

# Training guide:

# **Attendance**





For more information about North Time Pro products, version updates, datasheets and reports, please refer to the North Time Pro website:

www.ntdltd.com

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North Time Pro





# Contents

Course Duration

tw21/op/att001
An introduction to attendance

Approximately 45 minutes

**Module Description** 

m/04/101 understanding North Time Pro attendance

m/04/110 adjustments

m/04/120 planner

m/04/130 attendance anomalies on the 'To-Do' List

m/04/140 static register overtime

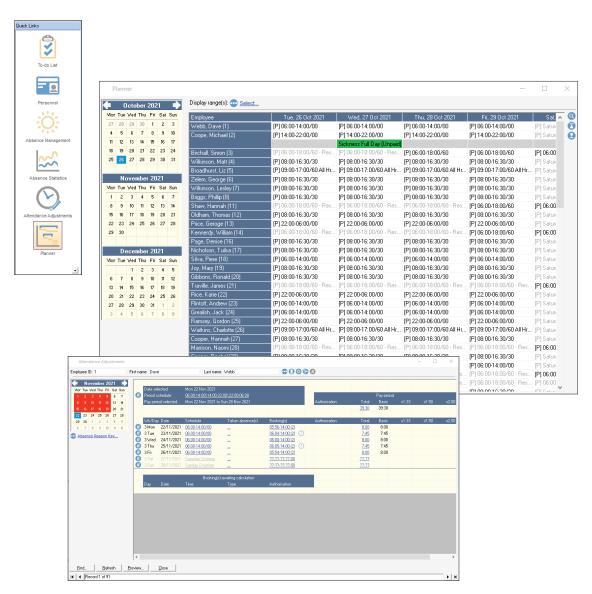
All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.





## m/04/101 Understanding North Time Pro attendance

North Time Pro attendance covers the adjustment screen, planner and the attendance anomalies presented on the 'To-Do' List summary.



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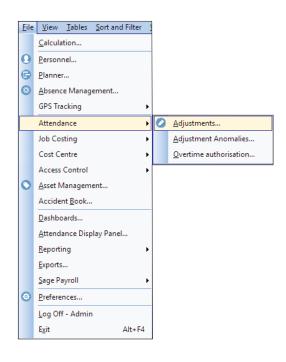


# m/04/110 Adjustments

1. Click on the Attendance Adjustment Quick Link,

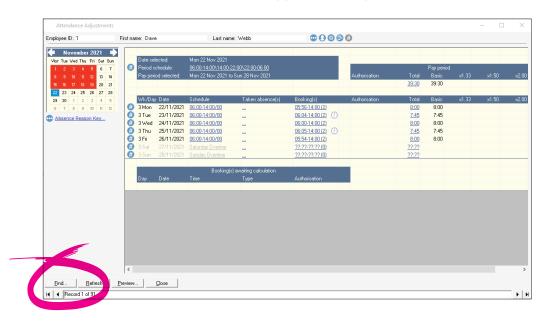


or select <File>, then <Attendance> then <Adjustments>... from the menu.

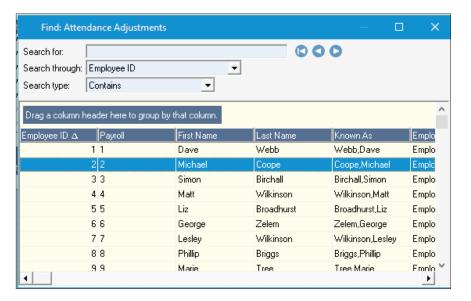




2. The adjustment screen will then appear at the person from the users last log in.

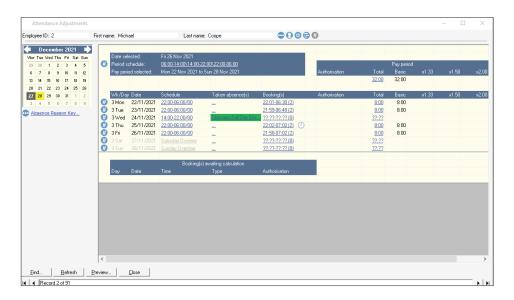


**3.** Click <Find> and search for the person whose bookings you wish to view or amend.





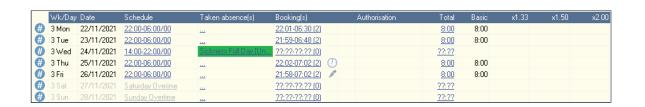
**4.** The person's bookings will then appear for the current period.



