hh2 User Guide

Remote Payroll

For the Manager Role

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Remote Payroll Capabilities and Benefits

The Remote Payroll (RP) Module assists with:

- **Precise Hour Logging and Coding:** The hh2 system assists in logging and categorizing every hour of work with precision, providing accurate insights into time allocation for more effective resource management and project planning.

- **Effortless Data Routing:** Seamlessly route time tracking data to all stakeholders, including end users, in real-time, promoting enhanced collaboration, transparency, and informed decision-making through accessible, relevant time data.

- **Integration with Accounting Systems:** Synchronize time tracking seamlessly with the accounting system, streamlining financial reporting by automatically linking time data with the accounting software, eliminating manual data entry errors, and ensuring precise billing and payroll processes.

- **Comprehensive Time Entry and Management:** Easily enter, code, submit, route, and import time within the system, effectively managing all facets of time tracking, from data entry to approval workflows. This simplifies time management processes, reducing administrative overhead, and ensuring compliance.

- **Flexible Time Entry Methods:** Enter time using daily, weekly, or batch methodologies to suit workflow and preferences, this allows the user to adapt to deadlines while maintaining precise records.

- **Time-Saving Autofill and Copy Functions:** Automate data entry using autofill and copy time functions to significantly speed up the process, reducing repetitive tasks and increasing productivity, thus allowing more focus on critical activities.

- **Customizable Routing and Approval Workflows:** Users can implement customizable routing and approval systems within their organization, empowering them to define approval processes tailored to their unique needs and hierarchical structure. This customization significantly improves efficiency by ensuring that time entries follow the appropriate path for review and authorization, ultimately reducing bottlenecks in the workflow.

Users that will Benefit from this User Guide

- Payroll Clerk
- Field Supervisor
- Project Manager
- Payroll Manager
- Payroll Administrator

Note: A Payroll Administrator may also function as a Payroll Manager.

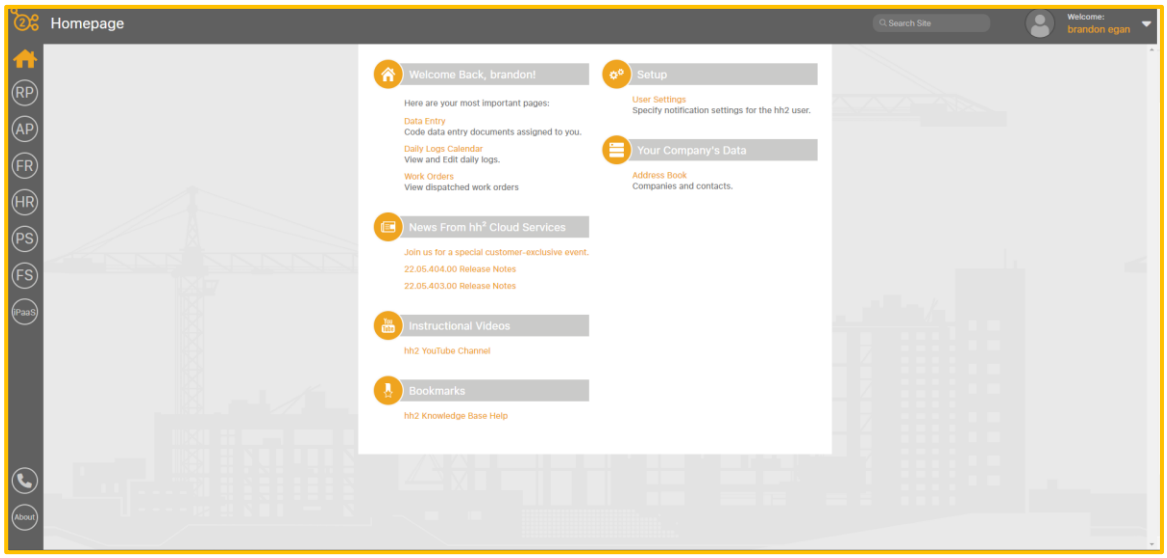
Note: A comprehensive Glossary of Terms is available at the end of this document. It includes hh2 terminology for all product areas and some general industry language.

Note: This User Guide is intended to be used alongside the software for maximum comprehension.

Home Page

Upon log in, the user is brought to the Home Page.

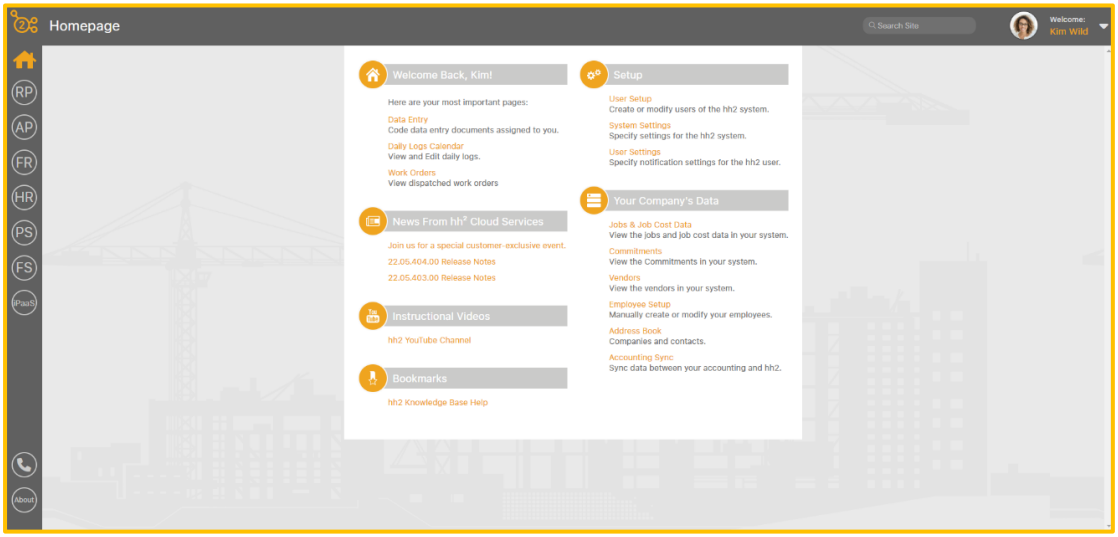
The Home Page will appear differently for different users depending on the modules purchased, the user role, and permissions granted.



This is an example of how the Home Page may appear for a Foreman out in the field.

Note: The Home Page icon is present on all pages. A colored Home Page icon indicates the user is situated on the Home Page. Use this icon to navigate back to the Home Page.

This is how a Home Page may appear for users such as a manager, with many permissions.



The Modules the user has access to are listed in the left column.

Modules include:

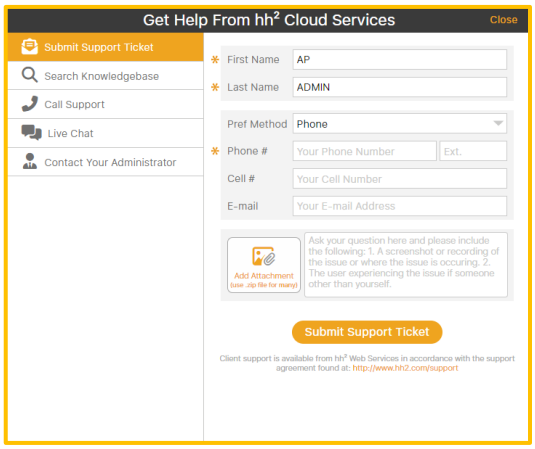
- Remote Payroll indicated by the RP link.
- Document Flow indicated by the AP link.
- Field Reports indicated by the FR link.
- Human Resources indicated by the HR link.
- Pay Stubs indicated by the PS link.
- Field Service indicated by the FS link
- The iPaaS Channel iPaSS link. This channel is for users that synchronize data between the hh2 and 3rd party providers such as Procore, Autodesk and Trimble.

Each link will take the user to the associated module of the hh2 system by clicking on it.

The Phone icon sits below the Module links. The Phone icon is used to reach out to hh2 Customer Support, after the implementation process. When selected, the Get Help From hh2 Cloud Services Page displays.

To Submit a Customer Support Ticket:

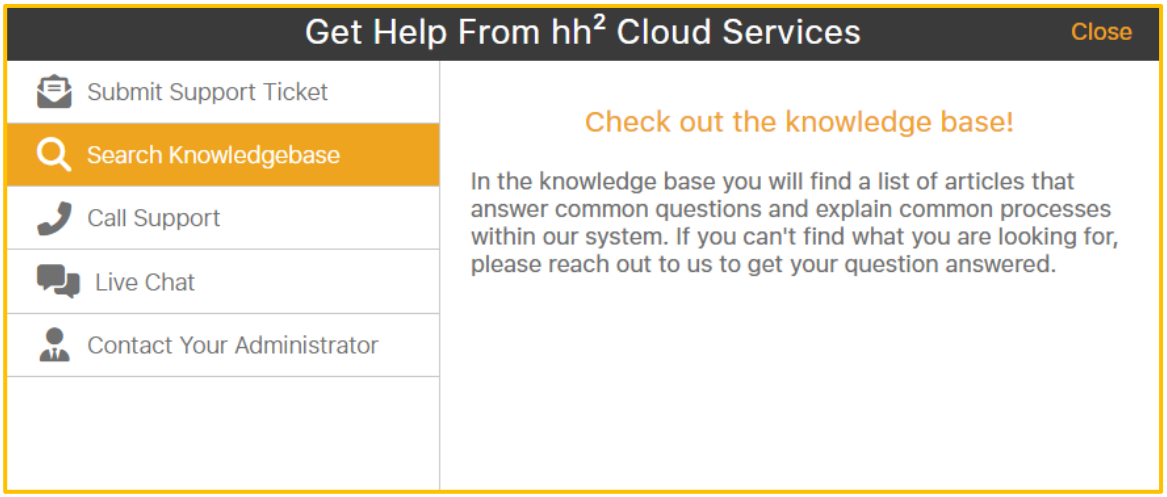
1. Go to the Home Page.
2. Select the Phone Icon.



3. Select the Submit Support Ticket tab in the upper left corner.
4. Enter any information that has not automatically populated from the User Profile.
5. Select Add Attachments if there are supporting documents.
6. Select Submit Support Ticket.
7. A Customer Support Agent will reach the individual with the contact information provided.

To Search the Knowledgebase:

1. From the Home Page, select the Phone icon.
2. Select Search Knowledgebase.
3. Click on the words, “Check out the knowledge base!”

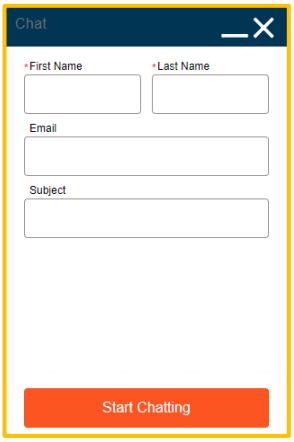


4. Search the knowledge base using key words in the Search field or select a box by product area.
5. Close the browser when complete to return to the Home Page.

To Contact hh2:

1. Select the Contact Us

icon at the bottom of any page. This will be displayed for Administrators only.



2. Enter the data requested.
3. Select Start Chatting.

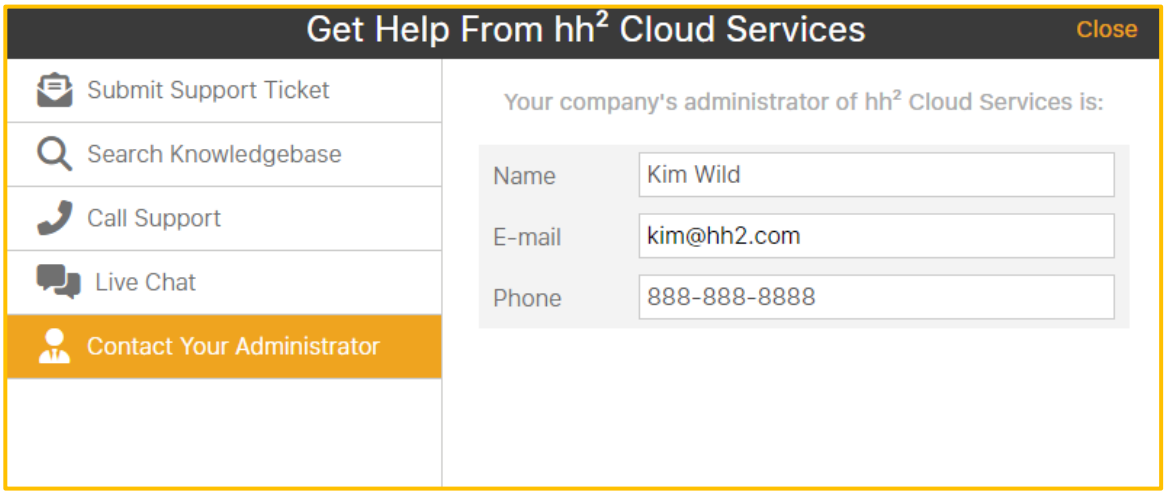
4. Type your message and an expert will reply.
5. When complete, select X.
6. Select Confirm End Chat.
7. Select Close.

Note: Call Support and Live chat are an add on subscriptions available to Pro Support customers and only available to users with System Administrator permissions enabled.

To Contact Your Administrator:

This allows the user to contact the system administrator at the construction company.

