



## **Version 12.0**

# Table of Contents

<b>1</b>	<b>Logging into evoClock+</b>	<b>4</b>
1.1	Logging In.....	4
<b>2</b>	<b>Navigating evoClock+</b>	<b>5</b>
2.1	The Home Tab.....	5
2.2	The Information Pane.....	5
2.3	Navigating to Other Tabs.....	6
2.4	Viewing your own Timecards, Leave Requests and Profile.....	6
2.5	Applying a Filter to your List of Employees.....	6
2.6	Accessing Help.....	7
<b>3</b>	<b>Setting your User Preferences</b>	<b>7</b>
3.1	Changing your Password.....	7
3.2	Changing the Number of Records Displayed Per Page.....	7
3.3	Disabling the Confirm Save Pop-Up Message.....	7
3.4	Configuring the Timecard Display.....	8
<b>4</b>	<b>Employee Profile Maintenance</b>	<b>8</b>
4.1	Entering in a New Hire.....	8
4.2	Setting up a User Account.....	11
4.3	Terminating/Inactivating an Employee.....	11
4.4	Rehiring/Re-Activating an Employee.....	11
4.5	Maintaining Employee HR Information.....	12
<b>5</b>	<b>Timecards (Non-Exempt Employees)</b>	<b>12</b>
5.1	Viewing/Editing Punch Timecards.....	12
<b>6</b>	<b>Other Timecard Functions</b>	<b>14</b>
6.1	Adding Miscellaneous Pay on a Timecard.....	14
6.2	Overriding Holiday Pay on a Timecard.....	14
6.3	Printing/Emailing/Downloading a Timecard.....	15
6.4	Viewing Calculation Details.....	15
6.5	Viewing the Timecard Audit Trail.....	16
6.6	Configuring a Timecard Proxy.....	16
<b>7</b>	<b>Leave Requests</b>	<b>16</b>
7.1	Entering a Leave Request on Behalf of an Employee.....	16
7.2	Approving/Denying Leave Requests.....	17
7.3	Editing a Leave Request.....	18
7.4	Viewing Time Off on the Leave Request Calendar.....	18
<b>8</b>	<b>Reports</b>	<b>18</b>

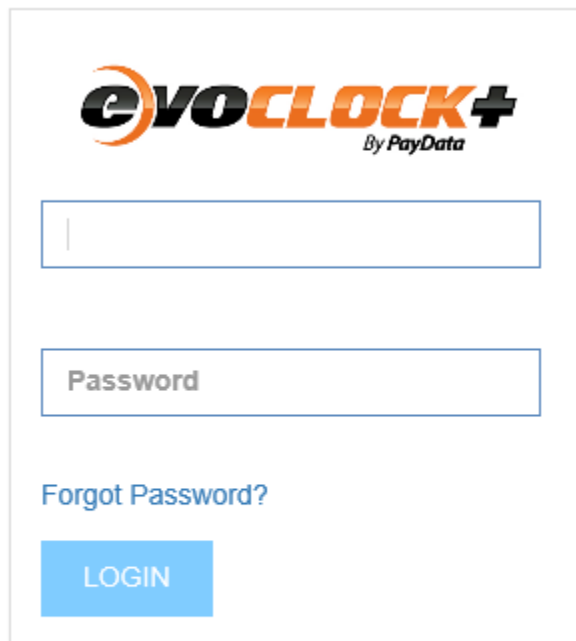
8.1	Running a Report.....	18
<b>9</b>	<b>Schedules</b> _____	<b>19</b>
9.1	Entering in an Employee’s Schedule.....	19
<b>10</b>	<b>Holiday Calendar Maintenance</b> _____	<b>20</b>
10.1	Adding New Holidays to the Existing Holiday Calendars....	20
<b>11</b>	<b>Accrual Balance Maintenance</b> _____	<b>21</b>
11.1	Increasing an Accrual Balance.....	21
11.2	Adjusting an Accrual Balance.....	21
<b>12</b>	<b>Payroll Processing</b> _____	<b>22</b>
12.1	Pre-Processing Best Practices.....	22
12.2	Lock the System (Optional).....	22
12.3	Un-Lock the System (Optional).....	22
12.4	Close Payroll (Optional).....	23

# 1 Logging into evoClock+

## 1.1 Logging In

- Open up your web browser and navigate to the following URL:
  - **ENTER SITE URL HERE**
- Type your Login ID and Password that has been provided to you, and then click the Login button. Login IDs are not case-insensitive but passwords are case-sensitive.
- Please change your password after you log in for the first time.

