

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 flexitime 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 <u>Section 2</u>.

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 <u>Section 3</u>.

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 <u>Section 4</u>.

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 <u>Section 5</u>.

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 (<u>http://www.ucd.ie/hr/leave/sickleave/</u>) or the Sick Leave mailbox within HR (e-mail <u>sickleave@ucd.ie</u>).

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.

Record Absence Details 000000000000000000000000000000000000	000000000000000000000000000000000000000
	TAF338 CORC
Selection Criteria	
Work Group	July 2009 August 2009 September 2009
Department	M T W T F S S M T W T F S S M T W T F S S 01 02 03 04 05 0 01 02 01 02 03 04 05 06
Person 🚺 < >	06 07 08 09 10 11 12 BH 04 05 06 US 08 09 07 08 09 10 11 12 13
Start 2009 July 👻 < >	20 21 22 23 24 25 26 FL 18 19 20 21 22 23 AL AL AL AL AL AL 26 27
Active Employees O All Employees	21 20 29 30 31 24 23 20 21 20 29 30 20 29 14 31
Absence Details	Orther 2009 Neverther 2009 December 2009
Pay Code	MTWTFSS MTWTFSS MTWTFSS
Start/End 🚺 🚺 Use calendar to select days	01 02 03 04 01 02 03 04 05 06 07 08 07 08 09 10 11 12 13
Narrative Weeks	12 MC MC 15 16 17 18 09 10 11 12 13 14 15 14 15 16 17 18 19 20 19 20 21 22 23 24 25 16 17 18 19 20 21 22 21 22 23 24 CH CH 27
Reason 🚺 Days	BH 27 28 29 30 31 23 24 25 26 27 28 29 28 29 30 31
View Calendar Approve Hours	
Cost Centre	January 2010 February 2010 March 2010
Project	01 02 03 01 02 03 04 05 06 07 01 02 03 04 05 06 07
	04 05 06 07 08 09 10 08 09 10 11 12 13 14 08 09 10 11 12 13 14 11 12 13 14 15 16 17 15 16 17 18 19 20 21 15 16 17 18 19 20 21
Return To Work Interview	18 19 20 21 22 23 24 22 23 24 25 26 27 28 22 23 24 25 26 27 28 22 23 24 25 26 27 28 29 30 31 24 25 26 27 28 29 30 31 25 26 27 28 29 30 31 24 25 26 27 28 29 30 31 27 28 29 30 31 28 29 30 31 27 28 28 29 30 31 27 28 28 29 30 31 28 29 30 31 28 28 29 30 31 28 28 28 28 28 28 28 28 28 28 28 28 28 28 28 28 28 28<
Interview has taken Place	
Narrative	April 2010 May 2010 June 2010
Balances	MTWTFSS MTWTFSS MTWTFSS
Name Total Taken Booked Balance	
ANNUAL LEAVE D 23.50 21.00 .00 2.50	12 13 14 15 16 17 18 10 11 12 13 14 15 16 14 15 16 17 18 19 20 19 20 21 22 23 24 25 1 17 18 19 20 21 22 23 21 22 23 24 25 26 27
Flexitime Balance for Personnel H .00 .00 .00 6.51	26 27 28 29 30 24 25 26 27 28 29 30 28 29 30

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 <u>Section 2.2</u>.

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.

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erson	Period	Start Date	Code			Mon	lue	Wed	Thu	Fri	Sat	Sun	lotal	Appro	ve
	200941	05-Oct-2009	1006	M Unapp	proved Absence	6.30	6.30	6.30	6.30	6.30			32.30	2	^
	200341	05-Oct-2009	1005	M Lineor	proved Absence	6.30	6 30	6.30	8 30	8 30			32 30	E.	
	200041	05-Oct-2009	1003	M Lanse	ed Time. Not Counted	36	25	17	0.00	0.00			1 18	E.	
BARRY TOTAL	200941	05-Oct-2009	1006	M Unap	proved Absence	6.30	6.30	6.30	6.30	6.30			32.30	Ē.	
ta alleft - t + t +	200941	05-Oct-2009	1006	M Unap	proved Absence		6.30	6.30					13.00		
it state	200941	05-Oct-2009	1006	M Unapp	proved Absence	3.15	3.15	3.15	3.15	3.15	3.15		19.30	Π.	
tilutit	200941	05-Oct-2009	1006	M Unapp	proved Absence	6.30		6.30		6.30			19.30	Π.	
den stater -	200941	05-Oct-2009	1006	M Unapp	proved Absence	6.30	6.30	6.30	6.30	6.30			32.30	Π.	
	200941	05-Oct-2009	1004	M Misse	ed Clockings	6.30		6.30					13.00	Π.	
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				-											

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 <u>Section 3.2.2</u>.