**5.** To navigate to a different date use the calendar control.

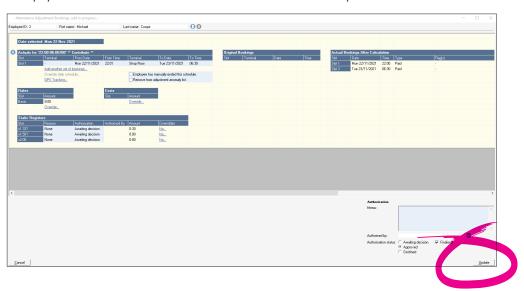


**6.** Click on the booking to view/amend the actual bookings for the selected day.





**7.** From this screen, the user may add new bookings, amend or delete existing bookings, or simply override the total hours worked for the day.



All amendments are audited by North Time Pro. The / icon denotes a manual change.



- **8.** Click on <Update> to save and recalculate the changes, and then return to the adjustments screen.
- **9.** Finally, to leave the adjustments screen, click <Close>.



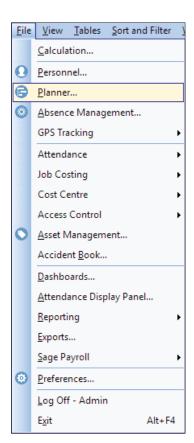


### m/04/120 Planner

1. Click on the <Planner> Quick Link,

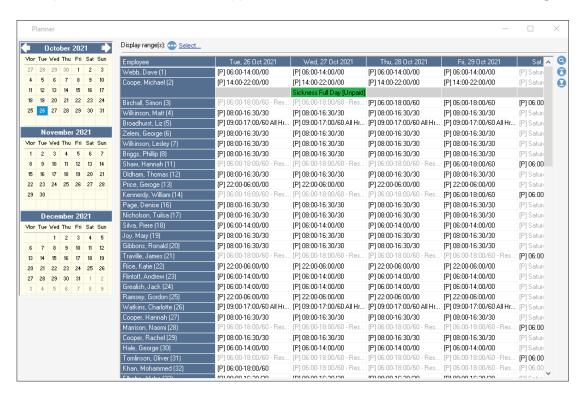


or select File, then Planner... from the menu.

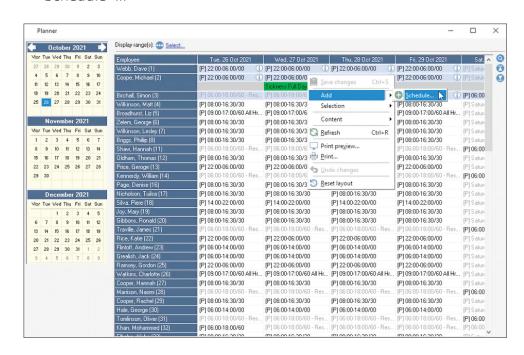




**2.** The planner screen will then appear at the same date from the users last log on.

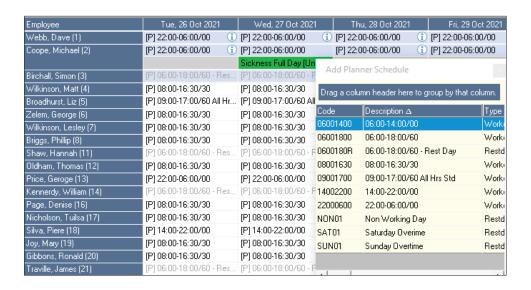


**3.** To add a daily schedule for a person, <Right-click> on the planner and select <Add>, then <Schedule>...





**4.** Next, drag the schedule, (or schedules), and drop onto the day.

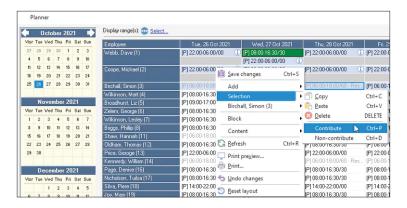


The new schedule will appear in green...

