UCD Human Resources

CORE HR User Guide

CORE Time and Attendance - Flexi Clock Administration

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1 INTRODUCTION & OVERVIEW

1.1 INTRODUCTION

CORE HR is the Human Resources management information system used by UCD. CORE Time and Attendance is one of the modules within the CORE HR package, and it is used to support the administration of flexible working arrangements within some units of the University. A program of flexible working arrangements is commonly referred to as 'flexi-time'.

The UCD Human Resources Information Systems unit (HRIS) supports the implementation of CORE Time and Attendance while local nominated administrators are responsible for the regular administrative tasks required to maintain records for staff in their area.

In March 2014 in response to the Haddington Road Agreement the UMT signed off on a University Flex-Time Policy. This policy is now the only flexi-time policy in the University and replaces all other area policies from this time. A number of changes to the way the CoreTime system is configured and administered have been made and other changes will follow. These changes will ensure that the system can grow to meet the demand of new schools/units been added to CoreTime for the purposes of flexi-time and also simplify the duties of the local administrators.

1.2 RECENT CHANGES

A number of changes have been made to the CoreTime system in mid-2014. These changes remove some of the weekly and all of the monthly/yearly administration requirements for local area admins.

Sign off Hours and Pay Unapproved Absences is no longer a required step in the weekly administration.

All areas now operate on a single 4 week balance period so the monthly task of running the period end will now be done centrally by the HRIS team on the first Wednesday of the new 4 week period.

All Shift Types set-up are now cycle shifts and no longer need to be extended at the end of each year. Also as all area are on the same 4 week balance period this will be extended centrally by the HRIS team each year.

The number of pay codes has been reduced to simplify the weekly administration. In case where the reason for an absence is required or where a pay code that was used previously is no longer available the Approved Absence pay code should be used and a narrative added to the pay code by clicking on the day with the Approved Absence pay code and then pressing F3 or by right clicking and selecting narrative on the day. A number of other improvements will be made to the system over the remaining months of 2014.

1.3 OVERVIEW

1.3.1 SYSTEM OVERVIEW

Each employee records the hours that they have worked by clocking in via either Employee Self-Service (ESS) or a clocking machine. The hours are then stored on CORE Time and Attendance and Pay Codes are generated based on their working arrangements as set up in CORE Time and Attendance.

For example an employee on a 6.57 hour day who works for a total of 8 hours may see a Main Pay code for 6.57 hours and a Flexitime Plus code for 0.03 hours. This identifies that the employee was in the office for the 6.57 hours they were scheduled to be there plus an additional 0.03 hours which goes towards their flexi-time.

The local administrators role is to ensure that the employees hours are accurate and therefore that the codes generated by CORE Time and Attendance are correct.

1.3.2 ROLE DEFINITION

There are a number of aspects to an administrator's role as follows:

1. **Recording Leave**
   All leave should be notified to and recorded by the administrator once it has been approved. This includes Annual Leave, Flexi-Leave, Parental Leave etc. The process for recording leave can be found in Section 2.

2. **Weekly Administration**
   Each week the administrator must verify employee records to ensure that they are correct. **THIS MUST BE COMPLETED BY 9.30AM EVERY WEDNESDAY**. The process for this can be found in Section 3.

3. **Out of Course Amendments**
   Each week there is the possibility that amendments from previous weeks were not carried out. The Out of Course Amendments process facilitates the correction of these previous weeks and is detailed in Section 4.

4. **User Administration**
   The administrator must also ensure that any new employee to their area is set up correctly on CORE Time and Attendance. The process for this can be found in Section 5.

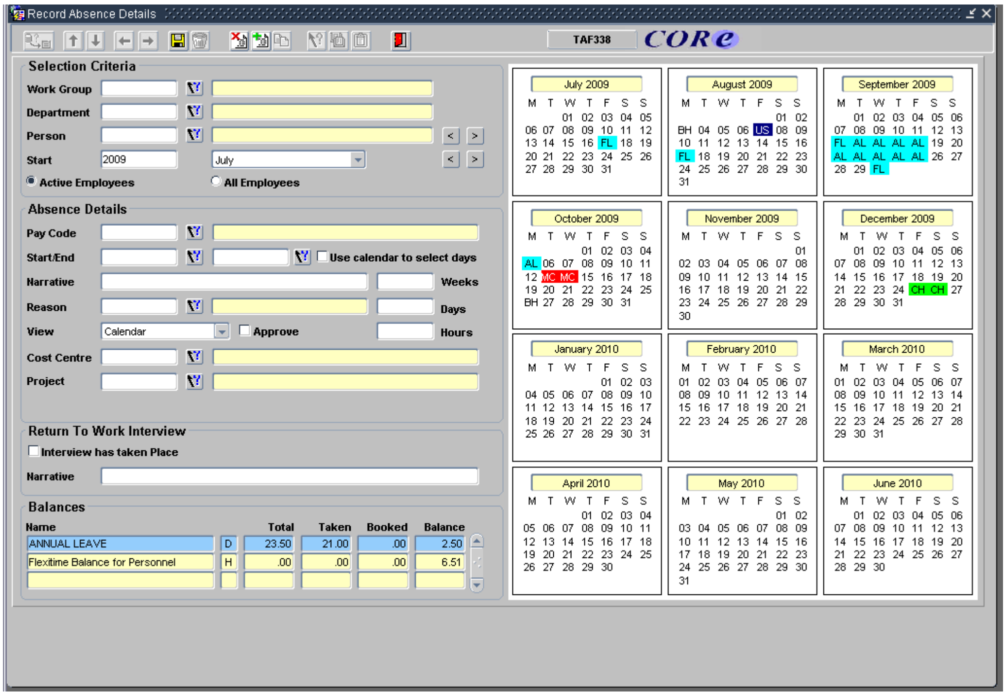
Some Flexi-Time Administrators may also be required to enter Sick Leave details into CORE Time and Attendance. All Sick Leave instructions will appear in the Sick Leave Administration manual and so will not be covered in this manual. Any queries regarding Sick Leave should be directed to either the UCD HR website (http://www.ucd.ie/hr/leave/sickleave/) or the Sick Leave mailbox within HR (e-mail sickleave@ucd.ie).

1.3.3 CORE Time and Attendance Screens

To enable the administrators to complete their role as efficiently as possible the following screens on CORE Time and Attendance should now be used.

1. Record Absence Details

The ***Record Absence Details*** screen can be found in CORE Time and Attendance under the **Time Mgt** menu. This screen provides details on all leave entered into CORE Time and Attendance and allows administrators to enter or amend leave for individual employees.



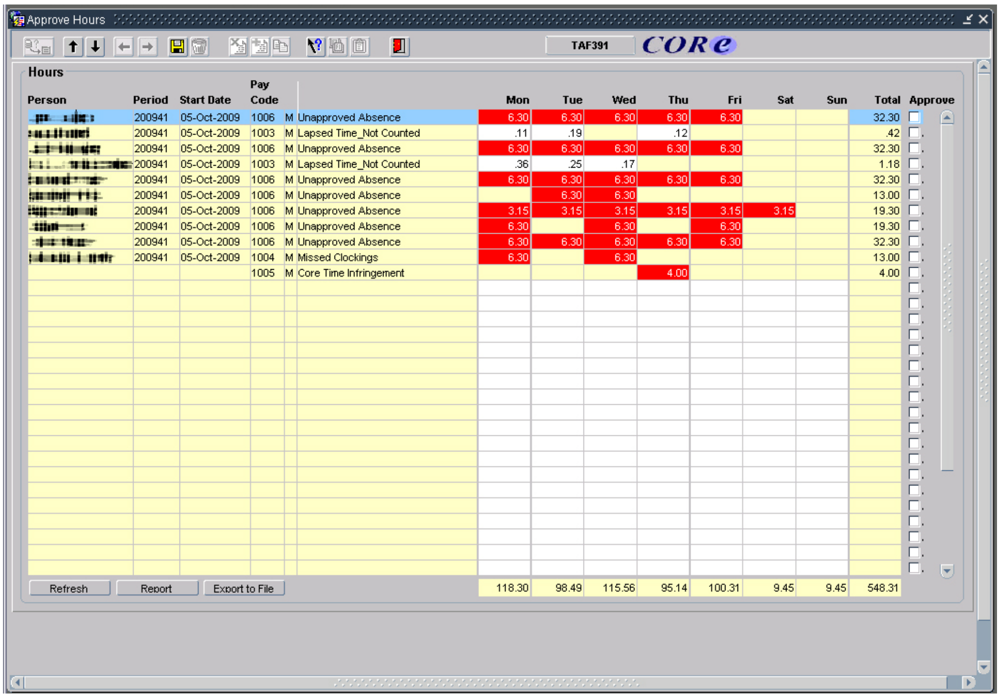
Screen 1.2.1: Record Absence Details screen.

- The *Selection Criteria* section allows the administrator to select the individual employee.
- The *Absence Details* section allows the administrator to enter absences or review them (when selected from the calendar on the right).
- The *Balances* section shows the Annual Leave and Flexi-Balance for the selected individual.

Details on how to use the ***Record Absence Details*** screen can be found in Section 2.2.

2. Approve Hours

The ***Approve Hours*** screen can be found in CORE Time and Attendance under the **Time Mgt** menu. It displays a list of all employees in an administrators group that have clockings that require either approval or amendment. All details in white merely require approval. All details in red require amendment.



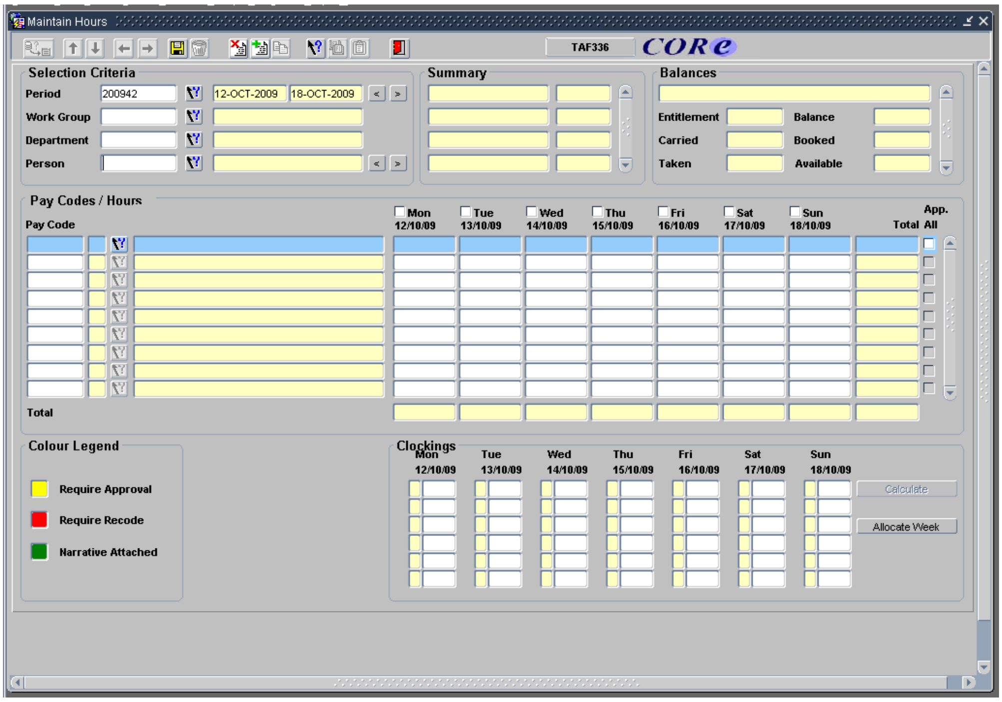
Screen 1.2.2: Approve Hours screen.

- To approve a row the administrator must click on the Approve tick box on the far right of the screen, then press the save icon.
- To amend or review a record double click on the row the record is on. This will bring you into the Maintain Hours screen.

Details on how to use the ***Approve Hours*** screen can be found in Section 3.2.2.

3. Maintain Hours

The ***Maintain Hours*** screen can be found in CORE Time and Attendance under the **Time Mgt** menu. This screen allows administrators to review and amend individual employees' clockings and Pay Codes.



Screen 1.2.3: Maintain Hours screen.

- The *Selection Criteria* section allows the administrator to select the individual employee.
- The *Summary* section contains summary information regarding the weeks hours.
- The *Balances* section shows balance information for Annual Leave and Flexi-Time.
- The *Pay Codes/Hours* section shows the calculated Pay Codes for each day.
- The *Clockings* section shows the hours entered for the employee for the week.

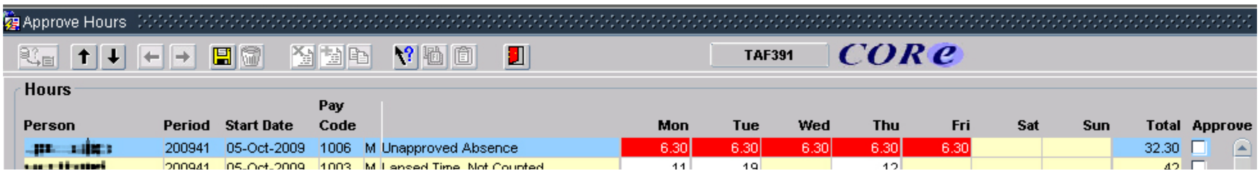
Details on how to use the ***Maintain Hours*** screen can be found in Section 3.2.3.

