Paychex Flex® Time
Employee Dashboard User Manual

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Employee Dashboard

The Employee Dashboard is designed to give you an overview of your time at work. It is broken down into 7 sections:

- Actions Bar
- Actions
- Schedules
- Time Off
- Messages
- Time Card
- Reports

Figure 1

This user guide will explain how to use each section.

Figure 2

The Actions Bar

The Actions Bar, as seen above, is the first of two web-punching methods available to you on the Employee Dashboard. It is the quickest way to save a punch with your default Labor Level settings.

The Actions Bar is customizable so you may or may not see all of the icons pictured above. The available actions are Clock In, Begin Break, End Break, Begin Meal, End Meal, Transfer and Clock Out. The details of each are explained below.

Last Punch: This information shows the last captured punch, and based on that punch it will show a prompt for the next most likely punch. In Figure 2, the last punch showing is a Clocked Out punch and it is prompting a Clock In punch.

Clock In icon: Click this icon to clock in.

Begin Break icon: Click this icon to begin your break.

End Break icon: Click this icon to end your break.

Begin Meal icon: Click this icon to begin your meal.

End Meal icon: Click this icon to end your meal.

Transfer icon: Click this icon to transfer from one department to another.

Clock Out icon: Click this icon to clock out.

After each punch is entered, a “Punch was saved” message displays confirming the punch was saved into your timecard, as seen below.

Figure 3

Actions

The Actions icon is the second of two web-punching methods available to an employee on the Employee Dashboard. These differ from the Actions Bar icons because they require more data to be entered. You should punch using the Actions icon anytime you are punching into labor levels that are not your default settings.

Figure 4

When you click the Actions icon, screen displays with a combination of these tabs to choose from: Punch, Time Sheet Entry, Period Entry, Percentage Entry, Template Entry and Express Entry. Each of these tabs will be defined and explained in this section.

Note: If your screen looks different if your administrator has not enabled some of these options.

There may be any combination of these tabs to choose from: Punch, Time Sheet Entry, Period Entry, Percentage Entry, Template Entry and Express Entry. Each of these tabs will be defined and explained in this section.

Punch Tab

The punch tab enables you to view the current day's entries and to enter punches with more detail. This screen shows the current date, your status (for example, Working), your schedule for the day, your punches for the day and the punch icons.

Note: Labor Levels are a customizable feature. The labor levels listed in this section (Location, Department, Sub-Department, Job) are examples and may be labeled differently for your company.

Clock In

1. Click **Clock In**. The Clock In screen displays.
2. Select the labor levels as needed.

   Note: The default assigned labor levels will appear automatically. Additional drop-down menus may be available for one or more labor levels.

3. Enter a note in the **Notes** field as needed to be viewed by your supervisor.
4. Click **Save**.

Clock Out

1. Click **Clock Out**. The Clock Out screen displays.
2. Select the labor levels as needed.

   Note: The default assigned labor levels will appear automatically. Additional drop-down menus may be available for one or more labor levels.

3. Enter a note in the **Notes** field as needed to be viewed by your supervisor.
4. Click **Save**.

Begin Break

1. Click **Begin Break**. The Begin Break screen displays.
2. Select the labor levels as needed.

   Note: The default assigned labor levels will appear automatically. Additional drop-down menus may be available for one or more labor levels.

3. Enter a note in the **Notes** field as needed to be viewed by your supervisor.
4. Click **Save**.

Transfer

1. Click **Transfer**. The Transfer screen displays.
2. Select the labor levels as needed to transfer from one to the other.
3. Enter a note in the **Notes** field as needed to be viewed by your supervisor.
4. Click **Save**.

End Break

1. Click **End Break**. The End Break screen displays.
2. Select the labor levels as needed.

   Note: The default assigned labor levels will appear automatically. Additional drop-down menus may be available for one or more labor levels.

3. Enter a note in the **Notes** field as needed to be viewed by your supervisor.
4. Click **Save**.

Begin Meal

1. Click **Begin Meal**. The Begin Meal screen displays.
2. Select the Labor Levels as needed.

   Note: The default assigned labor levels will appear automatically. Additional drop-down menus may be available for one or more labor levels.

3. Enter a note in the **Notes** field as needed to be viewed by your supervisor.
4. Click **Save**.

End Meal

1. Click **End Meal**. The End Meal screen displays.

2. Select the labor levels as needed.

   Note: The default assigned labor levels will appear automatically. Additional drop-down menus may be available for one or more labor levels.

3. Enter a note in the **Notes** field as needed to be viewed by your supervisor.

4. Click **Save**.

Time Sheet Entry Tab

The Time Sheet Entry tab enables you to enter your work or non-work time without punching.

