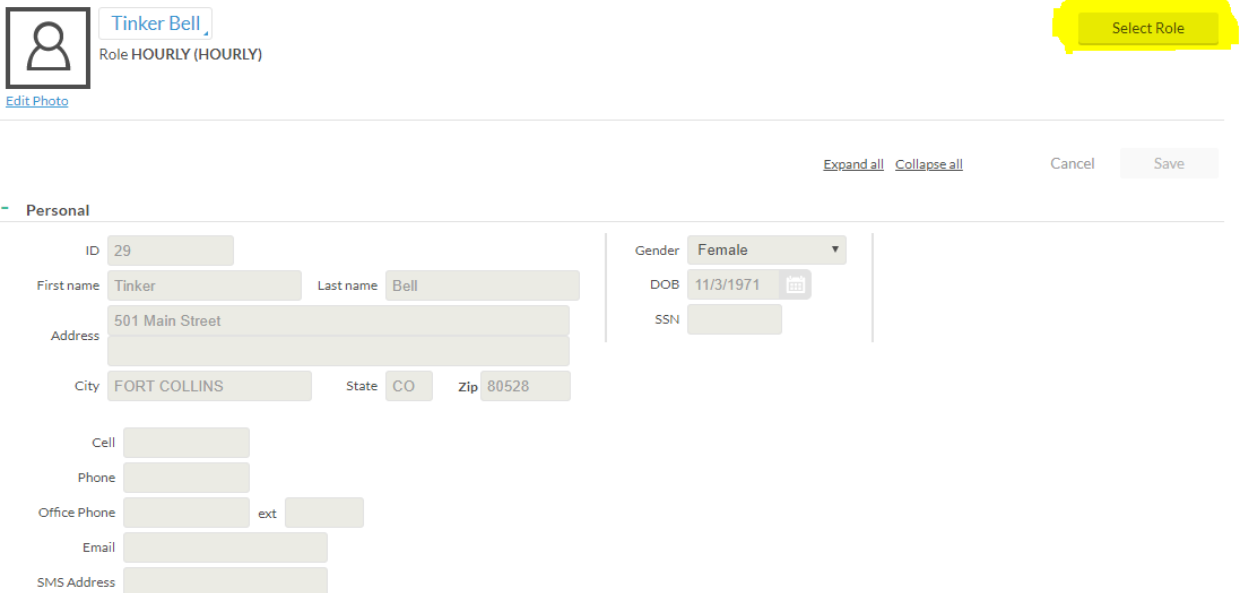



Employee Roles & Badge Number

When you enter a new employee into the prism system or through electronic onboarding you will need to assign that employee a role **Employees will not be able to punch until a role is assigned**. About an hour after they show up in the Prism system, their information will automatically load into the Time & Labor System. The same steps below would apply if an employee has a status change and their role needs to change.

1. Log into Prism as usual
2. Go to Time & Labor
3. When the Dashboard loads, click on menu item across the top that says Employee
4. You will then choose Employee Profiles
5. Your employee list will load down the left side of the page
6. Click on the appropriate employee
7. Choose Select Role button from right side of page



 **Tinker Bell**
Role HOURLY (HOURLY) [Edit Photo](#) Select Role


[Expand all](#) [Collapse all](#) [Cancel](#) [Save](#)


Personal


ID	29	Gender	Female
First name	Tinker	Last name	Bell
DOB	11/3/1971	SSN	
Address			
501 Main Street			
City	FORT COLLINS	State	CO
Zip	80528		
Cell			
Phone			
Office Phone		ext	
Email			
SMS Address			

8. When the Pop Up Box comes up select the new role and then hit select at bottom right

Role Assignment ? Feedback

Automatic break effective date 

Recurring schedule effective date 



Showing 2 records of 2

Role ID↑	Description
	None
FT SALARY	FT SALARY

9. Assign Bade Number – The badge number is typically 1 and the last 4 digits of SS#
10. Employee Info Tab Go to bottom of page and click other to expand. Add the badge number and hit save.



