AlarmBiller and SedonaOffice – Time & Attendance

Contents

About This Guide

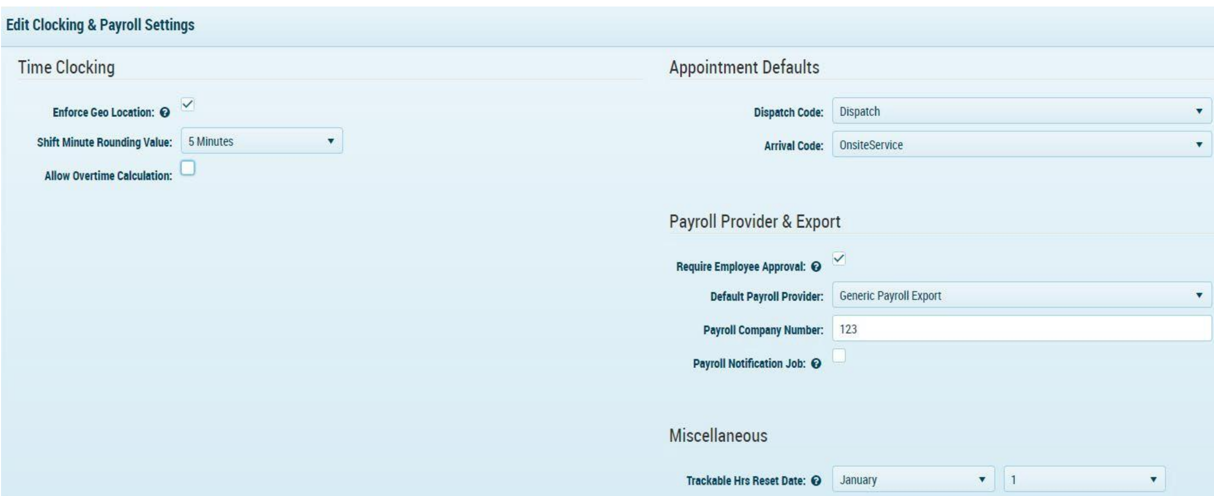
This guide is a functional overview (living document) and provides conceptual and summary operational information. This guide does not define all fields within the application; the application provides some definitions while other field names are familiar terms to those in the security industry. The assumption is that the reader is familiar with central station automation systems, as well as web services technology and terminology.

Setup

There are five main areas of setup: (1) Preferences, (2) Paygroups, (3) Paycodes, (4) Users, and (5) Employees

Preferences

This is the most generic area of the setup that should be looked at first:



Enable Geolocation: If this checkbox is checked, you will be able to see on the timesheets where each employee clocked in or out of each paycode on a google map. There is a button next to each time entry on the timesheets that will allow you to see this.

Shift Minute Rounding: This feature will change the display of the clock in and clock out time of your employees. If the ‘minute’ option is selected, your timesheets will only show whole minute values for your employees’ times of clocking in and out. If the ‘five minute’ option is selected, your timesheets will reflect only five minute increments for clocking in and clocking out despite the time your employees’ actual clock in or out time. These are rounded to the nearest five minute (ten minute, fifteen minute) increment up or down.

Overtime Calculation: If you calculate overtime with your employees, you should have the allow overtime calculation checkbox checked. You can then enter an overtime factor (1.5 = time and a half). You can also enter a double overtime factor, but this factor will only be applicable if you are calculating daily overtime or consecutive work days overtime. If overtime calculation is based on weekly hours worked, check the 'allow weekly overtime' checkbox and then enter the amount of hours needed to be worked before overtime is paid. If overtime is calculated daily, you will check the 'allow daily overtime' checkbox and then specify how many hours need to be worked in a day before overtime is paid. The hours needed to be worked before double overtime is calculated should be entered too (you will want to make sure there is a double overtime factor entered into the field above). If consecutive work days overtime needs to be calculated, check the 'allow consecutive work days overtime' checkbox. Then enter how many days need to be worked in a row for the next day to be calculated as overtime. You can then enter how many hours on the overtime day need to be clocked before double overtime is paid (you will want to make sure that there is a double overtime factor entered in the field above).

Appointment Defaults: (It is preferable that you understand paycodes before looking at this area of the preferences set up)

Dispatch Code: You will want to select the paycode that should be defaulted for technicians when they are dispatching themselves to an appointment on their schedule board.

Arrival Code: You will want to select the paycode that should be defaulted for technicians when they arrive at an appointment on their schedule board.

Payroll Provider & Export:

Require Employee Approval: If this checkbox is checked, employees will be given the option to approve their own timesheets at the end of a pay period. They are not required to approve their timesheets though, as even if there are employees who did not approve their own timesheets, this will not stop managers from being able to approve the pay period

Default Payroll Provider: This dropdown controls what the export sheet looks like when you export your payroll. If you do not see your payroll provider in this list, you will want to pick the 'generic payroll export', as this export file provides most of the information necessary for importing to other payroll providers and is a file that can be manipulated to be imported to most payroll providers. If you would like to add your payroll provider to this list, contact us and we can work together with you to add them.

Payroll Company Number: If you are using a generic payroll export, you can leave this field blank. If you are picking a specific payroll provider, you should already have a payroll company number you can place in this field.