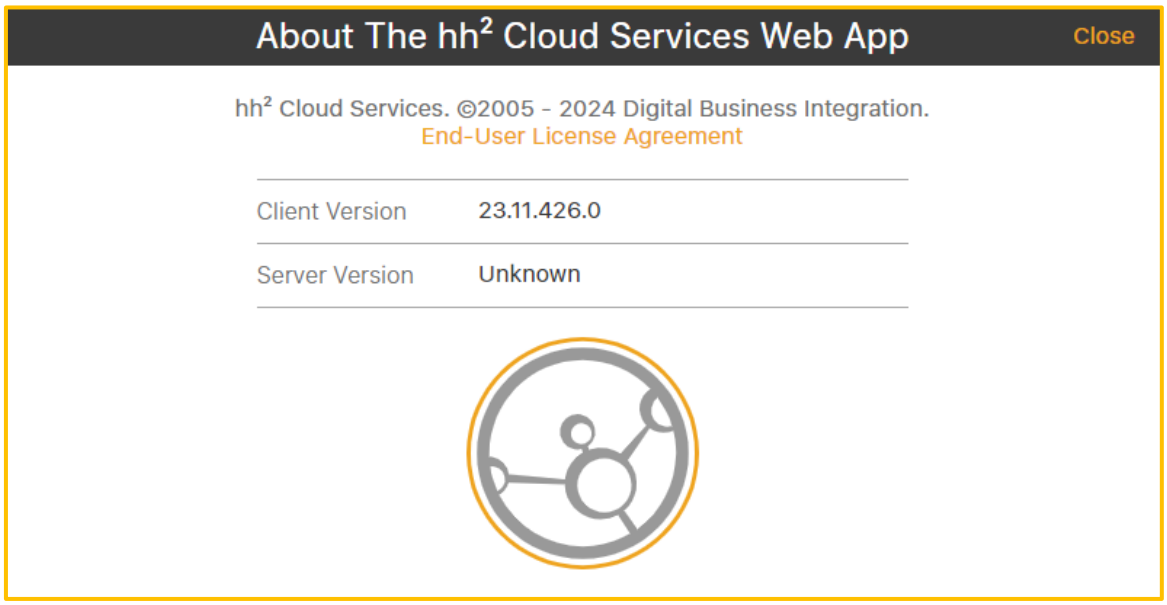
1. From the Home Page, select the Phone icon.
2. Select the Contact Your Administrator tab.



3. The contact information will be provided.

The About Icon:

The About icon provides the user with version and server information. This is useful information when contacting Customer Support.



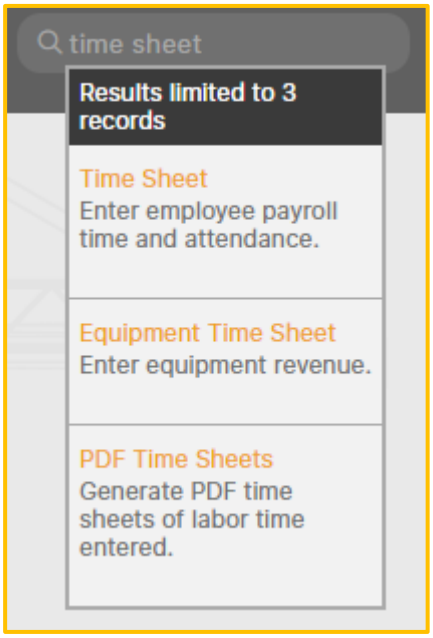
The Top Task Bar on the Home Page

Along the top of the Home Page there are other tools. Those tools include the Search Sitemap tool, the User Avatar, and User Profile Information.

The Search Sitemap field allows the user to search for any feature the user has permission to access.

To Use the Search Sitemap:

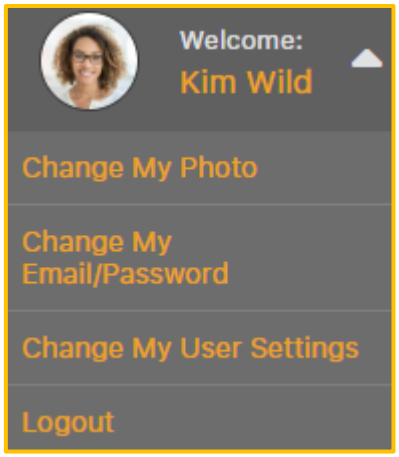
1. Enter a topic or partial topic.
2. The field will auto-populate with potential topics.



3. Select the topic title with a click.
4. The system will automatically navigate the user to the associated hh2 page if permissions are granted to that user.

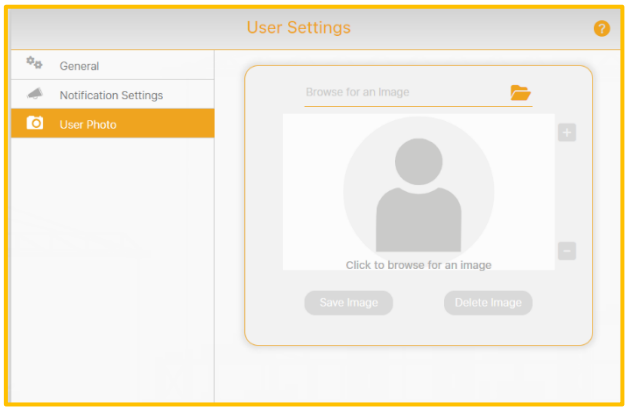
User Avatar:

By clicking on the User Avatar icon or username, the Profile Data Picklist and associated links appear.



To Upload a Photo:

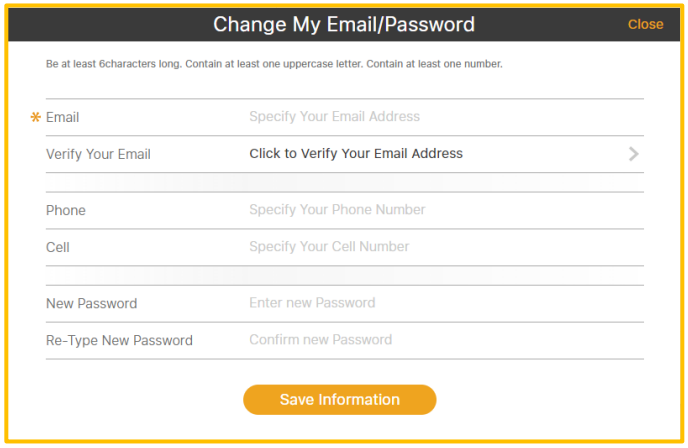
1. Select the User Avatar icon or username.
2. Select Change My Photo.



3. Select the Folder icon to browse for an image.
4. Select the file that contains the photo.
5. Select Open.
6. The image can be sized using the + and — icons.
7. Select Save Image.
8. Select Delete Image to delete the current photo.

To Change Email or Password Information:

1. Select the User Avatar icon or username.
2. Select Change My Email/Password.

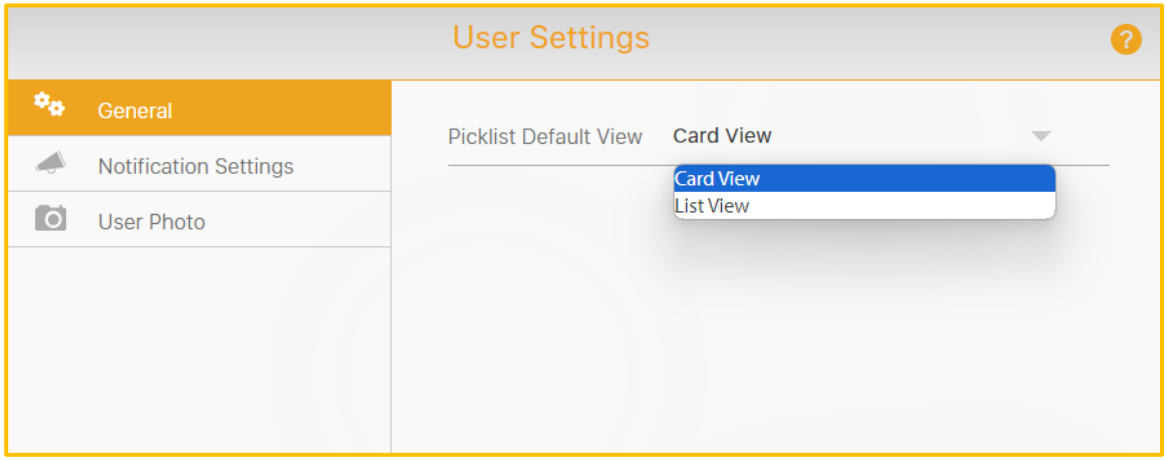


3. Enter the Email and Verify the Email Address.
4. Enter Phone and Cell Numbers. These numbers are used for contact information when submitting a Support Ticket.
5. Enter and Confirm a new password.
6. Select Save Information.

To Change User Settings

User Settings are unique to each user.

1. Select the User Avatar icon or username.
2. Select Change My User Settings.

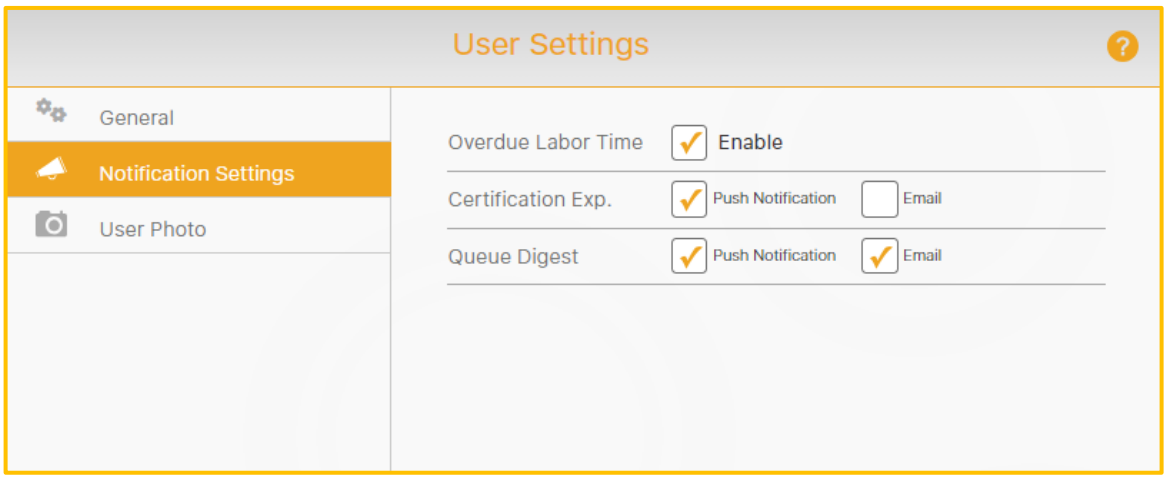


In the **General Tab of the User Settings Page**, users can select their Picklist preference. A Picklist, also known as a dropdown list, is a menu-like interface element often seen in forms and websites, offering users a set of predetermined choices to pick from, enhancing data entry efficiency and uniformity. In hh2 Picklists are either in Card View or List View format. The default is Card View.

To Select a Picklist Preference:

1. Select the User Avatar icon or username.
2. Select Change My User Settings.
3. Select the General tab.
4. Click the Picklist arrow.
5. Select user's preference (either Card View or List View).
6. When the Ajax ✓ icon appears, the selection has been saved.

In the **Notification Settings Tab of the User Settings Page**, users can choose how they wish to be notified of events that relate specifically to their job role. For example, a user in the Admin Role may wish to receive notifications when overtime occurs. Other users may wish to know when certifications expire or when actions related to invoices are required by them. These notifications can occur via push notifications, email, both or not at all.



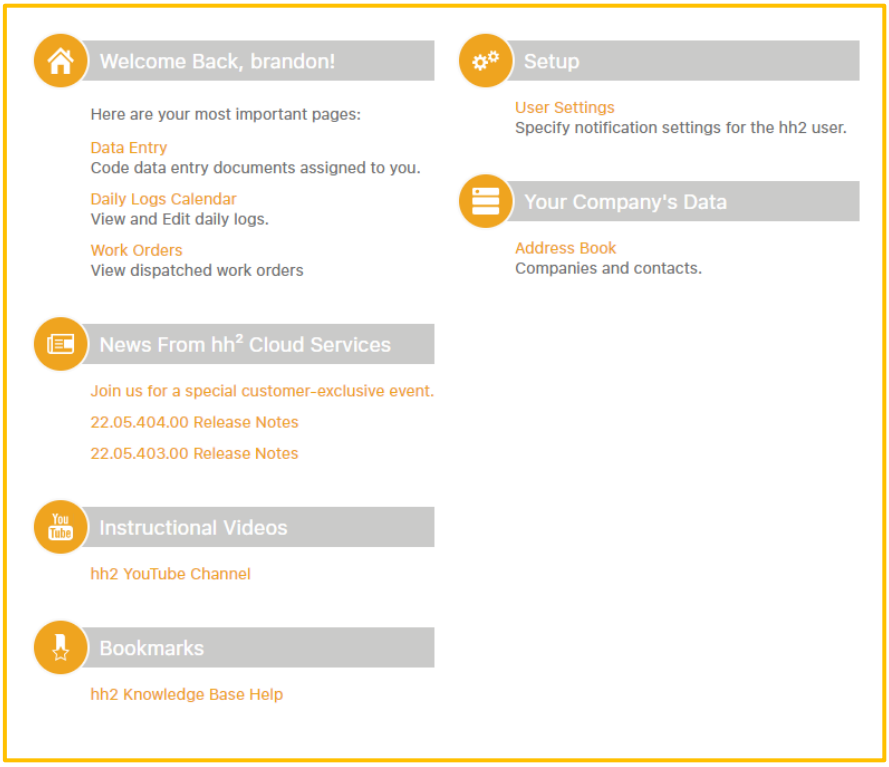
To Set Notification Settings:

1. Select the User Avatar icon or username.
2. Select User Settings>the Notification Settings tab.
3. Check Overdue Labor Time (if using the Remote Payroll Module) to be notified of Overtime.
4. Next to Certification Expiration, check the preferred method of notification when Certifications have expired (if using the HR Module): Push Notification, mail, both or uncheck for no notifications.
5. Next to Queue Digest, check the preferred method of notification when there are Workflow items in the user's Primary Queue to be approved or rejected: Push Notification, Email, both or uncheck for no notifications. This is used in conjunction with the Document Flow module.

