
North Lanarkshire Council



Managers Guidance - Time & Attendance

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Workforce Systems Development Lead	Mark Lennon	June 2020	0.1
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Document Owner(s):

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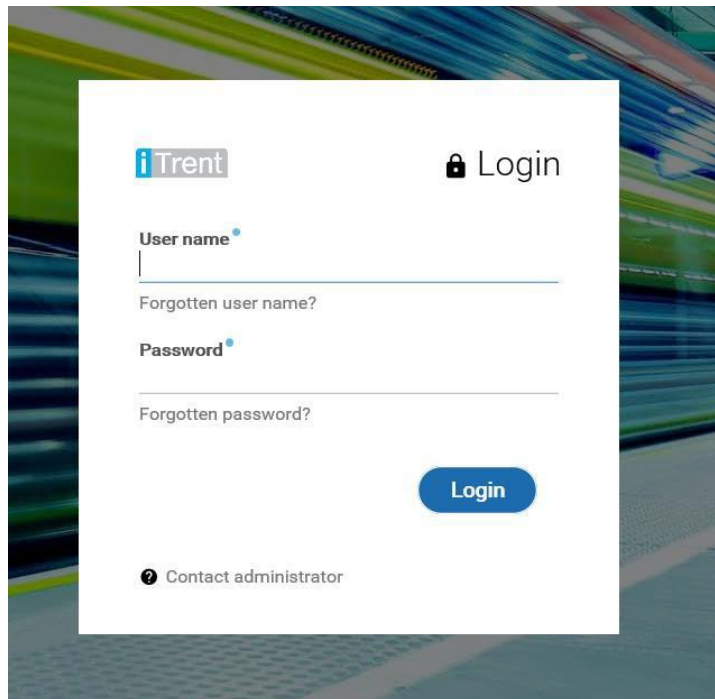
Overview

This guide will explain to you how to view and manage your employee's flexi recording and booking using myTeam.

We hope that you find this guide useful. If you have any issues or difficulties when trying to retrieve information regarding your employee's flexi, please contact the Employee Service Centre People Help Desk Team who will be able to support you. They can be contacted by Telephone: 01698 403151 or email ESC-HelpDeskTeam@northlan.gov.uk.

1. Logging in

Go to https://ce0076li.webitrent.com/ce0076li_web/wrd/run/etadm001gf.open and log in.



Your employee number is your username. *If you are having difficulty logging into your myTeam account, please click 'Contact administrator' for further guidance.*

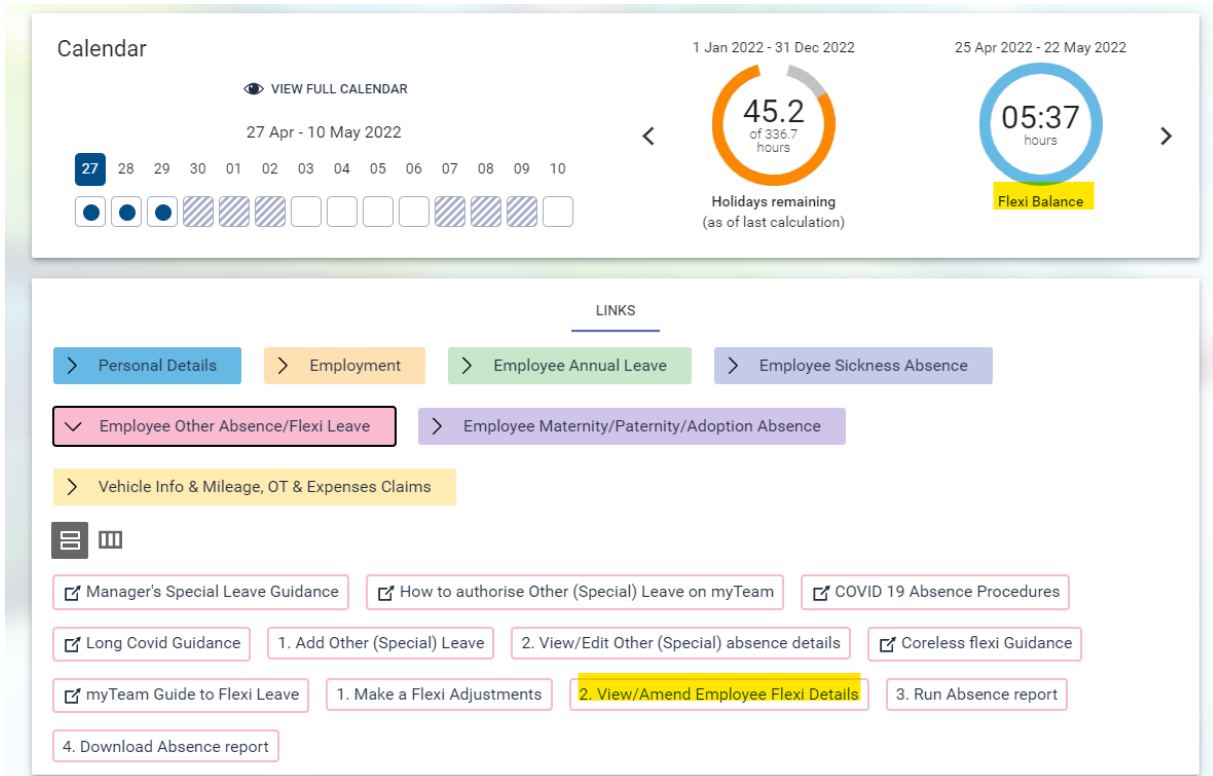
Once you have logged in, select the 'People' and select the employees record you wish to view at the left-hand side:



