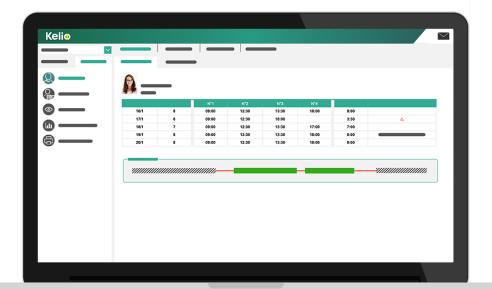


Time & attendance management for

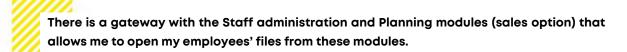




#### 1 WHAT IS IT USED FOR?

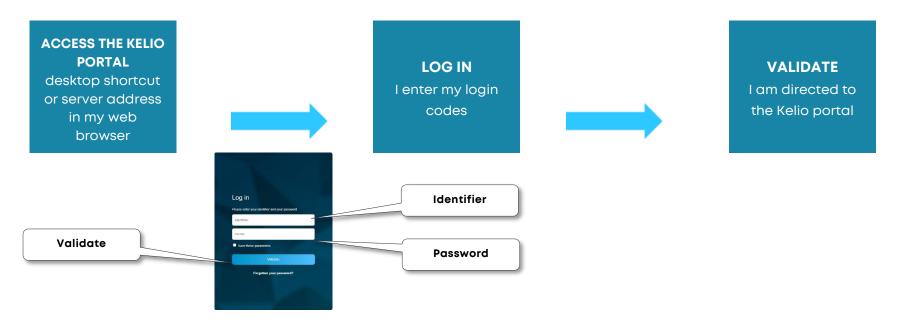
The Time & Activities module contains the employee table. Here I can:

- create or configure their profiles (personal data, time management)
- perform actions on clockings, schedules or working times
- assign leave days, remote working days (optional) or indicate absences

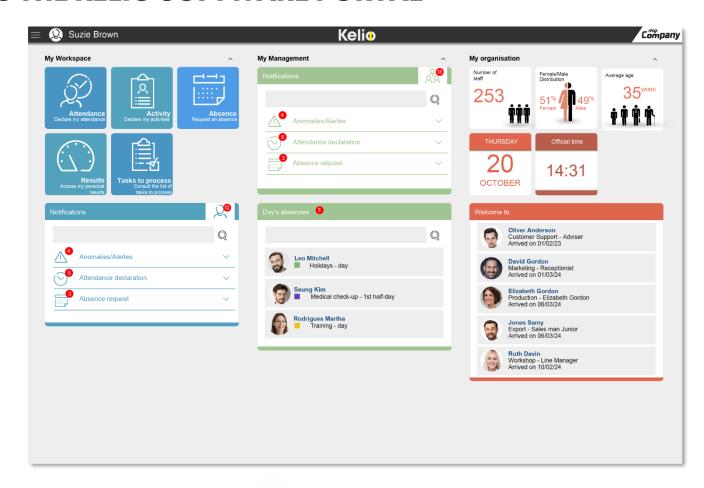


#### 2 LOG IN

Access to the portal is controlled by the user's login and password. All modules and suggested features depend on individual user rights.

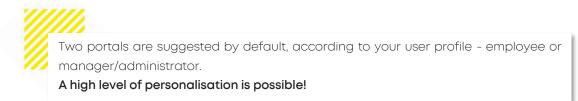


## **3 ACCESS THE KELIO SOFTWARE PORTAL**



This portal provides you with access to the different software modules.

- available on all devices
- fully customisable
- with real-time indicators
- and a to-do list



#### **4 ACCESS THE EMPLOYEE FILES**

I select the Time & Activities module by clicking on the tile or going through the navigation menu Administrator workspace > Time & Activities .



- The list of employees opens (in most cases, it is already set up for my account)
- I can refine the filter by selecting:



#### **5 CREATE A NEW EMPLOYEE**

An employee can be created from any screen in the Administrate section.

- I can create a new employee file by clicking 🖳 Then:
  - I either start with an empty file,
  - or I duplicate an existing file.
- I enter the **time management** data:
  the registration date, the last name and first name, the section, the public holiday and payroll calendar, a weekly reference schedule, etc.
- I enter the user rights:
  - if he/she clocks, I activate the clocking rights in the Terminal rights and select the employee profile
  - if the system is used to manage leave and absences and/or attendance indications, I limit the access to the Employee/Mobile Self-Service. I add the name of the absence validators and, if applicable, the remote working and attendance declaration validators.

To save time, I assign the Time contract that best matches his/her time management data!

I save even more time with the various dates that need adjusting by using the **Date wizard** option!

#### 6 EMPLOYEE FILE (CONFIGURE)

**Summary**: Here I can consult and change the main information about the employee (such as email address for receiving notifications regarding requests, work cycle, etc.).

