



# Manage Timekeeping

2017- Summer Edition

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## Overview

The **Manage Timekeeping Module** allows users, with the proper permissions, to edit an Employee's existing Timesheet, create a new Timesheet, and delete a Timesheet. Timekeeping can be managed in both the **POS** and the **Back Office System**. In this guide, we will review each option.

## Use Case(s)

- An F&B Manager needs to edit the clock in time of a Server who forgot to clock in.
- A Pro Shop Employee clocked out under the wrong Job Code, and the Pro Shop Manager needs to update the Job Code on their Timesheet.
- An F&B Manager needs to delete an existing Timesheet, and create a new Timesheet for one their Servers.

## Manage Timekeeping in the POS

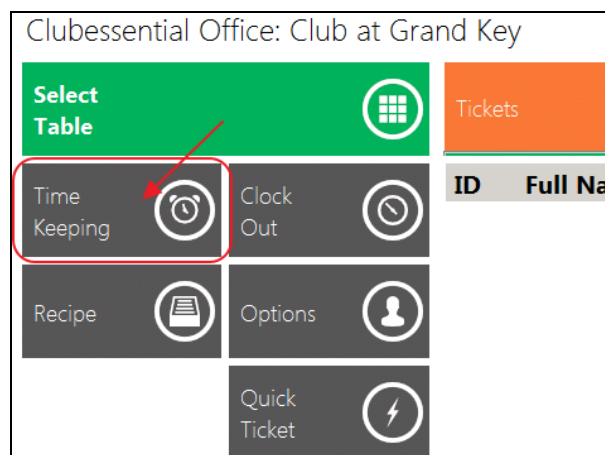
In this section, we will review the proper procedures to follow when Managing Timekeeping in the **POS**.

**Please Note:** Only users with the proper permissions will have these options available at the POS.

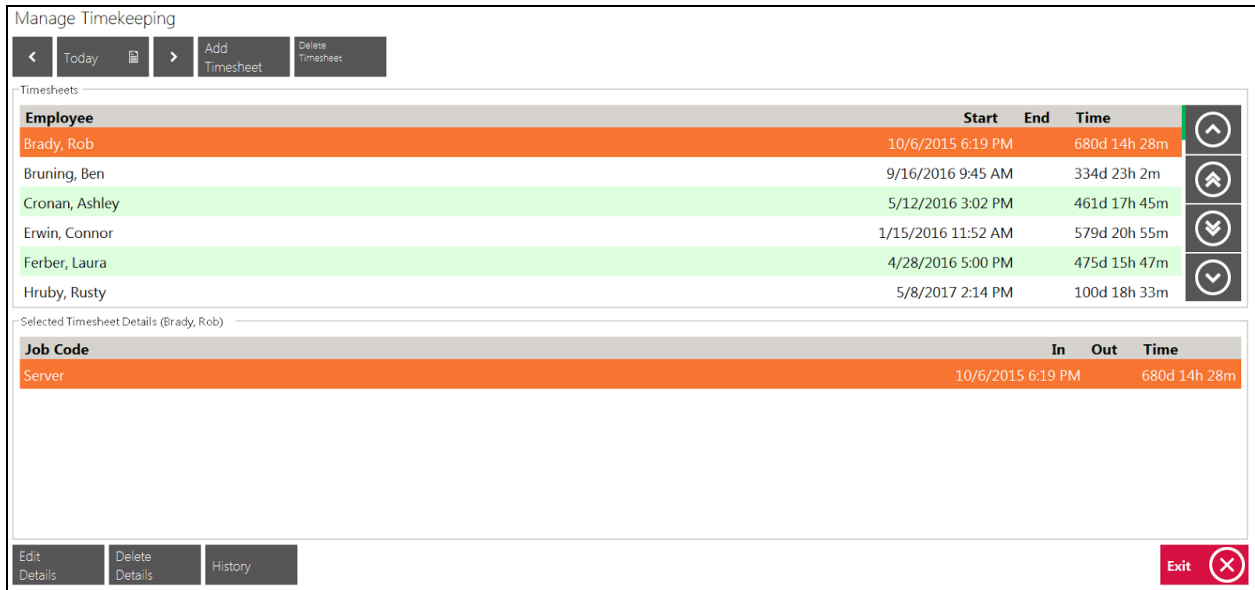
## Accessing the Tool

To access the **Timekeeping** tool in the POS:

- 1) Log in to the POS as normal and select **Timekeeping**.



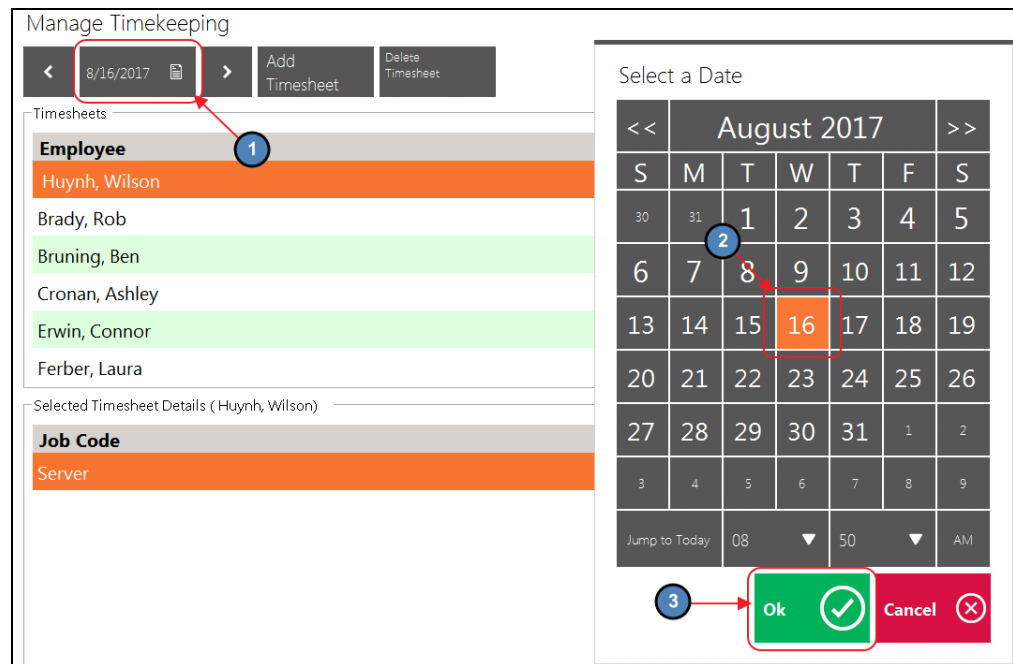
2) The **Manage Timekeeping** Module will launch.



