Lesson #6 - Manager Use of the Time Clock

Manage the Time Clock - An Overview

Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review **Time Clock Administrator - Required User Permissions**

One or more people in your organization should be selected to work with the Jackrabbit Time Clock.

Managing the Time Clock is a four-step process that should be completed in the following order:

1. **View time entries and resolve incomplete time entries**
2. **Approve or Unapprove time entries**.
3. **Close the pay period** (all time must be approved before a pay period can be closed).
4. Export to **Excel** to work with the data or export it to **Express Payroll** for payroll processing.

Jackrabbit only accepts a 12-hour format when entering time into the time fields. You will be prompted to enter the next digit and am or pm. ***Note:*** *when entering a single-digit number, you must either enter a "0" before the number or enter a ":" after the number.* ***Military time is not accepted!***

Frequently Asked Questions

Expand/Collapse All

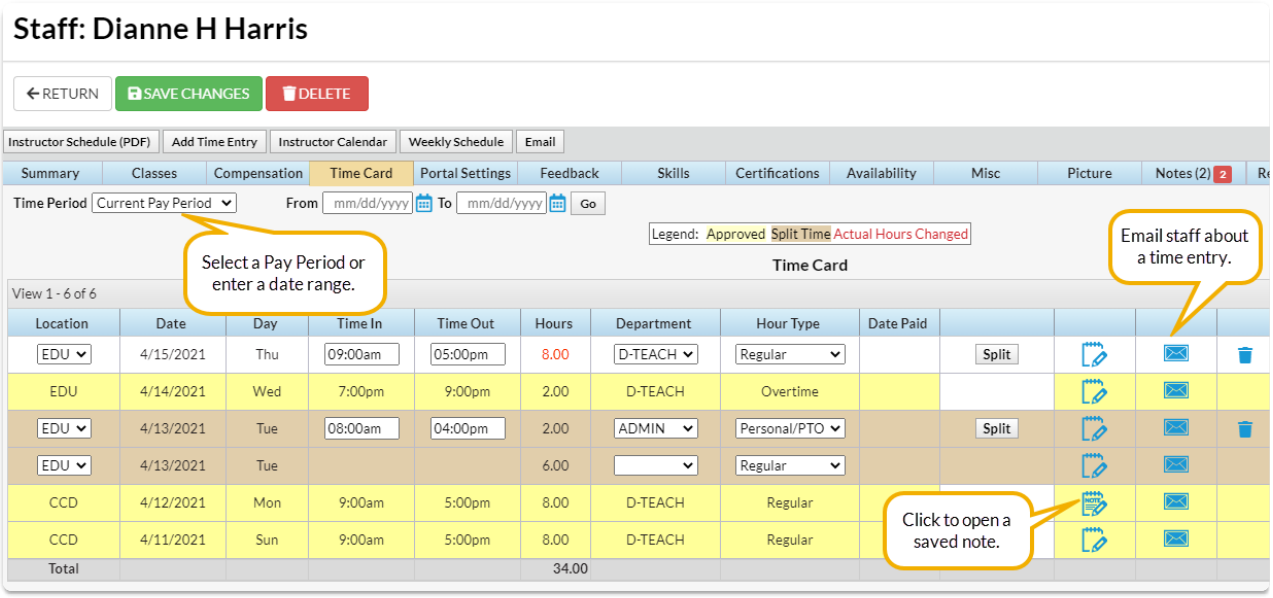
Manage the Time Clock Step 1 - Review Time Entries

If a Jackrabbit User has **appropriate permissions**, all time entries are viewable, for each staff member, under their *Time Card* tab.

Time entries that have been approved are highlighted in yellow. Hours that have been split are

highlighted in brown and when the hours are displayed in red, it indicates that the actual hours have been changed.

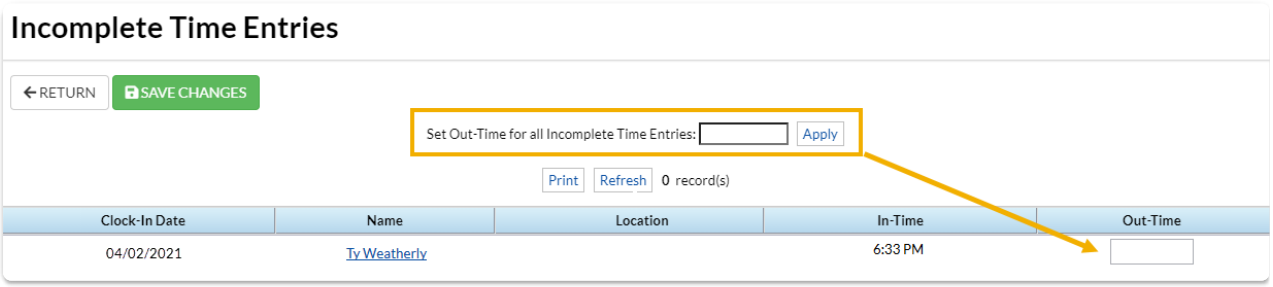
Time entries may also be viewed when **Approving Time** or using **Time Clock Reports**.



