Labor Manager

Quick Reference Guide

Workforce Management Solutions

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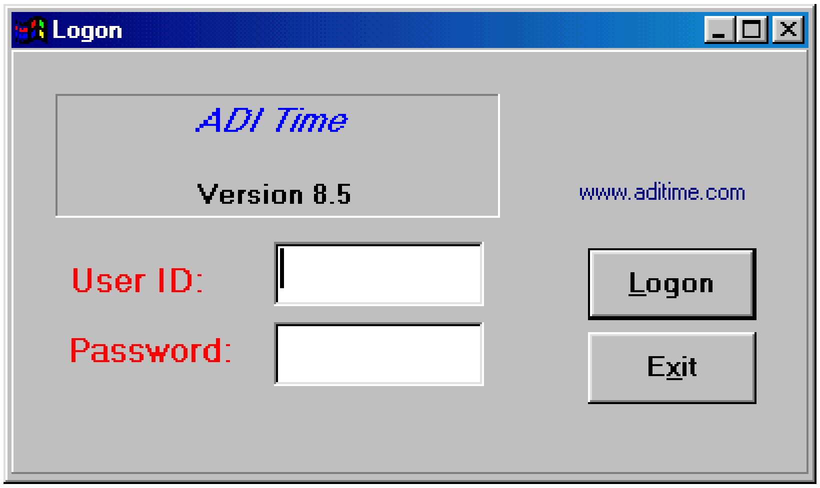
Starting ADI Time Labor Manager

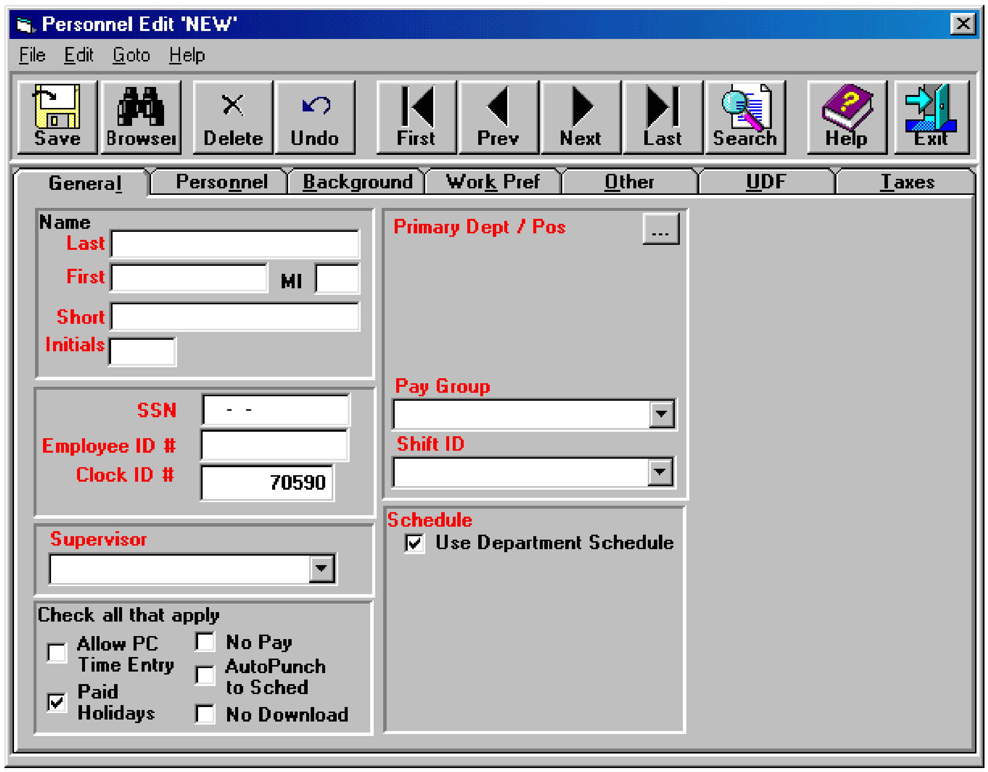
1. Click the Windows **Start** button and select **Programs**, **ADI Time**, **Labor Manager**. The **Logon** dialog box will appear.



2. Type your user ID.
3. Press the **Tab** key to advance to the **Password** field.
4. Type your password
5. Click the **Logon** button *or* press the **Enter** key. If your user ID and password are accepted, the Labor Manager menu will appear.

Adding an Employee

1. From the Labor Manager menu, click the **Personnel** button to open the **Employee Browser**.
2. Click the **New** button to open the **Personnel Edit** dialog box.