## Editing an Existing Timesheet

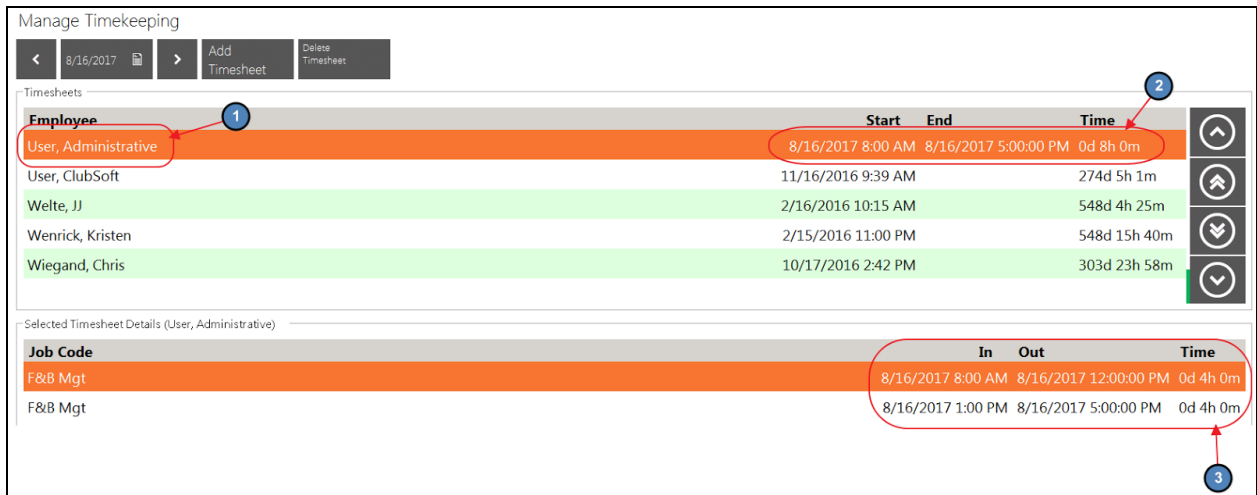
To edit an existing Timesheet:

- 1) Use the **Date** field to select the applicable Date in which the Timesheet occurred.



2) Select the applicable **Employee** from the Grid.

**Please Note:** The **top** section of the Grid displays **Shift** totals (In Hours Worked) for the Employee, while the **bottom** section displays the Employee's **Timesheets** that make up the total of the Shift (For example, the Employee could have two Timesheets for one Shift if the Employee clocked out for Lunch).



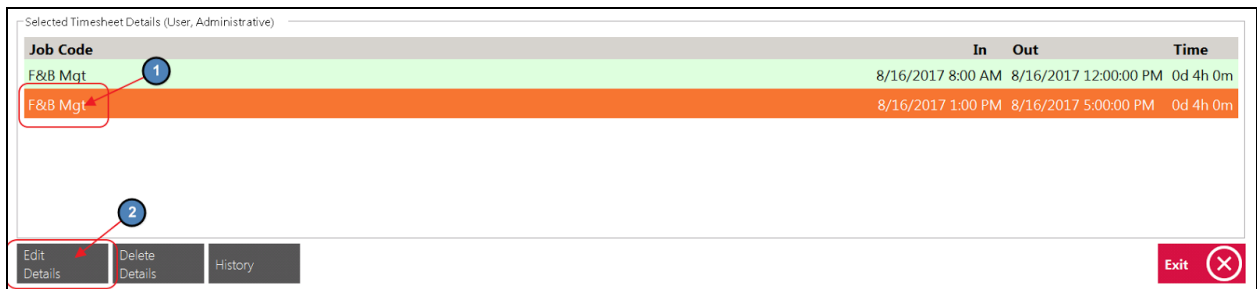
The screenshot shows the 'Manage Timekeeping' interface. At the top, there are navigation buttons for dates and actions like 'Add Timesheet' and 'Delete Timesheet'. Below this is a 'Timesheets' section with a table of employees. The first row, 'User, Administrative', is highlighted in orange and circled with a red box and a blue '1'. To its right, the start and end times and total time are also circled with a red box and a blue '2'. Below the employee grid is a 'Selected Timesheet Details (User, Administrative)' section. It contains a table with two rows for 'F&B Mgt', both highlighted in orange. The first row is circled with a red box and a blue '3'. At the bottom right, there are navigation arrows.

Employee	Start	End	Time
User, Administrative	8/16/2017 8:00 AM	8/16/2017 5:00:00 PM	0d 8h 0m
User, ClubSoft	11/16/2016 9:39 AM		274d 5h 1m
Welte, JJ	2/16/2016 10:15 AM		548d 4h 25m
Wenrick, Kristen	2/15/2016 11:00 PM		548d 15h 40m
Wiegand, Chris	10/17/2016 2:42 PM		303d 23h 58m

Job Code	In	Out	Time
F&B Mgt	8/16/2017 8:00 AM	8/16/2017 12:00:00 PM	0d 4h 0m
F&B Mgt	8/16/2017 1:00 PM	8/16/2017 5:00:00 PM	0d 4h 0m

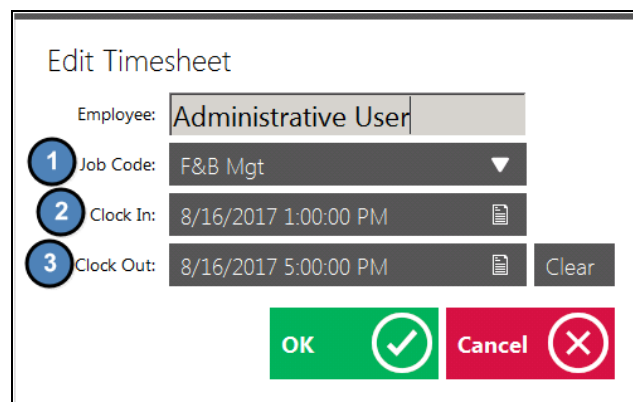
3) Be sure to select the correct Timesheet from the bottom grid labeled **Job Code** (If there is more than one), and select **Edit Details**.



This screenshot shows the 'Selected Timesheet Details (User, Administrative)' view. It features a grid of 'Job Code' entries. The second row, 'F&B Mgt', is highlighted in orange and circled with a red box and a blue '1'. Below the grid, there are three buttons: 'Edit Details' (circled with a red box and a blue '2'), 'Delete Details', and 'History'. An 'Exit' button with a red 'X' icon is located at the bottom right.