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.

Maintain Hours 000000000000000000000000000000000000								. 19999999999
Selection Criteria Period 20042 V 12-OCT-2009 18-OC Vork Group V Department V Person V	St. 2009 < >	ımmary		F336	Balances Entitlemen Carried Taken	t	Balance Booked Available	
Pay Codes / Hours Pay Code VV V	Mon 12/10/99	Tue 13/10/09	Wed 14/10/09	Thu 15/10/09	Fri 16/10/09	Sat 17/10/09	Sun 18/10/09	App. Total All
Total Colour Legend Require Approval Require Recode Harrative Attached		gs Tue 13/10/09 09 09 00 00 00 00 00 00 00 00 00 00 0	Wed 9 14/10/05 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Thu 9 15/10/02 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	Fri 9 16/10/0	Sat 9 17/10/0	Sun 18/10/09	Celoulete Allocate Week

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 <u>Section 3.2.3</u>.

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.



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.

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Action Edit Block Field Record Query Navigate Help Window		
🙀 Record Absence Details $1000000000000000000000000000000000000$		<'≚ ×
	TAF338 CORC	
Selection Criteria		
Work Group		
Department <u>Y</u>		
Person < >		
Start 2009 June		
Active Employees All Employees		- 11
Absence Details		
Pay Code		
Start/End V Use calendar to select days		
Narrative Weeks		
Reason Days		
View Calendar Approve Hours		- 1
Cost Centre		
Project Y		
Return To Work Interview		
Interview has taken Place		=11
Narrative		
Balances		
Name Total Taken Booked Balance		

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.

🖄 CoreTime 15.3.2						
Action Edit Block Field	i Record Query Navigate E	jelp <u>W</u> indow				
🥳 Record Absence Detai	ls					≚ ×
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					UNC	
Selection Uniteria				huna 2000	huku 2000	August 2000
Work Group					JULY 2009	August 2009
Department	List of Pay Codes (2000)		< ×	BH 02 03 04 05 06 07	01 02 03 04 05	01_02
Person P0102558			>	08 09 10 11 12 13 14	06 07 08 09 10 11 12	BH 04 05 06 US 08 09
Start 2009	Find %			22 23 24 25 26 27 28	20 21 22 23 24 25 26	FL 18 19 20 21 22 23
Active Employees				29 30	27 28 29 30 31	24 25 26 27 28 29 30
	Pay Code					
Absence Details	Annual Leave	1010		September 2009	October 2009	November 2009
Pay Code	Ante-Natal Appointment	1026		MTWTFSS	MTWTFSS	MTWTFSS
Start/End	Appointments	1012	ays			
Narratino	Bank Holiday	1014	eke	FL AL AL AL AL 19 20	MC 13 14 15 16 17 18	09 10 11 12 13 14 15
	Certified Sick Leave	1028	CRO	ALALALALAL 26 27	19 20 21 22 23 24 25 BH 27 28 29 30 31	
Reason	College_Day Release	1025	s	20 23 12	Di 27 20 28 30 31	30
View Calendar	Compassionate Leave	1015	irs			
Cost Centre	Conference Leave	1034		December 2009	January 2010	February 2010
Droinst	Flexi Leave	1020	F	MTWTFSS	MTWTFSS	M T W T F S S
Project	Force Majeure Leave	1024			01 02 03	08 09 10 11 12 13 14
	Leave Of Absence	1027			11 12 13 14 15 16 17	15 16 17 18 19 20 21
Return To Work Int	Offsite Meeting	1018		21 22 23 24 ch ch 27 28 29 30 31	25 26 27 28 29 30 31	22 23 24 25 26 27 26
Interview has taken	Parental Leave	1016				
Narrative	Paternity Leave	1022				
	Saturday Hours	1029		March 2010	April 2010	May 2010
Balances	Study Leave	1023			01 02 03 04	01 02
Name	Training	1013	e o	08 09 10 11 12 13 14	05 06 07 08 09 10 11	03 04 05 06 07 08 09
ANNUAL LEAVE	Uncertified Sick Leave	1011		22 23 24 25 26 27 28	12 13 14 15 16 17 18	10 11 12 13 14 15 16
Flexitime Balance for Per-				29 30 31	26 27 28 29 30	24 25 26 27 28 29 30
	Eind	QK Cancel				31

Coroon 2 2 2 1 1 -+ -	f Day Codes available	to administrate				

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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.

