Time Manager User's Guide

Setting up and using Shift Clock And Job Clock functions MANAGER SE / SHOPKEY SHOP MGMT. SE

VERSION 8.4.0.x UPDATE

Dec 2021

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Requirements

- Manager SE (Teamworks) or ShopKey Pro SE version 8.4.0.x or higher
 - Service Writers and Technicians are setup in Configurations
 - To see how to setup Service Writers/Technicians <u>Click Here</u>

NOTE: Using Time Manager in a secure manner depends on your Program Security configuration. If you already have it setup, proceed with the steps below. If you haven't yet implemented security, review text / videos here: https://buymitchell1.net/managerhelp/Programsecurity.htm

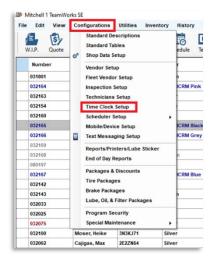
Overview

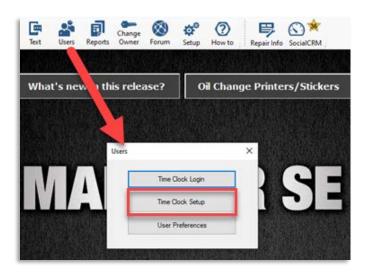
- Time Manager is a suite of time management tools that can be customized to each shop.
 - o The 'login' step provides Time Manager access; then users 'clock in' to work as appropriate.
 - o Employees access login / clocks on shop's local network with a computer, cellphone or tablet.
- Current Activity dashboard allows owners / managers to see who's clocked in and which technicians
 are clocked in on labor jobs.
- Shift Clock allows Service Writers and Technicians to clock in and out for a workday shift.
- **Job Clock** Technicians are able to start and pause their time on their assigned labor item(s).
 - When technicians use this feature their clocked time automatically fills the Actual Hours field in the R.O. for the labor item. Shops can confirm productivity without manual intervention.

NOTE: If Job Clock for Technicians is utilized, shops can use the Technician Time Card screen to pay techs for labor items completed during a pay period without having to first post those as Invoices.

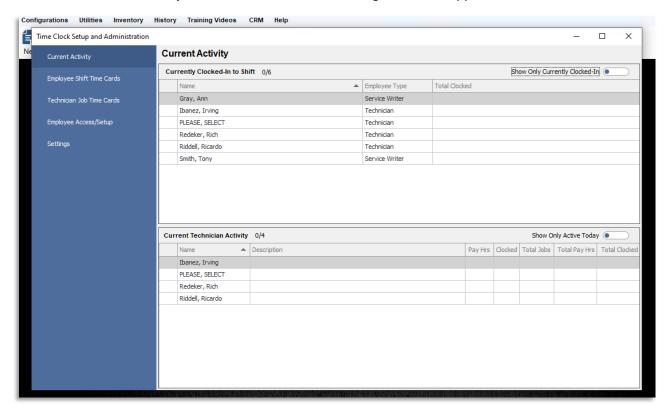
Time Clock Setup (inside SE)

To access, click on Configurations menu > select Time Clock Setup.
 NOTE: You may also click on Users icon > select Time Clock Setup.





Once Time Clock Setup has been selected, the following screen will appear:



• Current Activity functions as a dashboard to allow owners / managers to see who's clocked in for the work day and also which technicians are currently clocked in on labor jobs in Repair Orders.

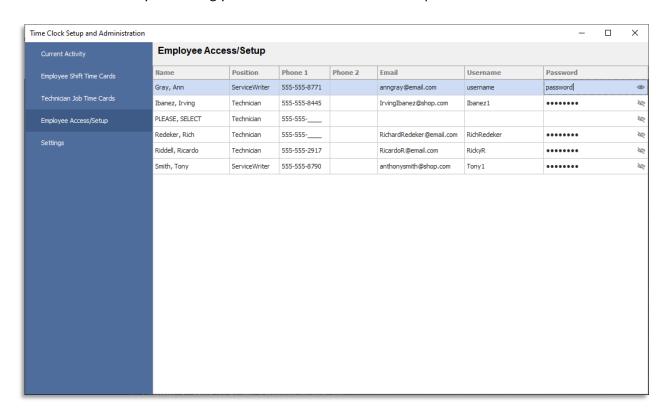
NOTE: The Job Clock function is for active Repair Orders only; orders in either the Estimate phase (unapproved work) or Invoice stage (finished work) are not factored.

