Labor Management

Application User Training

Version 24.x
Last Modified 24.1 | April 2024

Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: https://community.assetworks.com/hc/en-us

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Contents

Labor Management Manual

Setup work is required prior to employees charging labor in M5, whether it is indirect such as shop cleaning or direct such as replacing brakes on a unit. This includes reviewing system flags related to labor processing and setting up the codes required to meet the user's business processes.

Payroll Time Type setup

The *Payroll Time Types* frame is used to define the various time types that are used for recording labor or payroll processing. The various pay scales are user-defined in the **Description** field of the *Time Type Information* i-frame (for example, regular time, overtime, double-time).

Only one default can be selected on the *Time Type Matrix* frame. Most companies select the code that relates to *Regular Time* as the base pay.

Setup Payroll Time Types

From the Payroll Time Types frame:

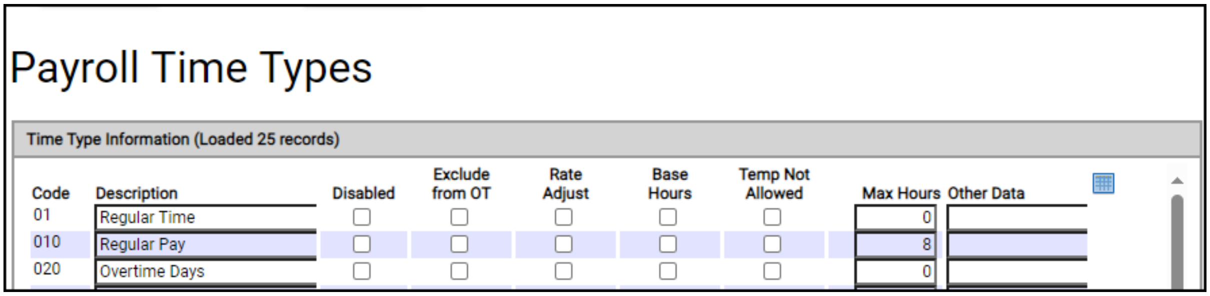
1. Select a blank **Code** field.
2. Enter a new time type **Code**. Limited to three characters.
3. Press *Tab*.
4. Enter a time type **Description**. Limited to 20 characters.
   For example, **OT** = Overtime.
5. Select the **Disabled**, **Exclude from OT**, **Rate Adjust**, **Base Hours**, or **Temp Not Allowed** checkbox, as applicable.
6. Enter **Max Hours** for the time type, as applicable.
7. Enter **Other Data**, as applicable. Free form field limited to 20 characters.
8. Select **SAVE** to setup the new time type code.

Delete Payroll Time Types

From the Payroll Time Types frame:

1. Select the **Code** that you want to delete.
2. Select **DELETE** and then select **SAVE** to delete the code.

Note: You cannot delete a time type that has been posted to the payroll table by the *Payroll Labor Approval* frame.



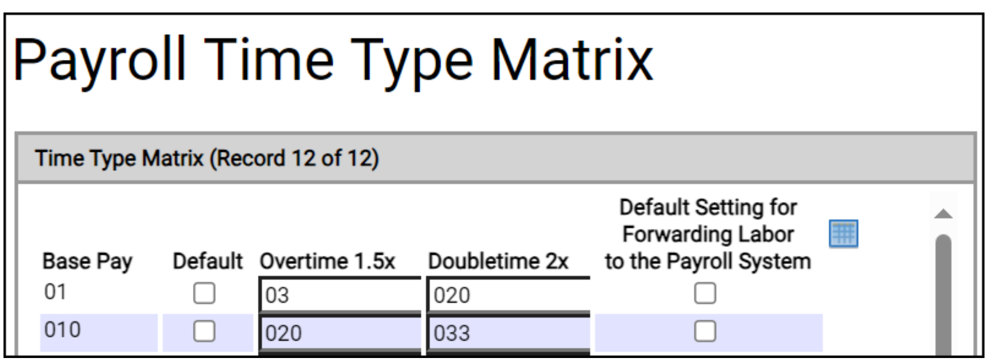
Payroll Time Type Matrix setup

The *Payroll Time Type Matrix* frame defines the various pay scales your company would have available throughout the shifts. The various pay scales are defined by the user in *Payroll Time Types* (for example, Regular Time). The *Time Type Matrix* i-frame is used to determine which of these types would be the preferred default. Only one default can be selected. Most companies select the code that relates to *Regular Time* as the base pay.

Setup a Payroll Time Type Matrix

From the Payroll Time Type Matrix frame:

1. Select a blank **Base Pay** field.
2. Enter a new **Base Type** code or select from the Time Type Codes List.
3. Press *Tab*.
4. Select the **Default** checkbox if the code is the default time type.
5. Enter a valid time type or select from the Time Type Codes List in the **Overtime 1.5x** field.
6. Enter a valid time type or select from the Time Type Codes List in the **Doubletime 2x** field.
7. Select the **Default Setting for Forwarding Labor to the Payroll System** checkbox to set the time type as the default for the payroll system.
8. Select **SAVE** to setup the time type matrix code.



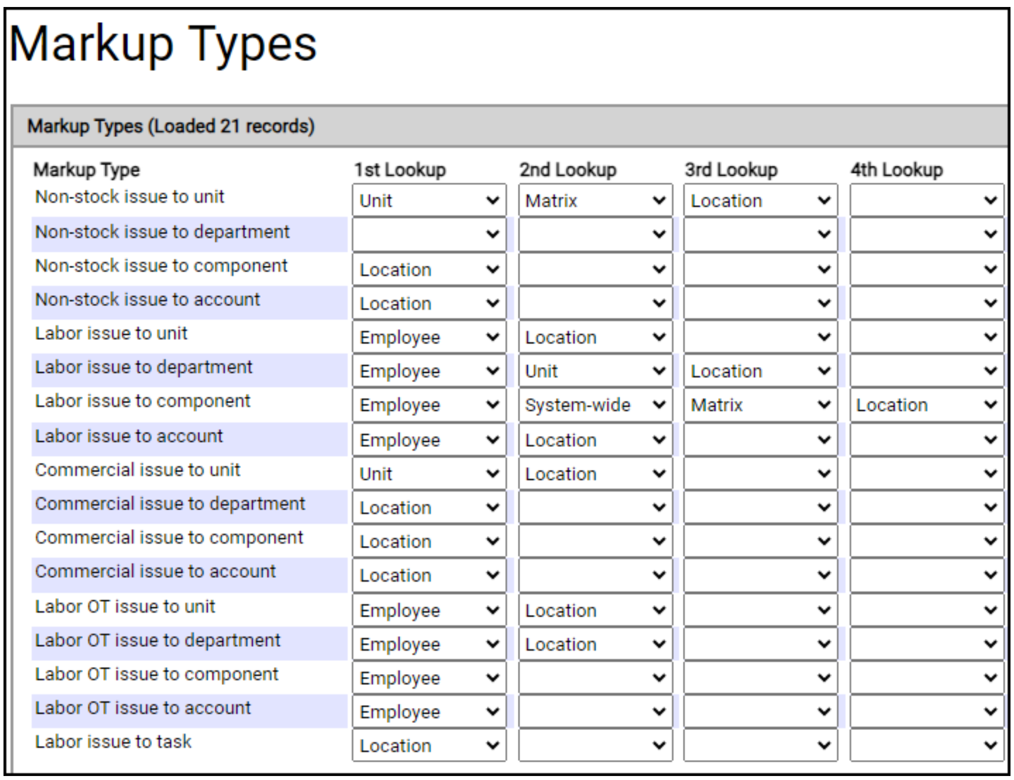
Labor Rate setup

One of the first decisions to be made in M5 is the rate method to use for charging labor. Various options are available and require setup using the *Markup Type* and *Markup Scheme* frames.

Within *Markup Types* you can select to calculate a standard and overtime labor rate by:

- Employee
- Location
- Unit
- Department Hierarchy
- Matrix
- System-wide default

Refer to the *Jump Start Guide – M5 System Management Overview* for more information for the setup of Mark-Up Types and Mark-Up Schemes.

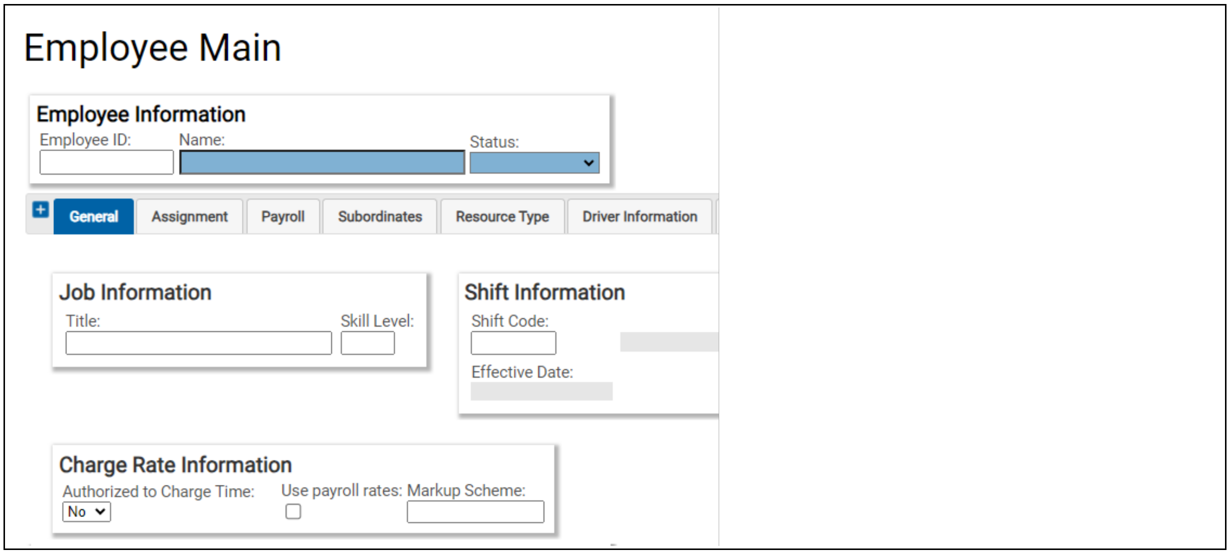


Markup Types

Markup Types (Loaded 21 records)

Markup Type	1st Lookup	2nd Lookup	3rd Lookup	4th Lookup
Non-stock issue to unit	Unit	Matrix	Location	
Non-stock issue to department				
Non-stock issue to component	Location			
Non-stock issue to account	Location			
Labor issue to unit	Employee	Location		
Labor issue to department	Employee	Unit	Location	
Labor issue to component	Employee	System-wide	Matrix	Location
Labor issue to account	Employee	Location		
Commercial issue to unit	Unit	Location		
Commercial issue to department	Location			
Commercial issue to component	Location			
Commercial issue to account	Location			
Labor OT issue to unit	Employee	Location		
Labor OT issue to department	Employee	Location		
Labor OT issue to component	Employee			
Labor OT issue to account	Employee			
Labor issue to task	Location			

If you opt to use payroll rates, this requires you to set up pay steps and pay classes that are entered on the **Payroll** tab within the *Employee Main* frame. You also need to select the **Use Payroll Rates** checkbox within the *Employee Main* frame on the **General** tab.



There are other labor reporting parameters to be defined, such as payroll time reporting and rounding, labor charge time type and minimums within the *Location Main* frame.

Define Labor Parameters

From the *Location Main* frame:

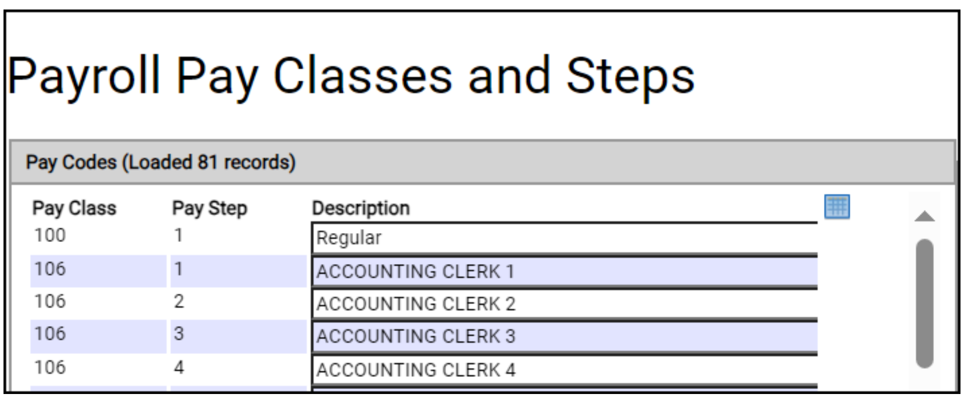
1. Enter a valid **General Location** or select from the General Location List.
2. Press *Tab*. The **Markup Scheme** is located on the *General Information* tab.
3. Select the *Maintenance* tab. Select the **Maintenance Location** checkbox to set the location as a maintenance location.
4. In the *Payroll* section, select from the dropdown menu:
    - **Time Reporting**. (for example, Minutes).
    - **Time Rounding** (for example, 1 hour).
    - **Unpaid Breaks to Payroll**, select *Yes* or *No*.

   Note: When you open the *Payroll Labor Approval* frame at this login location, the payroll time rounding is used for all employee payroll records for a given supervisor. Payroll is not rounded when a timekeeper uses the *Payroll Labor Approval* frame.
5. In the *Labor Charge* section:
    - Enter a valid **Time Type** or use the Time Type Matrix (Base Pay) List) if you want the default time type to be set at the location level.
    - Enter a **Minimum** labor charge. The minimum labor charge is used for informational purposes only.

6. In the *Bar Code Authorization* section, select the **Labor Entry** checkbox. If **Labor Entry** is selected, barcode entry of labor charges is available.
7. Select **SAVE** to save the labor parameters.

Payroll Pay Classes & Steps setup

If the labor rate method selected is payroll, the **Pay Class** and **Pay Step** must be established and assigned to each employee.



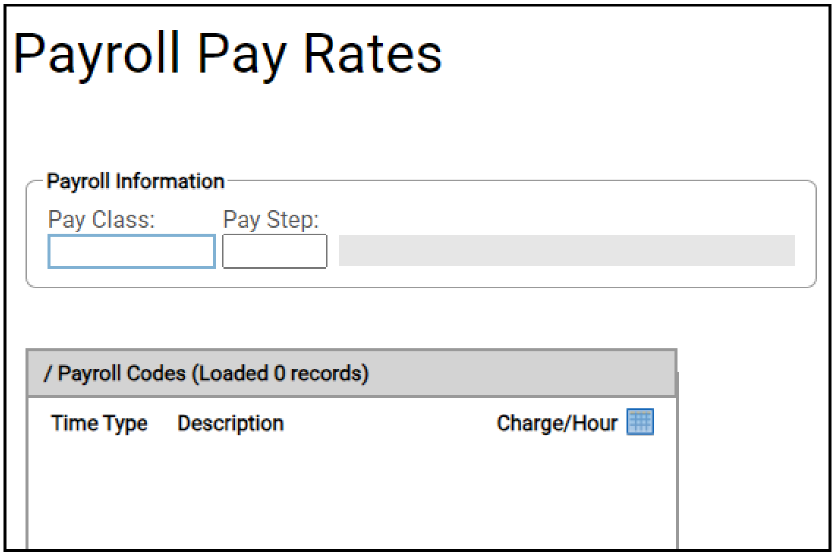
Payroll Pay Classes and Steps

Pay Codes (Loaded 81 records)

Pay Class	Pay Step	Description
100	1	Regular
106	1	ACCOUNTING CLERK 1
106	2	ACCOUNTING CLERK 2
106	3	ACCOUNTING CLERK 3
106	4	ACCOUNTING CLERK 4

Payroll Pay Rates setup

In addition to setting up the **Pay Classes** and **Pay Steps**, the charge per hour for each **Time Type** can be set up.



