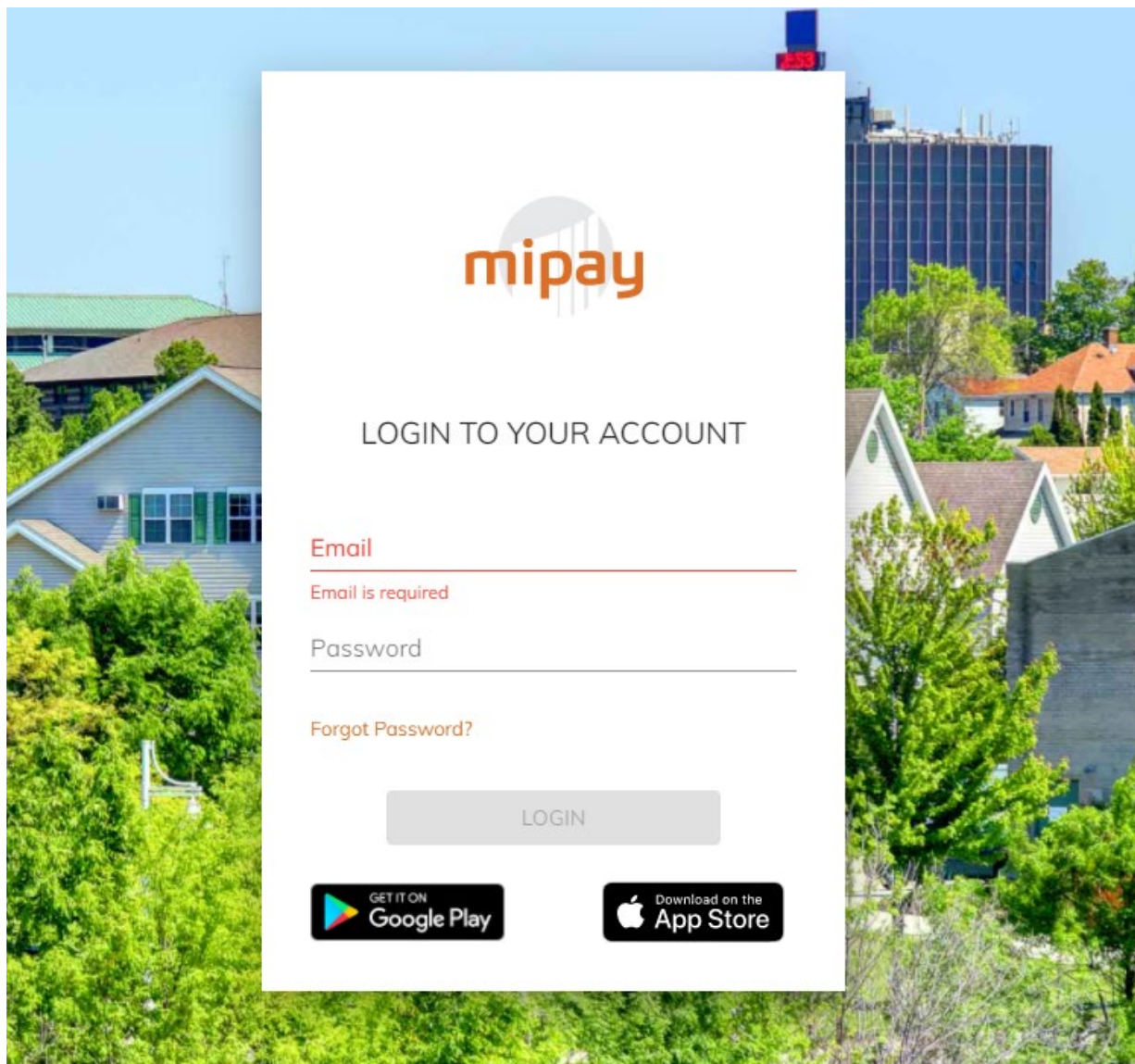


---

## miPayOnline - Administrator

---

*The Payroll Employee (and at least one other) is usually set as the Site Administrator.*





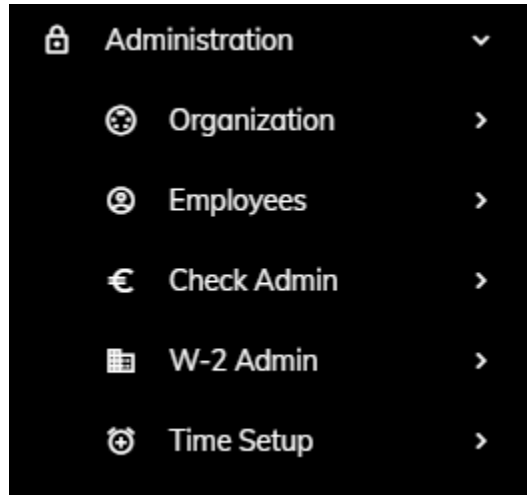
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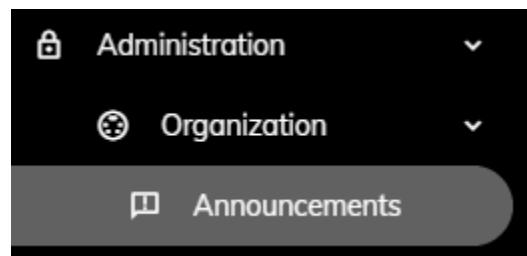


## Administration

Employees with Site Administration can access the Administration menu which will allow them to change wording on the site, turn site features on or off, setup and make changes to types of times, approval process, upload and send announcements, upload pay stubs and W2s and monitor employee settings.



## Organization Announcements



From the Announcements menu you can view past announcements on the left and create new announcements on the right.



Announcements

Drag a column header here to group by that column

Header	Send Email	Permanent	Start Date	End Date	Announcement Type
Employee Handbook	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Information
Holiday Party	<input type="checkbox"/>	<input checked="" type="checkbox"/>			Information
test	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Information
Test an announcement	<input checked="" type="checkbox"/>	<input type="checkbox"/>	8/17/2018, 7:00 ...		Information
Air Conditioner	<input type="checkbox"/>	<input type="checkbox"/>	8/21/2018, 3:07 ...	8/31/2018, 10:0...	Important
Symposium	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9/13/2018, 11:4...	9/14/2018, 11:4...	Important
test	<input checked="" type="checkbox"/>	<input type="checkbox"/>			Information
New Employee miPay wel...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8/1/2019, 8:30 A...		Information
FMLA Form	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/3/2019, 12:55 ...		Information
Reminder to update payro...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9/29/2019, 8:29 ...	9/29/2019, 8:29 ...	Information
test attachments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3/18/2020, 4:36 ...	3/18/2020, 5:00 ...	Information
test adding attachment t...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4/7/2020, 7:35 A...		Information
Email Test for monica	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4/7/2020, 7:22 A...		Information
Vacation Policy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			Important

