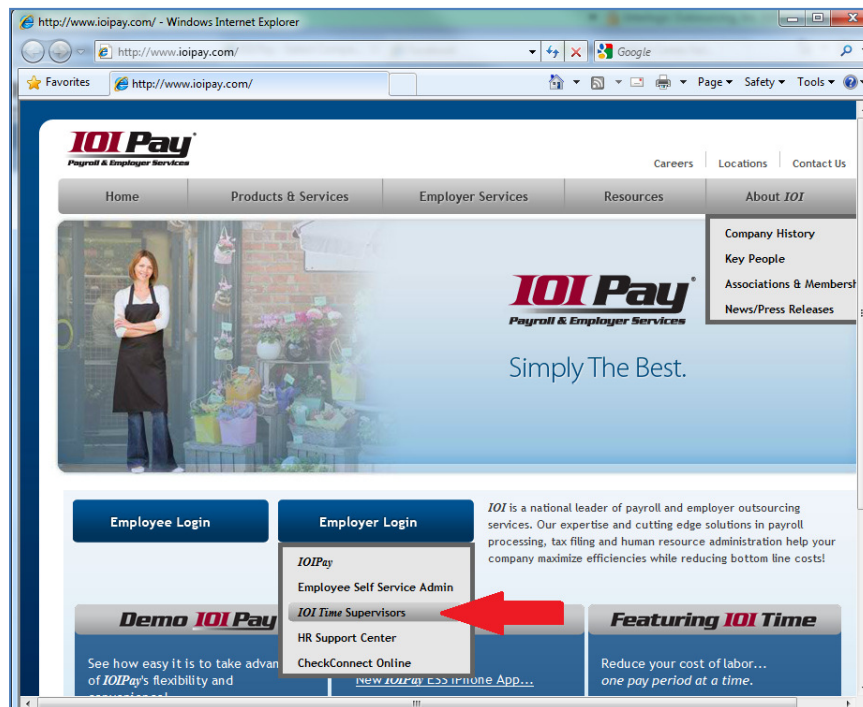


Online Time and Attendance Supervisor Access

Logging In

Supervisors can access *IOI Time* via our main website: www.ioipay.com and will access the timekeeping system through the Employer Login button. Select "IOI Time Supervisors" from the drop down menu.



The Timekeeping Customer Login screen will appear allowing you to key your Login ID and Password.

A screenshot of the IOI Pay Timekeeping Customer Login screen. The header features the IOI Pay logo and contact information: 'Payroll & Employer Services' and 'www.ioipay.com • (888) 697-0021'. The main heading is 'Timekeeping Customer Login'. Below this, there are two input fields: 'Enter Your Login ID:' with the text 'charleston' entered, and 'Enter Your Password:' with a masked password of ten dots. A red arrow points to the 'Log In' button. Below the password field, there is a link for 'Forgot your password?'. At the bottom, a yellow box contains the text: 'For a free demo, log in with the following: ID: ONLINE Password: DEMO'.

Upon logging in, the Welcome Dashboard appears and presents you with many useful tools. The Quick Stats and Quick Links help to quickly navigate to commonly used. The left hand navigation contains Main Menu, Maintenance, Reports and Settings menus for ease of use.

The screenshot shows the 'Welcome Dashboard' for the 'Diocese of Charleston - Chancery'. The left-hand navigation menu includes 'Online Timekeeping', 'MAIN MENU' (with sub-items: Home - Dashboard, Time Off Requests (0), Employee Setup), 'Time Cards' (with sub-items: Yesterday's Entries, Today's Entries, Current Period - Start: 2/2, Previous Period - End: 2/1, Select Other Periods), 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. Below the navigation is 'HELP & SUPPORT' with links for 'Terms of Use' and 'Help'. The main content area features a 'Welcome Dashboard' header, a clock icon, a welcome message, 'Quick Stats' (Total Employees Clocked In: 0, Total Active Employees: 106, Time Off Requests: 0, Total Missing Punches: 0, Total Unmatched Punches: 0), and 'Quick Links' categorized into 'Getting Started' (Add a new employee, Update Personal Information), 'Daily' (Correct Missing Punches, Assign Unmatched Punches, Review Yesterday's Punches), 'Each Pay Period' (Edit time cards for Current pay period, Edit time cards for Prior pay period, Run the Summary Report), and 'Optional' (View account settings).