Note: You may not see this tab if this feature is not enabled. In addition, the screen may appear differently depending on how the usage was enabled.

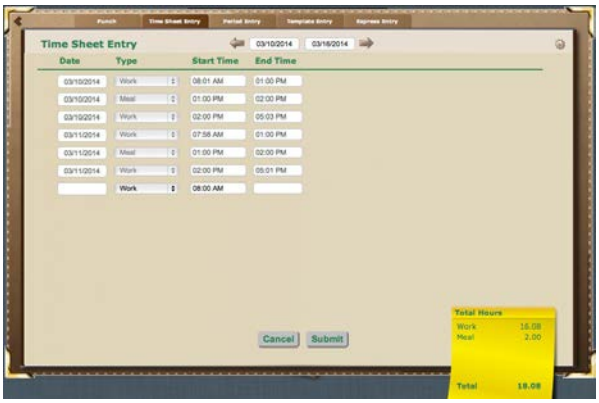

Figure 5

Adjusting Column View

1. Click **Gearshift** in the top right corner of the screen. The Settings screen displays.

Figure 6

2. Select settings based on your viewing preferences.

3. Click **Save**. The Time Sheet Entry screen reflects those changes as seen below.

Figure 7

Entering Work Time

1. Use the arrows at the top of the screen to select the correct date range.
2. Select the type of work hours from the drop-down menu next to the corresponding date.
3. Enter in the time worked.

   Note: Depending on your company's configuration, the time may be entered in as a start and end time, a start time with total hours worked or just total hours worked.

4. Enter information in additional columns as needed.
5. Repeat steps 2 - 4 as needed.
6. Click **Submit**.

Entering Non-Work Time

1. Use the arrows at the top of the screen to select the correct date range.
2. Select the type of non-work hours from the drop-down menu next to the corresponding date.
3. Enter in the non-work hours.

   Note: Depending on your company's configuration, the time may be entered in as a start and end time, a start time with total hours worked or just total hours worked.

4. Enter information in additional columns as needed.
5. Repeat steps 2 - 4 as needed.
6. Click **Submit**.

Period Entry Tab

The Period Entry tab enables you to enter your time as a total for a specified period of time.

Note: You may not see this tab if this feature is not enabled.

Adjusting Column View

1. Click **Gearshift** in the top right corner of the screen. The Settings screen displays.

Figure 8

2. Select settings based on your viewing preferences.

3. Click **Save**.

Entering Work Time

1. Select the date range by using the arrows at the top of the screen as seen below.

Figure 9

2. Select the type of work hours from the drop-down menu.

3. Enter in the total time worked for the time period.

4. Enter information in additional columns as needed.

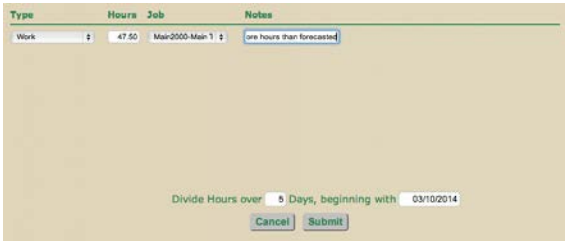

Figure 10

5. Select the number of days for the hours to be distributed over.

6. Enter the date to begin the distribution of hours.

7. Click **Submit**. The hours display in the top portion of the screen as seen below.

Figure 11

Your time card displays the hours distributed evenly across the days selected as seen below.

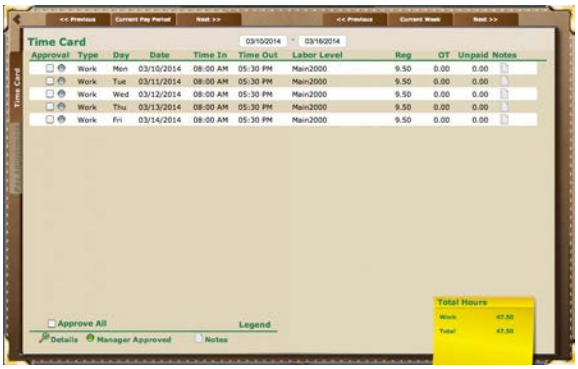

Figure 12

Entering Non-Work Time

1. Select the date range by using the arrows at the top of the screen as seen below.

Figure 13

2. Select the type of non-work hours from the drop-down menu.

3. Enter in the total time worked for the time period.

4. Enter information in additional columns as needed.

5. Select the number of days for the hours to be distributed over.

6. Enter the date to begin the distribution of hours.

7. Click **Submit**.

Percentage Entry Tab

The Percentage Entry tab is used by salaried employees to track time worked on various projects. Percentages of time are entered for each project within a specified date range.