2. Flexi Recording

2.1 Viewing an Employees Flexi Details

It is an employee's responsibility to record their flexi details each day they are working. To view their recorded times, please select the absence tab:



The screenshot displays the 'Calendar' section for the period 27 Apr - 10 May 2022. It includes a 'VIEW FULL CALENDAR' button and a grid of dates. To the right, there are two circular gauges: one for 'Holidays remaining (as of last calculation)' showing 45.2 of 336.7 hours, and another for 'Flexi Balance' showing 05:37 hours. Below the calendar is a 'LINKS' section with various navigation buttons and links. The link '2. View/Amend Employee Flexi Details' is highlighted in yellow.

Within the above screen you can also see an overview of the employees flexi balance within that current flexi period.

Flexi – An employee will use the Flexi function when recording their hours worked. If an employee has accrued enough time for a half or full day flexi leave, they will book their flexi leave using the drop down and selecting 'Booked'. This request will be sent to the manager for action.

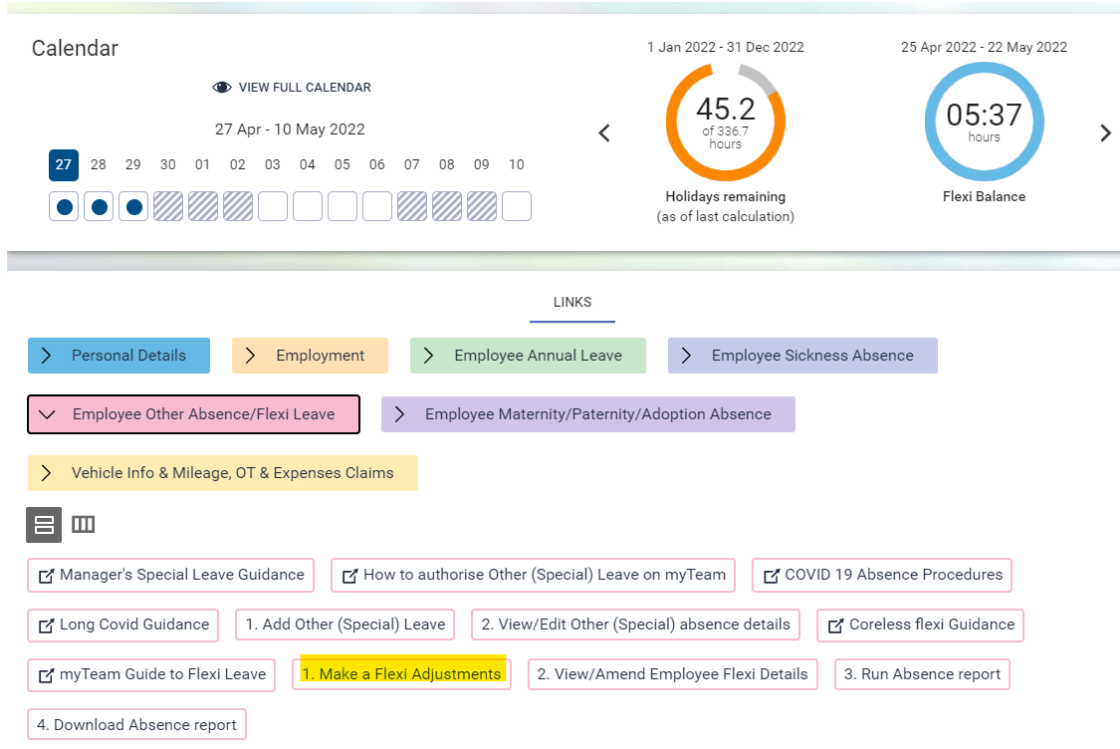
Please note

- *Flexi leave (half/full day leave) is only entitled to staff who do not work a smarter working pattern.*
- *An employee can only carry over a maximum of 7 hours into the next flexi period (pro rata'd for part time employees).*
- *30 minutes will be deducted from an employee time worked if they do not clock out for a lunch break and have worked more than 6 hours that day.*