Shift Code setup

Shifts are defined for employees and non-employee shifts. They indicate the working or operational hours of the entity or employee. A single shift can work for all three, such as, an employee shift is from 6 am to 4 pm, a unit operates from 6am to 4pm and a location is open from 6 am to 4 pm.

The *Shift Maintenance* frame is used to set up shifts that describe when an employee works, such as when a maintenance location is open or when units are in-service. The shift code describes start and stop times for each day of the week for the shift. The shift parameters accommodate weekends, spilt shifts and rotating shifts. Shift codes must be entered with a numeric value.

Paid and non-paid breaks are also maintained. The system does not automatically check employees out of their current jobs at their break times or check the employee back in on the clock when the break is over. When non-break time (direct or indirect labor time) is charged during the break time and the employee logs out of the non-break time, the break time is subtracted from the non-break time. Time accumulated during paid breaks is automatically credited to a break indirect account and forwarded to payroll. For example, an employee is working on a car from 11:00 to 14:00 and is scheduled for a paid break at 13:15-13:25. When the employee logs out of the job at 2:00pm, 2 hrs 50 minutes will be charged to the work order and 10 minutes will be charged as a paid break.

The Break indirect account is set up at the time of installation. To change this indirect account, contact your AssetWorks Client Services representative.

The *Shift Information* i-frame displays the following fields:

- **Day #** – Denotes what position in the shift week the day falls. Shifts are created in seven day increments.
- **Payroll Day** – The approval day for the shifts work. It can be the shift start day or shift end day.
- **OT Start Day** – Day overtime starts.
- **OT Start Time** – Time when the overtime pay rate is applied.
- **Start Day** – Start day of the shift.
- **Start Time** – Time of day the shift begins.
- **End Day** – Day the shift ends.
- **End Time** – Time of day the shift ends.
- **Schedule Shift** – Shift type for shop planning purposes.
- **Pay Shift** – The shift's pay shift indicator (user-defined).If System Flag 5326 is set to **N**, the field is not validated. Refer to the *System Flags Table* for more information.

The time between Start Date/Time and End Date/Time is the shift duration. If your default time type on the *Payroll Time Type Matrix* for regular time is not equal to the overtime time type, regular time is considered by adding the shift length amount to the overtime start time. The time recorded after this amount of time is considered part of overtime. For example, the shift is from 7am-4pm, with overtime starting at 5am. An employee scans into his first job at 6:30am (regular time then ends at 3:30pm, nine hours later). If the employee scans out for the day at 4:01pm, then nine hours of regular time can be posted to payroll, with 31 minutes of overtime. If your default time type on the *Payroll Time Type Matrix* for regular time is equal to the overtime time type, you can make all time be considered regular time (9 hrs 31 minutes of regular time).

We recommend that you set the shift overtime time (set in the **Start** field) to at least two hours prior to the shift day's regular start time. This will guarantee that employees scan into a job prior to the official shift start time are paid on the correct payroll day.

Create a Shift

From the Shift Maintenance frame:

1. Enter a shift code in the **Number** field. Limited to a numeric character between 1 and 255. The *Action Required* window opens.
2. Select **Create** to create the shift code.
3. Enter a shift description in the field next to the **Number** field. Limited to 30 characters.

4. Select a **Type** from the dropdown menu (Employee or Non-Employee).
5. Enter the shift **Start Date**.
6. Select the number of minutes from the **Subtract** dropdown for planned absences, as applicable.

Shift Information i-frame

1. **Day # -** If the shift is the same amount of time for every day, you can enter 1 in the field and only set up one shift day. The system will then populate every day in the shift.
   If the first day in the cycle is a Monday, enter the date for the first Monday in your payroll cycle. The shift rows will populate from this date forward.
2. Select the **Payroll Day** from the dropdown menu. The payroll day can be shift start day or the shift end day. The payroll day is used to determine the approval day on the *Payroll Labor Approval* frame. If you are setting up a two or more week cycle, the payroll day on the last day of the cycle can be the first day of the next cycle.
3. From the dropdown select the:
   - OT Start Day
   - OT Start Time
   - Start Day
   - Start Time
   - End Day
   - End Time
4. Enter the **Schedule Shift**.
5. Enter the shift's **Pay Shift**.
6. Repeat steps, as applicable. The next day automatically displays based on the previous row.
7. If the system displays, "*This shift's end day and time cannot be later than the next overtime start (02-jan-2013). Would you like to set the next overtime start to 02-jan-2013?*", select **OK** to set the next day's overtime start time to the previous day shift end time.

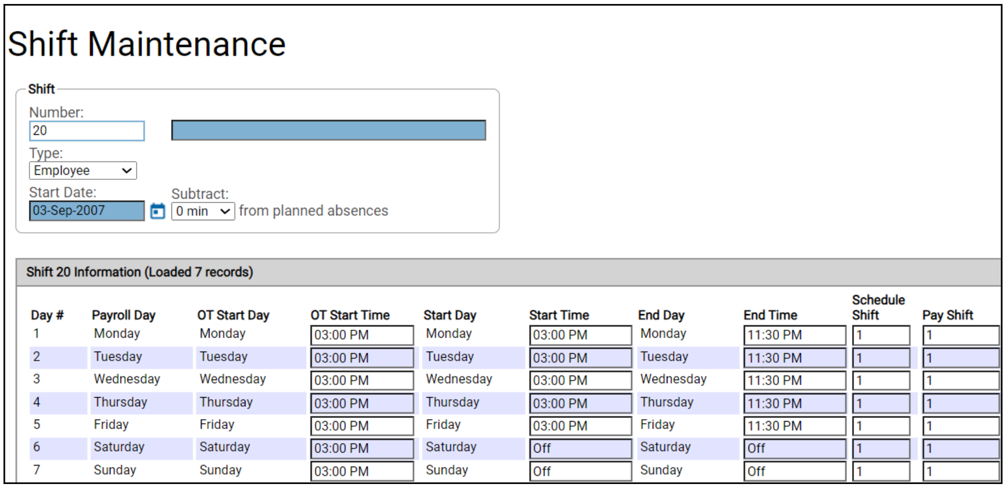
Delete a Shift

From the Shift Maintenance frame:

1. With shift code information displayed, select the **DELETE** icon on the menu.
2. The system displays the *Action Required* window.
3. Select the **Delete** button to confirm the deletion.

Note: The system checks for dependencies on the unit_dept_comp_main and emp_main tables. If the shift code exists within an employee record, the following message displays: "*Cannot delete shift code 2, it is in use on table Emp_main.*"

If the shift code is being used by a unit record, the following message displays: “*Cannot delete shift code 2, it is in use on table Unit_main.*”



Day #	Payroll Day	OT Start Day	OT Start Time	Start Day	Start Time	End Day	End Time	Schedule Shift	Pay Shift
1	Monday	Monday	03:00 PM	Monday	03:00 PM	Monday	11:30 PM	1	1
2	Tuesday	Tuesday	03:00 PM	Tuesday	03:00 PM	Tuesday	11:30 PM	1	1
3	Wednesday	Wednesday	03:00 PM	Wednesday	03:00 PM	Wednesday	11:30 PM	1	1
4	Thursday	Thursday	03:00 PM	Thursday	03:00 PM	Thursday	11:30 PM	1	1
5	Friday	Friday	03:00 PM	Friday	03:00 PM	Friday	11:30 PM	1	1
6	Saturday	Saturday	03:00 PM	Saturday	Off	Saturday	Off	1	1
7	Sunday	Sunday	03:00 PM	Sunday	Off	Sunday	Off	1	1

Shift Break Maintenance

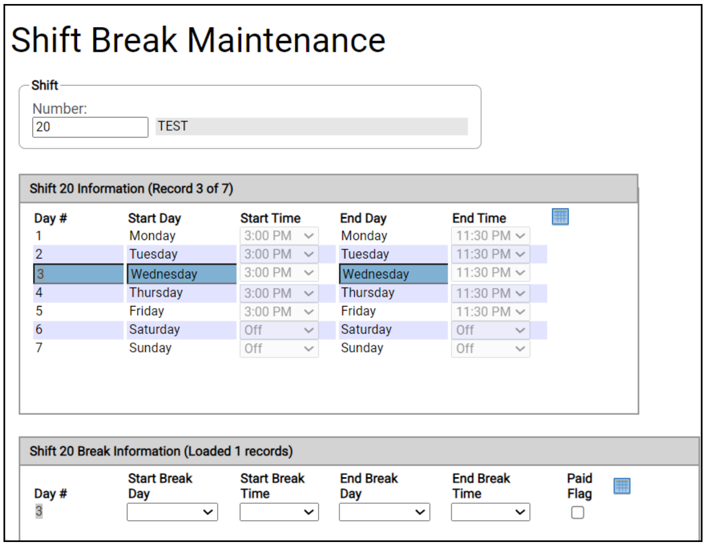
Add or Modify a Shift Break

Within the Shift Information i-frame:

- Select the **Day #** row to add or modify a shift break. The *Shift Break Information* i-frame displays.

Within the *Shift Break Information* i-frame:

1. Select a **Start Break Day** from the dropdown menu.
2. Select a **Start Break Time** from the dropdown menu.
3. Select an **End Break Day** from the dropdown menu.
4. Select an **End Break Time** from the dropdown menu.
5. If this is a paid break, select the **Paid Flag** checkbox.
6. Select **SAVE** to save the shift break information.



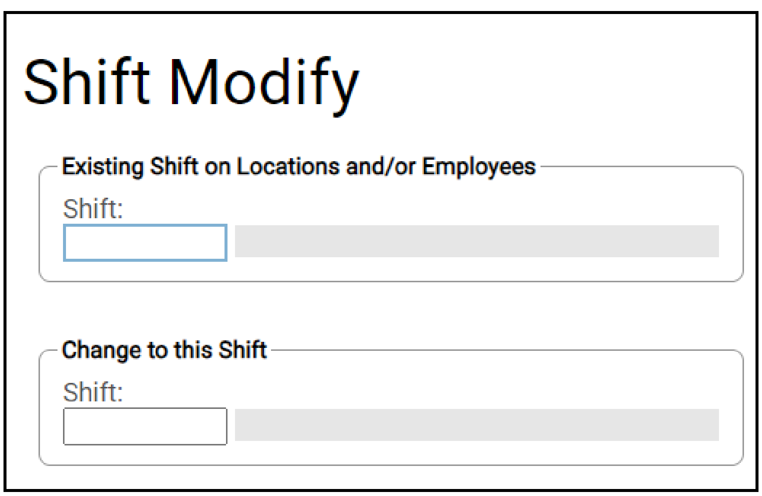
Shift Change / Modify

You can change an existing shift number assigned to a group of locations or employees to a different shift number that exists on *Shift Maintenance*. You can also change a unit shift provided you are swapping it with another non-employee type shift.

Modify a Shift

From the Shift Modify frame:

1. Within *Existing Shift on Locations and/or Employees*, enter a valid **Shift** or select from the Shift Codes List.
2. Within *Change to this Shift*, enter a valid **Shift** or select from the Shift Codes List.
3. Select **SAVE** to modify the shift.



Indirect Account Codes setup

The *Indirect Account Codes* frame is used to set up accounts for capturing time and expenses which cannot be charged to work order jobs. For example, non-billable items such as sweeping a shop floor or attending a training class may be posted to an indirect account.

The frame also defines a base time type for each indirect code, an indirect account code's informational code and the direct account number associated to the indirect account number. There is no default informational code as it is user-defined for informational purposes. If no code is entered, no informational code is displayed for the payroll information on the Work Order Labor Approval.

Create an Indirect Account Code

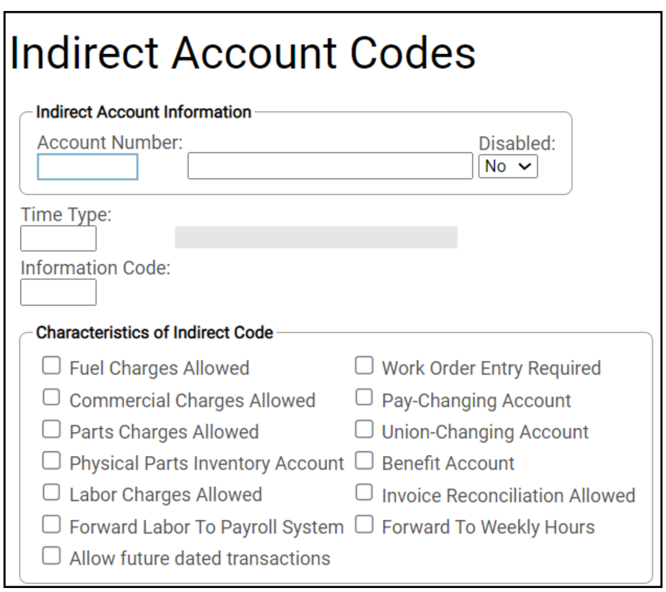
From the Indirect Account Codes frame:

1. Enter a new **Account Number** and press **Enter**. Limited to five characters. The *Action Required* window opens.
2. Select **Create** to create the new indirect account.
3. Enter an indirect account code description. Press **Enter**.
4. Enter a valid **Time Type** to associate to the indirect account code or select from the Time Type Matrix (Base Pay) List. The codes are setup and maintained on the *Time Types* frame and used to define the time charges associated with the Indirect Account Codes.
5. Enter a user-defined **Information Code**.
6. Within the **Characteristics of Indirect Code**, select characteristics to define the type of charges and activities allowed on the Indirect Account. Select the following that apply:

    - **Fuel Charges Allowed** - Select this option to see if the indirect account is allowed to be used for Fuel charges.
    - **Commercial Charges Allowed** - Select this option if the indirect account is allowed to be used for a Commercial charge.
    - **Parts Charges Allowed** - Select this option if the indirect account is allowed to be used for a Part charge.
    - **Physical Parts Inventory Account** - Select this option if the indirect account is to be used when reconciling a physical inventory count.
    - **Labor Charges Allowed** - Select this option if the indirect account is allowed to be used for Labor.

- **Forward Labor to Payroll System** - Select this option if the indirect account is to be used to post to the payroll table and displayed for the timekeeper to approve on the *Payroll Approval* frame. **Note:** You must select **Labor Charges Allowed** if you select **the Forward Labor to Payroll System** checkbox.
- **Allow future dated transactions** - Select this option if the indirect account allows future dated transactions.
- **Work Order Entry Required** - Select this option if the indirect account can be applied to a work order job.
- **Pay-Changing Account** - Select if you want to be able to change an employee's pay-step when charging labor. If the **Pay-changing account?** checkbox is selected in the field, along with entering a work order number and job code, you must change an employee's pay class (pay step is optional).
- **Union-Changing Account** - Select this option if you want to be able to change an employee's union code when charging labor.
- **Benefit Account** - Select this option if you want debits and credits to be accumulated as benefit time. **Note:** Holidays, sick leave, or military leave can be considered a benefit by some organizations and tracked to a separate account number.
- **Invoice Reconciliation Allowed** - Select this option if you want to use the code when performing invoice reconciliation.
- **Forward to Weekly Hours** - Works with System Flag 5272 - "Period of Time to Calculate OT, -D)aily, or W)eekly, S(hift)."