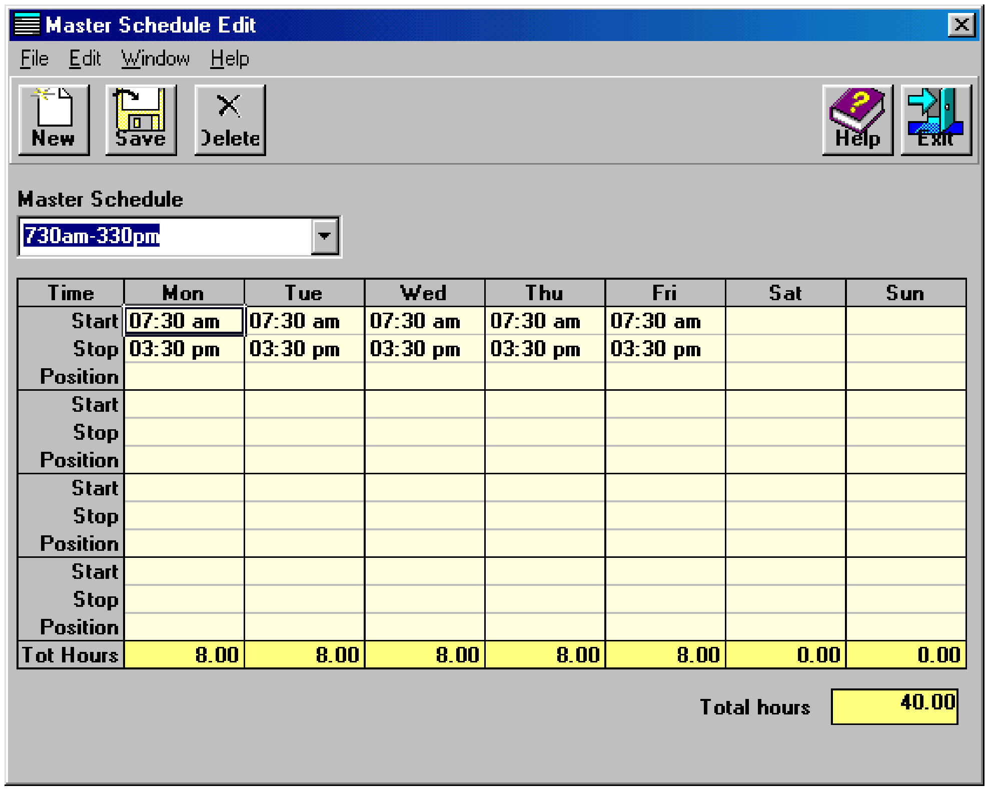
3. Fill in the applicable fields on each tab. Fields labeled in red are required (these are located on the General and Personnel tabs only).
4. Click the **Save** button.
5. Click the **Browse List** button (binoculars) to return to the Employee Browser.
6. Repeat steps 2-5 for each additional employee.
7. Click the **Exit** button to close the Employee Browser.

Refer to your *System Reference Manual* for more information about adding employees.

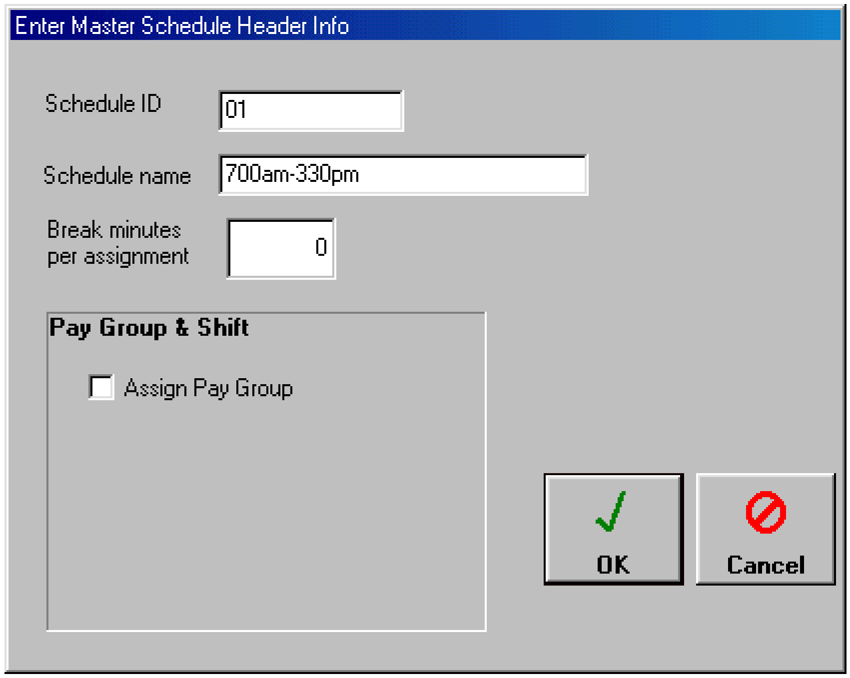
Master Schedules

Adding a master schedule

1. From the Labor Manager menu, click the **Scheduling Menu** button.
2. Click the **Master Schedule** button to open the **Master Schedule Edit** dialog box.



3. Click the **Create New** button. This will open the **Enter Master Schedule Header Info** dialog box.



   a. Fill in the following fields:

      Schedule ID: This can be either a number or a letter.

      Schedule name: This can be anything you choose, e.g. scheduled hours (as shown).

      Break minutes per assignment: Type the number of scheduled break minutes per day.

   b. Click the **OK** button (green checkmark) when finished.

4. Enter the new schedule on the Master Schedule Edit dialog box.

   a. To set the start time, click the cell in the **Start** row under the appropriate day. Type the start time (for example, you would type **0730a** for 7:30 AM).

   b. To set the stop time, click the **Stop** cell beneath the Start cell you just filled in. Type the end time.

   c. Repeat steps **a** and **b** for each day you are scheduling. If subsequent days will have the same schedule, you can click the **Fill** button to copy the first day's schedule to as many days as you specify.