---



The screenshot shows the login interface for evoClock+. At the top is the logo 'evoCLOCK+' with 'By PayData' underneath. Below the logo is a text input field for the login ID. Underneath that is a password input field with the placeholder text 'Password'. Below the password field is a link for 'Forgot Password?'. At the bottom of the form is a blue 'LOGIN' button.

©2012, AsureForce. AsureForce is a registered trademark.

## 2 Navigating evoClock+

### 2.1 The Home Tab

When you log into evoClock+, you will be taken to your Home tab. The Home tab will display all of the employees you have access to. From this page, you can access employees' schedules, profiles and timecards. Note: Some of these options might not be available to you based upon your site setup.

Here are some important features on this page:

- To search for an employee in the list, drop-down the Search On field at the top of the list and choose to search by either Employee Name or Employee ID. Enter your search criteria in the Find Employee field and click on Go.
- To view employees whose last names begin with a certain letter of the alphabet, use the alphabet bar at the bottom of the page. To return to the list of all employees, click on All on the alphabet bar.
- If you have more than one page of employees, you can navigate to the next page, by clicking on the right arrow in the bottom right-hand corner of the employee list.
- To view/edit schedules, click on the Edit button to the right of the employee's name under the Schedule column.
- To view/edit profiles, click on the Edit button to the right of the employee's name under the Profile column.
- To view/edit timecards, click on the Edit button to the right of the employee's name under the Timecard column.
  - The timecard will open to the current pay period. If you wish to view a different pay period, then choose a date from the Pay Period Select field in the upper left-hand corner of the list and then click on the Edit button.

### 2.2 The Information Pane

On the Home tab, there is a section labeled Information on the left side of the page. To view this section, click on the link, "Click here to view this section". Note: This section may take a few minutes to load.

In this section, you can view:

- How many leave requests are currently pending approval for the current pay period.
- How many employees have late arrivals, early departures, absences and missed punches for yesterday and today. Note: Missed Punches do not include missed punches for today.
- How many timecards are pending approval for the current pay period and the prior pay period.

## 2.3 Navigating to Other Tabs

To navigate to other tabs, click on a tab on the main menu bar. Some tabs will have sub-menus directly underneath the tab.

Below is a list of available tabs. Note: The tabs that you have access to might vary based upon what your product is licensed for.

- Profile: Allows you to view your employees' profiles.
- Schedules: Allows you to enter in a schedule for an employee.
- Timecards: This tab will allow you to view, edit and approve timecards.
- Accruals: From this tab, you can view your employees' accrual balances.
- Points: View and edit point infractions from this tab.
- Leave Requests: View, edit and approve leave requests from this tab. You can also view all of your employees' leave requests on a calendar.
- Reports: Generate and customize reports.
- Messages: Post messages to employees from this tab.

## 2.4 Viewing your own Timecards, Leave Requests and Profile

- From the Home tab, you can access your own profile, schedule, timecard and leave requests.
- In the upper right-hand corner of the Home tab, you have the following options:
  - My Profile
  - My Time Card
  - My Leave Request

## 2.5 Applying a Filter to your List of Employees

- From the Home tab, in the upper right-hand corner, click on the Filter button.
- In the window that opens, you can filter your list of employees by any of the following options:
  - Supervisor (only available if you have been assigned the Employee Type of Manager)
  - Pay Group
  - Shifts
  - Hierarchy (you can choose to filter by any level of the hierarchy by dropping down the Level menu)

- Check the boxes next to the items you would like to include in your filter.
- Click Save at the top of the window. Note: Your filter will apply to all pages until such time as you log out of the system.
- To clear a filter, go back to the Filter window and click on the Clear Filter button at the top of the window.

## 2.6 Accessing Help

You can access Help Documentation from any page within the evoClock+ system by clicking on the “Help On This Page” button in the upper right-hand corner of the site. The Help Documentation will automatically show you help information for the page that you are on.

# 3 Setting your User Preferences

## 3.1 Changing your Password

- Click on the Preferences button in the upper right-hand corner of the site.
- In the window that opens, under the Change Password section, type in your current password once and your new password twice.
- Click OK at the bottom of the page.