7. Select **SAVE** to save the indirect account code information.



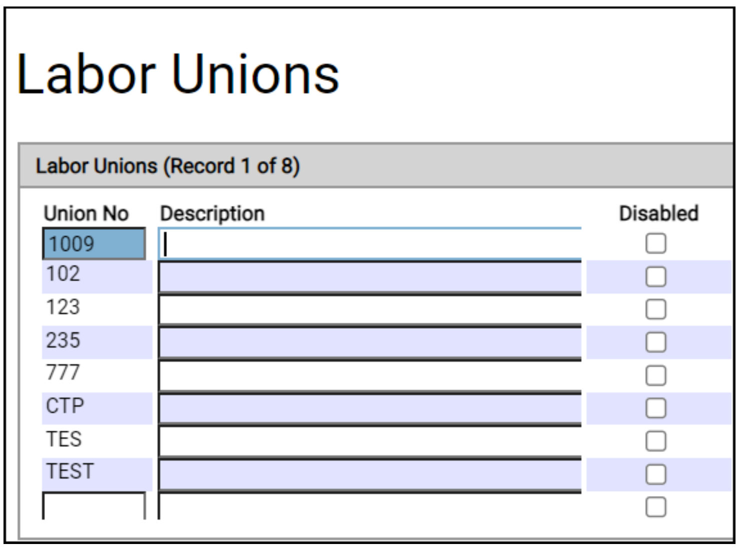
Defining Union Codes

The *Labor Unions* frame can be used to add, update, delete, or disable union codes to identify different labor unions that employees in your workforce might belong to.

Add a new Labor Union

From the Labor Union frame:

1. Select a blank **Union No** field.
2. Enter a new **Union No**. Limited to four characters.
3. Enter a **Description** of the labor union.
4. Select the **Disabled** checkbox, as applicable.
5. Select **SAVE** to save the union number.



Employee Main

Adding Employee Information

From the Employee Main frame:

1. Enter a new **Employee ID** field. The *Action Required* window opens.
2. Select **Create** to create the new employee ID.
3. Select *ACTIVE* from the **Status** dropdown.

General tab

Job Information

- Enter a user-defined job **Title**.
- Enter a user-defined **Skill Level**.

Shift Information

If System Flag 1061 is set to **Y** a shift code is required. Enter a valid **Shift Code** or select from the Employee Shift Codes List.

Charge Rate Information

- **Authorized to Charge Time** – If an employee is authorized to charge time, select *Yes* from the dropdown.
- **Use payroll rates** – If labor charged to a work order is based on pay class and pay step criteria.
- **Markup Scheme** – Enter markup scheme if applicable to calculate employee labor charges.

Allow Request Parts for Issue to

Select the checkboxes which apply to the employee.

- Unit
- Work Order
- Indirect Acct
- Direct Acct
- Department

Can they issue parts on PART ISSUE or WORK ORDER MAIN? This is only applicable if System Flag 5223 - “Capture Employee Technician Number and PIN on Part Issue? (Y/N)” is set to **Y**. If set to **Y**, then the employee must be designated as either a technician or a supervisor.

Additional Information

1. Enter the employee’s **Start Date**.
2. Enter the employee’s **Termination Date** if the employee is no longer employed.
3. Enter the employee’s **Phone** number.
4. Enter the employee’s **Email** address.
5. Enter the employee's **Pin**, if applicable. Required if System Flag 5223 or 5009 (Use employee PIN on Labor Wedge) is set to **Y**.

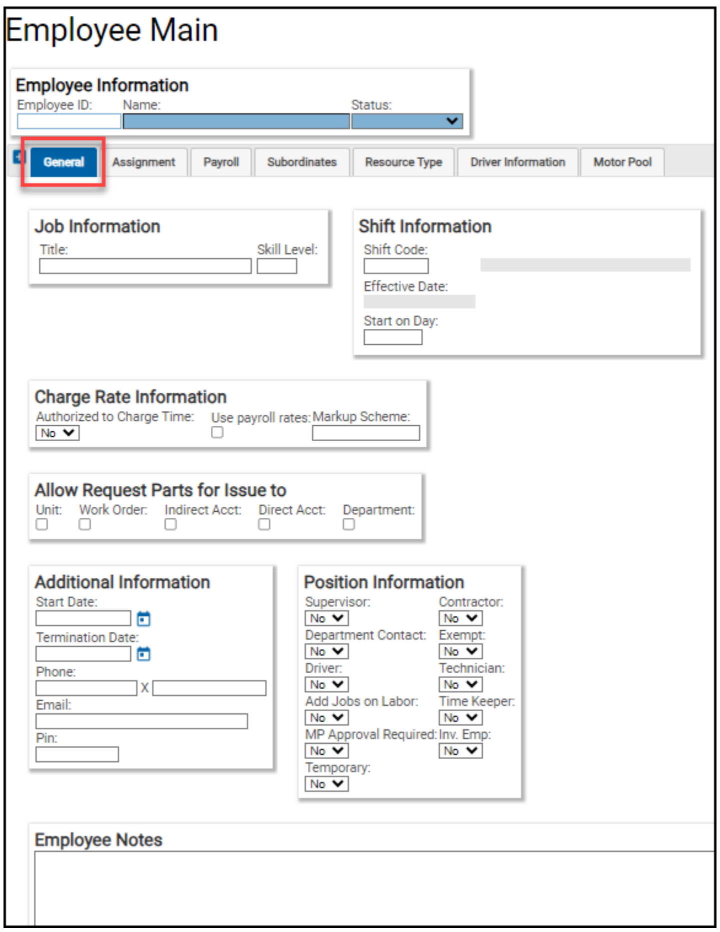
Position Information

Supervisor – Select *Yes* if the employee is a supervisor.
Department Contact – Select *Yes* if the employee is a department contact.
Driver – Select *Yes* if the employee is the valid driver.

Add Jobs on Labor – Select *Yes* if the employee can add jobs to a work order.
MP Approval Required – Select *Yes* if the employee is required to have their motor pool reservation request approved by an authorized motor pool approver.
Temporary – Select *Yes* if the employee is a temporary employee.
Contractor – Select *Yes* if the employee is a contractor.
Exempt – Select *Yes* if the employee is an exempt employee.
Technician – Select *Yes* if the employee is a technician. Refer to System Flag 5223.
Time Keeper – Select *Yes* if the employee can review and approve payroll records already approved by a supervisor on the *Payroll Labor Approval* frame.
Inv. Emp – Select *Yes* if the employee can be entered in the employee field when issuing parts.

Employee Notes

Free form field to enter notes related to the employee.



Assignment tab

The **Assignment** tab contains general information about the employee's Supervisor, Home Location, Department, Vendor, and Union.

Supervisor ID – Enter a valid **Supervisor ID** or select from the Active Supervisor List.
Note: You can add Additional Supervisors on the *Screen Designer* frame.

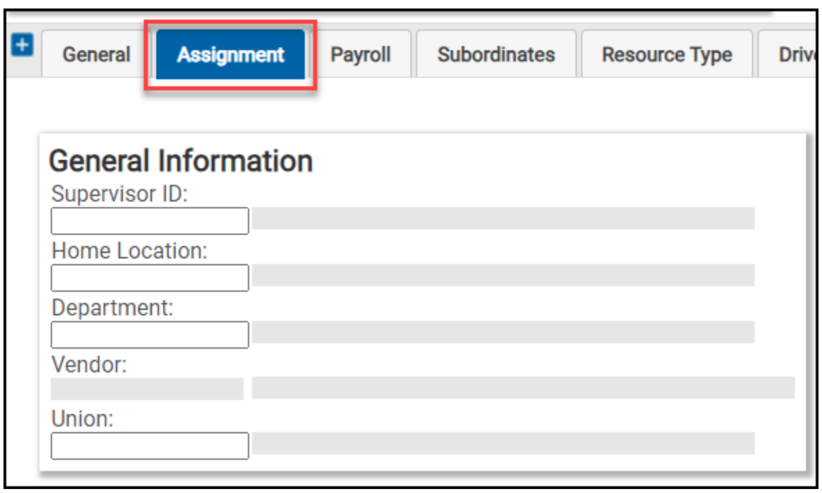
Home Location – Enter the employee's **Home Location** or select from the General Location List. This is a required field.

Department – Enter a valid **Department** number or select from the Department List.

Department Group – The field only displays by using a screen designed version of Employee Main.

Vendor – If the employee is designated as a contractor, you must enter a valid **Vendor** or select from the Active Vendor List. The field only displays if the **Contractor** is *Yes* on the **General** tab.

Union – If the employee is a member of a labor union, enter the **Union** number or select from the Union LOV. If System Flag 5325 is set to **Y**, the field is required.



Payroll tab

The **Payroll** tab is used if the rate method for charging labor is a payroll rate.

Pay Definition Table

1. Enter the employee's **Primary**, **Secondary** and **Tertiary** pay class in the *Pay Class* column.
2. Enter the employee's **Primary**, **Secondary** and **Tertiary** pay step in the *Pay Step* column. The pay step identifies the increment of pay employees within their pay class.

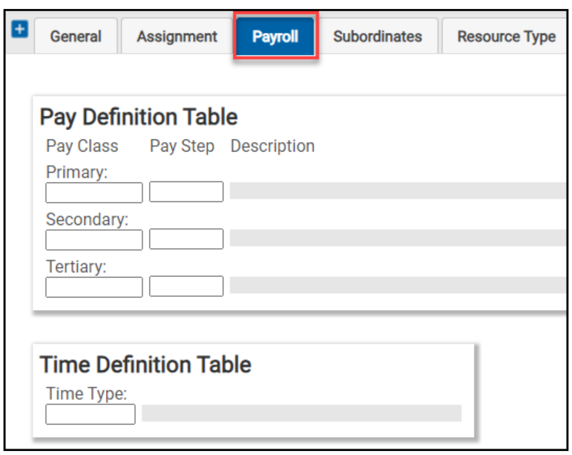
The **Description** automatically displays when you enter a pay class and pay step combination.

When entering a pay step or pay class on the *Labor Wedge* frame for relief work, the pay step or pay class will be validated against the fields in *Employee Main*, if System Flag 1213 "Validate pay class only labor charges" is set to **Y**.

Time Definition Table

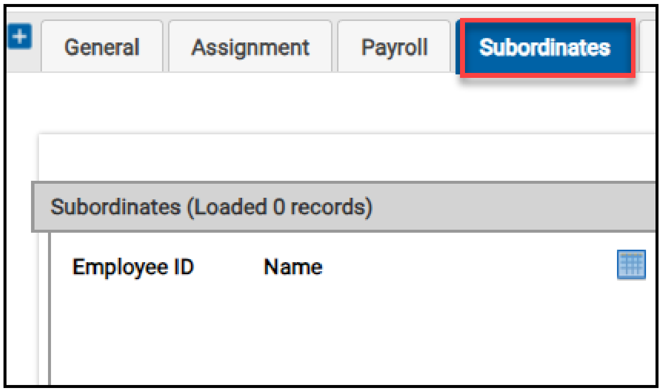
Enter a valid **Time Type** or select from the Time Type Matrix (Base Pay) List to set the employee's default time. The default time type is used when approving labor.

Only enter a time type in this field if you want the employee making charges to be paid at a premium rate depending on an employee specific time type.



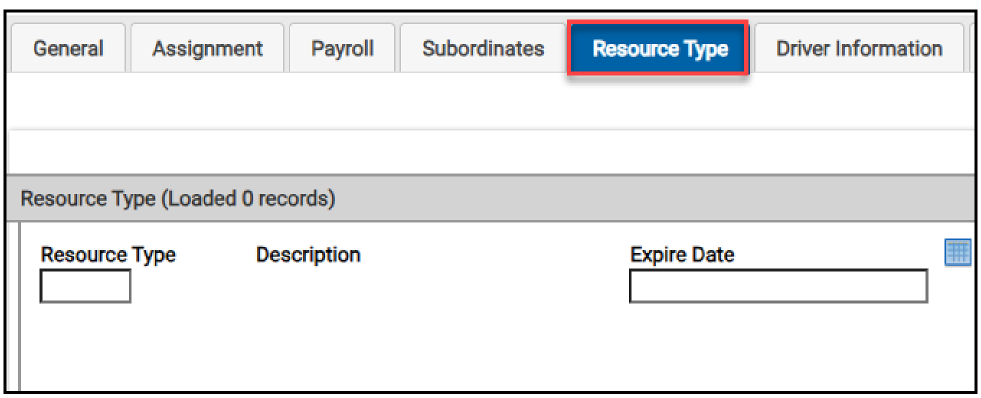
Subordinates tab

The **Subordinates** tab displays the **Employee ID** and **Name** of the employee's subordinates. The employee must be designated as a supervisor.



Resource Type tab

If you are assigning jobs by resource type (refer to System Flag 5233), enter the **Resource Type**, **Description**, and **Expire Date**. An employee can have more than one resource type assigned to them. This is a part of the *Shop Planning* module.

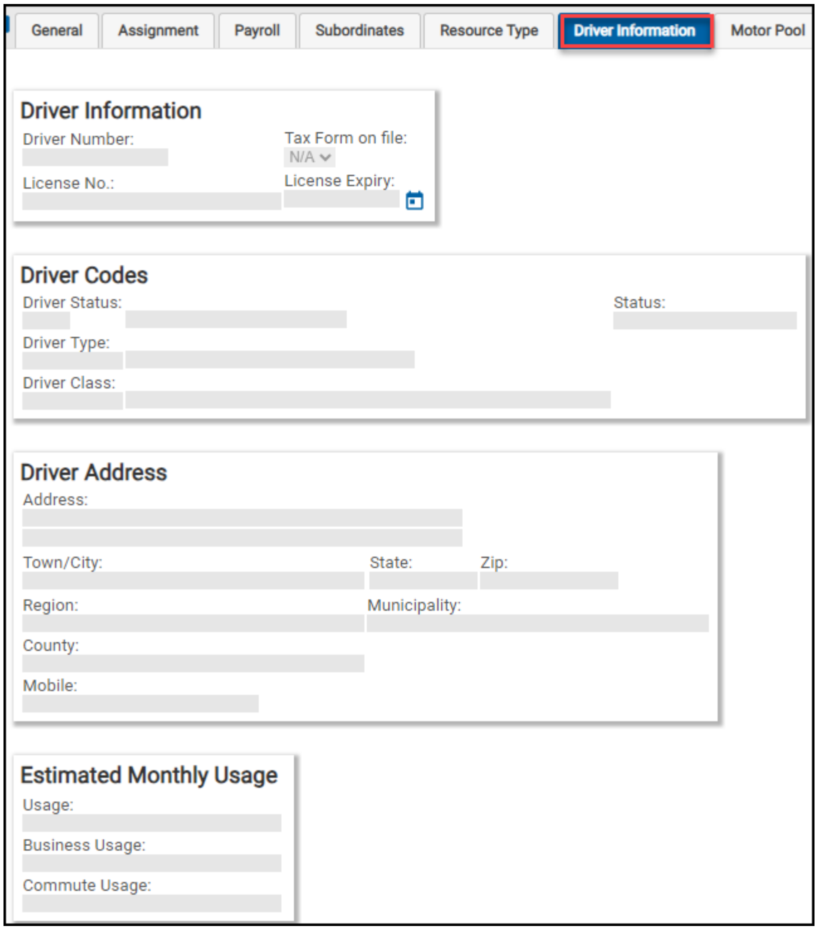


Driver Information tab

The fields on this tab are only available if **Driver** is *Yes* on the **General** tab.

You can begin the setup of the driver-specific details for employees, including driver license information and attachments (PDF license copies) on this tab, rather than by using the *Driver Main* frame.

