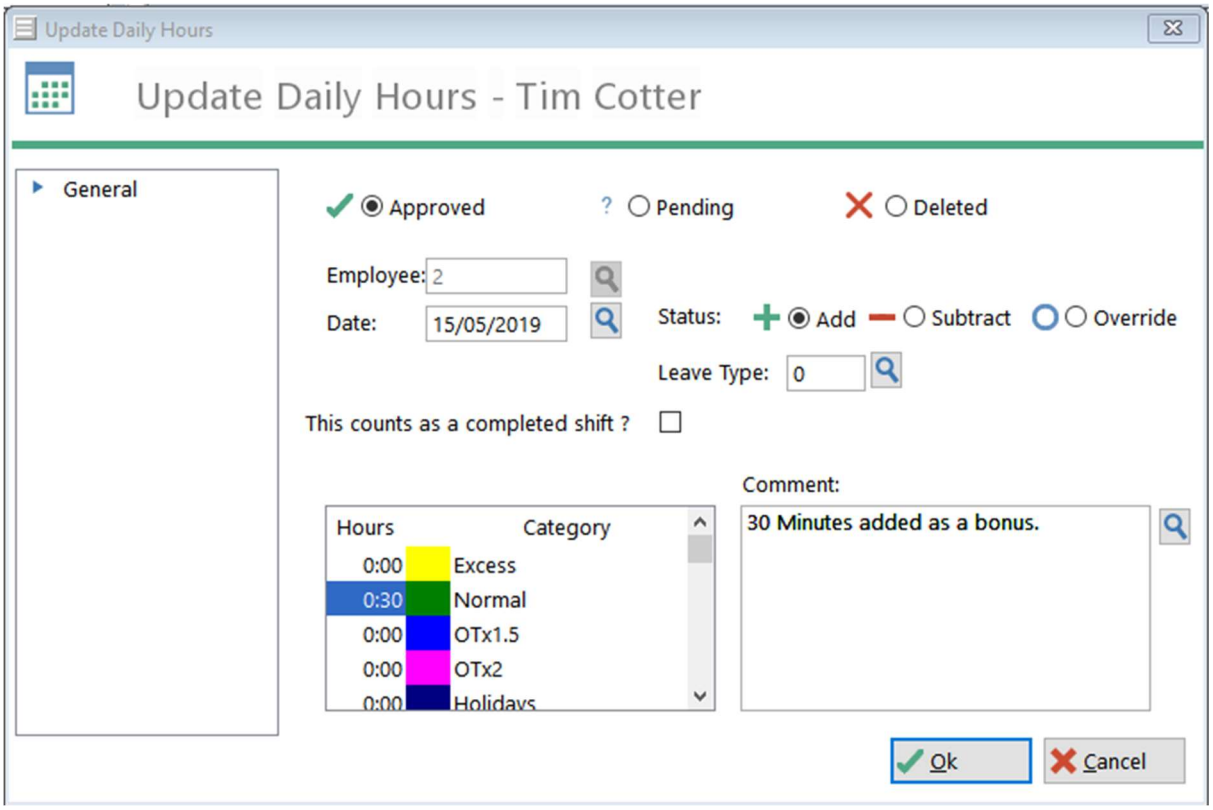


3.3 Adding employee daily hours

1: If you need to make an adjustment to an employee's daily hours you can simply click the Add button.

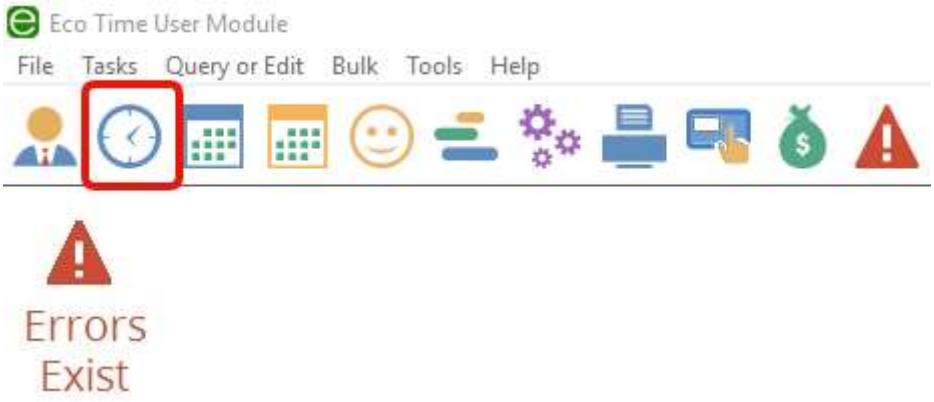


2: Select the correct date, whether you want to make an addition, subtraction of override the hours all to together and then enter the hours against the appropriate category. If you wish you can add a comment and click Ok to save.

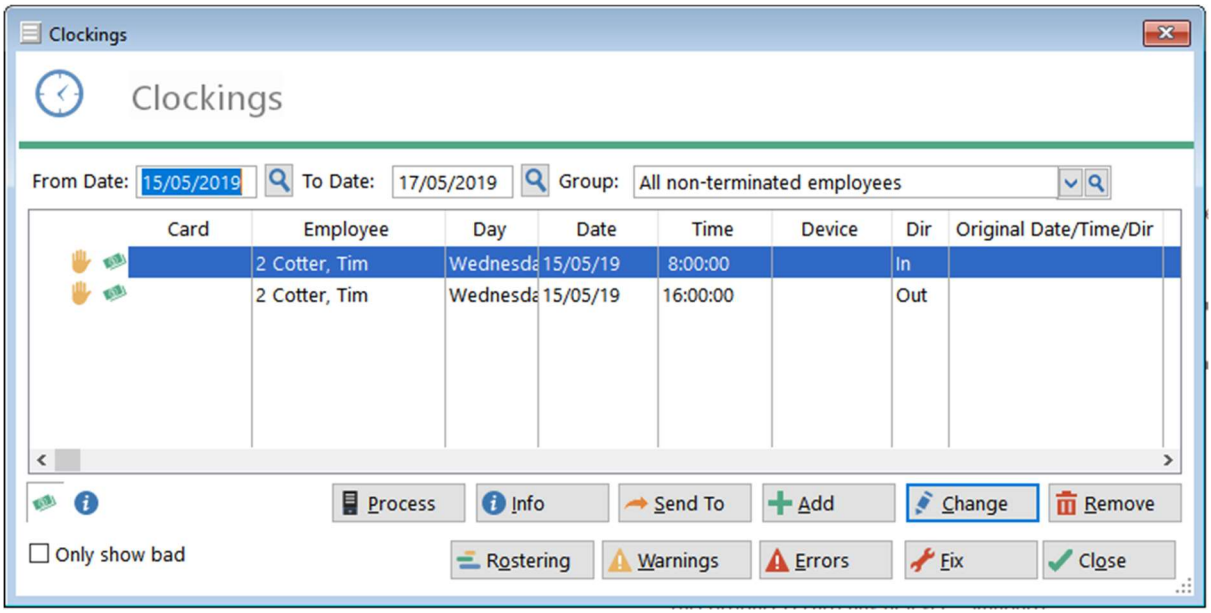


3.4 How to view clockings for a group of employees

1: Click on the Browse Clockings icon from the top of the screen.