Payroll Notification Job: If this checkbox is checked, at the end of every pay period, an email will be sent to all who need to approve payroll. Managers will always get an email, but employees will only get an email if the 'require employee approval' checkbox is checked.

Trackable Hours Reset Date: This is the date on which PTO and Vacation time reset. Usually this is your company's year-end and is often January first.

Company Preferences Tab: In this tab, you can place your company's pertinent information and add your logo.

Pay Groups

What is a paygroup?

- A paygroup is essentially just a pay period. You will want to make a different paygroup for any employees who get paid at different times or have different pay periods. Paygroups are also where approvals of payroll occur, therefore you may want to create a different paygroup for each manager that has employees under him/her and approves payroll for those employees.

Each group will have a frequency: weekly, bi-weekly, semi-monthly, monthly. Upon the creation of these paygroups, you will only specify the start date of the pay period, as it will calculate the ending date of the pay period based on the pay frequency selected. The '1st Pay Check Date' field is to specify what date employees receive their paycheck. All pay periods data will be tracked in the pay group.

You will attach employees and managers to each paygroup you create:

Employees: Each employee can only be assigned to one pay group, as they only have one pay period

Managers: Managers assigned to the Pay group have access to employee info in that pay group and can approve and export payroll. A manager can have different permissions/access to these things which can be controlled in the user settings.

Pay Codes

What is a Paycode?

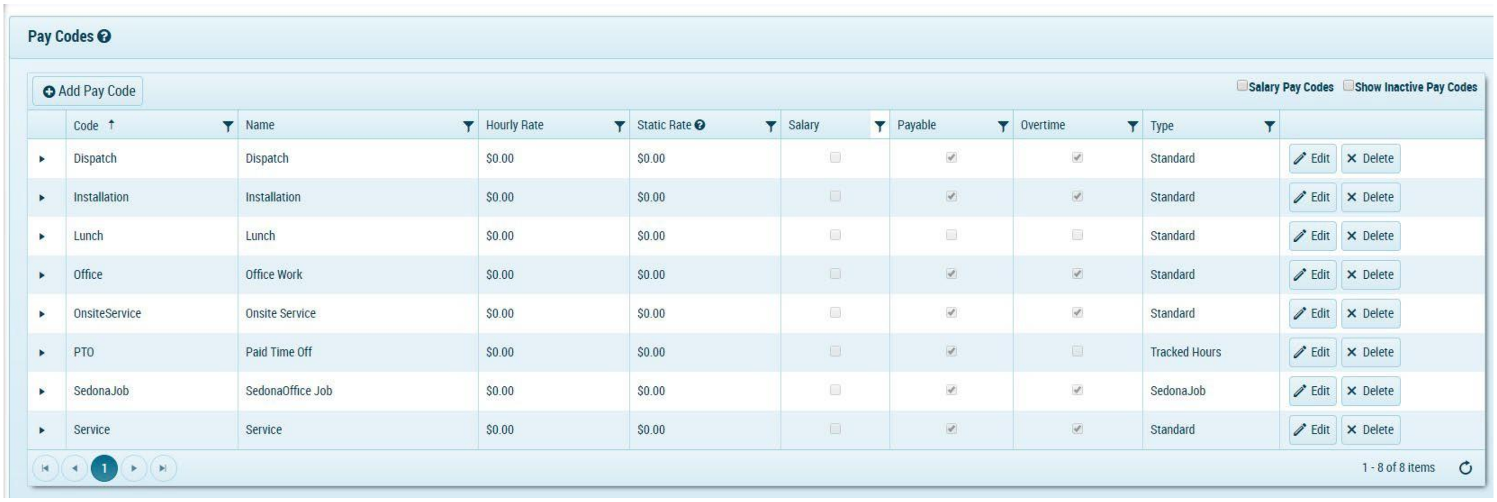
- A paycode represents what an employee is working on. Paycodes are going to provide your company some leeway as too how you set them up. It all depends on how detailed you wish your time sheet to be. The more detailed you wish to be, the more paycodes you will want to add.

Creating a Paycode

- When creating a Paycode, you will first enter the name/description of the paycode
- Next, you will enter the hourly rate of the paycode, which is the amount you will pay the employee for this task. Most likely you will leave this at $0.00 for each paycode, because if each employee gets paid differently, you will set that up when you are setting up the employee
- Static Rate will only be used by SedonaOffice users, and if that is you, look at the end of the paycodes setup to find out what this is used for
- Only check the salary box only for one paycode that will be for salary employees if you would like to track salary in Time and Attendance

- Check the payable checkbox if your employees will get paid for the paycode (most of your paycodes will have this option checked except for lunch)
- Check the overtime checkbox if the hours worked on the paycode will bring the employee closer to overtime pay
- There are three paycode types: ‘Standard’, ‘SedonaJob’, and ‘Tracked Hours’. Most every paycode will use the ‘standard’ paycode type. ‘SedonaJob’ paycodes are related to SedonaOffice users only, and is further explained at the end of the paycodes setup. The ‘tracked hours’ paycode type is used only for PTO/Vacation time. You will make a PTO/Vacation paycode with a ‘tracked hours’ type and you can then add this to your employees and setup their PTO there.