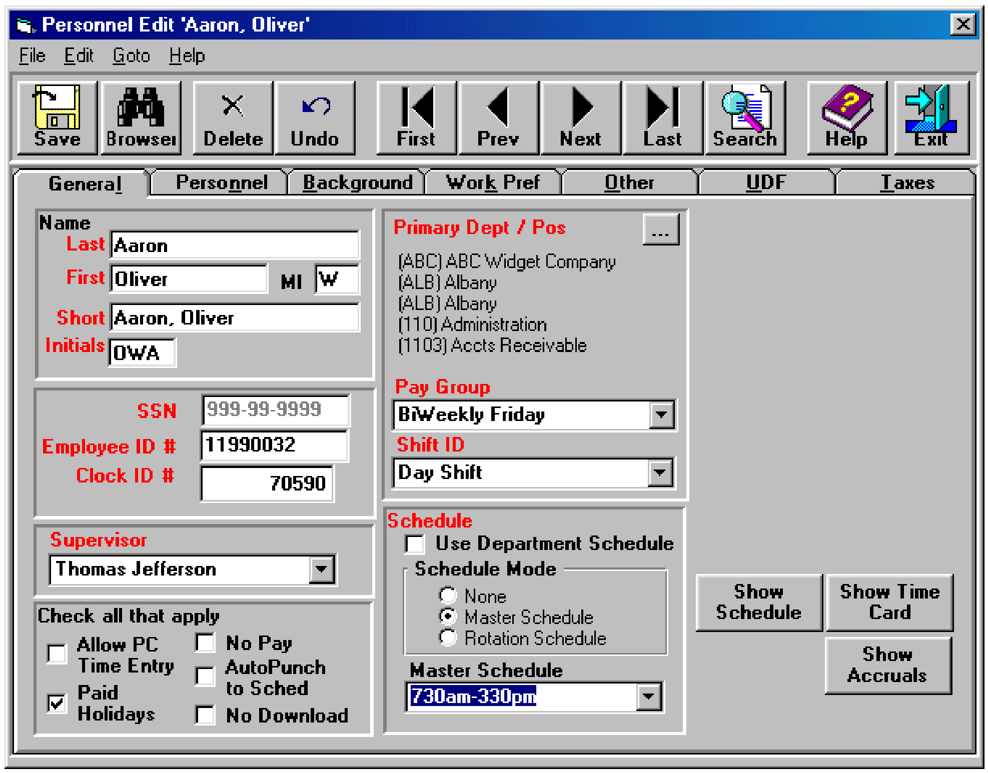
5. Click the **Save** button.

6. Click the **Exit** button to close the Master Schedule Edit dialog box.

Applying a master schedule to an employee

1. From the Labor Manager menu, click the **Personnel** button.

2. Click the **All** button (to the right of **Z**) to display a list of employees. Double-click the employee to which you want to apply the schedule. This will open their **Personnel Edit** dialog box.



3. Clear the check from **Use Department Schedule**. This will activate the Schedule Mode option from which you select **Master Schedule**.

4. Choose a schedule from the **Master Schedule** list.

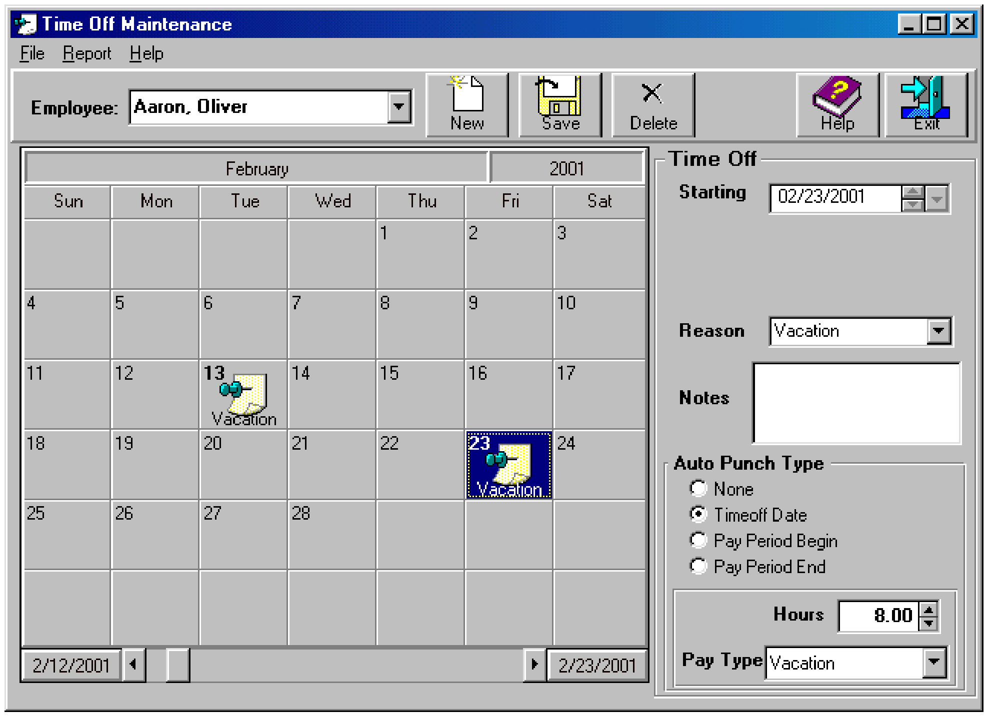
5. Click the **Save** button.

6. Click the **Exit** button to close the Personnel Edit dialog box.

Refer to your *System Reference Manual* for more information.

Scheduling Time Off

1. From the Labor Manager menu, click the **Scheduling Menu** button.
2. Click the **Time Off** button to open the **Time Off Maintenance** dialog box.



3. Select an employee from the **Employee** list.
4. Click the drop-down arrow to the right of **Starting** (on the right-hand side of the screen) to open a calendar from which you can select the start date.
5. Click the drop-down arrow to the right of **Ending** to open a calendar from which you can select the end date.
6. Choose a reason from the **Reason** list.
7. You can type comments in the **Notes** box. These will appear on the Advance Days Report, and on the Miscellaneous Pay dialog box.
8. If you would like scheduled days off to appear on the time card, select an **Auto Punch Type**:

   None: Scheduled days off will **not** appear on the time card.

