

## New Employee Group TimeTracker Setup Checklist

TimeTracker Setup windows must be setup in a specific order. The following checklist is provided for assistance to step the user through the proper setup process so they are successful using the setup windows. Setup windows are also used to maintain data ongoing. **Note:** *The print proofing icon is available in most windows for printing out a list if desired.* Black font = HR; green = SMART eR; red= regional setup

- **Setup Supervisors**
  - Setup supervisors for the SMART eR approval process for TimeOff Requests or Hours. A person who is not in the approval process does not need to be built here (Example: payroll users).
  - Verify email addresses are entered in **Payroll | Employee Setup | Employee Info**
  - *Optional:* Setup anyone that needs to be able to edit for a location, but not approve.
  - Email [SHRSupport@regionv.k12.mn.us](mailto:SHRSupport@regionv.k12.mn.us) to request user access for new supervisors/editors. All access options are found on page 5 of this checklist.
  
- **Setup TimeTracker Pay Codes** – When you open this window when setting up a new employee group the window will only show active TimeTracker pay codes.
  - Check the Show Inactive codes box to see all codes. Mark the active box on any inactive codes that are needed for the new group.
  - Verify the display descriptions make sense in the context of what employees would choose from in SMART eR. **The descriptions need to be uniquely named, but a pay code can be used more than once as long as it does not need a unit conversion done.**
  - Set up overtime options and pay codes.
  - *Optional items for consideration:*
    - *Are auto hours going to be used?*
    - *Are segment minimums going to be used?*
    - *Will you require notes?*
  
- *Optional: **TimeTracker Hours to Units Conversion***
  - *Build conversion tables for each pay code that needs to have hours converted into units. For example: Subs might have a code split into: 0-4 hrs= .5 unit, 4-6 hrs = .75 and 6-8 = 1. If the pay code is not paid in unit pay, it does not need to be setup.*
  
- *Optional: **Setup Auto Break Rules***
  - *Setup the different automatic break options that will be available districtwide.*

- *If you made new paycodes active and they are eligible for an autobreak that was already created you need to go into the Setup Auto Break Rules window and mark those paycodes as eligible for that break.*
- *Optional: TimeOff Request process in SMART eR.*
  - **Setup TimeOff Plans** – *Complete TimeTracker Setup fields if being used.*
    - *Plans may already be set up if they were used for a group already set up in Timetracker*
  - **Setup TimeOff Reasons**
    - *Uncheck TimeTracker Visible checkbox for any TimeOff Reasons that should not come into TimeTracker.*
    - *Check the TimeTracker Limit checkbox if TimeOff reason limits should be applied in SMART eR.*
    - *Proof codes in the **TimeOff Setup | TimeOff Reasons** report.*
- **Setup TimeTracker TimeOff Codes** – *This window works similarly to the Setup TimeTracker Pay Codes. It may be helpful to filter by TimeOff Reason to set up codes.*
  - *Mark any codes not needed in TimeTracker as inactive.*
  - *Verify the display descriptions make sense in the context of what employees would choose from in SMART eR. **The descriptions need to be uniquely named, but the same plan/reason combination can be used multiple times.***
  - *Determine if Emp Display Description is going to generate a timecard entry.*
    - *Choose pay code*
    - *Optional: Setup overtime option*
  - *If the same Plan/Reason combination is used by both contract and hourly staff, you must create 2 rows with different employee display descriptions. **Example:** Leave without Pay and Leave without Pay Hourly – Both are Plan = MISC and Reason = LWP. The Leave without Pay Hourly code would have “Generate TC” checked and a pay code entered (pay code can be overridden on employee group or employee).*
  - **Optional proofing report: TimeTracker TimeOff Setup** – *Verify setup.*
- **TimeTracker Hours to Units Conversion** - *Build conversion tables for each days unit TimeOff Plan that needs to have hours converted into days.*
- *Optional: Is Schedule information going to be used anywhere?*
  - **Setup Schedules** – *Setup default schedules that can be used districtwide.*

- *Should daily time automatically be split among pay codes or will the employees have to clock in and out of each pay code?*
- *Should clock in/out times be rounded to the employee's scheduled time?*
- *If using annualized pay, do schedule exceptions need to be created for certain schedules? Reminder that schedule segments need to be consecutive for this to work.*
- **Optional proofing report: Schedules** – Verify setup.
  
- **Setup Employee Groups**
  - Determine which groups of employees will be built. It could be based on their job, location or hours they work. **Example:** *Teacher could be a group; then it can be assigned to the Elementary, Middle and High school to allow for different supervisors in those buildings.*
  - Determine which settings will be used in SMART eR.
  - *Optional items for consideration: Additional clock option setup*
    - *If using annualized pay, do schedule exceptions need to be created for the group?*
    - *Split Schedule? Setup early restrictions?*
    - *Setup rounding options. schedule rounding*
  - **Optional Proofing Report: Employee Groups**– Verify setup.
  