Here is a list of some example paycodes:



Pay Codes

Add Pay Code | Salary Pay Codes | Show Inactive Pay Codes

Code	Name	Hourly Rate	Static Rate	Salary	Payable	Overtime	Type	
Dispatch	Dispatch	$0.00	$0.00	☐	☑	☑	Standard	Edit Delete
Installation	Installation	$0.00	$0.00	☐	☑	☑	Standard	Edit Delete
Lunch	Lunch	$0.00	$0.00	☐	☐	☐	Standard	Edit Delete
Office	Office Work	$0.00	$0.00	☐	☑	☑	Standard	Edit Delete
OnsiteService	Onsite Service	$0.00	$0.00	☐	☑	☑	Standard	Edit Delete
PTO	Paid Time Off	$0.00	$0.00	☐	☑	☐	Tracked Hours	Edit Delete
SedonaJob	SedonaOffice Job	$0.00	$0.00	☐	☑	☑	SedonaJob	Edit Delete
Service	Service	$0.00	$0.00	☐	☑	☑	Standard	Edit Delete

1 - 8 of 8 items

SedonaJob Paycodes: This type of paycode is only used by Sedona Office users. You will want to setup Sedona Job paycodes for those employees that are clocking into Jobs that have not been scheduled.

> *Static Rate:* Only used for SedonaJob Paycodes. Used when you want a specific job costing rate rather than matching the hourly rate of time entry. This rate is pushed back to SedonaOffice.

Users

Users need to be setup before employees, as you will be linking users to employees. If you are an AlarmBiller customer, users/employees will transfer from your AlarmBiller database. If you are a SedonaOffice customer, you will have to create a user for every employee you would like to give the ability to use Time and Attendance. A user is mostly just the login information and permissions.

Permissions:

- *Pay Group Manager*: This permission allows the user the ability to approve payroll for the paygroup this employee is attached to

- *Pay Roll Export*: After payroll is approved, the ability to export the data becomes available and this permission allows the user to export that data
- *Employee Shift Edit*: Employees have the ability to edit their own shifts with this permission
- *Hide Employee Rates:* This permission is mostly for managers who are approving payroll, but you do not want to have them see the other employees pay rates

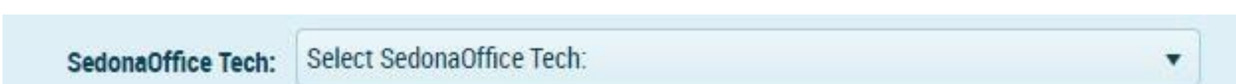
Employees

The Employee setup is the culmination of everything else we just setup. It is the final step to setting up your Time and Attendance Database. AlarmBiller customers will have their employees preloaded to their database but SedonaOffice customers will have to create an employee for each user. Both AlarmBiller and SedonaOffice customers will have to setup their employees for Time and Attendance.

There are many options for setting up your employees, but listed is what needs to be setup in order for the employee to be able to clock in:

1.) Attach your employees to their associated user with the first field in the employee setup.

2.) For SedonaOffice customers, make sure you add your employees to their respective technician.



3.) Make sure you attach your employee to their respective paygroup in the paygroup dropdown field.

4.) At the very bottom of the setup is the paycode area, where you will add the paycodes that the employee needs to be able to clock in to. Each employee can only clock into the paycodes that are assigned to him/her. **Make sure that one of the paycodes has a* ***default box checked****, as without a default your employee will not be able to clock in**

Default Hourly Paycode Rate: We originally made the point that when we are creating paycodes, we are going to leave the hourly rate at zero because most likely each employee gets paid differently. For each paycode that has a rate of zero in the employee setup, those paycodes will default to the amount setup in the employees 'Default Hourly Paycode Rate' field. If any hourly rate exist for a paycode assigned to the employee it will use that rate instead of the 'Default Hourly Paycode Rate'.

Dispatch/Arrival Defaults: Just like there is a default area for dispatch and arrival on appointments in the preferences area of the setup, there is also a default area for dispatch and arrival in the employee setup. The paycodes setup in the employee setup will take precedent over those setup in the preferences. If you leave these blank in the employee setup, the defaults setup within the preferences area of the setup will take precedent.

Salary: This is the area of the employee setup where you can set them up to be on salary. All you will have to do is check the salary box, select the salary paycode, which should already be created, and then specify the salary amount.

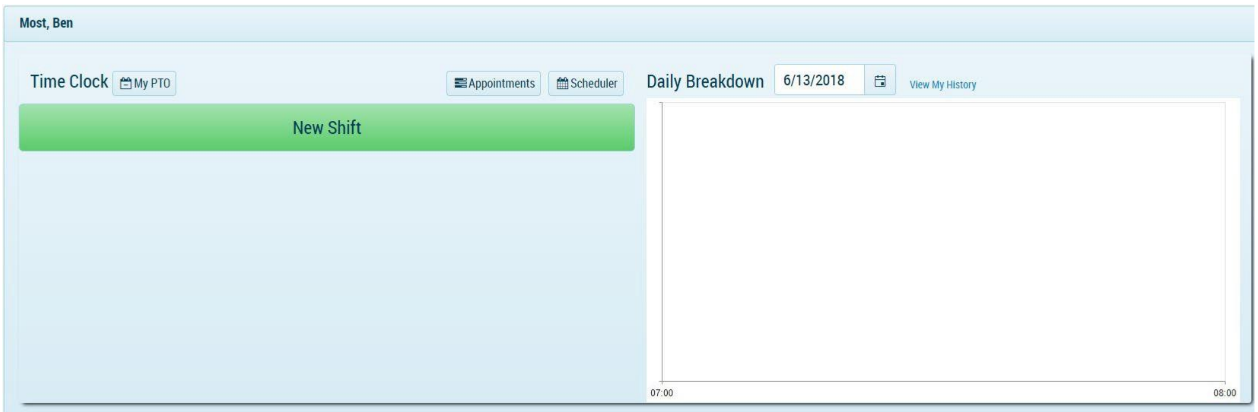
How do I add Tracked Hour or SedonaJob paycodes?