CoreTime 15.3.2			
ction Edit Block Field Record Query Navigate Help Window			
$\hat{\hat{m{g}}}$ Record Absence Details . Details which is a subscriptly be	***********************		000000000000000000000 🗹 🗙
	TAF338 C(OR <mark>C</mark>	
Selection Criteria			
Work Group 🚺	June 2009	July 2009	August 2009
Department 🚺	BH 02 03 04 05 06 07	M T W T F S S 01 02 03 04 05	01 02
Person 🚺 💷	08 09 10 11 12 13 14 FL 16 17 18 19 20 21	06 07 08 09 10 11 12 13 14 15 16 FL 18 19	BH 04 05 06 US 08 09 10 11 12 13 14 15 16
Start 2009 June 🗸 >	22 23 24 25 26 27 28	20 21 22 23 24 25 26 27 28 29 30 31	FL 18 19 20 21 22 23
Active Employees O All Employees		1. 10 10 00 01	31
Absence Details	September 2009	October 2009	November 2009
Pay Code 1010 🕅 Annual Leave	MTWTFSS	MTWTFSS	MTWTFSS
Start/End 14-JAN-2010 🕅 14-JAN-2010	01 02 03 04 05 06 07 08 09 10 11 12 13	01 02 03 04 AL 06 07 08 09 10 11	01 02 03 04 05 06 07 08
Narrative .14 Weeks	FL AL AL AL AL 19 20 AL AL AL AL AL 26 27	MC 13 14 15 16 17 18 19 20 21 22 23 24 25	09 10 11 12 13 14 15
Reason 1.00 Days	28 29 FL	BH 27 28 29 30 31	23 24 25 26 27 28 29
View Calendar Approve 6.30 Hours (M)			
Cost Centre	December 2009	January 2010	February 2010
Project 🔰	01 02 03 04 05 06	01 02 03	01 02 03 04 05 06 07
	07 08 09 10 11 12 13 14 15 16 17 <u>18 19</u> 20	AL AL AL AL AL 09 10 AL AL AL AL AL 16 17	08 09 10 11 12 13 14 15 16 17 18 19 20 21
Return To Work Interview	21 22 23 24 CH CH 27 28 29 30 31	18 19 20 21 22 23 24 25 26 27 28 29 30 31	22 23 24 25 26 27 28
Interview has taken Place			
Narrative	March 2010	April 2010	May 2010
Balances	MTWTFSS	MTWTFSS	MTWTFSS
Name Total Taken Booked Balance		01 02 03 04 05 06 07 08 09 10 11	01 02 03 04 05 06 07 08 09
ANNUAL LEAVE D 23.50 21.00 0.00 2.50	15 16 17 18 19 20 21 22 23 24 25 26 27 28	12 13 14 15 16 17 18 19 20 21 22 23 24 25	10 11 12 13 14 15 16 17 18 19 20 21 22 23
Plexitime Balance for Personnel H .00 .00 4.45	29 30 31	26 27 28 29 30	24 25 26 27 28 29 30 31

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 (\blacksquare).

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)

<u>ALL OF THESE STEPS MUST BE COMPLETED BY 9.30AM EVERY WEDNESDAY</u>. 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 <u>Section 4</u>.

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 <u>Section 2</u> 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 <u>Section 3.2.1</u>.

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 <u>Section 3.2.2</u>.

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 <u>Section 3.2.1</u>.

Instructions on how to complete this step can be found in <u>Section 3.2.3</u>.

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 <u>Section 3.2.1</u>.
- 2. Any leave not entered into CORE Time and Attendance should be notified to the administrator.

3.1.3 WEEKLY CHECKLIST

		Weekly Administration Checklist	
	****	*********	
	** PL **	EASE 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	Γ
2		Identify Records Requiring Amendments	_
	2.1	Approve the entries in white on Approve Hours screen	<u> </u>
	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 <u>Section 2.2</u>.