Note: You may not see this tab if this feature is not enabled. In addition, the screen may appear differently depending on how the usage was enabled.

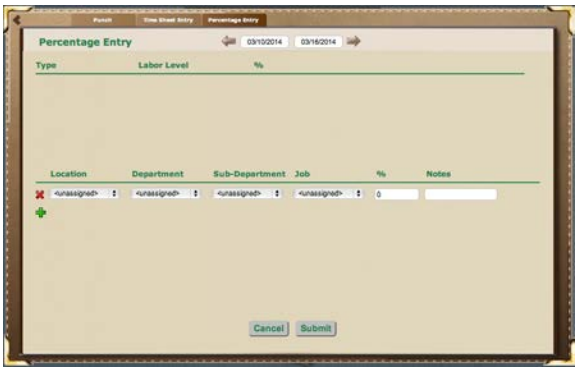

Figure 14

Submitting Percentage Entries

1. Select the date range by using the arrows at the top of the screen.
2. Enter in the labor levels and the corresponding percentages as needed.
3. Click **Add** to add more entries. Repeat steps 2 and 3 as needed.

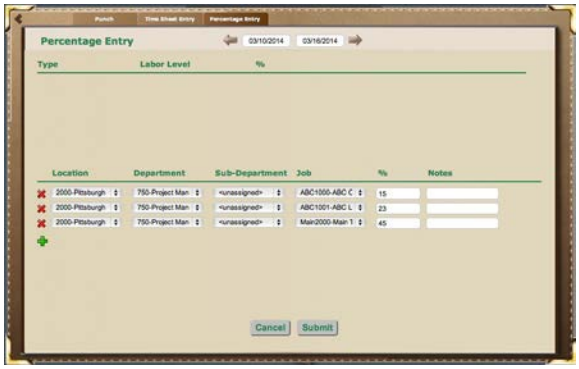

Figure 15

4. Click **Submit** when you are finished.

   a. If you enter percentages totaling more or less than 100, an error message displays as seen below.

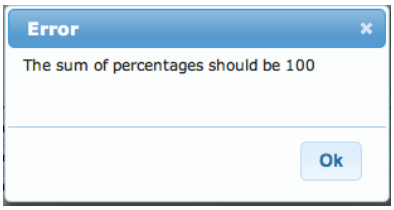

Figure 16

   b. Click **Ok**.

   c. Re-enter the percentages so they total 100%.

   d. Click **Submit** when you are finished.

Note: The time worked is listed from highest to lowest percentage worked as seen below.

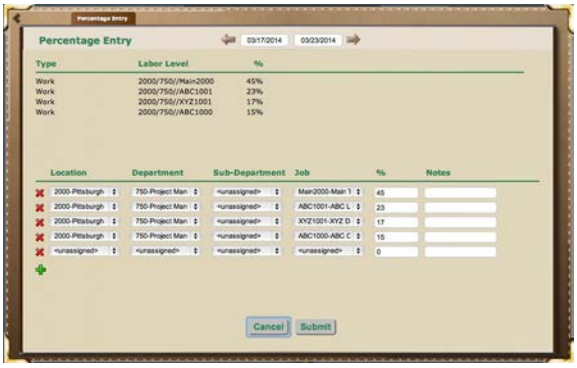

Figure 17

Editing Percentage Entries

1. Select the date range by using the arrows at the top of the screen.
2. Change the labor levels, percentages, and/or notes as needed.
3. Click **Submit** when finished.
   a. If you enter percentages totaling more or less than 100, an error message displays as seen below.

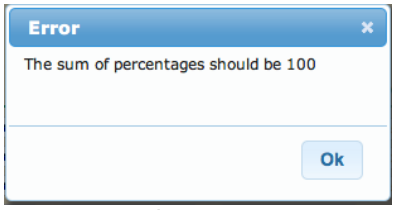

Figure 18

   b. Click **Ok**.
   c. Re-enter the percentages so they total 100%.
   d. Click **Submit** when you are finished.

Note: The time worked is listed from highest to lowest percentage worked.

Deleting Percentage Entries

1. Select the date range by using the arrows at the top of the screen.
2. Click **Delete** next to the line item you wish to delete to remove the entire line item.
3. Submitting Percentage Entries if your percentages do not total 100.

Template Entry Tab

The Template Entry tab enables you to enter your work or non-work time from a schedule or a pre-defined template.

Note: You may not see this tab if this feature is not enabled. In addition, the screen may appear differently depending on how the usage was enabled.

Generating the Template Entries from the Schedule

1. First check to see that you have a schedule for the time period in question by clicking **Schedule**.

2. Once the schedule has been verified, click **Actions** and select the Template Entry tab.

3. Select the date range by using the arrows at the top of the screen as seen below.

Figure 19

4. Click **Generate from Schedule**

. The week populates based on the schedule shown in Step 1.