Kye Young
Role HOURLY (HOURLY)

Select Role

[Edit Photo](#)

[Expand all](#) [Collapse all](#)

[Cancel](#)

[Save](#)

- Personal

ID	32	Gender	Male
First name	Kye	Last name	Young
DOB	8/22/2002	SSN	
Address 71 S 2610 E			
City	SAINT GEORGE	State	UT
Zip	84790		
Cell			
Phone			
Office Phone		ext	
Email	getsmarttrekkie@gmail.com		
SMS Address			

+ Company

- Other

Network ID	d68885
PIN	
Badge	12839

How to edit punches, add missed punches or add vacation or sick leave to Time & Labor Timesheet.

1. Log into Prism
2. Go to Time & Labor
3. When the Dashboard loads, click on the menu item across the top that says Hours
4. Then Click either Individual Hours or Group Hours (whichever applies)
5. If Individual choose employee from the left side, then choose applicable pay period. This pay period or last pay period
6. If adding a punch click add, when the pop up box comes up add time and time out and save. If you want to put in a flat amount of hours you can check the timesheet box. Add Flat amount of hours and if you need to change the job code you can do that as well. For use when you need to add sick, vacation or holiday pay

The screenshot shows a dialog box titled "Add" for creating a new punch. On the left, there are three checkboxes: "Individual is clocked in" (unchecked), "Time sheet entry" (checked), "Missed in punch" (unchecked), and "Missed out punch" (unchecked). The main area contains the following fields: "Time in" (3/6/2018, 09:00 AM), "Time out" (3/6/2018, 05:00 PM), "Break type" (selected as "<< NONE >>"), "Job Code" (selected as "2 - Regular"), "Cost Code" (selected as "<< NONE >>"), "Rate" (0.00), and a "Note" text area. At the bottom, there is a "Days" dropdown set to "1" and three buttons: "Extra", "Cancel", and "Save". A "Segment Length: 8:00" indicator is visible at the top right of the dialog.

7. To edit a punch, click the box on the row that you want to edit.

Showing 6 records of 6 Selected 0 records

		M	E	O	Notes		Time In	Time Out	Hours	Shift Total	Week Total	Job Code	Rate
<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2/26/2018 02:05 PM	2/26/2018 10:15 PM	8:10	8:10		2 - Regular	0.00
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2/27/2018 07:00 AM	2/27/2018 10:05 PM	15:05	15:05		2 - Regular	0.00
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/1/2018 04:05 PM	3/2/2018 12:05 AM	8:00	8:00		2 - Regular	0.00
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/2/2018 02:05 PM	3/3/2018 12:10 AM	10:05	10:05		2 - Regular	0.00
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/3/2018 08:00 AM	3/3/2018 04:10 PM	8:10	8:10	49:30	2 - Regular	0.00
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/5/2018 02:00 PM	3/5/2018 10:05 PM	8:05	8:05	8:05	2 - Regular	0.00

8. Click the manage button



The choose edit or delete.

9. Same Process for Group Hours.....

10. To Add a Break in the Punch Time go to Manage, Add Break and then add then break time information.

Add Break



Feedback

Time in 4/4/2018 08:06 AM

Time out 4/4/2018 05:31 PM

Date 4/4/2018

Time 12:48 PM

Break length 240

Break type Break

Note

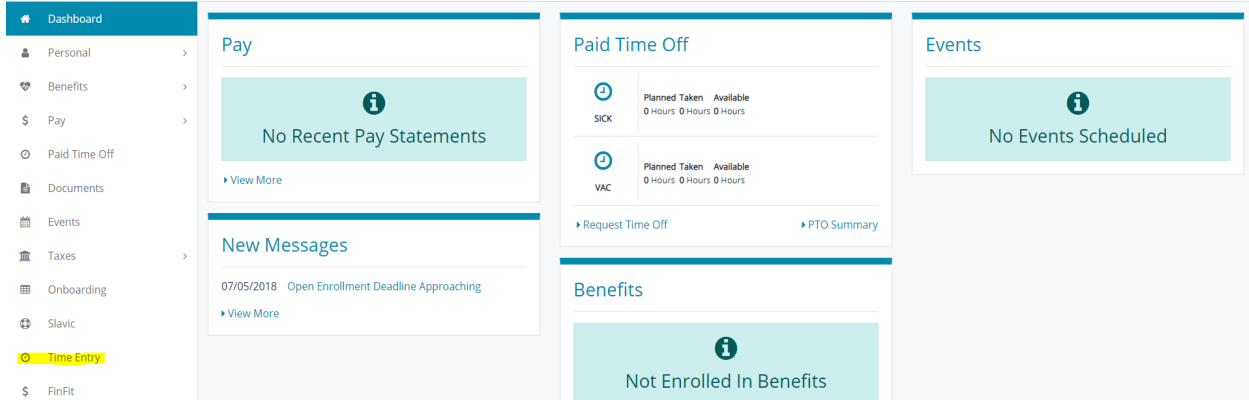
Track information goes with First Segment