## 3.2 Changing the Number of Records Displayed Per Page

By default, when viewing a list of employees, you will see 17 employees displayed per page. You can change this setting to a value between 1 and 50.

- Click on the Preferences button in the upper right-hand corner of the site.
- In the window that opens, under the “Set the number of records on each page” section, type in a value between 1 and 50.
- Click OK at the bottom of the page.

## 3.3 Disabling the Confirm Save Pop-Up Message

By default, when you navigate from a page to another page without saving or if you log out of the system without saving, you will receive a pop-up warning message. If you prefer to disable this warning, follow these steps:

- Click on the Preferences button in the upper right-hand corner of the site.
- In the window that opens, under the “Set the confirmation options” section, switch the “Confirm save on exit/change” option to No.
- Click OK at the bottom of the page.

## 3.4 Configuring the Timecard Display

You can pick and choose which sections on a timecard are expanded or collapsed by default when opening a timecard. In addition, you can disable certain hours summary fields so they do not show in the Hours section of a timecard.

- Click on the Preferences button in the upper right-hand corner of the site.
- In the window that opens, click on the Time Card tab at the top of the window.
- To collapse certain sections of a timecard so they do not display by default when opening a timecard, change the option to Collapsed. Note: When a section is collapsed on a timecard, you can manually expand it by clicking on the Plus (+) button on that section on the timecard.
- To disable certain hours summaries in the Hours section of a timecard, switch the option to Hide.
- Click OK at the bottom of the page.

# 4 Employee Profile Maintenance

## 4.1 Entering in a New Hire

New hires will need to be entered into the EVOLUTION system. Once entered, the new hire will be brought into evoClock+ (this process can take upwards of 2 hours).

When entering a new hire, you MUST have the following information entered or else the employee will not synch with evoClock+:

- A Card Number must be entered. The Card Number will be used to identify the employee on the clock. Even if the employee is not going to punch on a clock, you must enter a Card Number (you can just repeat the Employee ID number in this scenario). The clock number is added in Evolution on the *Details Tab* in the *Time Clock Number* field.
- A supervisor must be assigned.
- Default Labor Distribution 1-2 on the Organization tab must be assigned as well as a Position Code on the Assignment tab.



- The Exportable to Time System box must be checked on the Compensation tab.
- Tier 7 must be assigned on the Organization tab (this field would correspond to the pay group assignment in evoClock+).
- An accrual group must be assigned if the employee is NOT eligible for accruals (for example, a part time employee). The accrual group is assigned AFTER you have entered in the new hire. Once the new hire is entered, go to Employee on the main menu bar and click on HR Details and then choose ADI Accrual Group Detail. On this page, you can assign the employee to the NOACC (No Accruals) accrual group.

Once the new hire process has been completed in EVOLUTION and the new hire has synced with EvoClock+, you will need to complete some additional steps before the new hire can use the system.

- Click on the Profile tab in the main menu bar.
- Double-click on the employee's name in the list.
- **General Tab**
  - **Schedule Mode:** There are four options in regards to assigning a schedule to an employee:
    - **None:** Choose this option if you would not like to assign a schedule to an employee. One can either be added manually each week for the employee or no schedule can be entered at all.
    - **Master Schedule:** A Master Schedule is pre-set schedule that you can assign to the employee (for example, Monday thru Friday, 8am to 5pm). Once you create a Master Schedule, you can assign it to the employee and the system will use that Master Schedule to automatically build the employee's schedule each week.
    - **Rotation Schedule:** Rotation Schedules allow you to rotate Master Schedules. For example, you can have two Master Schedules where an employee works every other Friday. This field will only appear if Rotation Schedules have been enabled.
    - **Use Department Schedule:** Schedules can be assigned to a department in Hierarchy Manager (Configurations > User Parameters). Select this option if you want the system to build the employee's weekly schedule based upon the schedule that assigned to the employee's department. This field will only appear if Departmental Schedules are enabled.
- **Access Tab**
  - **Setting up a Supervisor:** In this scenario, a supervisor will have access to their own information but will also have access to other employees (which you will define).
    - Select Supervisor as the Employee Type.
    - **SAVE THE PROFILE AT THIS POINT BY CLICKING ON SAVE AT THE TOP OF THE PROFILE WINDOW.**
    - If you would like the supervisor to receive an email whenever an employee submits a leave request to them, click on the Select Recipients button next to

the Email ID field. In the window that opens, click on Add and enter in the email address of the supervisor. Click OK and then click OK once more.