- **Optional: Setup TimeTracker Calendar**
  - *If holidays should be automatically generated by the system, they need to be built for the employee groups that should receive them.*
  - **Setup Employee Groups** – *Assign the calendar built to the employee groups that the calendar applies to. If the person is not part of a group, or needs different information, override the row and enter the 3 fields under Holiday pay.*
  
- **Setup TimeTracker Locations**
  - Does a supervisor assigned to a group change for a specific location? Routing to supervisors in SMART eR will be based on if an employee has a group assigned. **Example:** *Teacher could be a group; then it can be assigned to the Elementary, Middle and High school to allow for different approvers in those buildings.*
    - If no:
      - Minimum of one districtwide location, or default of ALL needs to be setup.
      - Mark other locations as inactive.

- If yes: Setup Location/Group rows as needed.
- Determine levels of approval needed. Do the approvals need to happen in a specific order?
- *Optional items for consideration:*
  - *Does anyone need to be able to edit for a location, but not approve? IE: Secretary changing someone's time or vacation request?*
  - *Do IP Address Restrictions apply for the location and group to clock in/out?*
  - *Do employees need to approve their time?*
    - *If yes, does the employee need to approve their time before their supervisor(s)?*
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- **TimeTracker | TimeTracker Setup | Mass Assign Employee Groups**
  - Assign employee groups to employees.
  - To proof employees that are missing an employee group, use the **Employee List by Group** report.
- **Setup Employee Group Details**
  - Assign default pay codes for each group.
    - *Optional: Do subs need to choose from a list of who they are subbing for when they punch in or enter a timesheet?*
  - *Optional items for consideration:*
    - **Only needed for TimeOff requests:** Assign default TimeOff codes if they apply.
    - *If using schedules, assign default schedule for each group.*
    - *Assign default automatic break rules for each group.*
  - **Employee TimeTracker Settings** – Change individual people or look at a person's setting information. **Note:** *If an employee is NOT assigned to an employee group, their information must be entered here as an override.*
    - *If not using groups it is important to check the override check box on the tab otherwise settings will not save.*
- Proof information entered to make sure it is correct.
  - *Optional item for consideration: **Employee Schedules** – Lists employees assigned to a default schedule as well as a section for individual overrides. Schedules are not optional if using the split schedule, schedule exceptions, early clock restrictions, or schedule rounding features.*

- *These reports will show group settings and employee overrides to them in bold. To see overridden employees, use the retrieval argument show overrides only = Y.*
  - **Employee Group Overrides** –Lists the employee group details per employee.
  - **Employee Location Overrides** - Lists the location details per employee.
  - **Employee Group-Pay Code Overrides** - Lists the employee group – pay code details per employee. If a pay code is missing from the employee, it will show as missing.
  - *Optional unless using TimeOff requests:* **Employee Group-TimeOff Code Overrides** – Lists the employee group – leave code details per employee. If a TimeOff code is missing from the employee it will show as missing.
  
- **Setup SMART eR access rights (Region | All | Setup SMART eR Roles)**
  - *SMART eR roles drive what a supervisor can see there.*
    - **TT\_Edit** - full editing, but not approval rights (filtered to Editor ID)
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    - **TT\_Edit\_Hours**- full editing, but not approval rights (filtered to Editor ID)
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    - **TT\_Edit\_TimeOff**- full editing, but not approval rights (filtered to Editor ID)
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    - **TT\_Approver\_Hrs** – *full approval for Hours Segments, edit/delete rights filtered to my employees*
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    - **TT\_Approver\_TO** – *full approval for TimeOff Requests, edit/delete rights filtered to my employees*
    - **TT\_Approver** – *full approval, edit/delete rights filtered to my employees*
    - **TT\_Admin** – *full access like PAYROLL, but no Process Period page*
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    - **PAYROLL** – *full rights to everyone, no filtering on employees (can then approve missing supervisor rows)*
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    - **V\_TT\_TimeOff** – *can only view the TimeOff Request -Supervisor calendar, but cannot change any of the information.*



### **SMART eR TimeTracker pages**

*These pages should be spot checked to make sure appropriate information is displaying correctly.*

- **Web Clock outside of eR/Inside eR-** *Employees get clock in and out buttons.*

**My Requests | View Hours** – *employees will access their time, schedule (if using), and Timesheets here.*

- **View Hours - Supervisor** – *Supervisor will review all items related to employee hours here. Are they seeing their people?*
- **My Requests | TimeOff Request** – *Employee will enter a TimeOff Request here.*
  - **View TimeOff Request – Supervisor**– *Supervisor will review all items related to employee TimeOff Requests here. Does the Supervisor see correct employees listed in the Add New option?*
- **Setup Proxies** - *Employees with access rights of Payroll, TT\_Admin, TT\_Approver have access to this page to setup temporary proxies for their employees.*