Details

General Who/When Atta

Header

Type
0 / 100

Information

☐ Send Email Notification  
☐ Permanent  
☐ Archived

Message

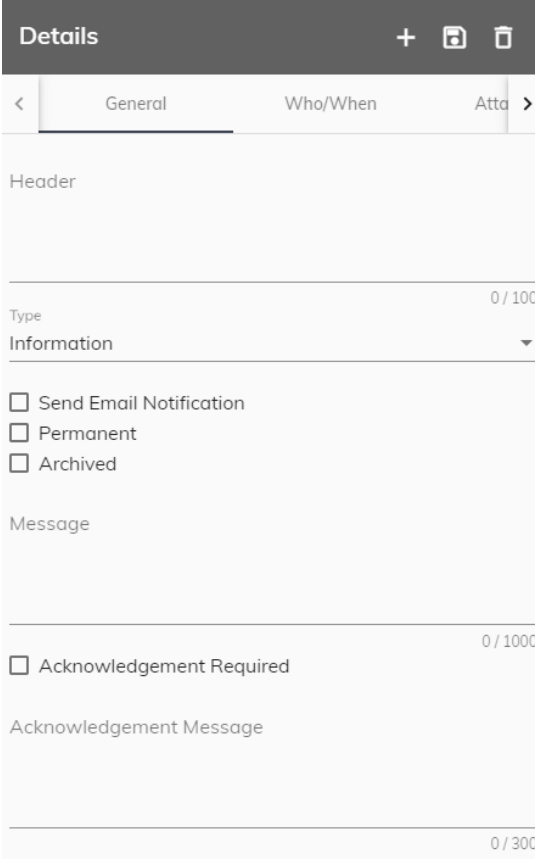
☐ Acknowledgement Required
0 / 1000

Acknowledgement Message

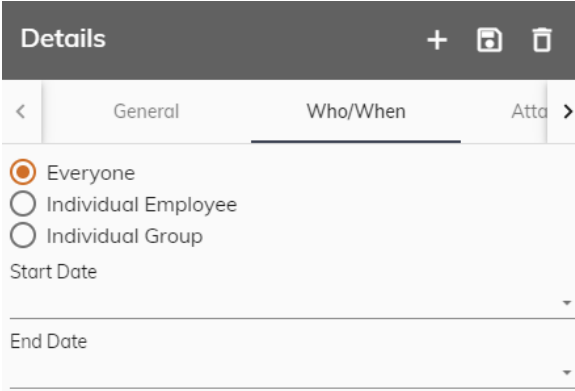
0 / 300

To create a new Announcement the Site Administrator will click on the plus sign on the upper right side of the screen. Then on the General tab you will type a title for the announcement in the Header section. The Type of announcement can be Information or Important; information announcements are coded with a blue exclamation point while important announcements are coded with a red exclamation point on the home screen. Next you check the boxes as to whether the site should send an email alerting recipient of the announcement. Check the box for Permanent to have the announcement stay on the right side of the Home screen. And check the box for Archived to “hide” the message on the Home screen; it is still viewable on the Home screen if employees click the three dots to show archived announcements. Next you will type the message of the announcement (this is required).





On the Who/When tab of the announcement you will select who the message should be sent to by clicking the radial dial next to Everyone, Individual Employee or Individual Group. If Individual Employee or Individual Group are selected, you will select the employee or group from a drop down that will appear before the start date. Next select when the message will be available for viewing. Select a Start Date and an End Date, you can leave the start and/or end date fields blank.



On the Attachments tab you can click Upload Attachment or select an existing attachment to link to the message. Attachments are not required. When finished, click the disk icon to save\send\post the announcement or click the garbage can to delete the message.



Details

al

Who/When

Attachments

Upload Attachment

You can also drop the attachment file here to upload

OR

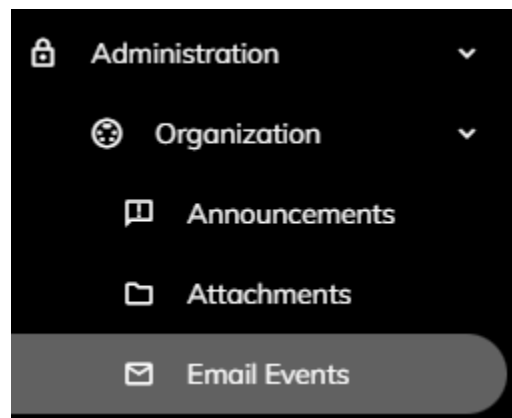
Select an attachment to add

Select an attachment

Description

Url

## Email Events

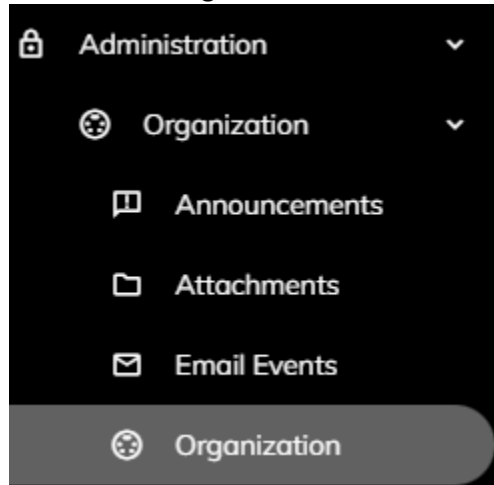


The Email Events is a log of all emails and their status sent by the site. If an employee states that they are not receiving emails you can review the log to see if the emails are being blocked or received and possibly being sent to junk or spam.

Email Events								
Drag a column header here to group by that column								
Timestamp	Employee Nu...	Employee Name	Email	Category	Send Grid Eve...	Type Name	Reason	Status
9/4/2018, 9:5...	10	Julie Rockford	mmeyer@civic...	[ *New User E...	open			
9/4/2018, 9:5...	10	Julie Rockford	mmeyer@civic...	[ *New User E...	delivered			




## Organization



Standard wording will be set up for each organization, but Site Administrators can update the wording for the Home Page and Welcome email on the Basic Info tab. If the Send Email to New Employees box is not checked, new employees will not receive the welcome email to set their password and login. Site Administrators have the ability to convert all employee address changes to uppercase by checking the box to Convert Address To Uppercase. If this box is not checked the address will update in the case that is typed by the employee. Site logos can also be updated by clicking the Upload Site Image and browsing to the new logo. After any changes in the Organization menu, the Site Administrator should click Save in the upper right corner of the screen.

## Basic Info


**Organization**
SAVE

Basic Info
 Paychecks
 W-2's
 Forms
 Time Entry
 Time Off

---

Organization Number  
 1

---

Organization Name \*  
 Civic Systems, LLC

---

Time Zone \*  
 (UTC-06:00) Central Time (US & Canada)

---


Payroll Group  
 Civic Systems, LLC Payroll Group

---

Home Screen Title \*  
 City of Anycity Payroll Portal

---

Home Screen Message
 


**B**
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 Size
 Font
 A\*
 [List Icons]
 [Link Icon]
 [Code Icon]

Hello! This is your employee portal where you can view your paychecks, W-2's, and much more!




☒ Send Email To New Employees

New Employee Email Subject \*

Payroll Portal Welcome Email

New Employee Email ⓘ


**B**
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Size
Font
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Your username is {{UserName}}.  
 This is an automated email that has been sent from an unmonitored account. Please do not reply to this email message. If you have questions, please send all email inquiries to [support@civicsystems.com](mailto:support@civicsystems.com).  
 Welcome to Anycity' new miPay Online web portal for your payroll information. This email contains the information that you will need to access your payroll stubs for the first time.  
 Your miPay Online account name is: {{UserName}}  
 In order to log in to the system for the first time, you will need to set an initial password. Please {{ResetLink}}  
 Once your password has been entered, you will be able to log in to the system at <https://www.mipavonline.com> using the account name listed above and the password that you selected. When you log into the system successfully for the first time, please click on the My Profile tab and select three different security questions and answers. These questions may be used to verify your identity during login, and they are also used when making automated service requests for your account (such as password reset requests). In the My Profile tab, you can also select your preferences for receiving email notifications when new payroll statements are available for viewing.


