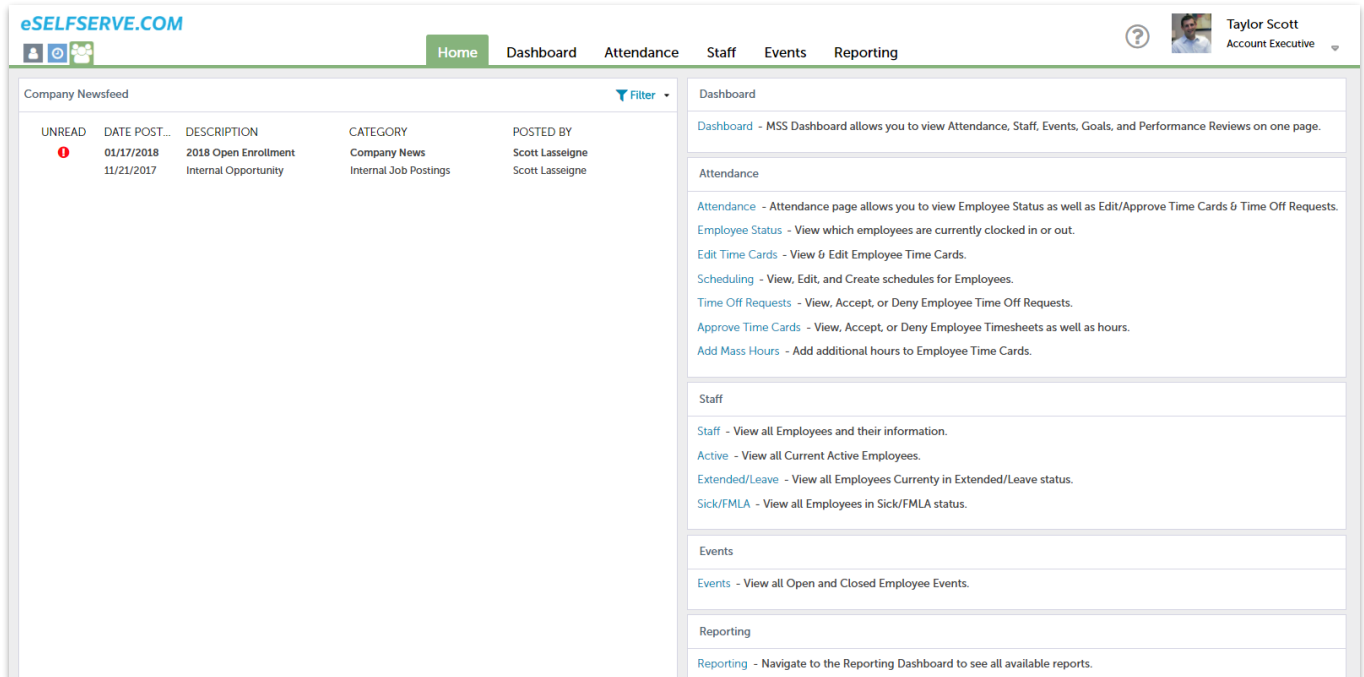


Your Home page will display the Company Newsfeed and links to and descriptions of your MSS options.



The screenshot shows the eSELFserve.COM dashboard. The top navigation bar includes links for Home, Dashboard, Attendance, Staff, Events, and Reporting. The user is logged in as Taylor Scott, Account Executive. The main content area is divided into two sections: Company Newsfeed and a sidebar with links to various MSS options.

Company Newsfeed

UNREAD	DATE POST...	DESCRIPTION	CATEGORY	POSTED BY
	01/17/2018	2018 Open Enrollment	Company News	Scott Lasseigne
	11/21/2017	Internal Opportunity	Internal Job Postings	Scott Lasseigne

Dashboard

Dashboard - MSS Dashboard allows you to view Attendance, Staff, Events, Goals, and Performance Reviews on one page.

Attendance

Attendance - Attendance page allows you to view Employee Status as well as Edit/Approve Time Cards & Time Off Requests.

Employee Status - View which employees are currently clocked in or out.

Edit Time Cards - View & Edit Employee Time Cards.

Scheduling - View, Edit, and Create schedules for Employees.

Time Off Requests - View, Accept, or Deny Employee Time Off Requests.

Approve Time Cards - View, Accept, or Deny Employee Timesheets as well as hours.

Add Mass Hours - Add additional hours to Employee Time Cards.

Staff

Staff - View all Employees and their information.

Active - View all Current Active Employees.

Extended/Leave - View all Employees Currently in Extended/Leave status.

Sick/FMLA - View all Employees in Sick/FMLA status.

Events

Events - View all Open and Closed Employee Events.

Reporting

Reporting - Navigate to the Reporting Dashboard to see all available reports.

Disclaimer: Please note that the visibility of alerts, consoles and pages is based on the features enabled for your company and security restrictions that may be in place. Therefore, not all functionality described in this document may be available to you.

Switching Modes – In the upper left-hand corner of all pages, there are several icons that are used to switch modes:



Employee Mode – This mode is used for viewing and updating your personal information, viewing past vouchers or check stubs and other documents, enrolling in benefits and requesting time off.

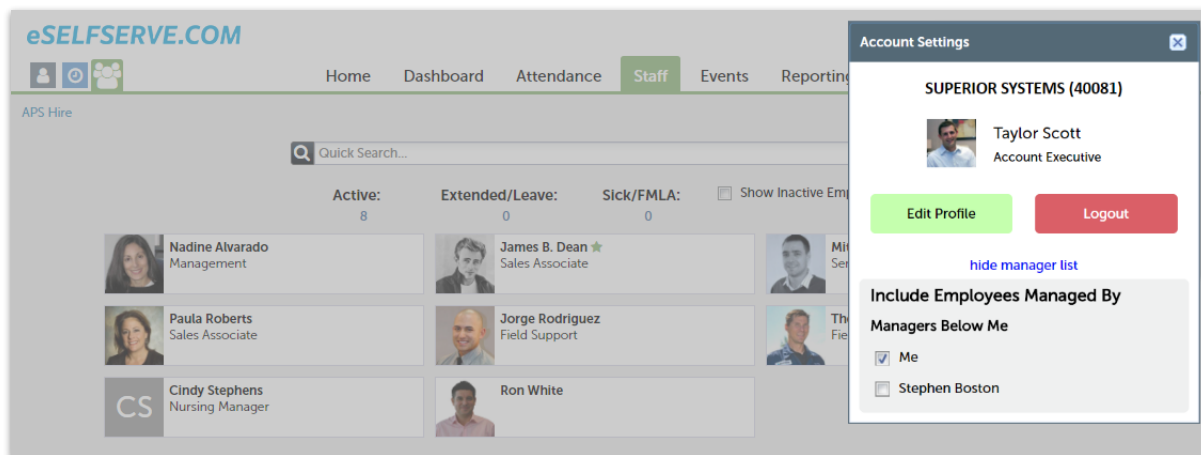


Time Clock Mode – This mode is used for reporting your time via a Time Clock or Timesheet.



Manager Mode – This is your default login mode as a manager. Its features are described below.