Job Code	In	Out	Time
F&B Mgt	8/16/2017 8:00 AM	8/16/2017 12:00:00 PM	0d 4h 0m
F&B Mgt	8/16/2017 1:00 PM	8/16/2017 5:00:00 PM	0d 4h 0m

4) Please review available options below:

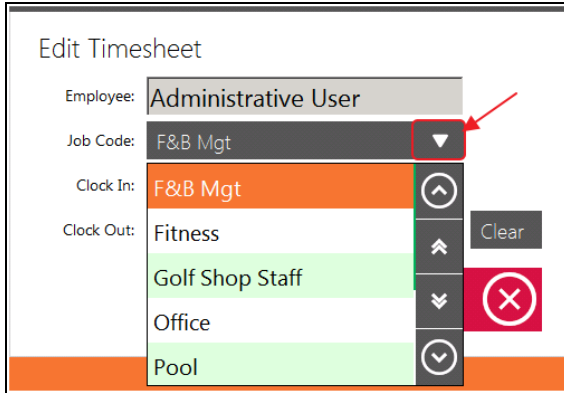


The 'Edit Timesheet' dialog box contains the following fields and buttons:

- Employee: Administrative User
- 1 Job Code: F&B Mgt
- 2 Clock In: 8/16/2017 1:00:00 PM
- 3 Clock Out: 8/16/2017 5:00:00 PM
- Buttons: OK, Cancel, Clear, Exit (X)

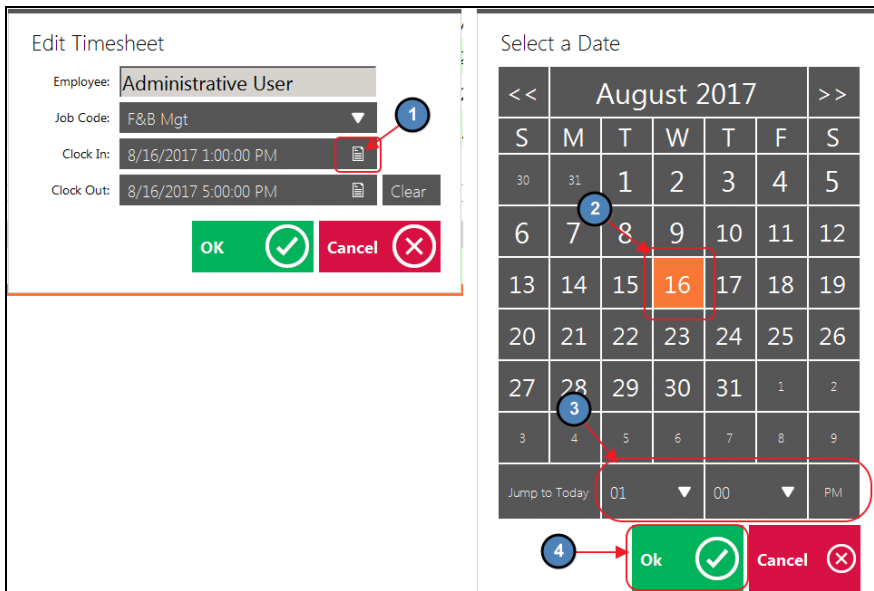
### Job Code

The Job Code assigned to a particular Timesheet can be edited by selecting the drop-down arrow. The Lookup Value will display all Job Codes assigned to the Employee.



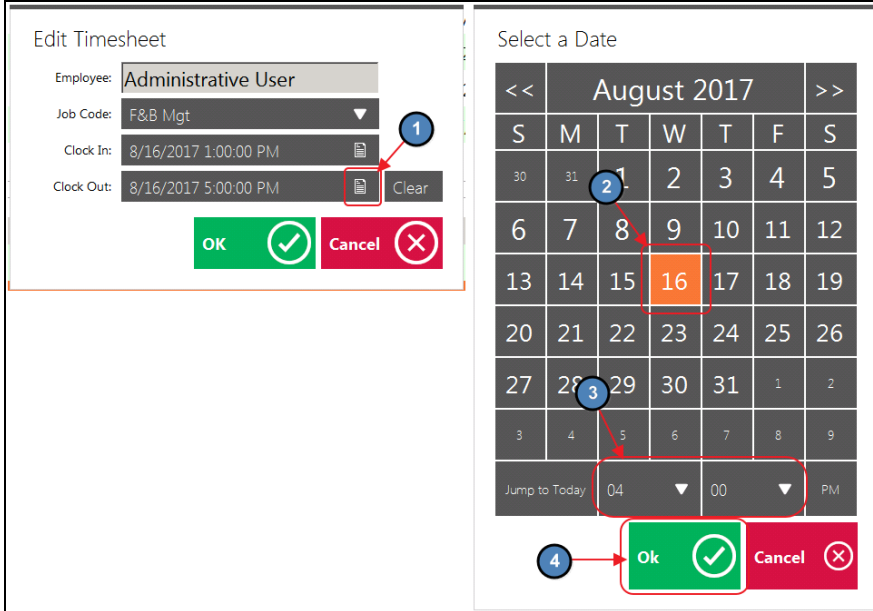
### Clock In

The **Clock In Date/Time** of a particular Timesheet can be edited here. Select the Lookup Value for a more user friendly interface.



## Clock Out

The **Clock Out Date/ Time** of a particular Timesheet can be edited here. Select the Lookup Value for a more user friendly interface.



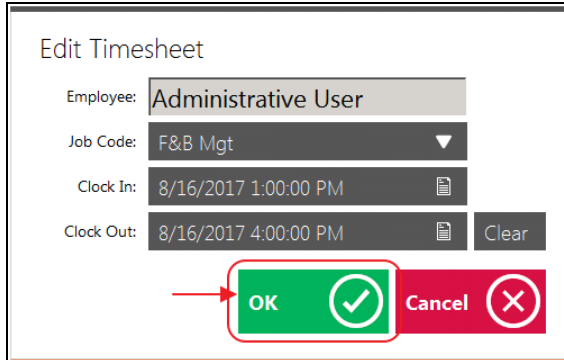
1

2

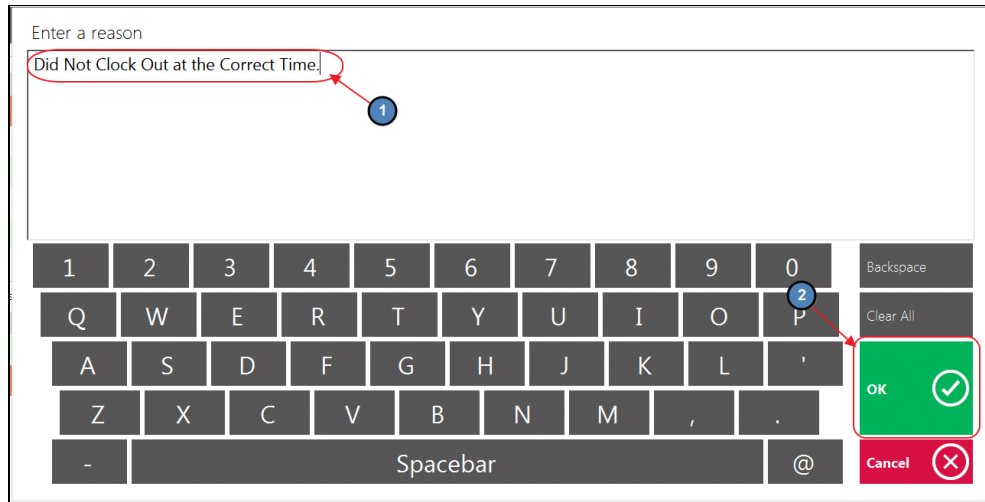
3

4

5) Select **OK** once edits are complete.