☐ Convert Address To Uppercase

Upload Site Image

You can also drop images here to upload. Only PNG, JPG, GIF - Max. 8MB

## Paychecks


The check boxes on the Paychecks tab activate the ability to upload employee pay stubs. The site will send an email to employees when new pay stubs are uploaded to the site if the Send Email For New Paychecks box is selected. Site Administrators can update the wording in the email; standard language is set up.


**Organization**

Basic Info
 **Paychecks**
 W-2's
 Forms
 Time Entry
 Time Off

☒ Enable Paychecks  
☒ Send Email For New Paychecks  
 New Paycheck Email Subject \*  
 New Check From Demo City!

New Paycheck Email ⓘ

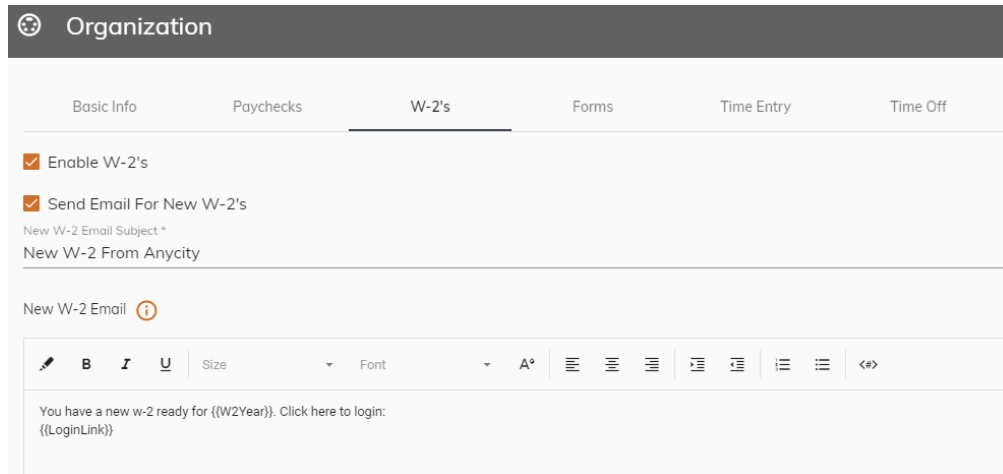

**B**
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U
Size
Font
A<sup>0</sup>

You have a new check ready and waiting {{LoginLink}}



## W-2's

The check boxes on the W-2's tab activate the ability to upload employee W-2s. The site will send an email to employees when new W-2s are uploaded to the site if the Send Email For New W-2's box is selected. Site Administrators can update the wording the email; standard language is set up.



**Organization**

Basic Info   Paychecks   **W-2's**   Forms   Time Entry   Time Off

☒ Enable W-2's

☒ Send Email For New W-2's

New W-2 Email Subject \*

New W-2 From Anycity

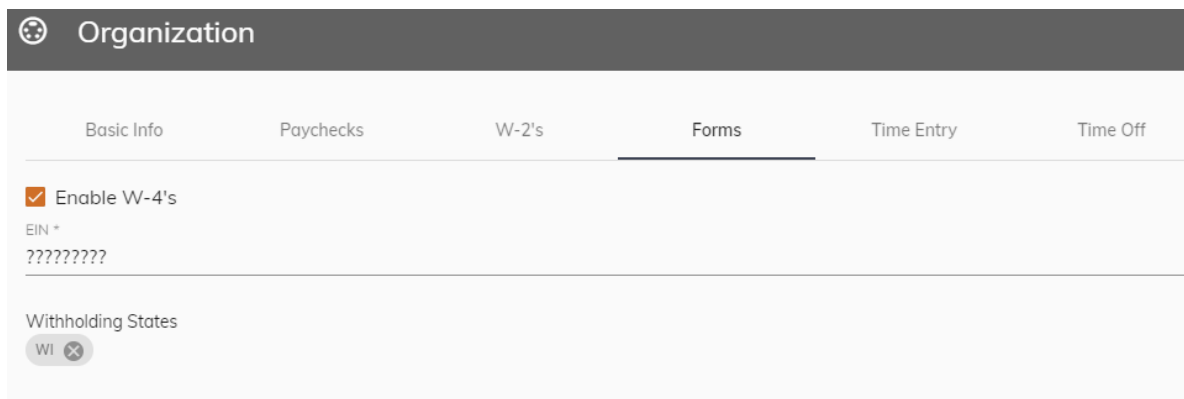
New W-2 Email ⓘ

[Pencil] **B** *I* U   Size   Font   A°   [List Icons]   [Code Icon]

You have a new w-2 ready for {{W2Year}}. Click here to login: {{LoginLink}}

## Forms

The check box on the Forms tab activates the ability for employees to submit withholding change requests. The municipality Federal Identification Number must be entered without dashes and the state of the municipality must be entered to populate and load the appropriate state withholding form.



**Organization**

Basic Info   Paychecks   W-2's   **Forms**   Time Entry   Time Off

☒ Enable W-4's

EIN \*

????????

Withholding States

WI ✕



## Time Entry Emails

The check box on the Time Entry tab activates the ability for employees to record and submit time sheets. The site will send emails if employees do not have time entered and when time is submitted for approval. Standard language is provided for these emails, but the Site Administrator can make changes.

### Organization

Basic Info

Paychecks

W-2's

Forms

**Time Entry**


Time Off

☒ Enable Time Entry

Payroll Journal Code Override

Time Missing Subject \*

Missing time


Time Missing Email Message 

 **B** *I* U Size Font A°

{{EmployeeName}},  
 You are missing time for the pay period ending {{PayPeriodStartDate}} and ending {{PayPeriodEndDate}}. Total hours entered so far - {{Hours}}.  
 Please login to enter your time.  
 {{LoginLink}}  
 {{CutoffTime}}

Time Approval Missing Subject \*

Time Needing Approval

Time Approval Missing Email Message 


 **B** *I* U Size Font A°

There is time awaiting your approval for the pay period ending {{PayPeriodEndDate}} for the following employee:  
 {{Employee}}  
 Please login to approve this time.  
 {{LoginLink}}



## Time Off Emails

The check box on the Time Off tab activates the ability for employees to submit time off requests for approval. The site will send emails when time off is requested and when the time off is approved or rejected. Standard language is provided for these emails, but the Site Administrator can make changes.


**Organization**

Basic Info

Paychecks

W-2's


Forms

Time Entry

**Time Off**

☒ **Enable Time Off**  
 New Time Off Request Pending Email Subject \*  
 New Vacation Request


New Time Off Request Pending Email Message ⓘ


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U
 Size    Font    A°

You have a new time off request pending your approval from {{EmployeeName}}  
 Subject: {{TimeOffSubject}}  
 Type: {{TimeOffType}}  
 Start Date: {{StartDate}}  
 End Date: {{EndDate}}  
 {{LoginLink}}

Time Off Request Status Changed Email Subject \*  
 New Vacation Request Status Change

Time Off Request Status Changed Email Message ⓘ

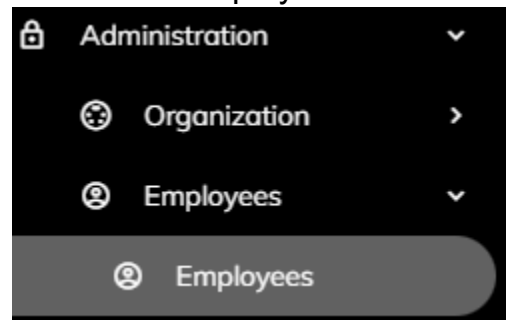

**B**
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U
 Size    Font    A°

A time off request status has changed for {{EmployeeName}}.  
 Subject: {{TimeOffSubject}}  
 Status: {{RequestStatus}}  
 Reason: {{StatusChangeReason}}  
 Type: {{TimeOffType}}  
 Start Date: {{StartDate}}  
 End Date: {{EndDate}}  
 {{LoginLink}}



## Employees

### Employees



The Employees menu allows the Site Administrator to complete setup of new employees and monitor use by employees. Employees are automatically uploaded each night from payroll so double entry is not required. You can sort by any of the fields in the employee grid to select an employee for editing. To edit an employee click once on the employee (any spot on the employee line).