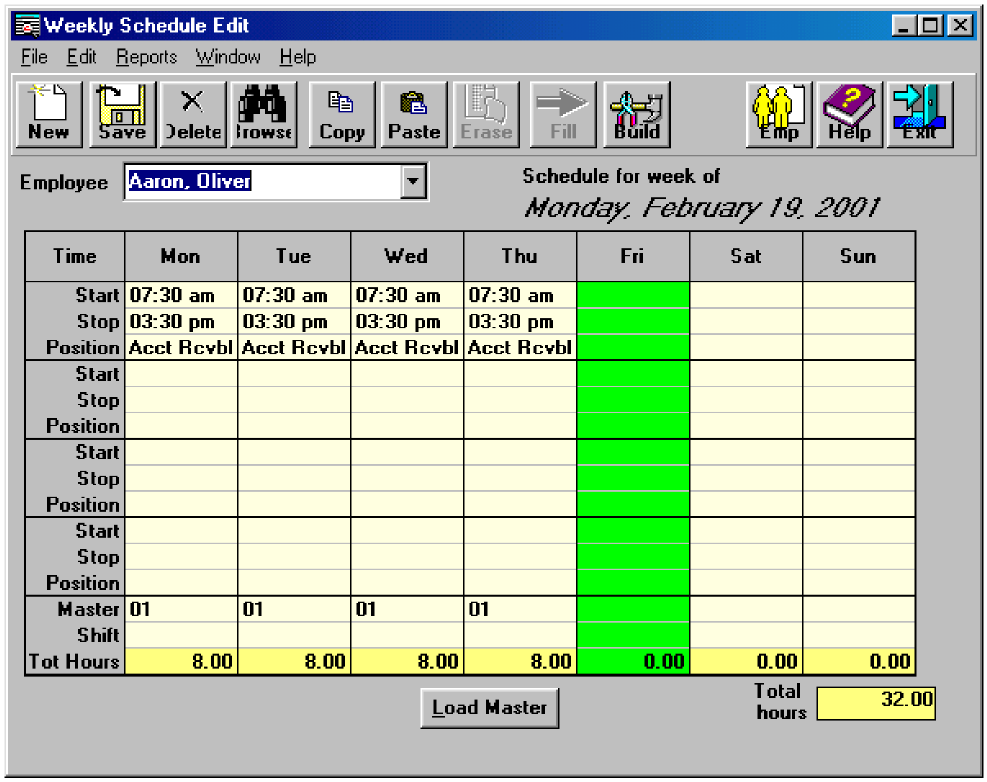
   Timeoff Date: The time off will be displayed under the day it is scheduled and the employee will be paid for the time during that pay period.

Pay Period Begin/Pay Period End: The total number of hours will be displayed at the beginning or end of the pay period instead of under each day. Click the **Select Period** button to choose the pay period in which the employee should be paid for the time off. This is used mainly for paying time off in advance.

9. Enter the number of hours ***per day*** that the employee should be paid.
10. Select a pay type from the **Pay Type** menu.
11. Click the **Save** button.
12. Click the **Exit** button to close the Time Off Maintenance dialog box.

Weekly Schedule Edit

1. From the Labor Manager menu, click the **Scheduling Menu** button.
2. Click the **Weekly Schedule** button to open the **Weekly Schedule Edit** dialog box. You will be prompted for the week's start date.