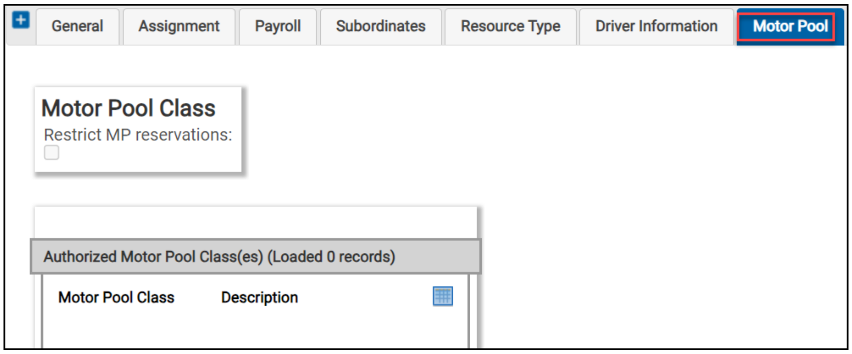
Driver Status and **Driver Type** fields are required if the driver is designated as a driver.



Motor Pool Class tab

The **Motor Pool Class** tab allows you to restrict Motor Pool access for the employee. Select the **Restrict MP reservations** checkbox to limit the employee's reservation capabilities.

Within the *Authorized Motor Pool Class(es)* i-frame, enter the Motor Pool Rental Classes that the employee is authorized to reserve.



Modify Existing Employee Information

You cannot delete an employee record or modify an employee ID if there are any transactions that have been posted for the employee ID.

From the Employee Main frame:

1. Enter a valid employee identification number in the **Employee ID** field. The employee **Name** and **Status** automatically displays.
2. Press **Tab** or **Enter** to select the field to modify. You can enter the new information over the existing information.
3. Select **SAVE** to update your changes.

Deleting an Employee

From the Employee Main frame:

1. Enter the **Employee ID**.
2. Select **DELETE**. The *Action Required* window opens.
3. Select **Delete** to confirm the deletion.

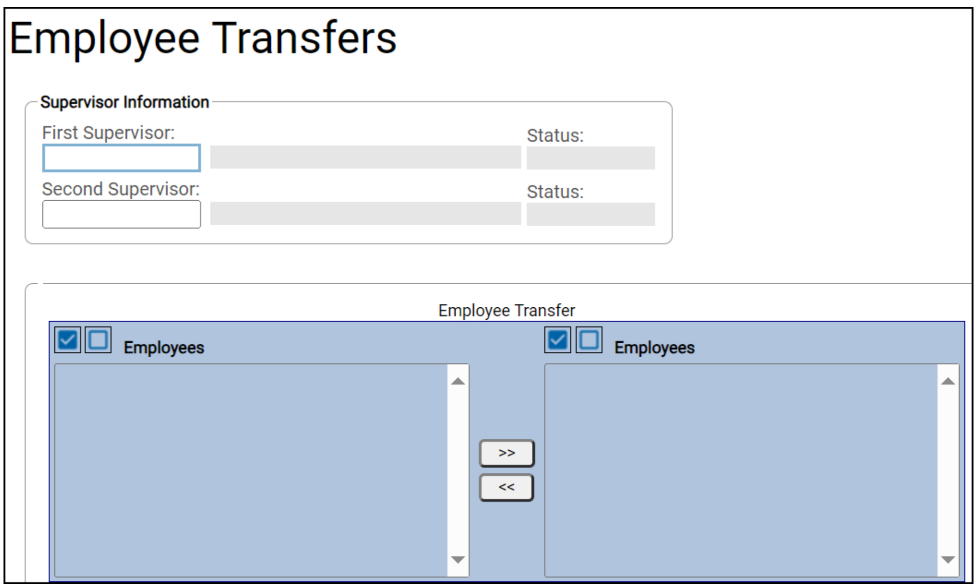
The system searches for associated charges. If charges are found, the message, "*Unable to delete, employee is associated in tables*" displays. Close the error message. Recommend to change the employee status to Inactive and save changes.

Transferring Employees to a different Supervisor

Note: You must be a supervisor to transfer employees.

From the Employee Transfer frame:

1. Enter the **First Supervisor** or select from the Supervisor List. The employee must have the **Supervisor** as *Yes* on the *Employee Main*, *General* tab.
2. Press **Tab** or **Enter**. The left *Employees* column displays the list of employees currently assigned to the First Supervisor.
3. Enter the **Second Supervisor** or select from the Supervisor List who will be the employee's new supervisor.
4. Press **Tab** or **Enter**.
5. Highlight the employee to be transferred from the *First Supervisor* column to the *Second Supervisor* column. Use **>>** to move the employee to the second supervisor.
6. Select **SAVE.**



How Changes to Employee Information Affect Labor Tracking

You need to be aware of how changes to employee information affect labor tracking. Information on the *Employee Main* frame can be changed while an employee is signed in a work order or indirect account. Changes to the home location, pay shift, or union code of an employee can be made while the employee is signed in a job. Changes to a shift code should not be made while an employee is signed in a job or when unapproved labor exists.

Refer to the *Approving Employee Payroll Labor Hours by Supervisor* section for information on approving payroll labor.

Changes to employee information do not affect jobs or indirect accounts that the employee scanned before the change. The change is effective for all time recorded after the next scan.

Example

Fred logs into a job. Someone changes his pay shift while he's signed in. The time between the employee's previous scan and his next scan is charged according to the old pay shift. Fred then signs in a new job. Now his time is charged according to the new pay shift.

Adding Employee Product Information

The *Product Setup Employee* frame gives you the ability to assign certain products to employees who are allowed to fuel units by using systems that require an employee ID or Pin number. This functionality allows for an extra security level in situations where your organization needs to issue fuel products in a more restricted manner.

From the Product Setup Employee frame:

Enter a valid **Employee ID** or select from the Employee List. The employee **Name** and **Status** automatically displays.

- **PIN Required** – Select the checkbox if the employee is required to enter their PIN when issuing fuel products.
- **ICU Supervisor** – Select the checkbox if the employee is an ICU supervisor. The employee will see the supervisor menu at the ICU when their employee card number is entered.
- **Unit Number Required** – Select the checkbox to restrict issuance of fuel products to only a certain unit by requiring the employee to enter the unit number at the ICU.
- **Unit Number** – Enter the **Unit Number** that is required if the *Unit Number* checkbox is selected.
- **Restricted to Shift** – Select the checkbox to indicate that the employee is only authorized to issue fuel products during their shift hours.

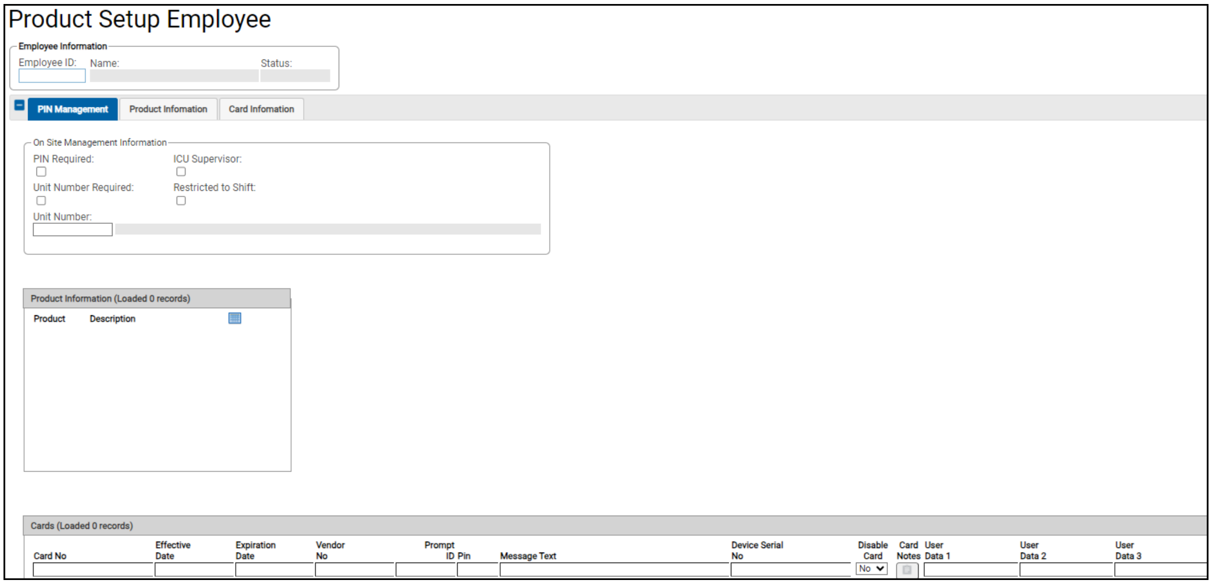
Product Information tab

Enter products that the employee would directly be issued.

Card Information tab

Enter employee **Cards** for fueling purposes. These cards can be set up on the *Product Setup Fuel Cards* frame. Cards set up on the *Product Setup Fuel Cards* frame for the department display. After you have configured the fuel cards, they can be used for fuel transactions at Island Control Units (ICUs).

1. If the **PIN Required** checkbox is selected, enter a pin number in the **Pin** field. Limited to four characters. The Pin number is entered on *Employee Main*.
2. Select **SAVE** to save the employee product information.



Adding Employee Items

Items (also referred to as UDF—user-defined field) must be set up for employees on the *Item Master Definition* frame. An employee item is a user-defined characteristic such as an employee's birthday, an emergency contact, emergency phone number, or blood type that your organization decides should be tracked for most, if not all, employees.

After the setup is complete on the *Item Master Definition* frame, you can use the *Employee Items* frame to maintain the user-defined data per employee.

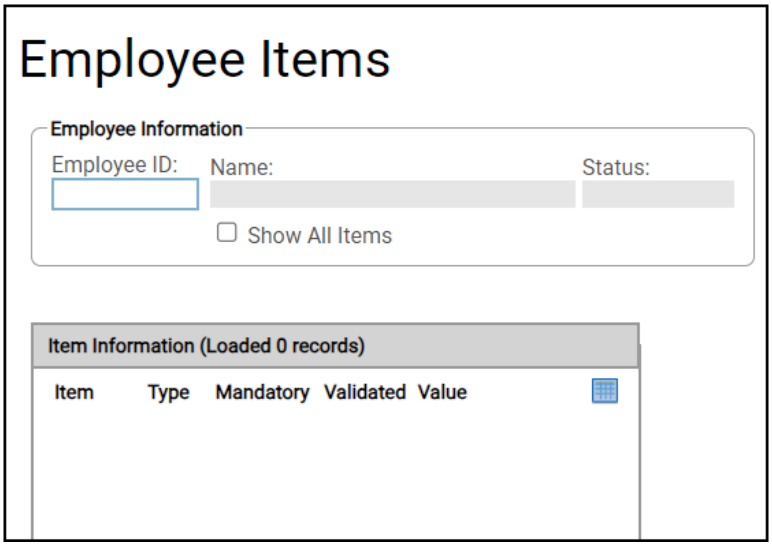
From the Employee Items frame:

Enter the **Employee ID**. The employee **Name** and **Status** fields automatically display.

The *Item Information* i-frame displays the user-defined data.

Items that you have designated as **Mandatory** automatically appear in the *Item* column. To view all items, select the **Show All Items** checkbox.
Note: The Item name, Type, whether it is Mandatory or Validated are designated on the *Item Master Definition* frame.

1. Enter a **Value** when the *Validated* checkbox is selected for the item. The *Validated* value is designated on the *Item Master Definition* frame.
   When the *Validated* checkbox is clear, the **Value** field is a free form field and not required.
2. To add a new item, select a blank **Item** row and select an item from the Employee Item List. Enter a valid **Value**, as applicable..
3. Select **SAVE** to save your changes.



Employee Planned Absence setup

The *Employee Planned Absences* frame allows you to view and set up an employee's planned absence dates. You can specify a range of days for an employee's vacation. A planned absence must be a day in the future. The frame only saves vacation days with a shift duration greater than zero. The time frame entered cannot be greater than seven days.

Note: An employee can have a zero duration day on their non-working shift day. Refer to *Defining Shift Parameters* for more information.

Indirect account code transactions for planned absences are posted daily by the System Run Planned Absences process. The Batch Process Manager Planned Absences process runs at the date and time specified in the frame. This program retrieves each employee's Emp_Holiday record that starts sometime during the current day. At this time, it does not do anything retroactively if the System Run Planned Absences process is not run at all for an entire day (or more).

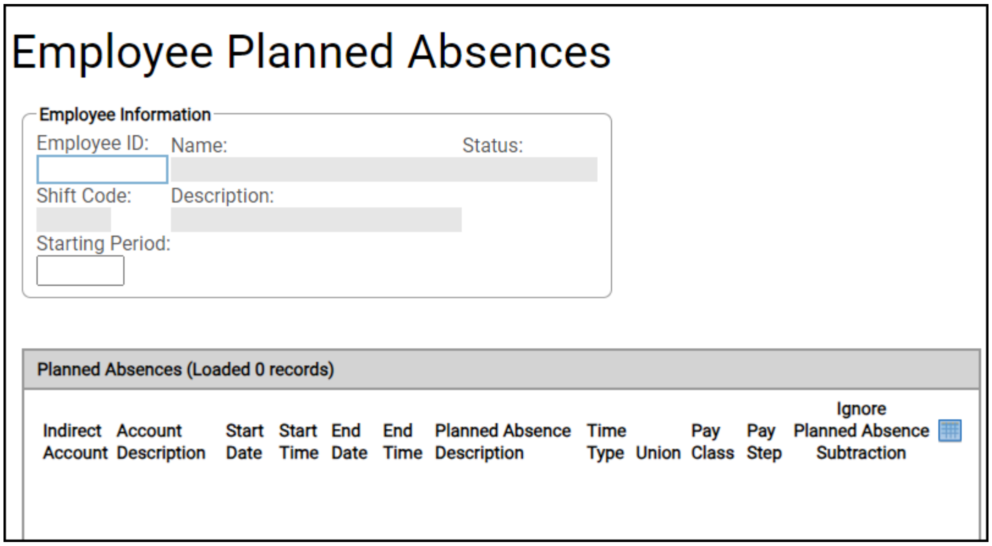
From the Employee Planned Absences frame:

1. Enter a valid **Employee ID** or select from the Employee List. The employee **Name** and **Status** fields display.
2. Enter a **Starting Period** (fiscal period) or select from the Fiscal Periods list. A list of all previously entered planned absences appear in the *Planned Absences* i-frame.

Planned Absences i-frame

3. In a blank row, enter an **Indirect Account Code** or select from the Indirect Account List. The **Account Description** displays.
4. Enter an absence start date in the **Start Date** field. The **Start Time** defaults from the employee's shift.
   Note: If the **Start Date** is the current date the message, "*Start Date xxxxx, cannot be earlier than or equal to today's date*" displays.
5. Enter an absence end date in the **End Date** field. The **End Time** defaults from the employee's shift.
   Note: If the absence time span exceeds seven days the message, "*WARNING: The date range is in excess of 7 days*" displays.
6. Enter the **Planned Absence Description**.
7. Enter the **Time Type** or select from the Time Type Matrix (Base Pay) List.
8. Enter the **Union** number or select from the Union list, as applicable.
9. Enter the **Pay Class** or select from the Pay Class for Employee list.
10. Enter the **Pay Step** or select from the Pay Step for Employee list.
11. Select the **Ignore Planned Absence Subtraction** checkbox, as applicable.
12. Select **SAVE** to save an employee's planned absence.

If you entered vacation time spanning more than one day for the employee, the system looks at the shift table and determines how the vacation date range fits into the employee's shift parameters. The table displays a vacation schedule matching the shift parameters, not the calendar days of the actual vacation.