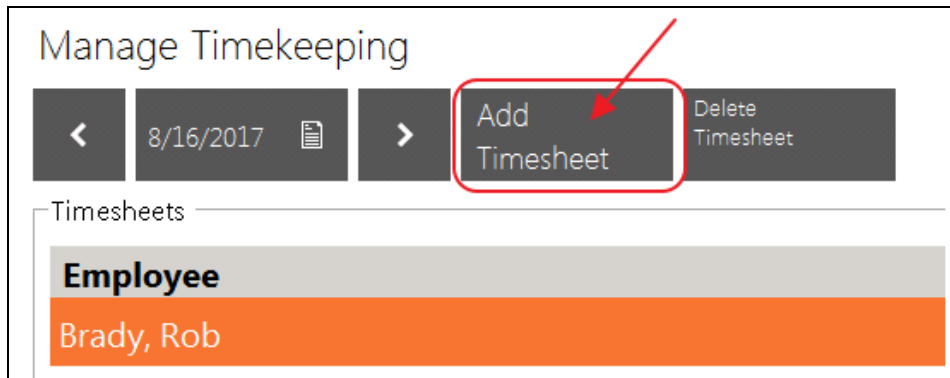
6) Lastly, **Enter a Reason** for editing the Timesheet.



## Creating a New Timesheet

To create a new **Timesheet**:

1) Select **Add Timesheet**,



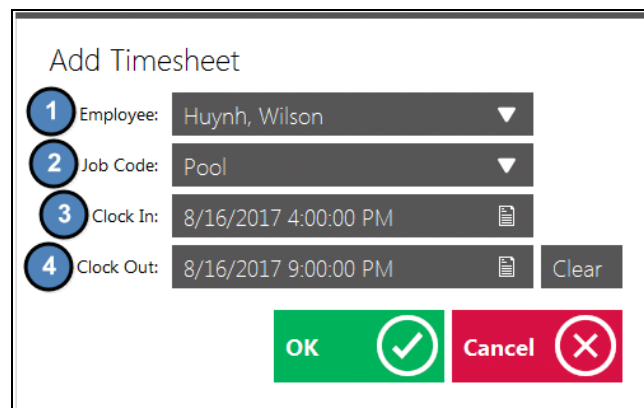
2) Populate the appropriate information for each of the below:

**Employee**

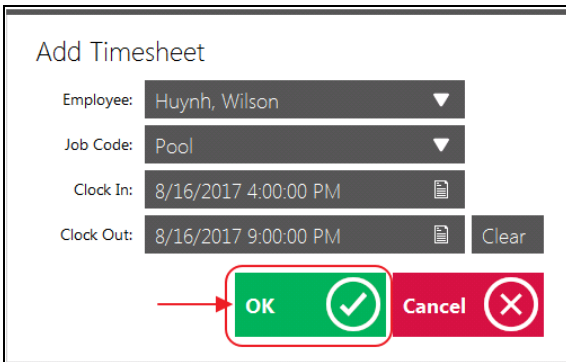
**Job Code**

**Clock In**

**Clock Out**



3) Click **OK** when finished.



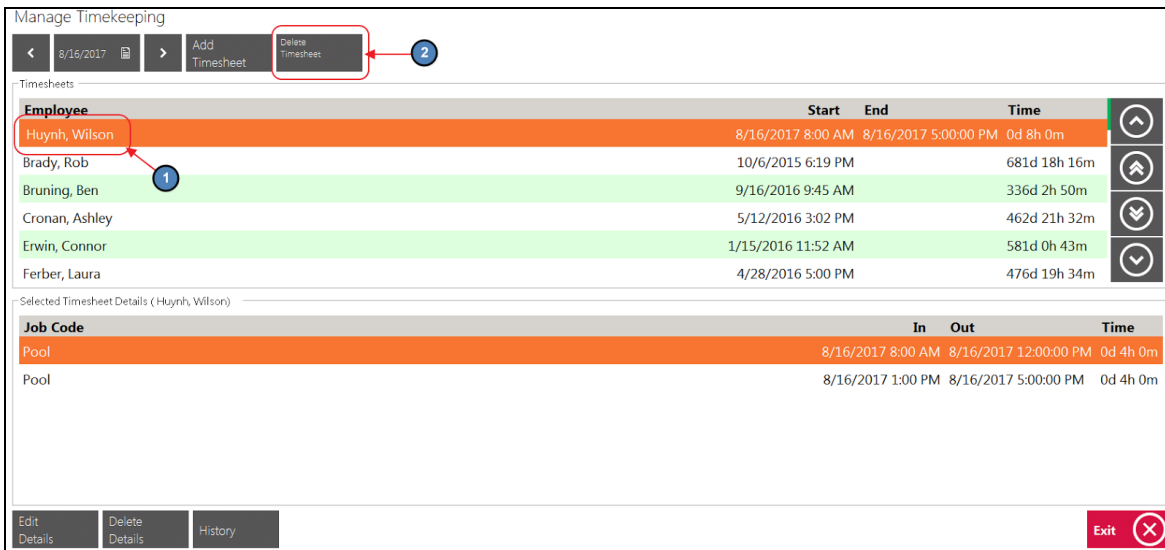
## Delete a Timesheet

There are two options when **deleting a Timesheet** in the **POS**. In this section, we will review each option.

**Please Note:** Any Timesheet associated with completed transactions cannot be deleted until all tickets associated with the Timesheet are transferred to another Employee. Please review our [System Tool Manual](#) for more information on Reopening, and Transferring Tickets.

### Option 1

- 1) Select the applicable **Employee** from the Grid and choose **Delete Timesheet**. This will delete each Timesheet (if there are multiples) associated with the Employee's Shift.



