
Paylocity – Web Time (Employees)

Training Guide –
Timesheets and Time Off



2017

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SECTION 1: LOG INTO PAYLOCITY

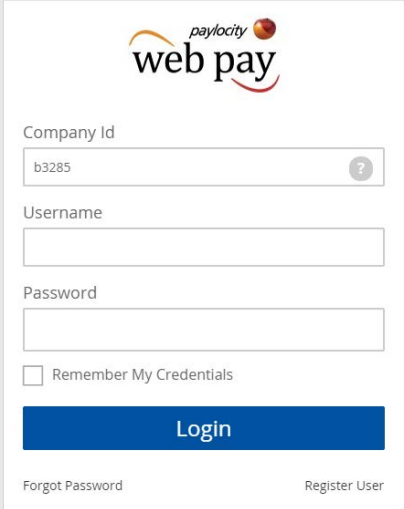
1. Paylocity Website

<https://login.paylocity.com/>

2. Company Id: **B3285**

username: (generally) first initial and last name
password: created by you

*If you need help with obtaining your username and/or password, please contact **Stacey Baker** – sbaker@edsisolutions.com or **Larisa Rabina** – lrabina@edsisolutions.com*

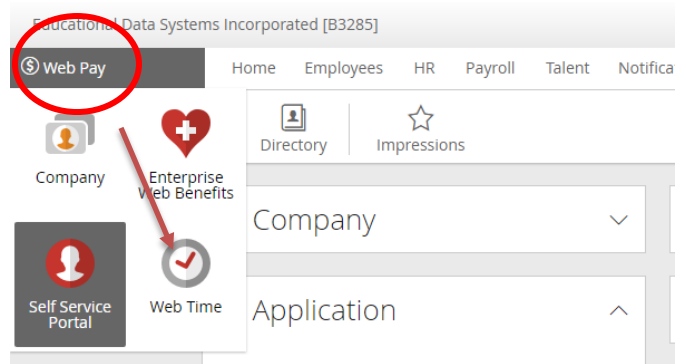


The screenshot shows the Paylocity 'web pay' login interface. At the top is the Paylocity logo. Below it are three input fields: 'Company Id' (containing 'b3285'), 'Username', and 'Password'. There is a 'Remember My Credentials' checkbox. A blue 'Login' button is positioned below the fields. At the bottom, there are links for 'Forgot Password' and 'Register User'.

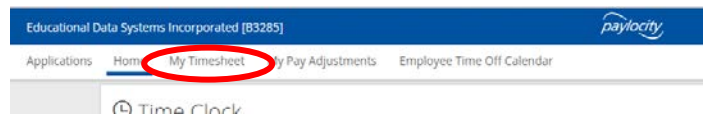
SECTION 2: ACCESSING AND COMPLETING YOUR TIMESHEET

From the Self-Service Portal

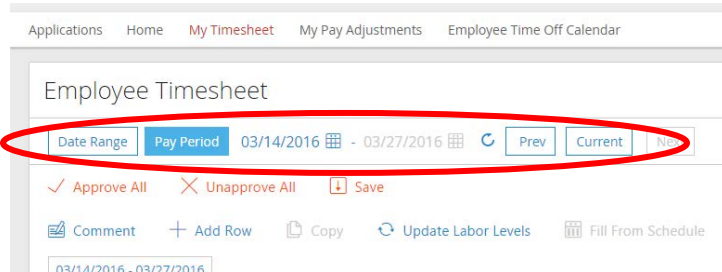
1. Select Web Pay and Web Time from the top menu bar



2. Select My Timesheet from the top menu



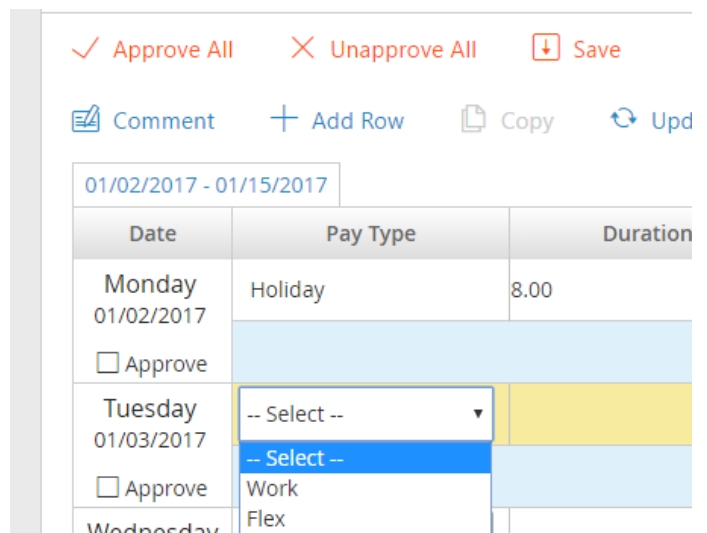
3. **Date Range** – you can view your timesheet by pay period or you can select a date range by selecting the dates on the calendar