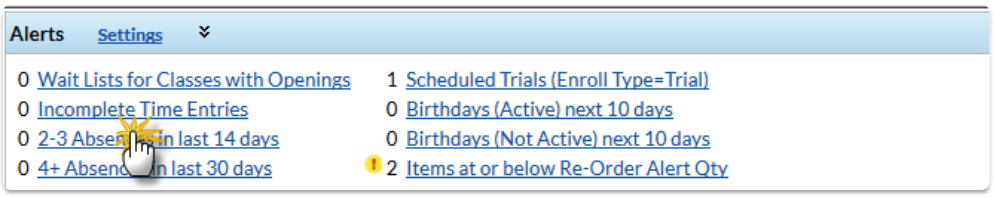
Incomplete Time Entries

Any staff person that doesn't have an out time for the day is considered an *Incomplete Time Entry*. To find *Incomplete Time Entries*, go to **Staff** (menu) > **Time Clock** > **Incomplete Time Entries**. It is important to go through these regularly to find staff with incomplete time entries.

You can either enter individual **Out Times** for each *Incomplete Time Entry*, or if all the *Incomplete Time Entries* checked out at the same time, enter the time in the **Set Out-Time** for all *Incomplete Time Entries* field. This is a global box, so all *Incomplete Time Entries* will be marked with this time. **Save Changes**.



Incomplete Time Entries are also displayed on the *Executive Dashboard* in the *Alerts* section. Clicking this link also opens the *Incomplete Time Entries* Report.



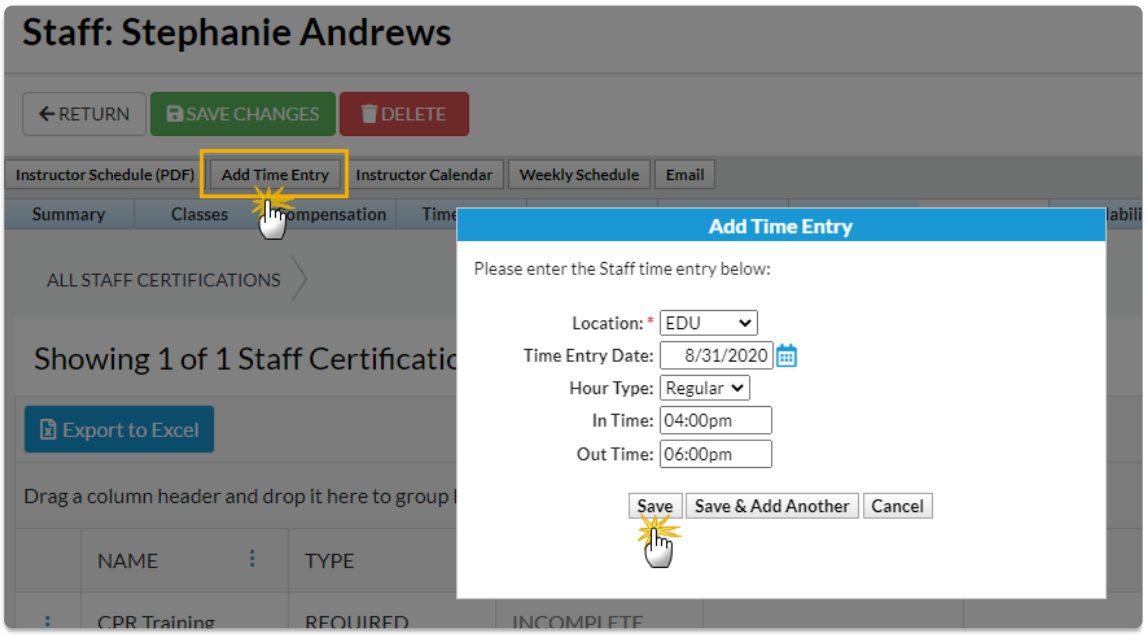
Frequently Asked Questions

Expand/Collapse All

Add a Time Entry from Within Jackrabbit

It's also possible to record a *Time Entry* while logged into Jackrabbit (without launching the Staff Portal). In order to do this, the user must have a Jackrabbit User ID (not just a Staff Portal Login ID) and have appropriate permissions for that *User ID*.

1. Go to the **Staff** (menu) > **Active Staff**.
2. Click the staff member's **name**.
3. Click the **Add Time Entry** button.
    - If the staff member has a *Manual In/Out* or a *Clock In/Out* time entry method, the *Add Time Entry* window displays with an In Time and Out Time field.
    - If the staff member has the *Total Hours* time entry method, the *Add Time Entry* window will offer a *Total Time* field.



4. After entering time, be sure to click**Save**. If prompted, click **OK**. The entered time will be recorded on the staff member's *Time Card* tab.

Manage the Time Clock Step 2 - Approve/Unapprove Time

In order to complete a pay period, it is necessary for all time to be approved. Time can be approved as soon as the time entry is created. If you have assigned *Managers* to *Departments*, you may decide to have the Managers approve time. They can choose to approve time in any frequency they prefer (daily, weekly, etc.), or they can wait and perform the approval process at the end of the pay period.