Time Off Requests

This section allows you the ability to approve or reject time off requests submitted by employees. Once you approve or reject a request, an email will be sent to the employee informing them of their pending request.

If approved, the system will automatically block off the requested time on the employees time card.

An employee specific report can be run with a date range to track time off requests and time taken. You will be able to access this report under the Reports Menu within the left hand navigation.

Time Off Requests												
<p>This is a list of pending time off requests that you can approve or reject. The number in Total Hours is the number of hours the employee has requested (separated by day if time has been requested off on multiple days). When you approve a request, you can change the number of hours if needed.</p> <p>Time Off Request Report (Audit Log)</p>												
Request Number	Request Date	Code	Employee Name	Category	Requested Start Date	Requested End Date	From	To	Total Hours	Comments	Approve Request	Reject Request
1	1/25/2013 1:18:35 PM	987	Bowser, Susan	Sick	1/28/2013	1/28/2013	-	-	8	Day off		
2	1/28/2013 10:57:32 AM	987	Bowser, Susan	Vacation	1/31/2013	1/31/2013	-	-	8	vacation day		

Employee Setup

Employee Setup allows you to make changes on existing employees, add new employees and customize your employee list view.

Employee Setup

Use this page to add an employee, or edit one or multiple employees.

- Click an employee's name to edit that employee or check one or more checkboxes to select multiple employees to edit.
- Use the employee list filter to filter the visible list of employees.
- Use the Choose Field drop down in conjunction with the Choose Action drop down to customize which fields you see and in what order they appear.

Click to show the employee list filter

Work with selected employees Choose Field Choose Action

<input checked="" type="checkbox"/>	Employee Name (add new)	Card Numbers
<input type="checkbox"/>	Bowser, Susan	sbowser,123
<input type="checkbox"/>	Moth, John	654
<input type="checkbox"/>	Fox, Eileen	456
<input type="checkbox"/>	McKay, Paula	321
<input type="checkbox"/>	Jones, Brian	789
<input type="checkbox"/>	Frazier, Beejal	brazier
<input type="checkbox"/>	Smith, Jane	janesmith
<input type="checkbox"/>	Talley, Misti	mtalley

8 employees shown

Work with selected employees

To customize your employee list view, select a field from the "Choose Field" drop down and then choose the action from the "Choose Action" drop down.

Your employees will be listed in alphabetic order. You have the ability to view the list in ascending or descending order by clicking on the arrows to the far right of the column header.

Existing Employees

To work with a specific employee, click on the employees name which acts as a hyperlink to their employee set up screen. The screen will refresh providing you with the employee setup.

The screenshot displays the 'Employee Setup' page for 'Interlogic Outsourcing Glue Demo'. The page is divided into several sections:

- Identity** (with an 'Edit' button):
 - Employee Code: 987
 - First Name: Susan
 - Middle Name: (empty)
 - Last Name: Bowser
 - Designation: (empty)
 - Phone: (empty)
 - E-mail: susan.bowser@test.com
 - Start Date: (empty)
 - Separation Date: (empty)
 - Export Block: Not blocked
 - Web Clock Enabled: Yes
- Identifiers for punching the clock (card numbers, Web logins, PINs)** (with an 'Edit' button):
 - Logins / Numbers: sbowser | 123
 - Self-service password: Password has been set and changed by employee
- Employee Data** (with 'Expand History' and 'Edit' buttons):
 - Title: (empty)
 - Department: CEMHC
 - Location: (empty)
 - Supervisor: Supervisor A
 - Home 1: Salary
 - Home 2: (empty)
 - Home 3: (empty)
 - AutoLunch Threshold (hrs): (empty)
 - AutoLunch Deduct (mins): (empty)
 - Accrual Factor: (empty)
 - Schedule: (empty)

At the bottom of the Employee Data section, there is a button labeled 'Return to list of employees'.