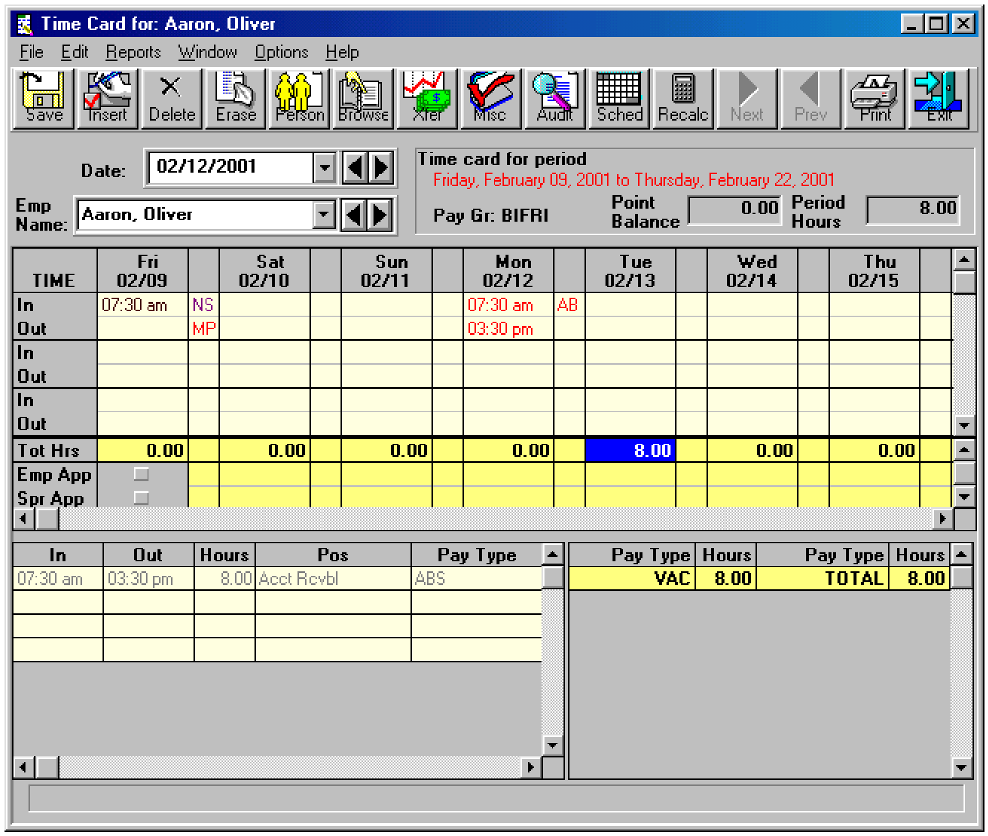


3. Select an employee from the **Employee** list.
4. If this employee does not have a schedule, you can click the **Load Master** button to assign a master schedule to him or her.
5. If you want to change a time, click on the cell and type the new time (for example, you would type **0730a** for 7:30 AM).
6. Click the **Save** button.
7. Click the **Exit** button to close the Weekly Schedule Edit dialog box.

Note: The weekly schedule displays days off in green. If you click anywhere on the green, the time-off reason code will be displayed in the lower left corner of the screen. The schedule will not load on a day(s) that an employee has scheduled off.

Editing the Time Card

1. From the Labor Manager menu, click the **Time Card Edit** button.



2. Select an employee from the **Emp Name** list to display that employee's time card.
3. To view a different pay period, select it from the **Date** drop-down list or click either the left or right arrow to change one week at a time.

A blue background in the **Tot Hrs** field indicates that time off has been scheduled for that day.

If time card approval is enabled, the supervisor must select the **Spr App** field for each day.

Entering a missing *out* punch

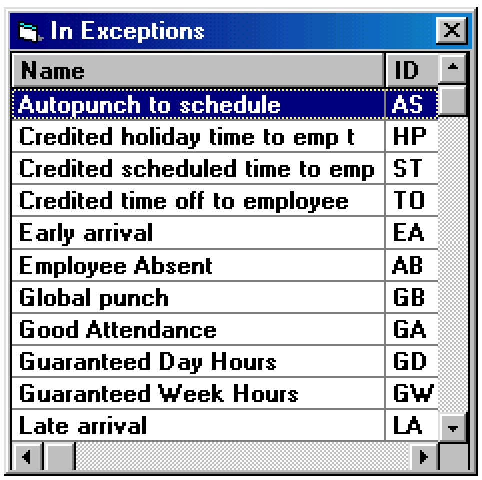
1. Click on the cell below the **In** punch.
2. Type in the time (for example, you would type **0730a** for 7:30 AM). Entries can also be made by double-clicking the cell to display a calendar.
3. If applicable, assign a reason code to the punch by clicking the **Rea** cell in the bottom portion of the screen. Select a reason from the list displayed.

Entering a missing *in* punch

1. Click the cell where you want to insert the punch.
2. Click the **Insert** button to display a calendar.
3. Select the hour, minute, and AM or PM.
4. Click the **Save** button.

Changing an exception code

1. Click on the exception code. This will display the **Exceptions** dialog box.



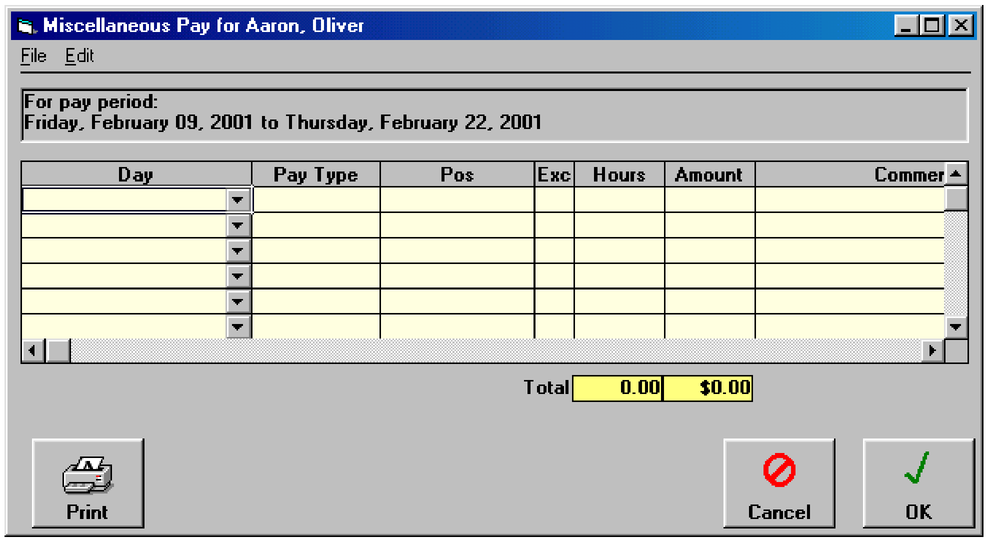
2. Select a new exception code.
3. Assign a reason code to the transaction by clicking the **Rea** cell in the bottom portion of the screen. Select a reason from the list displayed.
4. You can delete an exception code by right-clicking it and selecting **erase exception**.
5. Click the **Save** button.

Miscellaneous pay

This screen can be used to add a new miscellaneous pay entry or to change an existing entry. It is commonly used to change the pay type of an existing entry from absent to vacation, holiday or sick.