*If you pay instructors for the time before or after class/day/time entry, be sure you set a*Time Buffer. See the **Time Clock: Time Entry Settings**topic for details on setting a Time Buffer

Approve/Unapprove Time Entries

Follow these steps to walk through the time entry approval process.

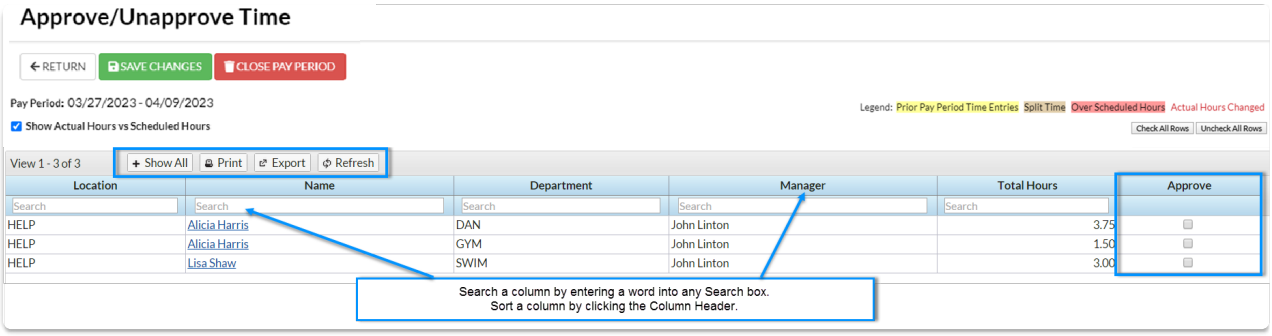
1. Point to **Staff** (menu) > **Time Clock** > **Approve/Unapprove Time.** If needed, filter your search by selecting **criteria** from the *Search Criteria* section.
2. Select a **Display Setting**.
3. Click **Preview Staff Hours**.
4. Click the **Note** (icon) if any contain the word Note so that you can read any messages left by staff.
5. Use the **Email** icon to email staff members any questions you may have.
6. **Make changes** to time if necessary.
7. Approve hours by clicking the**Approve** checkbox for each entry or use**Check All Rows** to approve time globally.
8. Click **Save Changes.**

Display Settings

Display Settings offers three choices.

Staff Summary

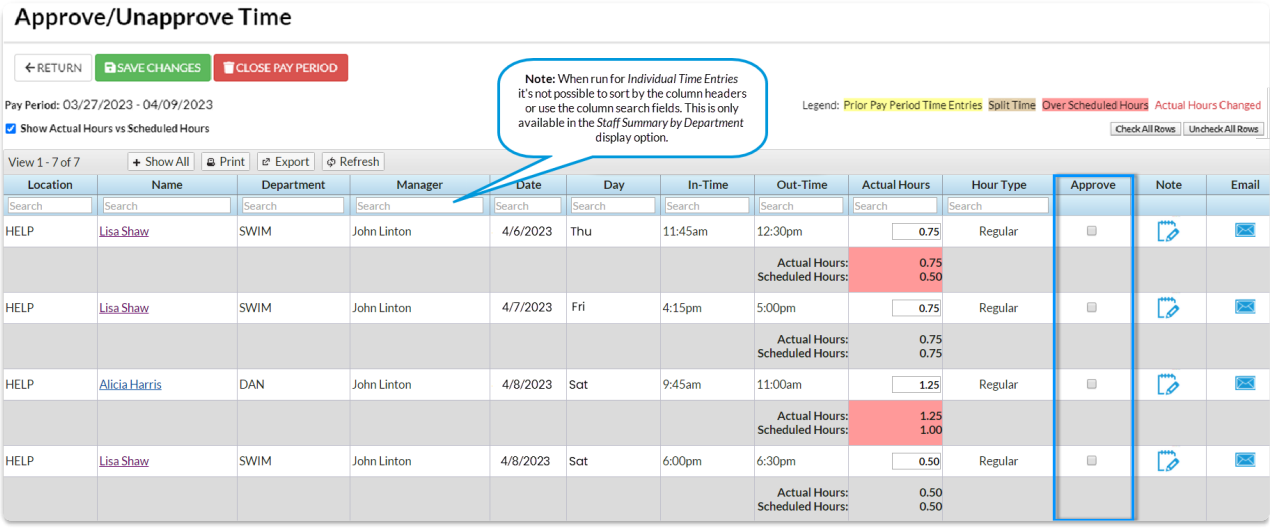
This displays the total hours per staff person per department.



Individual Time Entries

This displays the in/out times and the actual number of hours worked for each time entry.

When the *Individual Time Record* option is selected, the *Show Actual vs. Scheduled Hours?* and the *Find Time Entries from prior pay periods?* fields become active. If *Show Actual vs. Scheduled Hours?* is set to *Yes*, the result will indicate both the *Actual Hours* and the hours a staff person was scheduled to work. If *Actual Hours* are higher than *Scheduled Hours*, this field will display red in the report, alerting you there may be an overage/problem with this time entry.



