### **Paycor Time**

Client Learning | Participant Guide



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### Welcome

We are excited to have you in the Paycor Time class today. A few items to keep in mind throughout the training:

- Questions can also be typed in the chat window
- The demo environment may differ from your system, but the functionality is the same





Agenda

- Overview of Paycor Time Key Concepts
- Policy Review and Editing
- Employee Profile with Timecard Views and Editing
- Using the Time Dashboard
- Importing to Payroll

# Key Concepts

- Overtime: Applies to non-exempt employees only. Paycor Time will show you the employees who are approaching overtime.
- Holidays: Not all companies observe the same holidays. Some even have personal holidays that are separate from company holidays.
- Rounding: This is a cushion when it comes to clocking in and out. For example, if someone's shift starts at 8, the clock will allow the person to be "on time" between 7:55 and 8:05.
- Breaks and Meals: Determined by Employer.
- Shift Premiums: Different pay based on time.
  - Example: 3rd shift, 2nd shift, or weekends.
  - Wage might be a higher dollar amount, or it could be time and a half.





# Policy Review and Editing

Menu Selections to Access: Company > Configure Company



- Hours Exclusion: Select Earning Codes for which hours should be sent to payroll. By default, all earning codes are selected.
- Holiday Policies: Company holidays listed here. Click +Add Policy to add a new Holiday policy.
- Meal Policies: This section allows you to set up policies for meal breaks.
- Overtime Policies: The system allows you to have several different types of overtime policies.
- Rounding Policies: Set policies that allow employees to log in early or late and round to the nearest hour.
- Punch Settings: Restrict IP addresses, create badges and PIN numbers for new employees.
- Time Card Exceptions: Define exceptions that can be applied to a Time Card as Critical or non-Critical.
- Time Card Approvals: Add verbiage to a Time Card for approval and who needs to approve the Time Card.
- **Premiums:** Provides guidelines for how premium pay should be applied.
- Clock/Clock Groups: Check to see if a Clock is offline. Create Groups for Clocks.
- Unassigned Punches: Show punches from Clocks, Employee Self-Service, and Mobile Devices that are unable to be processed. This screen is read only, and edits are to be made on the Time Card.
- Mobile Punch Locations: Allows Geo-Validation to track where punches are made from a mobile device.

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Employee Profile - Time Card Views

Menu Selections to Access: Employees > Manage Employees > Employee Name > Time and Attendance

- Accrual Activity: Displays hours for benefit accrual plans like vacation and sick time.
- Accrual Setup: Allows benefit plans to be set up for the employee.
- Work Schedule: Set the number of hours per pay period to populate the paygrid. Not to be used for employees who use punches to track their time.
- Employee Security: Set security preferences for:
  - o Badge and PIN numbers
  - Clock passwords
  - Clock access
  - o Employee punch preferences
- Time Card: View employee punches, view, clear any exceptions, and approve the Time Card.
- Pay Policies: Displays which policies are applied to the individual employee.

Menu Selections to Access: Employees > Manage Employees > Employee Name > Time and Attendance > Time Card

- Daily Details: Displays Time Card details by pay period or week.
- **Project Time Sheet**: View or enter hours for different departments or labor codes the employee has worked in for the pay period.
- Bulk Entry: Allows hours to be input at one time as opposed to daily punches. The **tab key** quickly moves you from one field to the next.
- Mobile Punch Map: Map shows locations of punches when using Geo-Validation.





Employee Profile - Time Card Editing

Menu Selections to Access: Employees > Manage Employees > Employee Name > Time and Attendance > Time Card > Daily Details

To Add or Edit Punches, Add Hours or Add Other Pay simply select the +Add button on the day you wish to make updates. When complete make sure to click Save.

#### Time Dashboard

Menu Selections to Access: Employees > View Time Dashboard

- Current Employee Status: View who punched in for the day, who is out on break or lunch, who has left, and who is absent for the selected client and paygroup.
- Approaching Overtime: Use this widget to help control labor costs be viewing which employees are quickly approaching overtime for the week.
- Time Card Exceptions: Quickly view which employees have missing punches or other time card exceptions that need to be resolved for the current pay period. Any exceptions acknowledged on the timecard will not display here.
- Approvals: View each employee's hours for the previous pay period. Approve the time card hours without having to go through each employee individually.

The **Approve All** button may be setup on the Time Card Approvals page. This allows a user to approve all employees that are shown on the Time Dashboard if they do not have critical errors.



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## Importing to Payroll

Follow these steps to import payroll:

- 1. Select from the menu **Company > Review Time**.
- 2. Locate the payroll you want to review. If there are any outstanding critical exceptions or unapproved timecards on the payroll, resolve those issue before submitting.
- 3. After reviewing employee hours, other pay, and critical errors click Lock Time Cards. Locking time cards will prevent any further time card edits for this payroll period.
- 4. Select Company > Pay Employees.
- 5. Locate the payrun and click **Begin**.
- 6. The Import Time window will appear. Confirm the desired date range and click **Import**.
- 7. Proceed to the **Successfully Imported** screen, review the file totals, imported totals, and difference columns.
- 8. Once the import has been confirmed and any warning or errors have been corrected, click **Finish**.

### Additional Resources

For additional information on Perform Time:

• Click the **Get Help** link located in the upper right-hand corner of most screens to access the Knowledge Base.

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• Contact your Paycor Representative with any questions you may have.