- Click on the Select button next to the Security Access field.
  - In the window that opens, on the Assignable Hierarchies tab, select the hierarchy levels that the supervisor could *potentially* be assigned to. Note: This tab does not determine which employees the supervisor will have access to; it just determines which levels the supervisor can potentially be assigned to. If you wish to set up Assignable Hierarchies using a different level of the hierarchy (such as Departments), drop-down the Level field at the top of the window and choose a different level of the hierarchy.
  - On the Role tab, select Default Supervisor. (Note: Depending upon your system setup, this role might be renamed or there might be additional custom Supervisor security roles that you can choose).
  - On the Access tab, select **All** and check the box labeled **Limit to Employee Assigned Supervisor:**
- **Setting up an Administrator:** Typically an Administrator will have access to all employees and will have the ability to setup, configure and maintain the website. In addition, administrators can also be assigned to an employee as their supervisor.
- Select Supervisor as the Employee Type.
  - **SAVE THE PROFILE AT THIS POINT BY CLICKING ON SAVE AT THE TOP OF THE PROFILE WINDOW.**
  - If you would like the administrator to receive an email whenever an employee submits a leave request to them, click on the Select Recipients button next to the Email ID field. In the window that opens, click on Add and enter in the email address of the administrator. Click OK and then click OK once more.
  - Click on the Select button next to the Security Access field.
  - In the window that opens, on the Assignable Hierarchies tab, select the hierarchy levels that the administrator could *potentially* be assigned to. Typically, you would select all hierarchy levels when setting up an administrator. Note: This tab does not determine which employees the administrator will have access to; it just determines which levels the administrator can potentially be assigned to. If you wish to set up Assignable Hierarchies using a different level of the hierarchy (such as Departments), drop-down the Level field at the top of the window and choose a different level of the hierarchy.
  - On the Role tab, select Default System Administrator. (Note: Depending upon your system setup, this role might be renamed or there might be additional custom Administrator security roles that you can choose).
  - On the Access tab, select **All**.

- **Personnel Tab**
  - **Holidays:** Select this check box if the employee is eligible to receive holiday benefits as defined by his or her pay group. Note that if this field is not selected, the Holiday Rule will not apply; the employee will not be paid nor accrue benefit time.
- **Click Save at the top of the page to finish the process.**

## 4.2 Setting up a User Account

A User Account is an account that is not tied to a particular employee. For example, you can create a User Account called Payroll Manager that is not attached to any employee profile.

- Click on the Configurations tab on the main menu bar.
- Click on Administration on the sub-menu and then choose User Manager.
- Click on New User in the upper right-hand corner.
- In the window that opens, enter in a User ID and Name for the user.
- Choose your User Type (see section 4.1 for an explanation of the different User Types).
- If the user is going to be allowed to log into the evoClock+ site, check the “Web Enabled” box and enter in a Login ID and Password.
- Click Save at the top of the window.
- Click on the Access tab and select what kind of access you’d like to assign to the user. See section 4.1 for an explanation of the different access options.
- Click Save at the top of the window.

## 4.3 Terminating/Inactivating an Employee

Terminations will need to be processed in the EVOLUTION system. Once terminated, the status of the employee will update in evoClock+ within the next 2 hours.

## 4.4 Rehiring/Re-Activating an Employee

Re-hires will need to be processed in the EVOLUTION system. Once re-hired, the status of the employee will update in evoClock+ within the next 2 hours.


## 4.5 Maintaining Employee HR Information




Other than the fields outlined in section 4.1, all HR changes will need to be processed in the EVOLUTION system. Once entered, the change will update in evoClock+ within the next 2 hours.