Employees

RESEND WELCOME EMAIL

QUICK TEMPLATE ASSIGN

UPLOAD EMPLOYEE

Drag a column header here to group by that column

Search...

<div><div></div></div>	<div>Employee..</div>	<div>Name</div>	<div>Email</div>	<div>Department</div>	<div>Status</div>	<div>Site Ad...</div>	<div>Is Lock...</div>	<div>Read On...</div>	<div>Send N...</div>	<div>Send Va...</div>	<div>Send Va...</div>	<div>Standard P...</div>	<div>Time Off Template</div>	<div>Time Entry Template</div>	<div>Last Login...</div>
	<div>Q</div>	<div>Q</div>	<div>Q</div>	<div>Q</div>	<div>Q</div>	<div>(All)</div>	<div>(All)</div>	<div>(All)</div>	<div>(All)</div>	<div>(All)</div>	<div>(All)</div>	<div>Q</div>	<div>(All)</div>	<div>(All)</div>	<div>Q</div>
	5	Smith, Jacob S	jsmith@anycity.com	Administrati...	Full-Time	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	0	Jacob Smith Template	Public Works	9/4/2018
	10	Rockford, Julie M	mmeyer@civicsystems.co...			<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	0	Jacob Smith Template	Public Works	9/4/2018
	15	Morris, Sharon	meyer.mark.j@gmail.com	Fire	Full-Time	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	0	Jacob Smith Template	Public Works	11/20/2017
	20	Spencer, Annette	ccamen09@gmail.com	Administrati...	Full-Time	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	0	Jacob Smith Template	Public Works	9/4/2018
	25	Johnson, Douglas	meyer.mark.j@gmail.com	Electric	Full-Time	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	0	Jacob Smith Template	Public Works	11/20/2017
	30	Austin, George	cjarvi@charter.net	Water	Full-Time	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	0	Public Works Time Off Re...	Public Works	8/28/2018
	35	Slade, Randy L	chief@civicsystems.com	Police	Full-Time	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	<div><div></div></div>	0	Jacob Smith Template	Police	8/28/2018

On the employee pop up you can view the employee number and name. You can change the employee email address (remember that this is used for the employee login to the site). You can set standard pay period hours that are different than the template the employee is assigned to; if you leave it at zero it will use the template standard. This standard does not populate the employee timesheet, it is used to alert the employee if they have less than this number of hours entered for a pay period. You can set a number of days seen at one time for time entry that is different from the template the employee is assigned to. If you leave it blank it will use the template setting. And you can change the color assigned to the employee on the time off calendar (each employee is assigned a unique color by the site).



## Edit Employee

Employee Number

20

Name

Spencer, Annette

Email Address

ccamren09@gmail.com

Standard Pay Period Hours

0

Time Entry Days

Time Off Calendar Color

■ #A0BA73

You can also control which employees are Site Administrators - this gives them access to the Administration menu of the site. You can check the box to make an employee Read Only; this should be done for terminated employees so they can no longer enter time or request time off but can still view pay stubs and W2s. And you can see if an employee is Locked Out from entering their password wrong too many times. If an employee is locked out, you can uncheck the box and if they employee needs their password reset you can resend the welcome email (located at the top of the screen above the employee grid; make sure only the appropriate employee is selected as having a check mark next to their name in the grid).

Next you can assign the employee to the appropriate Time Off and Time Entry Templates. This will control what Time Tasks the employee can see and which groups will approve the employee time off and time entry.

### Other

☐ Site Administrator

☐ Read Only

☐ Locked Out?

### Templates

Time Off Template

Jacob Smith Template

Time Entry Template

Public Works

By default, the Send Notifications box is checked for each employee, however if an employee has unchecked it in their profile you will be able to see (and correct if they did not mean to) that selection here. You can also see if employees have elected to have time off appointments added to their calendars and if they have elected to receive email notifications when time off requests are approved or denied. You can see if and when and employee has opted to use the Out of Office feature to allow another employee to approve time when they are gone. And you can see if an employee has opted to use the two-factor authentication for log in purposes.

Click Save at the bottom of the Employee popup any time you make change to an employee record in the site.



**Notifications**

☒ Send Notifications ☐ Send Vacation Appointments ☐ Send Vacation Status Change Emails

**Out of Office**  
 Out of Office Workflow User

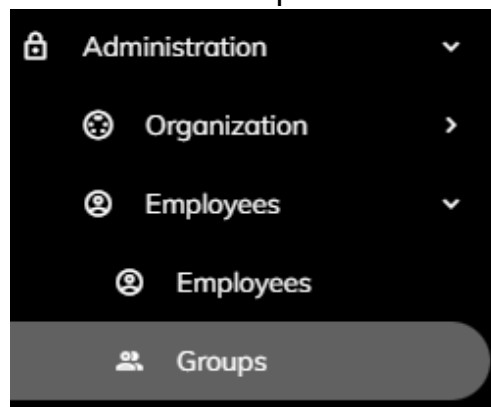
Out of Office End Date

**Two Factor Authentication**

☐ Text Code ☐ Authenticator App

**SAVE** **CANCEL**

## Groups



Groups are used for two purposes: approvals and announcements. Approval groups should include the employees that approve time for others, not employees being approved. Announcement groups are any combination of employees that you may send an announcement to like unions, departments, full-time versus part-time, etc. Groups are set up by clicking the Add Group button. A Name is provided to the Group. Select the employees that belong to the group by checking the box to the left of the employee number and click Add Selected. Multiple employees can be added at the same time, and you can search for employees by typing next to the magnifying glass in the employee number, first name, last name or department fields. Click Save Group when all appropriate employees are added.

**ADD GROUP**

Civic Systems, LLC Payroll Group  
 Jacob Smith Admin Group  
 Jason Harrison Admin  
 Julie Rockford Admin Group  
 Maurice Hobson Admin Group  
 New Employees  
 new group  
 Police - Dispatch  
**Public Works Time Approval Group**

**Groups** **SAVE GROUP** **DELETE GROUP**

Group Name  
Public Works Time Approval Group 32 / 50

**Available Employees**

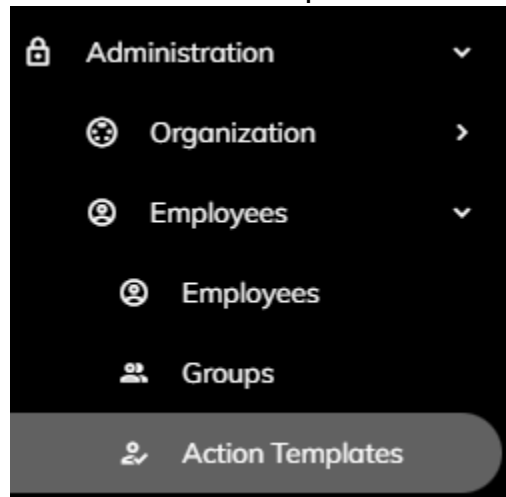
<input type="checkbox"/>	Employee...	First Name	Last Name	Departm...
<input type="checkbox"/>	1853	Civic Admin		
<input type="checkbox"/>	5	Jacob	Smith	Administrat...
<input type="checkbox"/>	10	Julie	Rockford	
<input type="checkbox"/>	15	Sharon	Morris	Fire
<input type="checkbox"/>	20	Annette	Spencer	Administrat...
<input type="checkbox"/>	25	Douglas	Johnson	Electric
<input type="checkbox"/>	30	George	Austin	Water

**Group Employees**

<input type="checkbox"/>	Employee Numb...	First Name	Last Name
<input type="checkbox"/>	95	Benjamin	Granger



## Action Templates



Employee Action Templates allow employees the ability to submit Address, Contact, Direct Deposit, and Name changes. To enable this feature for your employees simply create a new Employee Action Template, name it, and select the Change Type that you would like to enable. Employees will then be able to submit change requests via their Profile.