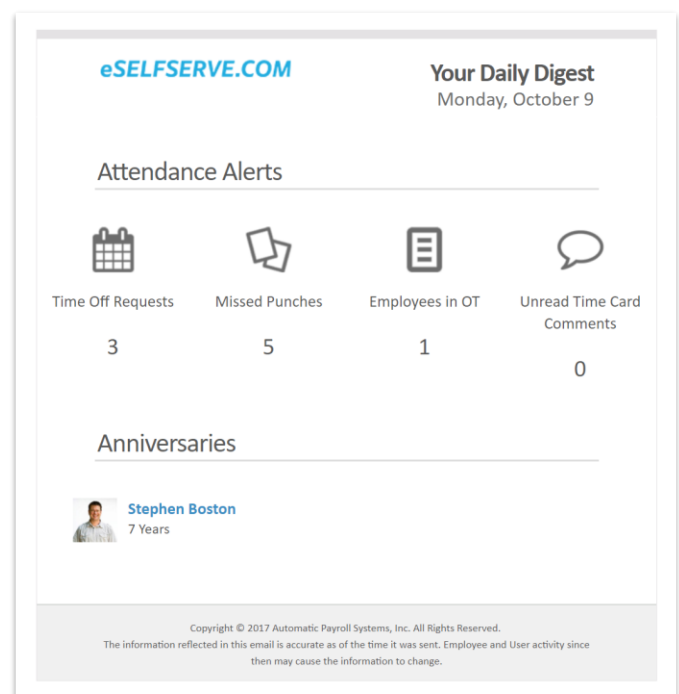
Account Settings – In the upper-right corner of all pages, your user profile will be displayed. Click on it to open the following menu:



This menu allows you to edit your profile and log out of the application. If you manage employees in more than one company, you are able to switch between companies from this menu. Additionally, you may use the hierarchy view to see employees managed by the employees you manage, if applicable.

Edit Profile Options – You are able to change your User ID and password and add a personal email address. You may also update your email preferences and subscribe to the Daily Digest.

Daily Digest – The Daily Digest is a daily email sent to your personal address on file that highlights Attendance and Event items for the day. It also keeps you informed of Staff dates (birthdays, anniversaries, sick leave, vacation, etc.) for the day.



Your Dashboard displays Attendance alerts, upcoming Staff dates, Event alerts, and outstanding Performance Reviews, Goals, and Employee Documents.

The screenshot shows the eSELFserve.COM MSS Dashboard. The top navigation bar includes Home, Dashboard (selected), Attendance, Staff, Events, and Reporting. The user Taylor Scott, Senior Manager, is logged in. The dashboard is divided into several sections:

- Attendance:** Includes alerts for "Time Cards need to be eSigned by employees", "Time Cards need to be approved and eSigned", "5 Missed Punches", "2 Unread Time Card Comments", "3 Time Off Requests", and "1 Shift is not within the allowed 90 minute variance".
- Events:** Includes "Certifications" (James Dean - 10-06-2017), "Disciplinary Action" (Denae Nickel - 10-02-2017, Rodney Orlando - 10-06-2017), and "Performance Reviews" (William Tanner - 10-06-2017).
- Performance Reviews:** Includes "Incomplete" reviews for Lucy Giles.
- Staff:** Includes "time off calendar" and "Anniversary" (Stephen Boston - 10-07-2017 - 7 years).
- Event:** Includes "Emma Kelley - 10-09-2017 - Returns from 'Surgery'".
- Time Off:** Includes "Rick Harrington" with PTO requests for 10-09-2017, 10-10-2017, 10-11-2017, 10-12-2017, and 10-13-2017.
- Goals:** Includes "Veronica Mann - 10-05-2017" with a goal requiring approval.
- Documents:** Includes "Brianna Lewis" (Direct Deposit Change Form) and "Ryan Mitchell" (Mileage Expense Form).

Dashboard Console

The *Attendance* section of the Dashboard contains several alerts:

- The **Time Cards need to be approved** link will appear after the pay period has ended
- Missed Punches
- Pending Time Off Requests
- Employees in Overtime

Clicking on each alert will take you where you can respond to the alert, whether it is to approve time cards, correct missed punches or manage time off requests.

The *Events* section of the Dashboard will alert you to upcoming employee events and event follow-ups (if applicable). Clicking on each alert will take you to the employee's event page.

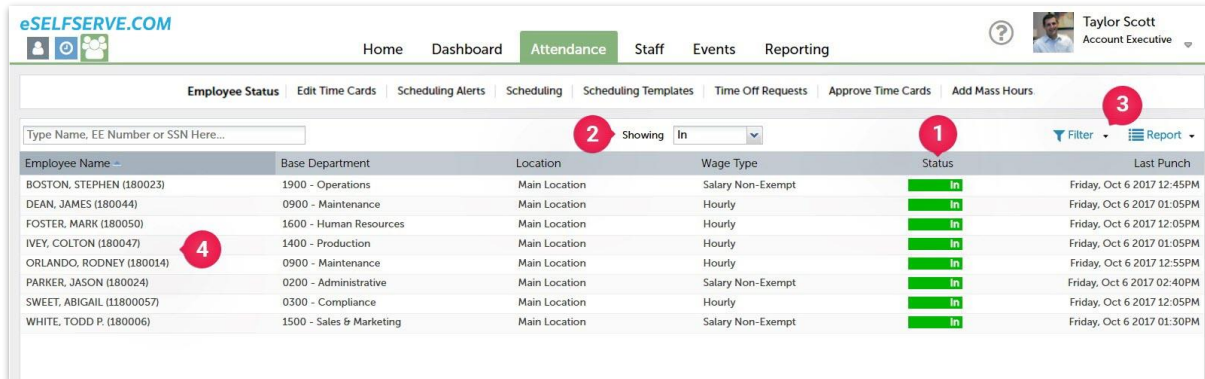
The *Staff* section of the Dashboard will notify you of upcoming dates related to your staff. Staff birthdays, work anniversaries and scheduled time off will appear here and be grouped by category.

Other sections may include outstanding Performance Reviews, Employee Goals, and Employee Documents.

The *Attendance* console allows you to manage your employees' time, respond to time off requests, approve time cards, and access employee reports.

Employee Status Page

1. Quickly see the clock status of your employees.
2. Choose to see which employees are **In**, **Out**, **On Break**, or **All** to see everyone.
3. Filter the list using the menu in the upper-right corner.
4. Double-clicking on an employee will take you to that employee's Time Card.