Employee	Tue, 26 Oct 2021	Wed, 27 Oct 2021
Webb, Dave (1)	[P] 22:00-06:00/00 ①	[P] 08:00-16:30/30
		[P] 22:00-06:00/00 <b>(</b>



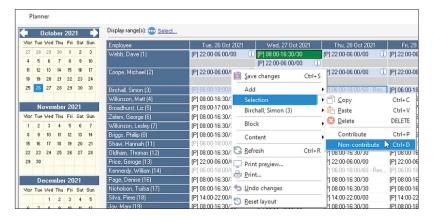
**5.** If you wish the schedule to contribute to the period overtime, Right-click on the schedule, then click Selection, then Contribute.



The schedule will then be marked with a (P) to denote 'contributes to period'.

#### [P] 08.30 - 17.30

**6.** To remove the 'contributes to period' marker, repeat the process, but this time selecting Non-contribute.



The (P) marker will disappear.

08.30 - 17.30

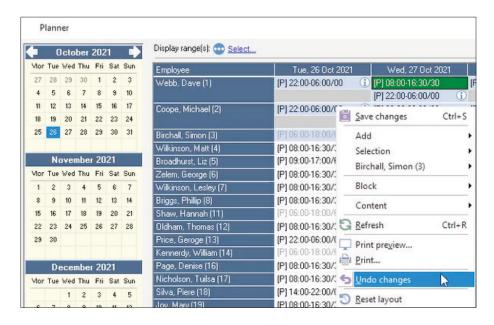
**Contribute** - This is when an employees hours contribute towards a target for the week before overtime e.g. 40:00 basic required before overtime x1.5 can be earned.

**Non-Contribute** - Any hours worked on the day including overtime will be paid at that rate at the end of the period e.g. 08:00 basic and 02:00 overtime x1.5 earned on Monday, that would pay that amount at the end of the period or week.

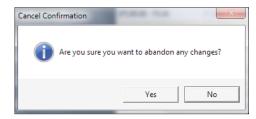




**7.** To undo the changes made during this session, <Right-click> on the planner and select Undo changes.



Confirm your intention to undo and all the schedule changes made during this session will return to the previous state.



**8.** Finally, select the exit button to leave the planner.



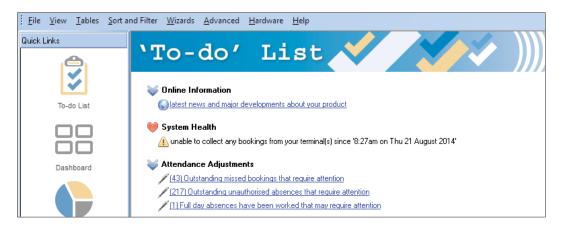


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## m/04/130 Adjustments on the 'To-Do' list

**1.** A number of 'adjustment items' may appear on your 'To-Do' List dependant on how the North Time Pro system has been configured.



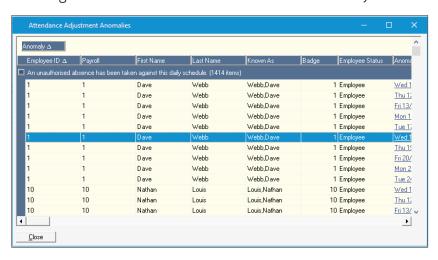
- 2. The three adjustment 'To-Do' items covered in this module are;
  - **a.** Outstanding unauthorised absences that require attention
  - **b.** Outstanding missed bookings that require attention
  - **c.** Outstanding missed bookings awaiting a decision



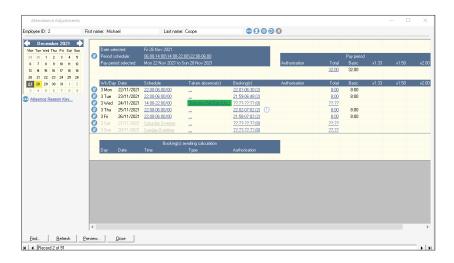
**3.** Outstanding unauthorised absences that require attention. This 'To-Do' item highlights days, (or parts of days), where a person has missed work without there being a preplanned reason for the absence.



Clicking on the 'To-Do' link takes the user to the Adjustment Anomalies screen.