Employee Access/Setup (inside SE)

- **Employee Access / Setup** is where service advisor and technician usernames and passwords are managed to access the Shift Clock or Job Clock screens according to their roles in the shop.
 - Name and Position data content is inherited from Manager SE- Technician Setup; any changes to these values must be made from inside the employee record in Technician Setup.
 - o Phone 1, Phone 2, Email can be entered/edited by clicking directly into the desired field.
 - Existing phone numbers and/or email addresses entered in Manager SE Technician
 Setup will be displayed. Changes made here update those fields inside Manager SE.
 - Username / Password are required for employees to access Shift Clock or Job Clock screens.
 - Passwords are hidden from view by default.
 - To view the current password associated with a user select the 'eye' icon directly to the right of the password. To hide once more, select the eye icon again.

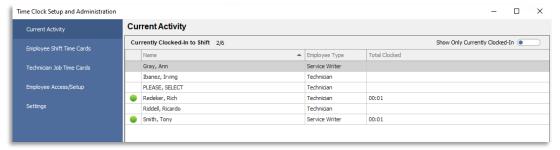
NOTES:

- If an employee elects not to create credentials here for Time Clock Portal, they will not be able to log in to access the Shift Clock or Job Clock and associated time card screens on their mobile devices.
- The password for Time Clock access is completely different than a password set in Program Security. It's strongly recommended to have different passwords for each area.



Current Activity (inside SE)

- Current Activity screen provides an overview of current clocked status of employees and technicians.
 - Under Currently Clocked-In to Shift, the following employee information is displayed:
 - Employee Name / Employee Type / Employee Hours
 - The green dot next to the employee's name indicates that they are Clocked In for their shift.
 - Currently Clocked-In to Shift [top portion of Current Activity screen] in default view:



o View can be filtered with Show Only Currently Clocked-In option engaged. (top right corner)



- o Under Current Technician Activity, the following work assignment information can be found:
 - Name Technician performing the work
 - Description work being performed [Work Requested]
 - Pay Hours time the technician is being paid for current job
 - Clocked Hours time the technician has clocked for current job
 - Total Jobs number of jobs the technician has completed so far that day.
 - **Total Pay Hours** number of hours the technician is being paid so far that day.
 - Total Clocked number of hours the technician has clocked so far that day.
- A green dot next to technician name indicates that they are Clocked In to assigned labor job.
- Current Technician Activity (bottom portion of Current Activity screen) in default view:

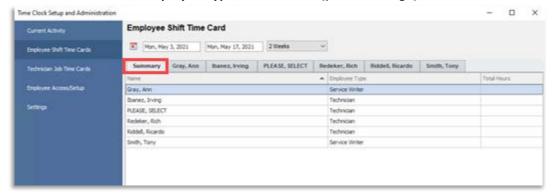


View can be filtered with Show Only Active Today option engaged. (top right corner)

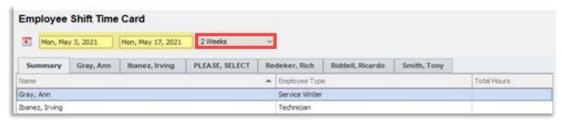


Employee Shift Time Cards (inside SE)