# 5 Timecards (Non-Exempt Employees)

## 5.1 Viewing/Editing Punch Timecards

To view and edit an employee's punches, follow these steps:

- You can access timecards in two different ways:
  - On the Home Tab, click on the View (or Edit) button under the Timecard column to the right of an employee's name.
  - Click on the Time Card tab and double-click on an employee's name in the list. If the employee time card you want to view/edit does not appear on the screen, you can locate it one of two ways:
    - Specify Search On criteria—click and choose employee name, employee ID number, or social security number. Enter the search string in the Find Employee box and click Go. **Note:** If you enter only the first few characters of a search string prior to clicking Go, all employees having those characters in the specified search are returned. This is useful for narrowing down search results if you do not enter a specific search string.
    - Using the alphabet-bar at the bottom of the screen, click the first letter of the employee's last name to return the time cards of employees whose last name starts with that letter. Click All to return all employee time cards.
- By default, the current pay period is displayed. If you need to enter data for a different pay period, click  and, on the pop-up calendar, choose the pay period. You may also use the arrow buttons to scroll pay periods.
- To edit an existing punch, simply type over a punch on a given day. Enter the time for the day by typing the hour, minutes, an **a** for AM or **p** for PM (e.g. 8a for 8:00 AM or 415p for 4:15 PM).
- To enter in a new punch, click the **Time In** box under the day for which you want to enter data. Enter the start time for the day by typing the hour, minutes, an **a** for AM or **p** for PM (e.g. 8a for 8:00 AM or 415p for 4:15 PM).  
If you are entering both the start and end times, type the end time in the Time Out box.  
**Note** - If a shift spans two days; for example, if an employee works from 11:00 PM on 11/14 to 7:00 AM on 11/15, you can enter both the In and the Out punches on 11/14 but you must change the date on the Out punch by double clicking on the punch and choosing 11/15 as the date in the window that appears.
- To delete a punch, right-click on a punch and choose Delete This Punch.

- To delete a set of punches (both an In punch and an Out punch), right-click on the In punch and choose Erase Punch Set.
- To insert a punch in between punches, right-click on the punch that you would like to insert a punch after and choose Insert Punch.
- Next to the punches, you will see a box which will display exception codes. Most exception codes are automatically filled in based upon rules that have been set up for your company (for example, early arrivals and late arrivals). Below is a list of common exception codes. Some of these exception codes might not be available depending upon your site setup. To enter an exception code manually, click  and in the pop-up dialog choose from the list of exception codes.
  - EA: Early Arrival
  - LA: Late Arrival
  - ED: Early Departure
  - LD: Late Departure
  - MP: Missing Punch
  - LB: Long Break
  - SB: Short Break
  - UB: Unscheduled Break
  - NS: Not Scheduled
  - AB: Absent
  - ME: Manual Entry
  - AS: Autopunch to Schedule (this punch has been added by the system based upon an employee's schedule).
- After entering data, click Save at the top of the timecard. The data you entered now appears in the Time Detail section of the screen.
- Use the Time Detail section to enter additional information:
  - **Exception Override Codes** – click the ellipse button (...) and in the pop-up box, choose the override code.
  - **Position** – to assign a hierarchy level (location, department, position, etc.) worked other than your home hierarchy levels, click  and in the pop-up box choose the hierarchy worked.
  - **Pay Type** – the default pay type is automatically displayed. To change the pay type, click  and in the pop-up box choose from the list of available pay types.
  - Activate the **Freeze Exception** feature by placing a check mark next to Frx Ex. For example, if an employee has missed a punch and has received an MP exception code, you can freeze the exception so that when you add the missing punch, the MP exception is not removed from the timecard.

- **Reason Code** – click the ellipse button (...) and in the pop-up box choose from the list of reason codes.
- **Jobs** – to select a job, click  and in the pop-up box select the appropriate job.
- **Comments** – enter comments specific to that day (or punch set).
- Click on Save at the top of the timecard when you are done making your changes.

## 6 Other Timecard Functions

### 6.1 Adding Miscellaneous Pay on a Timecard

You can enter Miscellaneous Pay adjustments for instances such as vacation time or jury duty.

- At the top of the timecard, click on the Misc Pay button.
- Click on Insert New Row.
- On the newly added line, enter in the date of the Misc Pay transaction.
- Drop-down the Pay Type menu and select a pay type from the list.
- If you chose an Hours code from the Pay Type list, enter in the number of hours under the Hours column. If you chose a Dollars code from the Pay Type list, enter in the dollar amount in the Amount column.
- By default, the Misc Pay will be allocated to an employee's home hierarchy (location, department, position, etc.). If you would like to allocate the Misc Pay to a different hierarchy other than the home hierarchy, click on the magnifying glass next to the Position column and choose your hierarchy levels in the window that appears.
- Choose an Exception Code under the Ex column (optional).
- Choose a Reason Code under the Rea column (optional).
- Enter in a comment, if needed, under the Comments column.
- Click Save at the top of the window.
- Click Save at the top of the timecard when you are finished.