Scheduled Time is determined by adding the class duration for any instructor's class. It is very important for Classes to be entered correctly in order for *Scheduled Time* to calculate correctly. The following must be entered for each class and is entered from the Class page.

- Status=Active
- Start Time & End Time (in format 4:00pm)
- Class Meets (a day must be checked)
- Class must have students enrolled.
- Class must have instructors listed under the Instructor tab.

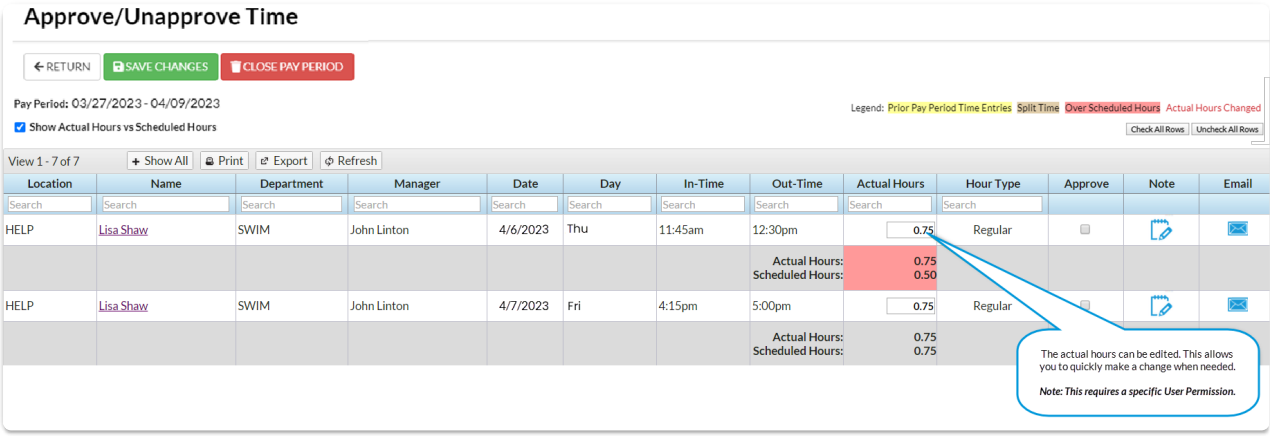
***Tip:** Verify this information is correct for all classes by using Classes > Edit All Classes.*

If *Find Time Entries from prior pay periods?* is set to *Yes*, any unapproved time entries in previous pay periods will also display.

Edit Time from Approve Time

With the appropriate permissions, a User can edit staff*Actual Hours while in Approve Time*. This allows the user to make changes to the actual hours worked without having to edit the original in and out times and without going into the individual staff person's time clock tab.

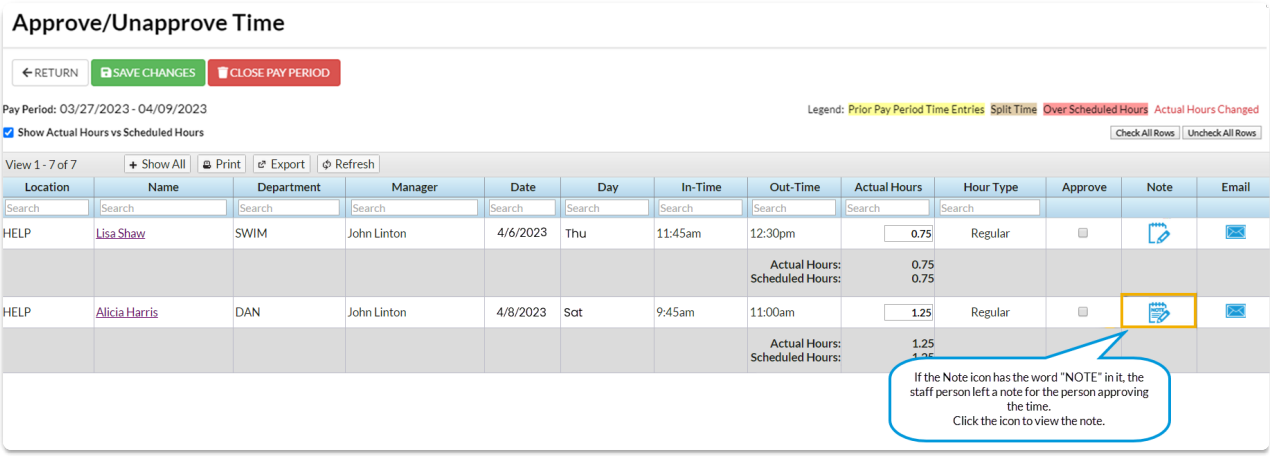
To give this permission to a user, ensure that**Edit Actual Hours in Approve Time**is checked in the **Gear** (icon) > **Settings** > **Users & Permissions** for this user.