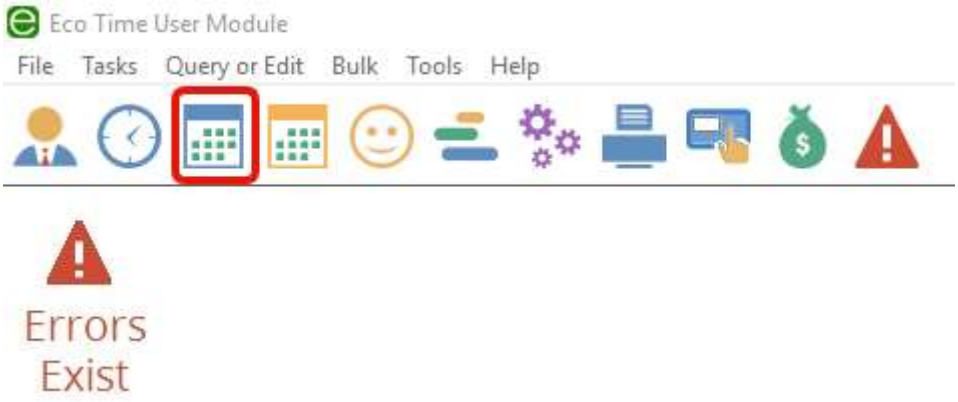
2: You will be presented with a screen showing all the clockings for the select group over the given date range. If you want to change the date range simply click on the 🔍 buttons and pick your new dates.



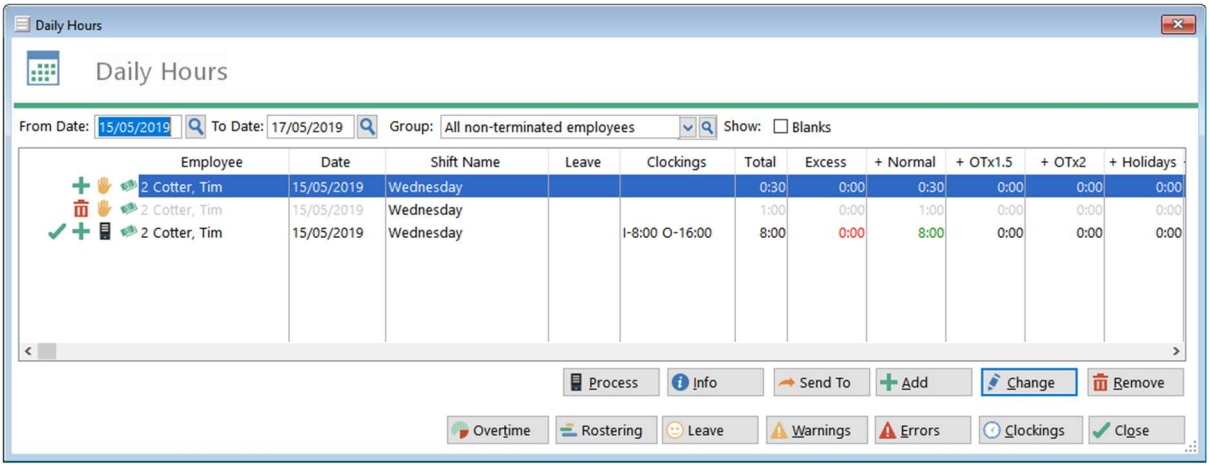
The clockings on this screen are displayed in the same way as before on the Employee Clockings screen. This screen is useful to view the clocking in times for your employees on a specific day.

3.5 How to view daily hours for a group of employees

1: Click on the Browse Daily Hours icon from the top of the screen.

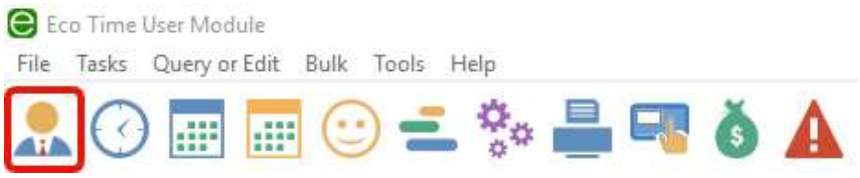


2: As with the group clocking screen you will now be shown a list of daily hours for your chosen group of employees.



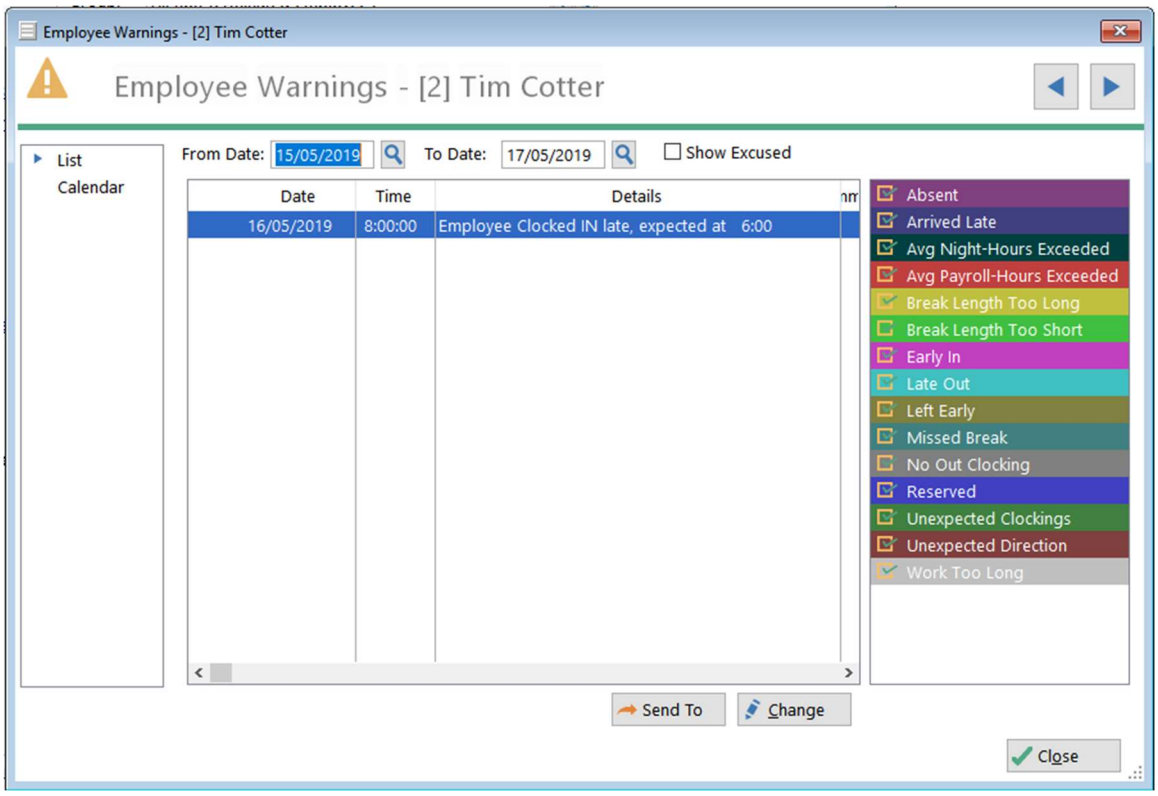
4.1 How to view warnings for a single employee

1: Click on the Browse Employees icon from the top of the screen.



2: Select the employee you wish to view and click

3: You will be presented with a screen showing any warnings over a date range. If you want to change the date range simply click on the 🔍 buttons and pick your new dates.



There are two ways of viewing an employee's warnings either a list view or a yearly calendar.

The list view opens as default where you can define the date range you are interested using the buttons and on the right-hand side of the screen you can tick the warning types you wish to display.