2 RECORDING LEAVE

2.1 OVERVIEW

The ***Record Absence Details*** screen allows administrators to enter leave details into CORE Time and Attendance in a user-friendly manner. This will update the employees hours, pay codes and relevant balances accordingly.

Wherever possible leave should be notified to administrators once it is approved and entered into CORE Time and Attendance immediately. This will mean that there will be fewer records requiring amendments on a weekly basis as all leave entered will be accounted for. For example if a employee takes a day of Annual Leave and does not notify the administrator it will appear as an *Unapproved Absence* on the ***Approve Hours*** screen during the weekly administration.

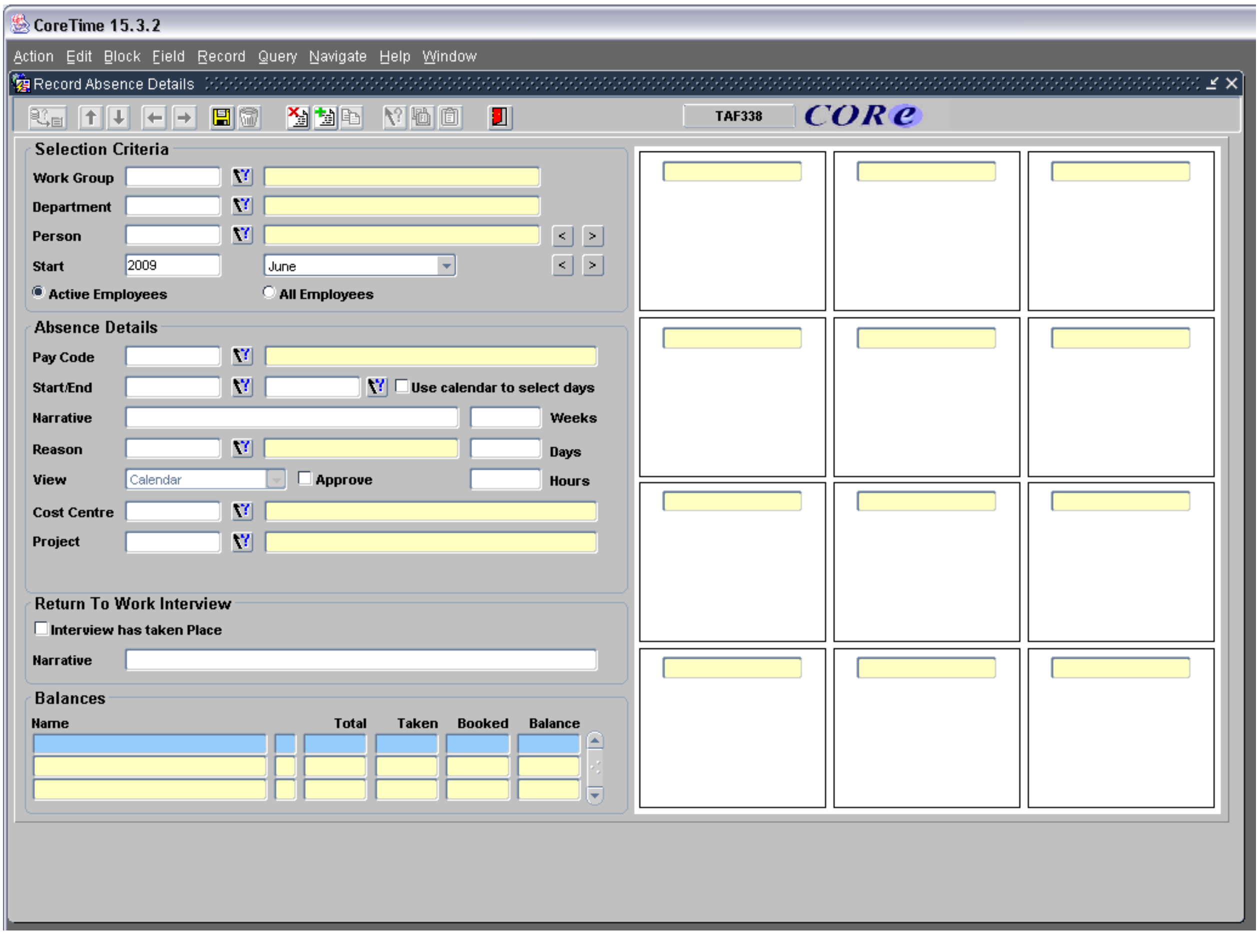


Screen 2.1.1: Approve Hours screen.

If the leave is entered prior to the weekly administration this row will not appear on the ***Approve Hours*** screen.

2.2 PROCEDURE FOR RECORDING ABSENCES

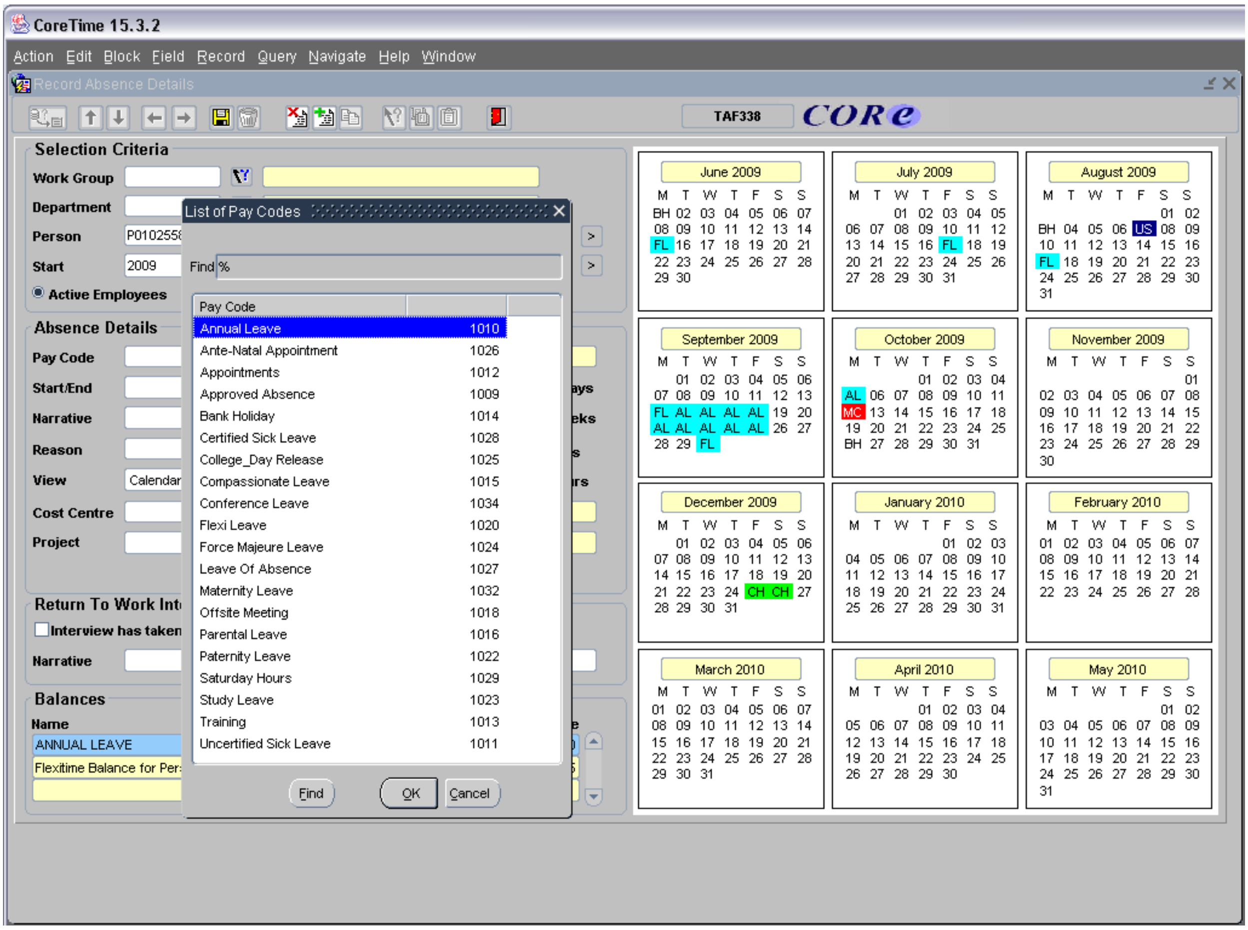
Absences must be recorded via the new ***Record Absence Details*** screen. To access this screen click ***Time Mgt*** in CORE Time and Attendance and select the ***Record Absence Details*** screen.



Screen 2.2.1: Record Absence Details screen.

Select the individual by either entering their Personnel Number or selecting them from the list of available values in the *Selection Criteria* section and then press the Tab button. Once this is done their existing leave appears on the calendar to the right.

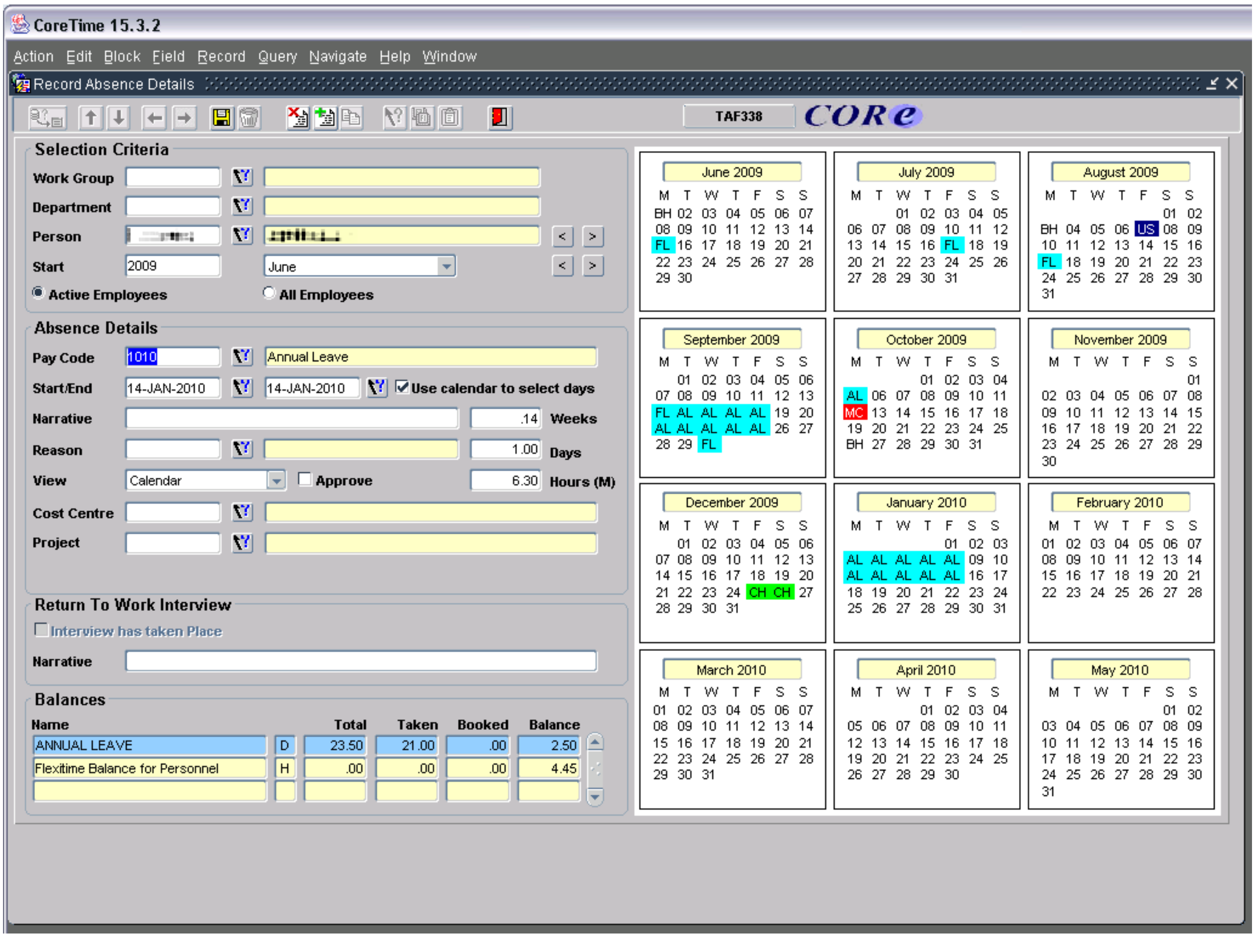
Next the Pay Code must be selected from the available list. The list has been reduced to include only the most commonly used codes (below is the complete list of codes). From this list select the relevant code, e.g. Annual Leave.



Screen 2.2.2: List of Pay Codes available to administrators.

To get a list of the Pay Codes and an explanation of each please see Appendix A. Whenever you are entering Sick Leave into CORE Time and Attendance you should refer to the Sick Leave manual. Once the Pay Code has been selected Tab to the *Start/End* date field.