Company Holidays

Defining Company Holidays

The *Fiscal Calendar* frame is used to maintain the start and end of each year's fiscal periods. After the fiscal periods are defined, you can maintain your organization's paid holidays for a fiscal year by accessing the *Holiday Calendar* frame. After you have established your company holidays, you can include this information for the planned absences of the employees. There are also some reports and forecaster that has an exclude holidays flag. This flag will look at this frame for those holidays.

Adding Dates to the Holiday Calendar

From the Holiday Calendar frame:

1. Enter the four-digit fiscal year for which you want to add non-working days in the **Fiscal Year** field. Existing holidays automatically display in the *Holiday Information* i-frame.
2. To add a holiday, enter a **Date** in a blank row or double-click in the field to select a date from the calendar. The **Day of Week** automatically displays.
3. Enter a valid **Indirect Account** code or select from the Indirect Account List. The holiday time accrues to the indirect account code.
4. Enter a user-defined **Holiday Description**. Limited to 24 characters.
5. Enter a **Location Group** or select from the Group Location List.
6. Repeat the steps to add additional holidays.
7. Select **SAVE** to save the holiday and to refresh the frame with the holidays in order by date.

Note: The *Batch Process PLANNED ABSENCES* needs to run in order to see the holidays on the *Labor Time Card* frame. The holiday applies to all location groups when you do not enter a **Location Group**.

Deleting a Holiday Record

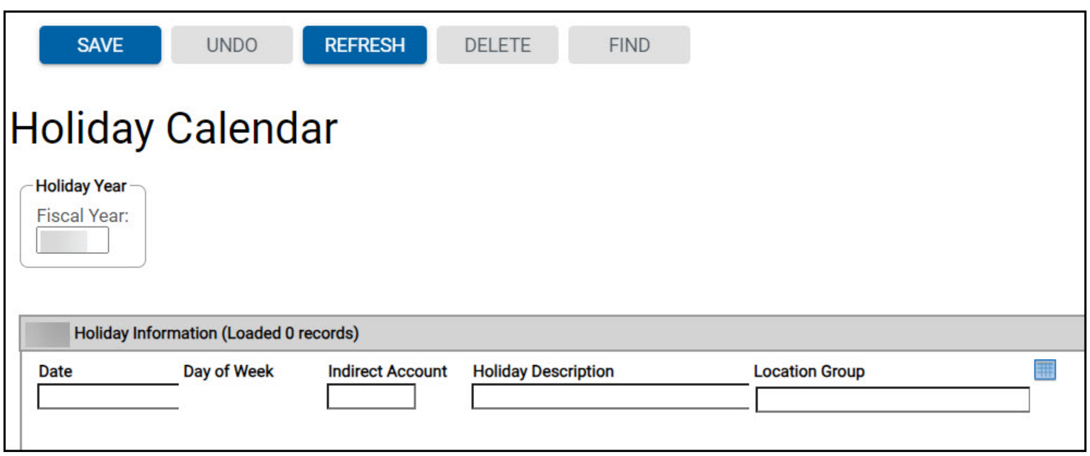
You can delete any number of holidays from the Holiday Calendar.

From the Holiday Calendar frame:

1. Enter the four-digit **Fiscal Year**. Existing holidays automatically display in the *Holiday Information* i-frame.
2. Select the holiday **Date** to delete.
3. Select **DELETE**. The row highlights red.
4. Select **SAVE** to delete the holiday record.

Notes:

- Repeat the steps to delete other holidays**.**
- You are unable to delete a holiday from the *Holiday Calendar* when it is used by other tables in the application.
- Deletion of company holidays will **not** remove planned absences from the employee's schedule of planned absences. This must be completed by using the *Employee Planned Absence* frame.



Pushing a Non-Working Date Onto All Employees

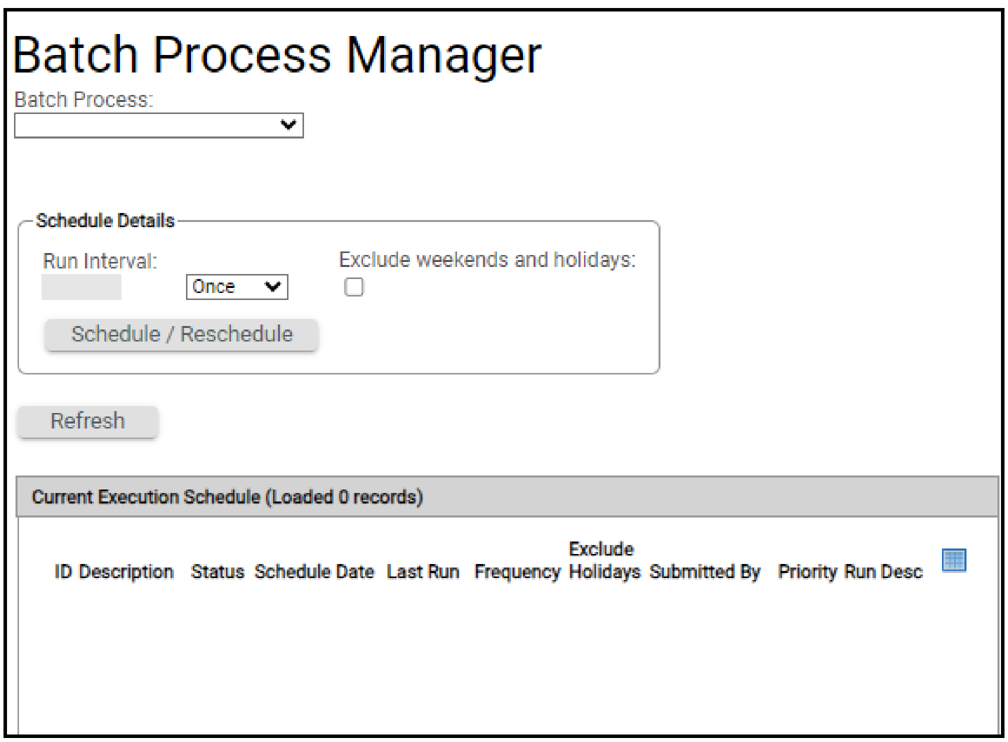
Batch Process Manager – Planned Absence

Indirect account code transactions for planned absences are posted daily by the Planned Absences process. The Planned Absence process runs at the date and time specified in the frame. This program retrieves each employee's Emp_Holiday records that start sometime during the current day. At this time, it does not do anything retroactive if the Planned Absences process is not run at all for an entire day (or more).

From the Batch Process Manager frame:

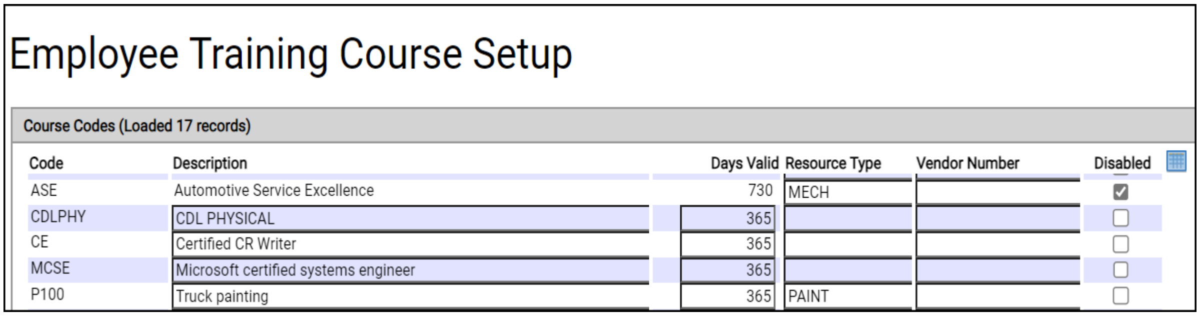
1. Select *Planned Absence* from the **Batch Process** dropdown.
2. Enter the **Date/Time to Start Run** for the process to be run. It automatically runs daily at the scheduled time frame.
3. Select **Schedule** for the process to run. The *Current Execution Schedule* i-frame displays the process run information.

Note: Deletion of company holidays will not remove planned absences from the employee's schedule of planned absences.



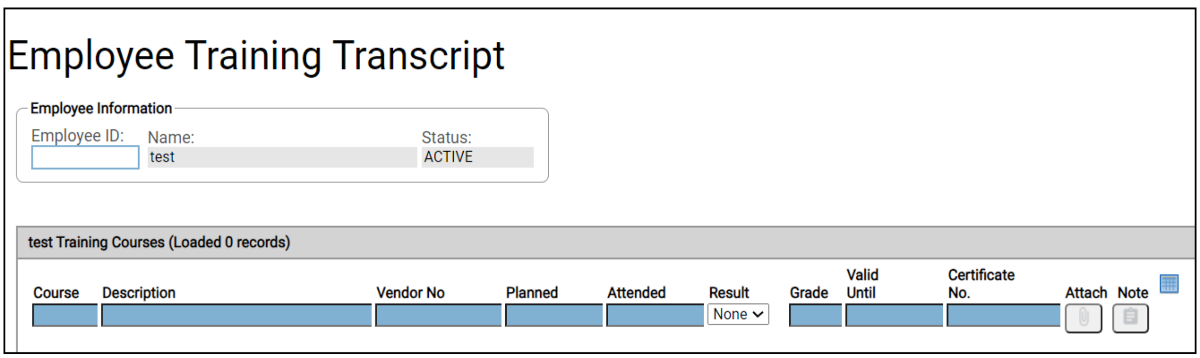
Employee Training Course Setup

Certificates, licenses and training must first be established in the *Employee Training Course Setup* frame. Courses can be associated with a resource type. After the successful completion of a Course, M5 copies the associated course resource type to the employee record along with an expiration date.



Employee Training Transcript

The *Employee Training Transcript* frame records training courses attended and to be attended by employees. These are many aspects to training that need recording. The **Vendor No** field appears on the *Employee Training Transcript* frame and the *Employee Training Course Query* frame. The **Vendor No** field allows the entry of the valid vendor that provided the course and is an optional field. Each course line can have an attachment and notes added to any course record on the employee's Training Course list.



Applying Labor Charges

After a work order is opened or when a non-work order function needs to be performed (for example, training class to attend, floor sweeping), you need to charge employee labor to a work order or to an indirect account code. You can charge labor using one of the labor charging frames:

- **Work Order Processing, Labor tab** – Charge labor to a work order.
  Refer to the *Workflow Application Training User Guide* for more information.

- **Labor Time Card** – Charge labor.

- **Labor Wedge** – Charge labor.

- **Employee Assignment, Touch screen** – Charge labor.

- **Remote Handheld** – Charge labor.
  Refer to the *M5 SmartApps User Guide* for more information.

Entering Labor Information

The *Labor Time Card* frame is used to manually enter or adjust labor information for an employee. Authorized personnel can adjust both the number of hours and the designation of the projects on which the hours were spent.

Examples:

- If an employee forgot to sign in and had no recorded hours for that day, labor hours can be added on this frame.
- If an employee forgot to sign out at the end of the day, a negative adjustment can be entered into the **Time** field on this frame to correct the time recorded.

On the *Labor Time Card* frame, you can enter and display only one employee at a time and all of the related work for a specified date. In addition, the *Labor Time Card* frame allows you to display an employee's previous activities on a given day.

Types of entries on the *Labor Time Card* frame:

- **Indirect Account Code** - Allows you to enter labor information which should be charged to an indirect account code rather than to a work order. For example, labor information for employees who sweep or clean the shop.

- **Work Order** - Allows you to enter labor information which should be charged to a specific unit or department work order.

Jobs can be added *on the fly* in *Labor Time Card* if System Flag 1200 is set to **Y** and the employee is flagged to allow the ability as well. If an unknown job code is entered, a pop-up displays, "*This is a new job for the WO. Do you want to add it?*" If the user selects the option of **Yes**, then the frame asks for a visit reason. The system prompts you if the visit reason requires a charge account and any optional data as defined for that visit reason.

Entering Labor Information using Labor Time Card

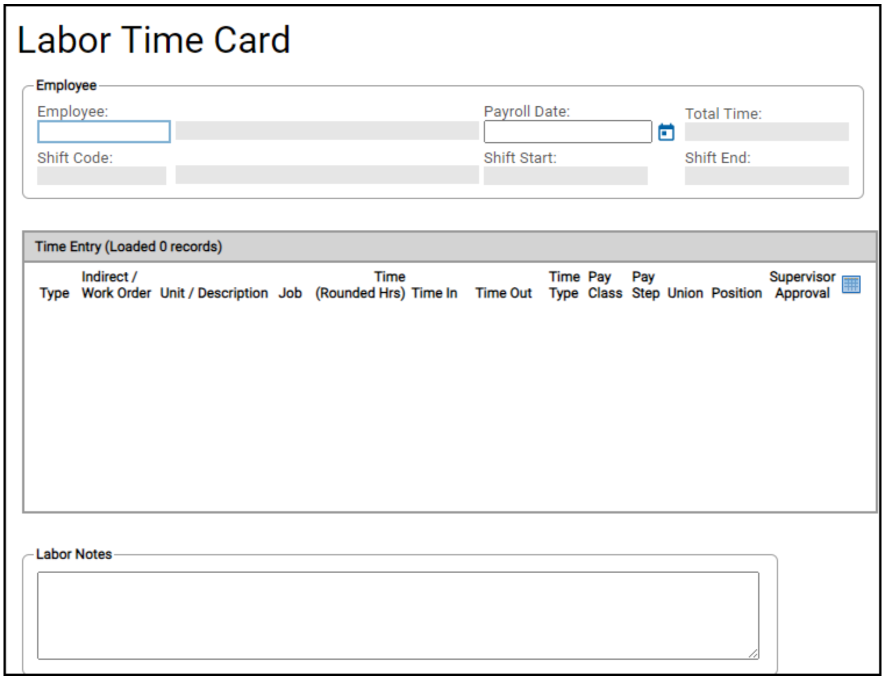
From the Labor Time Card frame:

1. Enter the **Employee** number or select from the Employee List.
2. Enter the **Payroll Date**, and then press *Tab*. The **Shift Code**, **Shift Start**, and **Shift End** fields display.

Time Entry i-frame

3. Select *Work Order* or *Indirect Account* from the **Type** dropdown.
   Note: Whether the **Type** dropdown indicates Indirect Account or Work Order is based on System Flag 5073. When System Flag 5073 is:
   - Set to **Y**, the default transaction type is **Work Order**.
   - Set to **N**, the default transaction type is **Indirect Account** on labor entry frames.
4. If entering indirect time, select *Indirect Account* as the **Type**. Enter a valid Indirect account code. The **Unit/Description** field automatically displays.
5. If entering a labor information, select *Work Order* as the **Type**. Enter a valid **Work Order** code and **Job** code. The **Unit/Description** field automatically displays.
6. Enter the **Time (Rounded Hrs)** or starting and ending times. The entry is based on System Flag 5005. If System Flag 5005 is set to **Y**, then a user beginning time will be recorded as **Time In** and the user end time will be recorded as **Time Out**. The default is **N**. If this is the first entry for the day and entering just the time, the start time automatically displays the beginning of the shift.
7. Enter the **Info** code. The entry is based on System Flag 5004. If System Flag 5004 is set to **Y**, then the Information Code will be captured when Indirect Labor is entered using the labor entry frames. The default is **N**.
8. Entering **Time Type**, **Pay Class** and **Pay Step** fields is based on System Flag 5003. If System Flag 5003 is set to **Y**, then the **Time Type**, **Pay Class** and **Pay Step** of the employee will be captured during the labor entry process. The default is **N**.
9. Enter the **Union** number, as applicable.
10. If the job requires a position, enter it in the **Position** field or select from the Position Code List for System.
11. Select the **Supervisor Approval** checkbox, as applicable.