Personal data: information about identity, family, means of transport, health

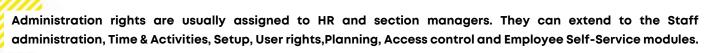
Professional data: general information about the employee and his job (line managers, PPE, medical appointments, etc.)

**Career:** for the *Employment contract*, I enter the type and nature of the contract (open-ended, temporary, etc.), in the other sections, data relating to qualifications and appraisals

**Application data:** work cycle and remote working cycle, for the *Time contract*, in addition to any previously saved elements, I add the accounts needed to calculate his/her working time and I assign a control profile (determines the anomalies that may be detected by the system): I assign the employees to the public holiday calendar of their region

**User rights**: rights assignment

- User: login and password, language
- Portal rights: selection of the customised portal (manager or employee)
- Terminal rights: (see above)
- Rights on Employee Self-Service/Mobile Self-Service: as an employee or manager. Validator rights,
  if the person must be asked to validate absences and/or attendances. If applicable, indicate the
  higher level validators (who will intervene to confirm or cancel the actions of the agent or the person
  who will replace the employee in his absence).
- HR rights: administration rights on Staff administration, Time & Activities, Setup and Planning

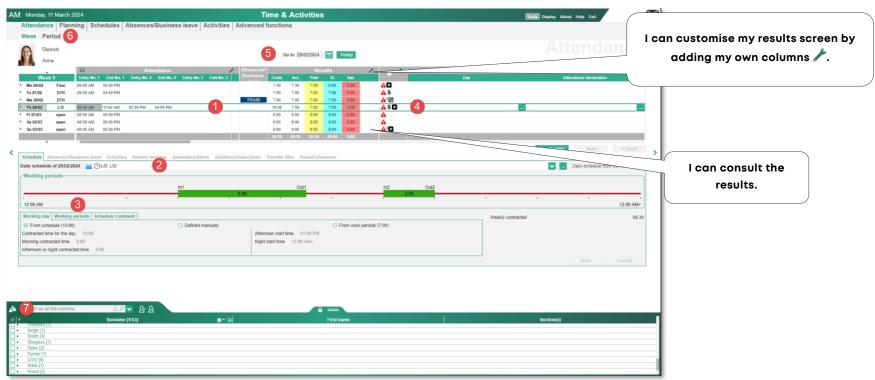


- Access rights: rights on access management
- Rights on collaborative tools: rights on the suggestions box and survey applications

## 7 ATTENDANCES (MANAGE)

I want to view my employees' clockings and their attendance indications, check the totals and acknowledge anomalies.

- I can modify the clockings or add clockings directly on the relevant line  $oldsymbol{0}$
- By moving the cursor onto a date, I change the schedule applied to the day 2 or modify the terminals of the working period 3 (to take into account the hours performed beyond the fixed schedules)
- $\stackrel{\textstyle extstyle extstyle$



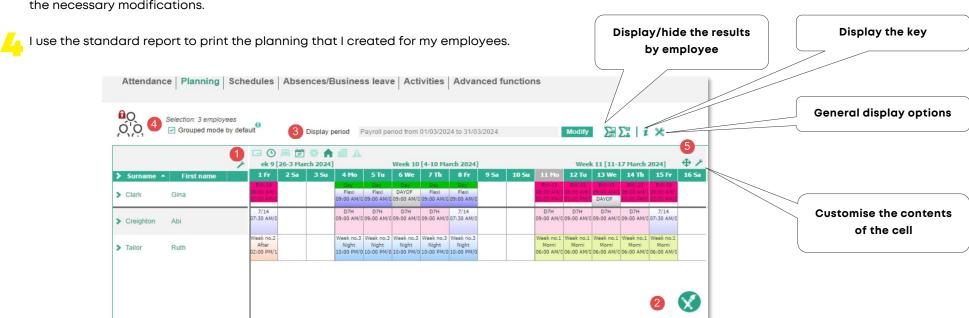
**Display:** To filter my search dates, I use the calendar 6. I switch to Period view to see an entire month 6.

To display the attendances of several people, I check them in the list at the bottom of the screen 0 and I validate my choice by clicking 📤.

#### 8 PLANNING (MANAGE)

I perform the basic actions for a planner, which include planning of schedules, absences, activities, remote working and comment input.

- I open the planning individually or collectively with a view by the day.
- 1 activate the elements that I want to see by clicking on the icons 1. To adjust the display to suit my requirements, see below.
- I assign elements to the employees using the palette 2. A double-click on a cell opens the daily detail. I can navigate between the different tabs and make the necessary modifications.