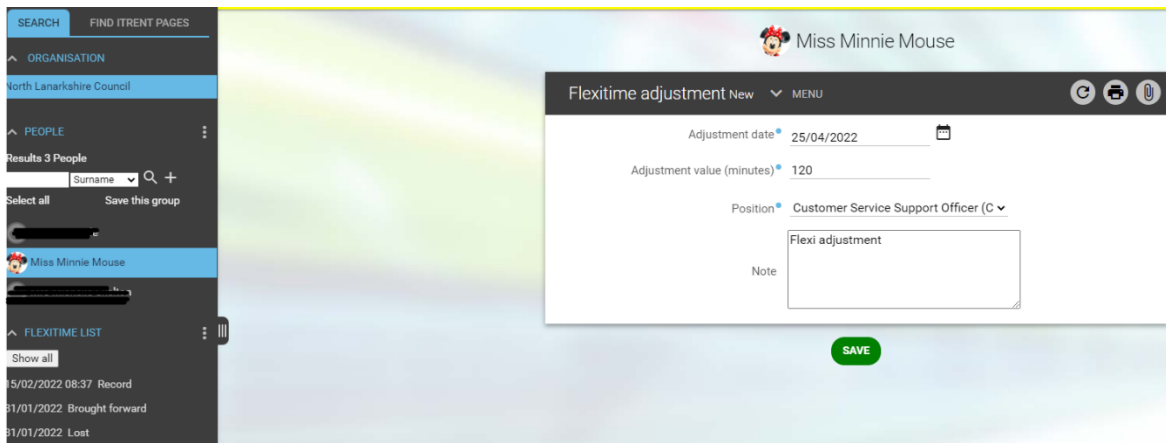
3. Flexi Adjustments

3.1 Creating a flexi adjustment for a reportee

To create a flexi adjustment to an employee's flexi record, please select the absence tab
>Make a Flexi Adjustment:



The screenshot shows the 'Calendar' section with a date range of 27 Apr - 10 May 2022. To the right, there are two circular gauges: 'Holidays remaining (as of last calculation)' at 45.2 of 336.7 hours, and 'Flexi Balance' at 05:37 hours. Below these is a 'LINKS' section with several navigation buttons: 'Personal Details', 'Employment', 'Employee Annual Leave', 'Employee Sickness Absence', 'Employee Other Absence/Flexi Leave', and 'Employee Maternity/Paternity/Adoption Absence'. There is also a button for 'Vehicle Info & Mileage, OT & Expenses Claims'. Below the links are several informational links, including 'Manager's Special Leave Guidance', 'How to authorise Other (Special) Leave on myTeam', 'COVID 19 Absence Procedures', 'Long Covid Guidance', '1. Add Other (Special) Leave', '2. View/Edit Other (Special) absence details', 'Coreless flexi Guidance', 'myTeam Guide to Flexi Leave', '1. Make a Flexi Adjustments', '2. View/Amend Employee Flexi Details', '3. Run Absence report', and '4. Download Absence report'.



The screenshot shows the 'Flexitime adjustment' form for Miss Minnie Mouse. The form includes the following fields: 'Adjustment date' (25/04/2022), 'Adjustment value (minutes)' (120), 'Position' (Customer Service Support Officer (C)), 'Flexi adjustment' (a text area), and 'Note' (a text area). A green 'SAVE' button is located at the bottom right of the form. The background shows a sidebar with 'ORGANISATION' (North Lanarkshire Council), 'PEOPLE' (Results 3 People, including Miss Minnie Mouse), and 'FLEXITIME LIST' (15/02/2022 08:37 Record, 31/01/2022 Brought forward, 31/01/2022 Lost).

A manager will only have the access to create an adjustment to their reportees record. You also have the option to create a note as to why the adjustment has been made.

An adjustment should be entered as a total number of minutes, for example for an adjustment of 2 hours you should enter 120 minutes.

An adjustment can be made to either credit or deduct time (minus input before the value as shown in description) if necessary.