3.2.2 IDENTIFY RECORDS REQUIRING AMENDMENT

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

🖄 CoreTime 15.3.2		
Window		
🙀 Approve Hours		i × ≚
Hours		
Person Period Start Date	Pay Code Mon Tue Wed Thu Fri Sat	Sun Total Approve
	g Selection Criteria	
	Calestian M	
	User Defined Calendar	
	Calendar	R
	Employees	
	Work Group(s) <u>Y</u> 🗌 All	
	Department(s) 🚺 🗌 All	
	Person(s) 🚺 🗆 All	
	Hours	
	Username 🚺 🗆 All	
	Pay Code(s) 🏹 🗆 All	
	Cost Centre(s) 1 All	
	C Exceptions	
	Require Signoof	
	Date Range	5 R III
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Refrech Report		┙┛
Reiresti Kebort		

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

Sat Sun	Total Appro 32.30 . 42 . 32.30 . 1.18 . 32.30 . 13.00 . 19.30 .
Sat Sun	Iotal Appro 32.30 .42 .32.30 1.18 .32.30 .1.18 .32.30 .13.00 .19.30
3.15	32.30 .42 32.30 1.18 32.30 13.00 19.30
3.15	.42 . 32.30 . 1.18 . 32.30 . 13.00 . 19.30 .
3.15	32.30 . 1.18 . 32.30 . 13.00 . 19.30 .
3.15	32.30 . 13.00 . 19.30 .
3.15	13.00 . 19.30 .
3.15	19.30
	40.00
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	13.00 🗖.
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	□.
0.45 0.45	549.24
9.45 9.45	340.31
	945 945

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.

Clockings Mon	Tue	Wed	Thu	Fri	Sat	Sun	
05/10/09	06/10/09	07/10/09	08/10/09	09/10/09	10/10/09	11/10/09	
A 08:58	A 09:23	A 08:58	A 09:00	A 09:06			Calculate
M 13:00	A 13:00	M 13:00	A 13:00	A 13:00			
M 14:00	M 14:00	M 14:00	M 14:00	M 14:00			Allocate Week
M 16:00	M 17:11	M 17:30	M 17:49	M 17:23			

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

Pay Co	des /	Hou	IIS		T. T			Dire:	- 0-4	_ e		Ann.
Pay Code	•		VMon VTue VWeb VTue VFri Sat Sun App Main Pay 1 66/0.09 66/0.09 66/0.09 66/0.09 99/0.09 10/0.09 Total AI Main Pay 1 6.02 6.03 6.03 6.03 6.03 6.03 6.03 6.03 6.03 32.02 1 Flexitime Plus 18 1.02 1.19 47	All								
101	М		Main Pay 1	6.02	6.30	6.30	6.30	6.30			32.02	
1001	M		Flexitime Plus		.18	1.02	1.19	.47			3.26	
1002	M] 🔽	Flexi Negative	.28							.28	
		12										
		12										
		12										
		12										
		12										
		17										
Total				6.30	6.48	7.32	7.49	7.17	.00	.00	35.56	

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.

-0	Mon 05/10/09	Tue 06/10/09	Wed 07/10/09	Thu 08/10/09	Fri 09/10/09	Sat 10/10/09	Sun 11/10/09	
	A 08:58	A 09:23	A 08:58	A 09:00	A 09:06			Calculate
	M 13:00	A 13:00	M 13:00	A 13:00	A 13:00			
	M 14:00			Allocate Week				
	M 16:00	M 17:11	M 17:30	M 17:49	M 17:23			

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 <u>Section 3.2.1</u>.

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.

1005	M	(7	Core Time Infringement			4.00
Screen 3.2	2.8: T	he lis	st of values button on the Maintain Hours scree	Pn.		

vlainta

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.

Clockings Mon	Tue	Wed	Thu	Fri	Sat	Sun	
05/10/09	06/10/09	07/10/09	08/10/09	09/10/09	10/10/09	11/10/09	
A 08:58	A 09:23	A 08:58	A 09:00	A 09:06			Calculate
M 13:00	A 13:00	M 13:00	A 13:00	A 13:00			
M 14:00	M 14:00	M 14:00	M 14:00	M 14:00			Allocate Week
M 16:00	M 17:11	M 17:30	M 17:49	M 17:23			

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 <u>Section 3.2.1</u>.