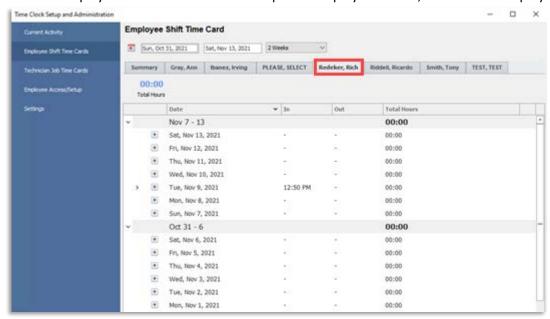
- Employee Shift Time Card records the total hours clocked for an employee's shifts.
 - Under the Summary tab, the following employee information is displayed
 - Name / Employee Type / Total Hours [per date range]



The Summary tab can be filtered or expanded by using the date range controls provided.
 Default period settings include 2 Weeks, 1 Week or 1 Day.

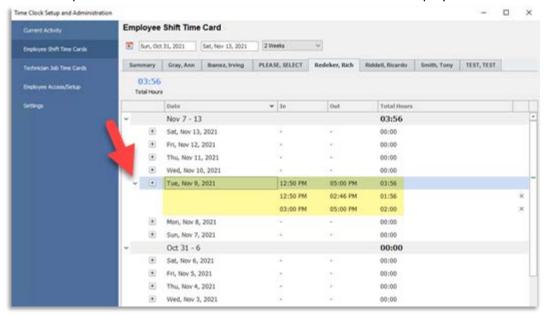


To display a detailed breakdown of a specific employee's shifts, click on that employee's tab.

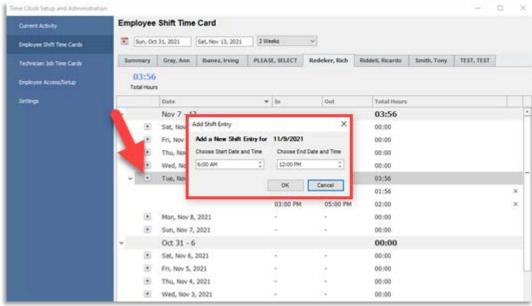


Additional Employee Shift Time Card options are shown on the following page.

- As with the Summary tab, the selected Employee tab can be filtered or expanded by using the date range controls provided. Default period settings include 2 Weeks, 1 Week or 1 Day.
- o An arrow [>] appears to the left of any Date with hours clocked. Clicking this arrow will open a drop-down that lists the **In** and **Out** times recorded for the employee's shift for that day.

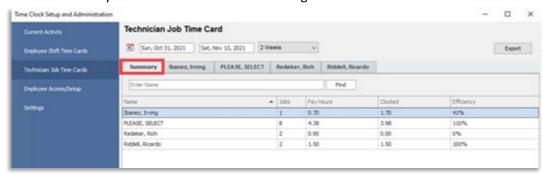


o If deemed necessary (with security permissions), a new shift entry can be manually input by selecting the "Plus [+] icon directly to the left of that date. Adjust the times accordingly.

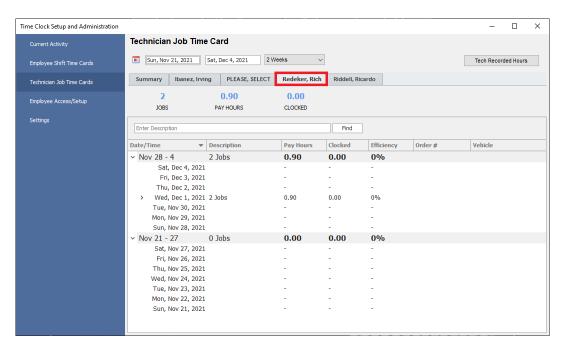


Technician Job Time Cards (inside SE)

- Technician Job Time Cards tracks the total hours worked for a technician's shift
 - Under the Summary tab, the following technician job information can be found
 - Name Technician performing the work
 - **Jobs** number of jobs each technician has completed within this date range.
 - Pay Hours number of hours the technician is being paid within this date range.
 - Clocked time each technician has clocked within this date range.
 - Efficiency productivity measured by comparing technician's Clocked Hours to the Pay Hours for the selected date range.