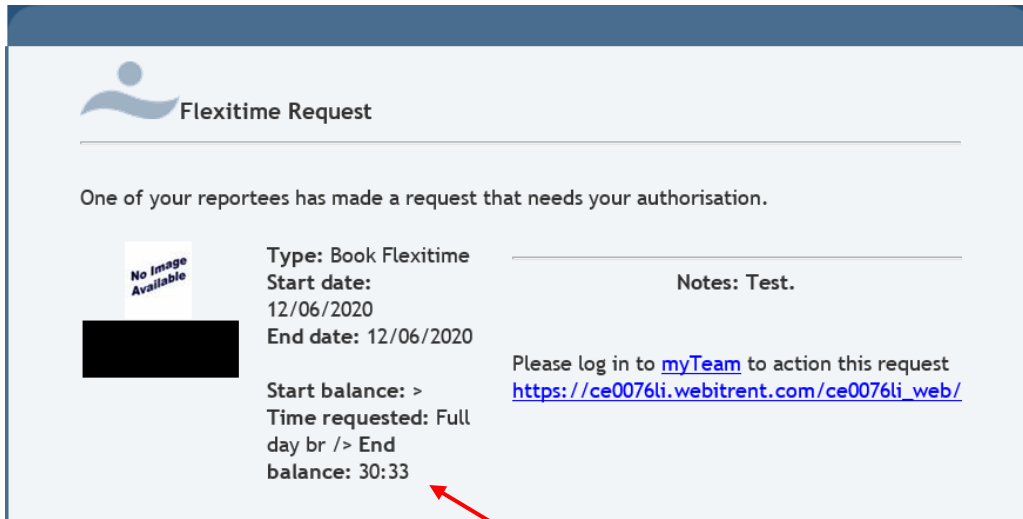
This is also where you will create the one time flexi adjustment of the transfer of the balance from the Etarmis system.

4. Email Alerts

You will receive the following email alerts to notify you when:

- An employee has requested to use their accrued flexi time. This could be a full day flexi or half day flexi leave.
- An employee has not recorded their workings hours for a day. This will be sent at the end of the week.

An example of a flexi request alert:



Flexitime Request

One of your reportees has made a request that needs your authorisation.

Type: Book Flexitime
Start date: 12/06/2020
End date: 12/06/2020


Notes: Test.

Please log in to [myTeam](https://ce0076li.webitrent.com/ce0076li_web/) to action this request
https://ce0076li.webitrent.com/ce0076li_web/

Start balance: >
Time requested: Full day br /> End
balance: 30:33

You will be able to see at a glance an employee's current balance.

To action the alert, please follow the link within the email which will take you direct to your myTeam account. When logged in, you will find the request within your to do list:



Dashboard overview for user Amy, showing navigation links for People, Leavers, My task redirection, COVID-19 information, My dashboard, and Organisation chart. The bottom navigation bar includes: My to do list (2) / Processes (0), Out of office today (Mrs [redacted] Ms [redacted]), 2022 - 2023 Payroll Schedules & Service Deadlines, and Future Workplace - Employee Guidance.

ACTIONS

Once you have selected the request within your to do list > select (at the top of the

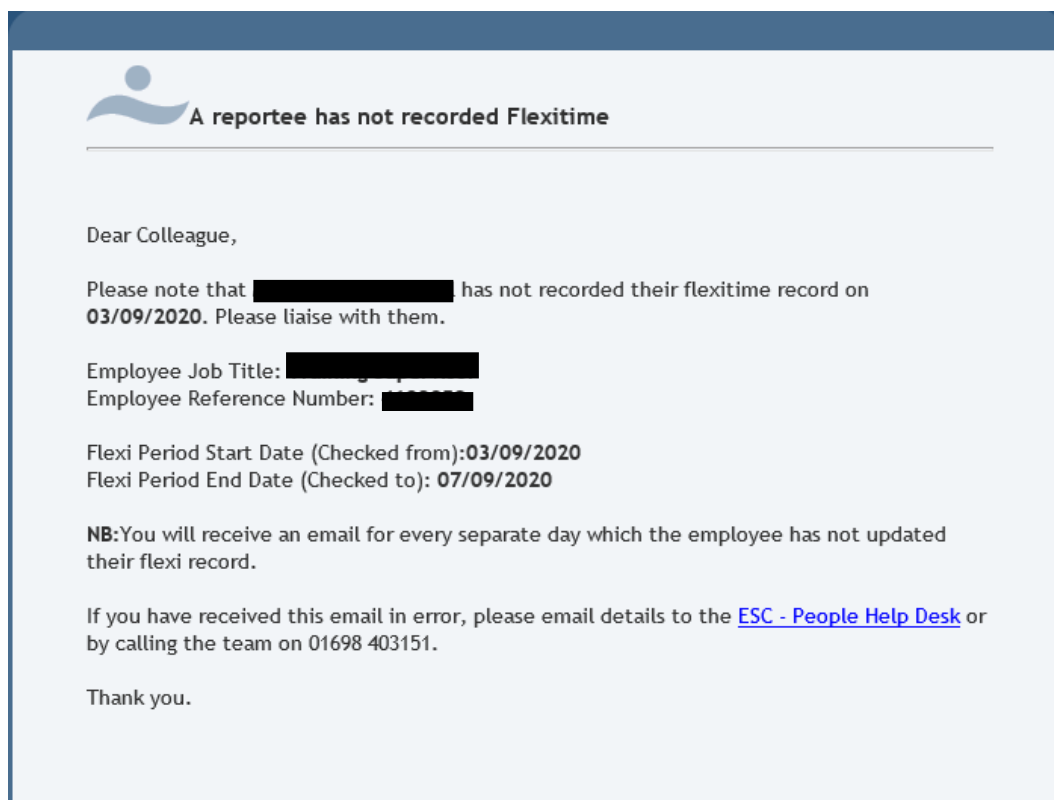
list) > Authorised
 Not authorised you will then be given the option to authorise or reject the request.