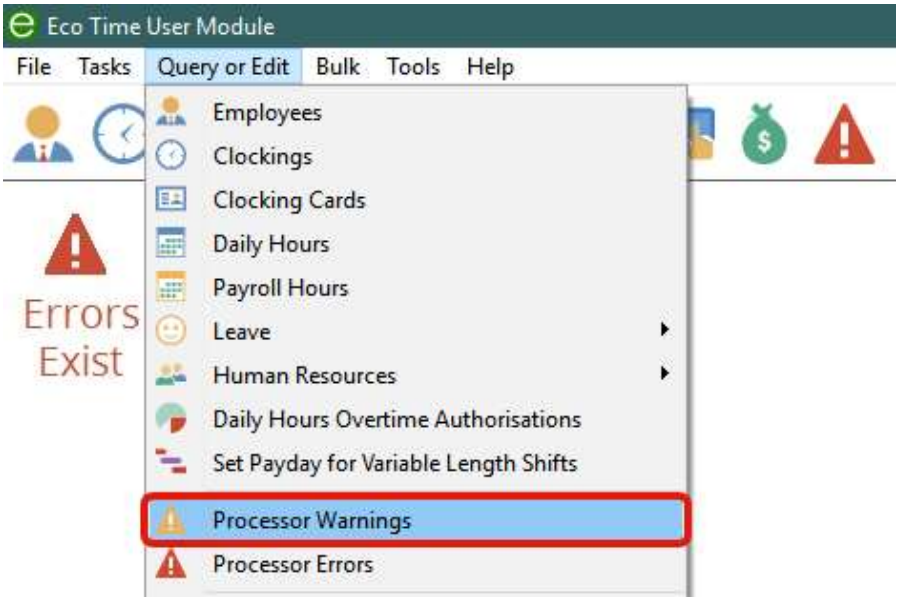
The calendar view can be selected from the left-hand menu which allows you to see any patterns of employee warnings such as if the employee is always late in on a Monday morning etc.

You do not need to do anything with this information as the shift pattern will only pay the employee for the work they have done.

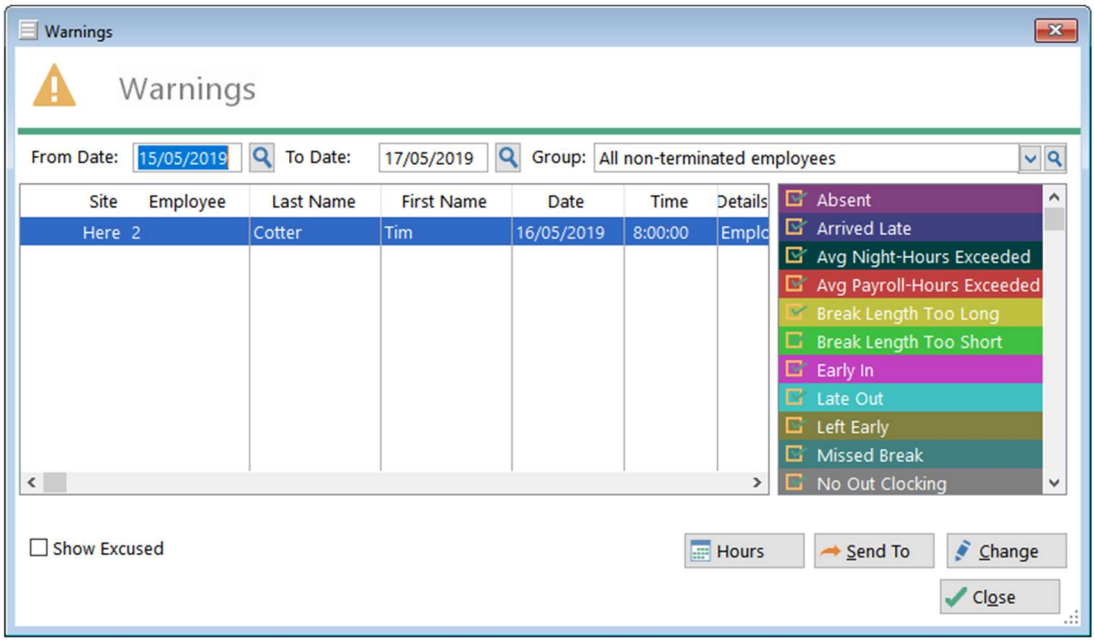
For example, if they are late, they will lose the first fifteen minutes, although this depends on your exact configuration.

4.2 How to view warnings for all employees

1: Click on “Query or Edit” on the top bar on the left, then select “Processor Warnings” on the dropdown box.



2: You will be presented with a screen showing the employee warnings over the given date range. If you want to change the date range simply click on the 🔍 buttons and pick your new dates, you can tick the warning types if you wish to display from the list on the right.



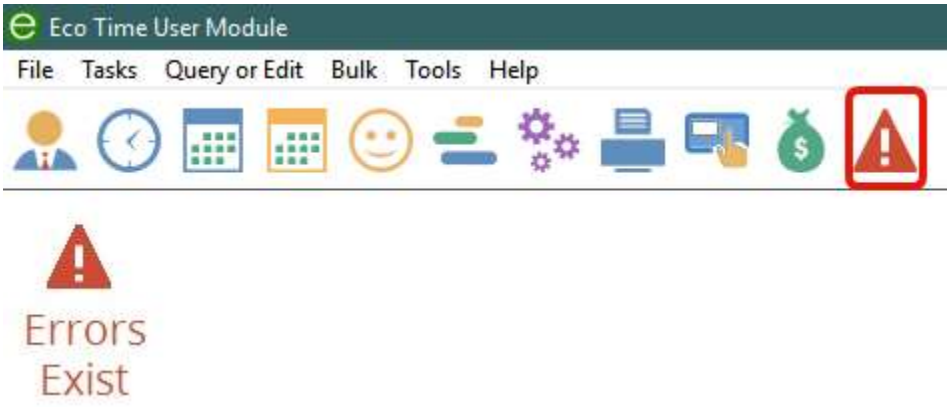
ECO TIME ENTERPRISE EDITION ONLY:

As a further step you can use the Analysis button that allows you to look at the total number of warnings per employee or per classification such as department. The Analysis screen works in a similar manor to this one, select your employees, classification, dates and warning types and then hit the calculate button to generate the data.

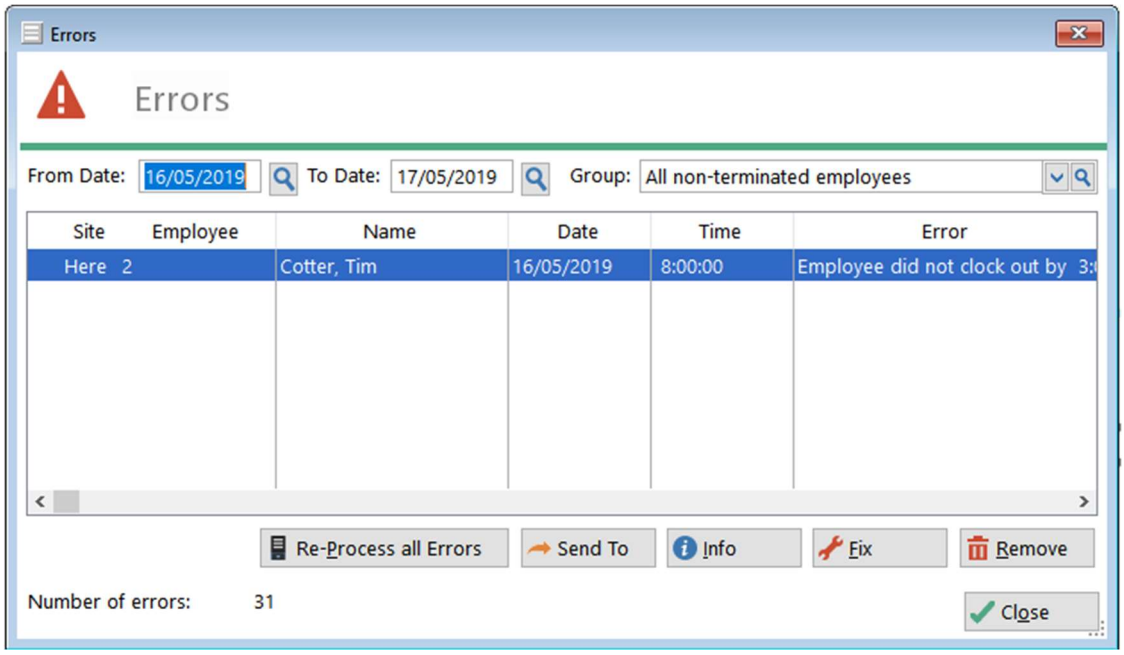
5: How to fix clocking errors

An employee will generate a clocking error if they do not clock IN and OUT correctly. Usually an error is created when an employee clocks IN but fails to clock out at the end of their shift. You will also get the same problem if an employee fails to clock IN, but clocks OUT. It is important that these errors are identified and fixed to ensure that the employee is paid correctly.