### 6.2 Overriding Holiday Pay on a Timecard

Holiday pay will automatically be given to an employee if they are eligible to receive it. To remove the holiday or to change the amount of hours that have been given to the employee, follow these steps:

- At the top of the timecard, click on the Misc Pay button.

- Click on Insert New Row.
- On the newly added line, enter in the date of the holiday.
- Drop-down the Pay Type menu and select the holiday pay type from the list.
- To change the number of hours that has been given to the employee, type in the number of hours in the Hours column.
- To completely remove the holiday pay from the timecard, type in zero in the Hours column.
- Click Save at the top of the window.
- Click Save at the top of the timecard when you are finished.

### 6.3 Printing/Emailing/Downloading a Timecard

- Click on the Time Card tab.
- Double-click on an employee in the list to open their timecard.
- At the top of the timecard, click on Timesheet Report.
- In the window that opens, you can do the following:
  - Print the timecard by clicking on the Printer icon in the upper left-hand corner.
  - Email the timecard by clicking on the Enveloper icon in the upper left-hand corner.
  - Download the timecard by either clicking on the Excel icon (this will download the timecard as an XLS file) or by clicking on the CSV icon (this will download the timecard as a comma-separated file).

### 6.4 Viewing Calculation Details

Calculation Details allows you to view the calculations that the system is applying to the timecard. It will show you the punches, any lunch deductions as well as what rules are being applied to the timecard.

- Click on the Time Card tab.
- Double-click on an employee in the list to open their timecard.
- At the top of the timecard, click on Window and then choose Hours Calculation. Alternatively, you can also just hit F7 on your keyboard to bring up the Hours Calculation window.

## 6.5 Viewing the Timecard Audit Trail

All changes made to a timecard are recorded in an audit log. The audit log will show you all additions, deletions and edits that were made to the timecard. You can see who made the change, the date and the time of the change and what the “before” value was and what the “after” value was.

- Click on the Time Card tab.
- Double-click on an employee in the list to open their timecard.
- At the top of the timecard, click on Action and then Audit.

## 6.6 Configuring a Timecard Proxy

Administrators and supervisors can delegate time card review/edit/approval rights to other supervisor(s) using the **Configure Proxy** option.

- Click on the Time Card tab.
- Click on Configure Proxy on the submenu.
- Click on New Proxy in the upper right-hand corner of the page.
- In the Supervisor field, choose the supervisor you wish to assign a proxy to.
- In the proxy field, choose the name of the proxy for the supervisor. Note: Proxies must be either supervisors or administrators within evoClock+.
- Enter in a start and end for the proxy period.
- Choose whether you would like the proxy to either view, edit or approve timecards.
- Click Save and Close at the top of the window.

# 7 Leave Requests

## 7.1 Entering a Leave Request on Behalf of an Employee

If you prefer to enter in a Leave Request on behalf of an employee rather than enter the hours directly onto their timecard, follow the steps below. This method will allow you to view the leave hours on the Leave Request Calendar whereby entering the hours directly onto the timecard will not.

- Click on the Leave Request tab in the main menu bar.
- In the upper right-hand corner of the page, select New Leave Request.



- Click on the magnifying glass next to the Employee field and select the name of the employee that you wish to enter in a leave request for.
- Enter in the dates of the leave. Choose Skip Weekends if the dates you enter span a weekend and you do not wish to request time off on those days. Choose Skip Holidays if the dates you enter span a holiday and you do not wish to schedule time off on that day.
- Click on the magnifying glass next to the Pay Type field to select the type of time off that you are requesting. Click on the magnifying glass next to the Reason field to select a reason for your time off (choose NONE if there are no reason codes listed).
- Enter in the number of hours per day that you are requesting. If you prefer to enter in Start and Stop times instead, you can check off the box labeled “Specific Time”.
- Click Save & Close when you are done.
- Next, you will need to approve the request (see the next section).

## 7.2 Approving/Denying Leave Requests

There are multiple methods to approve/deny leave requests.

### **Using the Information Pane**

- On the Home tab, there is section labeled Information on the left side of the page. To view this section, click on the link, “Click here to view this section”. Note: This section may take a few minutes to load.
- In this section, you will be able to view how many leave requests are still unapproved.
- You can click on the number of unapproved leave requests to go to the Leave Request List page (see below).