User Photo Tab of the User Settings Page. See To Upload a Photo.

The Middle of the Home Page

The appearance of the Home Page's middle section will vary depending on the modules purchased, user roles, and permissions. Administrators and Managers will experience different functionality on their Home Page than other users.



However, all users will have:

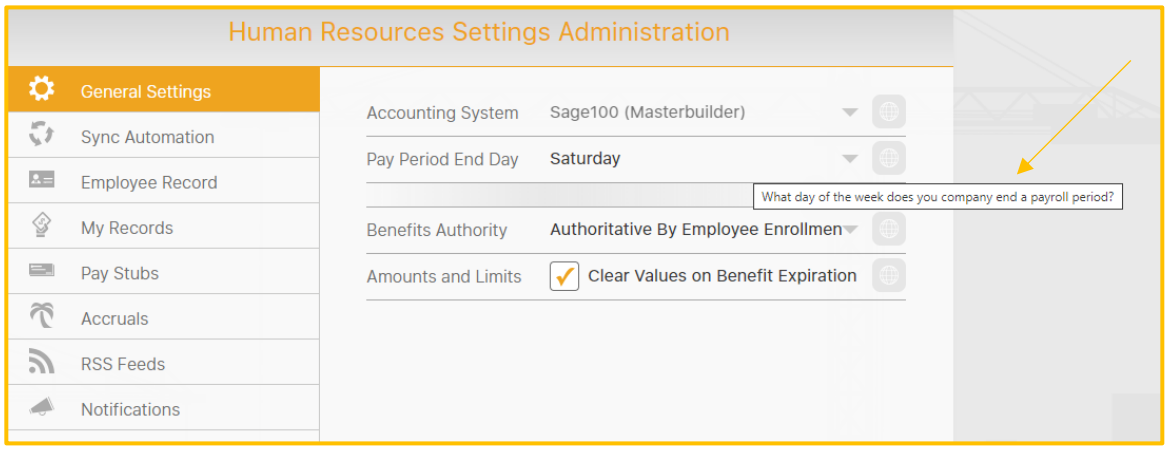
- Their **most important pages**, based on the modules and permissions they use.
- **News From hh2 Cloud Services**, with information on the latest software updates.
- Links to **Instructional Videos**.
- A **Bookmarks** section that allows quick access to important websites.
- A User **Setup** link to set their personal settings.
- **Your Company's Data**.

The Tool Tip

Throughout the system, the Tool Tip can be used to obtain a quick description of the associated item.

To Use the Tool Tip:

1. Hover the mouse over the topic where additional information is needed. In this case, Pay Period End Day. It will turn white.



2. A description will automatically display.

System Setup and Configuration

Prior to using the Remote Payroll module, the following set up and configurations are required:

Home Page:

- ✓ User Set Up
- ✓ System Settings
- ✓ Your Company's Data Section

Remote Payroll Page:

- ✓ System Settings
- ✓ Payroll Users (permissions set for Payroll Managers and Administrators)
- ✓ Employees
- ✓ Equipment (if applicable)
- ✓ Payroll Groups
- ✓ Jobs
- ✓ Standard Accumulations
- ✓ G.L. Accounts
- ✓ Pay Types
- ✓ Pay Type Groups
- ✓ Shifts (if applicable)
- ✓ Manager Types (if applicable)
- ✓ Integration Formats

In general, when an Administrator signs into hh2, set up and configuration will be located on the right side of the page and use tools are located on the left side of the page.

The key sections the software utilizes for Remote Payroll are located on the left side of the RP Home Page. They are:

- RP>Time Sheet
- RP>Time Record Entry
- RP>Time Approval
- RP>Labor Export
- RP>Reporting
- RP>Punches and Attendance and RP>Equipment Revenue, if applicable.

hh² Remote Payroll
Close
Track Labor Time
Time Sheet
Enter employee payroll time and attendance.
Time Record Entry
Enter time in a record-based list view
Time Approval
View weekly totals and approve payroll time.
Labor Export
Export transactions to your accounting system.
Punches & Attendance
Punch Clock
Punch Employees In & Out With Coding
Crew Punch Clock
Punch Accessible Employees In & Out With Coding
Punch Management
Manage punches for accessible employees
Attendance Punch Clock
Punch Employees In & Out
Attendance Worksheet
View and Enter Batch Attendance
Equipment Revenue
Equipment Time Sheet
Enter equipment revenue.
Equipment Time Record Entry
Enter eq. revenue in a record-based list view
Equipment Time Approval
View weekly eq. revenue totals and approve.
Equipment Time Export
Export transactions to your accounting system.
Reporting
Labor Detail
View, print, or download employee payroll time.
Labor Hours and Productivity Summary
Generate PDF summary report of budgeted and actual labor hours and production units.
Equipment Detail
View, print, or download eq. revenue time.
PDF Time Sheets
Generate PDF time sheets of labor time entered.
Mobile Apps
Apple iPad and iPhone
Enter time and attendance; provide signatures.
Google Android
Record based time entry and approval.
Settings
System Settings
Settings for Remote Payroll.
Payroll Users & Groups
Payroll Users
Setup users who login and access payroll.
Employees
Setup employees to whom time is coded
Equipment
Setup equipment for revenue
Payroll Groups
Setup groupings of employees and managers.
Jobs
Setup jobs and job managers.
Standard Accumulations
Setup accumulations.
G.L. Accounts
Setup accounts and account managers.
Payroll Configuration
Pay Types
Setup the pay types of your accounting system.
Pay Type Groups
Organize your pay types and allow using them.
Shifts
Setup your company's shifts
Manager Types
Set descriptions of group and job managers.
Integration Formats
Setup columns for exporting payroll transactions.

The Remote Payroll Process

There are four steps in the Remote Payroll process.

1. **Time Entry:** Typically, users in the field will enter their time for labor and equipment (if applicable). This can be completed via the webpage or mobile application. Time may also be added via a Punch Clock method.

2. **Workflow:** The time will then be sent through the Approval Path of the Payroll Group by which the employee is designated. This provides individuals in various job roles to review the time prior to the Payroll Manager conducting a final review and approval. During the Workflow step, time can be approved, denied, modified, and promoted to levels within the Approval Path.

3. **Review and Final Approval:** The Payroll Manager is the last job role in the Approval Path. All time must be reviewed for correct coding by the Payroll Manager. There are several ways for the Payroll Manager to review submitted time. Reports within hh2 can assist with this process. After the Payroll Manager ensures the time is coded correctly, final approval must occur.

4. **Export to the Accounting System**: After the time has been entered, approved, reviewed, and received final approval, it is then exported to the accounting system.

Step 1: Time Entry

Employee time can be entered in the following ways for Labor:

- Via the Labor Time Sheet
- Via the Time Record Entry
- Through the Punch Clock, if enabled. See Punches and Attendance.
- Via Mobile Apps by users in the field

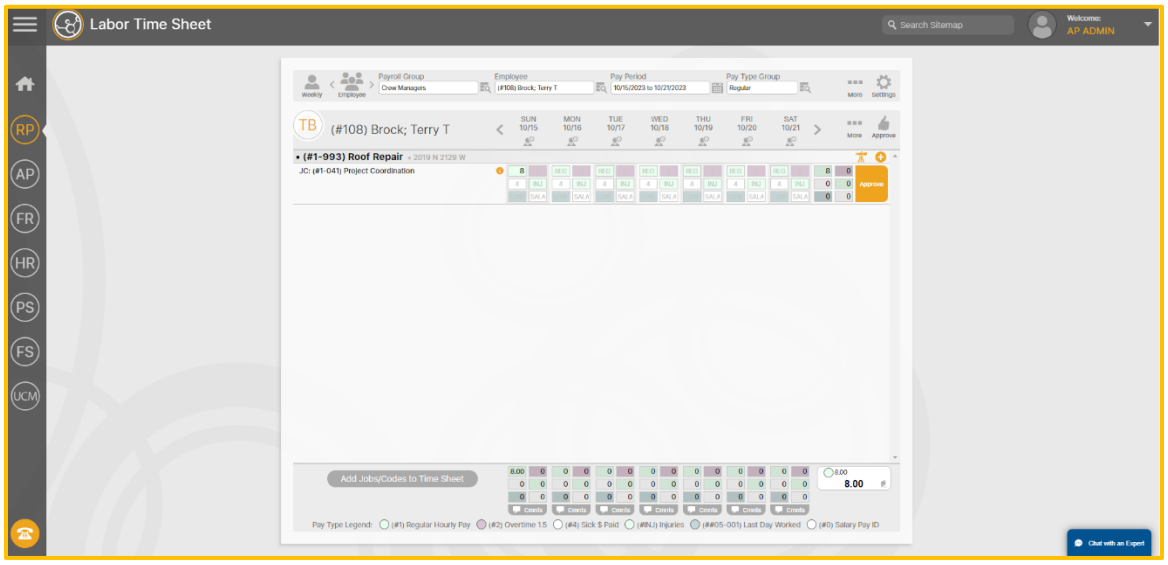
Time can be logged and coded against Equipment in the following ways:

- Via the Equipment Revenue Time Sheet
- Via the Equipment Time Record Entry
- Via the Labor Time Sheet
- From Mobile Apps users in the field, using similar pages.
- See Equipment.

Time Sheet (Labor Time Sheet)

The Labor Time Sheet is where the Payroll Manager can view, code, and add hours. However, most often, employees will add their own time, or time for employees they manage. This is dependent upon the Approval Path set up. Users will add their time either from the website or a mobile application. This guide will address time management from the website.

Navigation: RP>Track Labor Time>Time Sheet



The Labor Time Sheet Page filters by:

- Payroll Group
- Employee Name
- Pay Period
- Pay Type Group

On the Labor Time Sheet, the Payroll Manager can toggle between Weekly and Daily views using the Weekly View

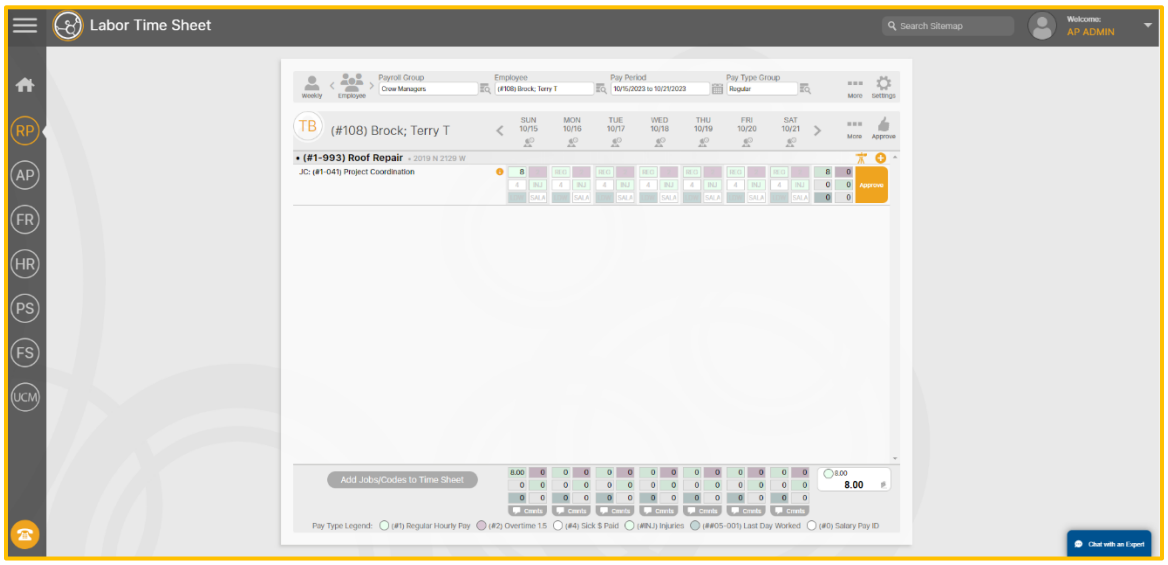
icon in the upper left corner and move quickly between employees using < or >. Daily views are considered a shared view, and the user can see more than one employee at a time.

Note: The order of the search fields will vary based on the Weekly or Daily view of the page.

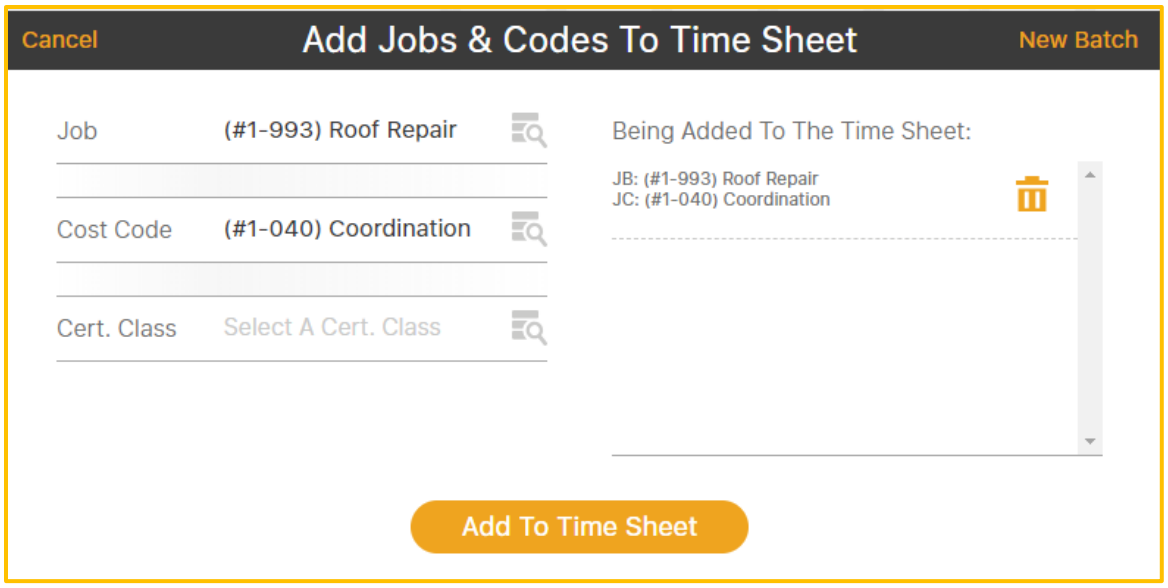
To Add Time to the Labor Time Sheet Page Using the Weekly View:

This feature will allow the user to add time for one employee for a week (or Pay Period as defined in the Remote Payroll>Settings >System Settings>General Settings>Pay Period Length).