Once an employee has been chosen the screen will display their settings. To edit an existing employee, click on the edit button at the top of each section. This will open the section to allow edits and track history. Not all of the fields will need to be populated, listed below are the fields that are required.

Identity

- Employee Code (This field is the equivalent to the Employee Number in *IOIPay*)
- First Name
- Last Name
- E-mail (Employees can populate this field within their Time Card – Personal Information)
- Separation Date (When populated this will remove an active employee from the listing, making the employee inactive)
- Export Block (Default – Not blocked)
- Web Clock Enabled (Default – Yes)

Identifiers for punching the clock

- Logins/Numbers (This will contain the employees login information)
- Self-service password (This will show if a password has been set or changed)

Employee Data

- Department
- Supervisor
- Home 1 (Indicates whether an employee is hourly or salary)

At any time you would like to view history of changes click on the "Expand History" button.

To return to the list of employees click on the "Return to list of employees" button at the bottom of the screen.

Add New Employee

To add a new employee, return to the employee listing and click on "add new". The screen will display the Employee Setup screen. Complete the required fields as listed above. The newly added employee will be listed in your employee listing.

Click to show the employee list filter

Work with selected employees Choose Field Choose Action

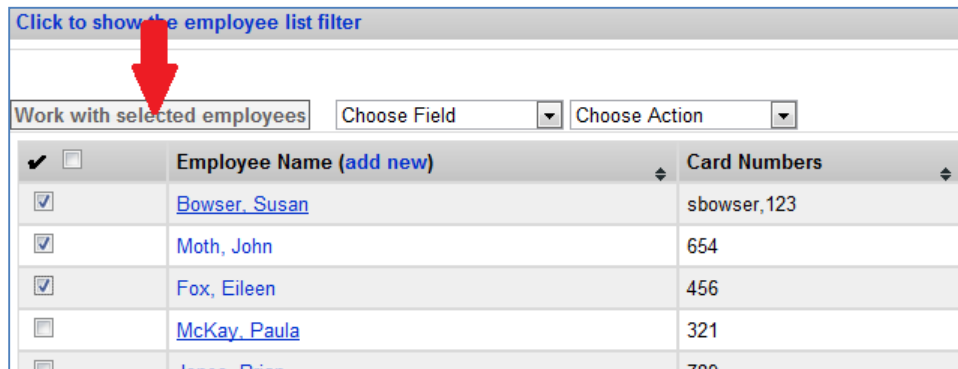
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Employee Name (add new)	Card Numbers
<input type="checkbox"/>		Bowser, Susan	sbowser, 123
<input type="checkbox"/>		Moth, John	654
<input type="checkbox"/>		Fox, Eileen	456
<input type="checkbox"/>		McKay, Paula	321
<input type="checkbox"/>		Jones, Brian	789
<input type="checkbox"/>		Frazier, Beejal	bfrazier
<input type="checkbox"/>		Smith, Jane	janesmith
<input type="checkbox"/>		Talley, Misti	mtalley