Adding a miscellaneous pay entry

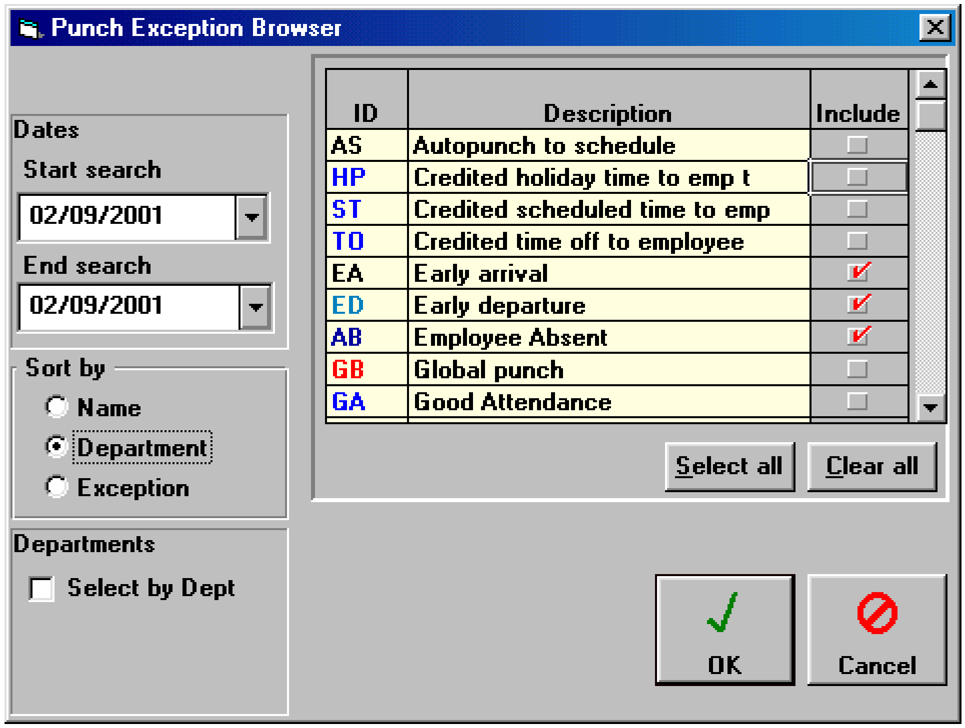
1. Click the **Misc** button on the Time Card Edit dialog box to display the **Miscellaneous Pay** dialog box.



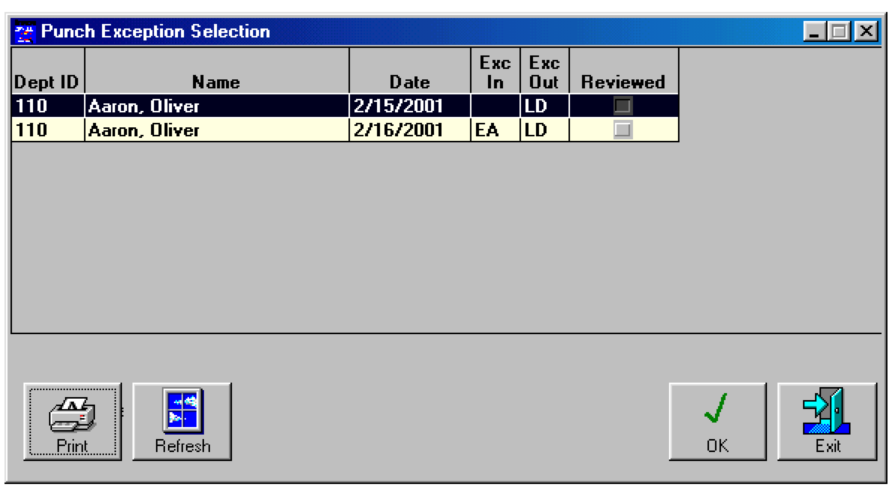
2. Select the day from the **Day** list.
3. Click the **Pay Type** cell and select a pay type from the list.
4. If applicable, click the **Position** cell and select a position from the list.
5. Type the number of hours to be paid in the **Hours** cell ***or*** type the number of dollars in the **Dollars** cell.
6. Type a comment (optional).
7. Click the **OK** button (green checkmark) when finished. The **Tot Hrs** field on the time card will have a blue background to indicate a miscellaneous pay entry.

Generate a List of Employee Exceptions

1. Click the **Browse Punch Exceptions** button (open book) on the Time Card Edit dialog box to display the **Punch Exception Browser** dialog box.



2. Select your search dates from the **Start search** and **End search** lists.
3. Choose how to sort the results: by name, department or exception.
4. To search only certain departments, click **Select by Dept**.
5. Select the **Include** check box for each exception you want to include.
6. Click **OK** (green checkmark) to generate the exception list.

