

Managing Employee Segments

(Individual/Group Hours functions for Time Keepers)

- An **employee segment** is a single line that represents part of an employee's worked time. A single day's work can consist of multiple segments.
- Segments can be managed in both **Individual Hours** and **Group Hours** with minimal differences (process differences will be noted where applicable)
- **Individual Hours** and **Group Hours** share employee filters, and both functions have access to Job Code, Cost Code, and Exception filters; for more information on filters, see the **Managing Filters** guide
- All these functions are performed in either **Group Hours** or **Individual Hours**, which are accessed via the **Hours** tab

Managing Segments

- Segments are managed by employee – in **Individual Hours**, select the employee from the list on the left. In **Group Hours**, ensure that the employee is visible on the screen
- Employees who have no segments that fit the applied filters (date, job code, etc.) will *not* be visible in **Group Hours** but can still be accessed in **Individual Hours**

Edit a segment

1. Select the segment that requires editing – the segment will be highlighted, and the leftmost column will have a check mark
 - a. Ensure that only *one* segment is highlighted/selected
2. Click **Manage**, and then click **Edit**
3. Change one or more of the following fields, as needed:
 - a. **Time in and Time out**
 - i. Change the date manually by inputting a date, or by selecting the date from the 'calendar' icon
 - ii. The dates on **Time in** and **Time out** must match, unless an employee worked past midnight
 - iii. Change the time manually by inputting a time, or by selecting the time from the 'clock' icon
 - iv. Time can be entered as hours and minutes using the colon symbol and am/pm (e.g. 7:30am)
 1. Use 15-minute increments (e.g. 7:15, 7:30, etc.)
 - b. **Job Code**
 - i. To change a job code, click the drop-down box to open it, then click the desired job code
 - c. **Hours** (Time Sheet entries *only*)
 - i. Click in the **Hours** field, and delete/replace the existing number with the desired entry
 - ii. Input hours in hours and minutes, using a colon (e.g. 4:30 for four hours, thirty minutes) or as a decimal using a decimal point (e.g. 4.5 for four hours, thirty minutes) – the system will convert the entry to hours and minutes automatically
 - iii. Use 15-minute/quarter hour increments (e.g. 2:30/2.5, 3:45/3.75, etc.)
 - d. **Cost Code** (for applicable employees like Substitutes)
 - i. Click **Select** next to the **Cost Code** field
 - ii. Begin typing the name of the school/site in the **Search** field
 - iii. Select the applicable cost code
 - iv. Click **Ok**
 - e. **Custom** (to manually change the GL coding on a substitute)
 - i. **Use this function only if a special GL coding is needed – standard coding is otherwise automatic**
 - ii. Click **Custom**
 - iii. Click **Munis for Pasco** to expand menu
 - iv. Input full GL coding, **including periods**, in the **Long GL Account Regular** field
 - v. Click **Save** to return to the **Edit Segment** screen
4. Change an employee's 'clocked in' status, if needed
 - a. If **Individual is clocked in** is checked, uncheck it to 'clock out' an employee, then enter a **Time out** as above
 - b. If **Individual is clocked in** is not checked, check the box to eliminate the employee's **Time out**
 - i. This will cause the employee to be 'clocked in' and allow them to clock out at the end of the day
5. Input a note in the **Note** field to briefly describe why a change was made (e.g. 'Employee forgot to clock in')
6. Click **Save** to finalize changes

Add a segment

1. Click **Add** (in **Individual Hours** the **Add** button is located just beneath the **Start Date**; in **Group Hours**, the **Add** button is located next to the employee's name)
2. Input segment details
 - a. **Time in** and **Time out** default to the current date, with a 9:00 AM and 5:00 PM in and out time
 - i. Change the date manually by inputting a date, or by selecting the date from the 'calendar' icon
 - ii. The dates on **Time in** and **Time out** must match, unless an employee worked past midnight
 - iii. Change the time manually by inputting a time, or by selecting the time from the 'clock' icon
 - iv. Time can be entered as hours and minutes using the colon symbol and am/pm (e.g. 7:30am)
 1. Use 15-minute increments (e.g. 7:15, 7:30, etc.)
 - b. **Job Code** defaults based on the employee's default job
 - i. To change a job code, click the drop-down box to open it, then click the desired job code
3. Change an employee's 'clocked in' status, if needed (e.g. when adding a segment for a current day, while the employee is still working)
 - a. Check the box to eliminate the employee's **Time out**
 - i. This will cause the employee to be 'clocked in' and allow them to clock out at the end of the day
4. Input a note in the **Note** field to briefly describe why a change was made (e.g. 'Employee forgot to clock in')
5. If multiple *identical* work days are needed in sequence, change the **Days** field to the number of consecutive days to apply the new segment to (e.g. selecting '3' with a start date of Tuesday will create the segment on Tuesday, Wednesday, and Thursday, all with the same job code, start time, end time and notes)
6. Click **Save** to finalize changes

Delete a segment

1. Select one (**Group Hours** or **Individual Hours**) or more (**Individual Hours only**) segment(s) to delete
2. Click **Manage**, then click **Delete**
3. The confirmation message '**Are you sure you want to delete the selected segment(s)?**' appears – click **Ok** to confirm, or **Cancel** to reject

Add an unpaid lunch break

1. Select the segment that will have a lunch break applied
2. Click **Manage**, and then click **Add Break**
3. If applicable, change the start time of the break in the **Time** field
4. Input the length of the break, in minutes, in the **Break length** field (e.g. 30 for a half hour, 60 for an hour)
 - a. Use 15-minute increments (e.g. 30, 45, 60, etc.)
5. **Break type** defaults to lunch; leave the default in place
6. Input a note in the **Note** field to briefly describe why a change was made (e.g. 'Employee did not clock out for lunch')
7. Leave **First Segment** selected in the **Track information goes with** field
8. Click **Save** to finalize changes
9. The segment will split into two segments at the indicated time, connected by a bracket, with the break length displayed in the **Break Length** column

Split a segment

- This function is performed when an employee has more than one job, and needs to have a single segment split between those two jobs (e.g. an Instructional Assistant who worked part of the day in a 'sub for teacher' role)
 - This function can also be used if an employee with cost codes continued to work in the same job, but needs a cost code change mid-segment (e.g. a PLACE employee who changed sites mid-segment, and forgot to change cost code)
1. Select the segment that will be split
 2. Click **Manage**, and then **Split Segment by Length**
 3. Click the **Split** icon in the left-hand column
 4. Edit the time and break length of the first segment of the split
 - a. Change the **Out** time, if applicable
 - i. The **Length** field and the next segment's **In** time will both change to match the new **Out** time
 - b. Change the **Length** in the **Break** column, if applicable
 - i. The **Length** field and the next segment's **In** time will both change to match the new **Out** time
 5. Change the **Job Code** of the first segment, if applicable

6. Change the **Cost Code** of the first segment, if applicable
7. Change the **Job Code** of the second segment, if applicable
8. Change the **Cost Code** of the second segment, if applicable
9. If a segment requires more than one 'split', click the **Split** icon on the second segment
 - a. This creates a new split, resulting in three segments – all these segments can be edited following the above steps
 - b. Ensure that each segment's **In** and **Out** times are consistent with adjacent segments (e.g. segment one ends at 11:00 AM, so segment two must start at 11:00 AM, and segment two ends at 12:00 PM with a 30-minute lunch, so segment three must start at 12:30 PM)
10. When all segments have been split and edits are complete, click **Save**