8 employees shown

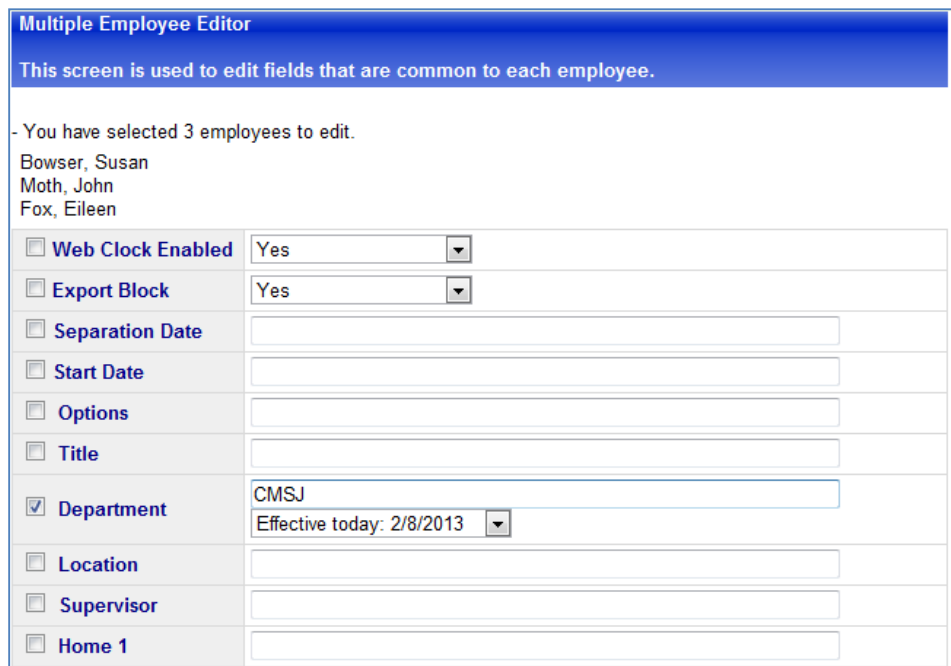
Work with selected employees

Work With Selected Employees

The system allows you the ability to work with selected employees by placing check marks next to the employee names and clicking on the "Work with selected employees" button. This allows you to do bulk changes to the employees chosen.



Click to show the employee list filter		
Work with selected employees		
	Choose Field	Choose Action
<input checked="" type="checkbox"/>	Employee Name (add new)	Card Numbers
<input checked="" type="checkbox"/>	Bowser, Susan	sbowser, 123
<input checked="" type="checkbox"/>	Moth, John	654
<input checked="" type="checkbox"/>	Fox, Eileen	456
<input type="checkbox"/>	McKay, Paula	321
<input type="checkbox"/>	Lopez, Brian	789



Multiple Employee Editor

This screen is used to edit fields that are common to each employee.

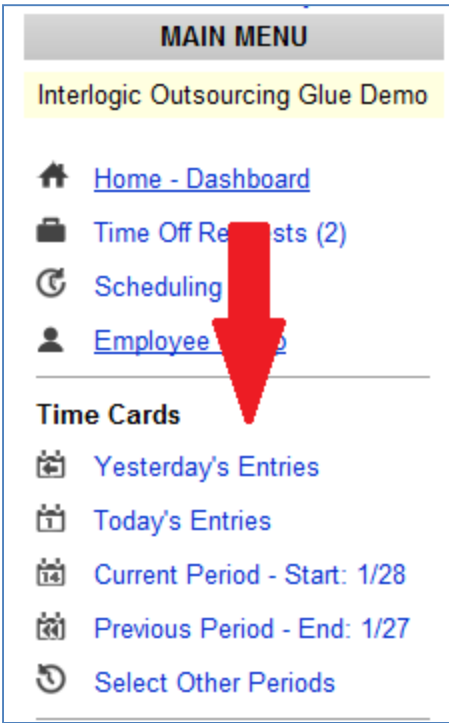
- You have selected 3 employees to edit.
Bowser, Susan
Moth, John
Fox, Eileen

<input type="checkbox"/> Web Clock Enabled	Yes
<input type="checkbox"/> Export Block	Yes
<input type="checkbox"/> Separation Date	
<input type="checkbox"/> Start Date	
<input type="checkbox"/> Options	
<input type="checkbox"/> Title	
<input checked="" type="checkbox"/> Department	CMSJ Effective today: 2/8/2013
<input type="checkbox"/> Location	
<input type="checkbox"/> Supervisor	
<input type="checkbox"/> Home 1	

Once saved, a message will appear confirming that the changes have been saved successfully. Click "OK" to the message.