The dates should be manually entered into the *Start/End* date fields below the Pay Code.



Screen 2.2.3: Entering leave via the Record Absence Details screen.

To enter a half-day the administrator must select the day in question and enter 0.5 in the *Days* field. Once all of the details have been entered click on the save button to finish recording the absence details. Once all absences have been entered exit the screen using the red door icon ().

3 Weekly Time and Attendance Administration

3.1 Overview

The weekly administration of CORE Time and Attendance has the following steps:

1. **Record All Absences** *(sick leave, annual leave, flexi-leave, parental leave etc)*
2. **Identify Records Requiring Amendment** *(this will highlight only records that need to be maintained)*
3. **Amend Records** *(for those that require maintenance)*

ALL OF THESE STEPS MUST BE COMPLETED BY 9.30AM EVERY WEDNESDAY. CORE Time and Attendance can no longer facilitate rolling the clock back and so any later amendments will be the responsibility of the individual administrator. Details on how to process these appear in Section 4.

3.1.1 Definitions

The above steps can be defined as follows:

Record All Absences
This step involves entering all leave into the system for the current week that has not already been entered. **Planned leave such as Annual Leave should be communicated to the administrator and entered into the system once it is approved** as per Section 2 above. However any leave taken during the week that has not been entered into the system must be entered before proceeding to the next step. This will reduce the number of records requiring amendments on the **Approve Hours** screen.

Instructions on how to complete this step can be found in Section 3.2.1.

Identify Records Requiring Amendment
This step will highlight to the administrator all employee records that require amendments for reasons such as missed clockings or time infringements (where the employee is not clocked in for the duration of their core hours). Each of these will need to be amended before the week can be signed off.

Instructions on how to complete this step can be found in Section 3.2.2.

Amend Records
This step will facilitate the administrator correcting all outstanding employee records to ensure that they can be signed off. If at this point leave is brought to the administrator's attention they will need to follow the Record All Absences procedure set out in Section 3.2.1.

Instructions on how to complete this step can be found in Section 3.2.3.

3.1.2 Pre-requisites

Before beginning the weekly administration the following is required:

1. Any pre-planned leave should be entered into CORE Time and Attendance as per the instructions in Section 3.2.1.
2. Any leave not entered into CORE Time and Attendance should be notified to the administrator.

3.1.3 Weekly Checklist

Weekly Administration Checklist

****
** PLEASE NOTE THAT ALL ADMINISTRATION MUST BE COMPLETED BY **
** CLOSE OF BUSINESS EVERY TUESDAY **
****

1	**Record Absences**	
1.1	Collect all Absences for the week	☐
1.2	Enter all Absences into Record Absence Details screen	☐
2	**Identify Records Requiring Amendments**	
2.1	Approve the entries in white on Approve Hours screen	☐
2.2	Collect all hours for remaining amendments	☐
3	**Amend Records**	
3.1	Update all records requiring amendments	☐

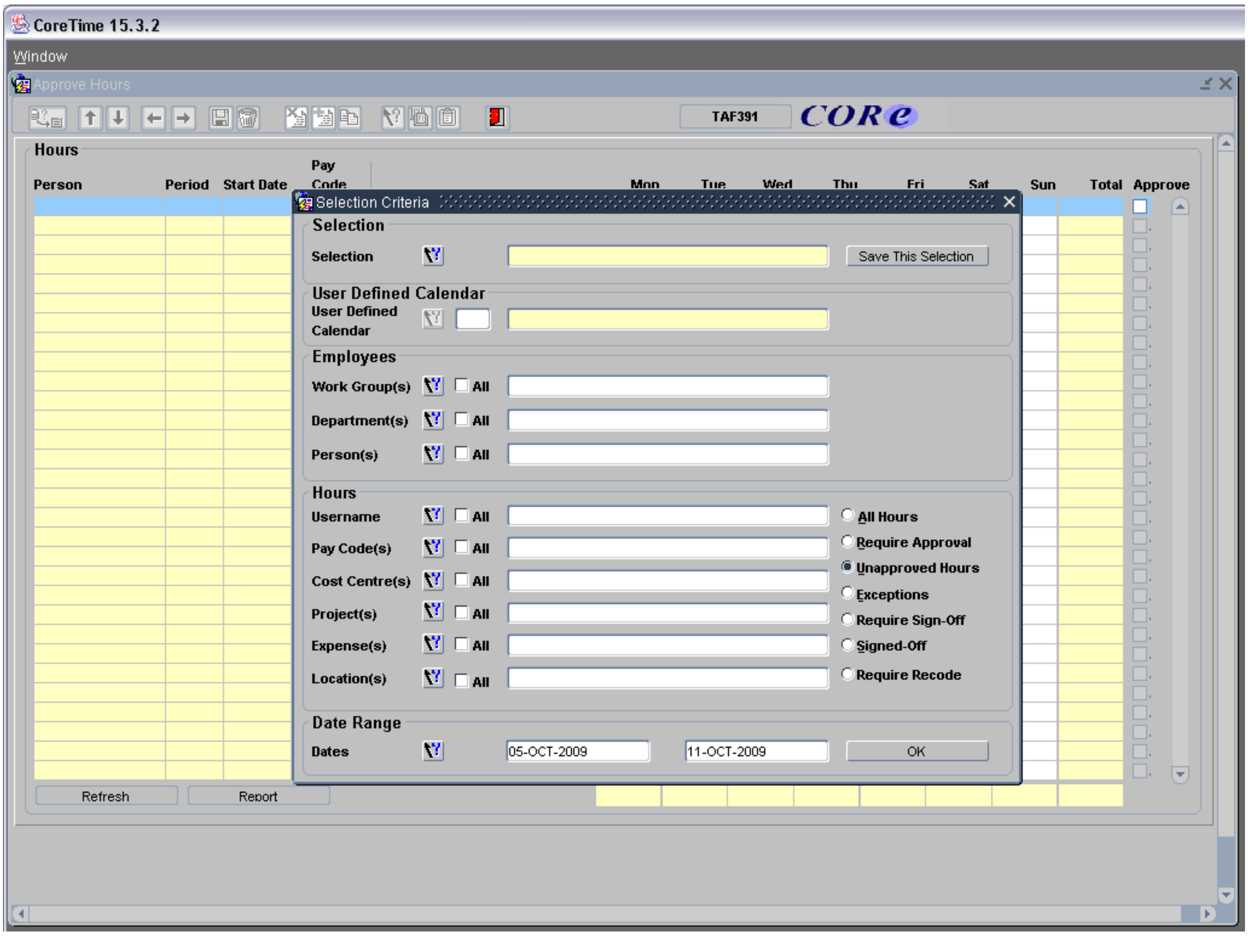
3.2 PROCEDURES FOR WEEKLY TIME AND ATTENDANCE ADMINISTRATION

3.2.1 RECORDING ABSENCES

The first step in the weekly procedures is to enter all of the absence details into CORE Time and Attendance that have not already been entered. Absences include sick leave, annual leave, flexi-leave and parental leave. All absences should be notified to the administrator before beginning the weekly sign-off. Details of how to record absences can be found in Section 2.2.

3.2.2 IDENTIFY RECORDS REQUIRING AMENDMENT

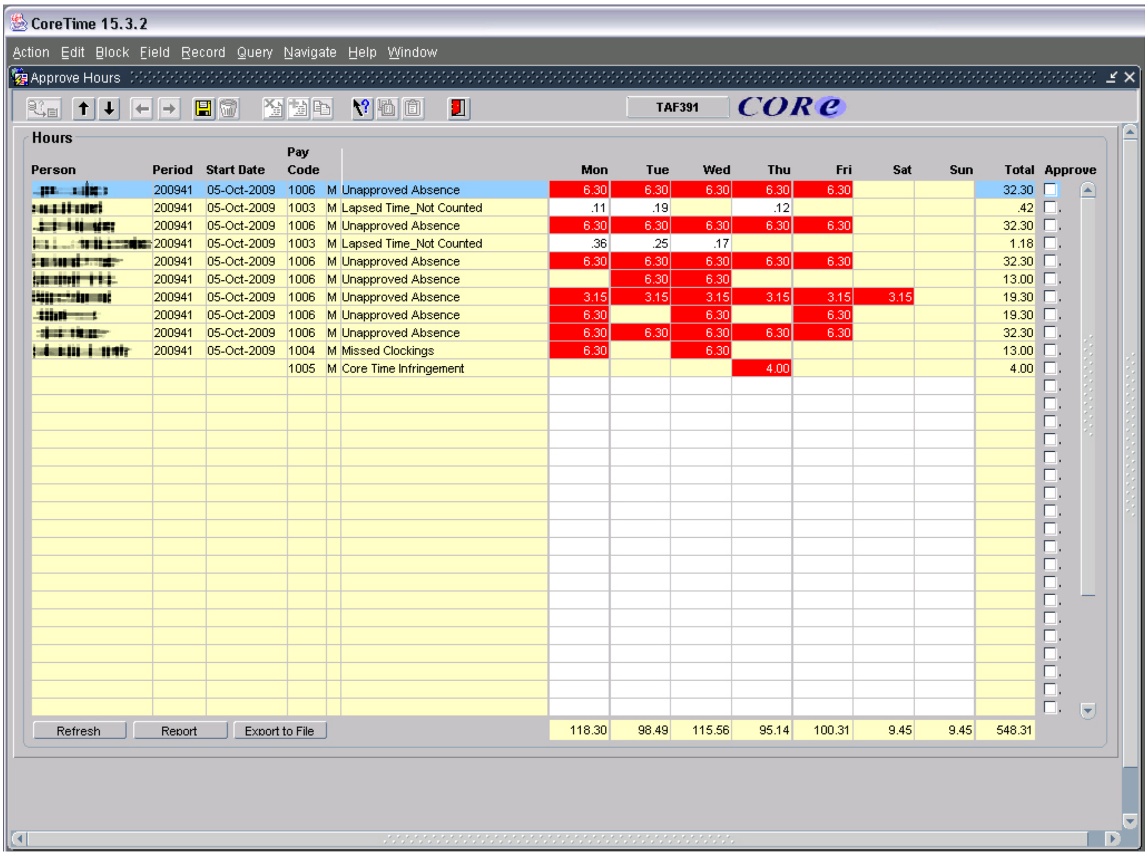
When all absences have been entered select the **Approve Hours** option from the **Time Mgt** menu.



Screen 3.2.1: The Approve Hours screen (Selection Criteria).

The *Selection Criteria* should be empty with the exception of the *Date Range*. This should be set to the week that is being reviewed. Click ***OK*** on this page.

This will bring up a list of all of the employee records for the week that require amendments.



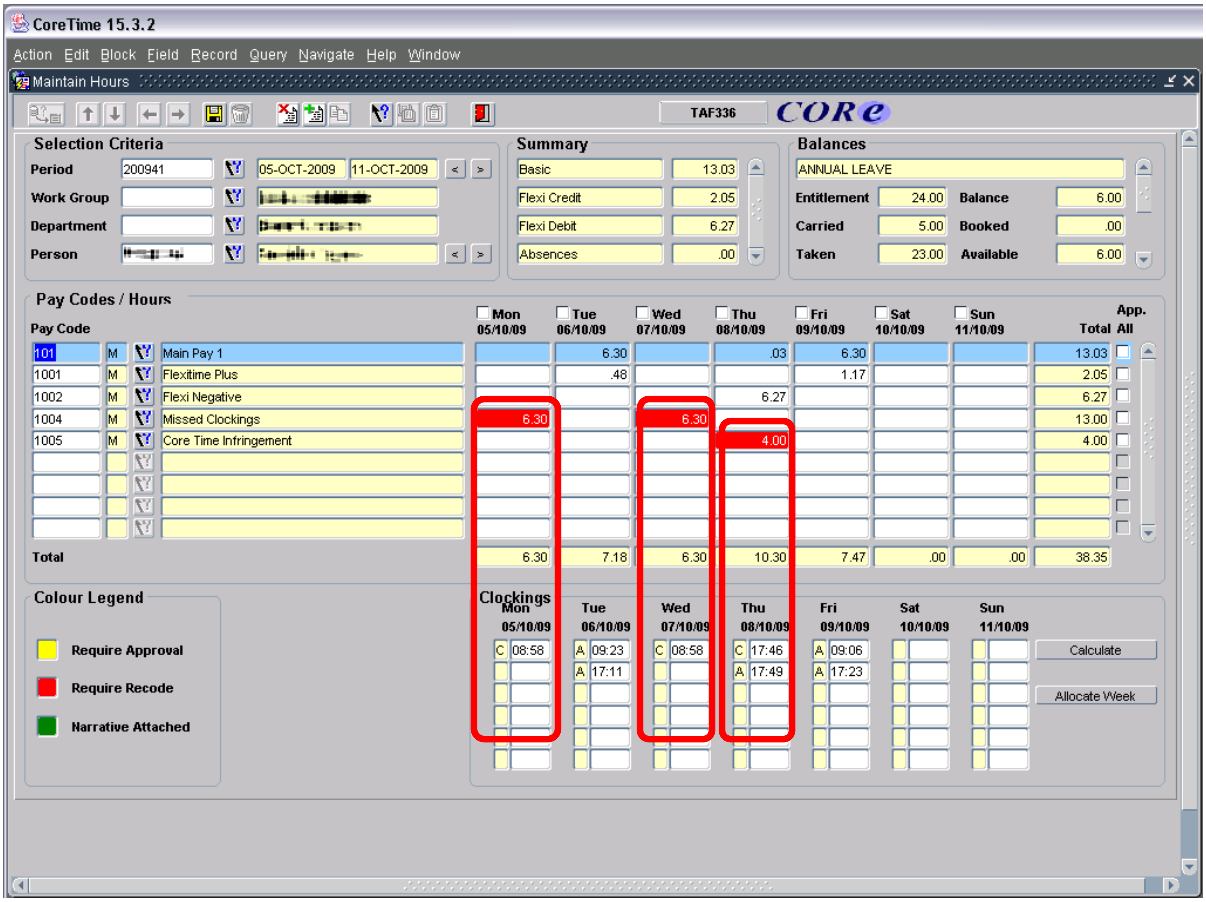
Screen 3.2.2: The Approve Hours screen.