1: Click on the Errors icon from the top of the screen (if you see a green go sign there are no errors).



2: The Browse Errors screen will give you a list of all the employees who have got missing clockings. You can use the the🔍 buttons to change the date range and select your group of employees.

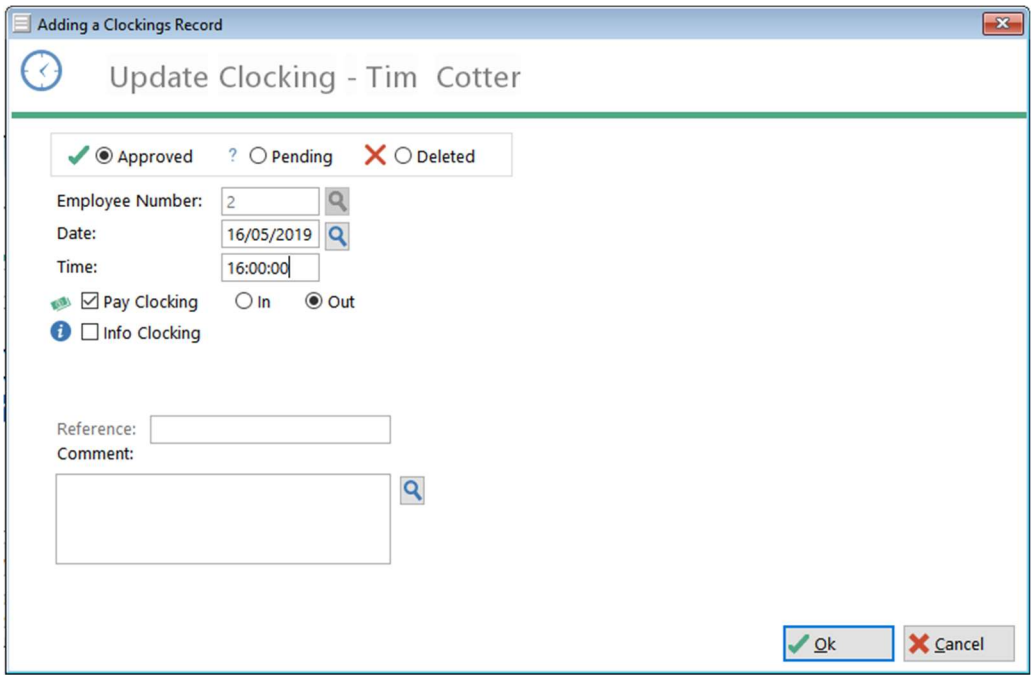


3: To fix the error, highlight the chosen record then click Fix.

You will now see the clockings on and around the error; the alert icon to the left side shows where the clocking in question is. In this example the employee worked on Wednesday clocking in and out correctly but on Thursday, they clocked in but forgot to clock out. To fix the error we need to add an out clocking for the Tuesday to fix the error.

4: Click the Add button

5: You can now add the missing clocking. You need to enter the correct date, clocking time and direction. When you press OK the clocking will be added to the clockings list, closing the clockings screen will automatically re-process the hours and remove the error.



If the employee has clocked extra times or has got clockings mixed up i.e. in when they should be out and vice versa you may have to change more than one clocking. If necessary, you can change a clocking by highlighting it and clicking Change, the screen looks the same as the above.

Essentially, when fixing errors, it is important you restore the clockings to follow the in, out pattern throughout the shift.

6.1 How to prepare employee rosters

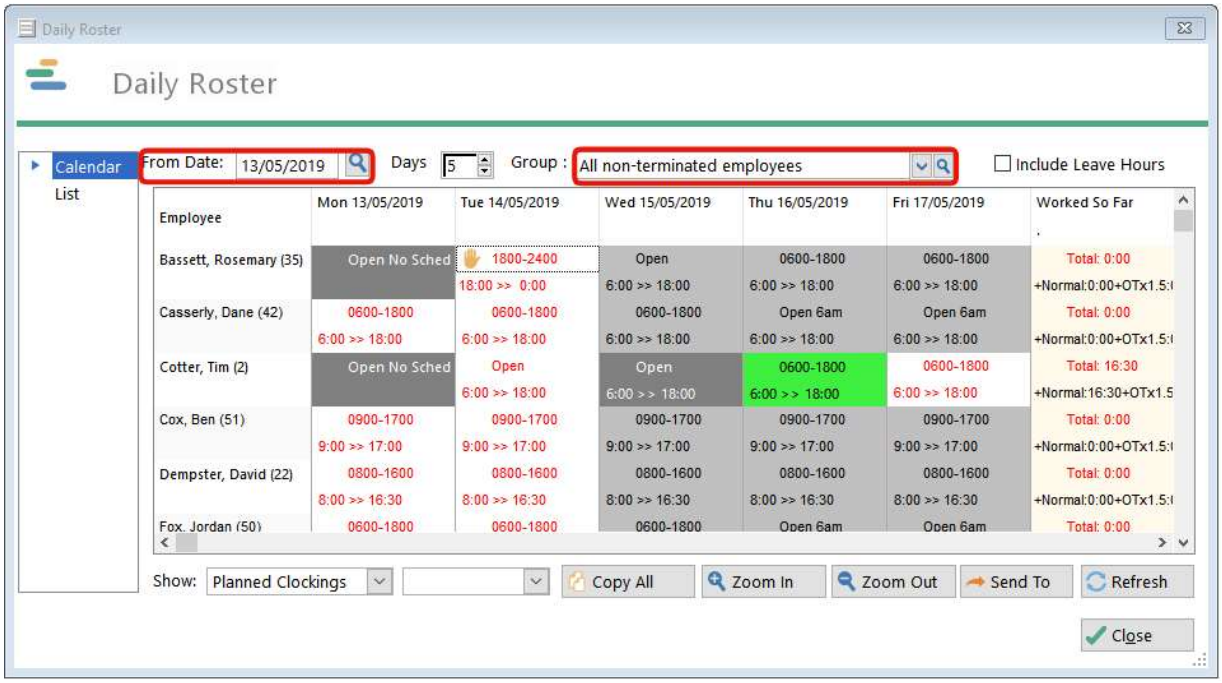
Eco Time has 2 different ways to use employee rostering; both require your system to have been setup to allow this style of working. The first method allows you to create random patterns or overrides that do not repeat. We call this method “Daily Rostering” as you can override which daily shift the employee works on the assigned day.