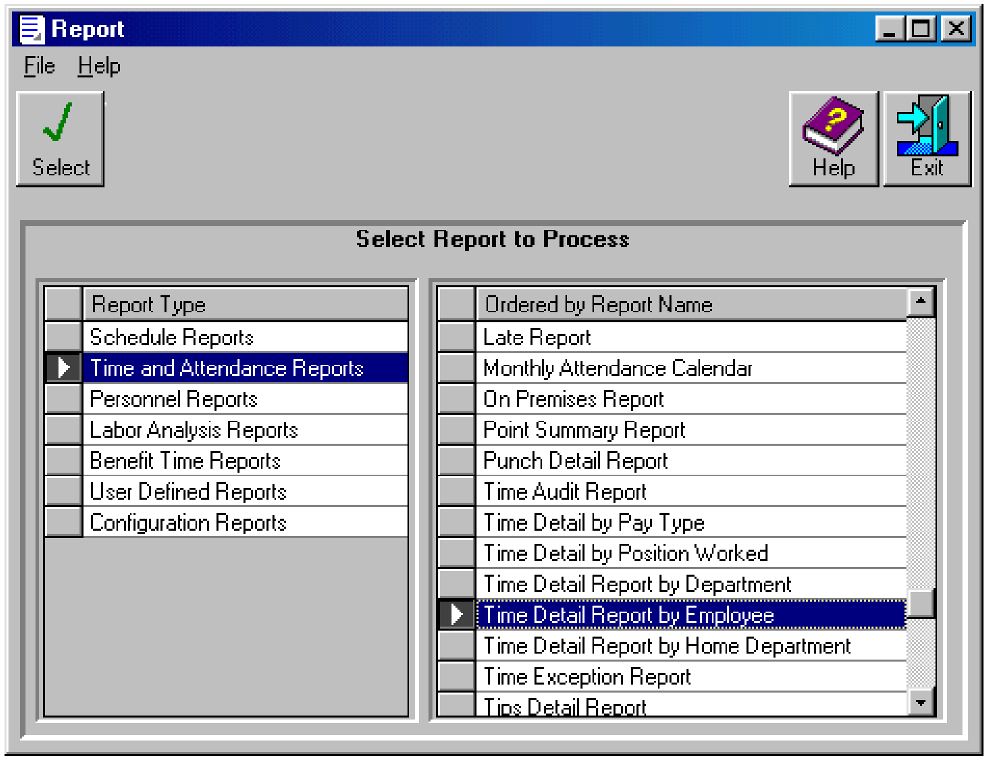


Editing employee exceptions

1. Double-click the line you want to edit. This will open the employee's time card.
2. Make any necessary changes.
3. Click the **Save** button.
4. Click the **Browser** button to return to the list of exceptions. You will see a checkmark in the **Reviewed** column of the exception you edited.

Reports

1. From the Labor Manager menu, click the **Reports** button.

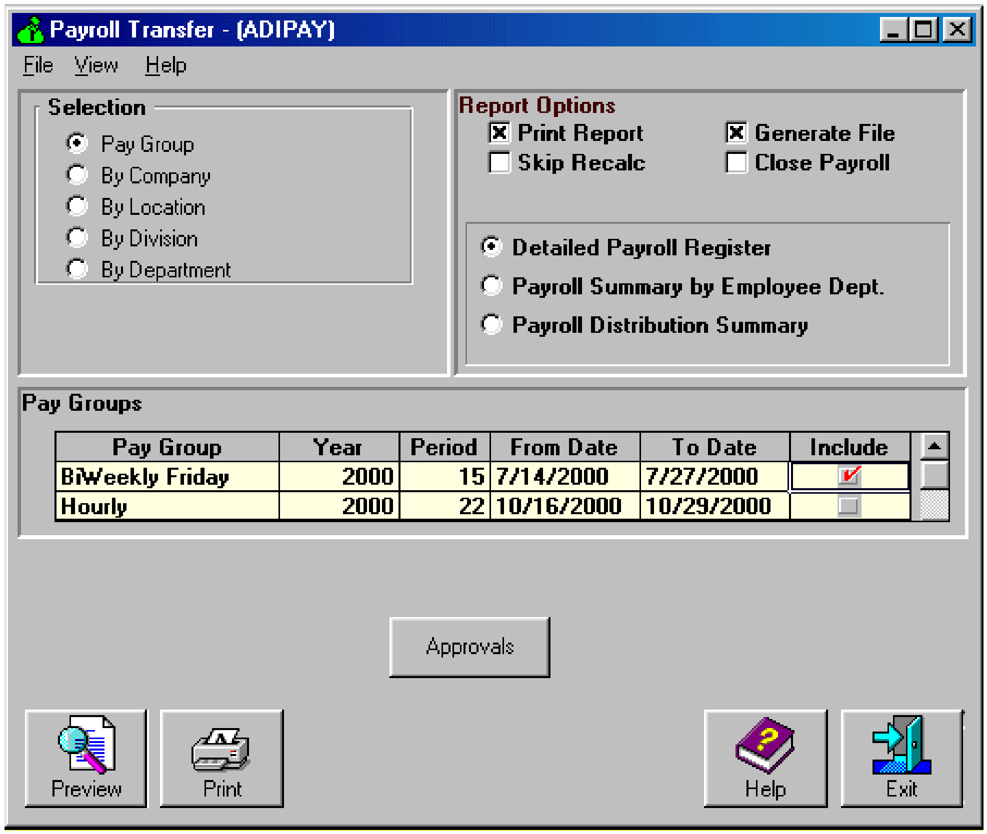


2. In the left-hand column, select a report type.
3. In the right-hand column, select a report by double-clicking it. This will open a report criteria dialog box.
4. Select the criteria for your report (e.g. date and organization level).
5. Click the **Preview** button to view the report or the **Print** button to print the report.
6. Click the **Exit** button to close the Report dialog box.

Refer to your *System Reference Manual* for more information about reports.

Payroll Transfer

1. From the Labor Manager menu, click the **Payroll** button to open the **Payroll Transfer** dialog box. Click **OK** if you receive the message "*Warning: There are records which have yet to be posted!*"



2. Under **Selection**, choose the payroll data you want to work with. The default setting is Pay Group; if you keep this setting, select the pay group(s) by clicking its **Include** check box on the bottom half of the dialog box. If you select Company, Location, Division or Department, a button will appear which allows you to select which company, location, etc you want to work with.

3. To change the dates, double-click the **Period** cell. Change the period using the up or down arrow; the dates will reflect the change.