The days that are highlighted in red require amendments. All of these records must be amended each week. To amend these records double-click on the record to get into the **Maintain Hours** screen. When you exit the **Maintain Hours** screen it will take you back into this screen to review the remaining outstanding records.

The days that are highlighted in white require approval. There is no need to go into these records. The administrator must first confirm that the details appearing here are accurate. Once this is done the administrator must approve them by clicking the *Approve* tick-box on the right-hand side and pressing the save icon.

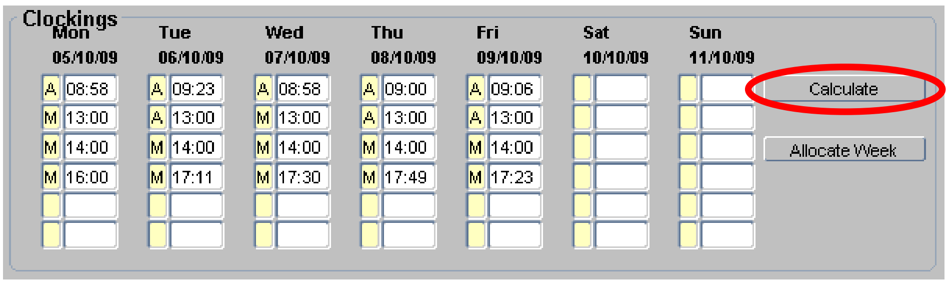
3.2.3 Amend Records

When in the ***Maintain Hours*** screen all days with a red highlighted section must be reviewed and amended. There are a number of reasons why an amendment would need to be made, as below.

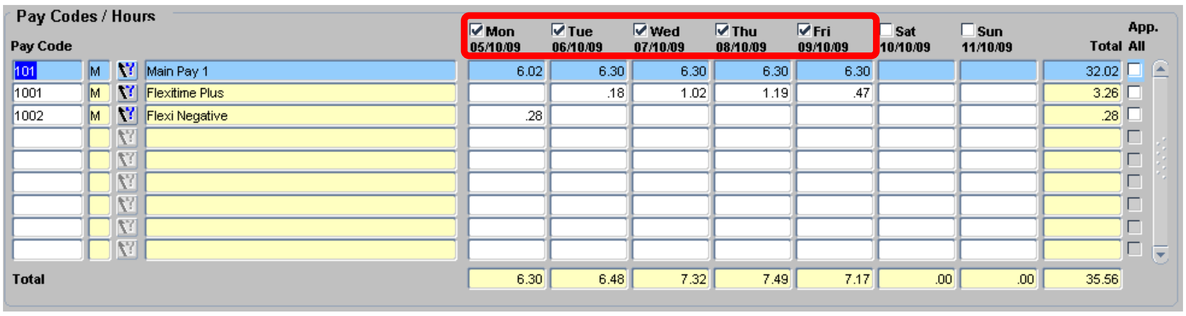


Screen 3.2.3: The Maintain Hours screen.

Once all of the maintenance has been carried out on the employee record click on the *Calculate* button to update the Pay Codes for the record. This will also close off the days to further amendments as noted by the tick above each day.



Screen 3.2.4: The Calculate button on the Maintain Hours screen.

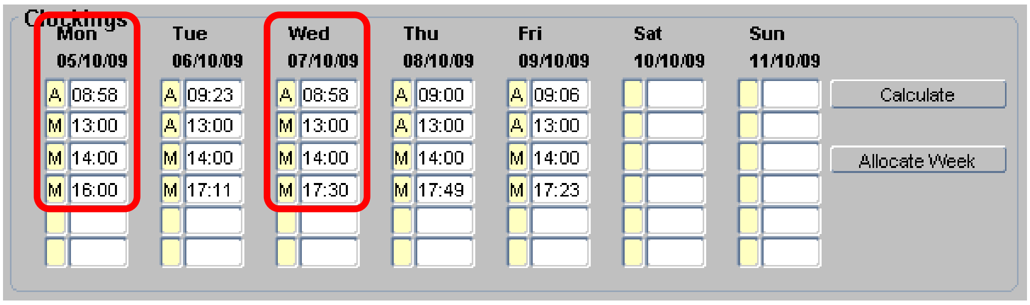


Screen 3.2.5: The updated Pay Codes and closed days on the Maintain Hours screen.

3.2.3.1 Missed Clockings

A Missed Clocking can occur when an employee does clock in but does not clock out. In these cases the administrator must confirm with the employee the hours worked on the day(s) in question. There are 2 possible reasons for a missed clocking.

1) **Employee has not signed out correctly.**
   This applies in the case where an employee has not signed out correctly, but was in fact working on the day(s) in question. In the **Maintain Hours** screen under the ***Clockings*** section enter the times the employee would have clocked in and out as per the below screenshot. Any manual adjustments appear with an ***M*** to the left of the time.



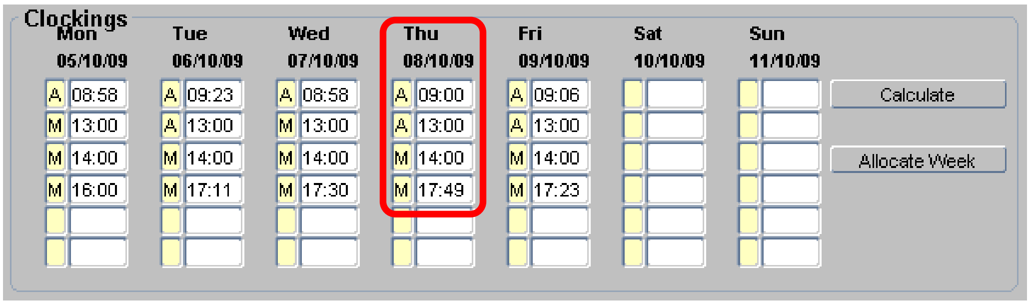
Screen 3.2.6: The amended hours on the Maintain Hours screen.

2) **Employee on Leave.**
   This applies if the employee was on leave on the day(s) in question, e.g. Annual Leave, Flexi-Leave, Sick Leave etc. If the employee was on leave the process for entering leave must be followed as per Section 3.2.1.

3.2.3.2 CORE TIME AND ATTENDANCE INFRINGEMENT

A CORE Time and Attendance Infringement will occur when an employee has signed in and out, but has missed some of their core hours. This can be caused by either signing in after the core hours begin or by signing out before the core hours are over. In these cases the administrator must confirm with the employee the hours worked on the day(s) in question. There are 4 possible reasons for a CORE Time and Attendance Infringement.

1) **Employee has not signed in or out correctly.**
This applies in the case where an employee has not signed in or out correctly, but was in fact working on the day(s) in question. In the **Maintain Hours** screen under the ***Clockings*** section enter the times the employee would have clocked in and out as per the below screenshot. Any manual adjustments appear with an ***M*** to the left of the time.

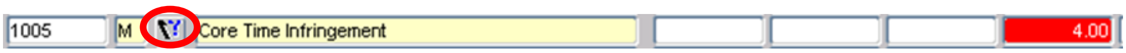


Screen 3.2.7: The amended hours on the Maintain Hours screen.

2) **Employee on Leave.**
This applies if the employee was on leave on the day(s) in question, e.g. half-day Annual Leave, Flexi-Leave, Sick Leave etc. If the employee was on leave the process for entering leave must be followed as per Section 3.2.1.

3) **Employee Out of the Office for agreed purpose.**
This applies if the employee was out of the office with the agreement of their line manager, e.g. on UCD business, off-site meeting, personal appointments etc. The administrator must confirm the times worked with the employee and the amount of time allocated to the absence. The hours in the office must be entered into the *Clockings* section and in the *Pay Codes/Hours* section the Pay Codes should be updated as follows:

On the line with the *CORE Time and Attendance Infringement* select the list of values button to update the record and select the *Excused Infringement With Time* code.



Screen 3.2.8: The list of values button on the Maintain Hours screen.

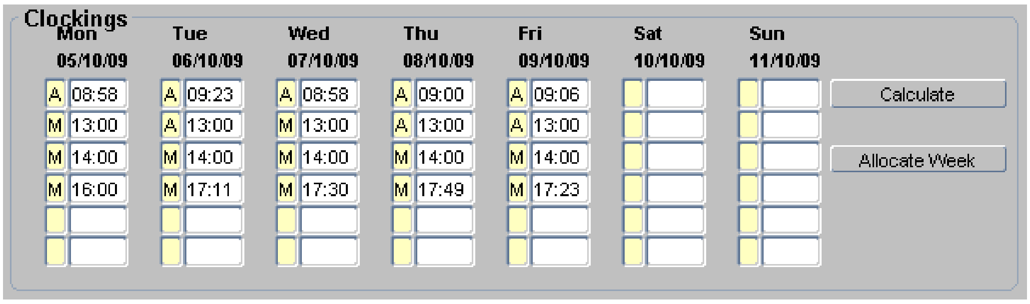
This Pay Code does not deduct from the employee Flexi-Time balance and identifies that the employee was in fact on UCD time for the period entered. It is important to ensure that the number of hours entered corresponds with the number of hours the employee was absent with the line managers agreement. Should the total number of hours on the CORE Time and Attendance Infringement exceed this then the administrator must also enter an additional Pay Code (*Excused Infringement Without Time*) to reflect this.

4) **Employee Out of the Office for other purpose.**
This applies if the employee was out of the office without the agreement of their line manager. The administrator must follow the same procedures as in the above (*Employee Out of the Office for agreed purposes*) selecting the *Excused Infringement Without Time* pay code instead of the *Excused Infringement With Time* code. This will deduct the relevant number of hours from their Flexi-Time balance.

3.2.3.3 UNAPPROVED ABSENCE

An Unapproved Absence will occur when an employee is expected to sign-in and has not. In these cases the administrator must confirm with the employee the hours worked on the day(s) in question or why they were absent on the day in question. There are 4 possible reasons for an Unapproved Absence.

1) **Employee neglected to sign in.**
   This applies in the case where an employee has not signed in but was in fact working on the day(s) in question. In the **Maintain Hours** screen under the ***Clockings*** section enter the times the employee would have clocked in and out as per the below screenshot. Any manual adjustments appear with an ***M*** to the left of the time. Click the *Calculate* button to calculate the Pay Codes.

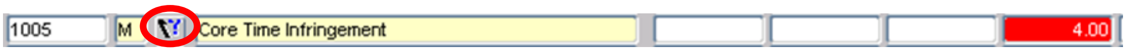


Screen 3.2.9: The amended hours on the Maintain Hours screen.

2) **Employee on Leave.**
   This applies if the employee was on leave on the day(s) in question, e.g. Annual Leave, Flexi-Leave, Sick Leave etc. If the employee was on leave the process for entering leave must be followed as per Section 3.2.1.

3) **Employee Out of the Office for agreed purpose.**
   This applies if the employee was out of the office with the agreement of their line manager, e.g. on UCD business, off-site meeting, personal appointments etc. The administrator must confirm the times worked with the employee and the amount of time allocated to the absence. The hours worked must be entered into the *Clockings* section and in the *Pay Codes/Hours* section the Pay Codes should be updated as follows:

   On the line with the *CORE Time and Attendance Infringement* select the list of values button to update the record and select the *Excused Infringement With Time* code.



Screen 3.2.10: The list of values button on the Maintain Hours screen.

   This Pay Code does not deduct from the employee Flexi-Time balance and identifies that the employee was in fact on UCD time for the period entered. It is important to ensure that the number of hours entered corresponds with the number of hours the employee was absent with the line managers agreement. Should the total number of hours on the CORE Time and Attendance Infringement exceed this then the administrator must also enter an additional Pay Code (*Excused Infringement Without Time*) to reflect this.

4) **Employee Out of the Office for other purpose.**
   This applies if the employee was out of the office without the agreement of their line manager. The administrator must follow the same procedures as in the above section (Employee Out of the Office for agreed purposes) selecting the *Excused Infringement Without Time* pay code instead of the *Excused Infringement With Time* code. This will deduct that time from their balance.