Method 1

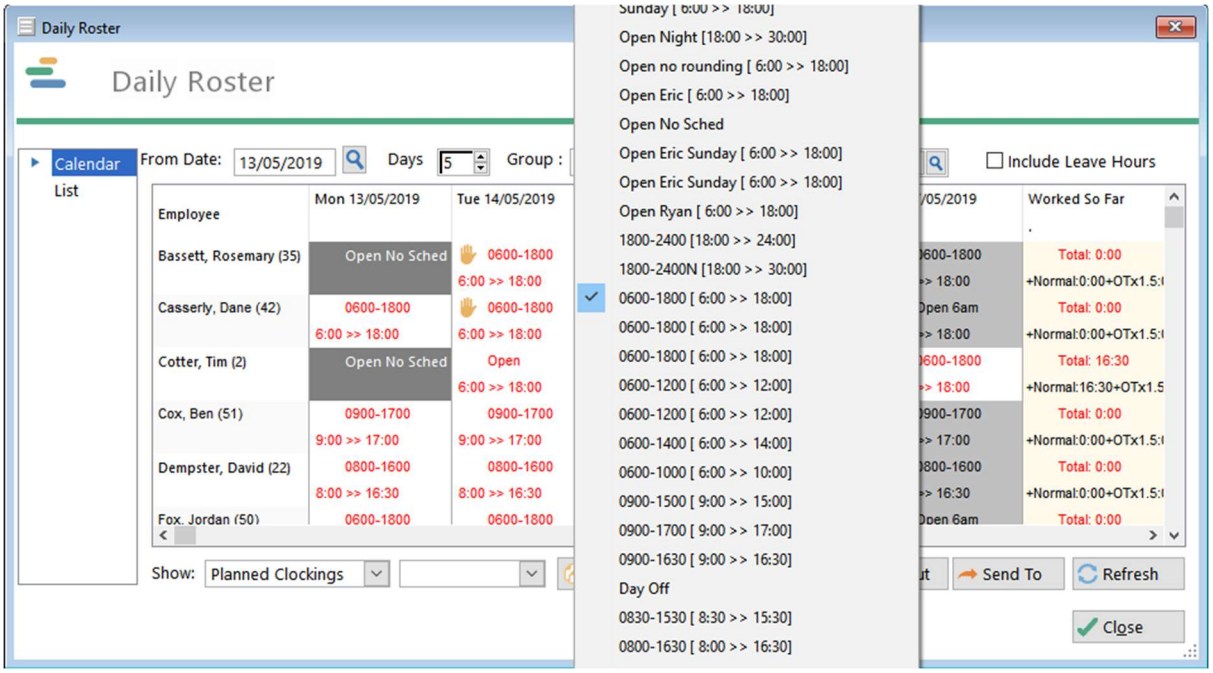
1: Click on the “View Daily Roster” icon at the top of the page (shown below).

2: This screen will list all of the Daily Shifts your employees are set to work on the selected days. If a shift is marked as “Open” generally, the given start and finish times can be ignored. The system just requires the fields to be filled in.

You can change the start date you want to view the rosters from and select your group of employees using the 🔍 buttons.



3: To roster an employee to a shift, right click on the chosen employee and day.



4: You will be given a list of possible shifts for each department; simply click on the shift you wish to assign to the selected employee. Once you have completed the roster it should look something like this. Once it has been adjusted, a Hand Icon will show on the side of the new roster. In the below example, we have moved this employee to a Day Off instead of a Shift which also shows the day as grey for this employee.

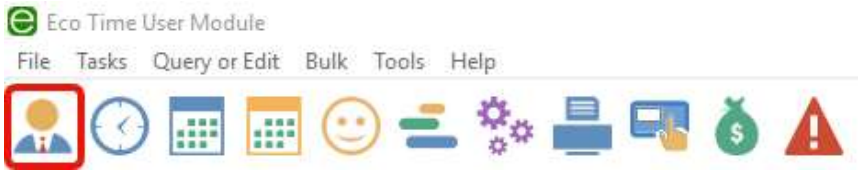
Once an employee has been rostered an employee's clockings will be processed against the correct times. Allowing you to monitor which employees are arriving late or leaving early.

Rosters are best generated in the future but can be changed as required even after the event if necessary. Even though the shifts are departmentalised it is essential that the employees' clock into the correct department on the hand reader.

Method 2

The second method we call “Payroll Rostering” if you have employees who often switch their payroll shift often, this would be ideal for you. If your pay period is weekly, your shifts in turn would be set up to function weekly. If you have assigned a day shift worker to suddenly work night shifts for a fortnight, Payroll Rostering him would be a much better option than daily rostering and you can choose which date the employee works their new shift to. After the end date has passed, they will return to their default, previously assigned shift.

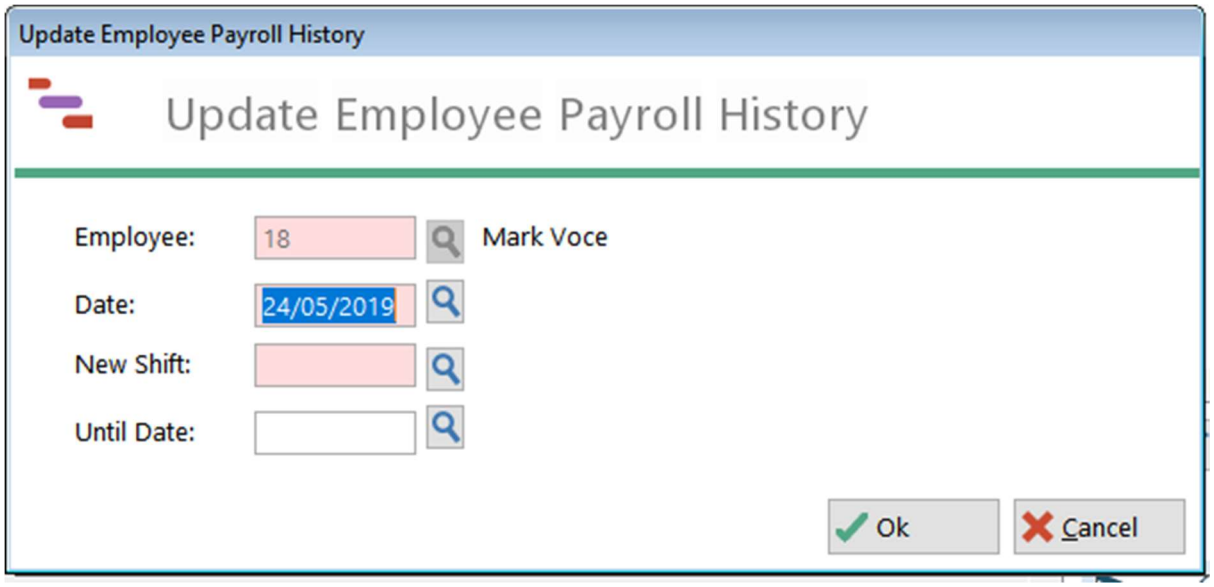
1: Click on the Browse Employees icon from the top of the screen.



2: Select the employee you wish to view and click Payroll Shift on the left-hand side.

3: This will show the currently assigned shift (please refer to dates on the left) …Click the Add button

4: Simply use the buttons to assign the shift the employee will be working and the from and until dates. If you do not apply a until date, the shift will be worked permanently.

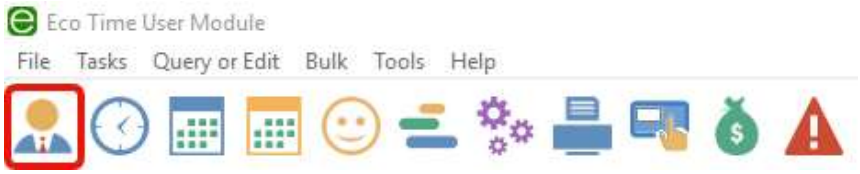


Once finished, simply press OK and allow the data to back process if you are have selected a date before the current date.