1. Navigate to the Labor Time Sheet (RP>Track Labor Time Sheet>Time Sheet).



2. Select the Weekly View icon in the upper left corner of the Labor Time Sheet.
3. Select the Payroll Group.
4. Select the Employee.
5. Select the Pay Period.
6. Select the Pay Type Group.
7. If the appropriate Job and Cost Code is listed, simply key the hours in the applicable box adjacent to the Cost Code. The time will automatically save. Jobs and Cost Codes will display after the first time they have been added to the Labor Time Sheet.
8. If the appropriate Job and Cost Code is not listed, Select Add Jobs/Codes to Time Sheet to add a Job or Cost Code to the Labor Time Sheet and proceed with the steps that follow. Note: If the option for Default Coding is selected in the Payroll Group (RP>Payroll Users and Groups>Payroll Groups>specific Payroll Group>Settings>Default Coding), the user can choose to code to Default Coding instead of a Job and Cost Code.



9. Select a Job on the Add Jobs and Codes to Time Sheet Page.
10. Select a Cost Code.
11. Select Add Selected Items from the Select a Standard Cost Code Page.
12. Select a GL Account, Certification Class, Shift, or Union information, if applicable.
13. Select Add to Time Sheet. Note: Information entered can be removed using the Delete icon.
14. The New Batch feature (in the upper right corner) allows the user to continue to code multiple Jobs and Cost Codes to the Labor Time Sheet without having to exit and reenter the Add Jobs and Codes to Time Sheet Page. This is a handy feature if multiple Jobs and/or Cost codes are added at once. See To Add Multiple Jobs and Cost Codes to a Labor Time Sheet.
15. Once the Job and Cost Code is added onto the Labor Time Sheet, key the appropriate number of hours for each Pay Type adjacent to the Cost Code (just as in step 7). Pay Types are color coded. Notice the Pay Legend at the bottom of the page.

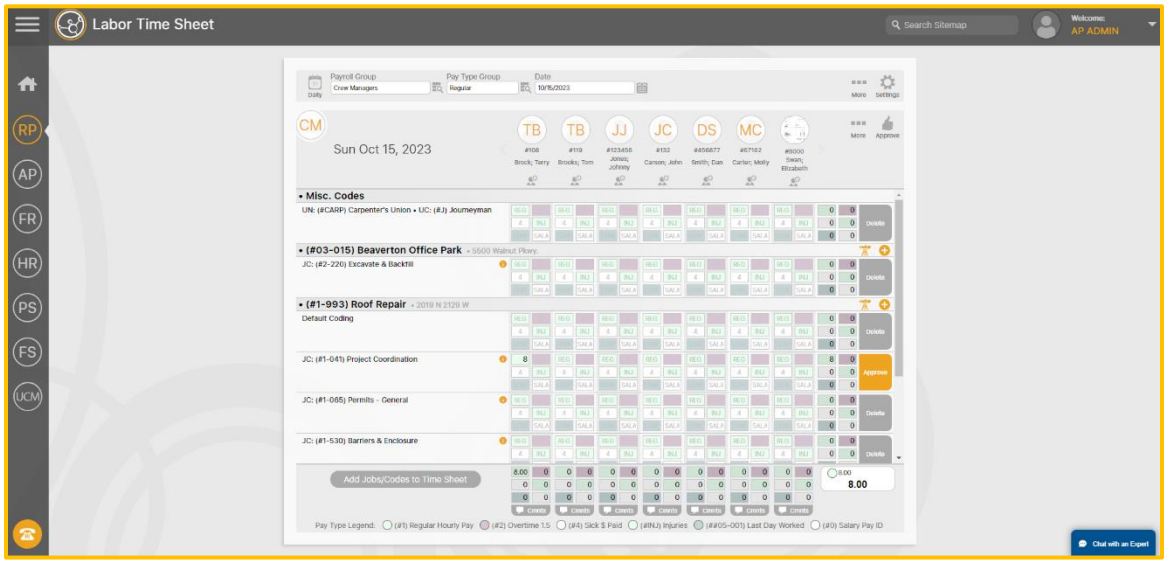
Note: The Pay Type hour fields adjacent to the Job Code (or Default Coding) are where time is keyed versus the Pay Type hour fields at the bottom of the page which represent totals.

Note: This process will change based on Payroll Settings and User Preferences. See Unit Custom in the Payroll Group and Quick Time Setting in User Settings.

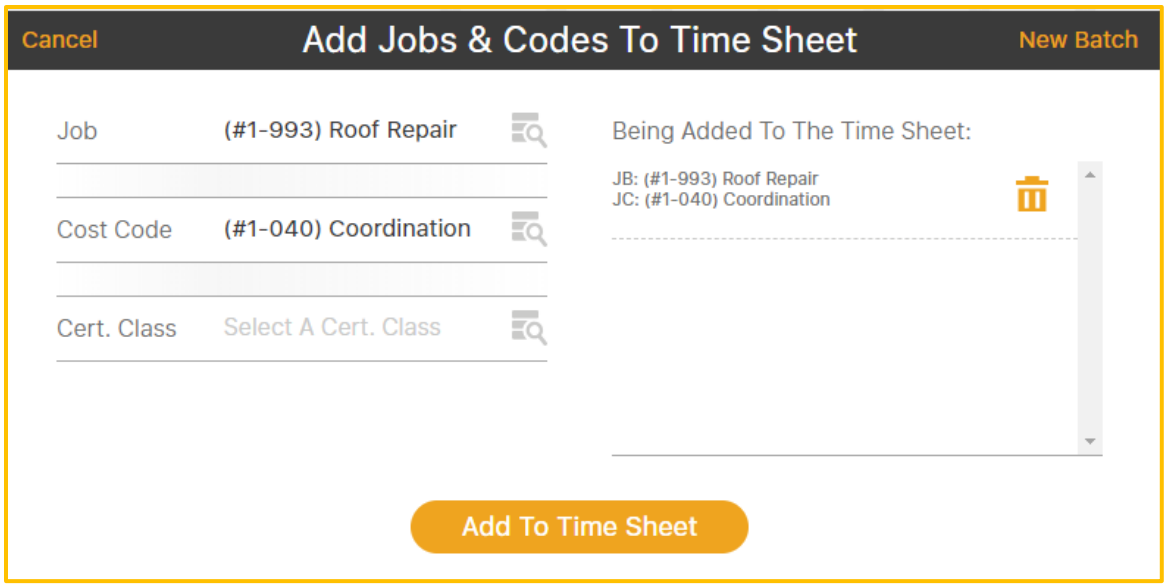
To Add Time to the Labor Time Sheet Page Using the Daily View:

This feature allows the user to add time for multiple employees in a Payroll Group daily.

1. Navigate to the Labor Time Sheet (RP>Track Labor Time>Time Sheet).



2. Select the Daily view in the upper left corner.
3. Select the Payroll Group.
4. Select the Pay Type Group.
5. Select the Date.
6. On the Labor Time Sheet, key the appropriate number of hours for each Pay Type in the column beneath the employee's name by Job Code and Cost Code. If no Cost Code was selected the line item will read Default Coding. Pay Types are color coded. Notice the Pay Legend at the bottom of the page.
7. Jobs and Cost Codes will display once they have been added to the Labor Time Sheet.
8. If the appropriate Job and Cost Code is not listed, Select Add Jobs/Codes to Time Sheet to add a Job or Cost Code to the Labor Time Sheet.



9. Select a Job on the Add Jobs and Codes to Time Sheet Page.
10. Select a Cost Code.
11. Select Add Selected Items from the Select a Standard Cost Code Page.
12. Select a GL Account, Certification Class, Shift, or Union information, if applicable.
13. Select Add to Time Sheet. **Note:** Information entered can be removed using the Delete icon.
14. The New Batch feature allows the user to continue to code multiple Jobs and Cost Codes to the Labor Time Sheet without having to exit and reenter the Add Jobs and Codes to Time Sheet Page. This is a handy feature if multiple Jobs and/or Cost codes are added at once. See To Add Multiple Jobs and Cost Codes to a Labor Time Sheet.

Unit Custom in the Payroll Group and Quick Time Setting in User Settings:

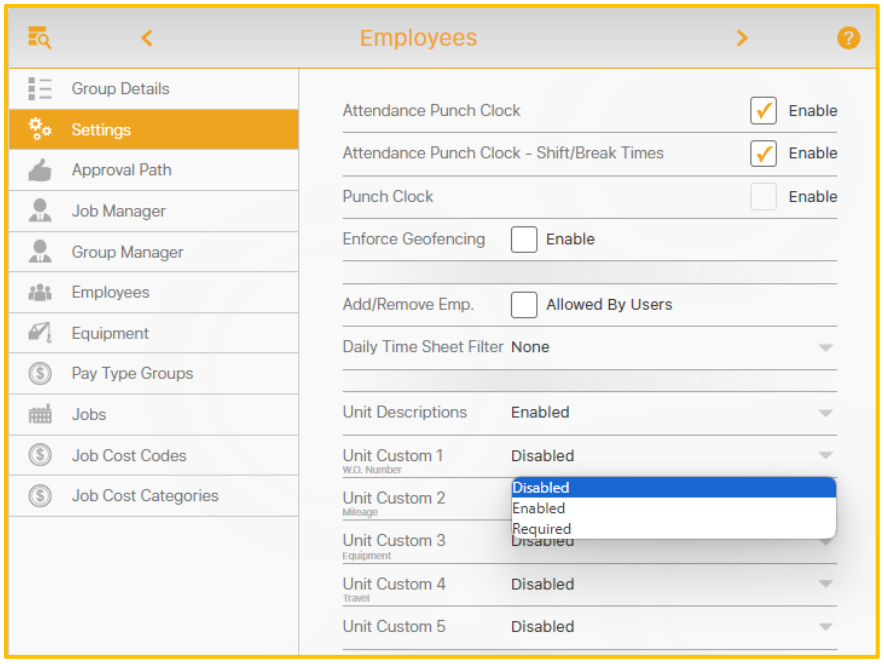
The Add Time Record Page may be displayed based on the Payroll Group or by user preference. This feature allows for unit specific comments to be made. **Use Case:** Some construction companies want to force the Add Time Record Page to appear, so there is a place to house a Work Order or Equipment Number, for instance, in the Description field or Unit Custom fields on the Add Time Record Page.

To Require or Enable the Add Time Record Page to Display During Time Entry:

1. For set up by **Payroll Group:** Navigate to RP>Payroll Users and Groups>Payroll Groups>specific Payroll Group>Settings>Unit Customs >Enabled. The Unit Customs can be customized to meet the needs of the construction company for the specific Payroll Group. For instance, the Unit Customs field may be set to require entry or a Work Order number, Equipment number or other tracking needs of the construction company.