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.

1005	M	Core Time Infringement			4.00
Screen 3.2	2.10: T	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.

🙀 Maintain Ho	urs 1000000			
	↓←→	🎽 🐄 🗈	V? 16 6	
Selection	Criteria		_	
Period	200941	05-OCT-2009 1	1-OCT-2009	< >

Screen 4.2.1: The Date Navigation buttons.

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

/ Pay Codes / Hours							
r dy coucor noun	Mon	✓ Tue	V Wed	🗹 Thu	🗹 Fri	Sat	Sun
Pay Code	05/10/09	06/10/09	07/10/09	08/10/09	09/10/09	10/10/09	11/10/09
Screen 4.2.2: Days are locked with the tick box o	above th	e 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.

Clockings Mon	Tue	Wed	Thu	Fri	Sat	Sun	
05/10/09	06/10/09	07/10/09	08/10/09	09/10/09	10/10/09	11/10/09	
A 09:16	C 09:25	A 09:51	A 09:24	A 09:33			Calculate
M 13:00	M 13:00	M 13:00	M 13:00	M 12:45			
M 14:00	M 14:00	M 14:00	M 14:00	M 13:55			Allocate Week
M 17:11	M 17:05	M 17:23	M 17:35	M 18:10			

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).

Work Gr	oup (N .	Pay Codes (2000) 2000 2000	×
Departm	ent [<u>¥</u>		
Person	[<u>v</u>	Find %	
				Name	Code
Pay Co)des /	Hou	rs	Annual Leave	1010
Pay Code	э			Ante-Natal Appointment	1026
101	M	1	Main Pay 1	Appointments	1012
1001	M	7	Flexitime Plus	Approved Absence	1009
1003	M	17	Lapsed Time_Not Counter	Bank Holiday	1014
1005	м	7	Core Time Infringement	Certified Sick Leave	1028
1016	M	17	Parental Leave	Christmas Holidays	1030
		N		College_Day Release	1025
		N		Compassionate Leave	1015
		Ē		Conference Leave	1034
		Ē		Core Time Infringement	1005
L		تعار		Exam Leave	1031

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.

🙀 Balance Adjustments 💈				
		1	M 10	
Selection Criteria				
Person] 🔽 📃			
Balance] 🔽 📃			
Period				

Screen 4.2.5: The Selection Criteria section.

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

riod	Date Effective	Start Date	End Date	Affecting Element	Adjustment Narrative	
	<u>V</u>	<u>\</u>				
					▼	
	NT .					
	N	17			-	1

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.

Current Balances Name	Reserved Floating	Accrued	C/F	Taken	Balance	Booked

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.

🙀 Person Maintenance 🕬			000000000000000000000 🗹 🗙
	🗄 🗑 🥈 🖄 🖬 🖻 🕅 👘	б 🗾 🔳	AF001 CORC
Person Maintenance Person		Select Detail General - 1	
Group Shift Type	FLEXI FULL TIME	General - 2 Current Balances Balance Setup	
Dept. S079 Calculate Employees	HUMAN RESOURCES	Badge Details Shift Types	
General - 1 Pers. Type <mark>P</mark>	PERMANENT	P.I.N.	
Job Title 0506	H.R.I.S. ANALYST	Mailbox	
Location 3	ADMINISTRATIVE STAFF	Generate Overtime 🔽	Site-Status 🗌 Off-Site
Cost Cen. 6050	HUMAN RESOURCES - GENERAL	Maintain Clockings 🛛 🔽	Maintain Holidays 🔽
Expenses		Balance Pay Code	
Supervisor		Basic Pay Code	
Job		OT Pay Code	

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.

Balance Setup	Type Segment	Enable New Balance
Active Flexitime		View Entitlement History
Entitlement Codes		
Reserved 1	Length of Service	
Floating 🚺	Percentage	
Accrued	Make-Up Overtime	
Balance 🕅 🏹		
		/

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.