7: How to book employee leave

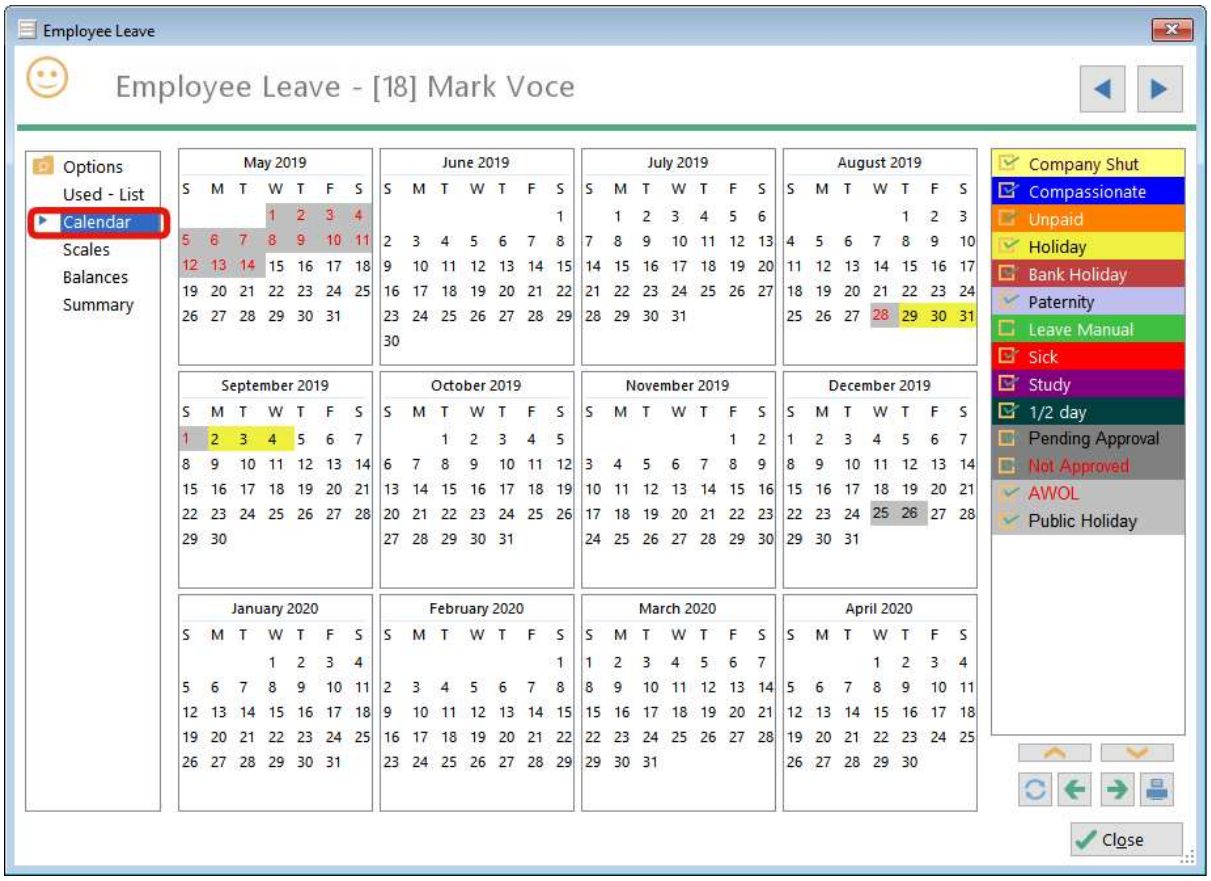
There are two ways you can book employee leave; the first way is from the employee screen.

1: Click on the Browse Employees icon from the top of the screen.

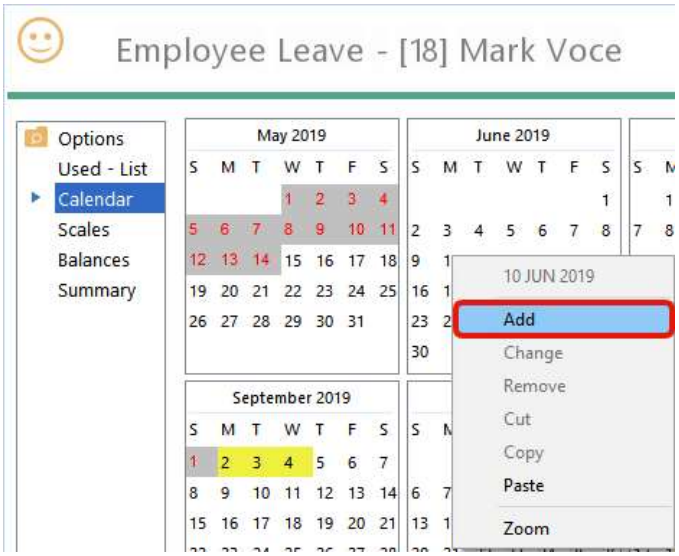


2: Select the employee you wish to view and click Leave on the left-hand side

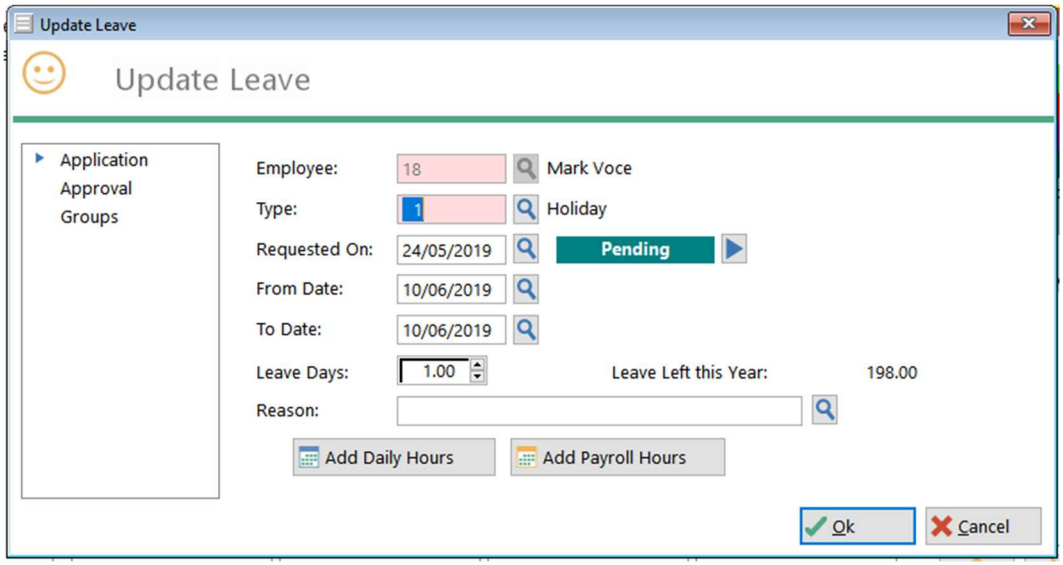
3: You can select to view the employee leave calendar as a list or a more popular calendar. However, if you would rather see a list view of Holidays booked, remain on Used-List.



4: To add a leave booking right click on the required day on the calendar and click Add.



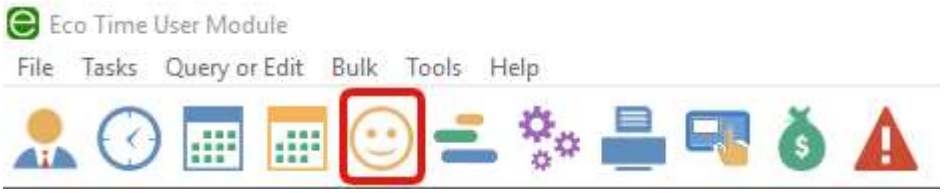
5: You will see a booking screen allowing you to enter the type of leave, the duration and a reason for the leave.