4. Under **Report Options**, select one or more of the following:

   Print Report: We recommend that you print a report before closing payroll to ensure that the payroll data is correct. Selecting this option will activate a list of reports from which you must select one.

   Skip Recalc: If a scheduled task has already calculated payroll, you can select this option to prevent recalculation, which saves a significant amount of time. If a scheduled task did not calculate payroll, do not select this option.

   Generate File: If you transmit your payroll information to a payroll vendor, select this option to create the payroll transfer file.

   Close Payroll: After you have reviewed the data and made any necessary changes, select this option to close the payroll period. This will prevent any changes to the data.

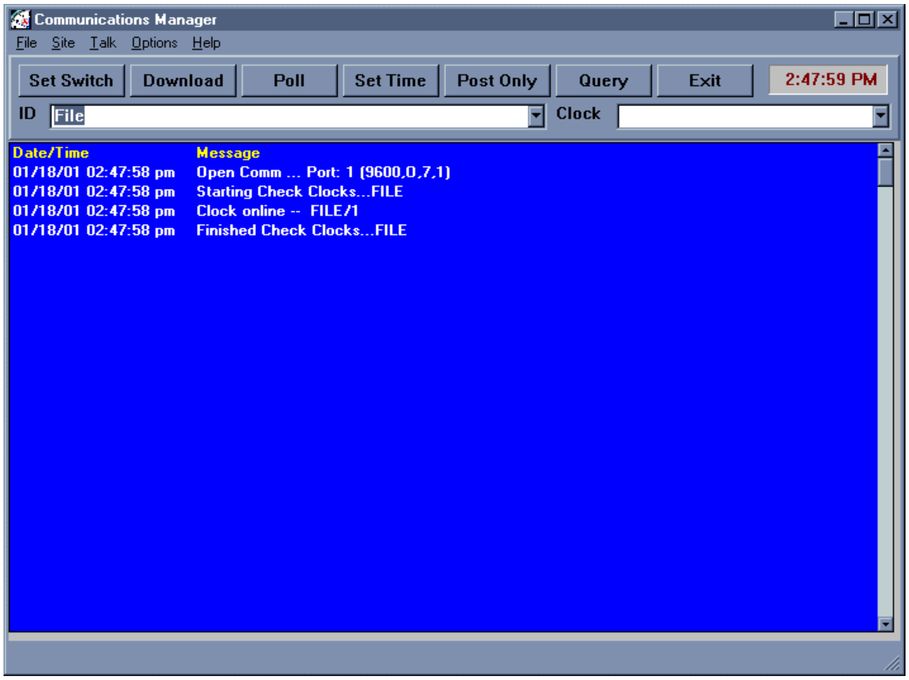
   Purge Old Data: This box will appear if **Close Payroll** is selected. We recommend you select this option to keep your database running efficiently.

5. If you have an **Approvals** button, your system is configured to require time card approval. Click this button to view time cards that have not yet been approved. You cannot close the pay period until all time cards have been approved.

6. Click either the **Preview** button or the **Print** button to execute the process.

Clock Communications

1. Click the Windows **Start** button and select **Programs**, **ADI Time**, **Clock Communications**. This will open the **Communications Manager**.



2. Select a clock from the **ID** list.

3. **Poll and Post**: This polls punches from the clock and posts them to the time card. To do this, click **Talk** on the menu bar and select **Poll and Post**.

4. You can perform any of the following functions by using the buttons at the top of the screen:

   Set Switch: Updates the clock with any new or changed configurations.

   Download: Downloads new information to the clock (e.g. badge numbers or schedules).

   Poll: We recommend you use the **Poll and Post** feature described in step 3 instead.

   Set Time: Sets the time at the clock.

   Post Only: We recommend you use the **Poll and Post** feature described in step 3 instead.

   Query: Displays information stored in the clock.

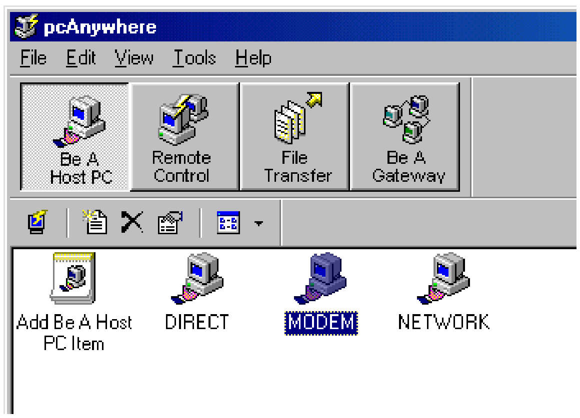
   Exit: Closes the Communications Manager.

Using pcAnywhere

If you call ADI Technical Support we may need to connect to your computer via pcAnywhere. This allows us to see your computer screen so that we can better resolve your issue.

Connecting to ADI

1. Click the Windows **Start** button and select **Programs**, **pcAnywhere** or **Symantec pcAnywhere**.



2. The **Be a Host PC** button should be depressed (as shown above). If it is not, click to select it.

3. Right-click the **Modem** icon and select either **Call Remote** or **Connect**.

4. Type the ADI Technical Support modem number. Click **OK** to connect.

5. When the support call is complete, click **File** on the menu bar and select **Exit** to disconnect the call and close pcAnywhere.

Allowing ADI to connect to you

1. Follow steps 1 and 2 above.

2. Click once on the **Modem** icon to highlight it.

3. Click **Talk** on the menu bar and select **Wait for Connection**. PcAnywhere will become minimized and the connection should be established.

4. When the support call is complete, click **File** on the menu bar and select **Exit** to disconnect the call and close pcAnywhere.