Time Card Management

There are multiple views to use to edit employees time cards. You can look at a time card for a single day using "Yesterday's Entries" or "Today's Entries", or entire pay period using "Current Period" and "Previous Period". The system will even allow you to select additional pay periods and define a date range using the "Select Other Periods" option on the left hand navigation.

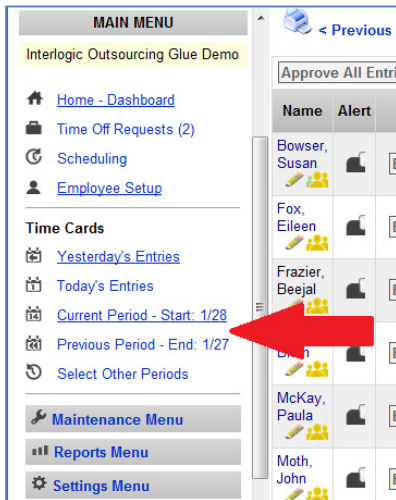


Yesterday/Today's Entries

Using either of these screen options allows you to view all of your employees recorded hours and approvals. As management you will have the ability to edit/add punches for your employees. You can also add notes and approve selected employees or approve all entries.

Current Period/Previous Period

The Time Cards section on the left hand navigation gives you the option of either working with "current period" or "previous period" employee time cards. You also are able to "select other periods" if necessary.



To work with the current period time cards simply click on the "Current Period" hyperlink on the left hand navigation which will then update with the left hand with a summary list of your employees. This view offers a quick-glance reference of your employees, if there are any missing punches (M), how many edits have been made for each employee (E) and approval levels (A).

Clock Activity

1/28/2013 - 2/10/2013

Pay Period Finder:

[\(Back to Main Menu\)](#)

Search:

Employee	M	E	A
Bowser, Susan	0	12	
Fox, Eileen	0	3	
Frazier, Beejal	0	0	
Jones, Brian	0	3	
McKay, Paula	0	3	
Moth, John	0	3	
Smith, Jane	0	0	
Talley, Misti	0	2	

Unmatched Punches (0)

Total employees listed: (8)

To work with a specific employee, click on their name from the left hand navigation and the employee's time card will then be presented in the center portion of the screen. This allows you to edit/add punches for your employees add notes, approve selected entries or approve all entries.

Online Timekeeping

Clock Activity

1/28/2013 - 2/10/2013

Pay Period Finder:

[\(Back to Main Menu\)](#)

Search:

Employee	M	E	A
Bowser, Susan	0	12	
Fox, Eileen	0	3	
Frazier, Beejal	0	0	
Jones, Brian	0	3	
McKay, Paula	0	3	
Moth, John	0	3	
Smith, Jane	0	0	
Talley, Misti	0	2	

Unmatched Punches (0)

Total employees listed: (8)

Print All Time Cards

Alphabetically

Department

Location

Choose another period

View First Name First

View by number

[Back to Main Menu](#)

Time Card - Susan Bowser

Bowser, Susan Code: 987 Interlogic Outsourcing Glue Demo
1/28/2013 thru 2/10/2013

[< Previous Pay Period](#) | [Next Pay Period >](#) | Pay Period Finder:

[Approve All Entries](#)
[Show Scheduling Information](#)
[Show Only Missing Punches](#)