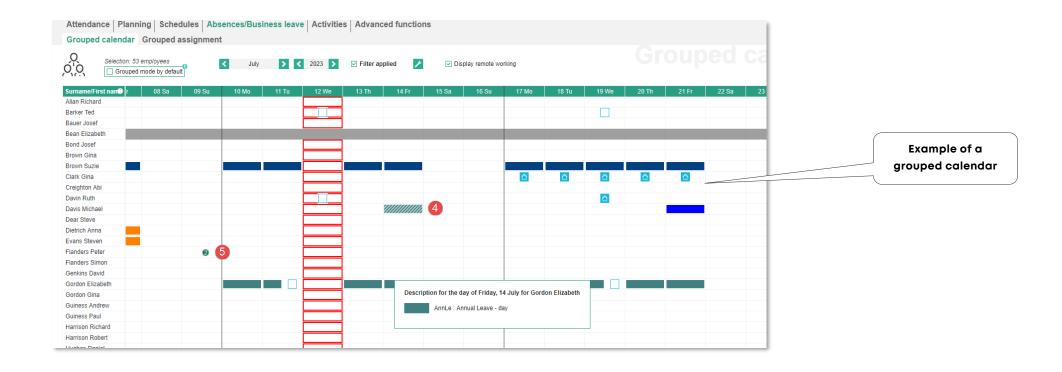
**Display:** To filter dates, I use the calendar 3. To display the planning for several people, I check them in the list at the bottom of the screen and I validate my choice by clicking 4. If I check **Grouped mode by default** 4, the planning is automatically displayed for the entire selected population. I use the icon 4 to change the size of the cells 5.

## 9 ABSENCES (MANAGE)

I want to access the calendar listing the absences and leave, enter an absence, a business leave, a training, etc.

- I select the absence in the palette and move it onto the calendar or I double-click on the first day of the absence. I view the balances for the current accounting year in the palette.
- Once the absence file is open, I select date 1 and type 2. In the options, I can indicate the periods or the duration. If the absence is recurring, I enter the frequency and duration 3.
- $\stackrel{ extstyle e$

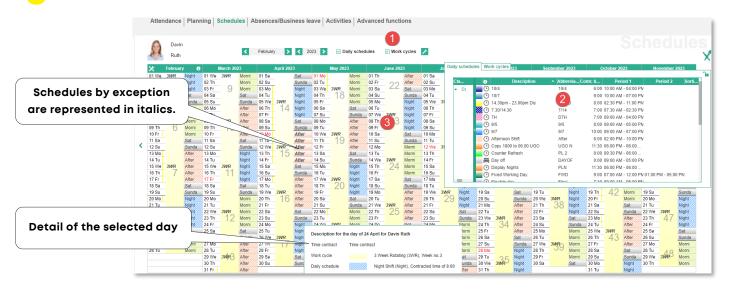




## **10SCHEDULES BY EXCEPTION (MANAGE)**

I want to occasionally assign a different schedule to my employee.

- I select the schedules displayed on the planning  $oldsymbol{0}$  .
- I select the daily schedule or work cycle in the palette 2 and I move it onto the calendar 3.
- I modify the contracted time and the working periods if necessary.



If I make a mistake, I can click on **Return to...** to go back to the default schedule/cycle.

# 11 ACTIVITIES (MANAGE)

The assignment of activities is very similar to the assignment of absences and schedules by exception.

- I select the schedules displayed on the planning.
- 1 select the activity and/or cost centre in the palette and I move it onto the calendar.
- I add the necessary adjustments in file mode.

# 12 ADD/DEDUCT TO CREDIT/DEBIT AN ACCOUNT (MANAGE)

All accounts (particularly TOIL, leave) can be credited or debited occasionally or repeatedly.

I click on  $^{\odot}$  to add an action from the navigation menu **Advanced functions > Additions/Deductions**.

I select the date and the transaction.

I select the account to be credited and the value to be assigned and, if applicable, the interval.

It is recommended to leave a **comment** justifying these actions. A mass assignment can be made by selecting the relevant population (see filter).

#### 13 BALANCE INITIALISATION (MANAGE)

For updating balances (leave, balance)

- I click on <sup>©</sup> to add an action from the navigation menu **Advanced functions > Account initialisations**.
- I select the date and the balance.
- I credit the required value.

Outside of annual initialisations, this is used to set up **leave allowances** for non-permanent workers and initialise their **balance** at the contract start.

## 14 ANOMALIES (SUPERVISE)

Anomalies are generated by standard or specific control programs. Their processing is further enhanced by a wide range of features:

- anomaly detection and processing in real time
- customisable search criteria and filters
- individual or collective mode management
- multi-function correction screen adapted to the anomaly processed
- individual or grouped anomaly acknowledgement
- SMS or email alert to the employee and line manager to request information about the anomaly being processed
- logging of the anomalies processed possible
- o anomaly monitoring sent by email in real time or as a daily report

# 15 RESULTS (ANALYSE)

I obtain information relating to attendance time, totals and balance accounts.

## 16 REPORTS (PRINT/EXPORT)

I can output the collected data in PDF format or on an Excel® spreadsheet. My favourite reports like the end of period report can be automatically generated and sent by email to the employees. I can even send them for electronic signature (commercial option). There are a number of specific standard reports for absences, results or absentees/attendees or annual leave tracking.