12. Enter a **Labor Note** that is specific to the employee. It is not related to the job or work order notes. For example, the note can be used to discuss why it took a certain amount of time to complete a job or why the employee had to leave early for the day.



Entering Labor Charges using Work Order Main, Labor tab

The *Work Order Main frame, Labor* tab is used to add or subtract labor charged to a work order. You can only specify one work order to be charged on the *Work Order Main Labor* tab at a time, but you can enter time for all of the employees who worked on that work order on the specified date. By contrast, the *Labor Time Card* frame allows you to specify only one employee, but you can add or adjust all of his or her related work orders for a specified date.

From the Work Order Main, Labor tab:

1. Enter a valid **Job** that exists on the work order. The **Description** automatically displays.
2. Enter a valid **Employee No**.
3. Enter a **Position** if the job requires a position.
4. Enter the **Time** or starting and ending times. The entry is based on System Flag 5005. If System Flag 5005 is set to **Y**, then a user beginning time will be recorded as **Date/Time In** and the user end time will be recorded as **Date/Time Out**. The default is **N**.

5. Entering **Info** code is based on System Flag 5004. If System Flag 5004 is set to **Y**, then the Information Code will be captured when Indirect Labor is entered using the labor entry frames. The default is **N**.
6. Entering **Time Type**, **Pay Class** and **Pay Step** fields is based on System Flag 5003. If System Flag 5003 is set to **Y**, then the **Time Type**, **Pay Class** and **Pay Step** of the employee will be captured during the labor entry process. The default is **N**.
7. Select the **Supervisor Approval** checkbox, as applicable.
8. Enter a **Labor Note** that is specific to the employee. It is not related to the job or work order notes. For example, the note can be used to discuss why it took a certain amount of time to complete a job or why the employee had to leave early for the day.

Labor Wedge frame

Punching in to a WO Job or Indirect Account Using Labor Wedge

For use of Test Suites within *Labor Wedge*, processing is configured based on System Flag 5162 -Test Suites Affect Labor Wedge upon completion of a job on a work order. If the System Flag is:

- Set to **1**, Labor Wedge will complete the job without checking the test suites for the job.
- Set to **2** and the job has test suites where no results have been entered or the results are incomplete, and the mechanic changes the job status to DON, the frame displays a warning, however, the mechanic can change the job status to DON and save the change.
- Set to **3**, the frame will not allow the mechanic to change the job status to DON and will force the entry of test suite data. A message appears to let the mechanic know there is an open Test Suite on the job.

- Set to **4**, the frame will give a warning message to the user when they sign in to a job associated open test suite in the beginning of the process.
  As the mechanic is completing the job, based on System Flag 5162, they will not be allowed to change the job status to DON and save the change until the Test Suites results have been entered and the Test Suites have been stamped completed.

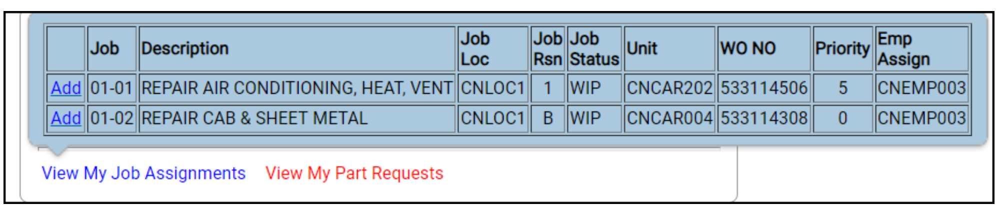
Also, if the mechanic adds a job to the work order through the *Labor Wedge* frame and the job has an associated Test Suite, they will also get the message alerting them that there is an open Test Suite.

When the mechanic returns to the *Labor Wedge* frame to update the status of the job, they will be able to select the Test Suites icon to view the Test Suites and update the test results.

The setting of System Flag 5150 determines which view *Labor Wedge* displays. The frame has the system flag set to **N** to show it displaying as current labor.

From the Labor Wedge frame:

1. If System Flag 5150 is set to **Y**, enter an employee ID in the **Employee ID** field or double-click an **Employee**.
   Note: If System Flag 5009 is set to **Y**, an employee pin number will be required. The default is **N**.
2. Press Tab or Enter. If the employee is currently logged into a job, within the *Last Work Order* i-frame the **WO Number** and **Job Code** displays.
3. Enter the downtime status for the last job and work order in the **Job Status** field.
4. If System Flag 5237 is set to **Y** to display employee assignments from *Labor Wedge* and, if the *View My Job Assignments* link is available, the user can hover over the link to view any jobs assigned to them. To access assigned jobs, select the *Add* link.



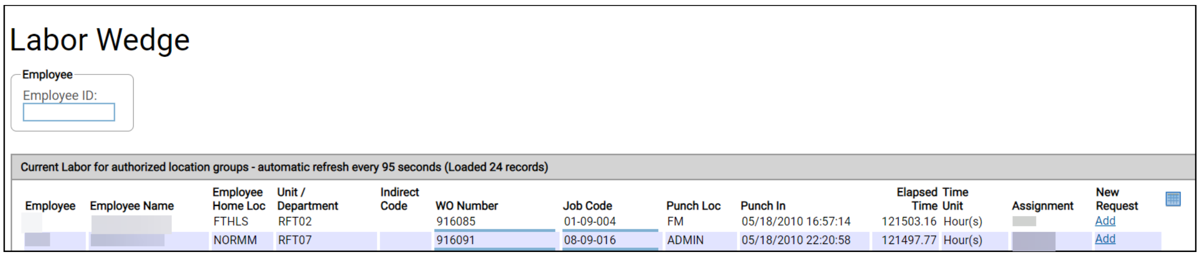
	Job	Description	Job Loc	Job Rsn	Job Status	Unit	WO NO	Priority	Emp Assign
Add	01-01	REPAIR AIR CONDITIONING, HEAT, VENT	CNLOC1	1	WIP	CNCAR202	533114506	5	CNEMP003
Add	01-02	REPAIR CAB & SHEET METAL	CNLOC1	B	WIP	CNCAR004	533114308	0	CNEMP003

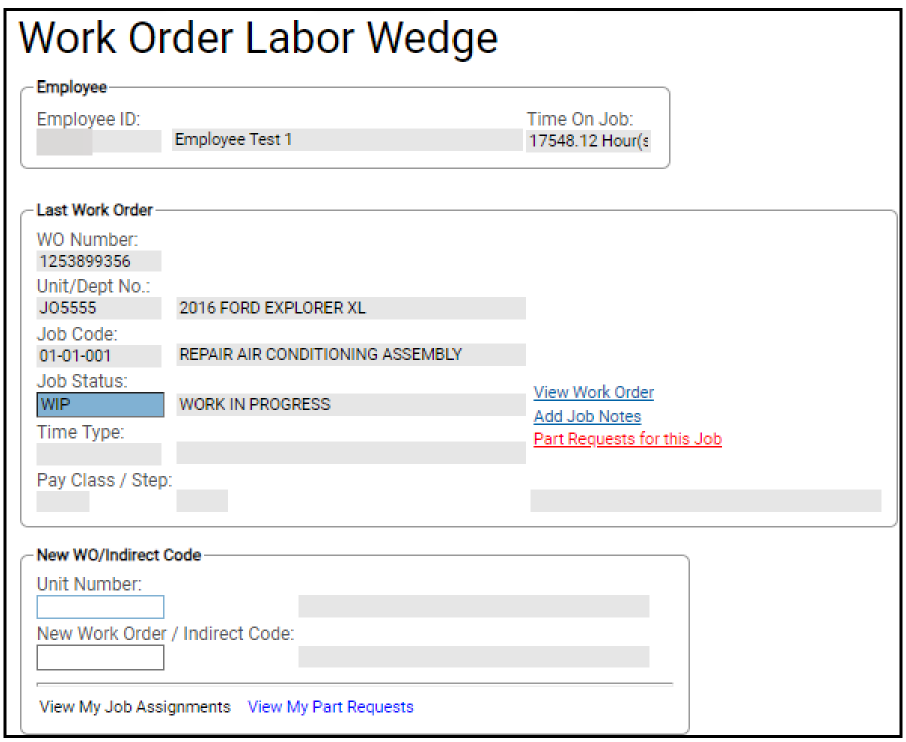
5. If the employee is not currently signed in a job, the cursor moves to the *New Work Order/Indirect Account* i-frame. Enter a work order number or indirect account code in the **New Work Order/Indirect Code** field.
6. On the *Indirect Accounts* frame, the system checks the **Union-Changing Account** or the **Pay-Changing Account** fields. If either field on the *Indirect Accounts* frame is set to **Y** and the **Work Order Entry Required** field on the *Indirect Accounts* frame is

set to **Y**, the necessary relief information fields can be accessed for user entry. If applicable, enter the **Union**, **Time Type**, and **Pay Class/Step** fields.

7. If you entered a **New Work Order**, you would enter a **Job Code**.
8. Select **SAVE** to save the labor information.

The **Job Status** automatically changes to *WIP* (work in progress). When you want to change the status because you are waiting for parts or signing out for the day (for example, you must log back into *Labor Wedge* frame), enter the **Employee ID** and then enter a new **Job Status**. The work order or indirect account charge time is posted to the direct or indirect labor table.





Using Part Request within Labor Wedge

There are multiple ways a technician can create a part request from the *Labor Wedge* frame. Current labor displays in the *Current Labor for authorized location groups* i-frame. To use the functionality, configuration is required. The use of the *Part Request* frame requires a review of system flags and role privileges.

- System Flag 5292 - Allow Part Requests on Labor Wedge? (Y/N) controls whether users can see the part request hyperlinks and icons on Labor Wedge.
- If System Flag 5150 - Display CURRENT LABOR information on LABORWEDGE (Y/N) is **Y**, and System Flag 5292 is also **Y**, then part request icons will display for each row that exists on Labor Wedge.

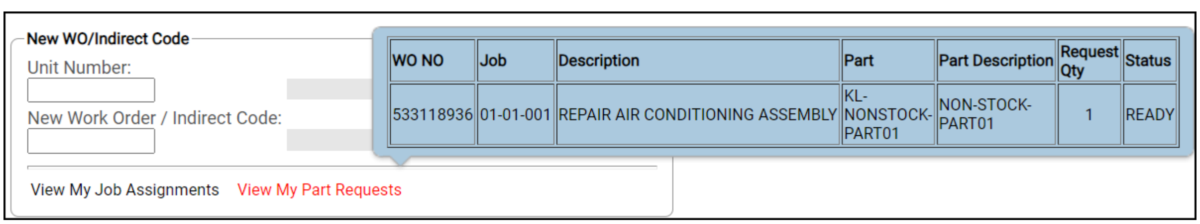
Icons appear next to the work order and job code that indicates part requests are in various statuses. The icons can be selected to launch a display frame showing the part request details. The *New Request* column to the right with an *Add* link allows a user to create a new part request with details such as **Employee** number, **WO Number**, and **Job Code**.

The green, yellow, and red colors indicate the **REQUEST** and **READY** status of part requests. You can hover over the *View My Part Requests* link to view the part request information.

- **Green dot** – *WO Number* column indicates there are part requests in **READY** status. *Job Code* column indicates the job has a part request in **READY** status.

- **Yellow exclamation icon** – *WO Number* column indicates there are parts in **REQUEST**, **ORDERED, IN-REQ**, or **APPROVED** status. **Job Code** column indicates the job for the work order is in the same status.

- **Red stop sign** – *WO Number* column or *Job Code* column indicates there are part requests for the work order or job that are in **REQ-APPROVE** status. Only authorized users can approve a part request. Refer to the *Role Privileges Table* for further information.



Punching an Employee Out of the System

From the Labor Wedge frame:

1. Enter an employee ID in the **Employee ID** field or double-click an **Employee**. The *Work Order Labor Wedge* window opens.
2. Enter the **Job Status** or select from the Job Downtime Status List for the last job and work order.
3. If you are still working on a job, enter the **Job Status** your organization requires when you sign out for the day. The **New Work Order/Indirect Code** field is highlighted.
4. Enter **BYE** and press *Tab*. The **Transaction Start Date / Time** displays.
5. Select **SAVE** to save the labor information.

Part Request frame

To create a part request for a job where the employee is signed in, select the *Part Requests for this Job* link. The link opens the *Part Request* frame. Creating the part request in this manner (vs. by using the menu) will pre-populate the Technician ID, work order number and job code so there are less key strokes. The technician can see any existing part requests on the *Part Request* frame along with the status.

The Part Request frame is used to submit part requests to be handled by the personnel controlling inventory in a parts room setting. It is a means of communication that parts are needed for a specific **Technician**, **Work Order**, **Job** code and a **Needed By Date**. The technician will enter the information for parts needed into the *Part Request* frame. The part number is not required and the part description can be entered with a **Request Qty**. The part number list of values (LoV) supports the following types of LoV searches:

- Search for parts issue to any unit with the same tech spec and job code combination.
- A list of standard parts if they exist for the job (standard job tech spec).
- The part catalog by location search.

The location where the parts are being requested will default to the inventory location associated to the job location. A note can be entered for the request. After selecting **SAVE**, the request appears on the *Part Request Handling* frame.

All existing part requests for the work order and job are displayed at the bottom of the *Part Request* frame regardless of the technician that submitted the request. This is helpful in case a technician is out and another technician has taken over the work order or job.

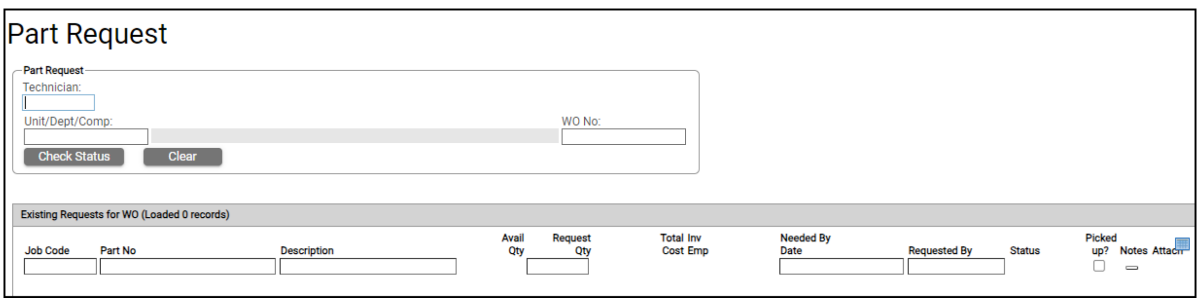
If a mistake occurs, the technician is allowed to cancel the request by selecting the existing row at the bottom of the frame and selecting the **DELETE** icon when the request is in **REQUEST** status.

The technician will save the part request and the form does not clear allowing the technician to quickly enter a request for a new part for the same work order and job.

A part request can have multiple statuses:

- **REQUEST** – New request created.
- **ORDERED** – Part had to be ordered using part requisition or purchase order.
- **REQ APPROVE** – Requires supervisor approval.
- **IN-REQ** – The part request has been made into a part requisition.
- **APPROVED** – Supervisor approved part request.
- **READY** – Parts person has changed the status to ready which will alert the Technician the parts are ready for pickup.
- **CANCELLED** – The Technician, Supervisor, or Parts Person can cancel the request.
- **CLOSED** – The part has been issued.

The *View My Part Requests* link allows a user to hover over it to view all requests for work orders and jobs for the specific employee signed in that are not in **CANCELLED** or **CLOSED** status. The *Part Request* window opens.