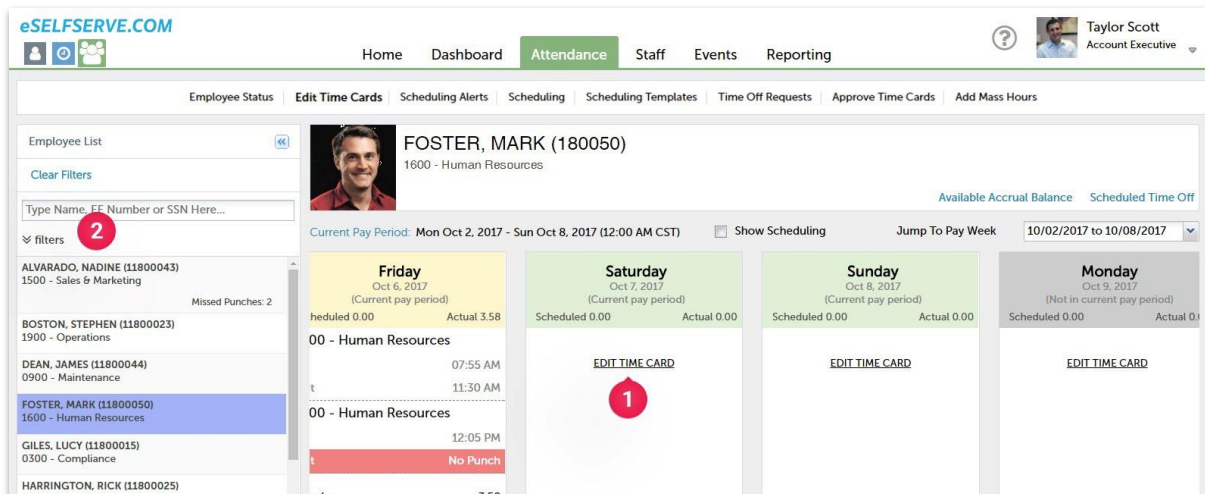


Employee Name	Base Department	Location	Wage Type	Status	Last Punch
BOSTON, STEPHEN (180023)	1900 - Operations	Main Location	Salary Non-Exempt	In	Friday, Oct 6 2017 12:45PM
DEAN, JAMES (180044)	0900 - Maintenance	Main Location	Hourly	In	Friday, Oct 6 2017 01:05PM
FOSTER, MARK (180050)	1600 - Human Resources	Main Location	Hourly	In	Friday, Oct 6 2017 12:05PM
IVEY, COLTON (180047)	1400 - Production	Main Location	Hourly	In	Friday, Oct 6 2017 01:05PM
ORLANDO, RODNEY (180014)	0900 - Maintenance	Main Location	Hourly	In	Friday, Oct 6 2017 12:55PM
PARKER, JASON (180024)	0200 - Administrative	Main Location	Salary Non-Exempt	In	Friday, Oct 6 2017 02:40PM
SWEET, ABIGAIL (11800057)	0300 - Compliance	Main Location	Hourly	In	Friday, Oct 6 2017 12:05PM
WHITE, TODD P. (180006)	1500 - Sales & Marketing	Main Location	Salary Non-Exempt	In	Friday, Oct 6 2017 01:30PM

Employee Status page under the Attendance tab

Edit Time Cards Page

1. Click **EDIT TIME CARD** to add/edit shift information or manage additional pay items.
2. Search by an employee's name or number. Use the *filters* to display only employees who have missed punches.



Employee Name	Base Department	Location	Wage Type	Status	Last Punch
BOSTON, STEPHEN (180023)	1900 - Operations	Main Location	Salary Non-Exempt	In	Friday, Oct 6 2017 12:45PM
DEAN, JAMES (180044)	0900 - Maintenance	Main Location	Hourly	In	Friday, Oct 6 2017 01:05PM
FOSTER, MARK (180050)	1600 - Human Resources	Main Location	Hourly	In	Friday, Oct 6 2017 12:05PM
IVEY, COLTON (180047)	1400 - Production	Main Location	Hourly	In	Friday, Oct 6 2017 01:05PM
ORLANDO, RODNEY (180014)	0900 - Maintenance	Main Location	Hourly	In	Friday, Oct 6 2017 12:55PM
PARKER, JASON (180024)	0200 - Administrative	Main Location	Salary Non-Exempt	In	Friday, Oct 6 2017 02:40PM
SWEET, ABIGAIL (11800057)	0300 - Compliance	Main Location	Hourly	In	Friday, Oct 6 2017 12:05PM
WHITE, TODD P. (180006)	1500 - Sales & Marketing	Main Location	Salary Non-Exempt	In	Friday, Oct 6 2017 01:30PM

Edit Time Cards page under the Attendance tab

Time Off Requests Page

1. Choose an employee to review pending Time Off Requests that have been submitted.
2. Switch between a *Monthly* and *Weekly* view of the calendar.
3. The employee's requested days, as well as available leave balances will be here.
4. You may include a response and approve or deny the request. To leave the request as pending, select **Record Response & Leave Pending**.

eSELF SERVE.COM

Home Dashboard **Attendance** Staff Events Reporting

Employee Status Edit Time Cards Scheduling Alerts Scheduling Scheduling Templates **Time Off Requests** Approve Time Cards Add Mass Hours

Time Off Request List

Type Name, EE Number or SSN Here...

ALVARADO, NADINE (180043)
0200 - Administrative
PTO 12 hour(s)

GILES, LUCY (180015)
0300 - Compliance
PTO 3 hour(s)

PARKER, JASON (180024)
0200 - Administrative
PTO 24 hour(s)

PARKER, JASON (180024)
0200 - Administrative
Request Type: PTO (Hours 120.00 Current - 0.00 Scheduled = 120.00 Available) [view all](#)
Submit Date: 10/06/2017
EE Comments: Going out of town

« October 2017 » Monthly View

Wed 18 8 Hours of PTO Thu 19 8 Hours of PTO Fri 20 8 Hours of PTO Sat 21 IVEY, COLTON 8 Hours of PTO Sun 22 Mon 23 Tue 24

Supervisor Response

Current Request Approved Pending Leave Tracking Cancellation Requested

Record Response & Leave Pending Approve Request Deny Request

Time Off Requests page under the Attendance tab

Approve Time Cards Page

1. To approve time cards, check the employees whose times are correct and mark them as approved by selecting **Approve Checked Times** at the bottom of the page. To make changes to a time card before approving it, double-click the employee to go to the time card.
2. To make changes (prior to payroll) to time cards that you have previously approved, select the *Approved Times* tab. Check which employee time cards you need to make changes to and select **Unapprove Checked Times** at the bottom of the page. You may now edit the time cards.
3. Double-clicking on an employee will take you to that employee's time card.

eSELF SERVE.COM

Home Dashboard **Attendance** Staff Events Reporting

Employee Status Edit Time Cards Scheduling Alerts Scheduling Scheduling Templates Time Off Requests **Approve Time Cards** Add Mass Hours

Timesheets (5 unsubmitted) Unapproved Times (5 records) Approved Times (3 records) Employees With No Time (4 records)

1 Name, EE Number or SSN Here... 2 Filter Report




Name	Department	Location	Wage Type	Regular	Overtime	Addl	Total	eSignature Status
BOSTON, STEPHEN (180023)	1900 - Operations	Main Location	Salary Non-Exempt	38.17	0.00	0.00	38.17	Not Signed
DEAN, JAMES (180044)	0900 - Maintenance	Main Location	Hourly	36.33	0.00	0.00	36.33	Not Signed
FOSTER, MARK (180050)	1600 - Human Resources	Main Location	Hourly	39.17	0.00	0.00	39.17	Not Signed
IVEY, COLTON (180047)	1400 - Production	Main Location	Hourly	38.00	0.00	0.00	38.00	Not Signed
ORLANDO, RODNEY (180014)	0900 - Maintenance	Main Location	Hourly	29.08	0.00	8.00	37.08	Not Signed
WHITE, TODD P. (180006)	1500 - Sales & Marketing	Main Location	Salary Non-Exempt	37.67	0.00	0.00	37.67	Not Signed
				218.42	0.00	8.00	226.42	

Approve Time Cards page under the Attendance tab

Add Mass Hours Page

1. To assign hours to more than one employee at a time, first fill out the shift information in **Step 1**.
2. Check the employees you want to add hours to and click **Review Entries** at the bottom. Upon review, you can change the number of hours per employee by clicking the hours. Once you have reviewed the information on the next page, choose **Save** at the bottom.

eSELFserve.COM



HomeDashboardAttendanceStaffEventsReporting

Employee StatusEdit Time CardsSchedulingEdit SchedulingScheduling AlertsTime Off RequestsApprove Time CardsAd

Step 1: Fill out shift information

Select Income Type

Holiday Pay (Hours)

Select Date

11/23/2017

Enter the number of hours, units or dollars to be applied
(You can override the amount on the next page)