When adding paycodes, you will add them by type (Standard, SedonaJob, Tracked Hours). You can change what type of paycodes you are adding to an employee with the 'Manage PayCode Type' dropdown.

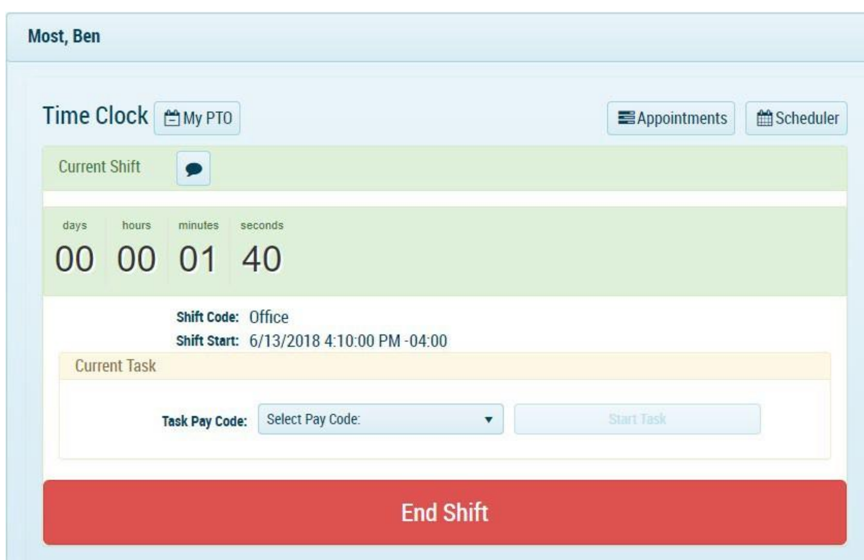
PTO Paycodes: As stated above, you will want to change your 'Manage PayCode Type' dropdown to Tracked Hours first. Then, when you add the paycode(s), you will want to specify whether this employee has fixed or accrual hours. If the employee is fixed, all you will need to do is place the amount of hours they have available to use per year in the 'Max Trackable Hours' field. If the employee is accrual, you will need to place the amount of hours they accrue per hour of work in the 'Reg Hrs Accrual Factor' field. If they accrue extra hours during overtime work, you can place how many hours are accrued per overtime hour in the 'OT Hrs Accrual Factor' field.

Using Time & Attendance

Starting a New Shift:



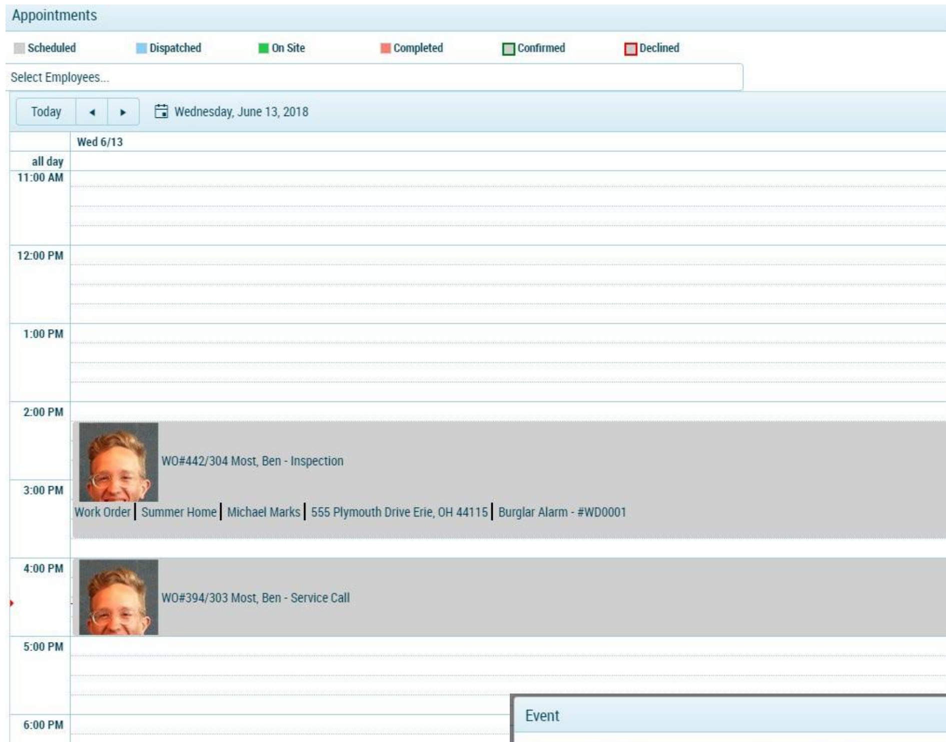
After you have finished setting up your employees, their home screen will look like the above picture. Then to start a new shift, all they will need to do is press the 'new shift' button, select a paycode for the shift, and then press the 'start shift' button. **Note: The paycode that you checked as 'default' on this employee will be the paycode that automatically shows up as the paycode to start their shift with. Usually you will default a paycode that they will be starting their day with frequently**