Second Segment

Requesting Time Off through Time & Labor

Log into your employee ESS Portal

Once the Dashboard loads click on Time Entry



Once you click on Time Entry the following screen will pop up.

Click on Requests. Then Click Add and complete information. Once Manager approves or denies you will be notified.

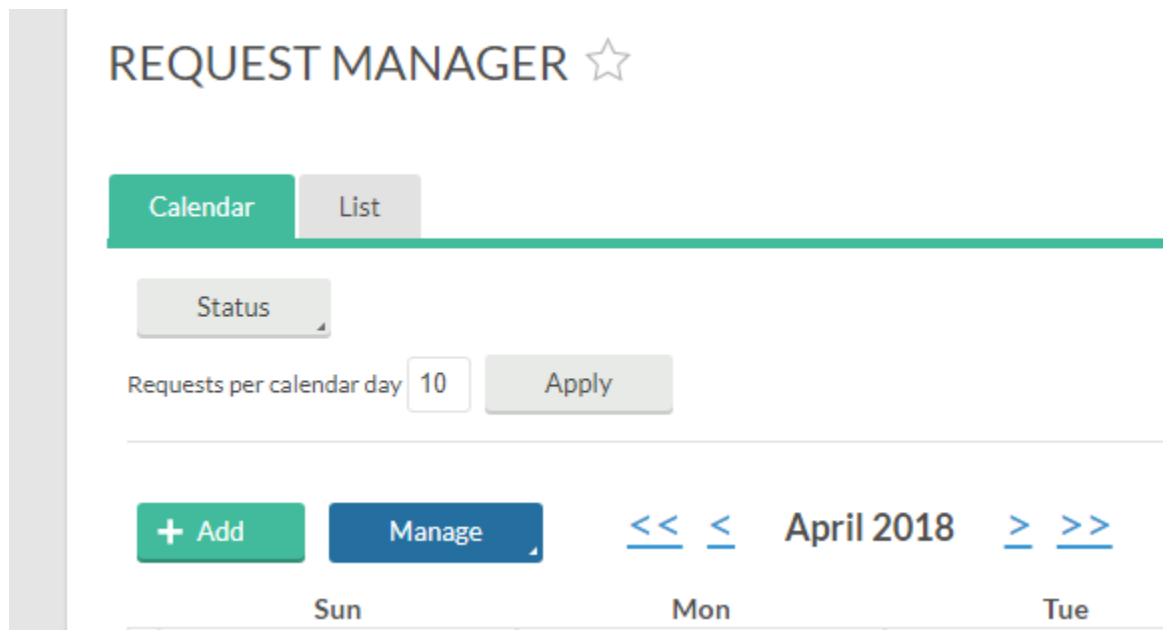


+ Add
Manage
Refresh
<< < September 2018 >> >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31 Approved (1) 08:00 AM 8:00 2 - PTO	1
2	3	4 Approved (1) 08:00 AM 8:00 2 - PTO	5	6	7	8
9	10	11	12	13	14	15
16	17	18 +	19 +	20 +	21 +	22 +
23	24 +	25 +	26 +	27 +	28 +	29 +
30	1 +	2 +	3 +	4 +	5 +	6 +

Approving Leave Requests

1. Log in to Prism
2. Go to Time & Labor
3. Once the Dashboard Loads you will see a box with Pending Time off Requests.
4. At the Bottom of the Box there will be a blue hyper link that says jump to Request Manager
5. Click that hyper link and it will take you to the request manager. (you can also access it by going to Tools and then Request Manager)
6. Once there you will see the calendar with all the pending requests for your approval. Just click on the Request and then go to Manage.