NEW COPY		Employee Action Templates		SAVE TEMPLATE	DELETE TEMPLATE
Address Change	Template Name	Address Change		14 / 100	
Contact Change	General	Steps			
Direct Deposit	Change Type	AddressChange			
Name Change					

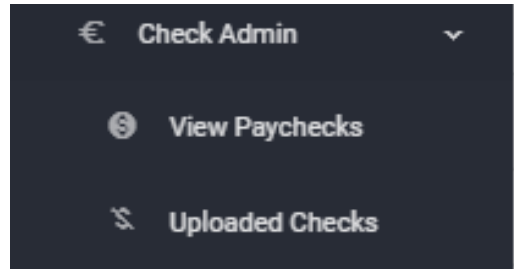
Like other templates, Employee Action Templates can have approval steps assigned to them. You can also select No Workflow if you would like the submitted changes to take effect immediately with no approval process.

NEW COPY		Employee Action Templates	
Address Change	Template Name	Contact Change	
Contact Change	General	Steps	
Direct Deposit	<input checked="" type="checkbox"/> No Workflow		



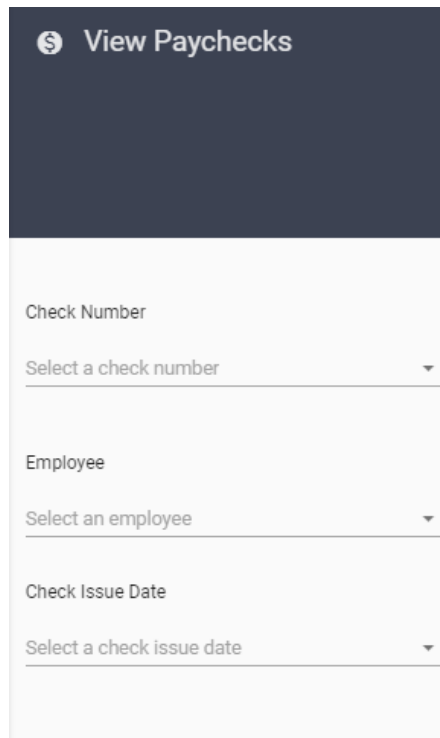
## Check Admin

The Check Admin menu allows the Site Administrator to view pay stubs that have been uploaded for all employees and upload additional pay stubs.



## View Paychecks

From the View Paychecks menu, the Site Administrator can search for a pay stub by entering the check number or entering the employee and check issue date. The image of the pay stub will appear on the right. The Site Administrator can view, print or save the image. There may be formatting differences between this pay stub and those printed from the software. One significant difference is that the miPayOnline pay stub will show each pay rate an employee is paid at during a year while the pay stub generated by the software will always show the employees current pay rate.

A screenshot of a mobile application form titled 'View Paychecks' with a white dollar sign icon (\$) in a dark blue header. The form has three sections, each with a label and a dropdown menu: 'Check Number' with 'Select a check number', 'Employee' with 'Select an employee', and 'Check Issue Date' with 'Select a check issue date'. Each dropdown menu has a white downward arrow.

## Uploaded Checks

From the Uploaded Checks menu, the Site Administrator can see the past payrolls that have been uploaded to the site along with the number of pay stubs uploaded for each pay period. To upload new pay stubs, the site administrator will click Upload Checks from the upper right corner of the screen.



Uploaded Checks				REFRESH	UPLOAD PAY PERIODS	UPLOAD CHECKS
Drag a column header here to group by that column				<input type="text" value="Search..."/>		
Check Issue Date ▾	Pay Period Date ▾			▾ Number Of Checks		
<input type="text" value="4/4/2018"/>	<input type="text" value="3/30/2018"/>	<input type="text" value="25"/>	<input type="text" value="18"/>			
4/4/2018	3/30/2018	25	18			
2/27/2017	2/20/2017	18	24			
2/13/2017	2/6/2017	24				

From the Upload Checks popup, the Site Administrator will select the pay period for the checks that will be uploaded. The Supplemental Check Issue Date only needs to be populated if supplemental checks were issued in that pay period with a different check issue date. The Send Notifications box is checked by default and will allow you to select when the checks will be viewable on the site and when an email notification will be sent to any employee that has a check uploaded for that payroll. You can set the Notification Send Date (and time); pay stubs are not viewable until that time and the email notification is not sent until that date and time. Press Upload Checks to send the request to the server for the upload.

Upload Checks

Pay Period

Supplemental Check Issue Date

☒ Send Notifications

Notification Send Date

9/4/2018, 11:17 AM

Drag a column header here to group by that colu...

Search...

Field Name ▾

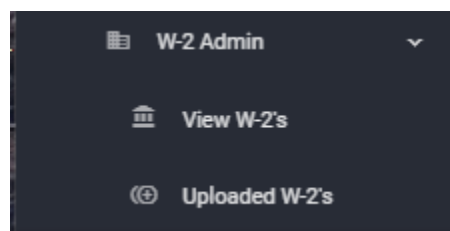
Criteria ▾

UPLOAD CHECKS

CANCEL

## W-2 Admin

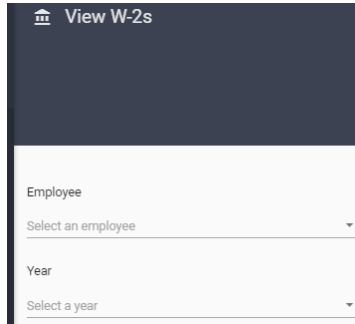
The W-2 Admin menu allows the Site Administrator to view W2s that have been uploaded for all employees and upload additional W2s.





## View W-2's

From the View W-2's menu, the Site Administrator can search for a W-2 by entering the employee and year. The image of the W-2 will appear on the right. The Site Administrator can view, print or save the image.

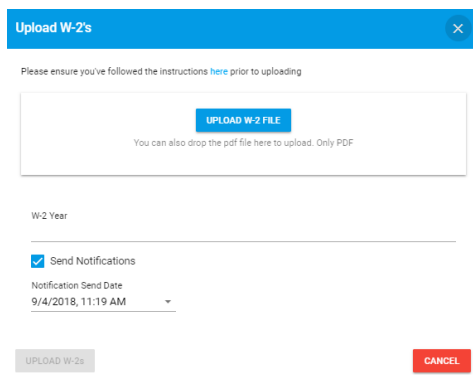


## Uploaded W-2's

From the Uploaded W-2's menu, the Site Administrator can see the past years that have been uploaded to the site along with the number of W-2s uploaded for each year. To upload new W-2s, the site administrator will click Upload W-2's from the upper right corner of the screen.