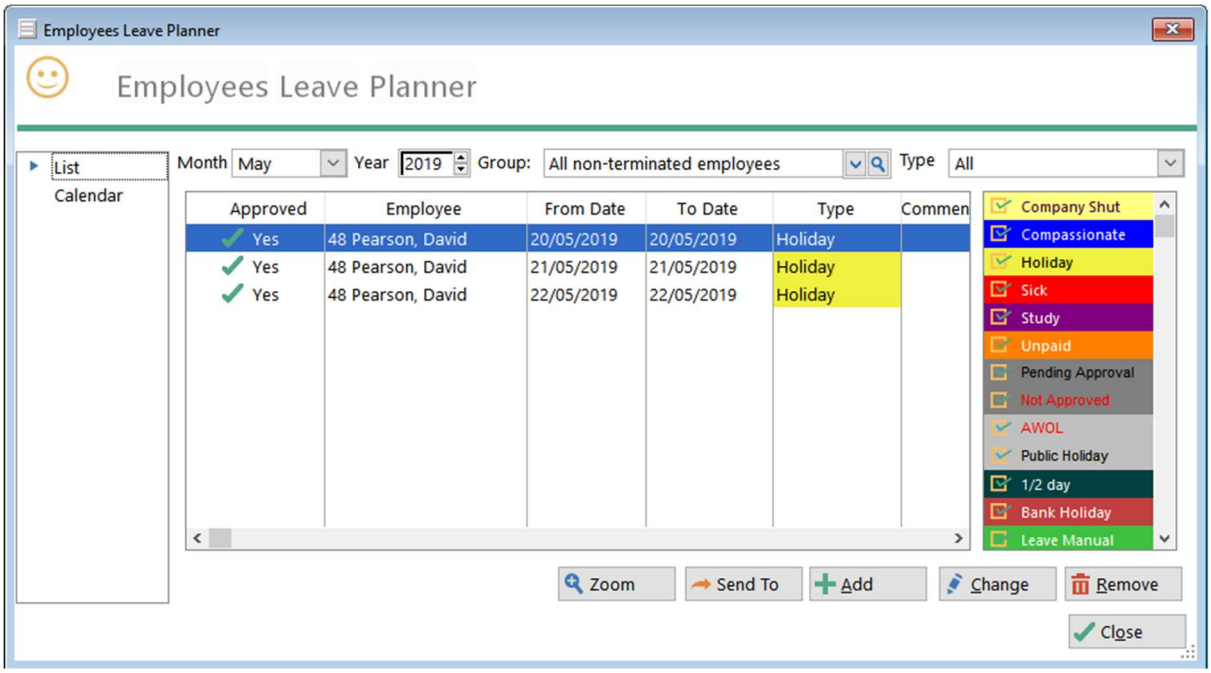
Once you click OK the leave will appear as a colour coded block on the leave planner. The leave will also appear on the roster screens.

The second way to book employee leave is to use the group leave planner.

1: Click on the Browse Leave Icon from the top of the screen.



2: The employee leave planner will display a chosen group of employees for one month; this planner is useful to ensure you do not book too many people away on leave at the same time.



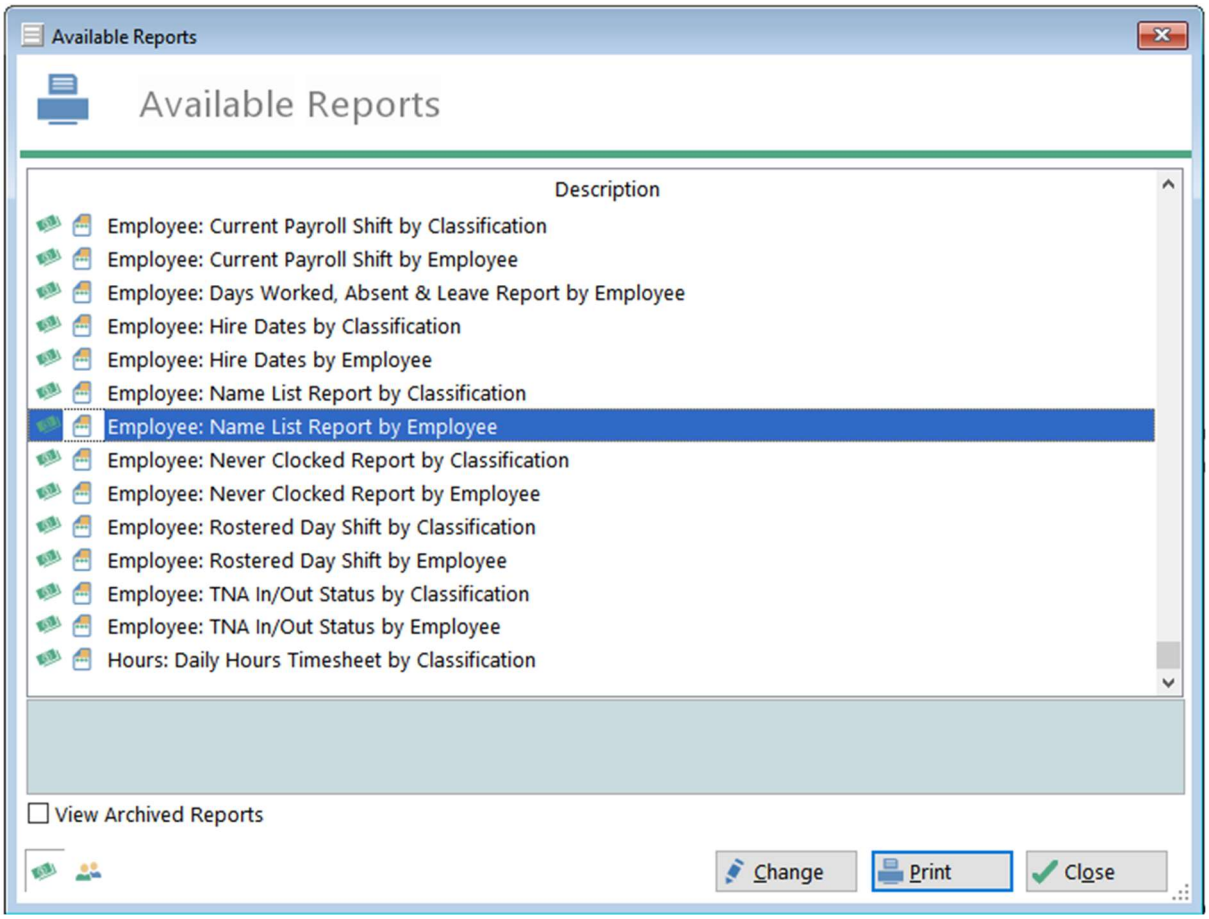
You can book leave from here too, simply right click on the chosen employee and date, click add and follow the instructions as before.