4. **DATE** – review the date you are entering time for

PAY TYPE – provides a description of the hours allocated on your timesheet. Select a pay type from the drop down. Pay types include:


- **Work**
- **Flex**



5. **DURATION** – enter the number of hours you worked for that day

Note: For the Flex day, enter in 0 (zero) hours.

The screenshot shows the 'Employee Timesheet' interface. At the top, there are tabs for 'Date Range' and 'Pay Period', with the date range '03/14/2016 - 03/27/2016' selected. Below the tabs are buttons for 'Approve All', 'Unapprove All', and 'Save'. There are also buttons for 'Comment', 'Add Row', 'Copy', and 'Update Labor Levels'. The main table has columns for 'Date', 'Pay Type', 'Duration', and 'Labor Level'. The first row is for 'Monday 03/14/2016' with 'Pay Type' set to 'Work' and 'Duration' set to '0.00'. There is an 'Approve' checkbox below the first row.

6. **LABOR LEVEL** – refers to the project code. It is very important that you choose the correct project code. Use the magnifying glass  to select the project code

Select **Project** and then the correct project code. There are two ways to look up the project code – by name or number.

Note: If the project codes are not available in the timesheet, please contact Leah (Imondon@edsolutions.com) or Larisa (lrabina@edsolutions.com)

Once you choose the correct project, select **Update**

Note: If you are working on multiple projects, you can have multiple rows per day for the different project numbers

To add rows, select **Add Row** from the menu bar above the timesheet

To delete a row, select the row and choose at the end of the row



The screenshot shows the 'Labor Level Selections' dialog box. It has fields for 'Company' (Educational Data Systems), 'Project' (110204 [110204]), 'Department' (000000 [000000]), and 'Flex Time' (-Select-). There are buttons for 'Update', 'Clear', and 'Cancel'. Below the dialog box, there is a table with columns for 'Code' and 'Description'. The table lists several project codes and their descriptions, including 'EDS Office', 'Program Enhancement', 'Sales/Proposals', and 'Minimize'.

The screenshot shows the 'Employee Timesheet' interface. At the top, there are tabs for 'Date Range' and 'Pay Period', with the date range '03/14/2016 - 03/27/2016' selected. Below the tabs are buttons for 'Approve All', 'Unapprove All', and 'Save'. There are also buttons for 'Comment', 'Add Row', 'Copy', and 'Update Labor Levels'. The main table has columns for 'Date', 'Pay Type', 'Duration', and 'Labor Level'. The first row is for 'Monday 03/14/2016' with 'Pay Type' set to 'Work' and 'Duration' set to '0.00'. There is an 'Approve' checkbox below the first row.

7. **APPROVE** – Once you complete your timesheet, you must approve it. There are two ways to approve your timesheet.

- a. You can select the checkmark above Approve for each day
- b. Once you have completed the timesheet, you can select **Approve All**

The screenshot shows the 'Employee Timesheet' interface. At the top, there are navigation links: 'Applications', 'Home', 'My Timesheet' (highlighted), 'My Pay Adjustments', and 'Employee Time Off Calendar'. Below this is the 'Employee Timesheet' title. A date range selector shows '03/14/2016' to '03/27/2016'. Below the date range, there are three buttons: 'Approve All' (with a checkmark icon), 'Unapprove All' (with an X icon), and 'Save' (with a download icon). These three buttons are circled in red. Below these buttons are several action links: 'Comment', 'Add Row', 'Copy', 'Update Labor Levels', and 'Fill From Schedule'. At the bottom, there is a table with columns: 'Date', 'Pay Type', 'Duration', and 'Labor Level'. The first row shows 'Monday', 'Work', '0.00', and '110204/---/---'.

Once you approve your time, select **Save**

Note: If you already approved your time and you need to make changes, complete the following steps:

- Remove check mark from Approve checkbox
- Select **Save**
- Make your changes to the timesheet
- Select **Save**
- Checkmark **Approve**
- Select **Save**

Note: After completing the timesheets, check that the total hours on the timesheet are correct.