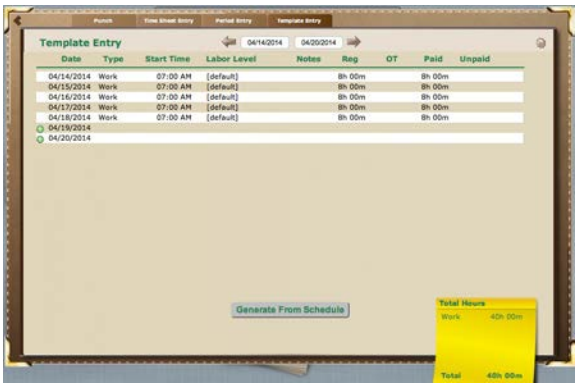

Figure 20

Adding Template Entries

1. Select the date range by using the arrows at the top of the screen as seen below.

Figure 21

2. Click **Add Entry** next to the date you wish to enter time. The time (as defined by the predefined template) displays next to the corresponding date.

3. Repeat Step 2 as necessary to complete the week.

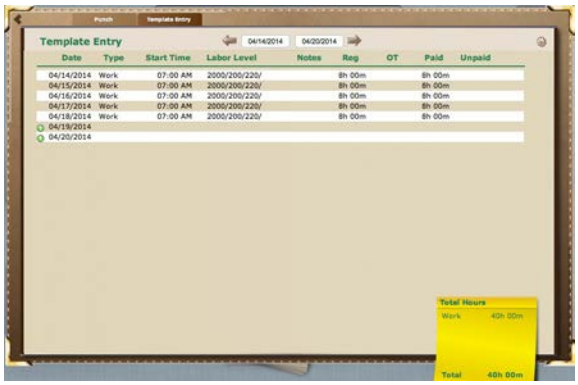

Figure 22

Adding Entries by Changing the Predefined Template

1. Select the date range by using the arrows at the top of the screen as seen below.

Figure 23

2. Click **Gearshift** in the top right corner of the screen. The Template Entry Settings screen displays as seen below.

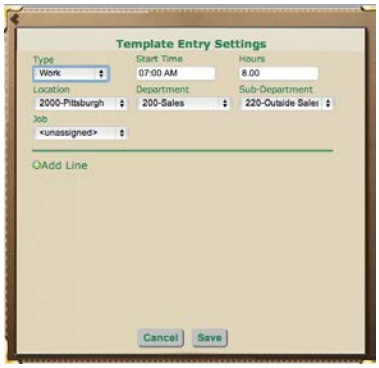

Figure 24

3. Make any necessary changes to the fields listed.

4. Click **Add Line** to make additional entries for any given day.

   Note: This is sometimes used when you are transferring from one labor level to another.

5. Click **Save** when you are finished. You are taken back to the Template Entry screen.

6. Click **Add Entry** next to the date you wish to enter time. The time (as defined by the predefined template) displays next to the corresponding date.

7. Repeat Step 5 as necessary to complete the week. Below is an example of how the screen might appear with a change from work to non-work using the pay type of “Personal Time”.

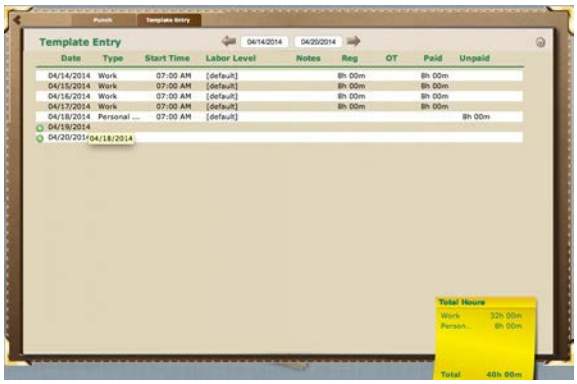

Figure 25

Express Entry Tab

The Express Entry tab enables you to enter your work or non-work time for a specified time frame quickly and without punching. There can be multiple entries for any given day.

Note: You may not see this tab if this feature is not enabled. In addition, the screen may appear differently depending on how the usage was enabled.