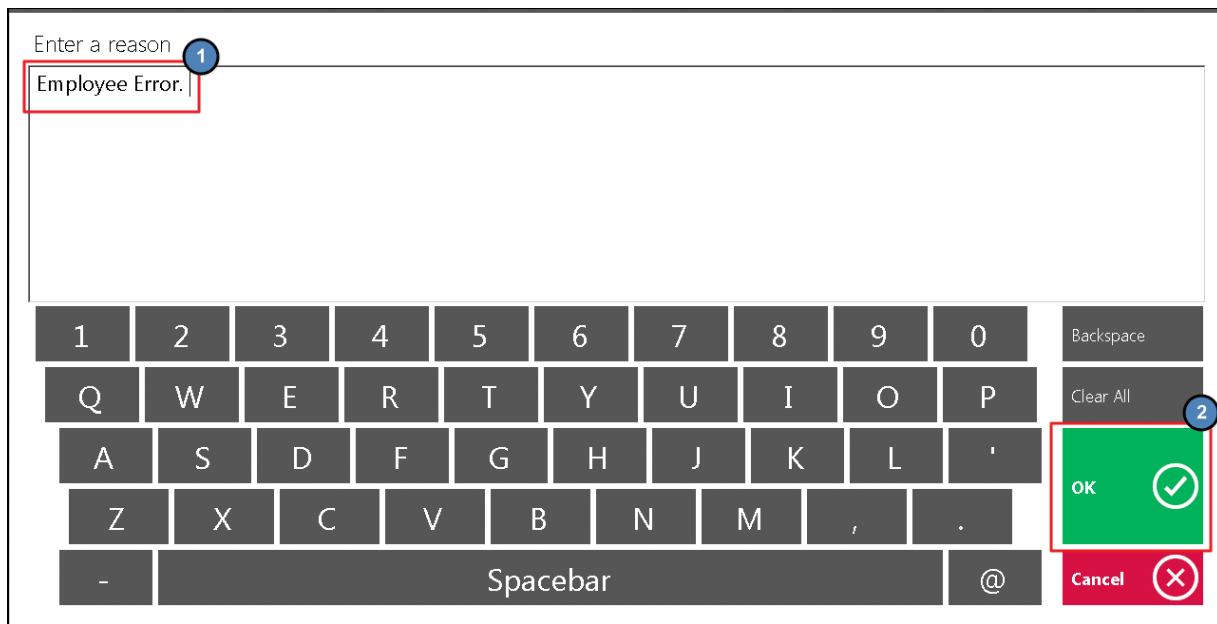
Employee	Start	End	Time
Huynh, Wilson	8/16/2017 8:00 AM	8/16/2017 5:00:00 PM	0d 8h 0m
Brady, Rob	10/6/2015 6:19 PM		681d 18h 16m
Bruning, Ben	9/16/2016 9:45 AM		336d 2h 50m
Cronan, Ashley	5/12/2016 3:02 PM		462d 21h 32m
Erwin, Connor	1/15/2016 11:52 AM		581d 0h 43m
Ferber, Laura	4/28/2016 5:00 PM		476d 19h 34m

Job Code	In	Out	Time
Pool	8/16/2017 8:00 AM	8/16/2017 12:00:00 PM	0d 4h 0m
Pool	8/16/2017 1:00 PM	8/16/2017 5:00:00 PM	0d 4h 0m



2) Next Enter a Reason for Deleting the Timesheet.



Enter a reason 1

Employee Error.

1 2 3 4 5 6 7 8 9 0 Backspace

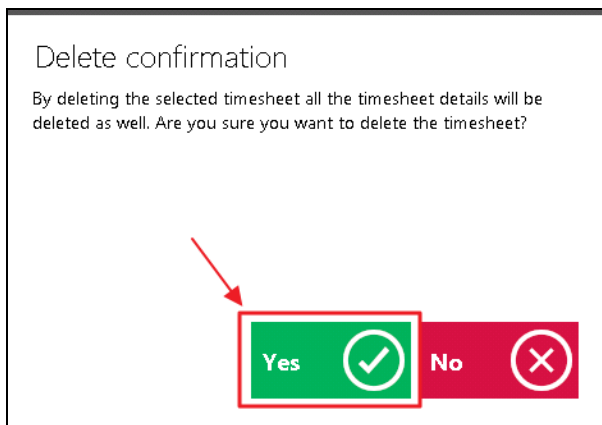
Q W E R T Y U I O P Clear All 2

A S D F G H J K L ' OK ✓

Z X C V B N M , .

- Spacebar @ Cancel ✕

3) Finally, **confirm** the Timesheet deletion. This will delete each Timesheet (If there are multiples) associated with the Employee's Shift.



Delete confirmation

By deleting the selected timesheet all the timesheet details will be deleted as well. Are you sure you want to delete the timesheet?

Yes ✓ No ✕

### Option 2

1. If only one Timesheet for a particular Shift needs to be deleted, select the applicable **Employee** from the top section of the Grid, then the appropriate **Timesheet** on the bottom section of the Grid, and then choose **Delete Details**.

**Please Note:** *If there is only one Timesheet associated with the Shift, either option can be used.*

Manage Timekeeping

8/16/2017 Add Timesheet Delete Timesheet

Timesheets

Employee	Start	End	Time
Huynh, Wilson	8/16/2017 8:00 AM	8/16/2017 5:00:00 PM	0d 8h 0m
Brady, Rob	10/6/2015 6:19 PM		681d 18h 16m
Bruning, Ben	9/16/2016 9:45 AM		336d 2h 50m
Cronan, Ashley	5/12/2016 3:02 PM		462d 21h 32m
Erwin, Connor	1/15/2016 11:52 AM		581d 0h 43m
Ferber, Laura	4/28/2016 5:00 PM		476d 19h 34m

Selected Timesheet Details (Huynh, Wilson)

Job Code	In	Out	Time
Pool	8/16/2017 8:00 AM	8/16/2017 12:00:00 PM	0d 4h 0m
Pool	8/16/2017 1:00 PM	8/16/2017 5:00:00 PM	0d 4h 0m

Edit Details Delete Details History Exit

2) Next Enter a Reason for Deleting the Timesheet.

Enter a reason

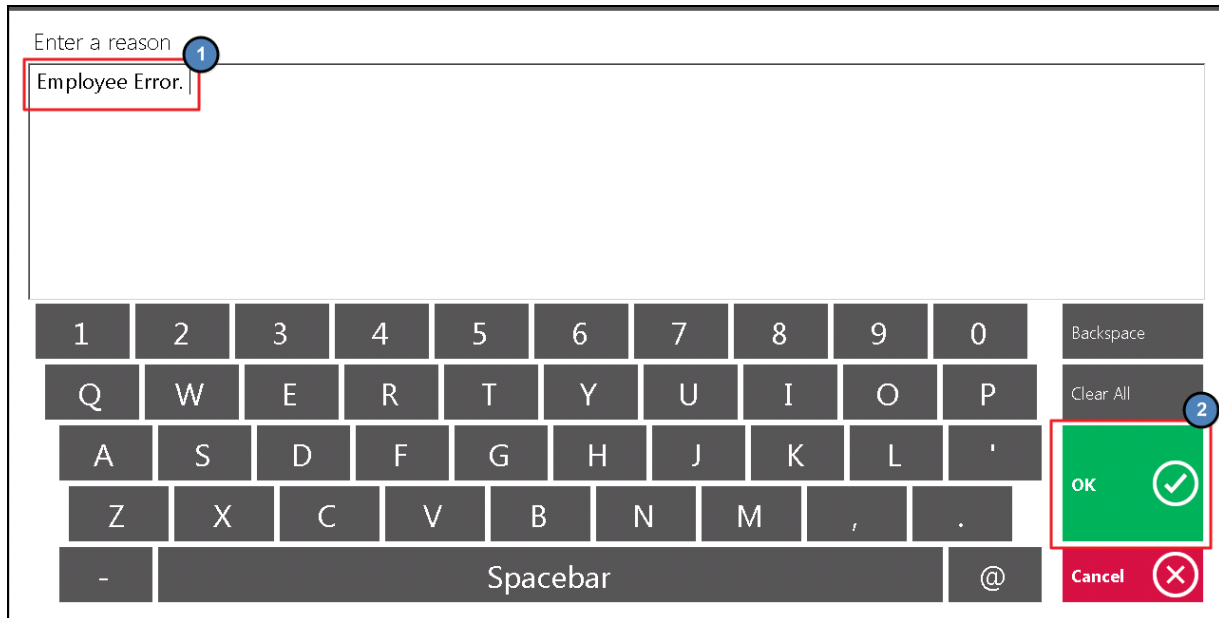
Employee Error.