🦉 Activate Persor	nal Balances 🔅			*****************	
			N 16 0		TAF213
Selection Cr	iteria			Linked Bala	ances
Balance Code					
Period					
Work Group					
Department					
Person	P01025589	John Molloy			
Starting Valu	100				
< Entit	lement	> Carried			
Reserved	Floating A	ccrued Forward	Taken B	alance Booked	
					Calc. Entitlement
Entitlement	Codes		Ba	lance Type	
Reserved Entitlement	N	Accrued Entitlement	СН	lours 🖲 Days	O occurrences
Floating	N	Balance	NY Ba	lance Segment	
		_		ull OHalf ®Qu	arter ONone
Service	<u></u>	Percentage	100.00	ОК	Clear

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.

Active Flexitime	View Entitlement History
Entitlement Codes	
Reserved Le	ngth of Service 🚺
Floating Y Per	rcentage
Accrued Ma	ake-Up Overtime
Balance	

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.

🦉 Activate Persoi	nal Balances 🔆				
		10 13 13 Pa	N 10 O		TAF213
Selection Cr	iteria			Linked Balance	s
Balance Code					
Period					
Work Group					
Department					
Person	P01025589	John Molloy			
Starting Val Comparison Entitle Reserved Entitlement Reserved	Lies Floating Ad Codes	Carried ccrued Forward	Taken B Ba	alance Booked Cal Iance Type Iours © Days C	c. Entitlement
Entitlement Floating Entitlement		Entitlement Balance	Ba	lance Segment juli O Half © Quarter	n O None
Length of Service	<u>N</u>	Percentage 10	00.00	ОК	Clear

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

dge	No. 1	Badge Issue	Date Expiry Dat	e Group	Name			Override
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						N	FT P	
						N	e i	
						N	e i	
						N		
						N		· ·
					ī	N		s 🗖
					1	N		s 📕
					1	N		s 📕
					1	N		s 📕 🖓

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.

CoreTime 15.3.2	× 36600666666666666666666666666666666666
:	
	Default Terminal not set up on system Parameters. Press continue to use a default terminal of 0101
	<u>Continue</u> Cancel

• 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.

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Maintain	Person S	hift Type ——								
Person									View New Patte	rns
					Start					
ihift Type	Name	•		Date Effective	e Seq.	Cycle				
ADM_PE	🚺 (DOR	MANT) ADMINISTR	ATION_PERSON	26-MAY-2008		<u>V</u> 🗆. 🗌	Personal Overr	ide 🔄 🔺	Reset Pattern:	S
ADM_PE	CDOR	MANT) ADMINISTR	ATION_PERSON	08-JUN-2009		🕎 🗆. 🔄	Personal Overr	ide 🚽 🖉		
FLXFT	FLEX	I FULL TIME		30-JUL-2009] 🔽 🔄 1	🕎 🗹. 🔄	Personal Overr	ide 📃 💌	Current Period	k
Shift Patt	erns									
Shift Type		Start Date	Mon	Tue	Work Pa Wed	atterns Thu	Fri	Sat	Sun	
FLXFT	200935	24-AUG-2009	FLXFT	FLXFT	FLXFT	FLXFT	FLXFT	REST	REST] [
FLXFT	200936	31-AUG-2009	FLXFT	FLXFT	FLXFT	FLXFT	FLXFT	REST	REST	ĺ
			EL MET	EL MET	and a summer	and a summ	and the second			1
FLXFT	200937	07-SEP-2009	FLXFT	FLXFT	FLXFT	FLXFT	FLXFT	REST	REST	
FLXFT FLXFT	200937 200938	07-SEP-2009 14-SEP-2009	FLXFT	FLXFT	FLXFT	FLXFT	FLXFT	REST REST	REST	j
FLXFT FLXFT FLXFT	200937 200938 200939	07-SEP-2009 14-SEP-2009 21-SEP-2009	FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT	REST REST REST	REST REST REST	j G j
FLXFT FLXFT FLXFT FLXFT	200937 200938 200939 200940	07-SEP-2009 14-SEP-2009 21-SEP-2009 28-SEP-2009	FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT	REST REST REST REST	REST REST REST REST	
ELXFT ELXFT ELXFT ELXFT ELXFT	200937 200938 200939 200940 200941	07-SEP-2009 14-SEP-2009 21-SEP-2009 28-SEP-2009 05-OCT-2009	FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT	REST REST REST REST REST	REST REST REST REST REST REST	
FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	200937 200938 200939 200940 200941 200942	07-SEP-2009 14-SEP-2009 21-SEP-2009 28-SEP-2009 05-OCT-2009 12-OCT-2009	FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	REST REST REST REST REST REST	REST REST REST REST REST REST	
FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	200937 200938 200939 200940 200941 200942 200943	07-SEP-2009 14-SEP-2009 21-SEP-2009 28-SEP-2009 05-OCT-2009 12-OCT-2009 19-OCT-2009	FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT FLXFT	REST REST REST REST REST REST	REST REST REST REST REST REST REST	