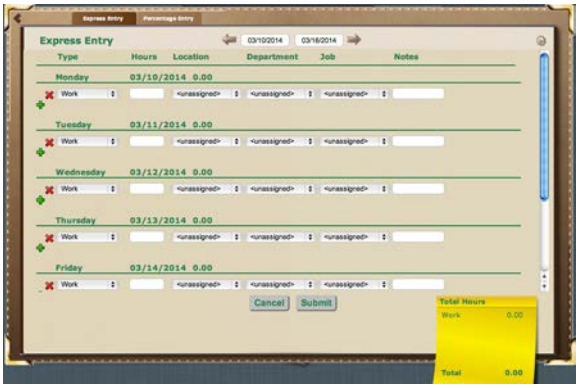

Figure 26

Adjusting Column View

1. Click **Gearshift** in the top right corner of the screen. The Settings screen displays.

Figure 27

2. Adjust the columns based on your preferences.

3. Click **Save**.

Submitting Express Entries

1. Select the date range by using the arrows at the top of the screen.

2. Enter the type of work or non-work pay type.

3. Enter the time worked.

   Note: Depending on your configuration, the time may be entered in as a start and end time, a start time with total hours worked or just total hours worked.

4. Enter information in additional columns as needed.

5. Click **Add** to add more entries for any given day.

6. Repeat Steps 2 - 5 as needed.

7. Click **Submit**.

Editing Express Entries

1. Select the date range by using the arrows at the top of the screen.

2. Edit the fields for any day as needed as explained in the previous section, Submitting Express Entries.

3. Click **Submit**.

Deleting Express Entries

1. Select the date range by using the arrows at the top of the screen.

2. Click **Delete** next to any line item to remove it.

3. Make any necessary adjustments to the Express Entry as explained in the previous sections.

4. Click **Submit**.

Time Off

Time Off Requests enables you to view your time off accruals, submit time requests and view your scheduled time off and that of your co-workers. The Time Off icon shows your current time off balance as seen below.

Figure 28

Note: The non-work pay type(s) (for example, PTO, Vacation, Sick Time, etc.) listed will be based on the benefits your company offers. In addition, this section may be grayed out if your company does not utilize this feature.

When you click **Time Off** , the Time Off Accruals screen displays as pictured below.

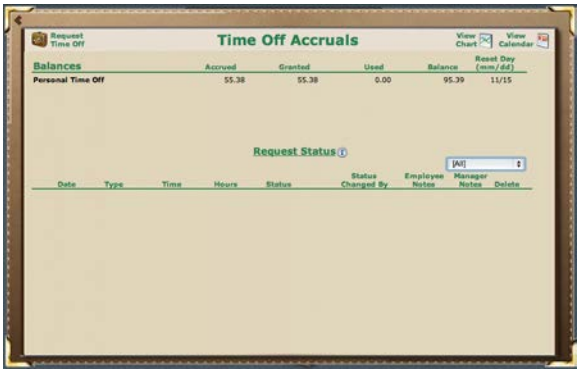

Figure 29

Balances: This lists the non-work pay types available to you.

Accrued: This number shows the total number of hours that have been accrued/earned since the last reset date.

Granted: This number shows the total number of hours that have been accrued/earned plus any additional hours given to you since the last reset date.

Used: This number shows the total number of hours that have been used since the last reset date.

Balance: This number shows the total number of hours currently available to you. This number is calculated by adding the Granted hours plus any hours carried over from the previous accrual cycle minus any used hours since the last reset date.

Reset Day: This date is when the accrual cycle resets or rolls over.

Note: You may not see all of these columns based on your company's settings.

Request Status: This section lists time off requests, approvals and denials. You can filter the view by selecting an option from the drop-down menu on the right hand side.

Requesting Time Off

1. Click **Request Time Off**

to submit your request. The Time Off Request screen displays.

Figure 30

2. Select the type of non-work time you are requesting from the drop-down menu. Your current balance for that non-work pay type appears to the right under "Current Balance."

3. Enter data for the "Choose When" section.

   a. Your "Start Balance" shows your projected accrual as of the first date you are requesting.

   b. Your "End Balance" shows the number of hours you have remaining on the last day of your request after those hours are taken.

4. Enter any notes in the **Notes** field you would like your manager to see before they review your request.

5. Click **Submit**. The Request Status area updates as seen below.

Figure 31

6. Hover over the piece of paper icon under Employee Notes to see your Note to your manager.

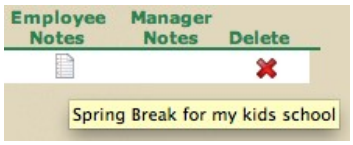

Figure 32

Deleting Requested Time Off

1. Click **Delete** for any request you wish to delete under the Request Status section on the Time Off Accruals screen.

   a. If there is more than one line item for a given entry, click the magnifying glass . The entry expands for a detailed view.

Figure 33

   b. A confirmation box displays asking if you are sure you want to delete this item.

Figure 34

2. Click **Yes**. The item is removed from the screen.

Checking for Approved Requests

1. The “Status” changes from “Requested” to “Approved” once a manager has reviewed and approved your Time Off Request.

Figure 35

Note: The “Status” changes to “Denied” if it has not been approved.