***Tip:** The clock recognizes minutes are a portion of an hour and computes them accordingly. Example: Zippy clocked in at 3:46 pm and clocked out at 4:04 pm. He worked 8 minutes; so Jackrabbit calculates the partial hour as 8 minutes / 60 minutes and displays the result as .13. (8 / 60 = .13).*

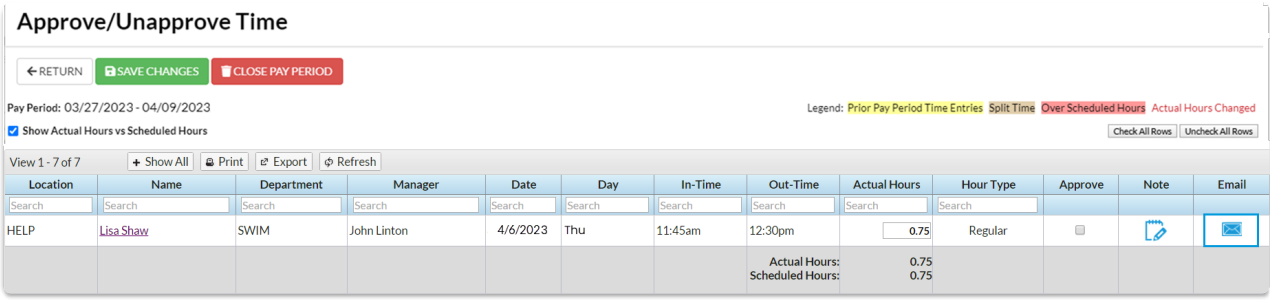
View a Note

If a note has been added to a*Time Entry* by a staff member, the Note icon will display with the word "NOTE" in it. Click the icon to view the note.

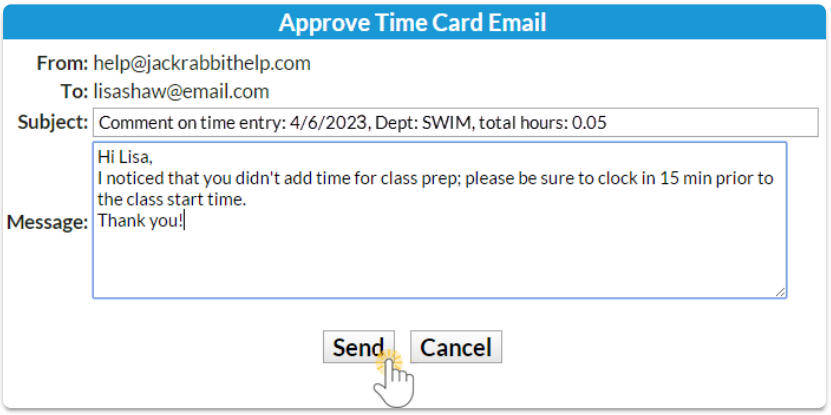


Send an Email

To email the staff member directly about a time entry, click the envelope icon to the right of the entry.



Add your email message in the*Approve Time Card Email* box and click**Send**.



After all time is approved for a pay period, you can close the pay period. See**Close Pay Periods.**

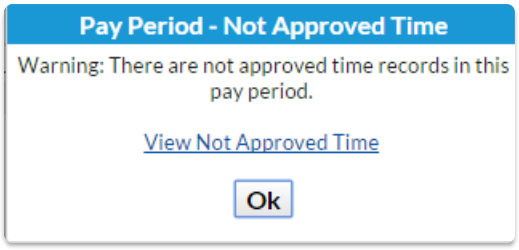
Frequently Asked Questions

Expand/Collapse All

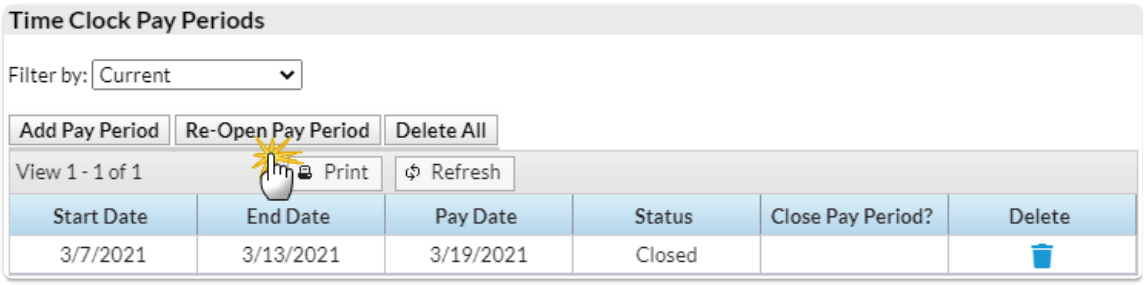
Manage the Time Clock Step 3 - Close Pay Periods

After all hours within a pay period have been approved, the pay period should be closed. The process of closing the pay period marks all hours as being paid with a Paid Date.