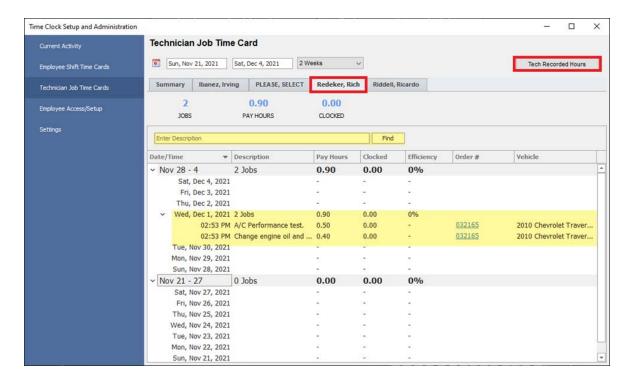


- The Summary tab can be filtered or expanded by using the date range controls provided.
 - Default period settings include 2 Weeks, 1 Week or 1 Day.
- An Export option (top right corner) is provided to save Summary information in either PDF or Excel file formats.
- o To display a detailed breakdown of a specific technician's hours, click on that technician's tab.



o Additional Technician Job Time Card options are shown on the following page.

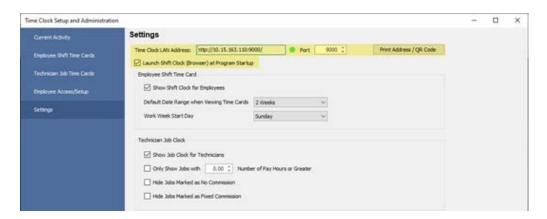
- Selecting a specific technician retains Summary information while also providing the ability to review the hours this technician clocked per labor item on currently open repair orders. This can be done by clicking the arrow [<] directly to the left of the selected date.
- After selecting the arrow [<] the following additional information will become visible:
 - Description (Labor Items)
 - Order # [hyperlink to R.O.]
 - Vehicle (Year-Make-Model)



- o Clicking on Order # directly will open the work order in Manager SE to review labor details.
- By entering text in the search field (labeled Enter Description) and clicking Find, labor items
 on repair orders currently assigned to that technician can be located and reviewed.
- As with the **Summary** tab, the selected Employee tab can be filtered or expanded by using the date range controls provided.
 - Default period settings include 2 Weeks, 1 Week or 1 Day.
- o The **Tech Productivity Report** option (upper right corner) can be used to print a report for the technician labor data within the date range currently selected.

Settings (inside SE)

The Settings screen controls the main options of Time Manager including its activation.



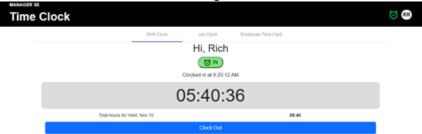
 Time Clock LAN Address controls how users access the Time Clock Portal to log in and gain access to the Time Manager features enabled.

NOTE: The **Port** # can be changed if necessary; most shops will not need to touch this. We recommend this port setting be kept at **9000** for simpler connection and administration.

 Print Address / QR Code provides a scannable QR code that users can scan using their smartphone or tablet camera to access the Time Clock portal quickly from their devices.



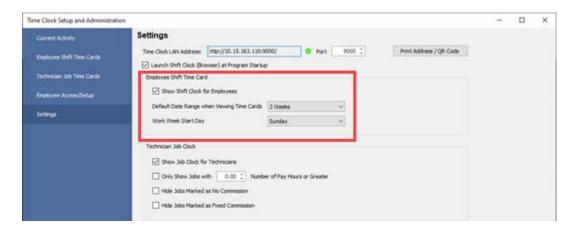
 Launch Shift Clock (Browser) at Program Startup opens the Time Clock Portal in a separate browser window whenever Manager SE software is launched. This setting is <u>per workstation</u>.