8

Enter Comments To Appear On Time Card

Office closed for Thanksgiving Day

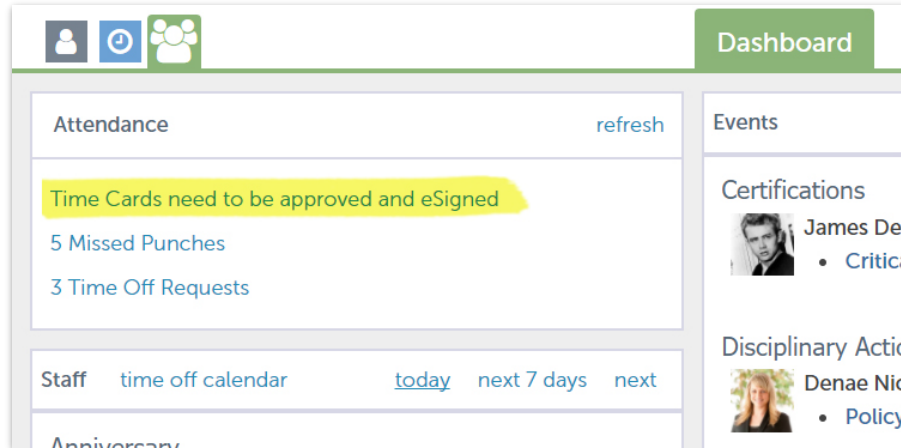
Step 2: Select the employees to receive time

2

Name	Base Department	Wage Type	Employee Type	Employment Type
<input checked="" type="checkbox"/> ALVARADO, NADINE (180043)	0200 - Administrative	Hourly	W2	Full Time
<input checked="" type="checkbox"/> BOSTON, STEPHEN (180023)	1900 - Operations	Salary Non-Exempt	W2	Full Time
<input checked="" type="checkbox"/> CAMPBELL, DYLAN (180012)	1200 - Customer Support	Salary Non-Exempt	W2	Full Time
<input type="checkbox"/> FOSTER, MARK (180050)	1600 - Human Resources	Hourly	W2	Part Time
<input checked="" type="checkbox"/> GILES, LUCY (180015)	0300 - Compliance	Hourly	W2	Full Time
<input checked="" type="checkbox"/> HARE, RICK (180025)	1100 - Accounting	Salary Exempt	W2	Full Time

Add Mass Hours page

At the end of the pay period you will be prompted to approve and electronically sign (eSign) your employees' time cards. You will see the alert on your dashboard in Manager Self-Service.



Dashboard in MSS

Click on the alert to go to the *Approve Time Cards* page.

Employee Status Edit Time Cards Add Mass Hours Time Off Requests Approve Time Cards Reports								
Timesheets (5 unsubmitted) Unapproved Times (6 records) Approved Times (2 records) Employees With No Time (4 records)								
Type Name, EE Number or SSN Here... Filter Rep								
<input type="checkbox"/> Name	Department	Location	Wage Type	Regular	Overtime	Addl	Total	eSignature Status
<input type="checkbox"/> BOSTON, STEPHEN (180023)	1900 - Operations	Main Location	Salary Non-Exempt	38.17	0.00	0.00	38.17	Not Signed
<input type="checkbox"/> DEAN, JAMES (180044)	0900 - Maintenance	Main Location	Hourly	36.33	0.00	0.00	36.33	Not Signed
<input type="checkbox"/> FOSTER, MARK (180050)	1600 - Human Resources	Main Location	Hourly	39.17	0.00	0.00	39.17	Not Signed
<input type="checkbox"/> IVEY, COLTON (180047)	1400 - Production	Main Location	Hourly	38.00	0.00	0.00	38.00	Not Signed
<input type="checkbox"/> ORLANDO, RODNEY (180014)	0900 - Maintenance	Main Location	Hourly	29.08	0.00	8.00	37.08	Not Signed
<input type="checkbox"/> WHITE, TODD P. (180006)	1500 - Sales & Marketing	Main Location	Salary Non-Exempt	37.67	0.00	0.00	37.67	Not Signed
				218.42	0.00	8.00	226.42	

Approve Time Cards Screen

Select the time cards you wish to approve and choose **Approve Checked Times**. You will be prompted to eSign your employees' time cards.

Enter the last four digits of your SSN and your eSELFserve.COM password into the respective boxes and choose **Sign**. Your employees will then be prompted to eSign their own time card.

Sign Time Cards

Timecard Summary

Regular	72.00
Other Time	8.00
Total	80.00

☒ By checking this box I am confirming that my employees' time cards are accurate.

Signature:

Taylor Scott

Date:

10/11/2017 3:50 pm

IP Address:

75.151.218.65

Enter Last 4 of SSN:

4040

Enter password:

.....

Sign

eSign Time Cards Screen in MSS

NOTE:

If you unapprove a time card, your eSignature and the employee's eSignature will be removed, and the process will repeat.

Once you approve and eSign your employees' time cards, you can send a reminder to employees to eSign their time cards from the *Approved Times* tab.

Employee Status Edit Time Cards Add Mass Hours Time Off Requests Approve Time Cards Reports									
Timesheets (5 unsubmitted) Unapproved Times (5 records) Approved Times (3 records) Employees With No Time (4 records)									
Type Name, EE Number or SSN Here... Filter Report									
<input checked="" type="checkbox"/>	Name	Department	Location	Wage Type	Regular	Overtime	Addl	Total	eSignature Status
<input checked="" type="checkbox"/>	BOSTON, STEPHEN (180023)	1900 - Operations	Main Location	Salary Non-Exempt	39.83	0.00	0.00	39.83	Not Signed
<input checked="" type="checkbox"/>	PARKER, JASON (180024)	0200 - Administrative	Main Location	Salary Non-Exempt	39.92	0.00	0.00	39.92	Not Signed
<input checked="" type="checkbox"/>	WHITE, TODD P. (180006)	1500 - Sales & Marketing	Main Location	Salary Non-Exempt	39.33	0.00	0.00	39.33	Not Signed
					119.08	0.00	0.00	119.08	
<div> <div> <div>Page 1 of 1</div> <div>Unapprove Checked Times</div> <div>Remind Selected Employees to eSign</div> </div> </div>									

Choose **Remind Selected Employees to eSign**. This will open the *Employee Notification Center*.

Employee Notification Center

An email will be sent to the following 2 employee(s):

BOSTON, STEPHEN(180023)

PARKER, JASON(180024)

Notification Template

eSignature Requested

Template Name

eSignature Requested

Template Description

Subject

eSignature Requested

☐ Schedule this notification for a later date/time.

Message Body

MuseoSans500
B
I
U
A
A
A
Add Data Element

Hello {employee first name},

Your manager has requested an eSignature for your current Time Card. Please log in to eSELFserve.com to sign.