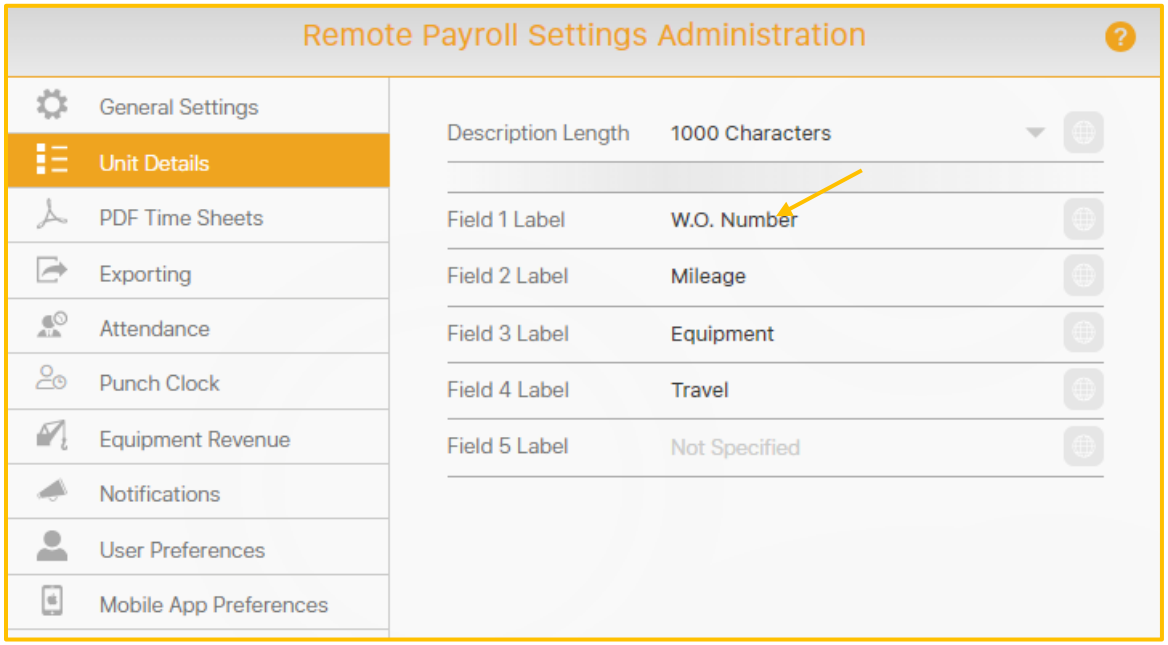
Unit Customs may be set to:

- **Disabled** (which will enable the regular time entry process only without the Add Time Record Page)
- **Enabled** (which will display the Add Time Record Page during time entry)
- **Required** (which will require entry into a field during time entry).
- **Note:** Unit Descriptions may be set to Enabled, Disabled or Required



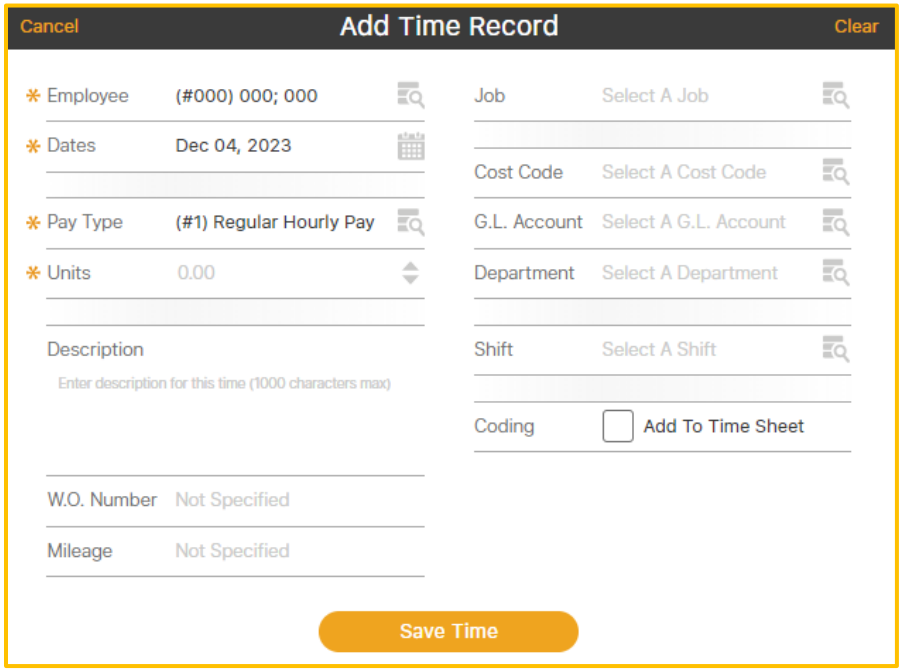
Further, the Unit Customs fields are named in RP>Settings>System Settings>Unit Details>name the field, such as Work Order or Equipment.

In the example below, Field 1 Label would correspond with the Unit Custom 1 Field (W.O Number) in the Payroll Group.



2. For set up by **User Preference:** The logged-in user may also wish to set their user specific preferences to force the Add Time Record Page to be displayed. This will enable the user to write an entry in the Description field. To set up the **User's Specific Preference:** RP>Track Labor Time>Time Sheet>More…(at the top)>Settings>User Settings>Quick Time>Always or Click and Hold. The Default is Disabled and will move the user through the process previously described for Adding Time to the Labor Time Sheet for the Weekly and Daily Views.

3. When either of these settings are enabled the Add Time Record Page will display once the Pay Type hours are entered adjacent to the Job Code (or Default Coding) on the Labor Time Sheet.



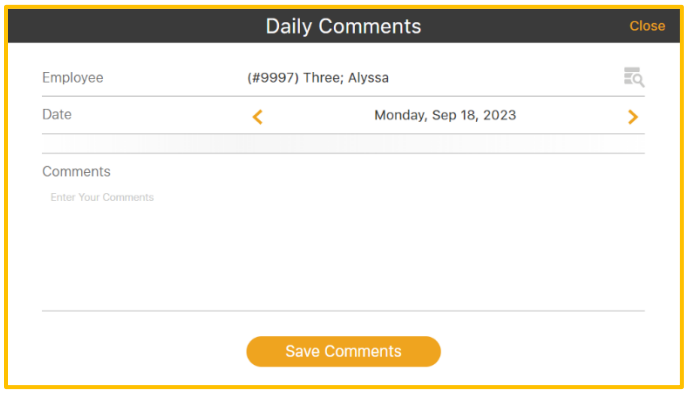
4. Enter the number of hours in the Units field. Add a Description and if a Unit Custom field was set up, it will be either required or available for data entry, based on the aforementioned set up.
5. Check the Coding box to save the time Units and add the coding to the Labor Time Sheet for later use.
6. Select Save Time.

Comments:

The Comments icon: Employees or managers can enter a comment on the Labor Time Sheet (RP>Track Labor Time>Time Sheet). When a comment is added on the Labor Time Sheet, the comment icon will be shown in color on both the Labor Time Sheet and Labor Time Approval Pages.

Use Case for Comments: Comments may be used to explain time. For instance, an employee who only works five hours, due to a dental appointment can comment about the five-hour day. This feature aids the Payroll Manager and others in understanding discrepancies when reviewing time.

Note: The Daily comment at the bottom of the Labor Time Sheet encompasses the entire day, while the Unit Descriptions (added on the Add Time Record) are specific to a line item on the Labor Time Sheet. Unit Comments will color the box on the Labor Time Sheet, so the Administrator is aware there is a comment associated with the time.



Payroll Managers may also add a comment to the time.

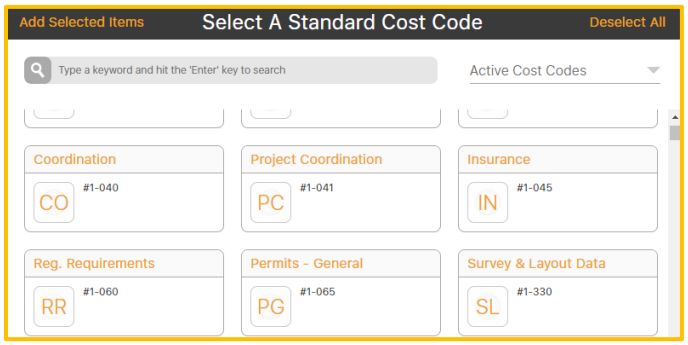
To Add a Comment:

1. Select the Comments icon at the bottom of the Labor Time Sheet.
2. Enter the comment in the Comments section.
3. Select Save Comments.

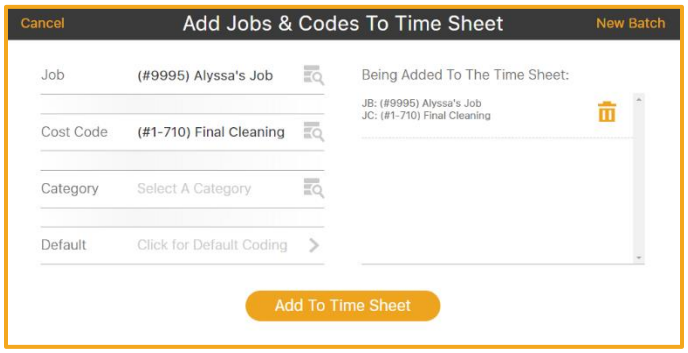
To Add Multiple Jobs and Cost Codes to a Labor Time Sheet Using the New Batch Feature:

The New Batch feature allows the user to continue to code multiple Jobs and Cost Codes to the Labor Time Sheet without having to exit and reenter the Add Jobs and Codes to Time Sheet Page. This is a handy feature if multiple Jobs and/or Cost codes are added at once.

1. Select the Add More Cost Codes icon on the Job line item from the Labor Time Sheet.



2. Select the Cost Code. **Note:** Multiple Cost Codes can be added.
3. Select Add Selected Items.

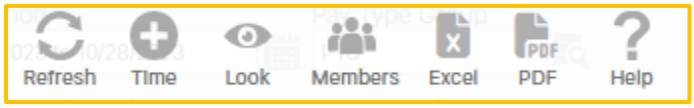


4. Select New Batch.
5. Enter the Job and/or Cost Code.
6. Select Add Selected Items.
7. Select New Batch.
8. Continue this process until all Jobs and/or Cost Codes have been entered.
9. Select Add to Time Sheet. The information will be added to the Labor Time Sheet.

Note: This feature is also accessible from the Add Jobs/Cost Code to Time Sheet at the bottom of the Labor Time Sheet. The difference between the two methods is using the Add Job Cost Code Codes icon next to the Job on the Labor Time Sheet, pre-loads the Job for the user and the Add Jobs/Cost Code at the bottom of the Labor Time Sheet does not.

Tools on the Labor Time Sheet Page

When More… at the top of the Labor Time Sheet is selected, a variety of other tools appear for use on the Labor Time Sheet Page.



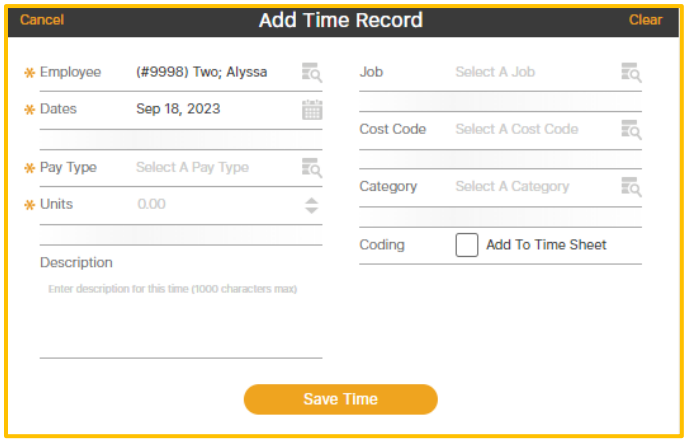
Refresh: The Refresh icon will refresh the time sheet data.

Time: The Time icon allows the user to add a time record.

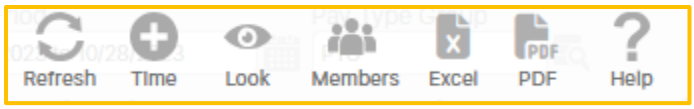
To Add Time Using the Time icon:

Note: This provides an alternative method to enter time instead of keying it directly onto the Labor Time Sheet Page.

1. Select More… for the top of the Labor Time Sheet.
2. Select the Time icon from the Labor Time Sheet Page.



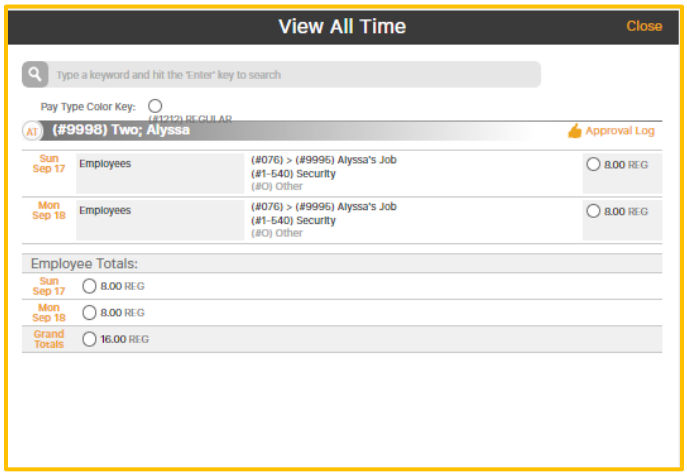
3. Enter the Employee's name.
4. Enter the Date.
5. Enter the Pay Type.
6. Enter the Units (of time).
7. Enter any other information needed (a Description, Job, Cost Code, Certification Class).
8. Check the Coding box to save the time Units and add the coding to the Labor Time Sheet for later use.
9. Select Save Time.
10. The time will be displayed on the Labor Time Sheet.



Look: The Look icon allows the user to view <u>all</u> time entered for the employee or employees (if using the Daily view).

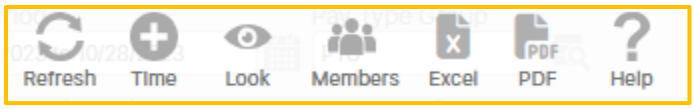
To View All Time:

1. Select More… for the top of the Labor Time Sheet.
2. Select the Look icon.

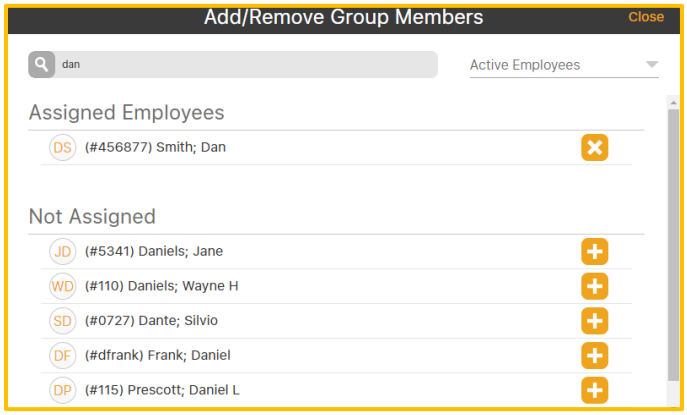


3. Select Close.

Note: The Approval Log link will allow the user to see where the time is in the Workflow based on the Approval Path. See Approval Log.



Members: The Members icon allows the user to add and remove members from a Payroll Group.