2. If there is a message from your manager, it displays under the “Manager Notes” column. Hover over the piece of paper icon to see the message.

Viewing the Calendar

The Time Off calendar shows any employees who have requested time off within a specified month. You may want to review this before requesting time off if your company has a policy about the number of individuals that can be off on any given day.

Note: The list of employees that display are managed by your system administrator.

1. Click **View Calendar**

to review time off requests. The following screen displays.

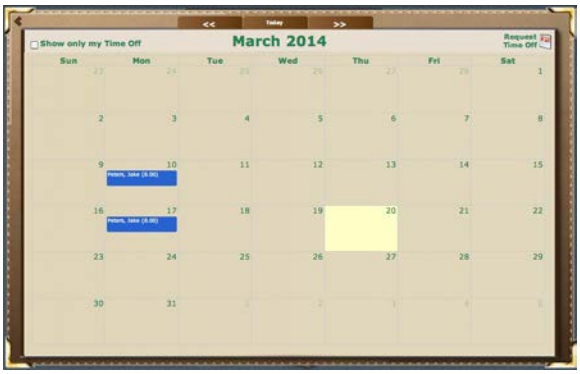

Figure 36

2. The current day is highlighted in yellow. To navigate to other months, use the arrows at the top.

3. To submit a time off request. Click **Request Time Off**

in the top right corner of the screen. For instructions, see the Requesting Time Off section.

4. To remove this screen from your view, click on any gray area of the Employee Dashboard.

Viewing the Chart

The Time Off Chart shows the history of your accruals.

1. Click **View Chart**

to review the history of your accruals. Below is an example of one of the charts that may display.

Figure 37

2. To change the scope of the chart, click one of the Zoom options in the top left corner of the screen.

Figure 38

Messages

The messaging system is a way for you to communicate with your manager(s) within this system. Messages can only be retrieved when someone logs into the system.

The mailbox icon displays as a closed mailbox if there are no messages.

Figure 39

The mailbox icon displays as an open mailbox if there are messages. The number of unread messages displays in a red circle.

Figure 40

Viewing Messages

1. Click **Messaging**. The Messages screen displays.

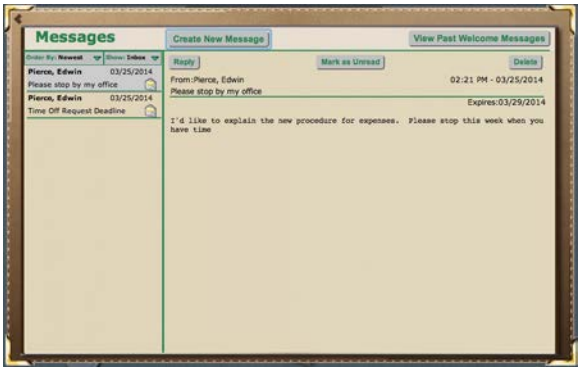

Figure 41

The new and saved messages display on the left-hand side of the screen. New messages display an icon with a sealed envelope.

Previously viewed messages display an icon with an opened envelope.

2. You may filter that messages should appear by the “Order By:” Newest, Oldest or By Sender and the “Show:” Inbox, Sent or All.

3. Click the message you want to view.

   - To delete this message, click **Delete**.
   - To reply to this message:

     a. Click **Reply**.

     b. Enter your message.

     c. Click **Send**.

   - To make this message display as a new unopened message, click **Mark as Unread**. The opened envelope changes into a sealed envelope.

4. To see previously viewed Welcome Messages, click **View Past Welcome Messages**.

Creating Messages

1. Click **Messaging**. The Messages screen displays.

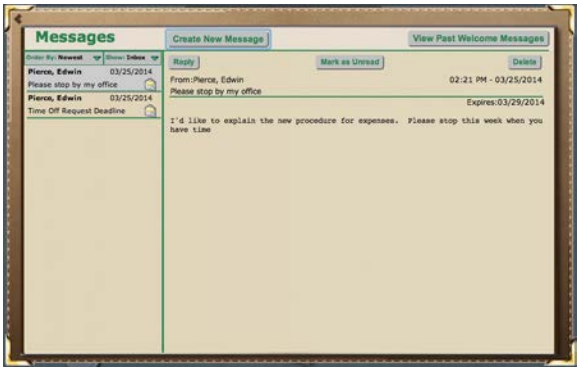

Figure 42

2. Click **Create New Message**. The New Message screen displays.

Figure 43

3. Select the manager(s) that should be sent this message.

   Note: The available managers are any manager(s) overseeing your employee group, “Manager” (that is all managers overseeing your employee group) and your system administrator.