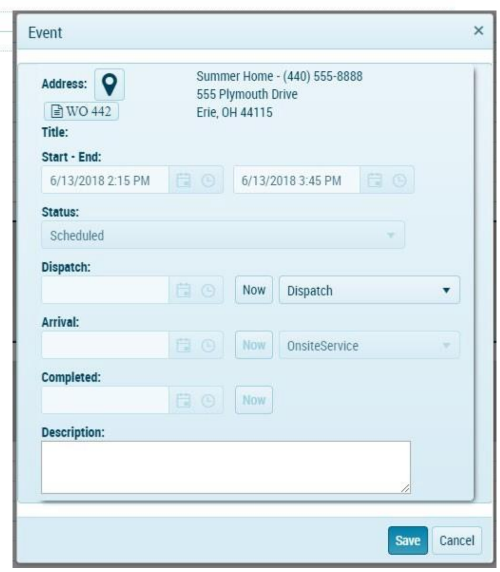
After you start your shift, you will see that time starts counting for that day's shift. The paycode that you select at the start of your shift will show up as the 'shift code' for that shift. There will be times throughout the day that you will need to change to a different paycode, as what you are working on is changing. One place to do this is with the ‘task’ functionality. All you need to do to change the paycode you’re on is to select a paycode from the task paycode dropdown and press the ‘start task’ button on the right.

Clocking into Work Orders/Tickets

In the previous two pictures, you will see an ‘appointments’ button. When you click on that button, a screen will pop up that looks similar to this:



As you can see, this screen, looks very familiar to either your calendar in AlarmBiller, or your schedule in SedonaOffice/FSU (depending on whether you are an AlarmBiller or SedonaOffice customer). Everything that you schedule in your database should populate here for your techs to be able to clock into like they regularly do. If you double click on the appointment that shows up in this screen, a task pane like this will populate:



AlarmBiller Customers:

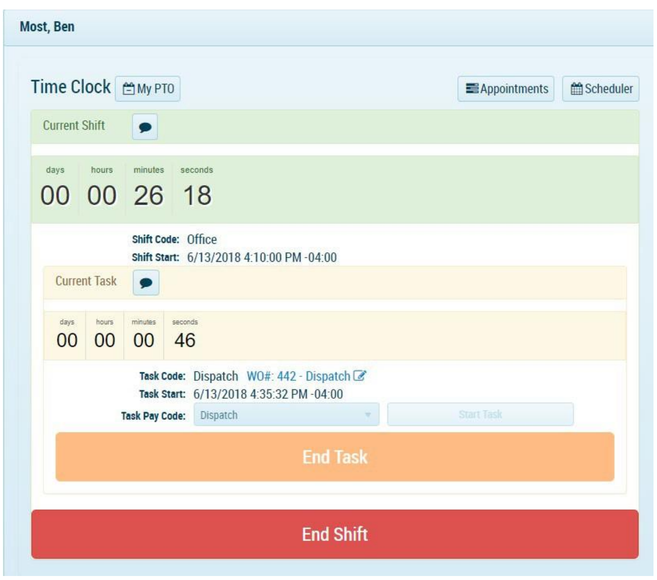
Your technicians will use this appointments screen to enter their dispatch, arrival, and completed time for their work orders. By entering their times here instead of from the calendar or the work order itself, time will be added to the work order and to the employee’s timesheet in T&A for payroll.

SedonaOffice Customers:

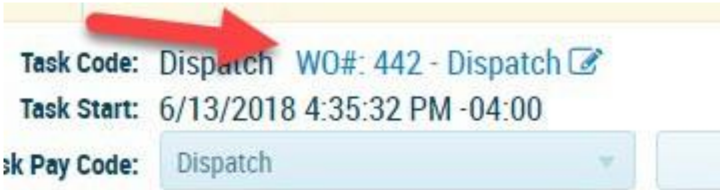
Your technicians will use this appointment screen to clock their dispatch, arrival, and completed time for any of their tickets/appointments that are scheduled. By entering their times here, not only will time be updated in SedonaOffice/FSU, but their time will also be recorded on their timesheets in T&A for payroll.

