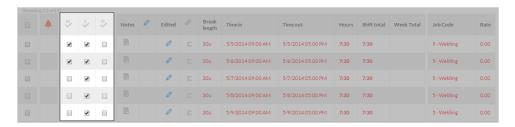


- 1. Click on the **Note** icon in the **Notes** column.
- 2. In the **Manage Work Segment Notes** window you will see a list of all notes entered, with the date entered, the User ID that entered the note, and the text of the note itself.
- 3. To edit a note, click on the // icon. This will allow you to enter in new text for the note.
- 4. To delete a note, click on the icon. This will permanently delete the note.
- 5. To add a new note, click on the **Add** button. This will add a new note to the segment.

# **View Hour Edit History**

When hours are edited, it creates an entry in the **Hours Audit Log**. This allows you to see who edited a segment, as well as the date the edit occurred and what information was changed. This information can also be viewed within **Individual Hours** by right-clicking on a segment and selecting **Audit Log**. Each edit made to the segment can be seen on this screen, as well as what information changed between each edit.

# **Approving Shifts**



If any of the approval types are required for your employees, you will be unable to close weeks if you have unapproved segments. To approve a segment, click on the checkbox under the appropriate header (**M** for **Manager**, **E** for **Employee**, and **O** for **Other**). To approve all the segments currently displayed for the employee, click on the appropriate approval column headers.

Once the approval boxes have been checked, you can then click on the blue **Apply Approval** button to lock the approvals into the system, or the gray **Discard Approval** button to clear out the changes.

# **Approving Exceptions**



**TIP**: Depending on the employee's settings in the **Exceptions** tab, you may not be able to close the week or run reports with unapproved segments.

- 1. If a segment has an exception, a dot will appear in the **Exception** column. If a blue dot appears, the segment has one or more exceptions that are tracked for that employee. If a red dot appears, the segment has one or more exceptions that will prevent the week from closing until those exceptions are rectified or approved, at which point the blue dot will appear.
- 2. Select one or more segments with an exception. Right click on the segment(s) or hover over the **Manage** button to view the exceptions.

© Data Management, Inc. All rights reserved. This documentation may change without notice. | Rev. 2/19/2016



To approve exceptions, select the **Approve** radio button. If the exception would prevent the week from closing or reports from running with this employee, the red dot in the exception column will become a blue dot.

### **Mass Approving Exceptions**

All exception types for the displayed range can be approved or unapproved at once by selecting the **Resolve Period** button and choosing which exceptions you would like to approve.

**NOTE**: Resolving exceptions will resolve ALL exceptions in that time frame, not just the ones visible on the page.

### **Toggle Breaks**

If an employee forgot to take a break, or if you just want to tie together segments with a break, you can manually do so.

- 1. Select the segment you want to enable a break after.
- 2. Select **Manage** and click on **Toggle Break**. This will tie the segment together with the one below it, as long as the gap between the two is within the maximum break length.

#### **Splitting Segments**

#### Split Segment by Length

- Right click on a segment, or select a segment and click on the Manage Segments button. Select Split segment by length.
- 2. You can then split a segment up by clicking on the icon in the wizard that appears.
- 3. Once the segment has been split, specify a segment length in the **Length** column, or by specifying a time for the segment change in each respective field in the **Time** column.
- 4. Click **Save** to commit the changes to the database.

#### Split Seament by Percentage

- Right click on a segment, or select a segment and click on the Manage Segments button. Select Split segment by percentage.
- 2. You can then split a segment up by clicking on the icon in the wizard that appears.
- 3. Once the segment has been split, specify a segment percentage in the **Length** column, or by specifying a time for the segment change in each respective field in the **Time** column.
- 4. Click **Save** to commit the changes to the database.

#### **Add Break**

- Right click on a segment, or select a segment and click on the Manage Segments button. Select Add break.
- 2. A window will appear allowing you to specify the time of the break, as well as the break type and length of the break. You can also specify where any applicable tracked information will go after the split occurs.
- 3. Click **Save** to commit the changes to the database.

© Data Management, Inc. All rights reserved. This documentation may change without notice. | Rev. 2/19/2016