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 <u>must</u> 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.

ersonal Override Patterns eq.													
o.	Mon	Tue	W	ed	Thu	Fri	Sat	Sun					
		7		1	N7	N7	N7	N (
		¥	<u>N</u>	NY .	N								
		8	NT I	N7	N7								
		W .		N7	N7								
		1	<u>N</u> 7	<u>N</u>	N7		NT						
		8	NT I	N7	N7			NY I					
		¥ .	NT I	N7	N7			- IV .					
				Save		Exit							

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.

Pers	onal Overrid onal Over	le effec ride P	tive from 0 atterns	15-Nov-2	009 202									000000000
No.	Mon		Tue		Wed		Thu		Fri		Sat		Sun	
1	FLXFT		FLXFT	7	FLXFT	17	REST		REST		REST		REST	T 🕅 🙆
2	REST	7	REST	7	FLXFT	7	FLXFT	7	FLXFT	7	REST	- <u></u>	REST	17
		12		N				<u>N</u> ?				<u>N</u> 7		
		M		N7		N		<u>N</u>		NT .		<u>N</u>		
		11		<u> </u>		<u> </u>		<u> </u>		<u> </u>		<u> </u>		
		N.		<u>N</u> ?		<u> </u>		<u>N</u>		N.				
		N.		<u>N</u> ?				<u>N</u> ?		N.				N 🖸 🗔
					[Save		[E×it					

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.

e Start Date	End Date	Affecting Element	Adjustment Narrative	
			•	
			v	
	e Start Date V V V V V V V V V V V V V	e Start Date End Date	e Start Date End Date Affecting Element	Start Date End Date Affecting Element Adjustment Narrative N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start Date Image: Start Date N Image: Start Date Image: Start

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.

Current Balances Name	Reserve	d Floating	Accrued	C/F	Taken	Balance	Booked

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.

Current Balance	2000000		*******				
	← → E	1 🐨 🛛 🖄		\? 🛍 📋			TAF283
Current Balanc	ce						
Selection	V ?						Save This Selection
Work Group(s)	11 🔤						
Department(s)	11 🗌 🚺						
Person(s)	<u> 11</u> 🗌 🚺						
Balance	<u>V</u>						
Report Order		Person with	in Departmer	ıt		-	
Chart Type —							
Include Charts	□.	\bigcirc]		
Select a work grou end periods and the adjustment detail to	p, department e report order include	;, person, bal ing. Select th	ance code, s e amount of	tart and		ĺ	Run Report

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.

C	ORe	Flexitime Balance For Personnel Report University College Dublin 02-NOV-2009 11:53										
Departmen	t : 8079	Human Resourc	es									
Person	Name	Туре	Segment	Reserved Entl.	Floating Entl.	Accrued Entl.	Carried Forward	Taken	Balance	Booked		
P01		Hours	None	0.00	0.00	0.00	0.00	0.00	2.03	0.00		
P01		Hours	None	0.00	0.00	0.00	0.00	0.00	10.19	0.00		
P01		Hours	Half	0.00	0.00	0.00	0.00	0.00	13.09	0.00		
P01		Hours	None	0.00	0.00	0.00	0.00	0.00	0.22	0.00		
P01		Hours	None	0.00	0.00	0.00	0.00	0.00	8.24	0.00		
Summary o	f Balances by Depar	rtment										
Туре	Reserved Entl.	Floating Entl.	Accrued Entl.	Carried Forward	Taken	Balan	ce Bo	okeđ				
Hours	0.00	0.00	0.00	0.00	0.00	33.7	15	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.

		1912 Po 📢 🛍	1		TAF227
Balance Detail					
Selection 💟				Save This	Selection
Work Group(s)					
Department(s) 💟					
Person(s)					
Balance 🕎					
Start / End Period	<u>v</u>		N.	© Current	Period
Report Order	Person w	rithin Department		O <u>A</u> ll Perio	ds
Adjustment Detail					
Accrual	Decay	Timesheet	Length	of Service	Fransfer
Chart Type					
Include Charts	- .		00		
Select a work group, deg end periods and the repo	partment, person, k ort ordering. Select	alance code, start and the amount of		Run F	Report

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.