Date	Alert	Edit	In	Out	Break	Category	Hours	Hrs/day	Amount
Mon 1/28		Edit Add	8:47a	1:55p	-		5.13	5.13	
Tue 1/29		Edit Add	8:51a	12:00p	-		3.15	↓	
		Edit Add	12:13p	7:00p	-0.50		6.27	9.42	
Will have to leave early for the next two weeks.									
Wed 1/30		Edit Add	8:44a	5:15p	-0.50		8.00	8.00	
Thu 1/31		Edit Add	-	-	-		12.00	12.00	
Fri 2/1		Edit Add	-	-	-		8.00	8.00	
Sat 2/2		Add	-	-	-		-	-	
Sun 2/3		Add	-	-	-		-	-	
Total hours clocked for week of 1/28 to 2/3: 42.55									
Mon 2/4		Edit Add	11:38a	7:00p	-0.50		6.86	6.86	
Tue 2/5		Edit Add	-	-	-		12.00	12.00	
Wed 2/6		Edit Add	-	-	-		8.00	8.00	
Thu 2/7		Edit Add	-	-	-		8.00	8.00	
Fri 2/8		Edit Add	-	-	-		8.00	8.00	

Payroll & Employer Services

Page 8

To enter hours worked simply click on the "Add" button on the desired date line.

Sun 2/3		Add	-	-	-	-	-	-
Mon 2/4		Add	-	-	-	-	-	-
Tue 2/5		Add	-	-	-	-	-	-
Wed 2/6		Add	-	-	-	-	-	-

You are able to select the earnings category from the drop down list, key the hours worked within the "hours" field, and even record a comment regarding that particular line item if desired. Click "Save" upon completion.

Date	Edit	In	Out	Break	Category	Hours	Dept	
Sat 2/2		-	-	-	-	-	-	
Sun 2/3		-	-	-	-	-	-	
Mon 2/4	Cancel Save				Regular	8		Comments about this edit: (Comments appear only in edit history)
Tue 2/5		-	-	-	Sick	-	-	
Wed 2/6		-	-	-	Vacation	-	-	
Thu 2/7		-	-	-	Personal	-	-	
					Holiday	-	-	
					Misc	-	-	
					Bonus	-	-	
					Commission	-	-	

To make changes to an entry, click on the "Edit" button of the line item to be changed. This allows you to also delete the entry entirely if needed. Be sure to click the "Save" button to save your edits.

Date	Edit	In	Out	Break	Category	Hours	Amount	Dept	
Sat 2/2		-	-	-	-	-	-	-	
Sun 2/3		-	-	-	-	-	-	-	
Mon 2/4	Cancel Save Delete				Regular	8.00			Comments about this edit: (Comments appear only in

NOTE: Diocesan Internal Procedure:

When a Supervisor changes an "approved timecard" as submitted by the employee, the Supervisor must generate an internal email or notification to the employee that a change has been made to the employee's time card. In addition, the Supervisor must place a note in the "Comment" field on the employee's time card stating the reason for the change and that notice was sent to the employee. The employee will need to "re-approve" the change made by the Supervisor, and place a note in the "Comment" field on the time card accepting the change. The Supervisor will then need to approve again the resubmitted "employee approved" time card for transmission to payroll.

This series of actions will be archived in the *IOI* Time log for review via the "Punch Notes Report".

If you have keyed a comment on any of the date lines, there will be a yellow highlight in the top right hand corner of the Category and Hours fields. Using your mouse, you can hover over the field and a pop-up window will appear with the details of that comment.

Date	Edit	In	Out	Break	Category	Hours	Amount	Dept
Sat 2/2		-	-	-	-	-	-	-
Sun 2/3		-	-	-	-	-	-	-
Mon 2/4		-	-	-	-	8.00		
Tue 2/5		-	-	-	Sick	8.00		
Wed 2/6		-	-	-	-	8.00		
Thu 2/7		-	-	-	-	8.00		
Fri 2/8		-	-	-	-	-	-	-

1. Test Employee[employee1](204.89.143.1,[UTC 2013-02-06 16:19:11]) new record: CATEGORY=Sick; time: 8 hours Called off sick

Another feature useful to managers is the ability to add notes to an employee’s time card. By clicking on the “pencil” icon a note can be added to show on the time card.

The screenshot shows a time card interface with a list of dates from Sun 2/3 to Wed 2/13. A 'Notes' dialog box is open over the Mon 2/4 entry. The dialog box has a title bar 'Notes' and a close button. The main area contains a text input field with the text 'Employee will be leaving early every Monday for classes.' Below the input field, it says '(Maximum characters: 4000) You have 3944 characters remaining.' and has 'Save' and 'Close' buttons.