4 OUT OF COURSE AMENDMENTS

4.1 OVERVIEW

In some cases administrators may have to make amendments to employees' clockings from a previous week. The process for dealing with these cases differs depending on whether they are within the current 4-weekly Flexi-Period or not.

If an amendment is required within the current Flexi-Period it can be done in the same manner as any other amendment via the Maintain Hours screen. This is because CORE Time and Attendance can now calculate the balance adjustments that are required.

For amendments that are outside the current Flexi-Period CORE cannot retrospectively calculate all of the balances etc as this would impact carry-over balances from one period to the next. Administrators must then update the clockings in the week in question (this is required for accurate clocking data) and then insert a balance adjustment into the current week to update the Flexi-Time balance for the particular employee.

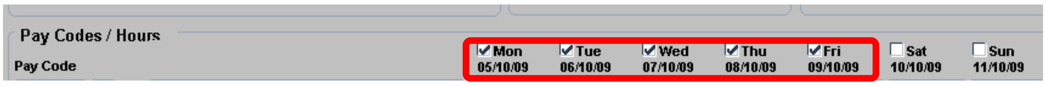
4.2 PROCEDURES FOR OUT OF COURSE AMENDMENTS

4.2.1 OUT OF COURSE AMENDMENTS WITHIN CURRENT FLEXI-PERIOD

For amendments to clockings within the current Flexi-Period open the ***Maintain Hours*** screen from the **Time Mgt** menu in CORE Time and Attendance and call up the employees' record. This will bring up the current week for that employee. Using the arrow buttons to the right of the date fields scroll to the week in question.

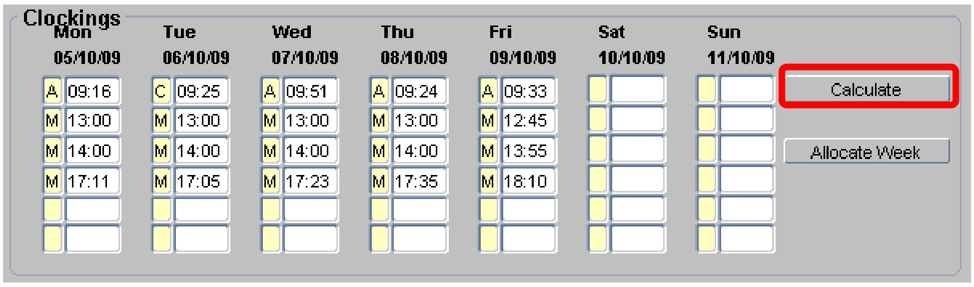
Screen 4.2.1: The Date Navigation buttons.

When the week is loaded each of the days will be locked.



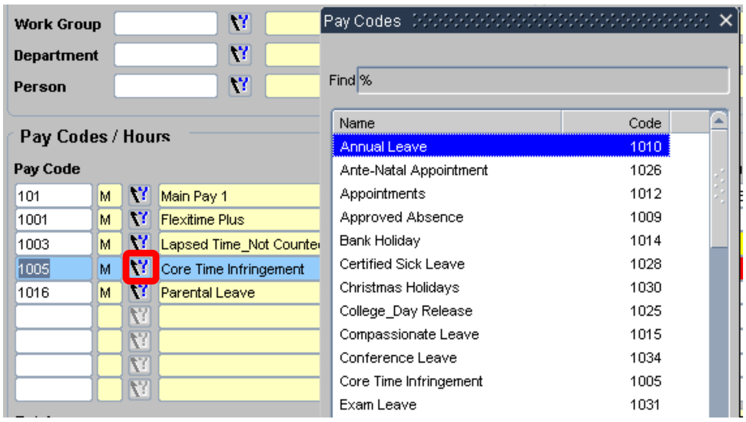
Screen 4.2.2: Days are locked with the tick box above the hours.

To edit a particular day the administrator must unlock it by un-ticking the relevant box. From here any necessary amendments can be made, e.g. updating the clockings or modifying the Pay Codes. To update the clockings enter the correct times and press the Calculate button to the right. This will automatically update the Pay Codes and lock the day again.



Screen 4.2.3: Updating and calculating hours.

To update the Pay Codes the administrator must select the correct Pay Code from the list of values after unlocking the day(s).



Screen 4.2.3: Selecting New Pay Codes.

4.2.2 Out of Course Amendments Before The Current Flexi-Period

For amendments that are required to weeks outside the current Flexi-Period there are 2 steps that must be completed.

1) **Correcting the Clockings**
   This step involved the administrator updating the clocking on the relevant days. This step will not update the Pay Codes or balances.

   - Select the ***Maintain Hours*** screen from the **Time Mgt** menu and call up the employee's record.
   - Using the arrow buttons to the right of the date field's scroll to the week in question.

Screen 4.2.4: Selecting the relevant week.

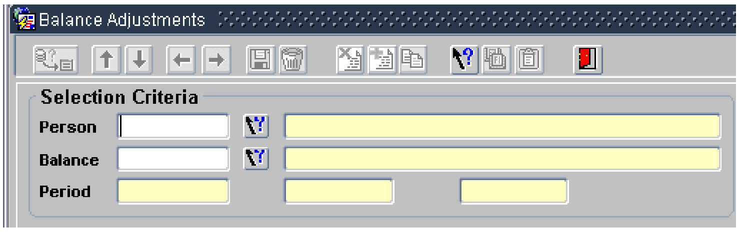
   - Update the hours in the *Clockings* section and press the save button.
     DO NOT UNLOCK THE DAYS OR PRESS THE CALCULATE BUTTON AS THIS WILL CAUSE SERIOUS ISSUES WITH FLEXI-BALANCES.

This will have corrected the clockings for the day(s) in question. Next the Flexi-Time Balance must be adjusted.

2) Inserting a Balance Adjustment

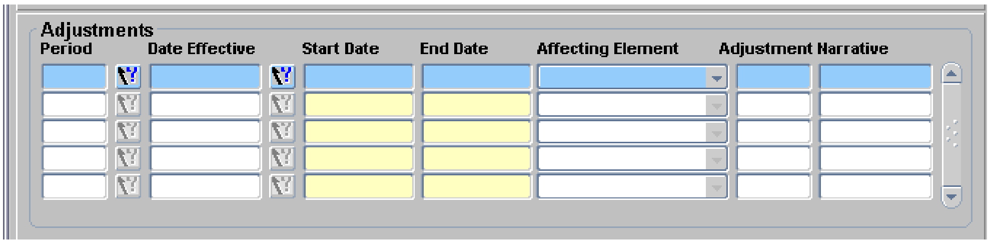
To update the Flexi-Balance to accurately reflect the new clockings administrators need to insert a Balance Adjustment into the period in question for the relevant number of hours. This can be done via the ***Balance Adjustments*** screen. This screen can be found under ***Balances*** within the **Time Mgt** menu.

- In the *Selection Criteria* section select the individual employee in the *Person* field, the Flexitime Balance option in the *Balance* field.



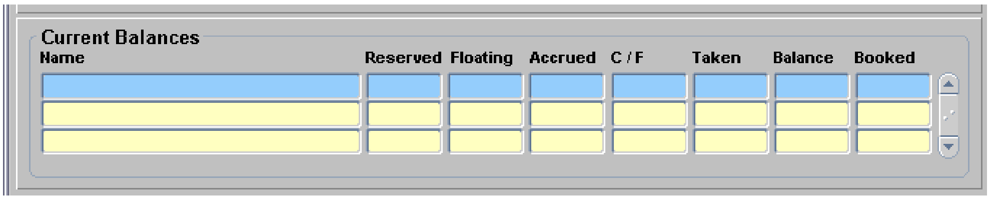
Screen 4.2.5: The Selection Criteria section.

- Select the relevant week in the *Adjustments* section under the *Period* field.



Screen 4.2.6: The Adjustments section.

- From the *Affecting Element* drop-down select the *Balance* option. This means that the Balance on the Flexi-Time Balance is to be affected.
- Enter in the value of the adjustment in the *Adjustment* field, i.e. if it is an increase of 10 minutes enter 0.10, if it is a decrease of an hour enter -1.00
- Enter a narrative to describe the reason behind the balance adjustment into the *Narrative* field.
- Click the save icon at the top of the screen.
- The balance in the Current Balances section should be updated.



Screen 4.2.6: The Current Balances section.

5 USER ADMINISTRATION

5.1 OVERVIEW

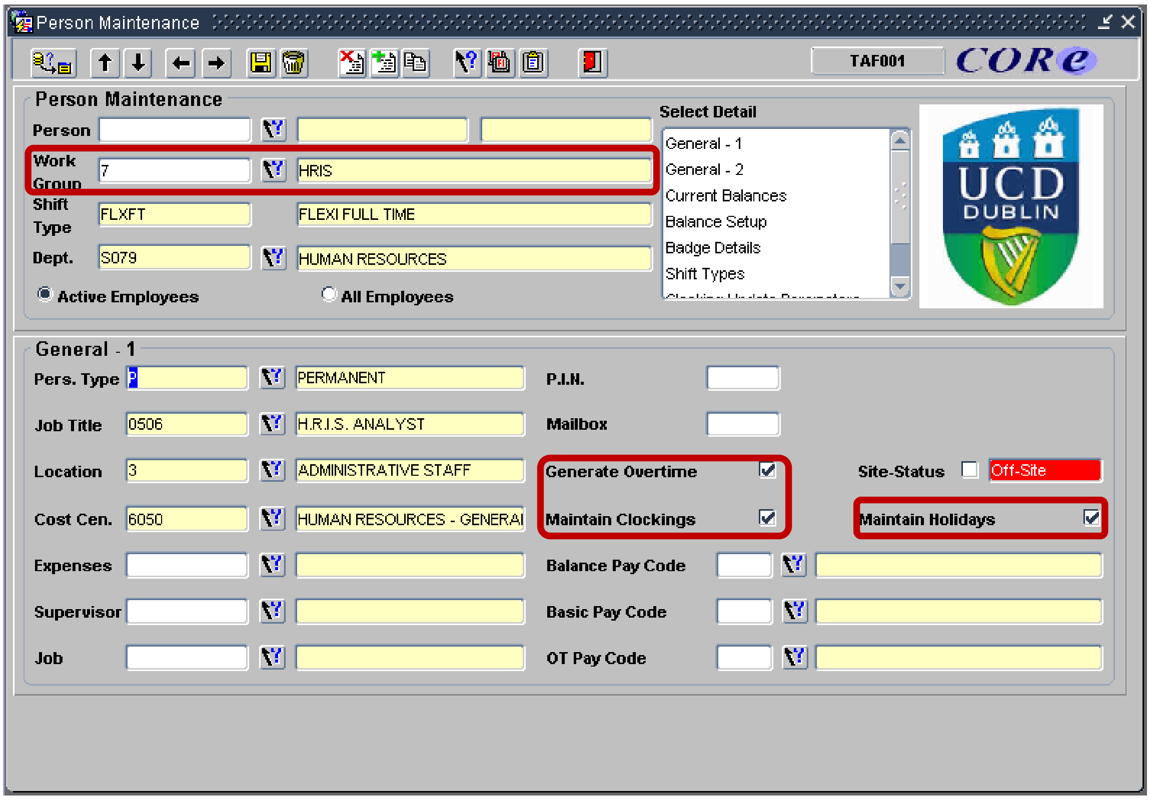
User Administration is the process where-by administrators set-up individual employees on the CORE Time and Attendance system to allow them to clock in and out. The following information is required before the set-up can begin:

1. The employees Personnel Number
2. The employees Annual Leave entitlement (and their remaining entitlement for the current year)
3. Their Badge ID – this is only required for employees using a clocking machine. To get the Badge ID Log into to InfoHub and find the report “Look Up Badge Details under the Human Resources tab.
4. The employees contracted hours. If these are non-standard hours a personalised shift type will need to be set up.

5.2 Procedures For User Administration

5.2.1 General User Setup

Employees are set up from the ***Person Maintenance*** screen. This screen can be selected from the **Pers Data** menu.



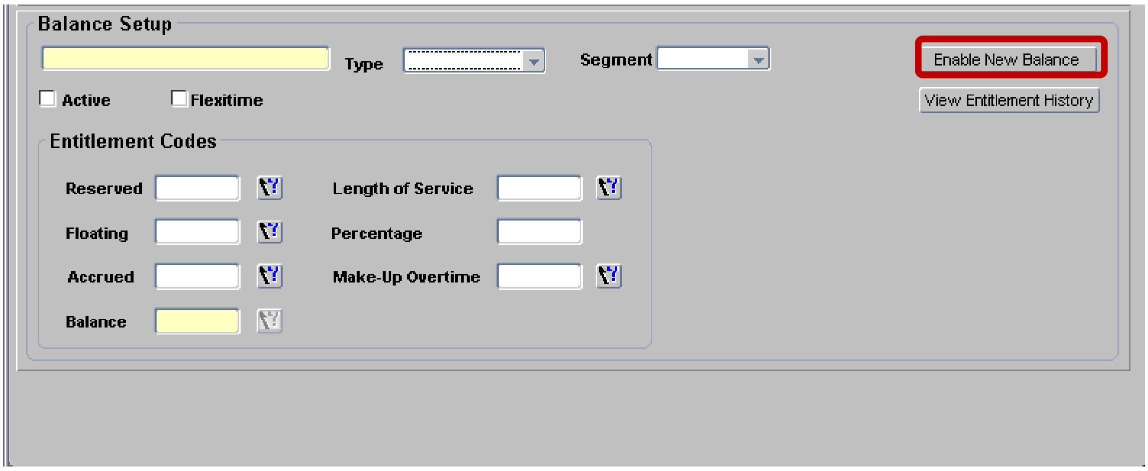
Screen 5.2.1: The Person Maintenance screen.