1

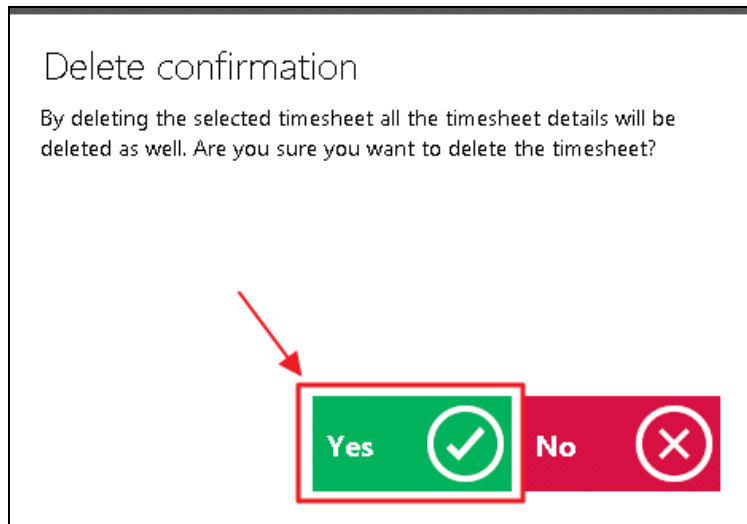
2

OK

Cancel



3. Finally, **confirm** the Timesheet deletion.



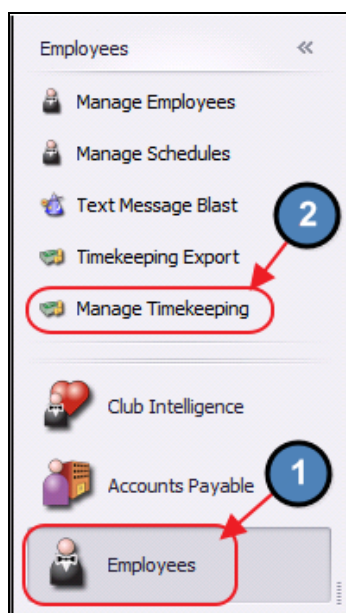
## Manage Timekeeping in Back Office

In this section, we will review the proper procedures to follow when **Managing Timekeeping** from the **Back Office System**.

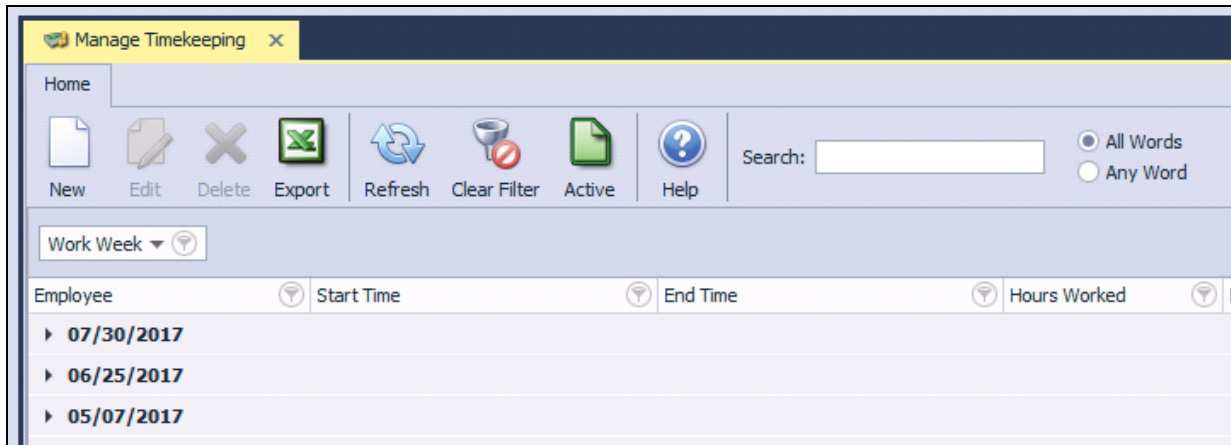
### Accessing the Tool

To access the **Manage Timekeeping** tool:

- 1) Select **Employees** from the left user menu and choose **Manage Timekeeping**.

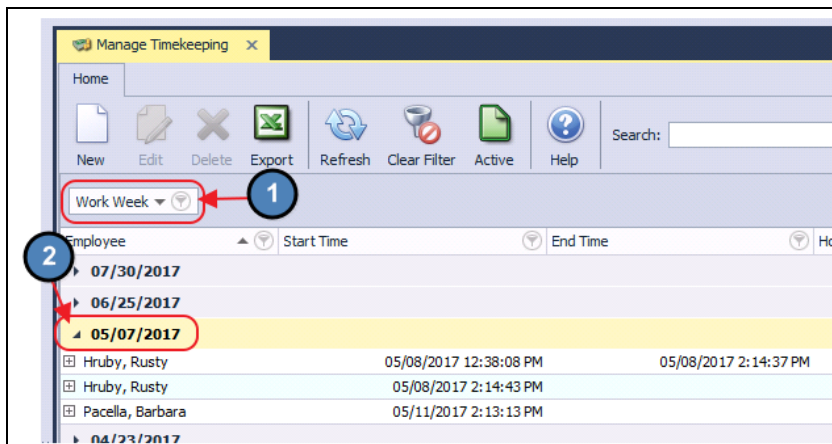


2) The **Manage Timekeeping Grid** will launch.