This is a close-up of the Mon 2/4 entry from the time card. It shows the date 'Mon 2/4', a pencil icon, and 'Edit' and 'Add' buttons. The 'Hours' field contains '6.00'. Below the entry, there is a note: 'Employee will be leaving early every Monday for classes.'

Approving Hours

The *IOI* Time system requires each employee to approve the hours entered on their time card. Located within the "Date" column are icons that appear as people-like figures. Using your mouse, you can hover over the icon and a pop-up window will appear letting you know if that entry has been approved by the employee or still needs approval.


















Date	Edit	In	Out
Sat 2/2	Add	-	-
Sun 2/3	Add	-	-
Mon 2/4	Edit Add	-	-
Tue 2/5	Needs your approval. Approved by employee employee1.	-	-
Thu 2/7	Edit Add	-	-

You have the ability to approve the employee's entire time card. To approve the time card, click on the "Approve All Entries" button located above the "Date" column.

Approve All Entries	
Date	
Sat 2/2	
Sun 2/3	
Mon 2/4	
Tue 2/5	
Wed 2/6	
Thu 2/7	
Fri 2/8	
Sat 2/9	
Sun 2/10	
Mon 2/11	
Tue 2/12	
Wed 2/13	
Thu 2/14	
Fri 2/15	
Totals	

You will receive a message asking you confirm the approval of all entries. Click "Ok" or "Cancel" to this message.

Once an entry is approved the icon changes to green. Hovering over the icon displays the pop-up window which also confirms the management/supervisor level approval.

Date
Mon 1/14  
Tue 1/15  
Wed 1/16 
 This employee w
Thu 1/17  
Fri 1/18  
Sat 1/19  
Sun 1/20  
Mon 1/21   

Maintenance Menu

Employee Groups

The employee groups feature lets you group employees together for easy selection elsewhere in the site. Employees can either be picked off a list, or can be defined as all the employees matching some criteria. If you define the group with criteria, then the group membership will automatically update if necessary, each time a change is made to an employee.

Two kinds of groups are available. A "list" group contains a specific selection of employees, and is automatically created when you choose employees individually with checkboxes. A "smart" group is created when you choose criteria that can be automatically matched (such as their name, department, or other selection). Employees are automatically added to and dropped from "smart" groups as needed, whenever their information is updated.

Finalize Pay Period

About Finalization

Finalizing a pay period will ensure your *IOI* Time data is in sync with payroll.

When a pay period is finalized, the following occurs:

- Time cards are no longer able to be edited for the period.
- A copy of the data for the finalized period is created for payroll purposes.

Note: To make changes for a finalized pay period, the period must first be “un-finalized.” To un-finalize the most recent finalized pay period, select the un-finalize option and click “Submit”. Please note you can only un-finalize the last finalized period.

Finalization Status

This section will list the status of the most recent payroll.

Action

Allows you the ability to “Finalize” the current pay period or “Unfinalize” the prior pay period.

Quick Add Time Card Entries

This screen is used for adding the same entry to multiple time cards, such as hours, holiday pay, and bonuses.

Reports Menu

The reports menu offer several types of reports to view. Each report allows you the ability to set the criteria such as pay period, report options, which employees to include and sort orders.

- Approvals Report – Identifies employee and supervisor/manager approvals as well as total hours.
- Audit Log Report – This report displays a log of entries.
- Detail Report - This shows employee information, punches on a daily basis as well as totals.
- Punch Notes Report – This displays the comments made by employees and/or supervisors.
- Summary Report - The summary report shows you total hours by category and amount of edits.
- Time Off Request Report – This report can be run for a specific employee by date range to show time off requests.

Settings Menu

Under the settings menu you will have the ability to update personal information. This includes your login and password, phone number and email address.