Uploaded W-2's			REFRESH	UPLOAD W-2's
Drag a column header here to group by that column			Search...	
Year		Number Of W2s		
2017		26		
2015		25		

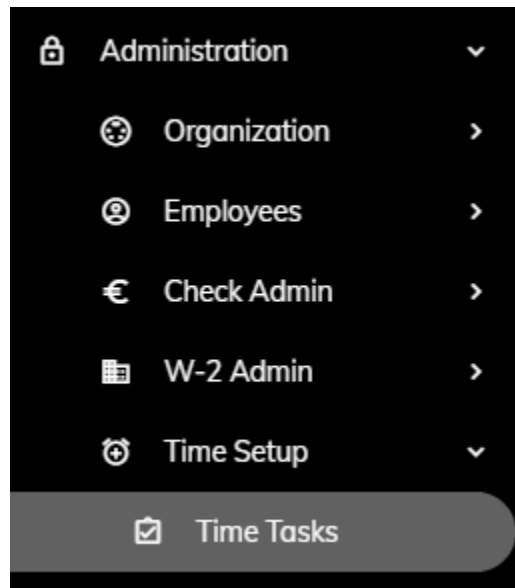
From the Upload W-2's popup, the Site Administrator will enter the year for the W-2s that will be uploaded. The Send Notifications box is checked by default and will allow you to select when the W-2s will be viewable on the site and when an email notification will be sent to any employee that has a W-2 uploaded for that year. You can set the Notification Send Date (and time); W-2s are not viewable until that time and the email notification is not sent until that date and time. Press Upload W-2s to send the request to the server for the upload.





## Time Setup

### Time Tasks



Tasks are set up by clicking the New button OR by Copying an existing Time Task and renaming/modifying.

**Task Name:** A name is provided to the Time Task; this name does not have to match the pay code names in Payroll.

**Pay Code:** The pay code is tied to the Time Task; one pay code may be tied to multiple Time Tasks. Note: If the employee does not have the pay code on their employee record in Caselle, they will not see this time task in their time entry template.

**Subject to Time Clock:** this box will indicate that this pay code represents time worked and will require the hours to balance to the start and end time for the day if the employee is subject to time clock entry (it is a good practice to check this for any task related to time worked).

**Require Note:** this box will require employee to enter a note when entering their time towards this time task.

**Leave Time:** this box allows the site to update leave balances for this task and shows the employees their balances based on the pay code (if this box is checked, the Subject to Time Clock box should not be checked).

**Accrued Leave Time:** this box should only be checked if this task will be used to record comp time earned. If checked the modifier should be populated so the time is added to the comp time bank correctly in Payroll; 150 will add the time entered by the employee at a rate of 1.50 (so 1 hour recorded by the employee will result in 1.5 hours being added to the comp time bank).



Tasks

NEW

COPY

Search for a task

Admin Time Worked

Ball Diamond Prep

Case Work

Collection System

Comp

**Comp Time Earned - Streets**

Comp Time Earned - Water

Comp Time Pay

Comp Time Pay Earned

Comp Time Used

Comp Time Used - Streets

Task Name

Comp Time Earned - Streets

26 / 100

Pay Code

9-2 (Comp Time Pay - Streets)

☐ Subject To Time Clock  
☐ Require Note  
☒ Leave Time  
☒ Accrued Leave  
☐ Applies To Overtime Calculation

Modifier

150

Pay Rate

Enter a pay rate

Allowed Negative Hours

0

Category

Category

+

Account

Percentage

SAVE TASK

DELETE TASK

Synchronization Routines

UPDATE PAYCODES

UPDATE EMP CODES

UPDATE GL ACCOUNT

UPDATE GL ACTIVITIES

**Applies to Overtime Calculation:** this box should only be selected if that task is used to calculate overtime. If selected, the system will look at the overtime rules setup in the time entry template to determine the total calculated hours of overtime. For example, if overtime is considered anything worked over 8 hours in a day or anything worked over 40 hours in week. Each time task that should be included in the calculation of overtime needs to have this box checked. **DO NOT SET THESE ON OVERTIME PAY CODES.**

**The Pay Rate field** can be left blank. If left blank, the Payroll system will use the employee and pay code settings. You can also override the employee or pay code settings by entering a specific pay rate for a task (this is common for tasks that are broken out like recreation: lifeguarding, swim instructors or public works: street sweeping, plowing etc).

**Category:** this field can be left blank. If populated all time tasks entered with the same category will get grouped together for easier selection and reporting.

**The General Ledger field** can be left blank. If left blank, the Payroll system will use the employee and pay code settings. You can also override the employee or pay code settings by entering a specific GL for a task. If desired to populate, select the **+** to add accounts. Accounts should be entered, and a percentage of amounts should be allocated to the account/s. If only 1 account is chosen, select 100%. If more than 1 account is chosen, select the appropriate distribution per account. Totals must equal 100%.



Tasks

NEW

COPY

Admin Time Worked

**Ball Diamond Prep**

Case Work

Collection System

Comp

Comp Time Earned - Streets

Comp Time Earned - Water

Comp Time Pay

Comp Time Pay Earned

Comp Time Used

Comp Time Used - Streets

Comp Time Used - Water

Task Name

Ball Diamond Prep

17 / 100

Pay Code

1-0 (Regular Pay)

☒ Subject To Time Clock
 ☒ Require Note
 ☐ Leave Time
 ☐ Accrued Leave
 ☐ Applies To Overtime Calculation

Pay Rate

Enter a pay rate

Category

Parks

+

Account

Percentage

No data

SAVE TASK

DELETE TASK

Synchronization Routines

UPDATE PAYCODES

UPDATE EMP CODES

UPDATE GL ACCOUNT

UPDATE GL ACTIVITIES

## Time Entry Templates

Administration

Organization

Employees

Check Admin

W-2 Admin

Time Setup

Time Tasks

Time Entry Templates

Time Entry Templates connect the time tasks and the approval groups along with setting deadlines for submitting and approving time. To create a Time Entry Template, click the New button and name the template.



NEW COPY

Time Entry Templates

ADVANCE PAY PERIODS

SAVE TEMPLATE

SHORT TERM SAVE

DELETE TEMPLATE

Fire

Jason Harrison Time Entry Admin

Monica

Police

Practice

Public Works

Public Works Time Entry

Public Works Time Punch

Symposium

Symposium No Time Clock - KG

Symposium Time Clock - KG

Symposium Time Punch - KG

Water

Template Name

Public Works

12 / 100

General Steps Tasks Caselle Activities

Current Pay Period

08/08/2021-08/21/2021

Current Approval Pay Period

08/08/2021-08/21/2021

Group who can enter time for template members

Jacob Smith Admin Group

Pay Period Settings

Period Numbers (Separate with a )

1:2:3

Type

BiWeekly

☐ Time Entry Days Based On Pay Period

Time Entry Days

14

Start Day of Week

Sunday

Time Clock System

Time In / Out Entry or Punch In / Out

Time Clock System

No Time Clock

Time Clock Interval

15

Overtime

Overtime prompt options

Overtime Hours Prompt

Overtime Hour Calculation Type

Daily

Overtime Task

Select a task

☐ Restrict Reversal Tasks to Tasks Used

Send Email if No Time

Number of days before/after pay period close

Send Email (No Time) Days

400

Time

07:00 AM

Employees

Number of days before/after pay period close. This will also send approvers an e-mail notifying employee timesheets are ready