The employee will be notified via email of the outcome.

Employees who have not clocked in/out

Email alerts are also system generated to run on a Friday evening each week, advising the reporting manager of what dates were missed. The system will generate a separate email for each date an employee has not recorded flexi (and who were not on authorised leave).

An example of a missing flexi record alert:



You will receive a separate email for each employee that falls into this category (i.e. have not recorded their working times).

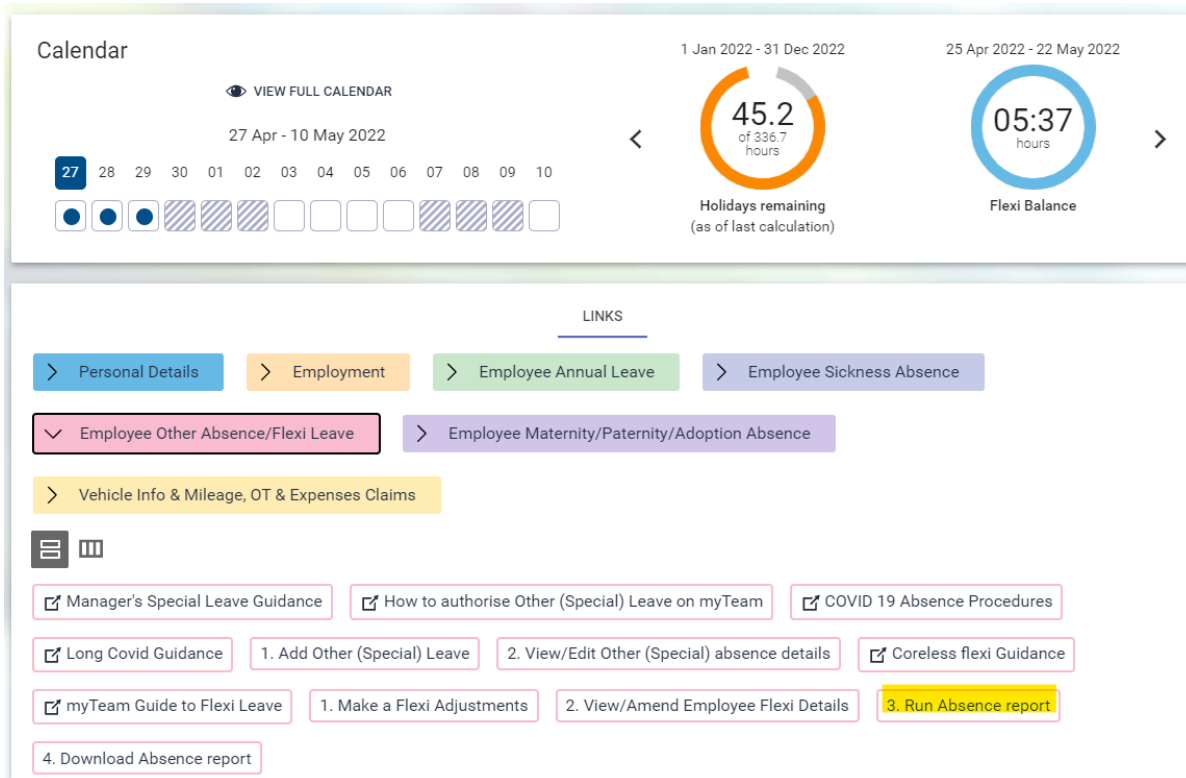
This should be discussed with the employee and advise them that they are required to input the missing recordings retrospectively.