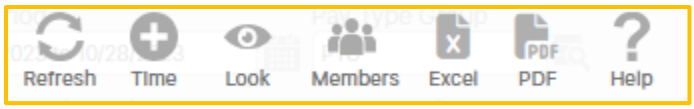


To Add a Member to a Payroll Group:

1. Select More… for the top of the Labor Time Sheet.
2. Select the Members icon.
3. Search for the member to add in the Search field.
4. Select the name under the Not Assigned section.
5. Select the Add icon.
6. Select Close.

To Delete Members from a Payroll Group:

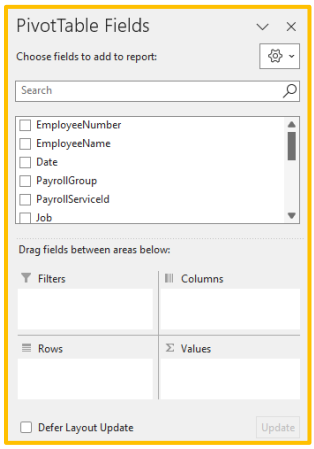
1. Select More… for the top of the Labor Time Sheet.
2. Select the Members icon.
3. Search for the member to delete in the Search field.
4. Select the name under the Assigned Employees section.
5. Select the Delete icon.
6. Select Close.



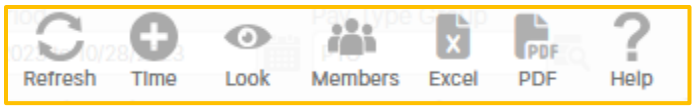
Excel: The Excel icon creates an Excel spreadsheet with the employee's time. It must be downloaded to view. A Pivot Table may be inserted into the Excel spreadsheet to create customized reports for easy review of time. **Use Cases:** Used to create customized reports requested by others or to quickly review time.

To Create a Pivot Table within the Excel Spreadsheet:

1. Select More… for the top of the Labor Time Sheet.
2. Select the Excel icon.
3. The spreadsheet will be downloaded and can be found in the Downloads folder on the user's computer.
4. Highlight the data in the Excel spreadsheet.
5. Select Insert>Pivot Table in Excel.
6. Choose New Worksheet.
7. Select Ok.
8. Check the data to be placed in the customized report in Pivot Table Fields, such as Employee Number, Employee Name, Payroll Group, and other data.

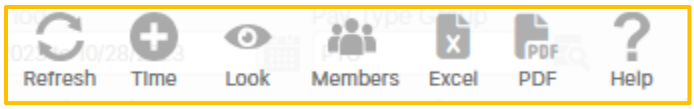


9. Drag the items (for instance, Employee Number) to the Columns section (most typically used) or Rows section.
10. Select File>Save as, name the file.
11. Select Save.
12. Print or Share the report as needed.



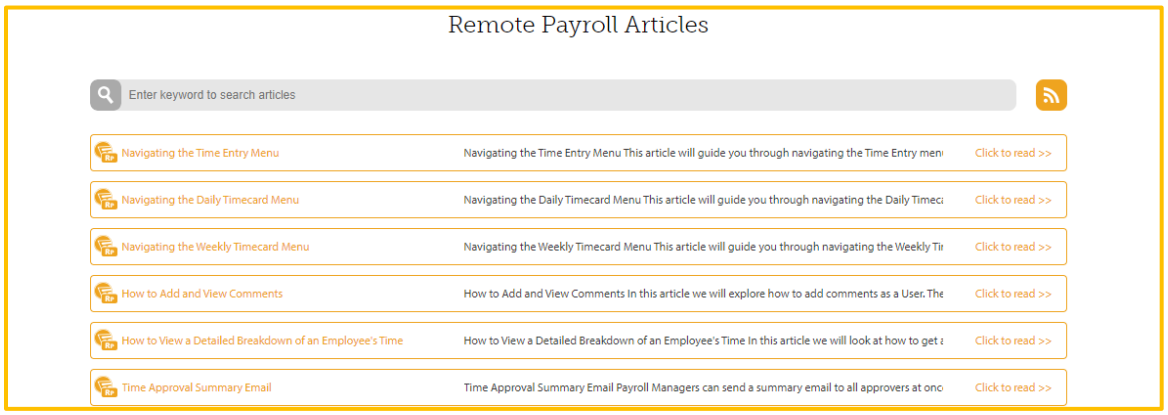
PDF: The PDF icon creates a physical time sheet <u>each</u> employee. It, too, must be downloaded to view and can be found in the user's Download folder.

1. Select More… for the top of the Labor Time Sheet.
2. Select the PDF icon.
3. Check the Downloads folder for the report.



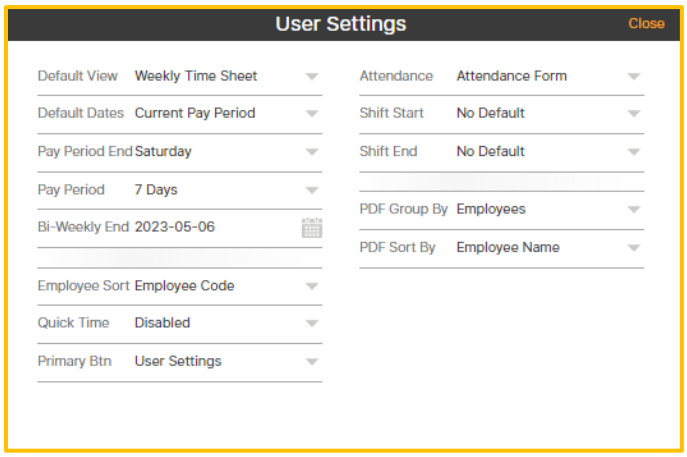
Help: The Help icon takes the user to related Knowledge Base articles.

1. Select More… for the top of the Labor Time Sheet.
2. Select the Help icon.



3. Select the article.
4. Close the associated tabs when done.

User Settings: The User Settings icon allows the user to set settings specific to the individual user's preference and needs.



Preferences include:

- The Default View (weekly or daily). This setting will carry over between the Time Entry Record and the Labor Time Sheet for the user.
- Pay Period Dates (current or previous)
- Pay Period End Date (day of week)
- The number of Pay Period days (7 or 14)
- A Bi-weekly End Date
- Employee Sort (name or code)
- Quick Time (disabled, click and hold or always).
    - **Click and hold** will display the Add Time Record Page when the user clicks and holds on the time boxes on the Labor Time Sheet, for a quick time entry. If there are unwanted hours keyed on the Labor Time Sheet, click and hold allows them to be changed without backspacing and deleting.
    - **Disabled** means the user cannot click and hold. The Add Time Record Page does not display.
    - **Always** will display the Add Time Record Page all the time during time entry.
- Primary Button (allows the user to set an additional tool outside More…on the top of the page on the Time Sheet (RP>Track Labor Time>Time Sheet)).
- Attendance (form or punch)

- Shift Start and End times
- For PDF reports list by (group by Employee, Jobs, or Payroll Group)
- Sort PDF data by (Employee Name or Number or by Job Name or Job Number).

Additional Tools on the Labor Time Sheet

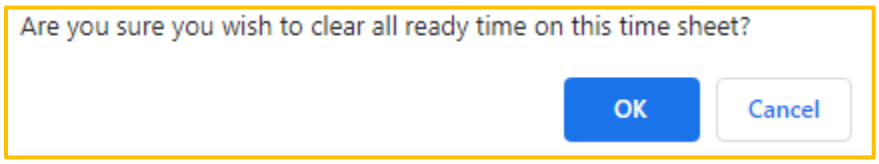
More…adjacent to the days of the week (on the Weekly view) or the employee names (on the Daily view) allows the user to access even more tools. These tools are available to both the Payroll Manager and the Field user when using the website.

Note: The Signature icon is not present on the Daily view, as the Daily view represents time for more than one employee.

Clear: The Clear icon will clear all time entered on the Labor Time Sheet.

To Clear All Time:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Clear icon.



3. When OK is selected, all time will be cleared from the Labor Time Sheet.

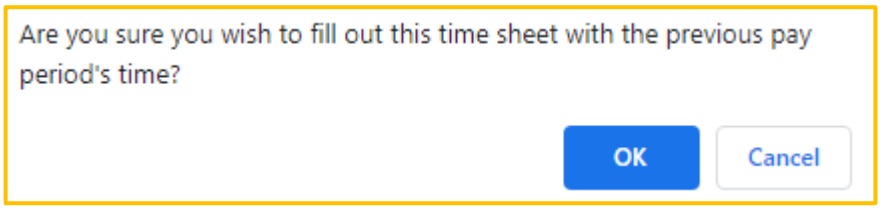
Auto-Fill: The Auto-Fill

icon will populate the Labor Time Sheet, with the previous pay period's time.

To-Fill the Labor Time Sheet with the Previous Pay Period's Time:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Auto-Fill

icon.

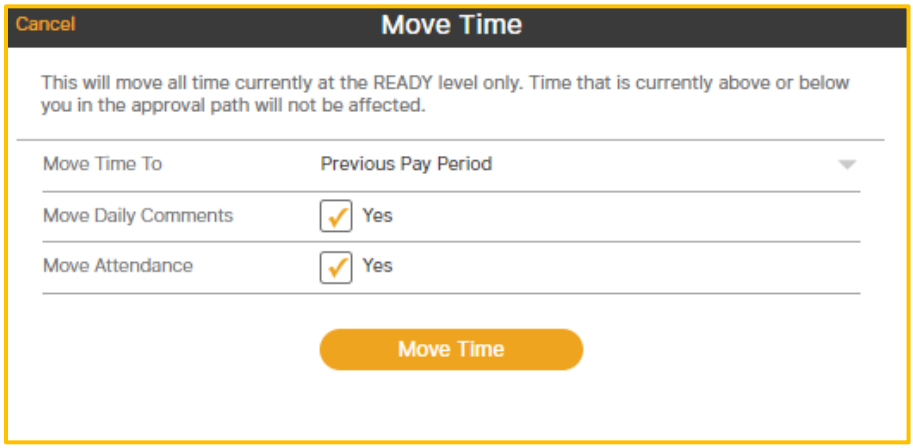


3. When OK is selected, the previous pay period's time will fill the Labor Time Sheet.

Move: The Move icon will move time to either a previous or future pay period.

To Move Time to a Previous or the Following Pay Period:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Move Time icon.

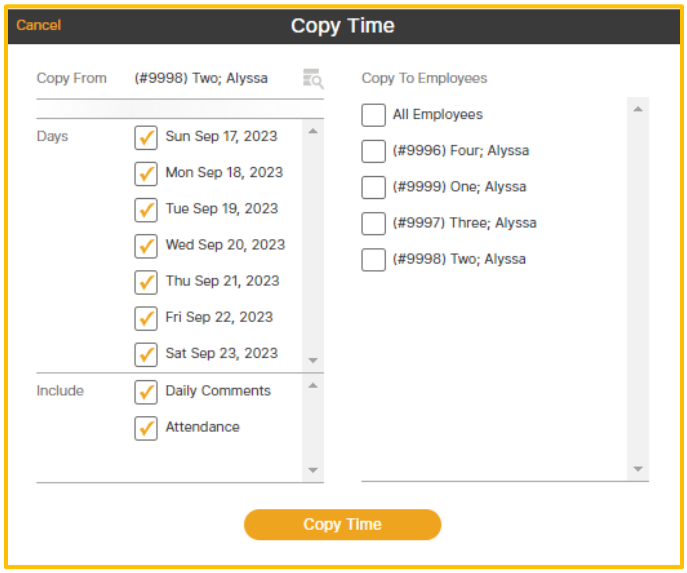


3. Select the Period to move the time to (Previous or Following Pay Period) from the Picklist.
4. Check if Daily Comments or Attendance should be moved.
5. Select Move Time.

Copy: The Copy icon allows the Payroll Manager to copy time entries from one employee to other employees.

To Copy Time from One Employee to Other Employees:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Copy Time icon.

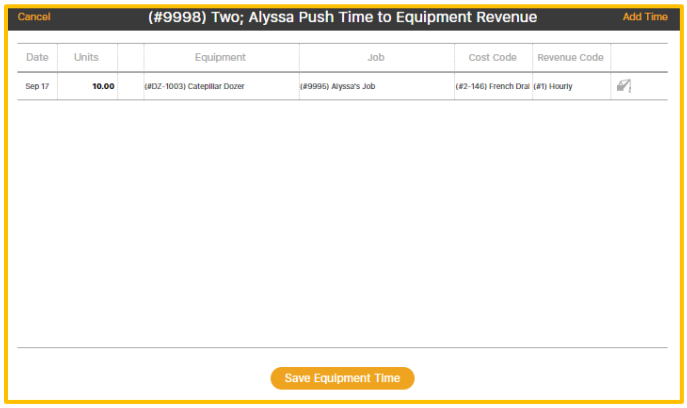


3. Select the Employee from whom the time will be copied in the Copy From field.
4. Check the Days to be copied.
5. Select if Daily Comments and Attendance will be copied.
6. Choose the Employees to copy the time to in the Copy to Employees section. **Note:** All Employees is an option at the top of the Copy To Employees column.
7. Select Copy Time.

Equipment Revenue: The Equipment Revenue icon allows time to be added to Equipment Revenue. By default, this will copy any of the user's existing labor time with the option to adjust units, codes, and categories. **Note:** This feature is used to add time against a piece of equipment, not to add employee time to a piece of equipment.

To Add Time to Equipment Revenue:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Equipment Revenue icon.