☒ Auto Approve

☒ Use Cutoffs

☐ Disable Hours In Standard Entries

Standard Pay Period Hours

80

Allowed Negative Hours

0

Auto Approve Time (Days)

400

Time

07:00 AM

Approvers

Number of days before/after pay period close

☒ Send Change Notification When Approver Changes Time

Lock Approval (Days)

400

Time

07:00 AM

## GENERAL TAB

**Current Pay Period and the Current Approval Pay Period:** Use the drop down to set the to the current Pay period & the Current Approval Pay Period. Once these are set to the current pay period they will update automatically based on the “Use Cutoffs setting selected in the “Employees” section. If “Use Cutoffs” is selected, pay periods will update automatically once the date/time has arrived (in example shown, 400 days after pay period close and at 7:00 AM). If “Use Cutoffs” is not selected, the templates current pay period and



current approval pay period dates will need to be updated manually when ready by selecting the “Advance Pay Periods” menu option. You can update multiple time entry templates at the same time by selecting the ones needed to be updated. If these dates are not updated employees and/or supervisors may not be able to enter and approve time.

**Group who can enter time for template members:** If a central department person will be entering time for others in the department, you can create a group for this person and populate this field with the appropriate Group. This field is not required.

### **Pay Period Settings:**

**Pay Period Numbers:** Next enter the pay period numbers that are used by this template with a semicolon separating the numbers (biweekly is normally 1;2;3)

**Type:** Select from the drop down the type of pay frequency employees using this template fall under (Quarterly, Monthly, Biweekly, Semimonthly).

**Time Entry Days:** This is the number of days that an employee will see at one time for entry; if you do not populate this the default is 7 days (one week).

**Start Day of Week:** Select from the drop down the day of the week the pay period starts.

### **Time Clock System:**

**Time Clock System:** There are 3 choices from the drop-down box:

1. **No Time Clock:** This is used to only record total hours worked without having to enter start/end times for each day.

2. **Time Clock Entry:** This is used to record both the total hours worked AND the start/end times for each day. Start and End times for each day will be manually entered by the employee. If choosing this option, the time tasks must be set to “Subject to Time Clock” for those tasks that require times in/out for the day.

3. **Punch In/Punch Out:** This is used to record both the total hours worked AND the start/end times for each day. Start and End times for each day will be automatically recorded by the system. If choosing this option, the time tasks must be set to “Subject to Time Clock” for those tasks that require times in/out for the day. An option box for Time Punch Settings will also be enabled:

**Track Punch Location:** If selected, Time Punch locations can be tracked to an IP address. You can also only allow specific IP Addresses to be used by entering the IP address information.

**Approvers Can Edit Punch:** If enabled, this option allows the approver to edit punch times in/out.

**Allow Punch Editing:** If enabled, this option allows the employee to edit punch times in/out.

**Time Punch Rounding Interval:** set to 15 minutes by default but can be adjusted if you require employees to log time in larger increments.



### Time Punch

Time Punch Settings

☐ Track Punch Location

Allowed IP Addresses

☐ Approvers Can Edit Punch

☐ Allow Punch Editing

Time Punch Rounding Interval

15 ▼

Time Clock Interval: Applies to the Time Clock Entry if selected, which is set to 15 minutes by default but can be adjusted if you require employees to log time in larger increments.

### Overtime:

If this option is selected, the system will use the settings in this section in conjunction with the time tasks that have been set to “Applies to Overtime Calculation” to detect whether an employee has overtime. The employee will have the option when prompted to reclass the overtime hours to a different time task.

Overtime Prompt options: Select from the dropdown the number of hours that employees will be prompted as being considered as overtime (i.e. 8 hours per day or 40 hours per week etc.)

Overtime Hour Calculation Type: Select from the dropdown either Daily or Weekly

Overtime Hour Calculation Start Day of Week: This is the day of the week that the system will start the calculation of overtime.

Overtime Task: Select the OT task code that the employee will be prompted to reclass overtime hours to once they have gone over the total number of hours worked at regular time (i.e. 8 hours per day or 40 hours per week etc.).

Restrict Reversal Tasks to Tasks Used: When enabled employees can only select tasks used during the pay period to reclass the overtime hours to when prompted.

### The Timing section is for notification and locking entry and approval.

**Send Email if No Time:** This option will control when an email is sent to employees who do not have at least the standard hours entered (see section for Employees). You will enter the number of days after the pay period ends (0 is the day the pay period ends and negative numbers will be days before the pay period ends) that the email should be sent and the time the email should be sent.



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## Employees:

**Auto Approve:** When enabled, employee timesheets will automatically be approved at the Auto Approve Time (Days). This approval is for the employee NOT the supervisor. Timesheet is approved for whatever hours are entered in the timesheet at that time.

**Use Cutoffs:** When enabled, pay periods will automatically advance forward at the time specified and employees will no longer be able to enter time for that period. Approvers are locked out at the Lock Approval Time.

**Disable Hours in Standard Entries:** When disabled, employees can enter standard tasks in their timesheets, however, will not be able to associate hours with days of the week.

**Standard Pay Period Hours:** Enter the number of hours typically entered for employees using this template. The site can email employees who have entered fewer hours than this standard.

**Allow negative hours:** This should be used if you will allow employees leave balances to go negative; you will enter (as a positive number) the maximum negative hours that an employee is allowed for their leave balance.

**Auto Approve Time (Days):** When Auto Approve option is enabled, employee timesheets will automatically be approved at the Auto Approve Time (Days) before/after pay period close date. This will control when an employee can no longer enter time for the pay period. You will enter the number of days after the pay period ends (0 is the day the pay period ends and negative numbers will be days before the pay period ends).

**Time:** When Auto Approve option is enabled, employee timesheets will automatically be approved at this Time before/after pay period close date.

## Approvers:

**Send Change Notification when Approver Changes Time:** when enabled, this box will send an email to employees if the approval group changes any time entries for the employee.

**Lock Approval (Days):** will control when a supervisor can no longer approve time for the pay period. You will enter the number of days after the pay period ends (0 is the day the pay period ends and negative numbers will be days before the pay period ends) that the supervisor approval should be locked. It is usually best to work backwards on these deadlines starting with when the payroll person needs to have the time for processing. Once approval has been locked any unapproved time can only be approved by members of the Payroll Group.

**Time:** this is the time that the supervisor approval should be locked.

## STEPS TAB

On the Steps tab, click the plus sign to add an Approval group. This is creating an approval process for the time entry. Name the Step; common names are Approval or Supervisor. Then select the group that will approve the time. Multiple steps for approval can be created; if multiple steps are used they should be added in the order of approval (first approval should be created first and then second approval etc).



Template Name

Public Works

12 / 100

General

Steps

Tasks

Caselle Activities

+

☐ Step Name

☐ Group

(All)

☐ Jacob Smith

Jacob Smith Admin Group

## TASKS TAB

On the Tasks tab in the Available Tasks tab, click to the left of each type of time task that employees for this template will enter time for (worked and leave time). Then click Add Selected. Tasks can be removed by clicking to the left of the task on the Template task tab and then clicking Delete Selected. Please note that if a template includes a task that is linked to a pay code that an employee does not have in Payroll, the employee will not see that task as an option.