5. Reporting

Managers can also now run three distinct flexi reports as and when required for either an individual or for the whole team. These reports are: **Flexi Balances**, **Flexi History** or **Missing Flexi records**.

5.1 Running a Flexitime Report

To run a report on an employee's flexi record, within the employees record, select "Employee Other Absence/Flexi Leave" and then select "Run Absence report"



The screenshot shows the 'Calendar' section at the top with a date range of 27 Apr - 10 May 2022. Below this is a 'LINKS' section with several navigation buttons. The 'Employee Other Absence/Flexi Leave' button is selected. Underneath, there are several links, with '3. Run Absence report' highlighted in yellow.

Calendar
VIEW FULL CALENDAR
1 Jan 2022 - 31 Dec 2022
25 Apr 2022 - 22 May 2022
27 Apr - 10 May 2022
27 28 29 30 01 02 03 04 05 06 07 08 09 10
Holidays remaining (as of last calculation): 45.2 of 336.7 hours
Flexi Balance: 05:37 hours

LINKS

- Personal Details
- Employment
- Employee Annual Leave
- Employee Sickness Absence
- Employee Other Absence/Flexi Leave**
- Employee Maternity/Paternity/Adoption Absence
- Vehicle Info & Mileage, OT & Expenses Claims

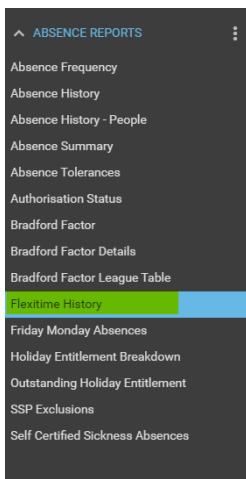
Manager's Special Leave Guidance | **How to authorise Other (Special) Leave on myTeam** | **COVID 19 Absence Procedures**

Long Covid Guidance | 1. Add Other (Special) Leave | 2. View/Edit Other (Special) absence details | **Coreless flexi Guidance**

myTeam Guide to Flexi Leave | 1. Make a Flexi Adjustments | 2. View/Amend Employee Flexi Details | **3. Run Absence report**

4. Download Absence report

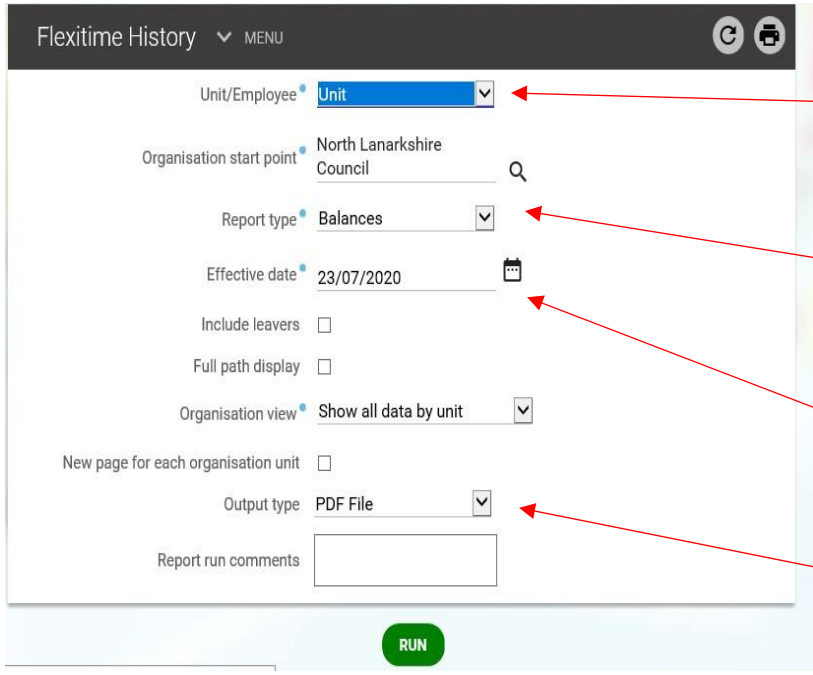
From the list provided on the left-hand side, select 'Flexitime History'



The screenshot shows a vertical menu titled 'ABSENCE REPORTS'. The item 'Flexitime History' is highlighted with a blue bar.