8. How to print reports

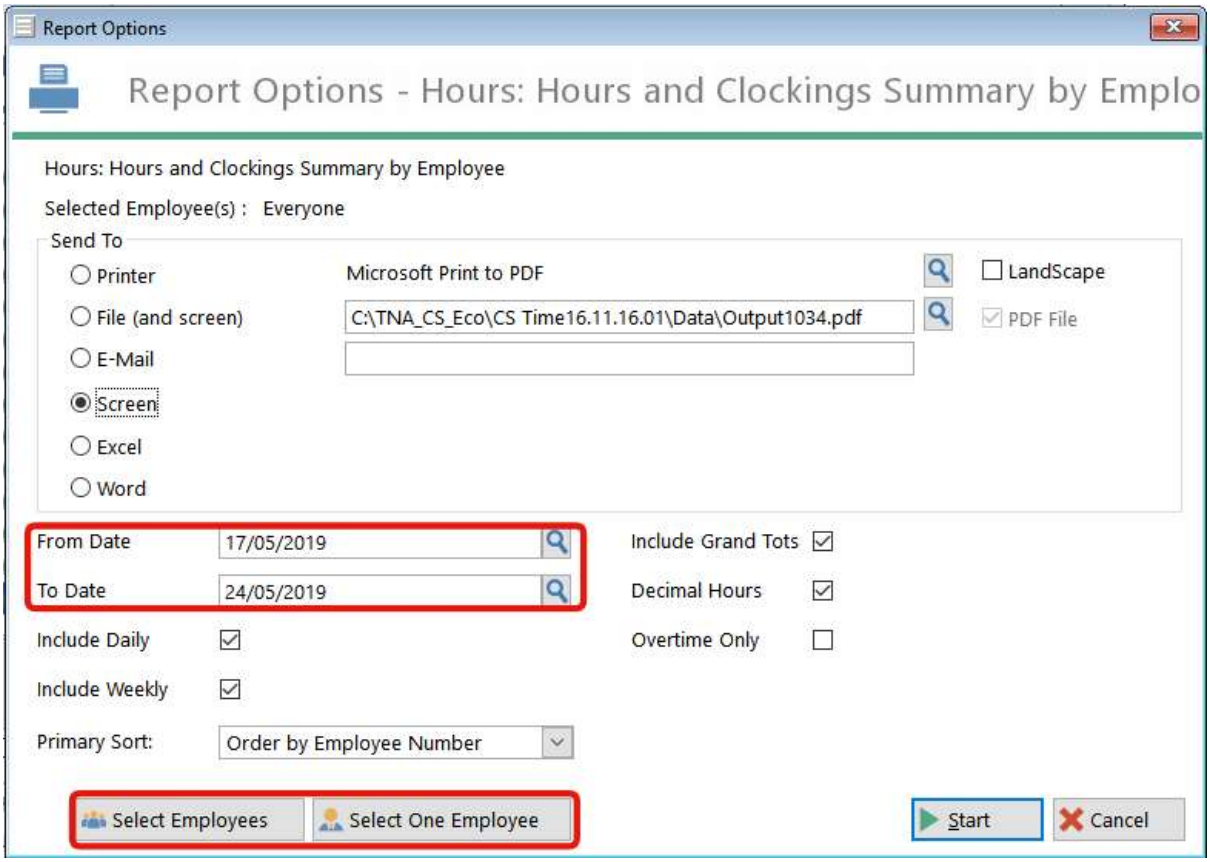
Eco Time contains a wide selection of reports that allow you to view / print / export information on employees, clockings, hours, warnings, errors etc.

1: Click on the Reports icon at the top of the screen.

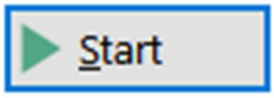
2: You then get a list of reports to choose from. The file name of the report describes what the report does. Once you have found your chosen report click Print.



3: You will then see a report options screen; here you can set the date range and who you want to print the report for.



4: Once you are ready click Start.



The report will be generated to a screen viewer; you can then print the report from here by clicking Print.

Recommended Reports

Name: Hours: Hours & Clockings Summary by Employee

Overview: This report will give you breakdown for each employee that will include a line for each day containing clockings and hours along with totals. The employees can be ordered by either name or number order.

Hours and Clockings Summary by Employee from 06/01/2014 to 12/01/2014

Printed on: 26/02/2014 at 11:44:39

Selection: All non-terminated employees

Employee No: T01 **Name: McGann, Lee** **Shift: P01**

Date	Rate	Clocking	Excess	Normal	OT 1	OT 2	Hol
6/01/2014	A	I-8:40 O-12:00 I-13:00 OM-17:30	.	6:00	1:30	.	.
7/01/2014	A	IM-9:10 O-17:56	.	6:45	2:00	.	.
8/01/2014	A	I-9:35 O-15:14	.	5:00	0:45	.	.
9/01/2014	A	I-9:11 O-12:00	.	2:45	.	.	.
10/01/2014	A	I-9:30 O-14:30	.	5:00	.	.	.
11/01/2014	A	I-8:00 O-21:00	.	8:30	4:30	.	.
12/01/2014	A		.	.	.	.	.
		Total Daily Hours:	.	34:00	8:45	.	.
		Total Payroll Hours:	.	34:00	8:45	.	.

Employee No: T02 **Name: Smith, Fred** **Shift: P01**

Date	Rate	Clocking	Excess	Normal	OT 1	OT 2	Hol
6/01/2014	A	IM-7:35 OM-16:30	.	8:30	0:30	.	.
7/01/2014	A	IM-7:30 OM-16:30	.	8:30	0:30	.	.
8/01/2014	A	I-7:30 O-16:00	.	8:30	.	.	.
9/01/2014	A	I-7:30 O-16:00	.	8:30	.	.	.
10/01/2014	A	I-7:30 O-16:00	.	8:30	.	.	.
11/01/2014	A		.	.	.	.	.
12/01/2014	A		.	.	.	.	.
		Total Daily Hours:	.	42:30	1:00	.	.
		Total Payroll Hours:	.	42:30	1:00	.	.

Name: Hours: Hours & Clockings Summary by Classification

Overview: This report is the same as the above report by allows you to breakdown a group of employees into a subgroup such as department.

Name: Hours: Payroll Hours Timesheet by Employee

Overview: This report will give you a single line for each employee for each payroll period. This report is great when you want to just get the total hours for each employee worked. The employees can be ordered by either name or number order.

Name: Warnings: Early, Late and Absent by Employee

Overview: Prints employees who have arrived late, left early or been absent within a date range.

Employee Early, Late & Absent Warnings Report by Employee from 6/01/2014 to 12/01/2014
Printed on 26/02/2014 at 11:53:07
Selection: All non-terminated employees

Date	Employee No	Name	Expected	Clocked	
07/01/2014	T01	McGann, Lee	9:00	9:10:00	***Late Arrival***
08/01/2014	T01	McGann, Lee	9:30	9:35:00	***Late Arrival***
09/01/2014	T01	McGann, Lee			***Absent***
10/01/2014	T01	McGann, Lee	14:30	14:20:00	***Early Departure***
06/01/2014	T02	Smith, Fred	7:30	7:35:00	***Late Arrival***
08/01/2014	T03	Ross, Paul	9:30	9:38:00	***Late Arrival***
10/01/2014	T03	Ross, Paul	13:00	12:45:00	***Early Departure***
08/01/2014	T04	Jones, Peter	8:30	8:35:00	***Late Arrival***
09/01/2014	T05	Ward, Tom	9:30	9:35:00	***Late Arrival***

Name: Leave: leave Summary by Employee

Overview: A detailed summary for each employee which shows the leave booked for your

Leave Summary/Remaining Report by Employee from 1/01/2014 to 31/12/2014
Printed on: 26/02/2014 at 11:58:09
Selection: Lee McGann

Employee No: T01 **Name : McGann, Lee**

From Date	To Date	Application Date	No of Days
2/01/2014	3/01/2014	16/01/2014	0.00 Compassionate
19/02/2014	19/02/2014	19/02/2014	0.00 Sick
17/03/2014	18/03/2014	16/01/2014	0.00 Study
6/05/2014	9/05/2014	16/01/2014	4.00 Holiday Paid
2/06/2014	6/06/2014	16/01/2014	5.00 Holiday Paid
28/07/2014	31/07/2014	16/01/2014	4.00 Holiday Paid
19/08/2014	20/08/2014	16/01/2014	0.00 Training
12/10/2014	17/10/2014	16/01/2014	0.00 Training

Leave Entitlement:	20
Leave Taken To Date:	13.0
Leave Booked Total:	13
Entitlement Remaining:	7

Name: Employee - Name List Report by Employee

Overview: This report will list all the employees currently in the Eco Time system along with their clocking number.

Contact Details

If you experience any problems, please log a support request at **http://ticket.timepg.com**