Change Message Recipients

Send Notification

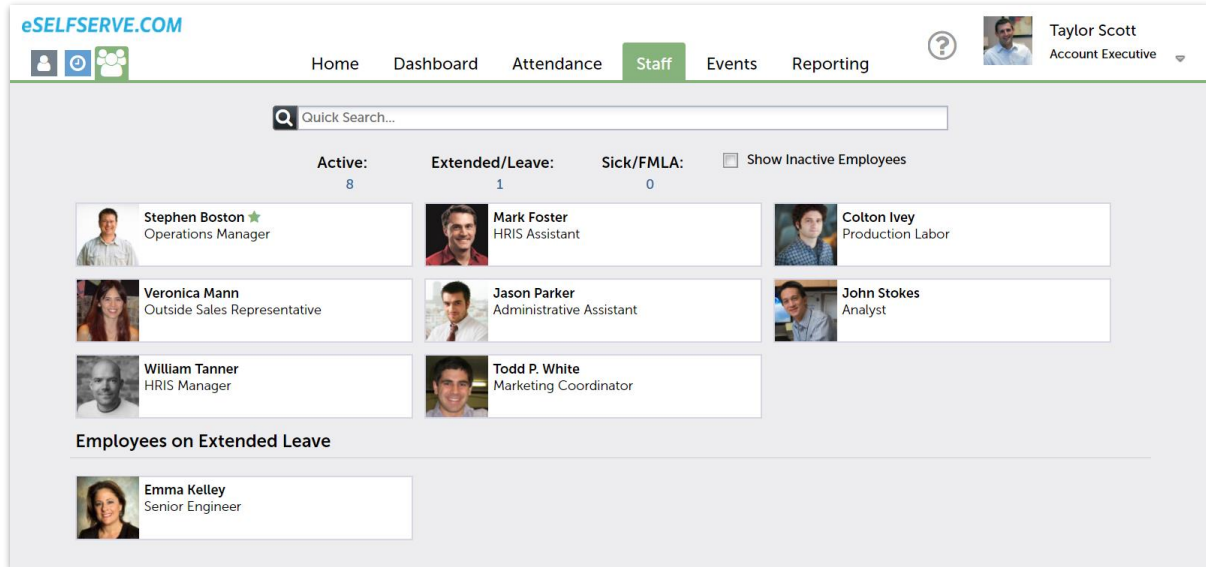
Employee Notification Center

Edit the message or send as is. You can also schedule the notification to go out at a later time. Only employees with email addresses can be sent messages.

NOTE:

You must correct all missed punches and manage all time off requests before you can approve and eSign employee time cards.

The *Staff* tab shows all employees in your group. A star indicates that person is also a manager of employees. To see the employees in that person's group, from your User Profile, check the box next to that person. Those employees will now be included in your view. Click an employee to access that employee's record.



Staff list as shown on the Staff tab

The following staff pages are available based on the services your company subscribes to and your security role:

The *Demographics* page allows you to view basic demographic information about an employee, including contact information, general work information (Base Department, Job Title, etc.) and emergency contact information.

The *Attendance* page provides the same functionality as the *Edit Time Card* page.

The *Pay* page provides information on YTD compensation, check stubs and vouchers, and tax forms.

The *Accruals* page provides information on an employee's current accrual balances.

The *Benefits* page provides information on an employee's current and pending enrollments in benefit plans.

The *Events* page allows you to view Events that have been created for the employee. You may also add and edit Events based on your company's settings.

The *Assets* page allows you to view and edit records for company assets that have been issued to the employee.

The *Rates & Deductions* page allows you to view information related to the employee's earnings and/or deductions.

The *Documents* page allows you to view and upload employee documents.

The *Reviews* page allows you to conduct and manage Performance Reviews for that employee.

The *Events* tab allows you to see events scheduled for your employees. You may also add events and/or edit current events based on your permissions. Events are ordered by category and are color-coded:

- **GREEN** means the Event is *Open* and due in the future.
- **RED** means the Event is *Open* and due or past due.
- No color means the Event is *Closed* and no further action is needed.

1. Click an Event to view its details. Open Events can be edited; Closed Events are locked. You may still view details, but you cannot edit the Event.
2. To add an Event, choose **+ add event**.

3. An Event Tracking window will pop up. Choose the *Employee*, *Event Category* and *Event Type* from the drop-down menus.
4. Select the date of the event, add a *Description* and *Notes*.
5. Mark the *Status* as **Open** if the event will be completed in the future or **Closed** if no further action is required. Include a *Follow-up Date* if necessary.
6. **Save** the event. It will now appear in your list and on that employee's record under *Events*.

NOTE:

You may also add an event for an employee through the *Events* tab of the employee's record.

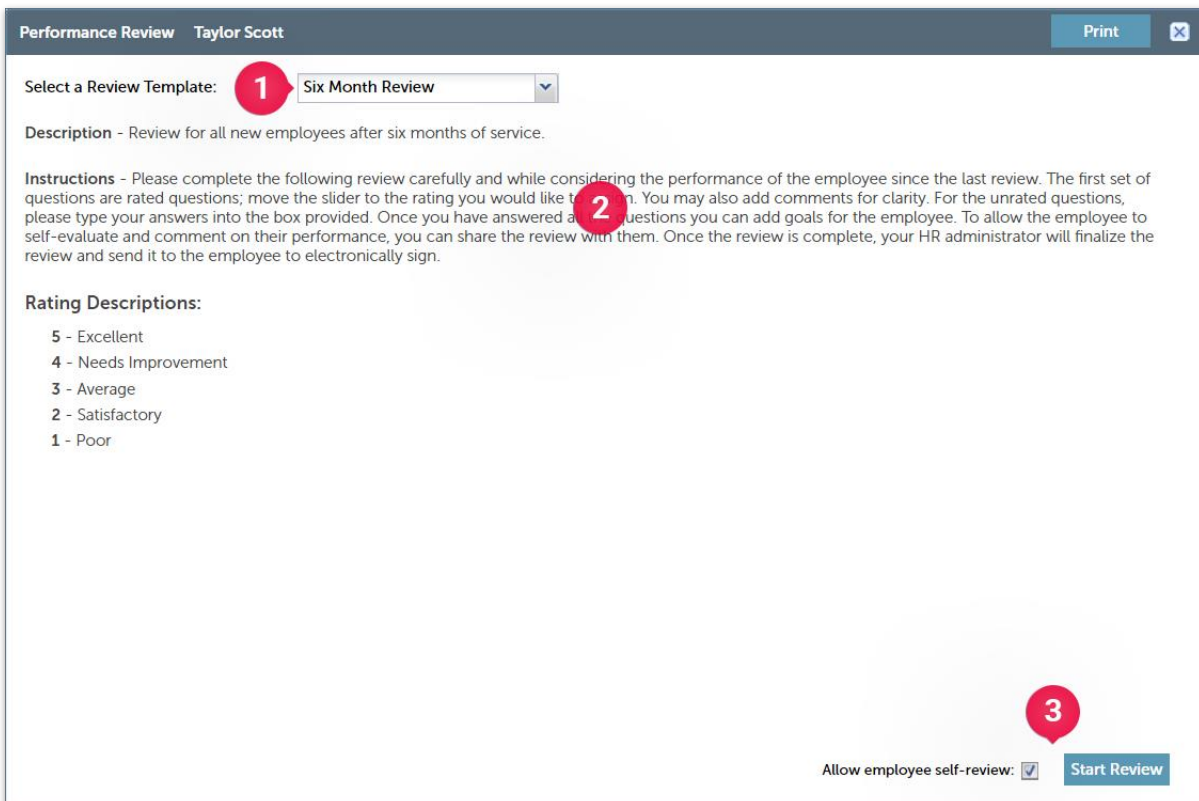
You can view and conduct goal-based *Performance Reviews* for your managed employees in Manager Self-Service. Notifications of scheduled reviews will appear on your dashboard under *Events*. Clicking the event will bring you directly to it in the employee's record. All reviews must be approved and committed by HR. This document will guide you through conducting a Performance Review.

CONDUCTING A PERFORMANCE REVIEW

To start a performance review, go to the *Reviews* section of the employee record. Click **+add review** beside *Reviews*.

1. Choose the template you will be using from the drop-down menu.
2. Instructions from HR will appear here.
3. Select **Allow employee self-review** if you would like the employee to self-review. Both you and the employee will be able to complete the review simultaneously. The employee will not see your comments. You may or may not see the employee's comments, depending on the settings set by HR.