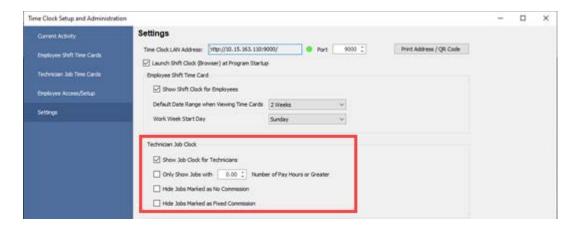
NOTE: If Show Shift Clock for Employees is not engaged, a user would see Job Clock only.

Additional Settings options are shown on the following page.

- o Employee Shift Time Card settings specific to employees using the Time Clock Portal
 - Show Shift Clock for Employees [checkbox to make available]
 - Default Date Range when Viewing Time Cards can be set to 1 day, 1 week, or 2 weeks
 - Work Week Start Day can be set for any day of the week



- Technician Job Clock settings specific to technicians using the Time Clock Portal
 - Show Job Clock for Technicians [checkbox to make available]
 - Only Show Jobs with [minimum threshold] number of Hours or Greater
 - Hide Jobs Marked as No Commission (applies filter)
 - Hide Jobs Marked as Fixed Commission (applies filter)



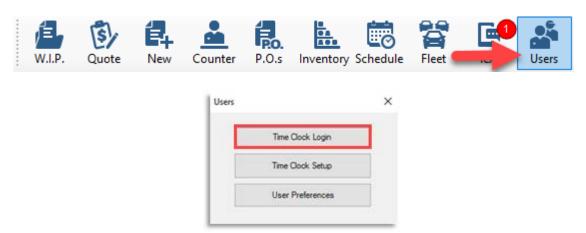
When Show Job Clock for Technicians option is not enabled, a technician would instead see a screen lacking any labor job clock details, similar to this:



Time Manager Access/Login (in WEB browser)

• To access and login to the **Time Clock Portal** from Manager SE initially, select the **Users** icon and select **Time Clock Login** from the following window.

NOTE: Once the Time Clock Portal is opened in the browser on your device, bookmark it for future access.



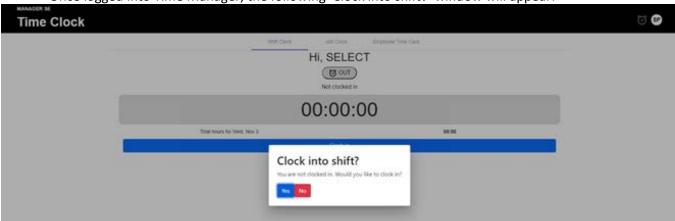
NOTE: Time Clock Setup includes an option to launch the Shift Clock log-on automatically when Manager SE is opened on a selected workstation PC. Refer back to page 12 for details.

• Once **Time Clock Login** has been selected a web browser will open the following window, employees should then enter their Username and Password and click on **Login**.



Shift Clock In/Out (in WEB browser)

• Once logged into Time Manager, the following 'Clock into shift?' window will appear:



- Employees: Selecting **Yes** will 'Clock In' the service writer and provide them with <u>full access</u> to:
 - Shift Clock
 - o Employee Time Card
- Selecting **No** will not 'Clock In' the service writer, instead providing <u>read-only access</u> to:
 - Shift Clock
 - o Employee Time Card



NOTE: Access to **Shift Clock** is controlled by **Settings** options > **Show Shift Clock for Employees**.

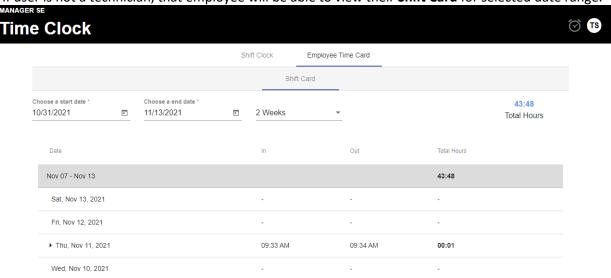
- Technicians: Selecting **Yes** will 'Clock In' the technician and provide them full access to:
 - Shift Clock
 - Job Clock
 - Employee Time Card
- Selecting **No** will not 'Clock In' the technician, instead providing <u>read-only access</u> to:
 - Shift Clock
 - Job Clock
 - o Employee Time Card