Search for the employee record by entering the Personnel Number into the *Person* field. The following steps will be required to set up all new staff:

- The Work Group filed should already be set to...........
- Shift Type will automatically be populated.
- Check the *Generate Overtime* box.
- Check the *Maintain Clockings* box.
- Check the *Maintain Holidays* box.
- Click on the save icon to save the changes.

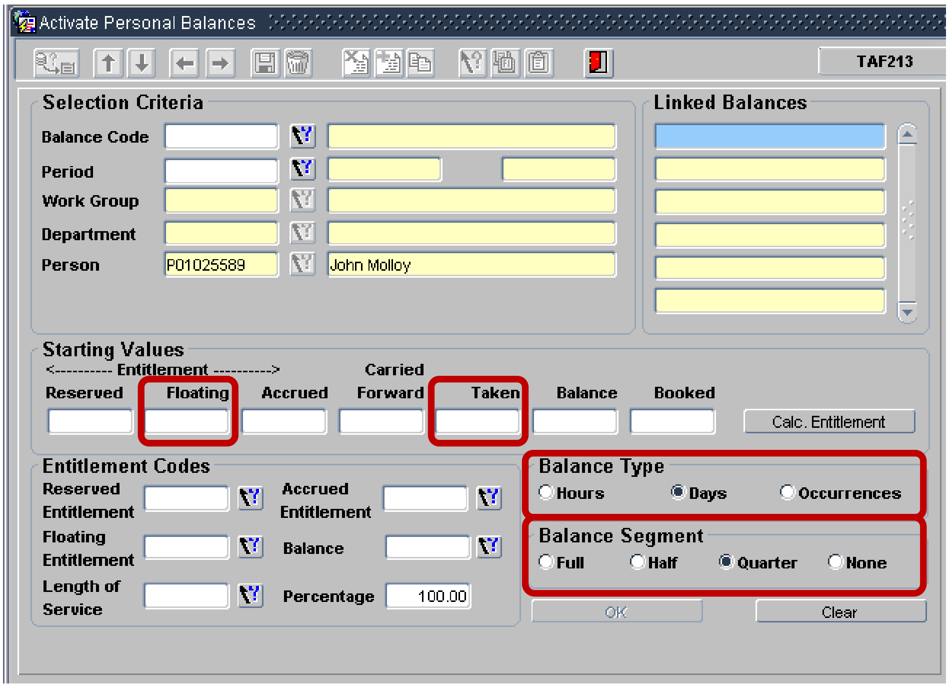
5.2.2 Annual Leave Balance Setup

- In the Person Maintenance screen select the *Balance Setup* option from the *Select Detail* list.



Screen 5.2.2: The Balance Setup option on the Person Maintenance screen.

- Click the Enable *New Balance* button. This will open the ***Activate Personal Balances*** screen.

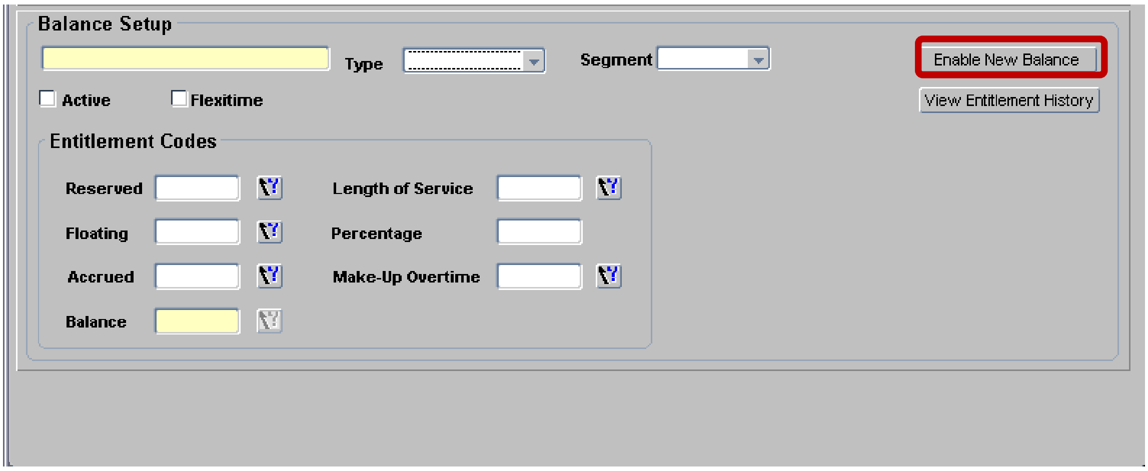


Screen 5.2.3: The Activate Personal Balances screen.

- Select the *Annual Leave* option from the *Balance Code* list of values.
- In the *Starting Values* section *Floating* field enter the employees contracted Annual Leave entitlement. This will only apply to the current year.
- If the employee is starting part of the way through the year enter the number of days of Annual Leave entitlement lost due to no service in the *Taken* field, e.g. if the employee starts on 01st July and is entitled to 20 days Annual Leave 10 should be entered into the *Taken* field as they have missed one half of the year and are then only entitled to 10 days in that year.
- In the *Floating Entitlement* box select the relevant grade from the list of values for the employee's yearly entitlement. This will apply to all future years.
- In the *Balance Type* section select the *Days* option.
- In the *Balance Segment* option select the *Half* option.
- Click OK to save.

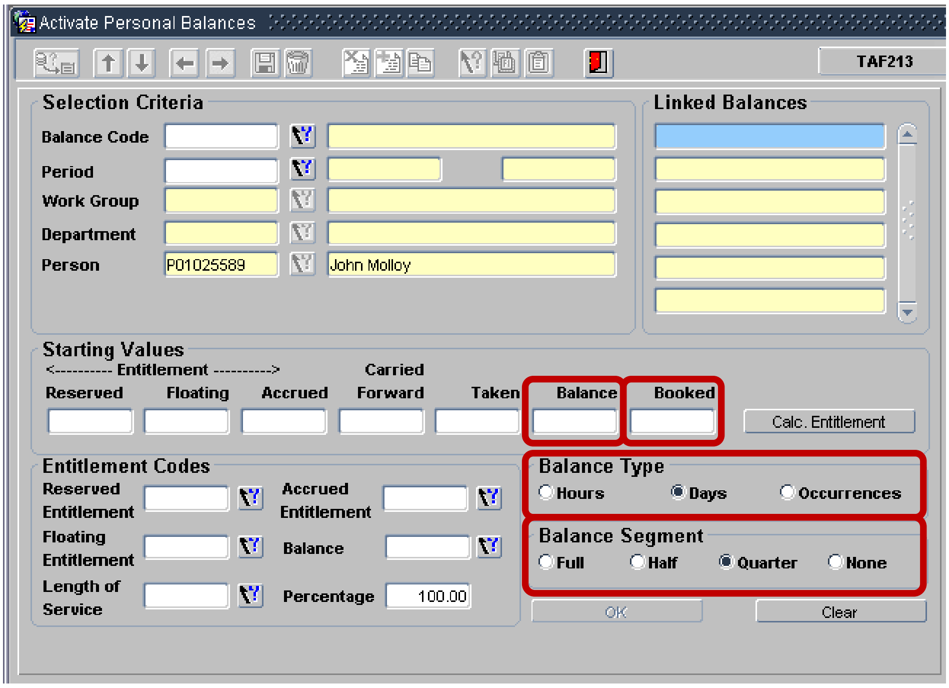
5.2.3 Flexi-Time Balance Setup

- In the Person Maintenance screen select the *Balance Setup* option from the *Select Detail* list.



Screen 5.2.4: The Balance Setup option on the Person Maintenance screen.

- Click the Enable *New Balance* button. This will open the ***Activate Personal Balances*** screen.

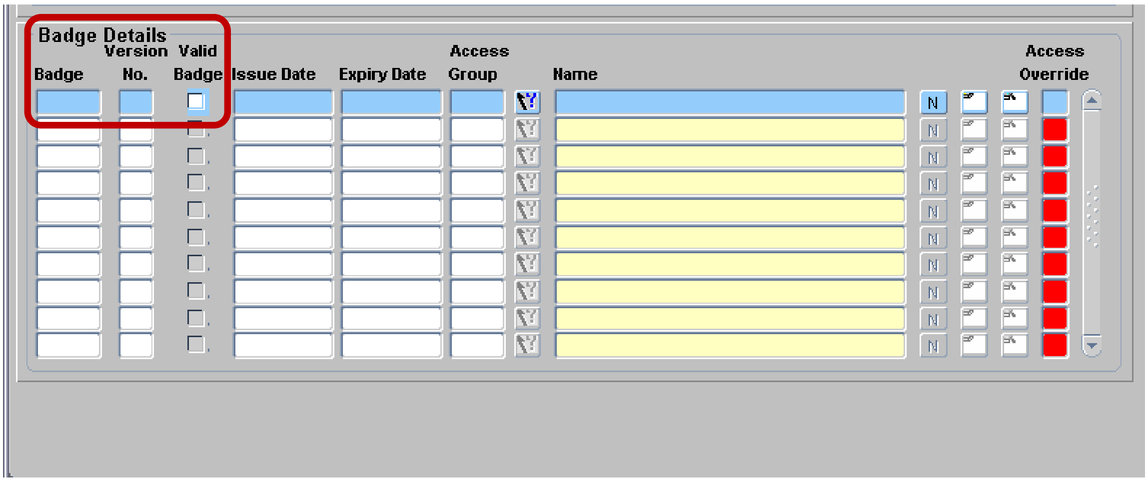


Screen 5.2.5: The Activate Personal Balances screen.

- Select the appropriate Flexi-Time option for the work group from the *Balance Code* list of values.
- In the *Starting Values* section *Balance* and *Booked* fields enter 0.
- In the *Balance Type* section select the *Hours* option.
- In the *Balance Segment* option select the *None* option.
- Click OK to save.

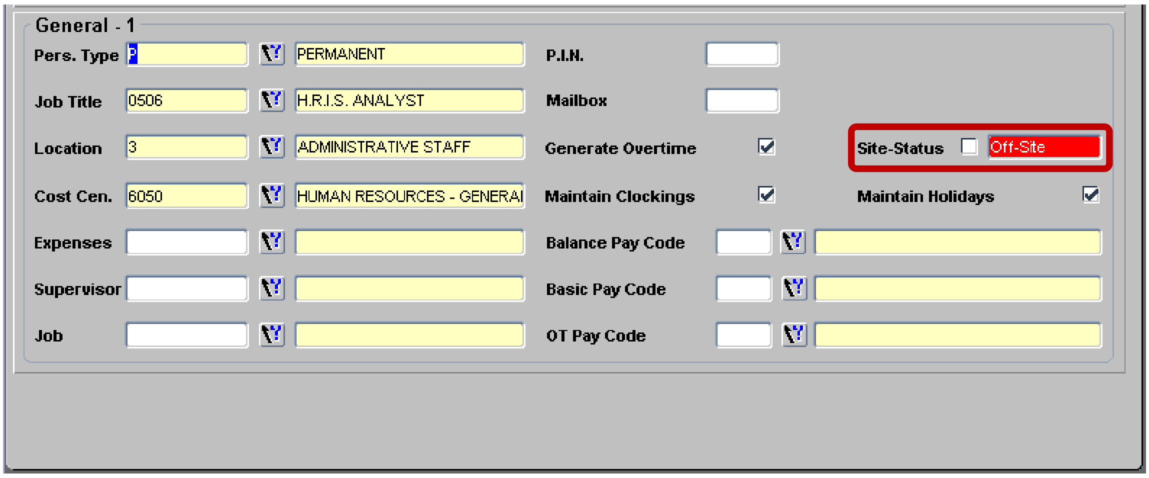
If the employee is going to be logging their hours using a clocking machine the following steps are required also.

5.2.4 Badge Setup for Clocking Machines



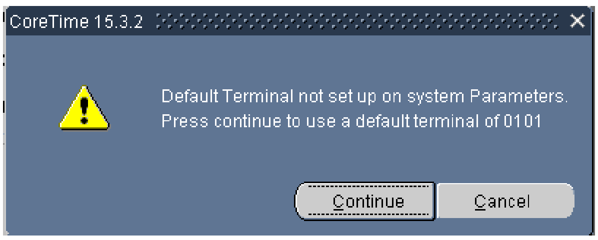
Screen 5.2.6: The Badge Details option on the Person Maintenance screen.

- In the Person Maintenance screen select the *Badge Detail* option from the *Select Detail* list.
- In the *Badge* field enter their Badge Number (this can be gotten from the InfoHub report).
- In the *Version* field enter the number 1.
- Check the *Valid Badge* box.
- Select the *General – 1* option from the *Select Detail* list.