- ABSENCE REPORTS
- Absence Frequency
- Absence History
- Absence History - People
- Absence Summary
- Absence Tolerances
- Authorisation Status
- Bradford Factor
- Bradford Factor Details
- Bradford Factor League Table
- Flexitime History**
- Friday Monday Absences
- Holiday Entitlement Breakdown
- Outstanding Holiday Entitlement
- SSP Exclusions
- Self Certified Sickness Absences

To run a report on all employees that report to you on MyTeam or an individual employee, follow the steps shown below:



The screenshot shows the 'Flexitime History' report configuration page. The interface includes the following fields and options:

- Unit/Employee:** A dropdown menu currently set to 'Unit'.
- Organisation start point:** A text input field containing 'North Lanarkshire Council'.
- Report type:** A dropdown menu currently set to 'Balances'.
- Effective date:** A date picker field showing '23/07/2020'.
- Include leavers:** An unchecked checkbox.
- Full path display:** An unchecked checkbox.
- Organisation view:** A dropdown menu set to 'Show all data by unit'.
- New page for each organisation unit:** An unchecked checkbox.
- Output type:** A dropdown menu set to 'PDF File'.
- Report run comments:** A text input field.

Four callout boxes with red arrows point to specific fields:

- Unit = all employees that report to you**
Employee= individual report (employee name or number for individual employees required)
- Select the report you would like to run:**
Balances, History or *Missing flexi records
- Select the effective date.**
Please note, some reports will ask you for an effective date to and from.
- Select the output type.**
PDF File or CSV File (Excel)

Balances – show all your reportee(s) current flexi balance

History – show all your reportee(s) flexi history

Missing Flexi Records – show each work day date that your reportee(s) has not recorded flexi.

All 3 reports will return information based on the dates you select the date fields.

New Page for each organisation unit – if ticked, this will ensure that units/employees have a separate page for each individual.

*Please note, for the Missing Flexi Records report, when in 'Unit' you must do a search for the appropriate 'Organisation Start Point', i.e. search for your specific unit that you/your reportees work in. (See the example on the next page).

This level of search is only required for missing flexi records report. Balance and history reports do not require this level of searching.

Flexitime History

Flexitime History MENU
↻ 🖨️ 📎

Unit/Employee Unit ▼

Organisation start point People & Organisational Development 🔍 ←

Report type Missing flexi records ▼

Record from 28/07/2020 📅

Record to 28/07/2020 📅

Include leavers

Full path display

Organisation view Show all data by unit ▼

New page for each organisation unit

Output type PDF File ▼

Report run comments

RUN

For example, if you were the manager of the Recruitment Team, click 🔍 at 'Organisation start point' and then in the search bar type ***Recruitment** and then select the unit that you are responsible for as shown below.

Flexitime History

Flexitime History MENU
↻ 🖨️ 📎

Unit/Employee Unit ▼

Org. units search ✕

*recruitment 🔍 Results 1 Unit

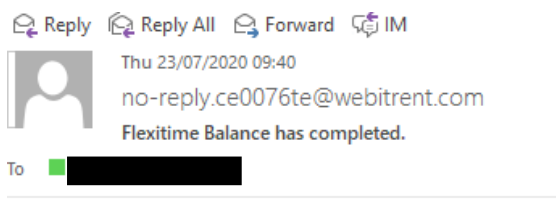
Organisation unit	Linked to	Status	Unit reference
Recruitment	Employee Service Centre	Live	UNIT1488