4. Enter the Subject line for the message.

5. Enter the text for the message.

6. Click **Send**.

Welcome Messages

Welcome messages are messages that display automatically as soon as you login to the system. They are different than a standard message as they appear to be layered on top of all your Employee Dashboard icons as seen below.

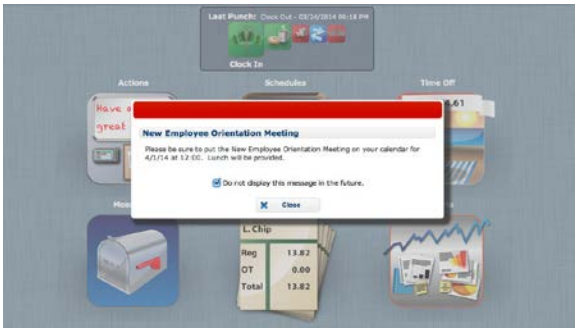

Figure 44

1. To continue to see this message each time you login, be sure the box next to the “Do not display this message in the future” option is unchecked. To avoid seeing this message each time you login, uncheck the box next to the “Do not display this message in the future” option.

2. Click **Close**.

3. To see previously viewed Welcome Messages:

   a. Click **Messages**.

   b. Click **View Past Welcome Messages**.

Time Card

The Time Card screen reviews your work and non-work time for a specified date range.

The Time Card icon displays your totals for time worked for a specified date range set up by your administrator.

Figure 45

Click **Time Card** to view the details of your time card in the Time Card screen. If a manager has already approved your time, it is noted by a green circle under the Approval title.

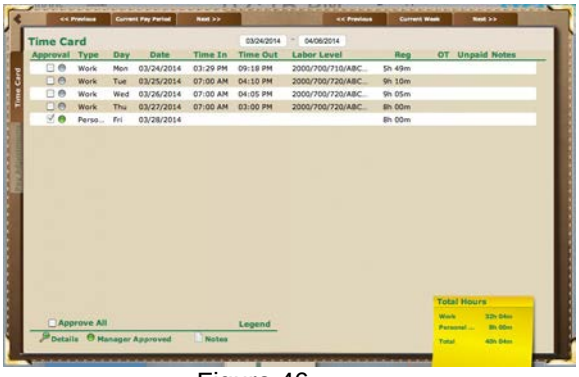

Figure 46

Approving Your Time Card

1. Review the hours and make sure they are accurate.

   Note: If there is a magnifying glass to the left of the transaction that means there is additional information such as lunch or transfers. Click the magnifying glass for a more detailed view of any day.

2. Approve each of your line items individually.

   a. Click the white box under the Approval title to the corresponding line item you wish to approve.

Figure 47

   b. Repeat Step “a” as needed.

   c. To unapprove a line item, click the checkmark next to the corresponding line.

      Note: If you are unable to approve your time card, check with your manager. It is possible that this feature has not been activated or the deadline for approvals has passed.

3. Approve the entire time card.

   a. Click the white box at the bottom of the screen next to Approve All.

Figure 48

   b. To unapprove a line item, click the checkmark next to the corresponding line.

      Note: If you are unable to approve your time card, check with your manager. It is possible that this feature has not been activated or the deadline for approvals has passed.

Reports

There are three reports available to employees: Schedules Report, Time Card, and Time Off Accruals. You can run these reports for any specified date range and view it as a PDF, an Excel or a TIFF/PNG file.

Note: The Reports icon may be gray if your company does not utilize this feature. Also, you may only have access to one or two of the reports mentioned above.

Click **Reports** to view your reporting options.

Figure 49

Running Reports

The available reports are listed on the left as seen in the Reports screen as shown below.

Figure 50

1. Click the name of the report you wish to run. The parameters screen displays as seen below.

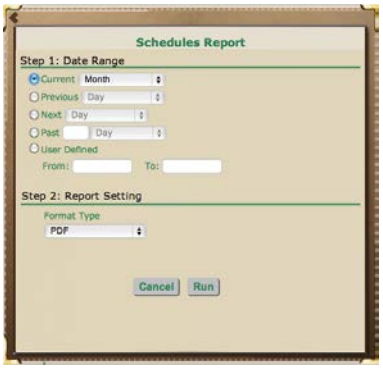

Figure 51

2. Enter in the desired date range.

3. Select the format type from the drop-down menu.

4. Click **Run**.

5. When the report is ready, it displays in the Reports screen on the right hand side under “Generated Reports” as seen below.

Figure 52

Viewing Reports

Previously run reports display under the “Generated Reports” section of the Reports screen in the order that they were run, beginning with the most recent and working backwards.