CORC Flexi	time Balan	ice For	Personnel	Detai	l Report		TAR227
Universit	ty College Dubli	n			02-NOV-20	09 12:06 Pag	e 4
Department : 8079 Ruman Reso	urces						
Person Name		Type Hours	Segment None	Resvd.	Entitleme Float. Acci	nt Codes	► Service
Period 200912 26-0CT-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 29-OCT-2009 1001 Flexitime Plus 30-OCT-2009 1001 Flexitime Plus	0.00 0.00 0.00	0.00 0.00 0.00	0.00 0.00 0.00	0.00 0.00 0.00	0.00 0.00 0.00	0.22 0.26 0.23	-0.26 0.00 0.23
Adjustments 30-0CT-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.

Flexitime Detail								
	← → [1 🐨	14 B	\? 🛍 (1 🚺			TAF228
Flexitime Deta	nil — — —							
Selection	<u>7</u> 7						Save This S	Selection
Work Group(s)	🛐 🗆 All							
Department(s)	<u> II</u> 🗆 All							
Person(s)	<u> N</u> 🗆 All							
Balance	<u>\</u>							
Start / End Perio	d	<u>\</u>			M			
		🗆 Include	e All Absence	e Details				
Report Order		Person w	rithin Departme	nt		-		
Chart Type								
	_] []	1	\sim		
Include Charts	L.							
Select a work group	o, department	t, person, b	alance code ar	nd start			Run Re	nort
and end periods. Th	ien select the	report ord	ering					

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.

Department 1 SOTO Period 200911 28-SEP-2009 to 25-OCT-2009 Previous Closing Balance 1.20 Current Opening Balance 1.20 Absence Infringe. Plexitime Balance Date In Out In Out In Out Description Absence Infringe. Plexitime Balance 12-OCT-2009 09:38 13:00 14:00 17:43 0.00 0.00 0.03 14:00:00 0.00	CC	R	e		Fle Univ	ers:	itime 1ty coll	Bala ege Dub	ance olin	For Personnel .	Detail Re 0	eport 2-NOV-2009	12:19 Page	TAR228
Person: Poil Period: 200911 29-SEP-2009 to 25-OCT-2009 Previous Closing Balance: 1.20 Current Opening Balance: 1.20 Absence Infringe. Plexitime Balance: Date In Out In Out In Out Description Absence Infringe. Plexitime Balance: Balance: 12-OCT-2009 09:38 13:00 14:00 17:43 0.00 0.00 0.03 13-OCT-2009 09:41 13:00 14:00 17:15 0.00 0.00 0.00	Department :	8079			HUHA	NR	ESOURCES							
Date In Out Description Absence Infringe. Plexitime Bala 12-0CT-2009 09:36 13:00 14:00 17:43 0.00 0.00 0.03 14:00 0.00 0.00 0.00 0.00 10:01 15:00:7:00 0:00 0.	Person : P Previous Clo	010 sing Ba	alance	1	1.2	0 0	Current	Opening	j Bala	Period : 200911 nce : 1.20	28-SEP-200	9 to 25-00	T-2009	
12-0CT-2009 09:38 13:00 14:00 17:43 0.00 0.00 0.35 13-0CT-2009 09:36 13:00 14:00 17:09 0.00 0.00 0.03 14-0CT-2009 09:41 13:00 14:00 17:15 0.00 0.00 0.04 5-0CT-2009 09:41 12:55 17:15 0.00 0.00 0.01	Date	In	Out	In	Out	In	Out	In	Out	Description	Absence	Infringe.	Flexitime	Balance
	12-OCT-2009 13-OCT-2009 14-OCT-2009 15-OCT-2009	09:38 09:36 09:41 09:37	13:00 13:00 13:00 12:57	14:00 14:00 14:00 13:55	17:43 17:09 17:15 17:15						0.00 0.00 0.00 0.00	0.00 0.00 0.00 0.00	0.35 0.03 0.04 0.10	0.40 0.43 0.47 0.57

Screen 7.2.6: The Flexitime Transaction report.