Select **Start Review** to begin.



Performance Review Taylor Scott Print

Select a Review Template: **1** Six Month Review

Description - Review for all new employees after six months of service.

Instructions - Please complete the following review carefully and while considering the performance of the employee since the last review. The first set of questions are rated questions; move the slider to the rating you would like to assign. You may also add comments for clarity. For the unrated questions, please type your answers into the box provided. Once you have answered all questions you can add goals for the employee. To allow the employee to self-evaluate and comment on their performance, you can share the review with them. Once the review is complete, your HR administrator will finalize the review and send it to the employee to electronically sign. **2**

Rating Descriptions:

- 5 - Excellent
- 4 - Needs Improvement
- 3 - Average
- 2 - Satisfactory
- 1 - Poor

Allow employee self-review: ☒ **3** Start Review

Complete each section in order to proceed. For *Rated Questions*, move the slider to the number you would like to assign and add comments. Choose **Next** to proceed or **Continue Later** to save the review in order to complete it later.

Performance Review WHITE, TODD P. (180006) - Six Month Review Print

1 Rated Questions
2 Unrated Questions
3 Goals
4 Summary
5 Finalize

1. Attendance

Reviewer

Rating 5 *Excellent*

Comments (optional)
Perfect attendance so far and always punctual.

2. Job Knowledge

Reviewer

Rating 3 *Average*

Comments (optional)
Has strong problem-solving skills regarding the sales process. Still needs to work on certain areas.

3. Teamwork

Continue Later
Back
Next

For *Unrated Questions*, type your answer into the box.

Performance Review WHITE, TODD P. (180006) - Six Month Review Print

1 Rated Questions
2 Unrated Questions
3 Goals
4 Summary
5 Finalize

1. Job Performance

Reviewer

Answer (required)
Strong sales skills but needs to work on becoming more of a team player. Assigning goals for improvement.

Continue Later
Back
Next

To add *New Goals* (optional), click **+ add goal**. Fill in the information and click **Save**. The goals will now appear on the review. They will read *Unapproved* until the review is approved and committed by HR. You can change the *Percent Complete* once the goal has been submitted by going to the *Goals* section of the employee's *Reviews* tab.

Event Tracking - Goal

Employee:

WHITE, TODD P. (180006)

Event Date:

10/09/2017

Description:

Teamwork/Co-worker Communication

Notes:

Assigned goals to improve co-worker relations.

204 of 250 characters remaining

Percent Completed:

0

Status:

Open

Follow-up Date:

12/04/2017

Save

To complete the review, review the information in the *Summary* tab and choose **Next** to go to the *Finalize* tab. Choose **Submit** to send the review to HR for approval.

Performance Review

WHITE, TODD P. (180006) - Six Month Review

Print

1 Rated Questions

2 Unrated Questions

3 Goals

4 Summary

5 Finalize

Send to HR for approval

Delete

Submit

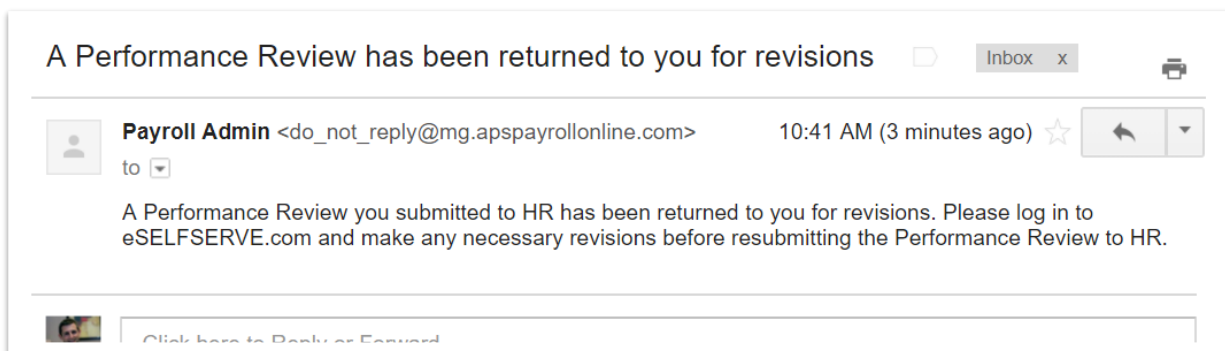
Continue Later

Back

Next

The review will now appear under *Reviews* on the employee record. The status will read *Pending HR Approval* or *Employee to Comment* until it is approved and committed by HR or the self-review is completed by the employee.

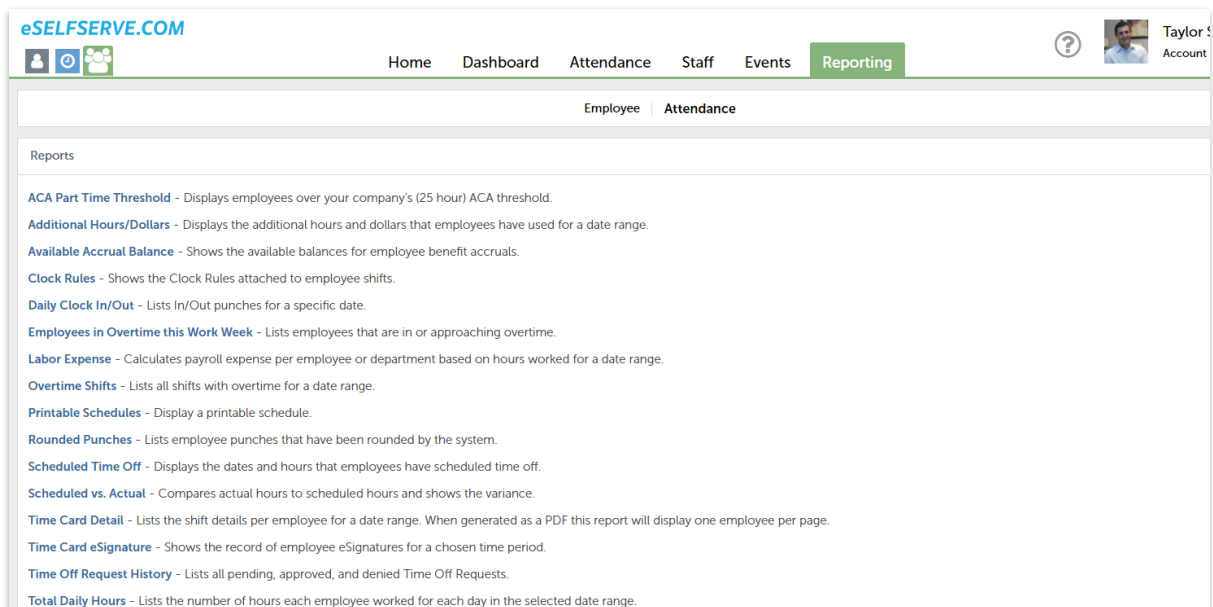
After reviewing the submitted performance review, HR may return it to you for changes. If so, you will receive an email notification.



After you make the requested changes, you must resubmit the review. Once HR approves the review, it will be sent to the employee to electronically sign, and the status will read *Awaiting Employee Signature*.

When the employee has viewed and signed the review, the status will read *Complete* and the date completed will appear. No further action is necessary.

Use the *Reporting* tab to access Employee and Attendance reports.



Reporting tab

- Run several reports related to Attendance, such as *Employees in Overtime this Work Week* and *Time Card Detail*.
- Choose the report, fill in desired information, and **Run Report**.
- You may download as a PDF or print directly from the console.