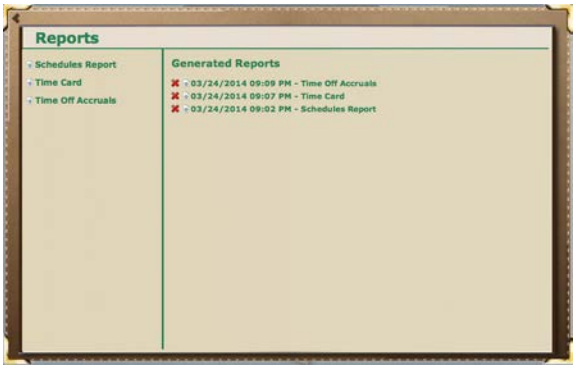

Figure 53

1. Click a report under the “Generated Reports” section. You can click the date, time or name of the report.

2. The corresponding report displays.

Note: To delete a report, click **Delete** next to the generated report you wish to delete.

Using the Mobile Web Feature

Browsing to the software from any mobile device results in the product opening in a mobile-friendly format.

Note: At login, you can request to view the Desktop version instead of the mobile-friendly view.

Once you are logged in, you can punch, review and approve time cards and review and submit time off requests.

Note: You may not have access to all of these features if they have not been enabled by your company.

Mobile Login

1. Open your browser and enter the address given to you by your company. The Mobile Login screen displays.

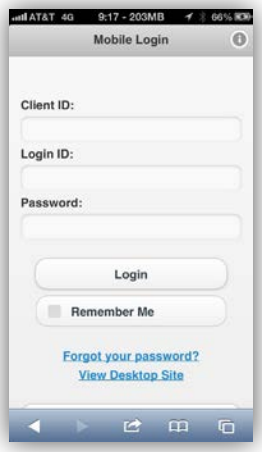

Figure 54

2. Enter your Client ID, Login ID and Password.

3. Click **Login** when you are finished.

   Note: You may check the box “Remember Me” to save your Client ID and Login ID for future logins.

4. The Home Page displays.

Figure 55

Mobile Punch

1. Click the down arrow to select the type of punch you are entering.

   Note: You also see the last punch entered.

Figure 56

2. Enter your labor levels when prompted.

   Note: You may not see this prompt if your company does not require labor levels.

3. A confirmation box: “Punch was saved” displays.

Mobile Time Card

1. Click **Time Card** on the Home Page.

Figure 57

2. The Time Card Details screen displays.

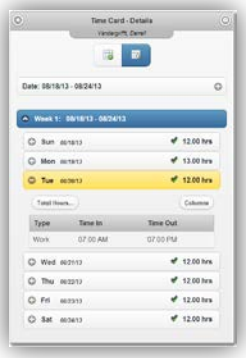

Figure 58

3. By scrolling down, you can open the Labor Level Hours Summary or the Total Hours Summary.

Mobile Time Card Approval

1. Click **Time Card** on the Home page.

Figure 59

2. The Time Card Details screen displays.

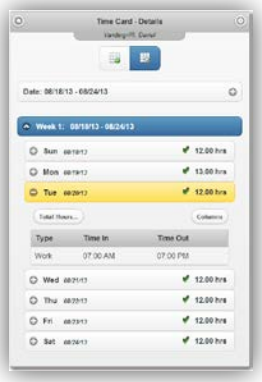

Figure 60

3. Click **Time Card Summary** to view the screen as a summary.

Figure 61

4. Click **Approve Time Card**. A pop-up screen asks "Approve the selected Date Range?"

5. Click **Approve**.

Mobile Time Off Requests

1. Click **Time Off** on the Home page.

Figure 62

2. The Time Off Summary screen displays.

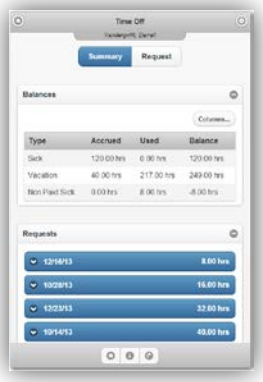

Figure 63

3. Click **Request**. The Time Off Request screen displays.

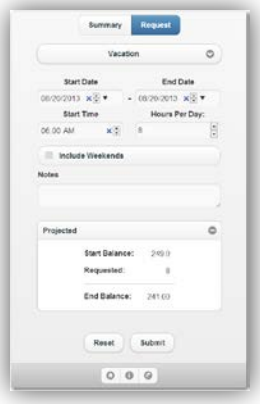

Figure 64

4. Enter the appropriate fields.

5. Click **Submit**.

   Note: Clicking Reset erases all your entries and goes back to the defaults.

6. A "Your Request was successfully submitted" confirmation box displays.

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