General

Steps

Tasks

Caselle Activities

Available Tasks

☐ Name ↑

Collection System  
 Comp  
 Comp Time Pay  
 Disinfection  
 Filter Structures  
 Holiday  
 Lake Intake  
 Lift Station Equip  
 Lift Station Structures  
 Police Overtime  
 Police Sick

ADD SELECTED

Template Tasks

☐ Name ↑

Standard Entry

(All)

Comp Time Pay Earned  
 Comp Time Used  
 Comp Time Used - Streets  
 Comp Time Used - Water  
 Garage  
 Park Mowing  
 Public Health  
 Public Works Overtime  
 Public Works Regular Pay  
 Public Works Sick  
 Public Works Vacation

☐  
☐  
☒  
☐  
☐  
☐  
☒  
☒  
☐  
☐

DELETE SELECTED



## CASELLE ACTIVITIES TAB

On the Caselle Activities tab in the Available Activities tab, click to the left of each GL Activity that employees for this template will tie time to. Then click Add Selected. Activities can be removed by clicking to the left of the task on the Template task tab and then clicking Delete Selected. Click Save Template when finished.

General

Steps

Tasks

Caselle Activities

☐ All  
☐ Mask  
☒ Selected

### Available Activities

☐ Name

Activity Number

No data

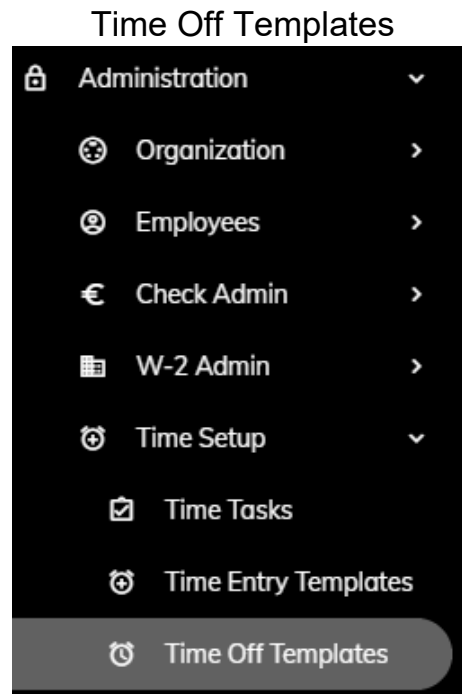
### Template Activities

☐ Name

Activity Number

St. Patrick's Day Parade	1
FEMA - 2013 Recovery	2
2012-2013 Snow Removal	3
Sidewalk Project Main St...	5
Capital Projects	10
Arena Maintenance	20
Arena Concessions	21
Main Street Reconstructi...	201501
107 N 9th Ave E	19147
222 12th Ave	19148



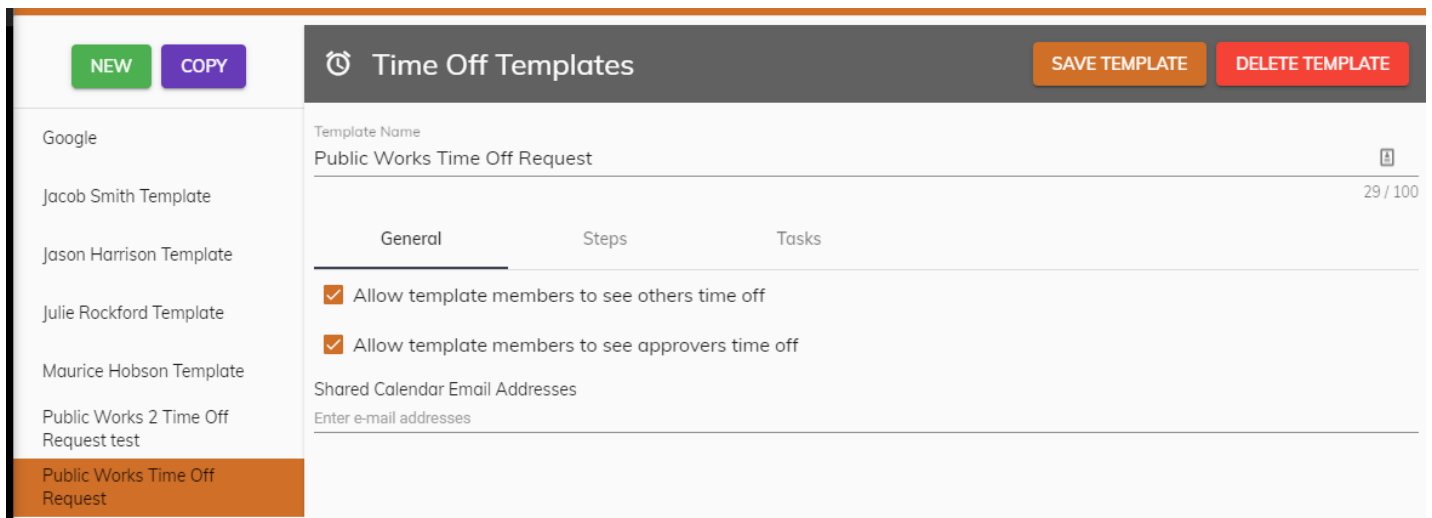


Time Off Templates connect the time off tasks and the approval groups. To create a Time Off Template, click the New button and name the template.

## GENERAL TAB

Check the box to Allow template members to see others and/or approvers time off if you want to allow employees to see when other similar employees or their supervisor have time off.

The Shared Calendar Email Address field allows you to have all time off appointments show on a single email calendar that you may have shared out with your employees.



NEW COPY

Time Off Templates
SAVE TEMPLATE DELETE TEMPLATE

Template Name
Public Works Time Off Request
29 / 100

General Steps Tasks


☒ Allow template members to see others time off
 ☒ Allow template members to see approvers time off
 Shared Calendar Email Addresses
 Enter e-mail addresses

28



## STEPS TAB

On the Steps tab, click the plus sign to add an Approval group. This is creating an approval process for the time off request. Name the Step; common names are Approval or Supervisor. Then select the group that will approve the time. You can check the box to Send Time Off Appointments or Send Request Added Emails. The Send Time Off Appointments box will send a calendar appointment to the members of the approval group and the Send Request Added Emails will send an email to members of the approval group each time a request is submitted. Multiple steps for approval can be created; if multiple steps are used, they should be added in the order of approval (first approval should be created first and then second approval etc).


**Time Off Templates**
SAVE TEMPLATE
DELETE TEMPLATE

Template Name  
 Public Works Time Off Request

29 / 100

General
 **Steps**
 Tasks

+

<input type="checkbox"/> Step Name	Group	Send Time Off Appoint...	Send Request Added E...
🔍	(All)	(All)	(All)
⋮ Supervisor	Jacob Smith Admin Group	✓	✓

## TASKS TAB

On the Tasks tab in the Available Tasks tab, click to the left of each type of time task that employees for this approval group will request off. Then click Add Selected. Tasks can be removed by clicking to the left of the task on the Template task tab and then clicking Delete Selected. Click Save Template when finished. Please note that if a template includes a task that is linked to a pay code that an employee does not have in payroll, the employee will not see that task as an option.



## Public Works Time Off Request



29 / 100

General

Steps

Tasks

### Available Tasks

☐ Name ▾



Vacation

Sick

Holiday

Comp

Vacation Pay

Comp Time Pay

Sick Leave

Regular Pay

Garage

Public Works Overtime

Public Works Regular Pay

ADD SELECTED

### Template Tasks

☐ Name ▾

Standard Off ▾



Public Works Vacation

Public Works Sick

Comp Time Used

Comp Time Used - Streets

Comp Time Used - Water

DELETE SELECTED