Creating Scheduling Templates

NOTE: You will create a template to use for employee schedules. Templates do not include specific dates. They do include shifts and employee assignments.

Go to **Attendance > Scheduling Templates** and click **Create Template**. Fill in the template *Name*, *Template Length*, and *Starting Day*.

eSELFserve.COM

Home Dashboard **Attendance** Staff Events Reporting

Employee Status Edit Time Cards Scheduling Alerts Scheduling Scheduling Templates Time Off Requests Approve Time Cards

Template Details

Name Template Length Starting Day 0.00 assigned

[Copy Template](#) [Delete Template](#)

MONDAY	TUESDAY	WEDNESDAY	THURSDAY
ADD SHIFT	ADD SHIFT	ADD SHIFT	ADD SHIFT

Add shifts for each day to fill in the template. You will select the *Department*, *Start* and *End* times, *Break* time, and number of *People Needed* for each shift. **SAVE** when complete.

Template Details

Name Template Length Starting Day 0.00 assigned

[Copy Template](#) [Delete Template](#)

MONDAY	TUESDAY	WEDNESDAY	THURSDAY
ADD SHIFT	ADD SHIFT	ADD SHIFT	ADD SHIFT

0500 - Interns

08:00 AM - 12:00 PM 4.00 hours
-15 minute break
3.75 hours

2 people needed 7.50 total hours

[ADD EMPLOYEE\(S\)](#)

[EDIT](#) [COPY SHIFT](#) [DELETE](#)

Click **ADD EMPLOYEE(S)** to assign employees to the shift.

Template Details

NameInterns

Template Length1 Week

Starting DayMonday

0.00 assign

Copy Template

Delete Template

MONDAY

ADD SHIFT

TUESDAY

ADD SHIFT

WEDNESDAY

ADD SHIFT

THURSDAY

ADD SHIFT

0500 - Interns

08:00 AM - 12:00 PM4.00 hours
-15 minute break
3.75hours

2 people needed7.50 total hours

ADD EMPLOYEE(S)

EDIT

COPY SHIFT

DELETE

Eligible employees will be listed in the popup window. The *Total Labor Cost* for the shift is based on the employee's rate.

Check off the employee(s) you wish to assign to the shift and click **Apply Shift to Selected Employee(s)**.

MONDAY

0500 - Interns

08:00 AM - 12:00 PM (15 minute break)

3.75 hours

Type Name, EE Number or SSN Here...

Name

Total Labor Cost

Conflicts

☒

DUDLEY, AMY (11800011)

37.5

☐

JONES, PHILLIP (11800004)

37.5

☒

SWEET, ABIGAIL (11800057)

37.5

0 shift(s) remaining

Apply Shift to Selected Employee(s)

To copy shifts from day to day, click **COPY SHIFT**. Employee assignments will carry over when copying shifts.

Employee Status | Edit Time Cards | Scheduling Alerts | Scheduling | Scheduling Templates | Time Off Requests | Approv

Template Details

NameInterns

Template Length1 Week

Starting DayMonday

0.00 assign

Copy Template

Delete Template

MONDAY

ADD SHIFT

TUESDAY

ADD SHIFT

WEDNESDAY

ADD SHIFT

THUR

ADD S

0500 - Interns

08:00 AM - 12:00 PM4.00 hours
-15 minute break
3.75hours

2 people scheduled for 7.50 hours hide

DUDLEY, AMY (11800011)

SWEET, ABIGAIL (11800057)

EDIT

COPY SHIFT

DELETE

Click **PASTE SHIFT** on the days you wish to copy the shift to and click **I'M DONE COPYING** at the top when finished.

Template Details

Name

Interns

Template Length

1 Week

Starting Day

Monday

22.50 assigned hours

Copy Template

Delete Template

Use the "PASTE SHIFT" link at the top of each column to copy the selected shift to another day.

I'M DONE COPYING

MONDAY	TUESDAY	WEDNESDAY	THURSDAY
<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>hide</div> <div>DUDLEY, AMY (11800011)</div> <div>SWEET, ABIGAIL (11800057)</div>	<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>show</div>	<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>show</div>	<div>PASTE SHIFT</div>

Use the *EDIT* and *DELETE* links to make changes to or delete shifts.

NOTE:

Be sure to fill out the template completely. If you create a two-week template and only fill out the first week, the second week of every schedule created with this template will be blank.

You can always come back and make changes to templates as needed for new schedules.

Creating Employee Schedules

Go to **Attendance > Scheduling** and click **Create Schedule**. Choose the template you would like to use to create the schedule and then choose the date range to be covered.

Interns

Budgeted Hours

37.50

Open Shifts

0

Assigned Shifts

10

10 shifts assigned (100.00%)

Monday, March 19th	Tuesday, March 20th	Wednesday, March 21st	Thursday, March 22nd	Friday, March 23rd
<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>hide</div> <div>DUDLEY, AMY (11800011)</div> <div>SWEET, ABIGAIL (11800057)</div>	<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>show</div>	<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>show</div>	<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>show</div>	<div>0500 - Interns</div> <div>08:00 AM - 12:00 PM</div> <div>4.00 hours</div> <div>-15 minute break</div> <div>3.75hours</div> <div>2 people scheduled for 7.50 hours</div> <div>show</div>

Email Schedules to Employees

Delete Schedule

Since you assigned employees on the template, employees will be assigned on the schedule. You can update an employee's scheduled time if they are already on the schedule by clicking **edit day** on the shift you need to adjust.

Interns

Budgeted Hours: 37.50

Open Shifts: 0

Assigned Shifts: 10 shifts assigned (100.00%)

Monday, March 19th

0500 - Interns
08:00 AM - 12:00 PM 4.00 hours
-15 minute break
3.75hours

2 people scheduled for 7.50 hours [hide](#)

DUDLEY, AMY (11800011) [edit day](#) [remove](#)

SWEET, ABIGAIL (11800057) [edit day](#) [remove](#)

Edit Schedule - Monday Mar 19, 2018

[+ Add Schedule](#)

Scheduled Time: 03/19/2018 08 AM :00 - 03/19/2018 12 PM :00 Break Minutes: 15

Department: 0500 - Interns

[delete](#)

Total time scheduled for this shift: 3.75 hours

[Save](#)

NOTE: Changes made on the schedule will not flow back to the template.

Click the **Email Schedules to Employees** button to send each employee an email of their personal schedule.

Interns

Budgeted Hours: 37.50

Open Shifts: 0

Assigned: 10

Monday, March 19th	Tuesday, March 20th	Wednesday, March 21st	Th
<p>0500 - Interns 08:00 AM - 12:00 PM 4.00 hours -15 minute break 3.75hours</p> <p>2 people scheduled for 7.50 hours hide</p> <p>DUDLEY, AMY (11800011) edit day remove</p> <p>SWEET, ABIGAIL (11800057) edit day remove</p>	<p>0500 - Interns 08:00 AM - 12:00 PM 4.00 hours -15 minute break 3.75hours</p> <p>2 people scheduled for 7.50 hours show</p>	<p>0500 - Interns 08:00 AM - 12:00 PM 4.00 hours -15 minute break 3.75hours</p> <p>2 people scheduled for 7.50 hours show</p>	<p>0500 - I 08:00 AM</p> <p>2 people</p>

[Email Schedules to Employees](#) [Delete Schedule](#)

Employees can also log in to eSELFserve.COM to see their personal schedules.

Viewing and Editing Employee Schedules

By default, only partially allocated schedules show on your *Scheduling* page. To view created schedules, check the *Include fully allocated schedules* box.