Totals for 03/14/2016 - 03/27/2016

All	Regular	OT1	OT2	Lunch	Break	Unpaid
4.00 hrs	4.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs

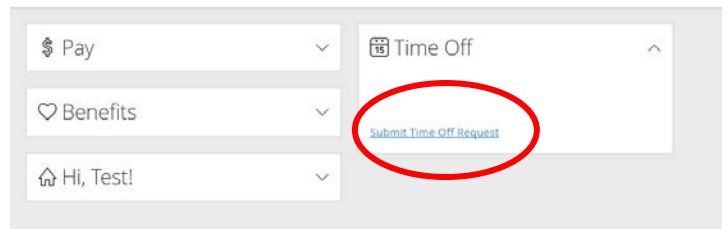
Totals by Pay Type

Pay Type	Hours
PTOY	4.00 hrs

SECTION 3: REQUESTING TIME OFF

From the Self-Service Portal

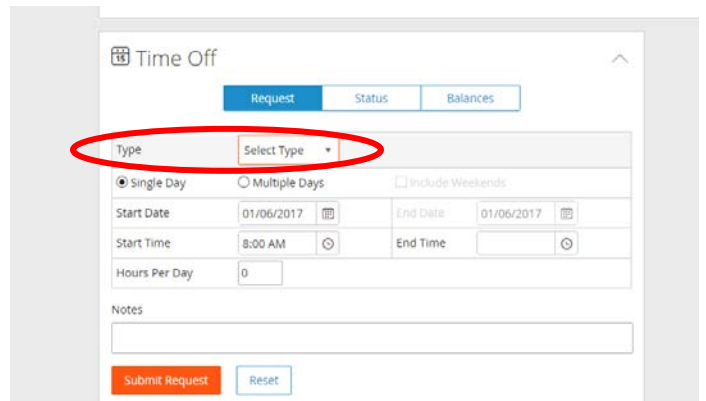
1. Select Submit Time Off Request from the Time Off section in the Self-Service Portal



2. Select Type from the Time Off Portal

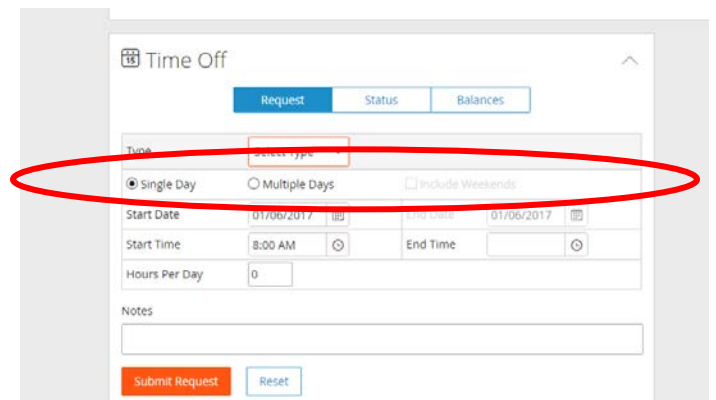
Time Off Type Options:

- Jury Duty
- FMLA
- Bereavement
- Personal Leave
- Customer Service Day
- Floating Holiday
- Military Leave
- Short-Term Disability
- Long Term Leave
- Worker's Compensation
- Medical Leave
- PTOY



3. Select **Single Day or Multiple Days** –

Note: For Multiple Days – the number of hours per day have to be the same



4. **Start Date** – the date(s) you are requesting off

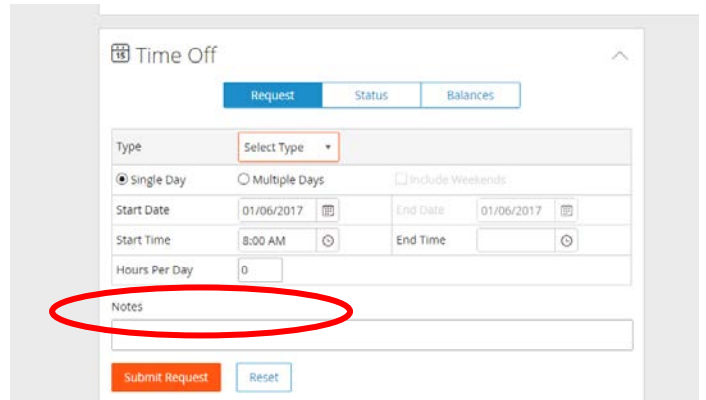
The screenshot shows the 'Time Off' request form. At the top, there are three tabs: 'Request' (active), 'Status', and 'Balances'. Below the tabs, there is a 'Type' section with a 'Select Type' dropdown menu. Underneath, there are two radio buttons: 'Single Day' (selected) and 'Multiple Days'. To the right of these is a checkbox labeled 'Include Weekends'. The 'Start Date' field is set to '01/06/2017' and the 'End Date' field is also set to '01/06/2017'. These two date fields are circled in red. Below the dates, there are fields for 'Start Time' (set to '8:00 AM') and 'End Time' (empty). At the bottom of this section is the 'Hours Per Day' field, which is set to '0'. Below the time fields is a 'Notes' text area. At the very bottom, there are two buttons: 'Submit Request' (orange) and 'Reset' (blue).