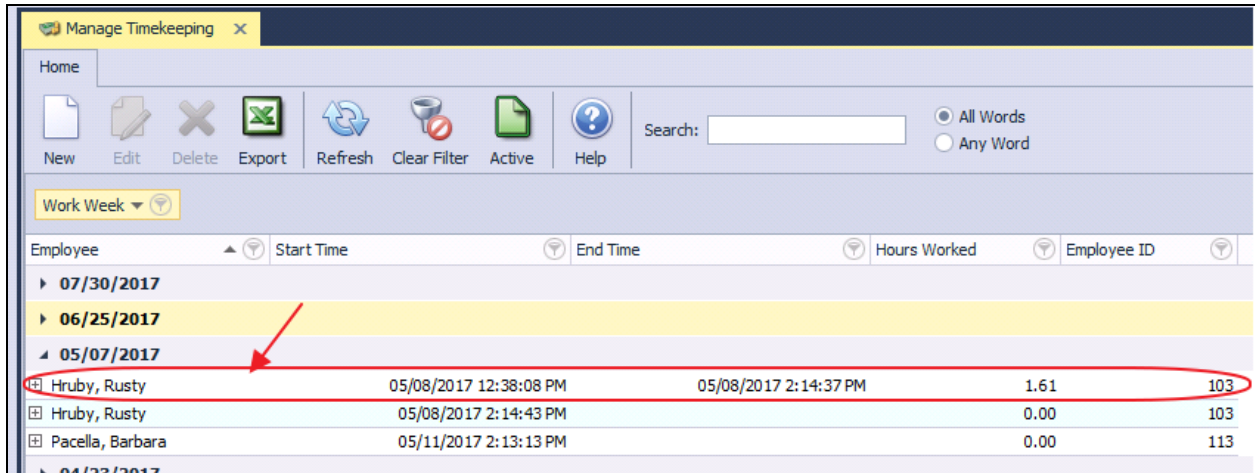
## Editing an Existing Timesheet

The **Manage Timekeeping Grid** is defaulted to Group Timesheets by **Work Week**. Users can expand the Work Week to view the individual Timesheets for the week.



To edit an existing Timesheet:

- 1) Expand the applicable **Work Week** and double-click the **Timesheet** that needs editing.



Employee	Start Time	End Time	Hours Worked	Employee ID
07/30/2017				
06/25/2017				
05/07/2017				
Hruby, Rusty	05/08/2017 12:38:08 PM	05/08/2017 2:14:37 PM	1.61	103
Hruby, Rusty	05/08/2017 2:14:43 PM		0.00	103
Pacella, Barbara	05/11/2017 2:13:13 PM		0.00	113

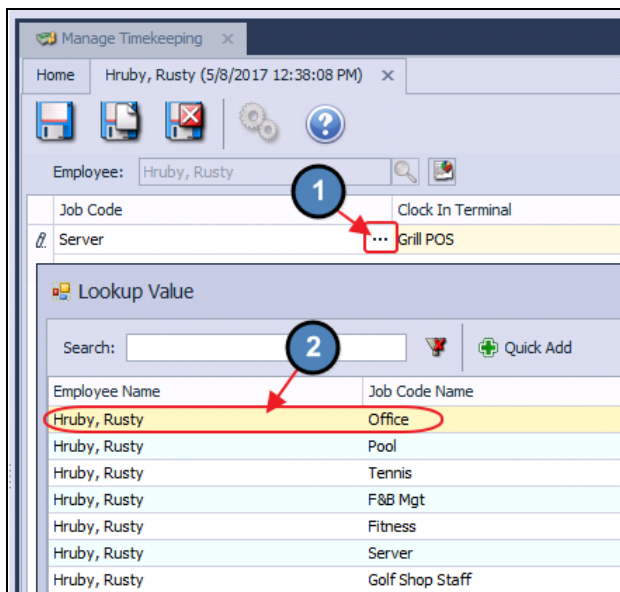
2) Please review each available option below:



Job Code	Clock In Terminal	Clock In	Clock Out Terminal	Clock Out	Time
Server	... Grill POS	5/8/2017 12:38 PM	Grill POS	5/8/2017 2:14 PM	0d 1h 36m

### Job Code

The Job Code assigned to a particular Timesheet can be edited under the **Job Code** column. The Lookup Value will display all Job Codes assigned to the Employee.



Employee Name	Job Code Name
Hruby, Rusty	Office
Hruby, Rusty	Pool
Hruby, Rusty	Tennis
Hruby, Rusty	F&B Mgt
Hruby, Rusty	Fitness
Hruby, Rusty	Server
Hruby, Rusty	Golf Shop Staff

### Clock In Terminal

The **Terminal** in which the Employee clocked in can be edited under this column.

Job Code	Clock In Terminal	Clock In
Server	Grill POS	5/8/2017 12:38 PM

### Clock In

The **Clock In Date/ Time** of a particular Timesheet can be edited under this column. Select the **Drop Down** arrow for a more user friendly interface, or type in the appropriate Clock In Date/Time.


Clock In	Clock Out Terminal	Clock Out
5/8/2017 12:38 PM	Grill POS	5/8/2017 2:14 PM

Tuesday, August 15, 2017

May, 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Clear
OK
Cancel



12:38:08 PM

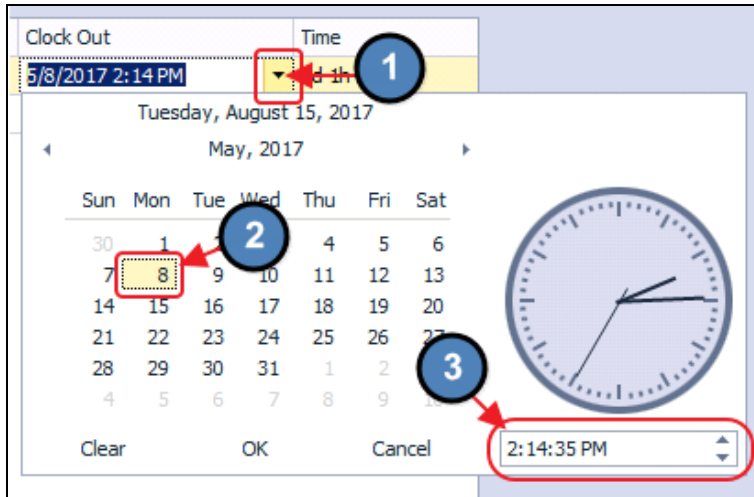
### Clock Out Terminal

The **Terminal** in which the Employee Clocked Out can be edited under this column.

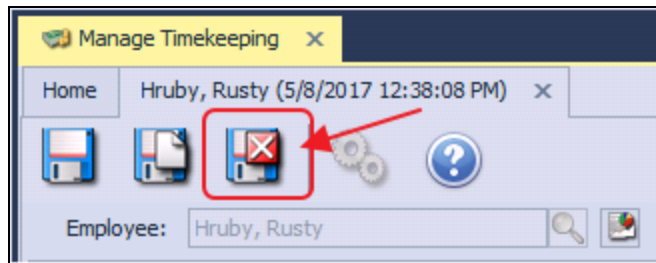
Clock Out Terminal	Clock Out	Time
Grill POS	5/8/2017 2:14 PM	0d 1h 36m

## Clock Out

The **Clock Out Date/Time** of a particular Timesheet can be edited under this column. Select the **Drop Down** for a more user friendly interface, or type in the appropriate Clock Out Date/Time.



3) Select **Save & Close**.