### **The Leave Request List Page**

- Click on the Leave Request tab in the main menu bar.
- You will now see a list of leave requests.
- This list will show you requests dated from today’s date to the end of the month, by default. To change the date range displayed, edit the start and end dates on the left side of the page and click on View.
- Select the request you wish to approve/deny by clicking on it in the list to highlight it. To choose multiple requests, hold down your CTRL key on your keyboard. To select all of the requests, check the box at the top of the list.
- To approve the requests, click on the Approve button at the top of the list.
- To deny the requests, click on the Deny button at the top of the list.

### **The Leave Request Calendar Page**

- Click on the Leave Request tab in the main menu bar.
- Click on Month on the sub-menu.
- You will now be viewing the Leave Request Calendar. Pending requests will have a checkbox next to them.
- To approve a request, check the box next to the employee's name on the calendar and click on Approve Checked.
- To deny a request, check the box next to the employee's name on the calendar and click on Deny Checked.

## 7.3 Editing a Leave Request

There are two methods to edit leave requests.

- Click on the Leave Request tab in the main menu bar.
- You will now see a list of leave requests.
- Double-click on a request in the list to open it.
- Make your edits and then click on Save at the top of the page. **Note: If the request was already approved, it will now need to be re-approved.**

## 7.4 Viewing Time Off on the Leave Request Calendar

- Go to the Leave Requests tab on the main menu bar.
- Click on Month on the sub-menu.

# 8 Reports

## 8.1 Running a Report

- Click on the Reports tab in the main menu bar.
- On the sub-menu choose a category of reports.
- Click on a report name in the list.
- Most reports will allow you to apply filters and a date range before you run it.
  - Level Filters: In this section, you can choose which hierarchy levels you would like to include on the report. Choose a level and then click on the Select button below.

Check the boxes next to the levels you would like to include on the report. Note: By default all levels will be included on the report.

- Employee Filters: Employee filters allow you to pick and choose which employees you would like to include on the report. By default, All Employees will be checked. To select employees, uncheck the All Employees box and click on the Select button that appears to the right. Check the boxes next to the employees you would like to include on the report.
- Date Range: Choose a date range for your report. You can use one of the pre-defined date ranges from the Custom drop-down menu or you can specify your own date range by choosing Specified.
- Filter Options: Click on the + sign to the far right of this section to expand it. This section allows you to apply additional filters to your report such as pay types or pay groups. Under the Field column, drop-down the menu and choose what you would like to filter on. In the Condition column, choose either Equals or Does Not Equal. Under the Value column, click on the magnifying and choose which values you would like to include on the report.
- Grouping Options: Click on the + sign to the far right of this section to expand it. In this section you can change how the report is grouped (and thereby subtotaled) and sorted.
- Click Run Report to run the report.
- Once the report is generated, you can do the following:
  - Print: Click on the printer icon in the upper right-hand corner to print the report.
  - Email: Click on the envelope icon in the upper right-hand corner to email the report to a recipient.
  - Download to Excel: Click on the Excel icon to download the report into Excel.
  - Download as CSV: Click on the CSV icon to download the report as a CSV file (comma separated file).

## 9 Schedules

### 9.1 Entering in an Employee's Schedule

- Click on the Schedule tab in the main menu bar.
- Double-click on an employee's name in the list.
- By default, the schedule for the current week is displayed. If you wish to view a different week, you can change the date at the top of the window and click Go.
- Under each day, enter in a start time and a stop time. Enter the time by typing the hour, minutes, an **a** for AM or **p** for PM (e.g. 8a for 8:00 AM or 415p for 4:15 PM).

- Note: If you need to enter in an overnight shift (a shift that starts on one day but end on the next day), then you will also need to drop-down the menus above where you enter in the start and stop times. From those menus, you will need to indicate the day of the start time and the day of the stop time. If you are not entering in an overnight shift, then you do not need to choose anything from these drop-downs.
- If you'd like, you can also enter in a lunch duration in the Brk field. If you prefer to schedule the lunch start and stop times instead, you can do so by entering the morning's start and stop times and then scroll down to the next section of start and stop times and enter in the times for the afternoon. For example: 8am to 12pm and then 1pm to 5pm.
- If you'd like to copy a schedule on one day to other days, place your cursor in any of the fields on the day you would like to copy. At the top of the window, drop-down the Fill menu and choose how many days you would like to fill. Click the Fill button. The system will copy that day to the subsequent days based upon how many days you chose to fill.