When you press the ‘now’ button next to dispatch, this will clock a dispatch time on your work order or ticket, and change the paycode that they are clocked into to the paycode that shows up to the right of the ‘now’ button. After you enter a dispatch time, this will also change the color of the appointment, indicating that a time has been entered on the appointment as shown below:

When clocked into an appointment, the home screen of Time and Attendance will look like this. The work order/ticket that you are clocked into will show up as a task:

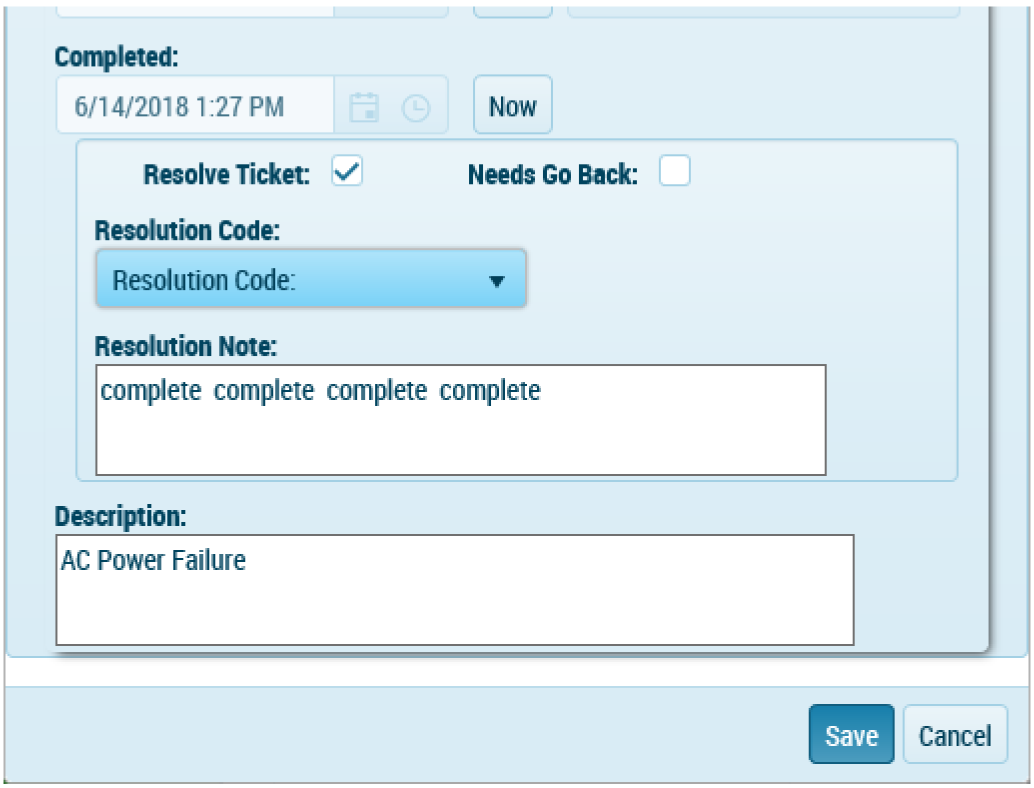


You can click on the blue link in the task code line to open up the appointment and finish placing in the ‘arrival’ or ‘completed’ time on the ticket.

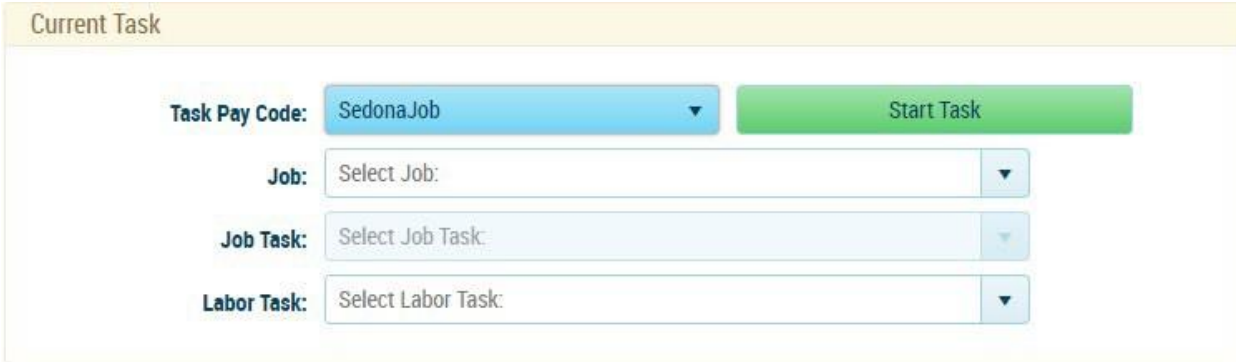


SedonaOffice Customer Extras:

Once you place a completed time in your appointment through Time and Attendance, you will then see resolution options populate that you will have to complete to complete the appointment in T&A.



If you have techs that are going to be clocking time on jobs that are not scheduled as appointments, they will have to clock into those jobs by changing their task paycode first to a SedonaJob paycode. (For more information on SedonaJob paycodes, view the paycode portion of the setup area in this document) After you select a SedonaJob paycode, you will have multiple options that will pull from your Sedona database. The job dropdown will give you a list of all the jobs from your database and job/labor task dropdowns are also being pulled from Sedona. Select something for each of these dropdowns and then press 'start task' to clock time.