Schedule	Date Range	Budgeted Hours	Open Shifts	Assigned Shifts	Progress
Interns	03/19/2018 - 03/25/2018	40.00	0	10	100%

Double-click a schedule to view and make changes.

If you need to add an additional shift to a schedule that has already been created, add the schedule to the employee from their time card:

Go to **Attendance > Edit Time Cards** and select the desired employee from the list on the left. Check *Show Scheduling* and click **EDIT SCHEDULE**.

Employee List: SWEET, ABIGAIL (11800057) 0500 - Interns

Current Pay Period: Sun Oct 1, 2017 - Sun Oct 29, 2017 (12:00 AM CST) ☒ Show Scheduling

Jump To Pay Week: 03/05/2018 to 03/11/2018

Monday Mar 5, 2018 (Not in current pay period)	Tuesday Mar 6, 2018 (Not in current pay period)	Wednesday Mar 7, 2018 (Not in current pay period)	Thursday Mar 8, 2018 (Not in current pay period)
Scheduled 0.00 Actual 0.00	Scheduled 0.00 Actual 0.00	Scheduled 0.00 Actual 0.00	Scheduled 0.00 Actual 0.00
EDIT TIME CARD	EDIT TIME CARD	EDIT TIME CARD	EDIT TIME CARD

NOTE: Added shifts will not flow back to the schedule but will show on the scheduling reports.

Existing scheduled time for employees will show on the time card if the *Show Scheduling* box is checked.

NOTE: Edits made to employee schedules from the time card will only flow back to the schedule if the employee/shift was first on the schedule.

The BEST PRACTICE for editing existing schedules will be to

1. Add what is needed via the employee time cards
2. Adjust the scheduling template if the changes need to be reflected moving forward
3. Use the updated template to create future schedules

Scheduling Alerts

Attendance > Scheduling Alerts will show you the following alerts:

- **Absent** – Employees who are scheduled but have not clocked in.
- **Late** – Employees who have clocked in after the specified number of minutes set by your administrator
- **Conflicts** – Shows any upcoming overlapping shifts on recurring schedules.
- **Variances** – Employees whose actual shift time varies from their schedule by the number of minutes specified by your administrator.
- **Exceptions** – Employees who have clocked in to a department other than the one they are scheduled.

Scheduling Reports

Go to **Reporting > Attendance**.

The *Printable Schedules* report will show scheduled shifts for an entered date range. The information reflects what is on employee time cards.

Company Name	SUPERIOR SYSTEMS			
User Name	Taylor Scott			
Report Run Date	03/06/2018			
Date Range	03/06/2018 to 03/31/2018			
Department	0500 - Interns			
Group By	Department			

0500 - Interns

Tuesday, March 6th to Saturday, March 31st

Monday, March 19th

DUDLEY, AMY	Main Location	08:00 AM - 12:00 PM	15 min. break	3.75
SWEET, ABIGAIL		08:00 AM - 12:00 PM	15 min. break	3.75
			Day Hours:	7.50

Tuesday, March 20th

SWEET, ABIGAIL	Main Location	08:00 AM - 12:00 PM	15 min. break	3.75
DUDLEY, AMY		08:00 AM - 12:00 PM	15 min. break	3.75
			Day Hours:	7.50

Wednesday, March 21st

DUDLEY, AMY	Main Location	08:00 AM - 12:00 PM	15 min. break	3.75
SWEET, ABIGAIL		08:00 AM - 12:00 PM	15 min. break	3.75

(Report shown grouped by Department)

The *Scheduled vs. Actual* report will list employee shifts that vary from their scheduled shifts. You have the option to show only certain variances and highlight certain variances.

Company Name	SUPERIOR SYSTEMS								
User Name	Taylor Scott								
Report Run Date	03/06/2018								
Date	03/06/2018 to 03/31/2018								
Only show variances greater than or equal to (Default 15 minutes)	15								
Highlight variances greater than (Default 5 minutes)	5								
Include Comments	No								
Date	Employee	Department	Location	Scheduled		Actual	Scheduled Total	Actual Total	Total Variance
03/19/2018	DUDLEY, AMY	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4,000 hours	No shifts	3.750	0.000	3.750
03/19/2018	SWEET, ABIGAIL	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4,000 hours	No shifts	3.750	0.000	3.750
03/20/2018	DUDLEY, AMY	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4,000 hours	No shifts	3.750	0.000	3.750
03/20/2018	SWEET, ABIGAIL	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4,000 hours	No shifts	3.750	0.000	3.750
03/21/2018	DUDLEY, AMY	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4,000 hours	No shifts	3.750	0.000	3.750
03/21/2018	SWEET, ABIGAIL	0500 - Interns	Main Location	08:00AM - 12:00PM 15 min. break	4,000 hours	No shifts	3.750	0.000	3.750

For questions about scheduling, contact your administrator.

ADDING AND EDITING SCHEDULES FOR EMPLOYEES

1. To schedule shifts for employees, go to the *Attendance* tab.
2. Click **Edit Time Cards**.
3. Check **Show Scheduling**.

The screenshot shows the eSELFserve.COM interface. At the top, the 'Attendance' tab is selected (highlighted with a red circle 1). Below the navigation bar, the 'Edit Time Cards' button is visible (highlighted with a red circle 2). In the main content area, the 'Show Scheduling' checkbox is checked (highlighted with a red circle 3). The interface displays a list of employees on the left and a detailed view for 'MARTINEZ, JON (00004)' on the right, showing scheduled shifts and time cards for the current pay period.

To add a new schedule or edit an existing schedule, click **EDIT SCHEDULE** on the day you need to edit.

The 'Edit Schedule' form for Thursday, Jan 25, 2018, is shown. It includes the following fields and options:

- Scheduled Time:** 01/25/2018, 08 AM - 05 PM, Break Minutes: 60
- Department:** 400 - Technical Support
- Options:** ☐ Test, ☐ On Call, ☐ Mileage
- Total time scheduled for this shift:** 8.00 hours
- Buttons:** + Add Schedule, delete, Save

Click **Add Schedule** to add start and end times, break minutes, and assign a department. Choose **Save** when complete.

SCHEDULING ALERTS

Attendance > Scheduling Alerts will show different alerts:

- Absent – Employees who are scheduled but have not clocked in.

- Late – Employees who have clocked in after the start of their schedule.
- Conflicts – Shows any upcoming overlapping shifts on recurring schedules. It will show conflicts for shifts that have not yet started. Previous conflicts will appear on employee time cards.
- Variances – Employees whose actual shift time varies from their schedule.
- Exceptions – Employees who have clocked in to a department other than the one they are scheduled.

eSELF SERVE.COM

Home Dashboard **Attendance** Staff Events Reporting

Employee Status Edit Time Cards Scheduling **Scheduling Alerts** Time Off Requests Approve Time Cards Add Mass Hours

Absent - 1 Late - 1 Conflicts - 0 Variances - 2 Exceptions - 0

Search Employees View: Absent Period: Last 12 Hours Filter

Employee	Scheduled Department	Actual Department	Scheduled Clock In	Actual Clock In	Scheduled Clock Out	Actual Clock Out	Scheduled Total Hours
PEMBERLY, JAMES (00008)	400 - Technical Support		01/26/2018 10:00 AM		01/26/2018 07:00 PM		9

SCHEDULING REPORTS

Reporting > Attendance will show all attendance reports you can run. The *Printable Schedules* and *Scheduled vs. Actual* reports will pull data from the schedules on employee time cards.