Screen 5.2.6: The Badge Details option on the Person Maintenance screen.

- Check the *Site-Status* box. This will set the site status to On-Site. The following message will appear.

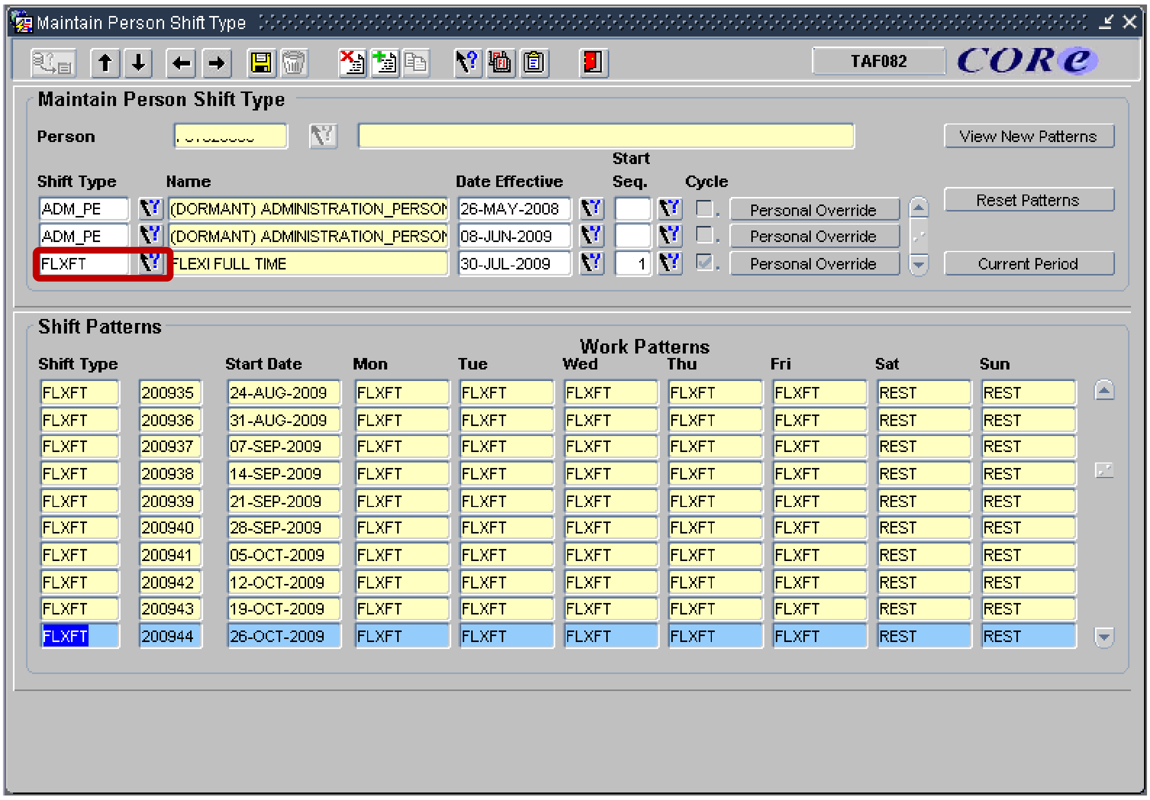


- Click the *Continue* button.

5.2.5 Setting Up Personalised Shift Types

Personalised Shift Types are for employees doing non-standard hours. Non-standard hours are those that are particular to an individual employee and therefore not common among those in the same Work Group. All Personalised Shift Types must be set up in advance of the employee beginning the shift type.

Setting up of Personalised Shift Types is done through the ***Person Maintenance*** screen in CORE Time and Attendance. In the *Select Detail* section of the screen click on the *Shift Types* option. This will open the *Maintain Person Shift Type* screen.

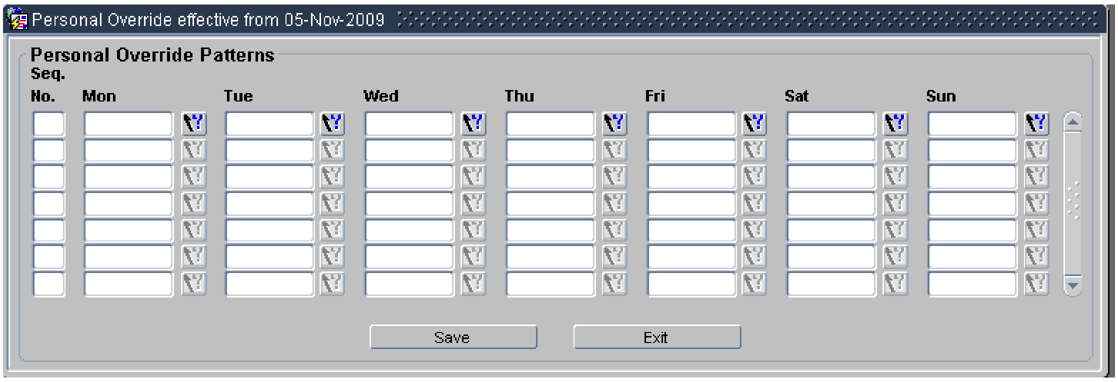


Screen 5.2.7: The Maintain Person Shift Type screen.

To set up a personalised shift type the administrator must do the following:

- Click on the last *Shift Type* in the *Maintain Person Shift Type* section and press the *Add New Record* icon( ).
- From the *Shift Type* list of available values select the PERS shift type.
- Enter the Date Effective as the first working day that the employee will begin the shift type. This date ***must*** be in the future or the current day.
- Enter the starting sequence – this is usually 1 unless the employee is working different hours on different weeks. See the below section on sequences for further details.

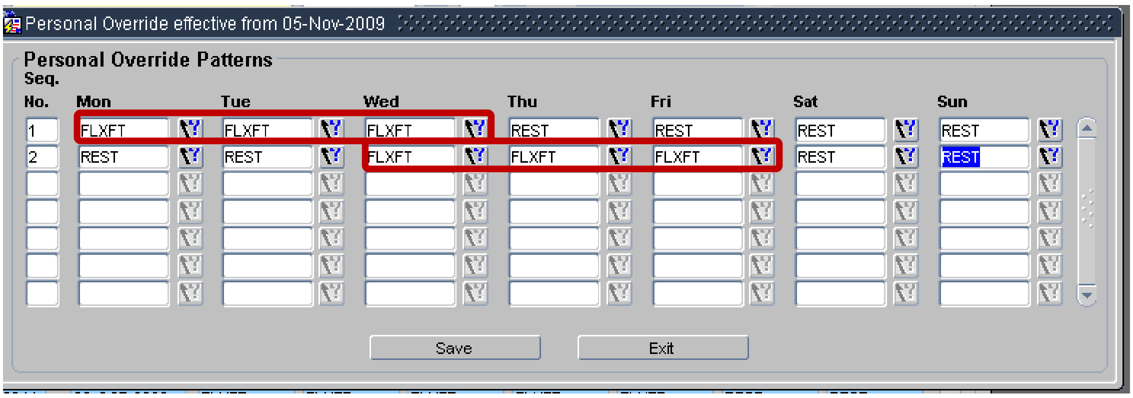
- Press the *Personal Override* button – this will display the *Personal Override Patterns* screen.



Screen 5.2.8: The Personal Override Patterns screen.

- If the employee is working a single pattern, i.e. the same hours each week, only 1 sequence needs to be set up.
- Select a Work Pattern for each of the days of the week that correspond to the hours they are working each day. For days that the employee is not scheduled to be in work the Work Pattern REST should be used.
- If the employee is working different hours on different weeks a new sequence will need to be set up for each week that is different.

  For example if the employee is working 3 day week, one week they work Monday, Tuesday and Wednesday and the next they work Wednesday, Thursday and Friday, 2 sequences will need to be set up to reflect this.



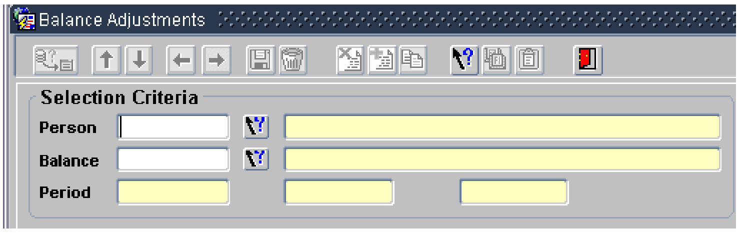
Screen 5.2.9: The Personal Override Patterns screen with multiple sequences.

- Click Save to exit.

5.2.6 Making a Balance Adjustment

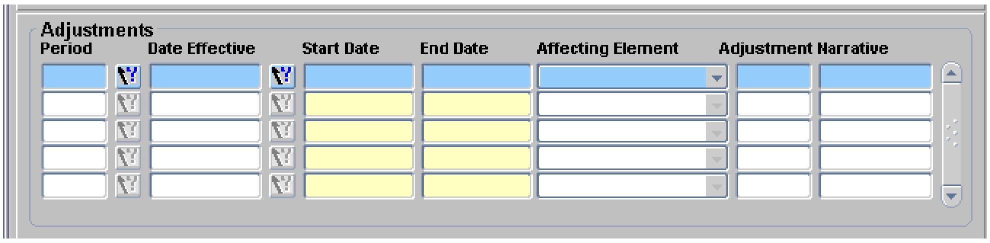
It may become necessary to change a user's flexi or annual leave balance for a number of reasons. If you wish to update a flexi or annual leave balance this can be done via the ***Balance Adjustments*** screen. This screen can be found under ***Balances*** within the **Time Mgt** menu.

- In the *Selection Criteria* section select the individual employee in the *Person* field, the Flexitime Balance option in the *Balance* field.



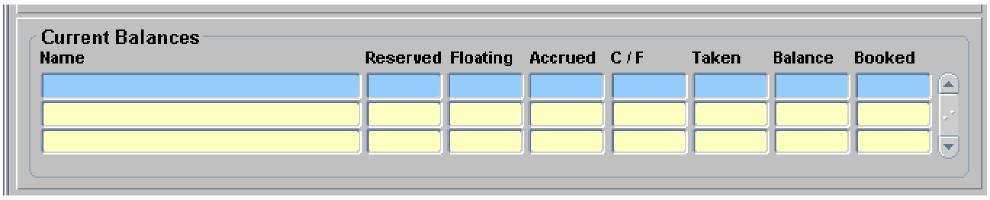
Screen 5.2.10: The Selection Criteria section.

- Select the relevant week in the *Adjustments* section under the *Period* field.



Screen 5.2.11 The Adjustments section.

- From the *Affecting Element* drop-down select the *Balance* option. This means that the Balance on the Flexi-Time Balance is to be affected.
- Enter in the value of the adjustment in the *Adjustment* field, i.e. if it is an increase of 10 minutes enter 0.10, if it is a decrease of an hour enter -1.00
- Enter a narrative to describe the reason behind the balance adjustment into the *Narrative* field.
- Click the save icon at the top of the screen.
- The balance in the Current Balances section should be updated.



Screen 5.2.12: The Current Balances section.

6 REPORTS

6.1 OVERVIEW

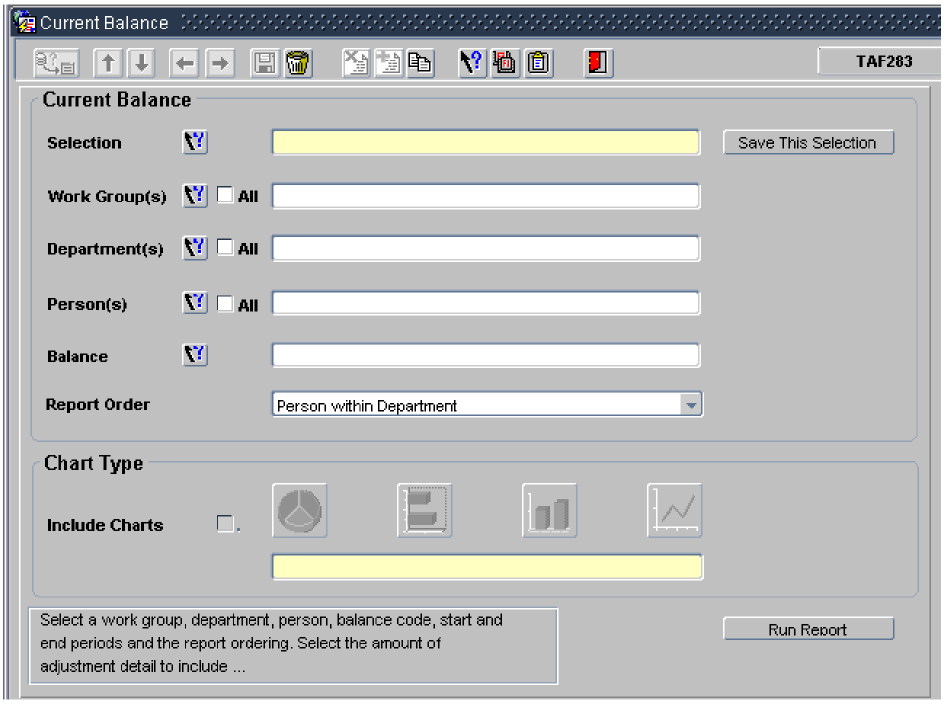
CORE Time and Attendance includes a number of reports that can assist administrators in their duties. These reports all appear in the **Reports** menu under the **Balances** option. They are the ***Current Balance*** report, the ***Balance Detail*** report and the ***Flexitime Transaction*** report. When run these reports will open in PDF format. A new suit of reports are being developed during 2014 in InfoHub. These reports will be made available to area Managers and flexi-time admins upon request once they are available.