Approving/Exporting Payroll

Approving and exporting your timesheets in Time and Attendance happens from the paygroups area. You will need to go to setup, then paygroups, then open up the paygroup you wish to approve, and then open up the specific pay period you wish to approve. When you open a pay period, you will get a screen that looks like this:

Pay Code	Regular Hrs	Unpaid Hrs	Overtime Hrs	2x Overtime Hrs	Rate	Regular Pay	Overtime Pay	2x Overtime Pay
PTO	3.0000	0.0000	0.0000	0.0000	20.0000	$60.00	$0.00	$0.00
Office	0.4300	0.0000	0.0000	0.0000	0.0000	$0.00	$0.00	$0.00
Dispatch	0.0700	0.0000	0.0000	0.0000	15.0000	$1.05	$0.00	$0.00
PayPeriod Totals:	**Total: 3.5000**	**Total: 0.0000**	**Total: 0.0000**	**Total: 0.0000**		**Total: $61.05**	**Total: $0.00**	**Total: $0.00**

You will see that there are four different tabs that show up. These four different tabs all provide information about the data that was entered that payperiod, just in different views.

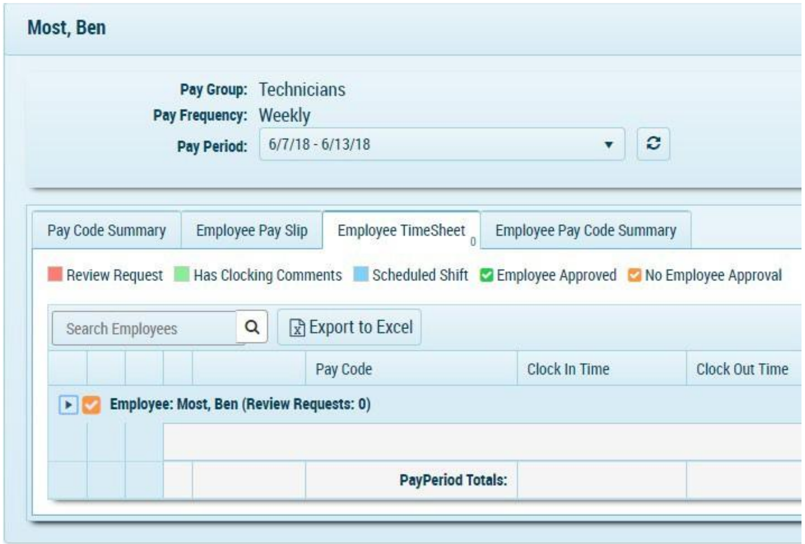
Paycode Summary: This view of the data will show you at a glance the totals for all employees time entered by paycode

Employee Pay Slip: This view shows you the hours/rate totals of each employee during this payperiod

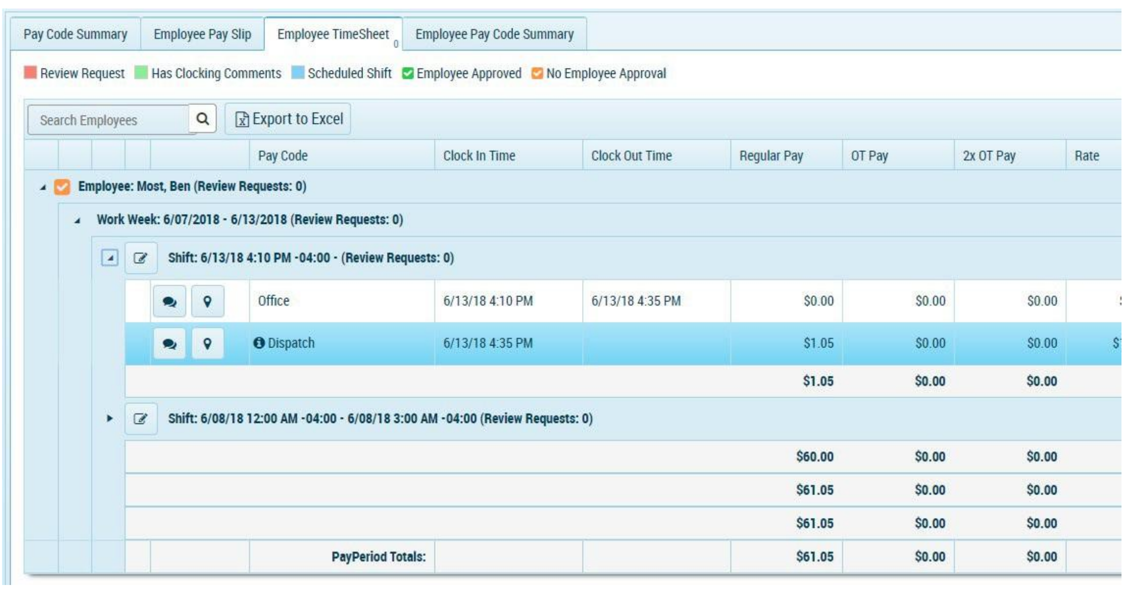
Employee Timesheet: This view shows you each employee's shifts by week, day, and paycode

Employee Paycode Summary: Gives you a total paycode summary for the payperiod by employee

Click on the black arrow to the left of each employee in the Employee Timesheet tab to drill into their data during that pay period

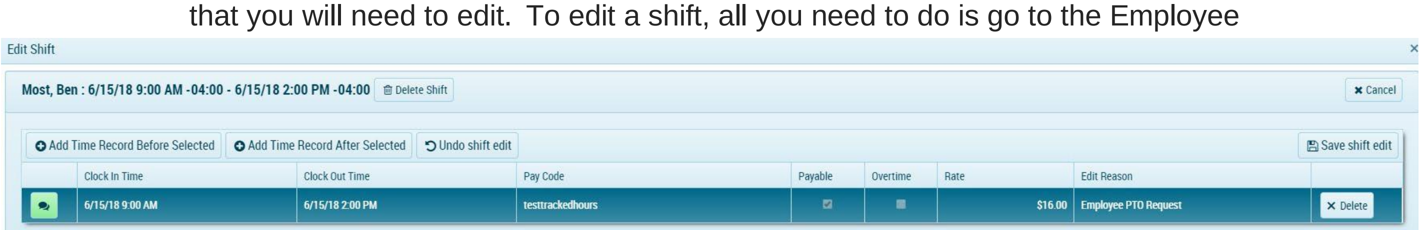


You can view the employees' individual shifts by drilling far enough into each of them.