Part Request Handling

The *Part Request Handling* frame allows users to:

- Query and review part requests details and enter a part number if only the description is provided.
- Use hyperlinks to pre-populate information to other existing frames in M5 including *Part Requisition*, *Part Purchase Orders* and *Part Issue*.
- Require a part request to be approved by the Supervisor.
- Allow the Supervisor to approve a part request and enter ship terms.
- Cancel a part request.

The top of the *Part Request Handling* frame shows the data being queried. The user can change this information to filter on more specific data. The defaults are **Location** (this is the location the user is signed in) and **Status** of *Request* for part requests where the need by date is within 30 days.

The list of parts is displayed in the *Existing Requests for* i-frame. You can add or edit the **Part No** and **Request Qty** fields.

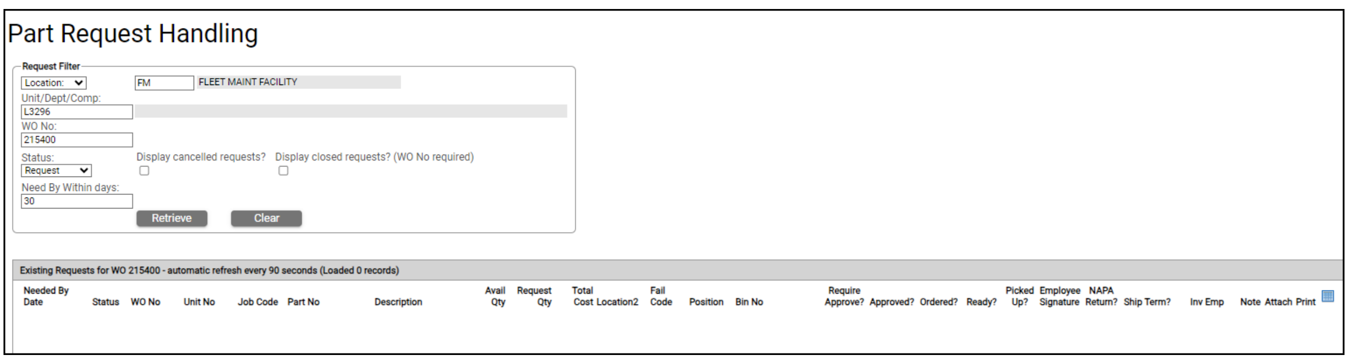
The part number contains the location stock inventory list of values (LoV) to search for a part number. A part request can be cancelled by deleting the row.

The parts personnel can require approval for the part request from a supervisor. The parts person can select the **Require Approve?** checkbox to require approval and it will lock the part request row.

The Supervisor reviews the part requests on the *Parts Request Handling* frame that need approval and selects the **Approved?** checkbox. The *Ship Term?* column is not required.

If a part request contains a part number that must be ordered, the parts person can select the row containing the part to be ordered, and then select *Purchase Requisition* or *Purchase Orders* from the **Related** (dropdown or link) button. The user is prompted to create a new purchase order or purchase requisition.

Tool Tips – You can hover over the work order number which displays the unit number, year, make, model & serial number. Hovering over the part number displays the same information the part number tool tip used on the *Part Issue* frame.



Purchase Requisition

The **Part Request** tab allows you to add available part requests to the *Purchase Requisition* frame.

A part reservation will be made on the *Purchase Requisition* or *Purchase Orders* frames for the work order associated to the part request.

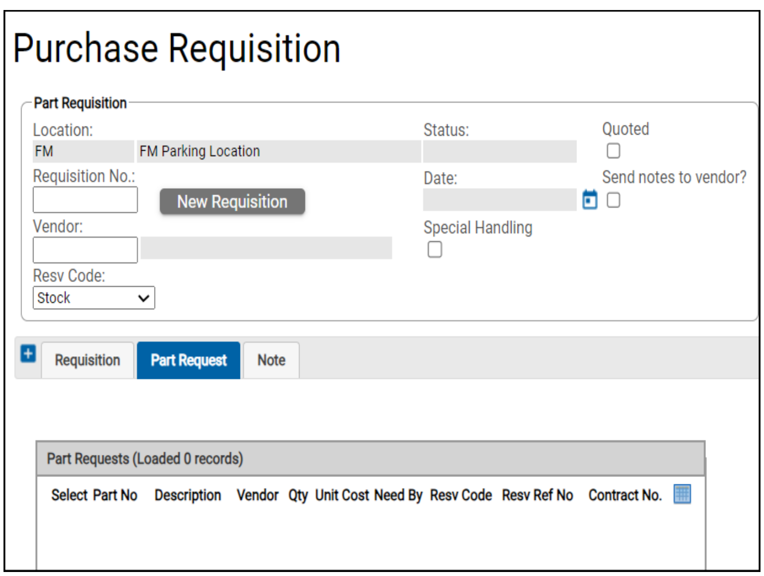
If a **Part Requisition** is created, the next step is to approve the requisition before it can be placed on a purchase order (when conducting automatic approvals, refer to the *Location Main Inventory tab* setting, "**Must a supervisor approve a manual requisition?**"). It is important to note that after the part requisition is created from a part request then it will display as a part requisition on the *Part Purchase Order*s frame, it does not display on the **Part Request** tab.

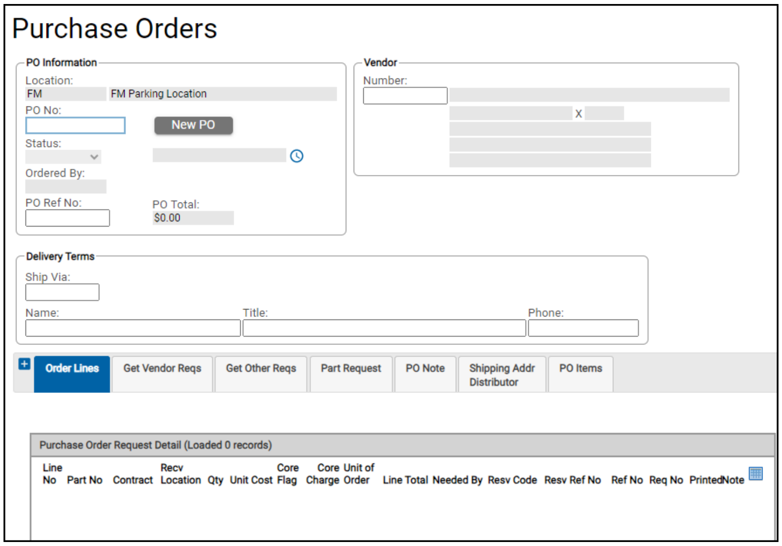
Part Requests that were in an **ORDERED** status, after received, will automatically be changed to a **READY** status.

After the ordered parts have been received, any part that has a request must be issued from the *Part Request Handling* frame.

To issue the part, select the row for the part on the *Part Request Handling* frame and hover over the **Related** (dropdown or link) button and select *Part Request Issue*.

Note: Only parts in a **READY** status can be issued. If the part is in a **REQUEST** status and available to issue without ordering, the user can select the **READY** checkbox for the part request and **SAVE**.



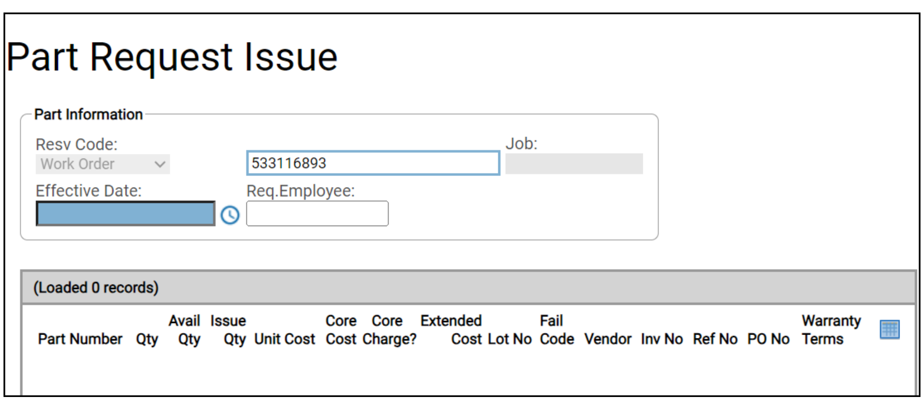


Part Request Issue

The *Part Request Issue* frame opens from the **Related** (dropdown or link) button on the *Part Request Handling* frame. You can issue any part requests for the specific work order and job in a status of **READY**. Serialized, lotted, parts requiring position codes, parts with cores and warranty can be issued from the *Part Request Iss*ue frame.

Important Rules and Tips

- Non-stock, serialized, lotted, parts requiring position codes, parts with cores and warranted parts are all allowed to be issued from the *Part Request Issue* frame. However, any related fields will be required and must be entered upon issue.
- A work order cannot be closed if part requests exist in any status other than **CANCELLED** and **CLOSED**.
- A part reservation cannot be changed on the *Part Reserves* frame if it came from a part request.



Adjusting Labor Charges

You can adjust a specific labor charge transaction for erroneous information. By adjusting the time, you do not actually alter the original transaction, but post an adjustment transaction with the same code to the charge table. Charge transactions can be of positive or negative duration.

1. Enter the work date time period that you would like to display.
2. Highlight the row you want to adjust.
3. Double-click the row. The entry's start time, time type, and informational code are entered on the **Labor Time Card Table** field. The Labor Time Card status line displays the selected charge transaction's original duration. For example, Time on received line was 2.50.
4. Change or add information, as applicable.
5. If necessary, repeat steps 1-4.
6. To save the adjustment, select **SAVE** from the file menu.

Labor Approval by Supervisor

When accessed by a supervisor ID, the *Payroll Labor Approval* frame allows foremen and other supervisors to display, approve, and print an employee's payroll labor hours. The frame displays the payroll and non-payroll time for all subordinates (not depending on location or shift) that have indirect or direct labor charged on the approval date. When entered by a timekeeper, the *Payroll Labor Approval* frame displays the payroll time for all employees that have been approved already by a supervisor.

- Foreman cannot display employee payroll information during an employee shift.
- Payroll information can only be displayed after the shift has ended.
- Payroll information cannot be displayed on the *Payroll Labor Approval* frame until the employee has signed out of a job.
- You can approve all currently finished indirect and direct jobs and later re-enter the data in the frame to approve the finished overtime work.

Payroll Time Calculations

Employees normally work during the time frame of their shifts (for example, Monday-Friday 07:00 to 15:00). In order to consider the situation when an employee can start on a job prior to the start of their shift (for example, log onto a job at 06:50), an overtime start time period is added to each shift's normal start time.

All jobs starting within the time frame of the overtime start time and the shift end time are considered part of that day's shift. In giving the employee the lead way of time between the overtime start time and the shift end time to perform labor, payroll time starts from the first transaction recorded within the time until the duration of the shift.

Those records that occur after the total length of the shift have their time type changed to the overtime time type code.

For example, an employee works the following for a shift that begins at 07:00 and ends at 15:30 with an overtime start time set to 06:00, ignoring breaks and assuming a time type for all records is 01.
Although the shift ends at 15:30, the shift length (8.5 hours) ends for this employee at 15:00. Therefore, the 12345/02/E311 payroll record becomes 40 minutes for regular time (01) and a new record of 30 minutes of overtime is created. Records after the end of this period, in this case 23456/01/E311, are also changed into overtime. If the foreman adds time to the employee using the *Labor Time Card* frame (as the *Labor Payroll Approval* frame also displays), the payroll information displays for the labor charges on the *Labor Payroll Approval* frame, but time types are not recalculated for overtime charges. Payroll time on the *Labor Payroll Approval* frame is only calculated from the charge tables after the criteria is first entered; it is not re-calculated during the same session. Payroll time can be recalculated if you clear the *Labor Payroll Approval* frame and re-enter the frame with the same supervisor and approval date parameters.

You can decide whether to calculate overtime daily or weekly. The following system flags control how to calculate overtime:

- **System Flag 5272** – Period of Time to Calculate OT, D)aily, or W)eekly, S)hift. The **Default Value** is **D**.
- **System Flag 5273** – Standard Labor Hours. The number of hours considered standard for the period of time to calculate with System Flag 5272.
- **System Flag 5274** – Weekly OT start day. The **Default Value** is **0** which is Sunday to preserve existing functionality.

The *Payroll Labor Approval* frame is used to approve labor by the Supervisor or Timekeeper. The *Payroll Labor Approval* frame was modified to calculate overtime based on how the system flags are set.

Adjusting Payroll Information

The supervisor can adjust payroll time in three ways:

1. A supervisor can open the *Labor Time Card* frame from the main menu while the *Labor Payroll Approval* frame is displayed and create positive or negative direct or indirect labor charges. Payroll information then displays on the *Labor Payroll Approval* frame for the newly created charge records when the information is saved on the *Labor Time Card* frame. The adjustments do not cause the regular and overtime parameters to be recalculated.

2. A supervisor can open the *Work Order Main* frame by using the **Labor** tab without the *Labor Payroll Approval* frame displayed and create positive or negative direct or indirect labor charge. When the *Labor Payroll Approval* frame is displayed, the adjustments are figured within the employee regular and overtime parameters.

3. A supervisor may change the time directly on the *Work Order Labor Approval* frame by changing the duration in the **Time** field or by adding or deleting lines in their entirety. The adjustments do not cause the regular and overtime parameters to be recalculated.

Approving Labor

Note: The System Flag 5117 setting determines the view of the *Labor Payroll Approval* frame. When System Flag 5117 is set to **D**, you are able to add labor entry from this frame if you are a supervisor and also approving the labor as a supervisor at the same time. Labor entries are entered in blank rows within the *Labor Approval* i-frame. Any changes to unapproved labor rows (including adding a new row) will not be saved unless they are approved.

From the *Labor Payroll Approval* frame:

1. Enter the supervisor ID in the Supervisor or Timekeeper **ID** field. If the supervisor is also a timekeeper, select the dropdown next to supervisor **ID** and select the appropriate title.
    - **Supervisor** – Charges not approved by supervisor or timekeeper.
    - **Timekeeper** – Charges approved by supervisor.
    - **Both** – Charges not approved by supervisor or timekeeper.
2. Select Supervisor if you want to display unapproved labor charges on the *Labor Payroll Approval* frame.
   -or-
   Select **Both** if you want to display charges not approved by a supervisor or timekeeper on the *Labor Payroll Approval* frame.
3. Press **Tab** to accept the day before date as the payroll shift approval date in the **Date to Approve** field. Leave the **Date to Approve** field blank to display all unapproved employee payroll information for the supervisor.
4. Select the **Retrieve** button to retrieve payroll labor information for all subordinates of the supervisor within the date range.

All employees who are on shifts that have ended as of the approval date display with previously charged payroll information based on indirect and direct labor charges will have time type and payroll information display based on the charges. If the employee never was charged labor for the day, an employee ID displays with a shift start date or time, the employee's basic payroll information and duration equal to 0 hours.

Overtime Calculation and Pay

- The regular and overtime information is calculated.
- Regular time is based on the shift length.
- Overtime is the amount of time the employee worked above the standard shift length. Overtime time types default from the base pay time types entered on the *Time Type Matrix* frame. For example, an employee normally works from 06:45 to 15:00, with shift overtime start time set to 06:30. He begins working on a job at 06:45 and ends work at 15:15. For that day, there is 8 hours of regular time (06:45 to 14:45) and 30 minutes of overtime (14:45 to 15:15).