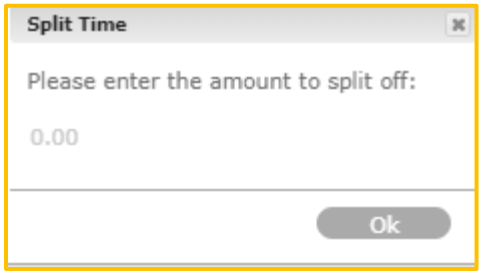
3. Select Add Time.
4. Select a Date from the Add Time to Distribution Page.
5. Select Okay.
6. Enter the time (units).
7. Select the Equipment, Job, Cost Code and Cost or Revenue Code.
8. Select Save Equipment Time.
9. Select Save Time
10. Select Close.

Note: The Add Time feature in the upper right corner allows the user to continue to add time without exiting the page.

Time may be split off using the Split icon. **Use Case:** This may be used when splitting equipment time between Jobs.

To Split Time on Equipment:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Equipment Revenue icon.
3. Select the Split icon



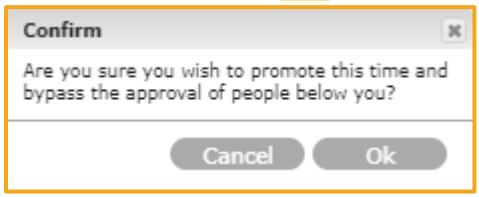
4. Enter the amount to split off and select Ok.
5. The Split Time will display as two entries.
6. Select the Equipment, Job, and Cost Code.
7. Select Save Equipment Time.
8. Select Close.

The Promote, Deny and Reclaim icons are used primarily during the Workflow step of the Remote Payroll process. During the Workflow step, the Payroll Manager primarily works from the Labor Time Approval Page (RP>Track Labor Time>Time Approval). However, time can be promoted, denied, and reclaimed from the Labor Time Sheet, as well. From the Labor Time Sheet, all time is promoted, denied, or reclaimed. While on the Labor Time Approval Page, select time can be promoted, denied, or reclaimed specific to the employee. See Workflow.

Promote: The Promote icon allows the user to promote all unapproved time to the next level in the Approval Path. This is used during the Workflow step, as time progresses through the Approval Path.

To Promote All Unapproved Time:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Promote icon.

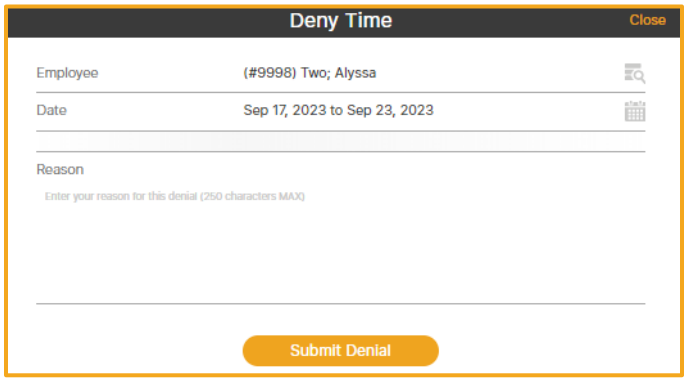


3. Select Ok.
4. This will promote the time and bypass the approval of those below the user logged in and will bring the time to their level to modify and approve.
5. Once promoted, time will still need approval.

Deny: The Deny icon allows the user to deny all-ready time from the Labor Time Sheet. This is used during the Workflow step, as time progresses through the Approval Path. See Workflow.

To Deny All Ready Time:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Deny icon.



3. Select the Employee.
4. Select the Pay Period Date
5. Enter a Reason for denial (required).
6. Select Submit Denial.
7. The status will change to Promote on the Labor Time Sheet. The Payroll Manager will no longer have access to modify the hours, since the time is no longer at the Payroll Manager level in the Workflow.

Note: This process will only deny time back down one level in the Approval Path. This process will need to be repeated by others in the Approval Path until it reaches the desired level.

Reclaim: The Reclaim icon will reclaim <u>all</u> immediately approved time. This action will change the status from Reclaim to back to ready for approval (Approve status). This is used during the Workflow step, as time progresses through the Approval Path. See Workflow.

To Reclaim <u>All</u> Approved Time:

1. Select More… adjacent to the days of the week on the Weekly view or the employee names on the Daily view.
2. Select the Reclaim icon.
3. Select Ok for Approval Confirmation.

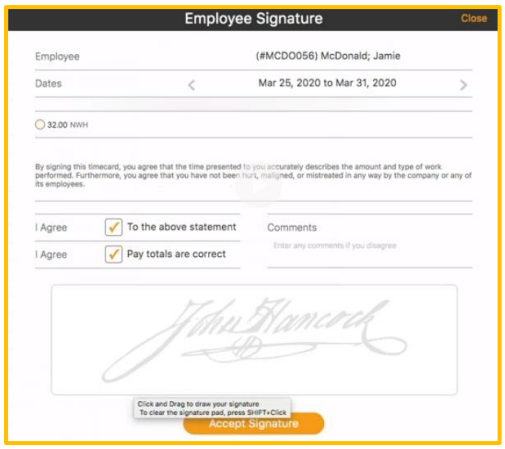
Note: Once time has been reviewed by the level above, the Reclaim icon will no longer work, and the time will need to be denied.

Sign: The Signature icon provides the space for the employee's signature.

To Sign a Labor Time Sheet:

Note: The Signature icon is not present on the Daily view, as it represents time for more than one employee.

1. Select More… adjacent to the days of the week on the Weekly view.
2. Select the Signature icon from either the Labor Time Sheet Page or the Labor Time Approval Page.



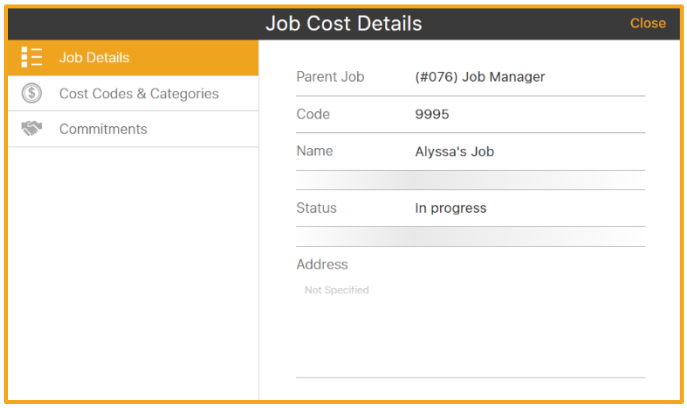
3. Check the boxes.
4. Add any comments, if applicable.
5. Place the cursor in the signature box.
6. To clear the signature, select Shift + Click.
7. Select Accept Signature.

Note: It is recommended that the entire week is filled out prior to adding a signature, as signatures cannot be re-signed or deleted.

Job Explorer: Allows the user to conduct a detailed search for Job Codes, including active and inactive Job Codes. This icon displays adjacent to the Job.

To Search Job Codes:

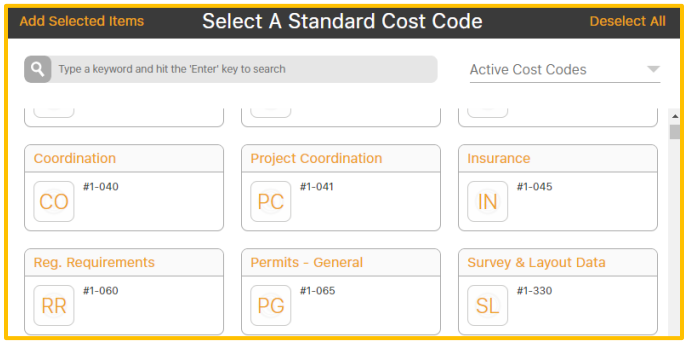
1. Select the Job Explorer icon.
2. Use the Search Field to find a Job.
3. Filter by Active, Inactive and All Jobs.
4. The Job Details icon allows for a further search.



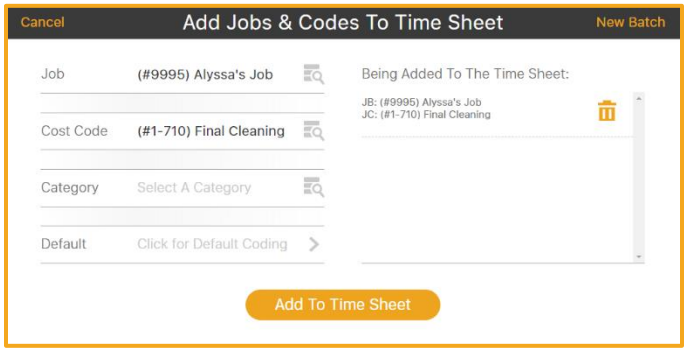
Add More Cost Codes: Allows the user to add additional Cost Codes to the Labor Time Sheet.

To Add More Cost Codes:

1. Select the Add More Cost Codes icon on the Job line item.



2. Select the Cost Code. **Note:** Multiple Cost Codes can be added.
3. Select Add Selected Items.

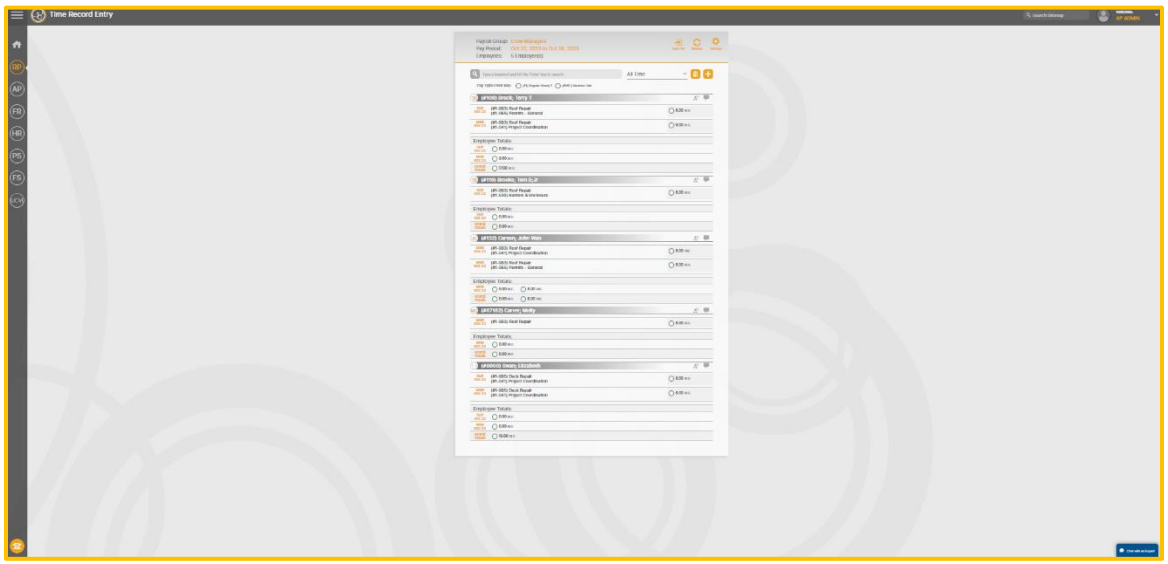


4. Select Add to Time Sheet. Or select the Delete icon to delete the code from the Labor Time Sheet. When Add to Time Sheet is selected the Job and Cost Code will display on the Labor Time Sheet. See also To Add Multiple Jobs and Cost Codes to a Labor Time Sheet Using the New Batch Feature.

Time Record Entry

Navigation: RP>Track Labor Time>Time Record Entry

The Time Record Entry Page provides an alternative means for entering time. It displays in a list view rather than a spreadsheet view. **Use Case:** The Time Record Entry is particularly useful when entering batch time entry for multiple employees and/or days.



Time will display by Payroll Group and Pay Period. The number of employees in a Payroll Group will also be displayed with time entered for each by Pay Type, Job, and Cost Code (as logged).

Tools on Time Record Entry Page

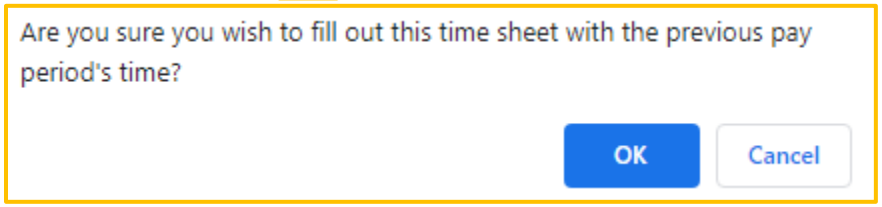
Auto-Fill: The Auto-Fill

icon is used for ease and speedy time entry, the auto-fill feature populates the Time Record Entry with the previous pay period's time.

To Use the Auto-Fill Feature:

1. Select the Auto-Fill

icon.

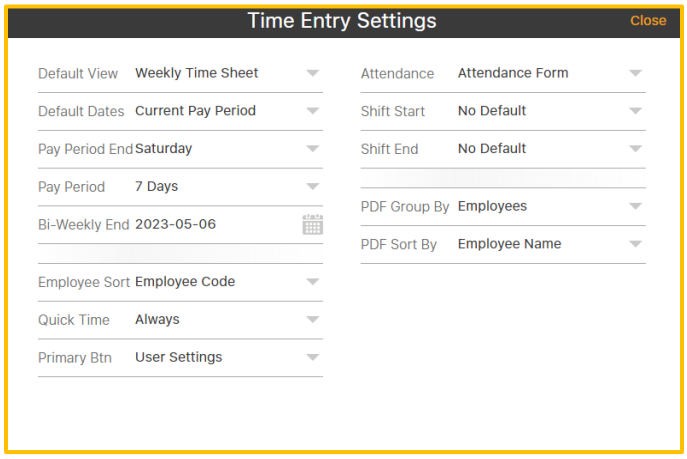


2. Select OK. When OK is selected, the previous pay period's time will fill the Labor Time Record Entry Sheet with the previous pay period's time.

Refresh: The Refresh icon will refresh the time sheet data.