## 10 Holiday Calendar Maintenance

### 10.1 Adding New Holidays to the Existing Holiday Calendars

At the end of every year, you will need to make sure to add your new holidays to the existing holiday calendars.

- On the main menu bar, click on Configurations.
- Click on Rules on the sub-menu.
- Choose Accruals.
- Click on Accrual Group.
- Double click on the Default Accrual Group.
- At the top of the page, click on the Accrued Rules tab.
- Double click on one of the holiday rules.
- In the window that opens, you will see an option labeled "Accrual Awarded On". Click on that option.
- In the window that opens, enter in the month and the day of the holiday at the bottom of the window.
- Click OK when finished.
- Click Save and Close.
- Repeat the process for all of the other holiday rules.

# 11 Accrual Balance Maintenance

## 11.1 Increasing an Accrual Balance

- Click on Accruals on the main menu bar.
- Navigate to the employee and then double click their name to open the Accrual Summary screen.
- Click once on the accrual type to edit (so it is highlighted) then click Action\New Accrual.
- Enter the number of hours to increase in the Amount field. Enter the date that these hours are available in the Record Date field. Click the Use Expiration box if you want these hours to expire on a specific date if un-used. Enter comments if desired and then click OK.

## 11.2 Adjusting an Accrual Balance

- Click on Accruals on the main menu bar.
- Navigate to the employee and then double click their name to open the Accrual Summary screen.
- Click once on the accrual type to edit (so it is highlighted) then click Action\Accrual Transaction.
- Under Activity, select:
  - Expire Hours if you want to expire hours. Enter the hours amount, select the Record Date of when the hours are to be expired and then click OK
  - Use Hours if you want to reduce the number of available hours. Enter the number of hours to reduce, the Record Date, comments if desired and click OK
  - Set to if you want to replace the existing balance with a new accrual balance. Enter the new accrual amount, record date, comments if desired and click OK. This is useful if you want to reset the balance to 0 or to replace an existing balance of 24 hours to 16 hours.

## 12 Payroll Processing

### 12.1 Pre-Processing Best Practices

Before processing payroll, it is a good idea to make sure that all of the timecards and leave requests has been approved.

- Click on Timecards on the main menu bar.
- Click on Browse Approvals on the sub-menu.
- By default, this page will display timecards for the prior pay period. If you need to switch it to the current pay period, click on Approval Filter Options in the upper-right hand corner of the page and choose Current Pay Period.
- If any timecards appear on this page, they are still unapproved.
- **Note:** Timecards are not required to be approved in order to processed for payroll.
- Next, click on Leave Requests on the main menu bar.
- On the left side of the page, select Pending only and enter in the dates of the pay period you are processing. Click the View button.
- If any leave requests appear in the list, then they are unapproved.
- **Note:** Leave Requests MUST be approved in order to be processed for payroll.

### 12.2 Lock the System (Optional)

If you'd like, you can lock the system while you are processing payroll so that employees and supervisors cannot access the system. This prevents employees and supervisors from making changes to timecards while you are processing. This does not apply to administrators.

- Click on Configurations on the main menu bar.
- Click on System Settings.
- Check the box next to Lock System.
- Click Save at the top of the page.

### 12.3 Un-Lock the System (Optional)

If you locked the evoClock+ system in section 14.1, you will need to make sure you unlock the system once you have finished processing payroll.

- Log back into evoClock+.
- Click on Configurations on the main menu bar.
- Click on System Settings.
- Uncheck the box next to Lock System.
- Click Save at the top of the page.

## 12.4 Close Payroll (Optional)

Once you have finished processing your payroll, you can close the pay period. Closing the pay period essentially locks the timecards for the pay period so that no further edits can be made to the timecards (including by administrators).

- In evoClock+, click on Payroll on the main menu bar.
- Check the boxes next to all of your pay groups.
- Check the box labeled Close Payroll in the upper right of the page.
- A new checkbox will appear to left labeled “Process Unapproved Timecards”. Check that box.
- Underneath the “Process Unapproved Timecards” box, click on the Set Period button. Enter in the end date of the pay period that you processed and click OK.
- Next, click on the Run button next to the Set Period button. Wait until you receive a confirmation message.