6.2 REPORTS

The following are the reports that administrators would find of most benefit. All can be found in the

6.2.1 THE CURRENT BALANCE REPORT

The Current Balance report provides a summary of the current position of a selected balance for a selected user or group of users, i.e. the employee's entitlements for that balance including time taken to date and a real-time remaining balance.



Screen 7.2.1: The Current Balance report screen.

The administrator must select the balance they wish to review, i.e. Annual Leave or Flexi-Time. The administrator then also has the option to select either a particular group or individual. If they only select a balance then all employees that the individual administrator has access to will appear.

Once all of the relevant selection criteria have been entered click the *Run Report* button. The report will open in a new window in PDF format. The *Export to File* button will also now appear below the *Run Report* button. To save the file to Excel click on the *Export to File* button.

Flexitime Balance For Personnel Report TAR283

University College Dublin 02-NOV-2009 11:53 Page 1

Department : 8079 Human Resources

Person	Name	Type	Segment	Reserved Entl.	Floating Entl.	Accrued Entl.	Carried Forward	Taken	Balance	Booked
P01[redacted]	[redacted]	Hours	None	0.00	0.00	0.00	0.00	0.00	2.03	0.00
P01[redacted]	[redacted]	Hours	None	0.00	0.00	0.00	0.00	0.00	10.19	0.00
P01[redacted]	[redacted]	Hours	Half	0.00	0.00	0.00	0.00	0.00	13.09	0.00
P01[redacted]	[redacted]	Hours	None	0.00	0.00	0.00	0.00	0.00	0.22	0.00
P01[redacted]	[redacted]	Hours	None	0.00	0.00	0.00	0.00	0.00	9.24	0.00

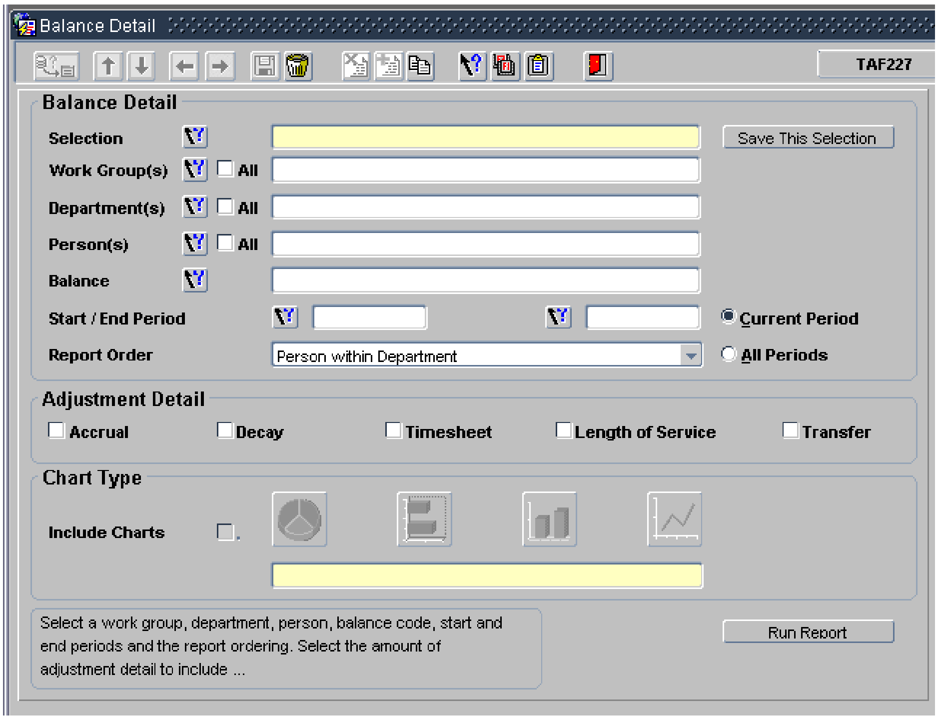
Summary of Balances by Department

Type	Reserved Entl.	Floating Entl.	Accrued Entl.	Carried Forward	Taken	Balance	Booked
Hours	0.00	0.00	0.00	0.00	0.00	33.75	0.00

Screen 7.2.2: The Current Balance report.

6.2.2 THE BALANCE DETAIL REPORT

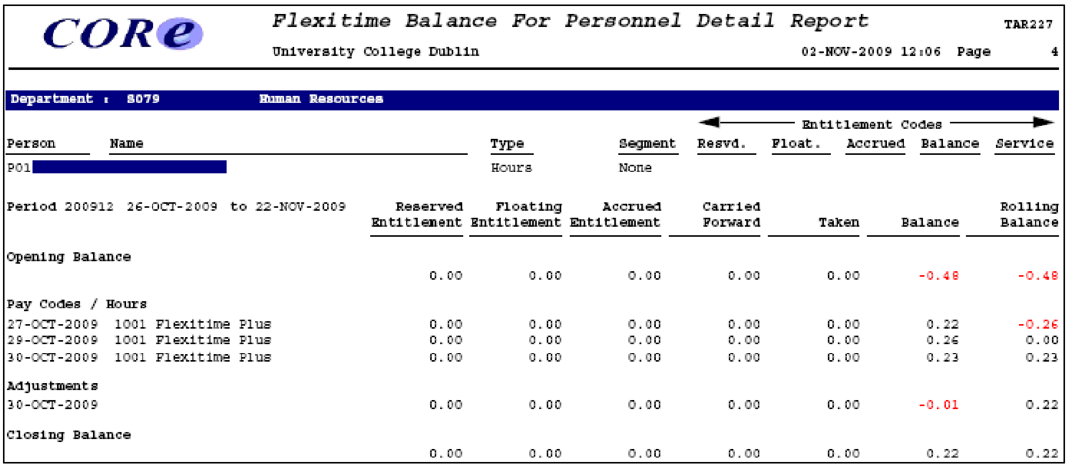
The Balance Detail report is a more detailed version of the Current Balance report. It gives a breakdown of the selected balance activity within a selected period, e.g. the opening balance, relevant Pay Codes and adjustments, rolling balance and closing balance.



Screen 7.2.3: The Balance Detail report screen.

The administrator must select the balance they wish to review, i.e. Annual Leave or Flexi-Time. The administrator then also has the option to select either a particular group or individual. If they only select a balance then all employees that the individual administrator has access to will appear. Finally the administrator can select a particular period or range of periods in the *Start/End Period* fields. The default is always the current period.

Once all of the relevant selection criteria have been entered click the *Run Report* button. The report will open in a new window in PDF format. The *Export to File* button will also now appear below the *Run Report* button. To save the file to Excel click on the *Export to File* button.



CORe

Flexitime Balance For Personnel Detail Report TAR227

University College Dublin 02-NOV-2009 12:06 Page 4

Department : 8079 Human Resources

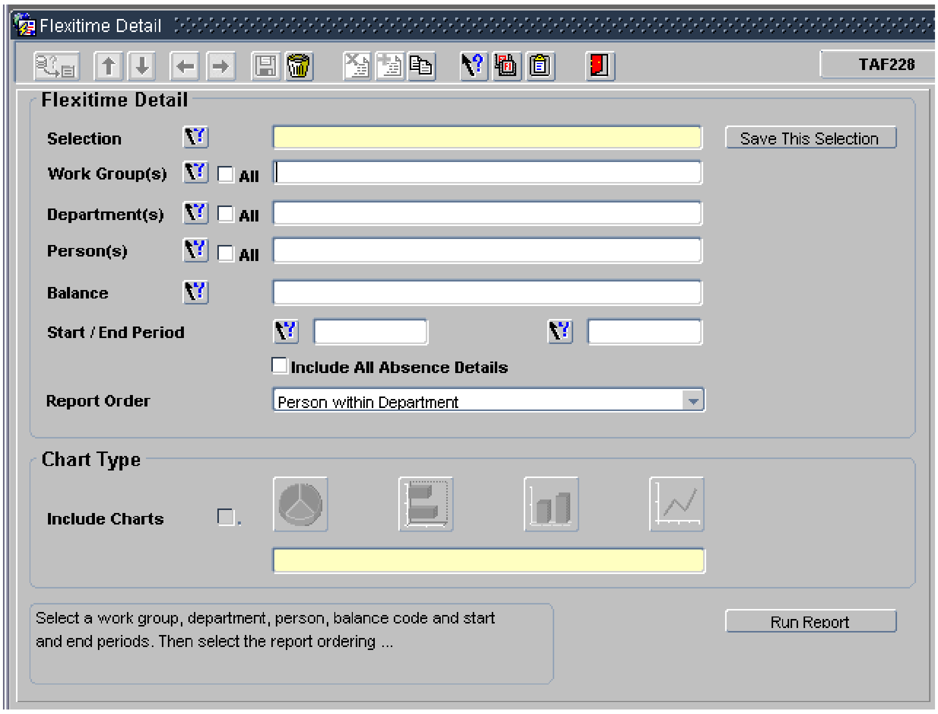
Person	Name	Type	Segment	Resvd.	Float.	Accrued	Balance	Service
				Entitlement Codes				
P01	[redacted]	Hours	None					

Period 200912 26-OCT-2009 to 22-NOV-2009	Reserved Entitlement	Floating Entitlement	Accrued Entitlement	Carried Forward	Taken	Balance	Rolling Balance
Opening Balance							
	0.00	0.00	0.00	0.00	0.00	-0.48	-0.48
Pay Codes / Hours							
27-OCT-2009 1001 Flexitime Plus	0.00	0.00	0.00	0.00	0.00	0.22	-0.26
29-OCT-2009 1001 Flexitime Plus	0.00	0.00	0.00	0.00	0.00	0.26	0.00
30-OCT-2009 1001 Flexitime Plus	0.00	0.00	0.00	0.00	0.00	0.23	0.23
Adjustments							
30-OCT-2009	0.00	0.00	0.00	0.00	0.00	-0.01	0.22
Closing Balance							
	0.00	0.00	0.00	0.00	0.00	0.22	0.22

Screen 7.2.4: The Balance Detail report.

6.2.3 The Flexitime Transaction Report

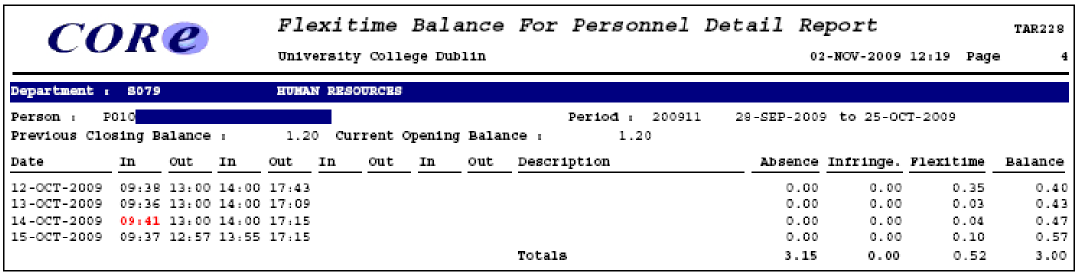
The Flexitime Transaction report contains daily details of all of the clockings in the selected period(s) and the impact of those on the selected balance.



Screen 7.2.5: The Flexitime Transaction report screen.

The administrator must select the balance they wish to review, i.e. Annual Leave or Flexi-Time. The administrator then also has the option to select either a particular group or individual. If they only select a balance then all employees that the individual administrator has access to will appear. Finally the administrator can select a particular period or range of periods in the *Start/End Period* fields. The default is always the current period.

Once all of the relevant selection criteria have been entered click the *Run Report* button. The report will open in a new window in PDF format. The *Export to File* button will also now appear below the *Run Report* button. To save the file to Excel click on the *Export to File* button.



CORe

Flexitime Balance For Personnel Detail Report TAR228

University College Dublin 02-NOV-2009 12:19 Page 4

Department : 8079 HUMAN RESOURCES

Person : P010[redacted] Period : 200911 28-SEP-2009 to 25-OCT-2009

Previous Closing Balance : 1.20 Current Opening Balance : 1.20

Date	In	Out	In	Out	In	Out	In	Out	Description	Absence	Infringe.	Flexitime	Balance
12-OCT-2009	09:38	13:00	14:00	17:43						0.00	0.00	0.35	0.40
13-OCT-2009	09:36	13:00	14:00	17:09						0.00	0.00	0.03	0.43
14-OCT-2009	09:41	13:00	14:00	17:15						0.00	0.00	0.04	0.47
15-OCT-2009	09:37	12:57	13:55	17:15						0.00	0.00	0.10	0.57
									Totals	3.15	0.00	0.52	3.00

Screen 7.2.6: The Flexitime Transaction report.