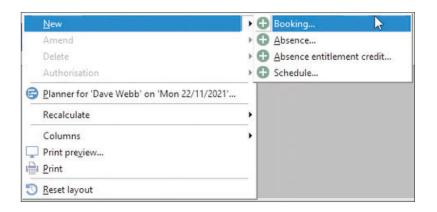


By selecting a person's Anomaly Date, the Attendance Adjustments screen will appear.





By <Right-clicking> on the highlighted date, the user can add new bookings, amend existing booking or add an absence or holiday record.



**4.** Jump to a different date by using the calendar control.

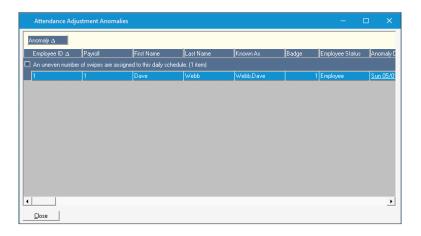




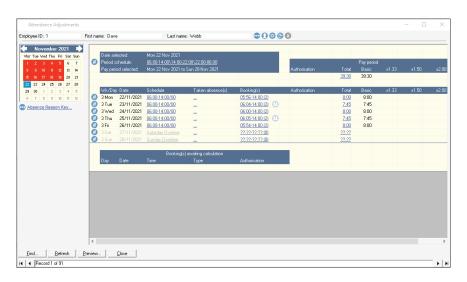
**5.** Outstanding missed bookings awaiting a decision. This 'To-Do' item highlights days, where a person has forgotten to book in or out.



Clicking on the 'To-Do' link takes the user to the Adjustment Anomalies screen.

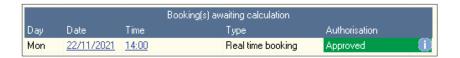


By selecting a person's Anomaly Date, the Attendance Adjustments screen will appear.

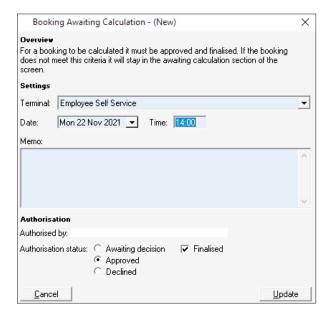




Click on one of the dates awaiting a decision.



Next, select Approve or Decline. Depending on how the North Time Pro system has been configured, it may not be possible to Finalise the booking at this stage.



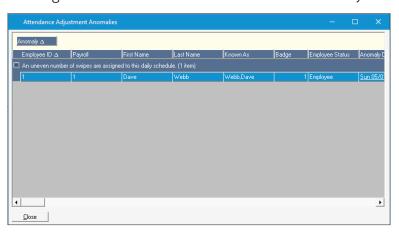
Finally click on <Update> to save the changes and return to the Attendance Adjustments screen. Selecting <Close> will return the user to return to the Adjustment Anomalies screen.



**6.** Outstanding missed bookings that require finalisation. This 'To-Do' item highlights bookings not made at a terminal that require finalisation by a manager before North Time Pro will attempt to calculate.



Clicking on the 'To-Do' link takes the user to the Adjustment Anomalies screen.

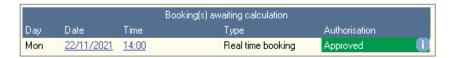


By selecting a person's Anomaly Date, the Attendance Adjustments screen will appear.

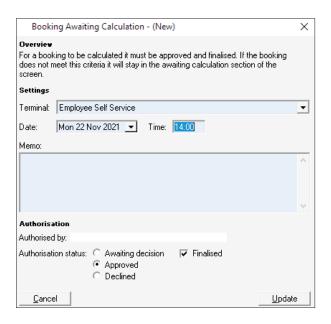




Click on one of the dates awaiting a decision.



Next, select Approve or Decline and then Finalise.



Finally click on <Update> to save the changes and return to the Attendance Adjustments screen. Selecting <Close> will return the user to return to the Adjustment Anomalies screen.






# m/04/140 static register overtime

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Overtime authorisation is required when an employee works more hours (at a certain rate), than the threshold specified in the daily schedule rate monitor.

**1.** Overtime authorisation is highlighted on the 'To-Do' screen under the static register heading.



**2.** Selecting the static register overtime authorisation link presents the user with the following screen:





**3.** Right click on the overtime you want to approve/decline, and then go to block then authorisation, the either approve or decline.