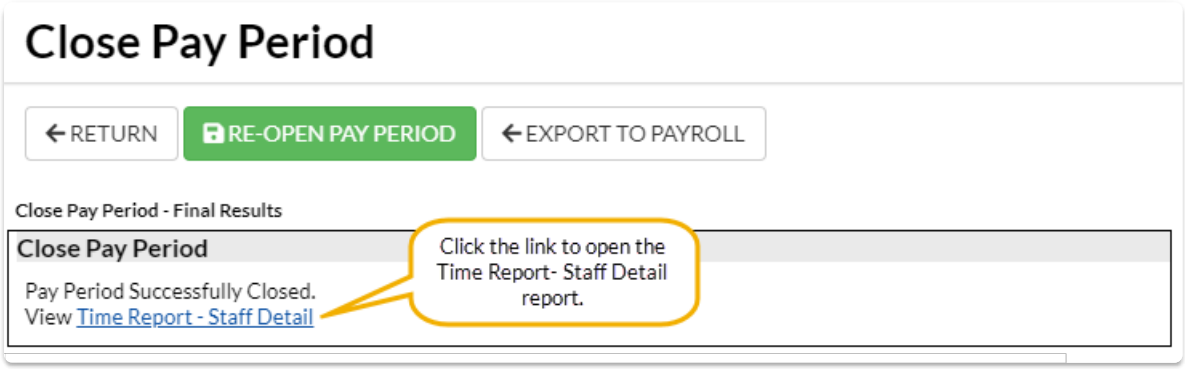
1. Go to the**Staff** (menu) >**Time Clock** >**Close Pay Period.** ***Tip:*** *There is also a* Close Pay Period *button on the* Approve/Unapprove Time *page.*
2. Select the**Pay Period**.
    - If you'd like the report to display any unpaid time entries prior to the selected pay period, select **Yes** in the *Find unpaid time entries dated prior to this pay period?* field.
3. Click **Preview Staff Entries to Close.**
    - A pop-up warning message opens if there are hours within the pay period that haven't been approved. If this alert pops up, click the **View Not Approved Time** link within the pop-up to view and approve the time.



- If necessary, you can re-open a Pay Period by going to **Staff** > **Staff Portal** > **Portal Settings**. Click the **Re-Open Pay Periods** button in the **Time Clock Pay Periods** section.



6. Select the **Pay Date** in the **Re-Open Pay Period** window.
7. Click **Re-Open Pay Period**. Click **OK** in the warning window.
8. Preview the hours listed by ensuring the **Process** checkboxes in the last column are checked.
   - When satisfied with the list, click **Confirm Staff Entries to Close**.
9. Change the **Pay Date** if necessary.
10. Click **Close Pay Period**. If prompted, click **OK**.



After you've closed the pay period, you can export it to payroll. See Export to **Express Payroll** or **Excel (CSV File)**.

Frequently Asked Questions

Expand/Collapse All

Manage the Time Clock Step 4 - Export

Review the article below for the Time Clock export method your organization uses.

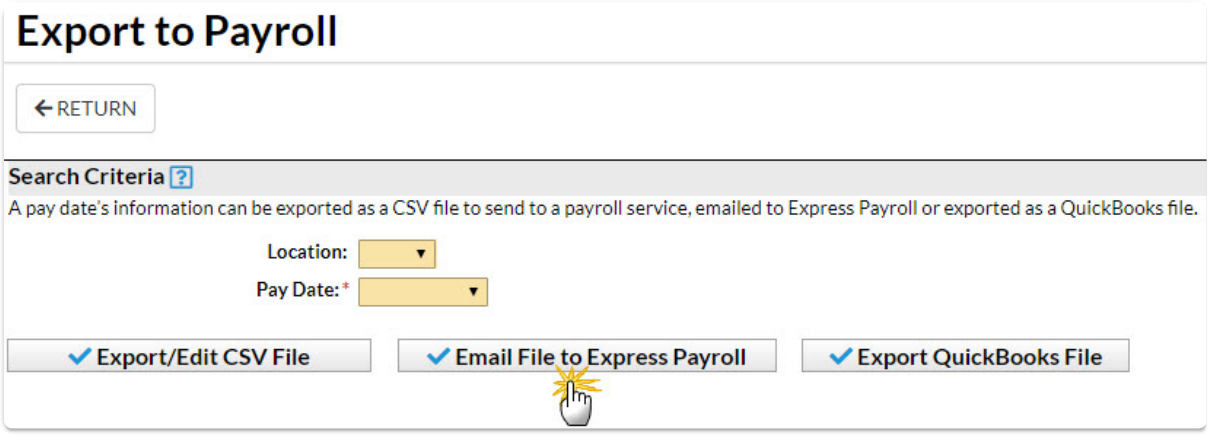
Manage the Time Clock Step 4 - Export to Express Payroll

To use this feature, you must be an **Express Payroll** client. Jackrabbit recommends *Express Payroll* due to the flexibility of unlimited custom pay rates which support Jackrabbit *Departments*. Jackrabbit can create a CSV file to export at the end of each pay period. This file is specifically formatted to enable import into the *Express Payroll* payroll system.

If you are using Express Payroll, be sure you've read through **Express Payroll** information in the **Export Settings** topic before attempting your first export.

Export to Express Payroll

1. Go to the **Staff** (menu) > **Time Clock** and click **Export to Payroll**.
   Note: There is also an Export to Payroll button on the **Close Pay Period** page.
2. Select a **Location** and a **Pay Date** from the drop down choices.