7. Once you click on Manage Click Approve Request Level 1 or you can click Deny.

The system will notify the employee of the approval or denial of the request.

Export Payroll to Prism & Close Week

1. Log into Prism
2. Go to Time & Labor
3. When the Dashboard loads go in and make and final time punch adjustments under hours
4. Once all employees are ready to be finalized go to Company and then Close Week
5. Click on the Close Week Button for each week in the pay period that needs to be closed
6. Once that is completed go to Hours and then Period Export
7. Export Format Should be PrismHR (choose from drop down if not default)
8. Pay Period should be Last Period (choose from drop down)
9. Under Settings split by job code box should be checked & Group by Pay Code should be checked
10. Under Configuration Import Template Configuration should be TCPimport (choose from drop down if not there)
11. Payroll Batch Number **CLICK IN DROP DOWN BOX AND CHOOSE THE MOST RECENT NUMBER**
12. Click the Generate Button

The screenshot displays the PrismHR interface for exporting payroll. At the top, the 'Template' is set to 'Default' and the 'Export Format' is 'PrismHR (7.0.57.5)'. The date range is '2/16/2018' to '2/28/2018' with the 'Last Period' selected. There are buttons for 'Employee Filter' and 'Job Code Filter'. On the right, there are 'Save as' and 'Load' buttons, and a 'Generate' button highlighted in yellow.

Settings

- Hours file for download:
- Split by job code
- Split by rate
- Split by cost code
- Export hours for salaried individuals
- Export hours with 4 decimals
- Export employee social security number
- Group similar records by week

Configuration

Company Settings

- Import Template Definition: TCPimport
- Payroll Batch Number: 20183
- Employee Location: << NONE >>
- Use extended field length
- Include department

Earn Codes

- Regular: << NONE >>
- Overtime 1: << NONE >>
- Overtime 2: << NONE >>

13. Once you click Generate the system run the data. If any exceptions occur you can accept or reject them. Exceptions will be if someone is negative in their leave etc. If you accept the exceptions the system will continue to run and post to the timesheet. If you reject the process stops and you can make any corrections to the time and the run the process again. After the process is done running it will say 100% and then you can close. At this point go back to Prism and go to Time Sheet Entry and make any necessary entries or you can click finalize.

Close Week

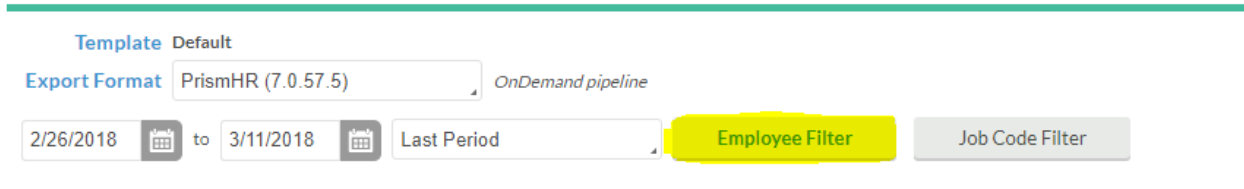
1. In the Time Clock System Go to Company and then close week

The screenshot displays the 'Close Week' interface within the Time Clock System. The top navigation bar includes 'HOURS', 'SCHEDULES', 'EMPLOYEE', 'REPORTS', 'TOOLS', 'CONFIGURATION', and 'COMPANY'. The 'COMPANY' menu is expanded, showing 'Close Week', 'Company Defaults', 'Company Setup', 'Custom Fields', 'Holidays', and 'Automated Tasks'. The main content area features a 'CLOSE WEEK' header with a star icon and a 'Feedback' button. Below this, there are two buttons: 'Close Week' (highlighted in yellow) and 'Undo Close Week'. The 'Close Week' button is associated with the text 'Close week of 09/16/2018 - 09/22/2018'. The 'Undo Close Week' button is associated with 'Undo close week of 09/09/2018 - 09/15/2018'. A section titled 'Closed week of 09/09/2018 - 09/15/2018 (requested by infsftzwat)' contains a list of completed tasks:

- ✓ Pre-Check
- ✓ Loading Employees
- ✓ Loading Data
- ✓ Processing Accrual Banks
- ✓ Transfer Schedule Segments to Work Segments
- ✓ Update Current Week

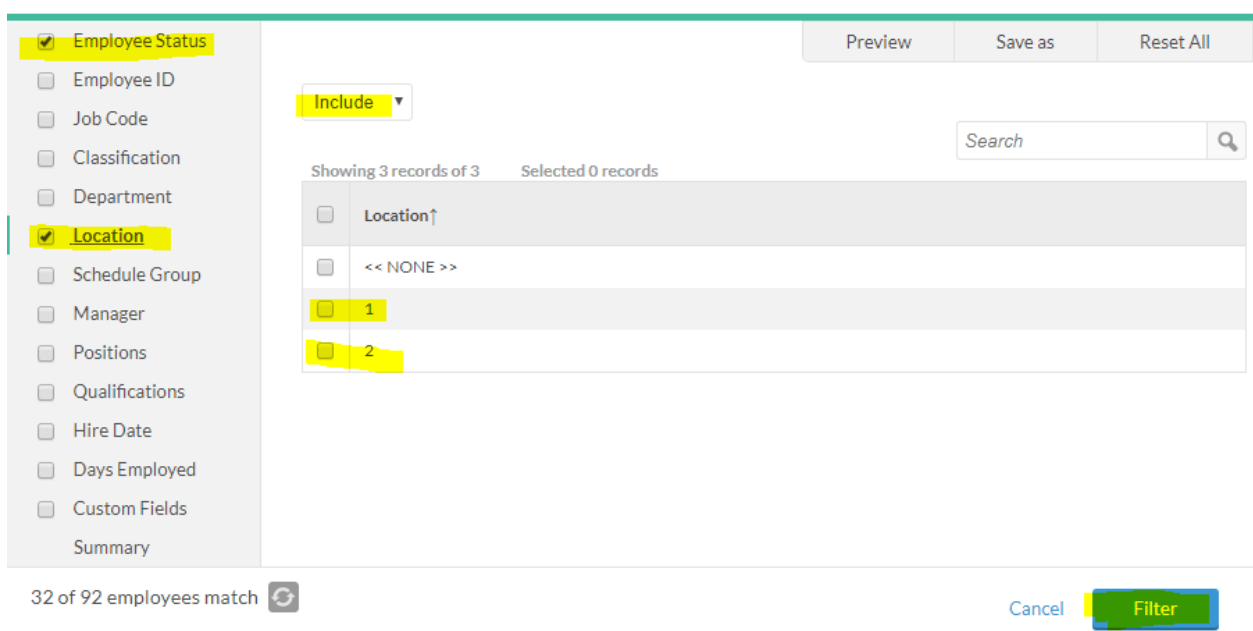
In order to export the payroll by location

While in the payroll export screen, click on employee filter



The screenshot shows the top section of the payroll export interface. It includes a 'Template' dropdown set to 'Default', an 'Export Format' dropdown set to 'PrismHR (7.0.57.5)' with a note 'OnDemand pipeline', and two date range pickers. The first date range is '2/26/2018' to '3/11/2018' with a 'Last Period' dropdown. A yellow 'Employee Filter' button is highlighted, along with a grey 'Job Code Filter' button.

Once the screen comes up click the location option if it is already checked then uncheck and check again to get the locations to show up. Choose the location to export and then filter



The screenshot shows the 'Employee Filter' dialog box. On the left is a list of filter categories with checkboxes: 'Employee Status' (checked), 'Employee ID', 'Job Code', 'Classification', 'Department', 'Location' (checked), 'Schedule Group', 'Manager', 'Positions', 'Qualifications', 'Hire Date', 'Days Employed', 'Custom Fields', and 'Summary'. On the right, there are 'Preview', 'Save as', and 'Reset All' buttons, an 'Include' dropdown, a search box, and a table. The table shows 'Showing 3 records of 3' and 'Selected 0 records'. The table has a header 'Location↑' and three rows: '<< NONE >>', '1', and '2'. At the bottom, it says '32 of 92 employees match' with a refresh icon, and 'Cancel' and 'Filter' buttons.

Location↑
<< NONE >>
1
2

Continue to export as normal.