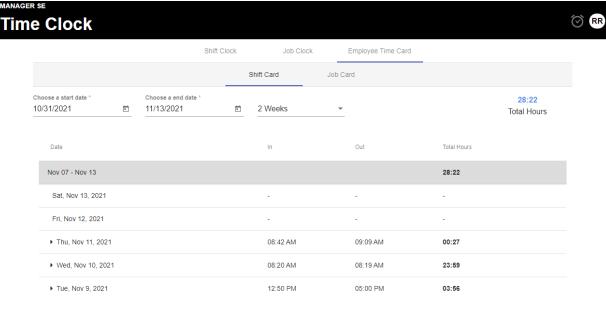
NOTE: Access to **Job Clock** is controlled in **Settings** > **Show Job Clock for Technicians**.

Employee Time Card (in WEB browser)

• If user is not a technician, that employee will be able to view their **Shift Card** for selected date range.



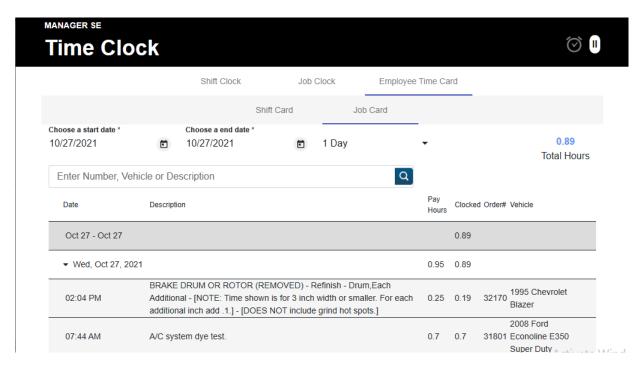
If user is a technician, they're able to view both their Shift Card and Job Card for selected date range.



Technician Job Card is explained on the following page.

Technician Job Card (in WEB browser)

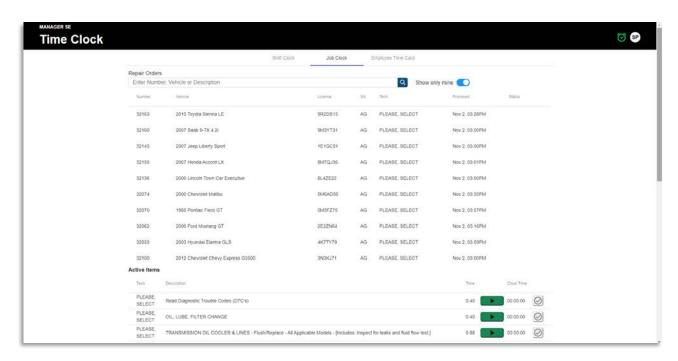
- Job Card allows technicians to review their completed jobs, including pay hours versus clocked hours.
 - o The following information is included for each job listed:
 - Description
 - Pay Hours
 - Clocked Hours
 - Order #
 - Vehicle
- By using the search field (labeled 'Enter Number, Vehicle or Description'), only information matching the word or phrase entered will then be displayed. Dismissing the search term returns full display.
- Technician **Job Card** displays using 1 day, 1 week or 2 weeks defaults. This view can be filtered more specifically by a selected date range using the Choose a start date / end date controls provided.



Technician Job Card is continued on the following page.

Technician Job Clock (in WEB browser)

Job Clock provided technicians with the ability to interact with their jobs that are currently open.