Editing/Adding Shifts

When you are looking through your payroll to approve it, there will inevitably be shifts that you will need to edit. To edit a shift, all you need to do is go to the Employee

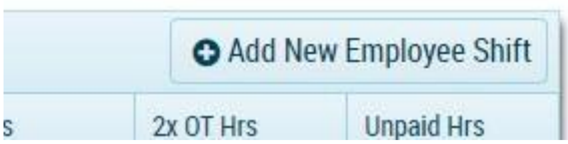


Timesheet tab, drill into the specific employee to find the shift that you need to edit, and then press the pencil button to the left of the shift. An edit screen will come up that looks like this:

If you click into the 'Clock In Time', 'Clock Out Time', or 'Paycode' fields, you can change what is populated there. You can also hit the 'Add Time Record Before Selected' or 'Add Time Record After Selected' button to add time records to this shift. **Every time record that you edit, you need to add an edit reason on the right of that time record before you save the shift edit*

The 'Delete Shift' button in the upper right will delete that employee's shift entirely

You can also add a shift for an employee by hitting the 'Add New Employee Shift' button

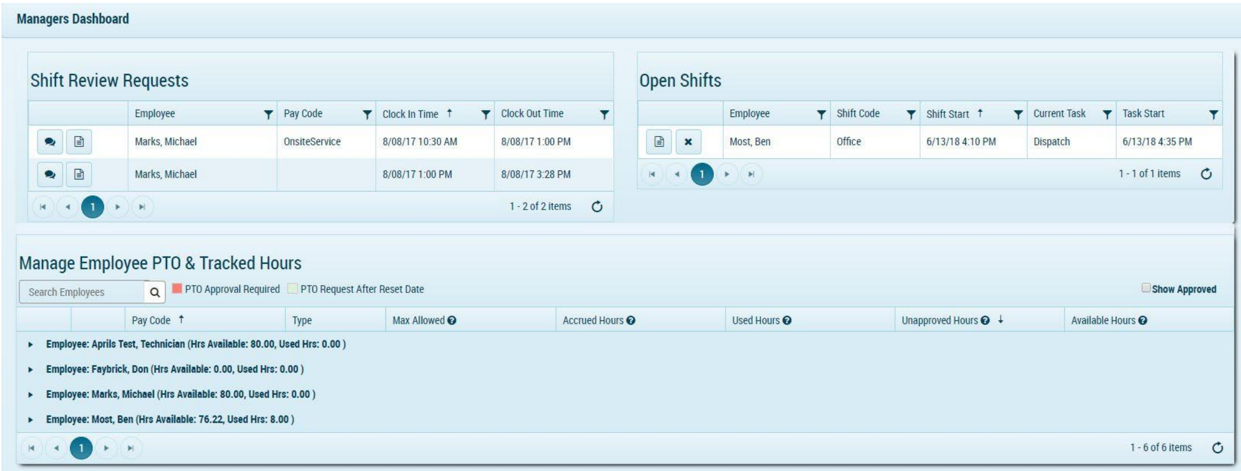


Editing Tip: When editing shifts with multiple time records, you need to make sure that you are keeping the time records congruent. The clock out time of a time record must equal the clock in time of the subsequent time record. If you edit a shift and you're having trouble saving the edit, be sure to check that all the time records are congruent.

After you have finished looking over the times for the pay period you are approving, just hit the green 'Approve Payroll' button in the upper left

After you hit the 'Approve Payroll' button, you will then get have the ability to export your payroll into the export file type that you have selected in the preferences area of the setup. (See Preferences area of this document)

Manager Dashboard



Shift Review Requests

When in the ‘Employee Timesheet’ tab of a paygroup and you’re drilled into specific shifts for employees, you will notice a speech bubble button to the left of each time record. When on the home screen, employees can click on the ‘view my history’ link to view the time that has been recorded for them. When viewing their own time, if they see something that needs to be changed, they can click on the speech bubble button to put in a review request specifying what the issue is with their shift. All the review requests made by employees will show up in this area so that managers can easily access all edits that need to be made. Press the speech bubble button to the left of the review request to see the request. You can then press the page button to the right of the request to be taken directly to their timesheet to make the edit.

Open Shifts

This area shows all the employees that are currently clocked in.

Manage Employee PTO & Tracked Hours

On the home screen, there is a button in the upper right labeled ‘My PTO’. When an employee hits this button, he or she will have the ability to add a request for the tracked hour paycodes that they have attached to them. All of the requests that they create will show up in this area for a manager to look at and approve or delete.