3. Click **Email File to Express Payroll.** In the *Email Express Payroll* pop-up box, notice the *Subject Line* includes the name of the Org, Org ID, and the Pay Period Ending Date. This line is not editable.
   - Alternatively, if you need to make updates to the CSV file, click **Export/Edit CSV File**. Open the file and select the option to save the file to your computer. Make updates as needed and email to Express Payroll.
     Note: We recommend you create a special folder on your desktop to help keep these files

organized.

4. Add a **message** if applicable. For example, you can enter any pay rate changes and other important information in the message area.
5. Select applicable email addresses for **Send Additional Emails To**. We recommend that you include your own email address, so you can keep a copy for your records.
6. Click **Send**.

Related Section

This section should be used when you need to modify and provide staff details and additional payroll information to Express Payroll.

Export Staff Details

Payroll Codes

Manage the Time Clock Step 4 - Export to Excel (CSV File)

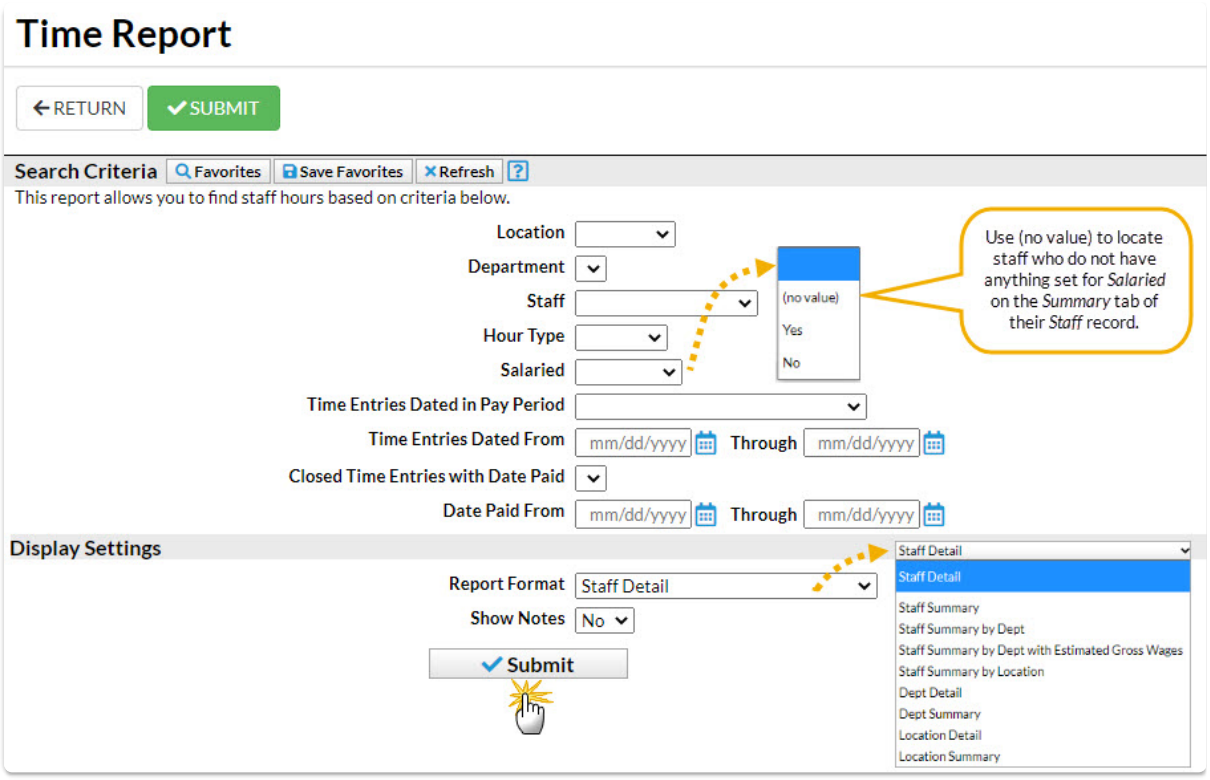
If you are not using *Express Payroll* or *QuickBooks*, it is still possible to use *Export to Payroll*. In order to have hours by *Department*, export to an Excel CSV file. Click the **Export CSV File** button, download and save the file.

Time Report

The *Time Report* displays hours by *Location* and *Department*. With nine different display options, you can view your staff hours in a variety of formats.

Run a Time Report

1. Point to the **Staff** (menu) > **Staff Reports** > **Time Report**.
2. Select **Search Criteria**.
3. Select **Display Settings.** (See a brief explanation of each of the 9 display formats below.)
4. Click **Submit.**



Display Settings

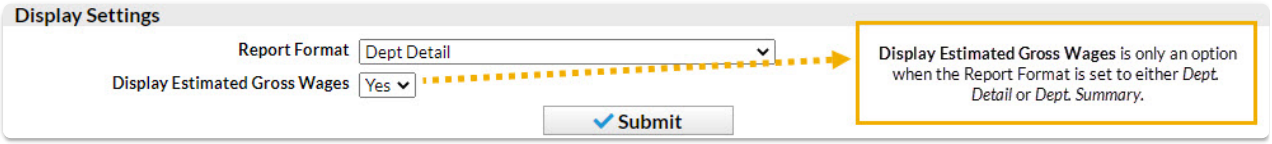
There are nine display formats:

Staff Detail	Displays each staff person's time entries including the following: Location, Department, In and Out Times, Hour Type, and Total Hours.
Staff Summary	Summarizes all staff time. Includes: Staff Last Name, Staff First Name, and Total Hours.
Staff Summary by Department	Breaks out total hours by Department and staff members in each department.
Staff Summary by Dept with Estimated Gross Wages	Breaks out total hours by Department and staff members in each department with pay rate and estimated gross wages.
Staff Summary by Location	Breaks out total hours by location and staff members in each location.