- o Selecting will allow a user to start the job clock and track hours worked on that job.
- Selecting will allow a user to pause a job that will be continued later.
- O Selecting will allow a user to mark that job as complete. This moves it from the Active Items list to the Completed items section.
- If a technician is clocked in on a job, activity will be reflected and visible in Current Activity >
 (green dot) in Current Technician Activity. If the technician pauses that job, and another job
 is not clocked into, they will no longer reflect job activity. (examples below)

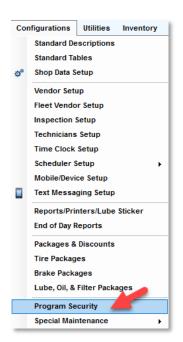


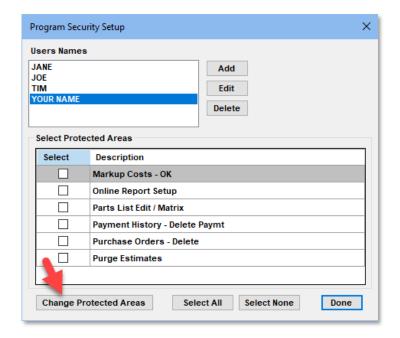
• **NOTE**: Even when all Active Items are completed, the repair orders and vehicles remain under Repair Orders section until the repair order's promised time is reached.

Program Security (inside SE)

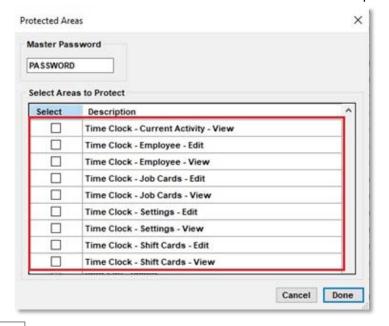
NOTE: Using Time Manager in a secure manner depends on your Program Security configuration. If you already have it setup, proceed with the steps below. If you haven't yet implemented security, review text / videos here: https://buymitchell1.net/managerhelp/Programsecurity.htm

- Time Clock options have been added to the list of potential protected areas in Program Security.
 - To access Program Security, select Configurations > Program Security.
 - It will initially display with currently protected areas that require a password.
 - o Click on Change Protected Areas to review the full alphabetical list of program areas.





Below is the list of the new Time Clock areas to be protected by user passwords.



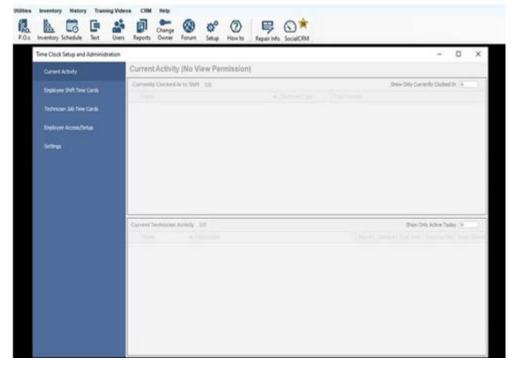
Each area selected to be a protected area will prompt for the validation password when attempting to access or select that protected area within Time Clock.



If an invalid* password is entered, the screen will remain grayed out as explained in the images shown on the following page.

invalid = incorrect or a password not assigned to access the protected area

- Example: Entry of <u>invalid</u> Manager SE password results:
 - o The Time Clock Setup and Administration window displays dimmed without any data visible until a valid Manager SE password is entered in the Password Validation window.



- When the correct password is entered, the window will display screen options and permit access as defined in Program Security Protected Area settings.
- **Time Clock Setup and Administration** areas with visible results of invalid passwords are listed in the table below by Time Clock Setup section:

Time Clock Setup and Administration	Password Protected Areas with <u>Failed</u> Password Results
Current Activity	Current Activity - info will not display
Employee Shift Time Cards	Shift Cards – Edit = info will show but editing disabled Shift Cards – View = info will not show [no edit options]
Technician Job Time Cards	Job Cards – Edit = info will show but editing disabled Job Cards – View = info will not show [no edit options]
Employee Access/Setup	Employee – Edit = info will not show PW column + editing disabled Employee – View = info will not show [no edit options]
Settings	Settings – Edit = info will show but disable editing Settings – View = info will not show [no edit options]