## Creating a New Timesheet

To create a new Timesheet:

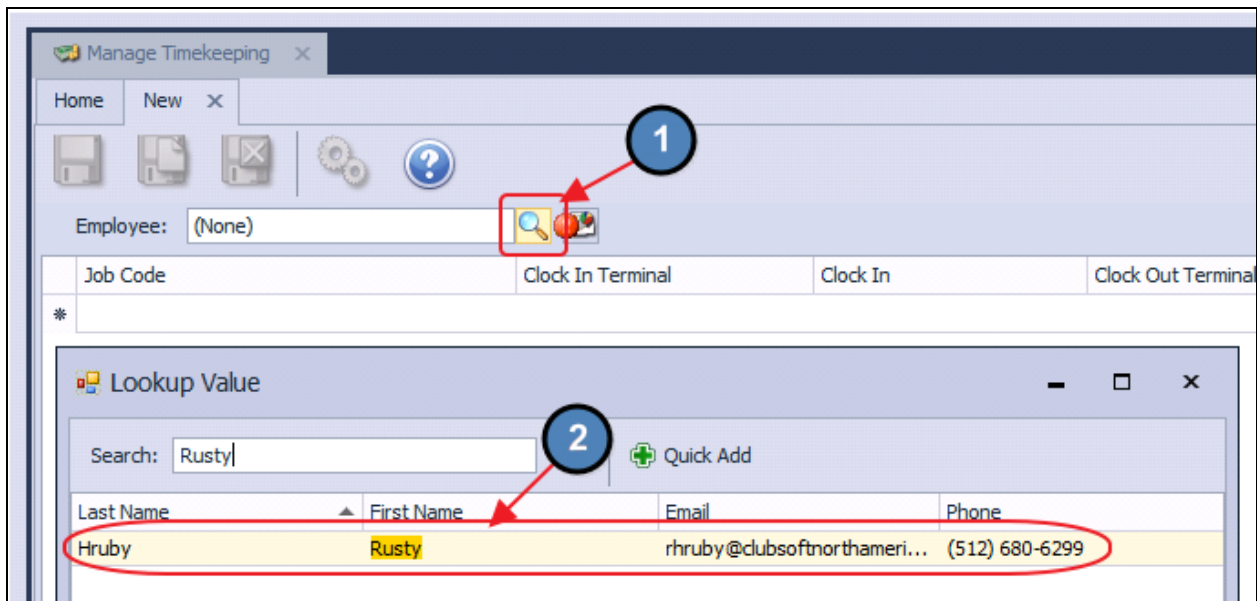
1) Select the **New** icon on the toolbar.



2) The **Timesheet** setup screen will launch.



3) Select the **Employee** for which the Timesheet is being entered.



4) Populate the appropriate information for each of the columns below:

**Job Code**

**Clock In Terminal**

**Clock In**

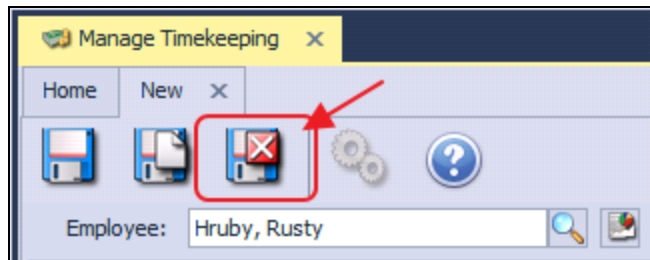
**Clock Out Terminal**

**Clock Out**





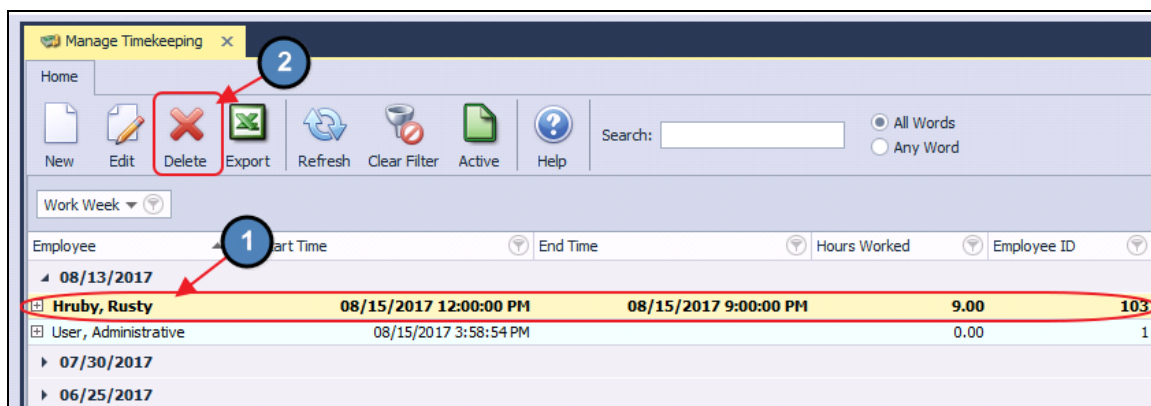
5) Select **Save & Close**.



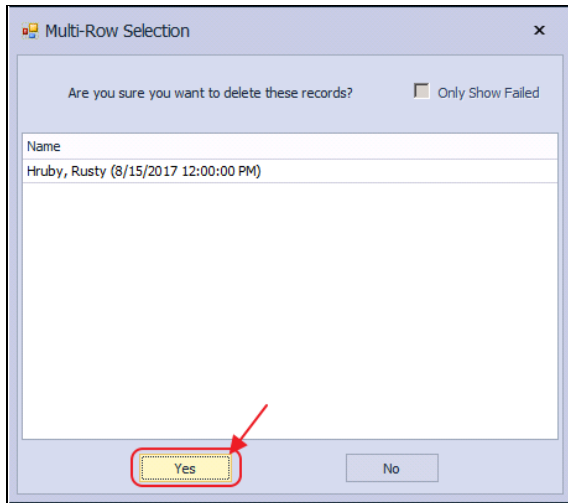
## Delete a Timesheet

To delete a Timesheet, select the applicable Timesheet from the Grid and choose **Delete** on the toolbar.

**Please Note:** Any Timesheet associated with completed transactions cannot be deleted until all tickets associated with the Timesheet are transferred to another Employee. Please review our [System Tool Manual](#) for more information on Reopening, and Transferring Tickets.



Select, **Yes** on the Confirmation Prompt.



## Best Practices

1. If having to continually make significant edits to timesheets, review Clock In/Clock Out procedures with Employees to ensure they understand the process.
2. Utilize the drill-down feature in **Timekeeping in Back Office** to effectively view employee information while creating a new Timesheet.

## Common Questions and Concerns

**Q: The system will not allow me to delete an employee's Timesheet. What can I do?**

A: Any **Timesheet** associated with completed transactions cannot be deleted until all tickets associated with the Timesheet are transferred to another Employee. Please review our [System Tool Manual](#) for more information on Reopening, and Transferring Tickets.