System Flag 5272 specifies the period of time to calculate over time at labor approval, D (daily), W (weekly), or S (shift). This flag also works in conjunction with System Flag 5273. As an example, if this flag is set to weekly and System Flag 5273 is set to 40, an employee is eligible for overtime once they have worked 40 hours that week. You could also choose Daily and set a value of 8 for System Flag 5273 so that once an employee has worked eight hours for the day, they are eligible for overtime. If this flag is set to **S-Shift**, all other shift duration related flags will be ignored (System Flag 5273, for example) as they relate to the number of hours per day or week before OT is calculated and are not necessary for this functionality to work. If a vacation time was scheduled during the time frame, payroll information displays with the vacation assigned indirect account code's informational code and the vacation hours displaying in the **Time** field. If the employee worked on a company holiday, the payroll information for the vacation hours displays as well as the charged payroll information for the day. The time type for the charged payroll information will need to be manually changed by the foreman to the correct overtime time type.
Review employee payroll time on the *Labor Payroll Approval* frame. If an employee has no charges for the shift date, the default payroll information entered on the *Employee Main* frame for the employee displays on a row with 0 hrs as the duration in the **Time** field.

Authorizing Payroll Information

Review the payroll information for the employee and shift you want to authorize to make sure the information is correct. After you authorize the payroll information, you are unable to display the information again as a supervisor. The information has been sent to the timekeeper to review.

1. To authorize all rows on the *Labor Payroll Approval* frame, select the **Approve All** button.
   -or-
   To authorize certain employees, select the **Supervisor Approve?** checkbox for the rows to approve.

2. To save the supervisor approved payroll records and send the information to the timekeeper to approve, select the **SAVE** button.

Indirect account codes that are marked to not forward to payroll are not posted to the payroll table and will not be displayed for a timekeeper using the *Labor Payroll Approval* frame.

The payroll information is posted to the payroll table and the original charge records are marked with the supervisor's ID and the date or time of approval.

Authorizing an Employee's Payroll Information

1. If you want to approve an employee's payroll time without making any changes, highlight the **Supervisor OK?** field for the employee.
2. Select the **Supervisor OK?** field to approve all the employee's time for the day. Setting an employee's **Supervisor OK?** field to *Yes*, sets that entire employee record for the shift day to *Yes*.

Changing Payroll Charges

1. With the *Payroll Labor Approval* frame displayed, open the *Labor Time Card* frame from the main menu.
2. Display the *Payroll Labor Approval* frame to the foreground.
3. Double-click the payroll line on the *Payroll Labor Approval* frame you would like to add payroll transactions by using the *Labor Time Card* frame.
4. Highlight the labor charge line to update.
5. Double-click on the charge line to display transaction information on the *Labor Time Card* frame. The *Payroll Labor Approval* frame moves to the background and the *Labor Time Card* frame moves to the foreground. The *Labor Time Card* frame displays the appropriate employee information.
6. With employee information displayed on the *Labor Time Card* frame for the specified employee and shift date, enter direct or indirect labor charges.
7. From the file menu, select **SAVE** to save the direct and indirect charges and send the charges to the *Payroll Labor Approval* frame for approval. **Note:** When the charges are sent to the *Payroll Labor Approval* frame, they are sent with the time type entered on the *Labor Time Card* frame. Overtime is not recalculated when the charges are sent.
8. If the payroll row for the employee that you charged direct or indirect labor already has its **Supervisor Approve OK?** field set to *Yes*, the following message, "*Warning! Previously approved date/time has a new charge for employee X. Changing approval to not OK*" displays. Select the **OK** button.

When the payroll information is sent the status bar on the *Payroll Labor Approval* frame displays, “*Added more time for date/time for Employee X. Find it at row N*." If this is the first charge for the employee on the shift date, the payroll information for the sent charge displays for the employee replaces the default employee row information with *0 hours* duration in the **Time** field.

When the payroll information is sent the status bar on the *Payroll Labor Approval* frame displays, "*Added more time for date/time for Employee X. Find it at row N*." If this is not the first charge for the employee on the shift date, but there is not another payroll record for the same type of charge, the payroll information for the sent charge displays on the first line of the **Table** field. For example, if the employee has payroll information for a direct charge, but no payroll information for an indirect charge (which has a unique informational code), the indirect labor payroll information displays on a separate line.

When the payroll information is sent the status bar on the *Payroll Labor Approval* frame displays, "*Added more time for date/time for Employee X. Find it at row N*." If this is not the first charge for the employee on the shift date, but there is another payroll record for the same type of charge, the charge duration for the sent charge combines with the matching line in the **Table** field. For example, if the employee has payroll information for an indirect charge (training) and all the time type, pay class, pay step and informational code information is the same, the payroll information combines with an existing time duration and a new charge time displays.

Refer to the *Entering and Adjusting Labor Using the Labor Time Card frame* section of this manual for more information on using the *Labor Time Card* frame.

Recalculating Regular and Overtime Time Type Divisions

Regular and overtime time type totals are calculated from the charge tables after the criteria are first entered, but are not re-calculated again during the same session. Charges made from *Labor Time Card* while the *Payroll Labor Approval* frame is displayed directly change the *Labor Payroll Approval* frame payroll time totals, but do not cause the *Payroll Labor Approval* frame to re-sum individual charges according to regular and overtime time type parameters.

If you do not follow steps 1-2 below, you can continue to add and delete payroll and charge information on the *Payroll Labor Approval* frame, but no attempt is made by the frame to guarantee that the payroll time conforms to a shift’s regular and overtime parameters. For example, an employee can be given 100 hours of overtime on a day, even though the shift is less than 100 hours long and the employee has no posted regular time.

1. If you would like to see your labor time card entered new payroll charges re-calculated according to overtime parameters, select **Clear All** from the *Edit* menu prior to changing any payroll time information directly on the *Payroll Labor Approval* frame.
2. The system prompts, **Clear without saving changes?** Select the **OK** button.
3. Repeat the process starting with step 2.

Changing Payroll Row Information

1. Highlight the employee on the **Shift Code** and **Shift Start** you want to change.
2. Enter new **Time Type**, **Pay Class**, **Pay Step**, **Info Code**, and **Pay Shift** values. Keep in mind that direct labor does not carry an **Info Code**.
3. Enter a new payroll time for the record in the **Time** field. Press *Tab*.

When you exit the **Time** field by pressing *Tab* or selecting another field, the sign in location's rounding factor is immediately applied to the changes. For example, if the supervisor charges a time from 8:15am to 8:34am, and the location factor is every 15 minutes, the amount in the field automatically round to 8:30am.

Deleting Payroll Row Information

1. Highlight the payroll row for the employee and shift date you want to delete.
2. From the *Edit* menu, select **DelRow**.
3. If you are trying to delete the only row for the employee on the shift date and the **Time** field displays *0 hrs*, the system beeps and the status bar displays, "*You cannot delete the only record for an employee on a day*."
4. If you are trying to delete the only row for the employee on the shift date and the **Time** field does not display *0 hrs*, the status bar displays, "*You cannot delete the only record for an employee on a day.:*" The system prompts, "*Because this is the only row for this person for this day, it cannot be deleted. Do you want to set the time to zero?*"
5. Select the **Cancel** button to return to the row without changing the duration time.
   -or-
   Select the **OK** button the change the duration time to *0 hrs*.
6. Zero (0) hour payroll records will not be displayed on the *Payroll Labor Approval* frame when accessed by a timekeeper.
7. If you are trying to delete one of many rows for the employee on the shift date, The system prompts, "*Are you sure you want to delete this row (Warning: Overtime will not be recalculated!)?*" Select the **OK** button to delete the row.
   -or-
   Select **Cancel** to return to the row without deleting the row.

Labor Approval by Timekeeper

After a supervisor approves payroll information, the *Payroll Labor Approval* frame is also used by the payroll department to display, modify, and authorize final approval on employee payroll hours. When entered as a **Timekeeper**, the *Payroll Labor Approval* frame displays all outstanding supervisor-approved labor.

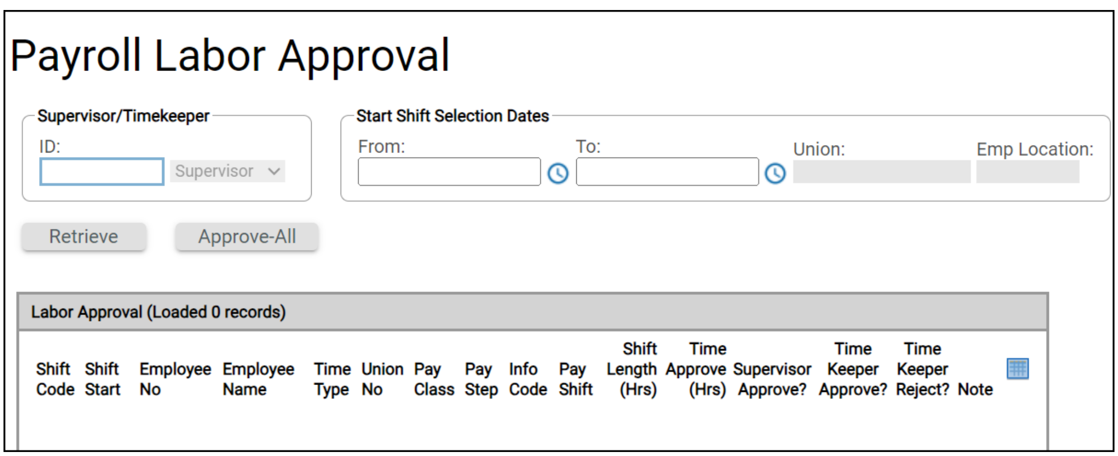
Labor is extracted from the payroll records already approved by a supervisor and is not separately determined from the original charge records. If the timekeeper enters direct or indirect charges by using the *Labor Time Card* frame while using the *Labor Payroll Approval* frame, those charges are not reflected on the *Payroll Labor Approval* frame, the supervisor will need to re-approve these new charges.

Adjusting Payroll Information by Timekeeper

A timekeeper can adjust payroll time in two ways:

1. A timekeeper can change the time directly on the *Payroll Labor Approval* frame by changing the duration in the **Time** field or by adding or deleting lines in their entirety. The adjustments do not cause the regular and overtime parameters to be recalculated. The new duration is also never re-rounded according to the sign in location's rounding factor.

2. A timekeeper can open the *Labor Time Card* frame from the main menu while the *Payroll Labor Approval* frame is displayed and create positive or negative direct or indirect labor charges. The new payroll time must be approved by the employee's supervisor before the timekeeper can approve the charges.

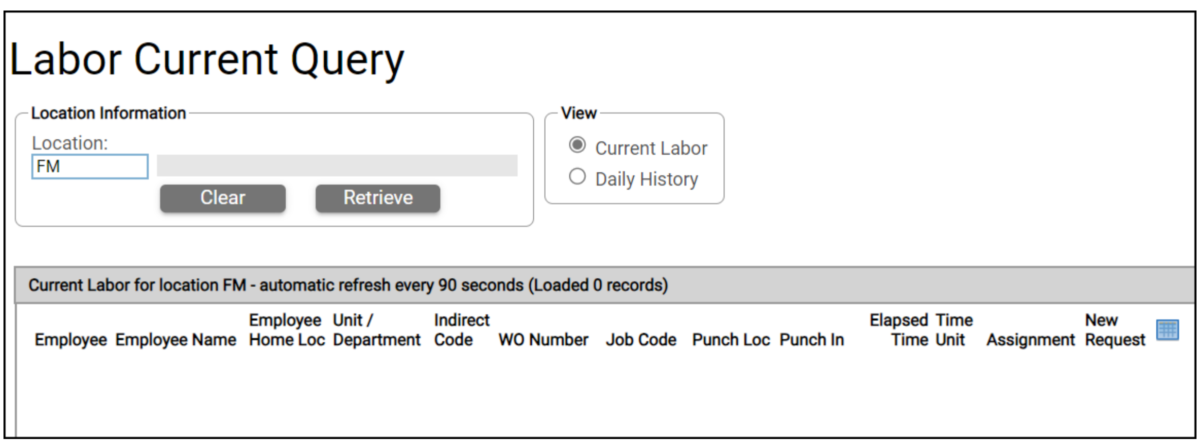


Displaying Labor

Displaying Current and Previous Labor

The *Labor Current Query* frame lets you quickly view all active employees at your sign in location, those signed in a job (work order or indirect account) on a barcode reader or through the *Labor Wedge* frame and information about the work they are performing. You can determine whether an employee forgot to sign out. The *Labor Current Query* frame displays a punch in time and the number of elapsed hours. If the elapsed hours are exceedingly greater than the shift length, the employee should be signed out through the *Labor Wedge* frame before proceeding with the labor approval process. The frame allows you to display an employee's activity earlier in the shift by selecting the **Daily History** view option. The **Elapsed Time** displays in hundredths or minutes.

Employee - Displays the employee ID of the person signed into a work order job or indirect account code.
Employee Name - Displays the employee name associated with the employee ID.
Employee Home Loc - Displays the location where the employee is signed in.
Unit/Department - Displays the unit number or department number associated with the work order.
Indirect Code - Displays the indirect account that the employee is currently assigned against.
WO Number - Displays the work order that the employee is currently assigned against.
Job Code - Displays the work order's job code.
Punch Loc - Displays the location that the employee is working within.
Punch In - Displays the start time for the work being performed.
Elapsed Time - Displays the elapsed time since work started.
Time Unit - Displays the elapsed type, usually in hours.
Assignment - Displays the employee or employee group that may have been assigned.
New Request - Provides functionality to make a part request for that particular job. The *Add* link opens the *Part Request* frame to include additional details.



Shift Types

A Shift Type includes individual shifts together for the purpose of planning work using the FleetFocus™ M5 planning module. A shift type can contain many employee shifts. For example, you group all morning shifts into a single scheduled shift and call it Day Shift.

Shift Types

Shifts and Descriptions (Loaded 7 records)

Schedule Shift	Description	Disabled
1	DAY SHIFT	☐
2	SWING SHIFT	☐
3	GRAVEYARD SHIFT	☐

Time Types

When you first enter the *Payroll Labor Approval* frame, an employee's payroll time is calculated for regular and overtime based on their default time type. An employee's default time type can have different default time types, depending on how your system is set up. The system bases the payroll time types on the first non-blank value:

- Employee home location time type set on the *Location Main Maintenance* tab (based on the home location, set on the *Employee Main* frame).
- Employee time type set on the *Employee Main Payroll* tab.
- The system default time type set on the *Payroll Time Type Matrix*.

Overtime time types are based on the base pay time types set on the *Payroll Time Type Matrix* frame.

Payroll Time Types

Time Type Information (Loaded 25 records)

Code	Description	Disabled	Exclude from OT	Rate Adjust	Base Hours	Temp Not Allowed	Max Hours	Other Data
01	Regular Time	☐	☐	☐	☐	☐	0	
010	Regular Pay	☐	☐	☐	☐	☐	8	
020	Overtime Days	☐	☐	☐	☐	☐	0	

Time Rounding

When first entering the *Payroll Labor Approval* frame, payroll time in the **Time** field is determined from the sign in location's maintenance location information on the *Location Main Maintenance* tab. For example, if the total time on direct and indirect charges is 8 hours 34 minutes and the rounding factor is set to every 15 minutes, 8.50 or 8:30 displays in the **Time** field.

If you enter new payroll information using the *Labor Time Card* frame while the *Payroll Labor Approval* frame is displaying or directly on the *Payroll Labor Approval* frame, the payroll time is not automatically recalculated. You need to exit the newly created payroll row **Time** field by selecting another field or press *Tab* on the field to force the duration to be recalculated according to the payroll rounding factor.

Updates

Release	Section	Description
23.2	Company Holidays	Added Location Groups to the Holiday Calendar.
24.0	Applying Labor Charges	Updated the reference file title names.
24.1	Overtime Calculation and Pay	Added System Flag 5272 – Period of Time to Calculate OT, D)aily or W)eekly, S)hift handling.