Department Detail	Groups by Department and displays the following information: Location, Staff First Name, Staff Last Name, Hour Type, and each individual time entry Total Hours. There is also an option to view Estimated Gross Wages.
Department Summary	Groups by Department and displays the following information: Location & Total Hours. Option to view Estimated Gross Wages.
Location Detail	Groups by Location the following information: Departments, Staff First Name, Staff Last Name, Hour Type, and Total Hours.
Location Summary	Groups the department total hours worked per location. Displays Dept, Total Hours, and Estimated Gross Wages.

Estimated Gross Wages

The option to display *Estimated Gross Wages* is only available using the *Department Detail* and *Department Summary* formats.



Estimated Gross Wages is also reported on the *Staff Summary by Dept with Estimated Gross Wages*. This is called estimated because the Time Clock does not calculate overtime dollars, only regular hour dollars. Jackrabbit also does not calculate any withholdings, deductions, or payroll taxes.

The estimated gross wage calculation is based on the hours the staff person enters into the time clock multiplied by the appropriate pay rate. If *Department Pay Rates* were entered, Jackrabbit matches up the *Time Entry Department* with the *Department Pay Rate*. If a *Time Entry* doesn't have a *Department Pay Rate*, the *Base Hourly Rate* is used to calculate *Estimated Gross Wages*. (Pay rates for each staff member can be entered in the staff person's *Compensation* tab.)

Only the two reserved Pay Rates - Base Pay Rate and Department Rate - can be used to calculate Estimated Gross Wages.

Staff Here Now Report

This report displays all staff members that have a *Time In* but do not have a *Time Out* recorded for the current day. Incomplete time entries from previous days are not displayed.

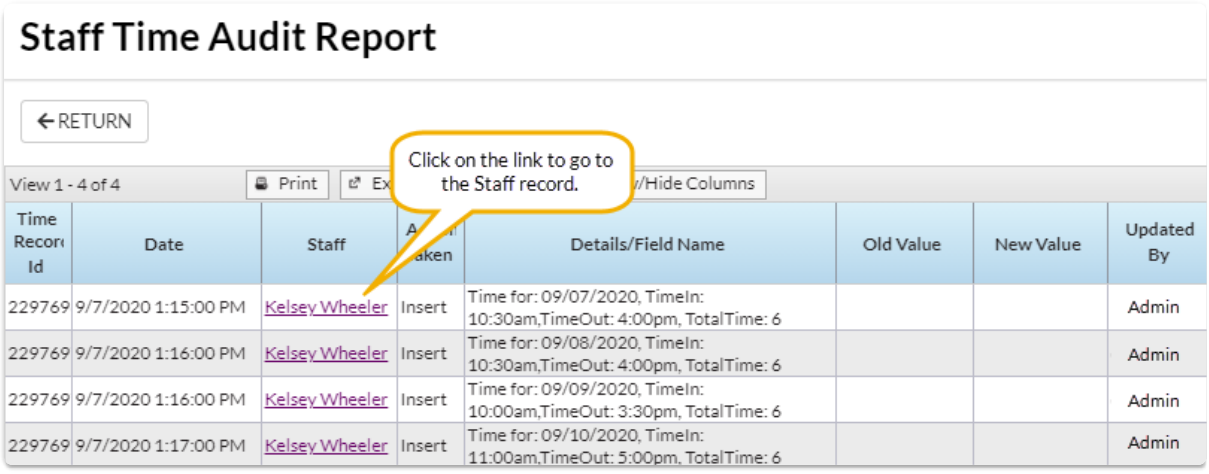
1. Go to the **Staff** (menu) > **Staff Reports** > **Staff Here Now Report.**
2. Select a **Location** and/or **Departments** if applicable.
3. Click **Submit**.

Any staff member that clocked in but never clocked out will be displayed in this report.

Staff Time Audit Report

The **Staff Time Audit** report offers a record of the activity in the time clock displaying the date & time, the staff member's name of the time record affected, the action (insert, update, delete), the field name, the old & new values, and the person involved.

1. Go to the **Staff** (menu) > **Staff Reports** > **Staff Time Audit Report**
2. Select **Search Criteria.** (You must choose a *Pay Period* to generate the report.)
3. Click **Submit.**



QUIZ - Lesson #6 - Manager Use of the Time Clock

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #6 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review questions.

Quiz #6 - Manager Use of the Time Clock

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
9	9	8	7	6

Return to Supervisors and Managers Menu to continue to next lesson

Click here to provide feedback for this lesson