5. **Hours Per Day** – only enter in hours per day

Note: do not enter Start time and End time

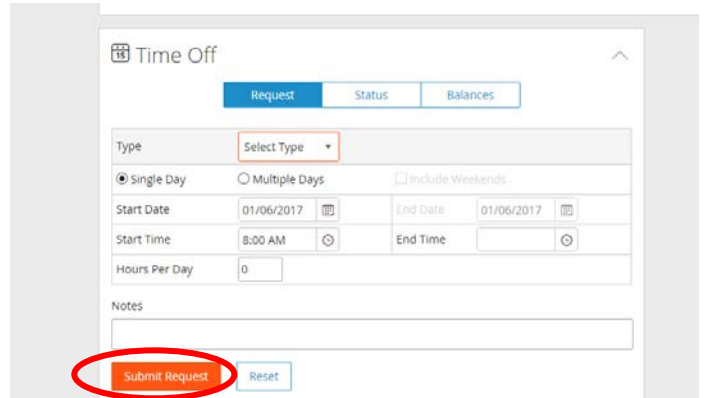
This screenshot shows the same 'Time Off' request form as the previous one. In this view, the 'Start Time' field is set to '8:00 AM' and the 'End Time' field is empty. The 'Hours Per Day' field, which is set to '0', is circled in red. All other fields and the overall layout are identical to the previous screenshot.

6. **Notes** (optional) – you can enter a note to leave for your Supervisor/Manager



The screenshot shows the 'Time Off' request form. At the top, there are three tabs: 'Request' (active), 'Status', and 'Balances'. Below the tabs, the 'Type' section has a 'Select Type' dropdown menu. Underneath, there are radio buttons for 'Single Day' (selected) and 'Multiple Days', along with an 'Include Weekends' checkbox. The form includes fields for 'Start Date' (01/06/2017), 'End Date' (01/06/2017), 'Start Time' (8:00 AM), and 'End Time'. There is also a 'Hours Per Day' field set to 0. The 'Notes' field is a text area, and it is circled in red. At the bottom, there are two buttons: 'Submit Request' (orange) and 'Reset' (blue).

7. Select **Submit Request**



This screenshot is identical to the one above, showing the 'Time Off' request form. However, in this image, the 'Submit Request' button at the bottom is circled in red, indicating the next step in the process.

8. **Status** - Provides an overview of all your Time off Requests

Time Off

Request Status Balances

12/19/2016 - 01/15/2017 Select Type Select Status Go

Date ▼	Type	TotalHours	Status	Delete
12/29/2016 - 12/29/2016	PTOY	4 hrs	Pending	×
12/19/2016 - 12/21/2016	PTOY	24 hrs	Approved	

9. **Balances**

- **Last Balance** – balance since the last pay period
- **Used Since** – time used in the current pay period
- **Available** – currently available
- **Future Approved** – time requested in the future
- **Last Balance – Used Since** = Available
- Always check the actual balance before requesting time off. Available balance **does not** include Future Approved. Your actual balance is Available - Future Approved

Time Off

Request Status Balances

Type	Last Balance	Used Since	Available	Future Approved
Customer Service Day	18 hrs	0 hrs	18 hrs	0 hrs
Floating Holiday	0 hrs	0 hrs	0 hrs	0 hrs
Bereavement	0 hrs	0 hrs	0 hrs	0 hrs
PTOY	50 hrs	0 hrs	50 hrs	0 hrs
Jury Duty	0 hrs	0 hrs	0 hrs	0 hrs
Personal Leave	0 hrs	0 hrs	0 hrs	0 hrs