RUN

RUN

Once you have completed all of the criteria above, select

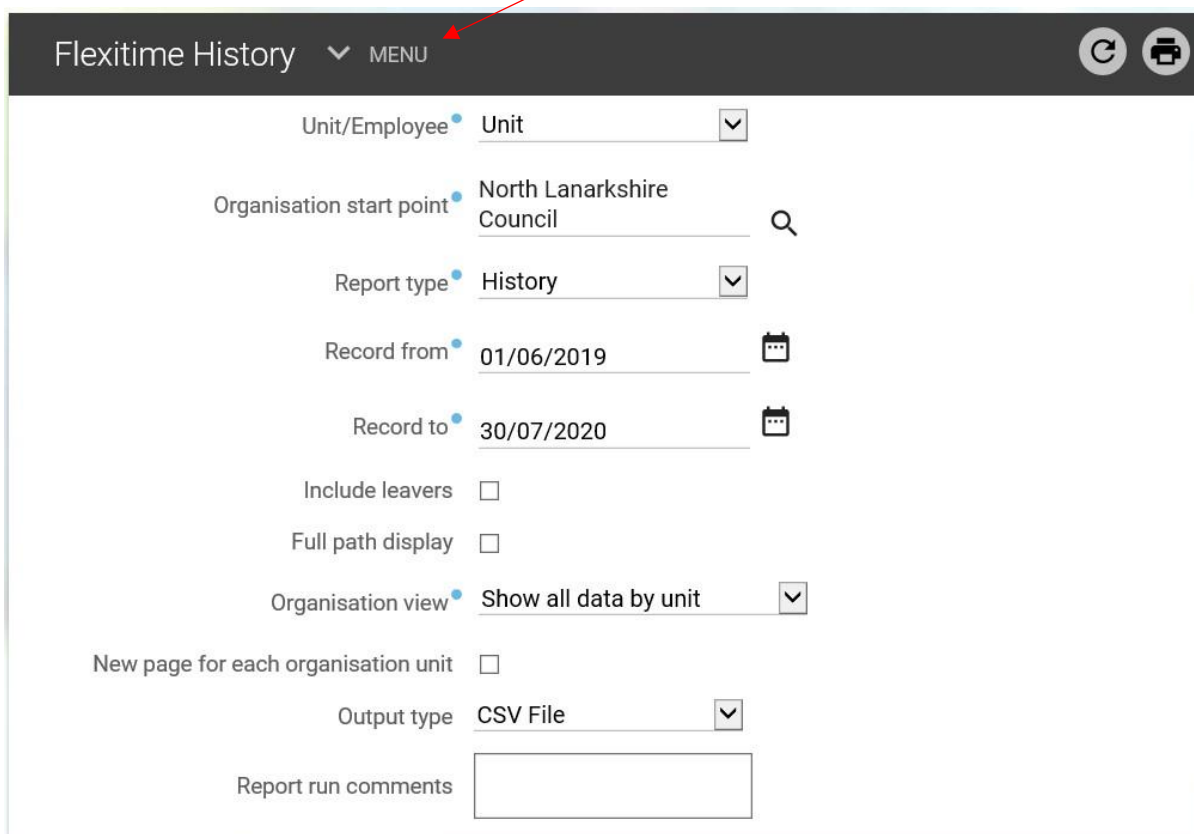
You will be notified by email when your report is ready, example of email shown below:



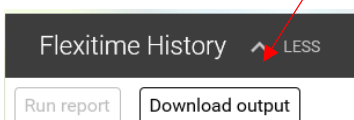
Report "Flexitime Balance" has completed.


5.2 Viewing your report

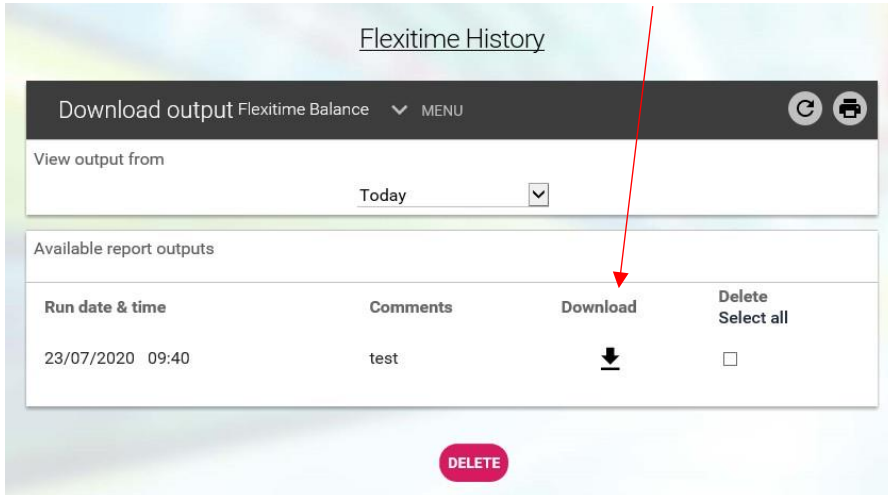
To view your report, at the top of the criteria page, select Menu. (The reports are quick to run however if you're no longer on this page below, please follow step 5.1 above and click *Download output*.)




Select 'Download output'



Click  to download and open your report as shown below:



Run date & time	Comments	Download	Delete Select all
23/07/2020 09:40	test		<input type="checkbox"/>

Select 'open'. This will open your report in a new window. You can then save this if required. Example of a report in PDF format is shown below.

Missing Flexi Records			
Absences From:	01/06/2020	To: 30/07/2020	Organisation View: Full
Employee Name:	[REDACTED]		Include Leavers: No
Organisation Start Point:	North Lanarkshire Council		
			No Clock In Date
North Lanarkshire Council/....			22/07/2020
[REDACTED]			29/07/2020
[REDACTED]			30/07/2020

These reports can be run by managers as frequently as required.

6. Authorisation

It will be the employee's responsibility to record their flexi details for each day they are working – arrival, lunch depart, lunch arrival and depart etc. You will be able to view/amend and delete if required.

You will only be required to approve flexi leave. Requests are found within your to-do-list within myTeam. A direct link will also be contained within your email alerts.