User Settings: The User Settings

icon allows for the user to customize their personal preferences regarding Time Entry. This is particularly useful to the Payroll Manager, who works in the previous pay period, while others are working in the current pay period, for instance. **Note:** These settings impact both the Labor Time Sheet and the Labor Time Approval Page. These same settings can also be set from the Labor Time Sheet.

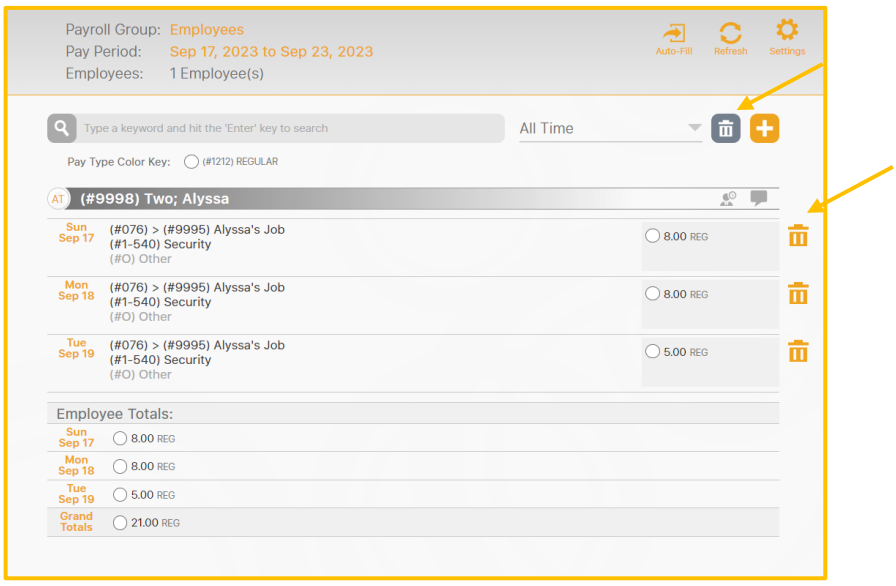


Preferences include:

- The Default View (weekly or daily). This setting will carry over between the Time Entry Record and the Labor Time Sheet for the user.
- Pay Period Dates (current or previous)
- Pay Period End Date (day of week)
- The number of Pay Period days (7 or 14)
- A Bi-weekly End Date
- Employee Sort (name or code)
- Quick Time (disabled, click and hold or always).
    - **Click and hold** will display the Add Time Record Page when the user clicks and holds on the time boxes on the Labor Time Sheet, for a quick time entry. If there are unwanted hours keyed on the Labor Time Sheet, click and hold allows them to be changed without backspacing and deleting.
    - **Disabled** means the user cannot click and hold. The Add Time Record Page does not display.
    - **Always** will display the Add Time Record Page all the time during time entry.
- Primary Button (allows an additional icon outside of More...on the top of the page on the Time Sheet (RP>Track Labor Time>Time Sheet))
- Attendance (form or punch)
- Shift Start and End times
- For PDF reports list by (group by Employee, Jobs, or Payroll Group)
- Sort PDF data by (Employee Name or Number or by Job Name or Job Number).

To Delete Time from the Time Record Entry Page:

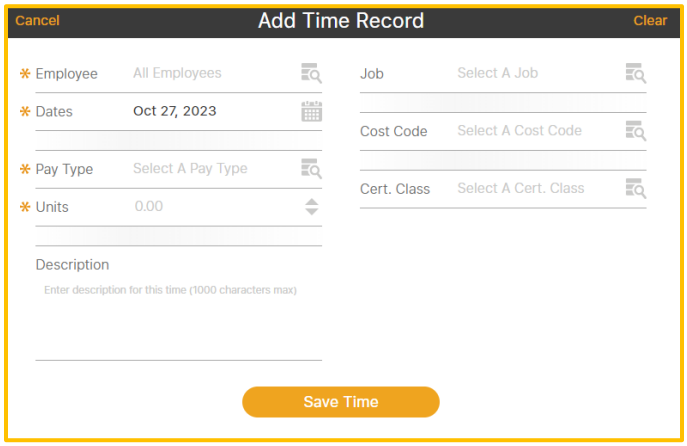
1. Select the Delete icon. This enables Delete icons next to each line of time.



2. Select the Delete icon for each line item to delete. This will remove the time.

To Add Time via the Time Record Entry Page:

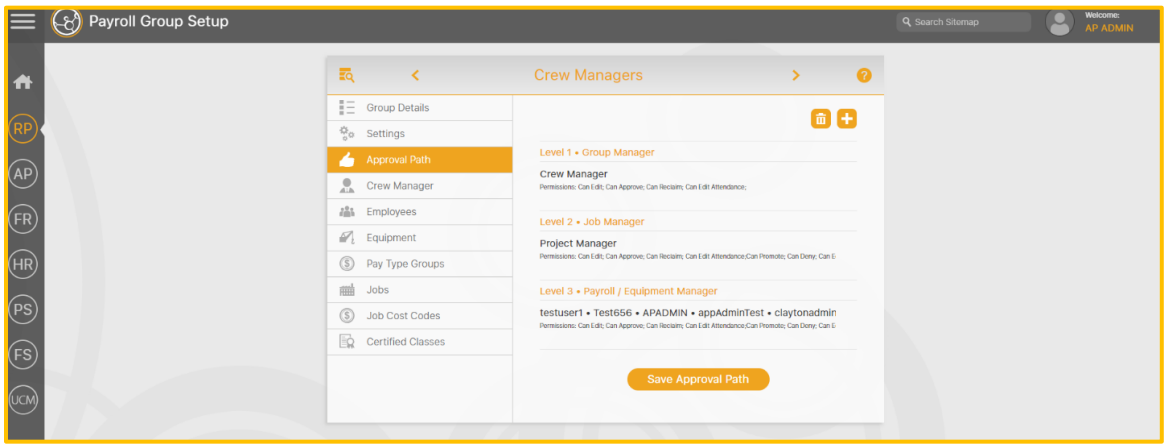
1. Select the Add + icon.



2. Enter the Employee Name or use the search tool. Add Selected Items.
3. Enter the Dates and select Add Selected Items (note that multiple days may be selected).
4. Select the Pay Type.
5. Enter the Units of time.
6. Enter the Job, using the search tool.
7. Enter the Cost Code.
8. Enter the Certification Class, Shifts, Union information, G.L. Account and Category, if applicable.
9. Enter a Description.
10. Select Save Time.
11. Select Close once the time is saved. A message will appear when the time has been successfully saved.

Step 2: Workflow (Approval Path)

After time is entered, the time follows the Approval Path specified for the Payroll Group (RP>Payroll Users and Groups>Payroll Groups>specific Payroll Group>Approval Path tab). **Note:** The Approval Paths are set up by employee level, group manager, or job manager roles. Likewise, the Approval Path is structured by levels. These are customizable to meet the preferences and needs of the construction company.



During the Workflow step of the payroll process, Payroll Managers primarily work from the Time Approval Page (RP>Track Labor Time>Time Approval) to review and approve time prior to exporting it into the accounting system. Changes can be made to time by the Payroll Manager on the Labor Time Sheet. If the Payroll Manager opts not to make changes themselves, they may deny time to a lower level. See To Deny Time from the Labor Time Approval Page.

The Labor Time Approval Page

Navigation: RP>Track Labor Time>Time Approval

When working from the webpage on a desktop, non-Payroll Managers that are a part of the Approval Path will also work from RP>Track Labor Time>Time Approval Page. If a user or their job role is not listed in the Approval Path of a Payroll Group (RP>Payroll Users and Groups>Payroll Groups>specific Payroll Group>Approval Path tab), access to time is not provided on the Labor Time Approval Page.

From the Labor Time Approval Page, Payroll Managers can:

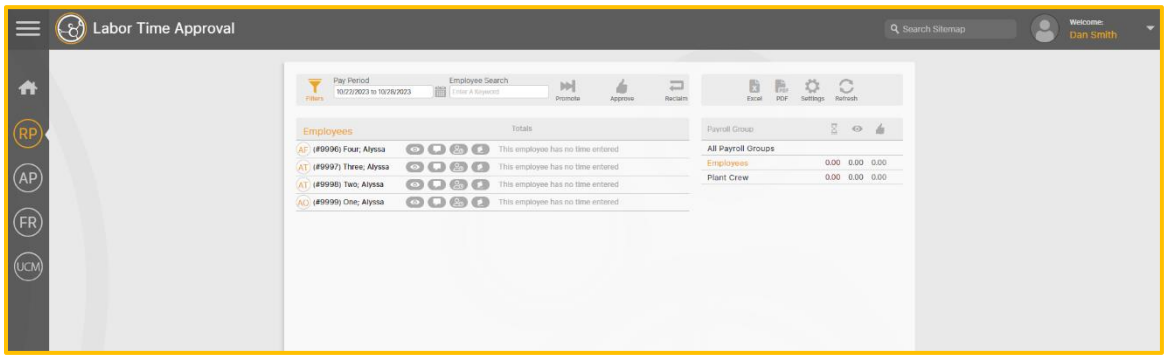
- Promote Time
- Approve Time
- Reclaim Time
- Create Excel spreadsheets for easy time reconciliation
- Create PDFs for individual time reconciliation
- Lock Time
- Export Time to the accounting system using the Export icon
- Payroll Managers are usually the last to approve time (as structured in the Approval Path).

From the Labor Time Approval Page, non-Payroll Managers (such as Foreman and Supervisors) can:

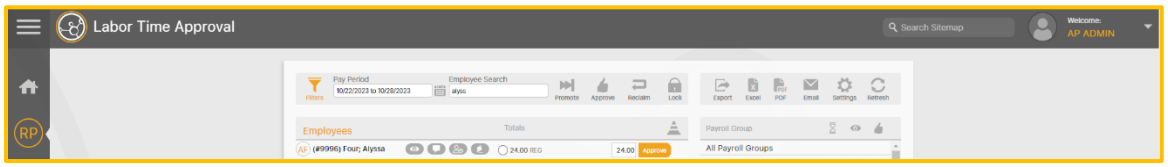
- Promote Time
- Approve Time
- Reclaim Time
- Create Excel spreadsheets for easy time reconciliation
- Create PDFs for individual time reconciliation

Note: Non-payroll managers cannot lock or export time. The key differences between users that have access to the Labor Time Approval Page and Payroll Managers are that the Payroll Manager 1) should be the last to approve time (at highest level in the Approval Path), 2) can lock time and 3) export time. Notice these differences in the Labor Time Approval Pages that follow.

The Labor Time Approval Page for a non-Payroll Manager:



The Labor Time Approval Page for a Payroll Manager:

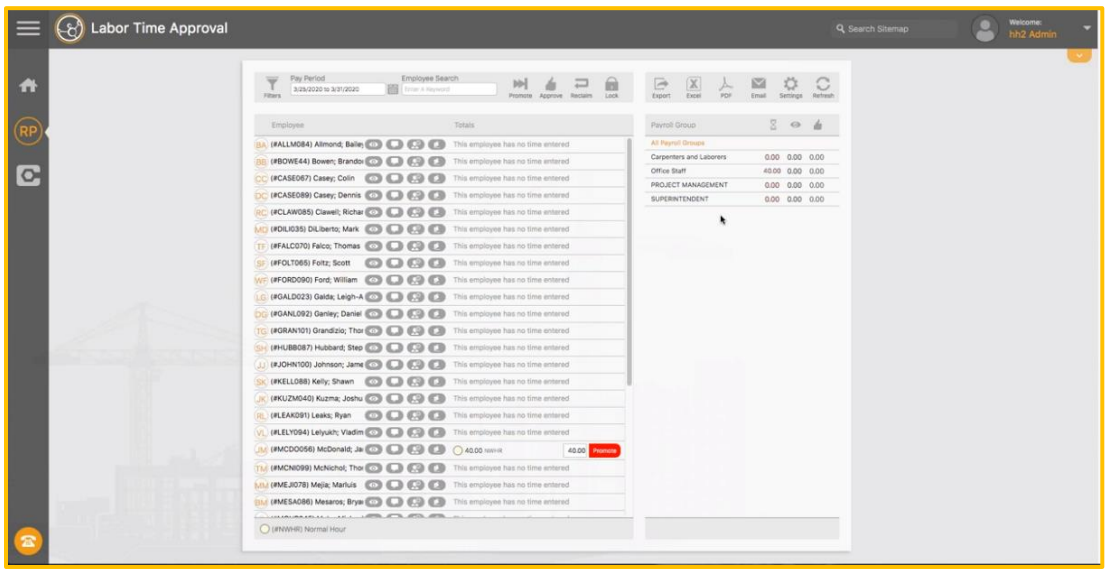


Note: If there is more than one person in a job role at a level in the Approval Path, once one individual approves time, the others at that level cannot approve time. Selecting the Approve icon to approve time is on a first come, first serve basis.

Note: Payroll Managers will spend most of their time on the Labor Time Approval Page. The Time Approval Page provides the Payroll Manager with a location to view employee time, check their time totals and approve time prior to export.

More About the Labor Time Approval Page

Navigation: Home Page>Remote Payroll >Time Approval or RP>Track Time>Time Approval



An employee must be assigned to a Payroll Group to be displayed on the Labor Time Approval Page.

The Labor Time Approval Page allows searches by:

- Filters
- The Pay Periods (defaults to the current Pay Period, but can be modified in Settings)
- The Employee Name
- By Payroll Group (on the right). Payroll Groups are displayed in alphabetical order.

Note: The Payroll Manager can click an employee's name to open the Labor Time Sheet in a new tab, and not lose their place on the Labor Time Approval Page.

Understanding Time Statuses

The Time Approval Status is displayed next to each employee's name on the Labor Time Approval Page.

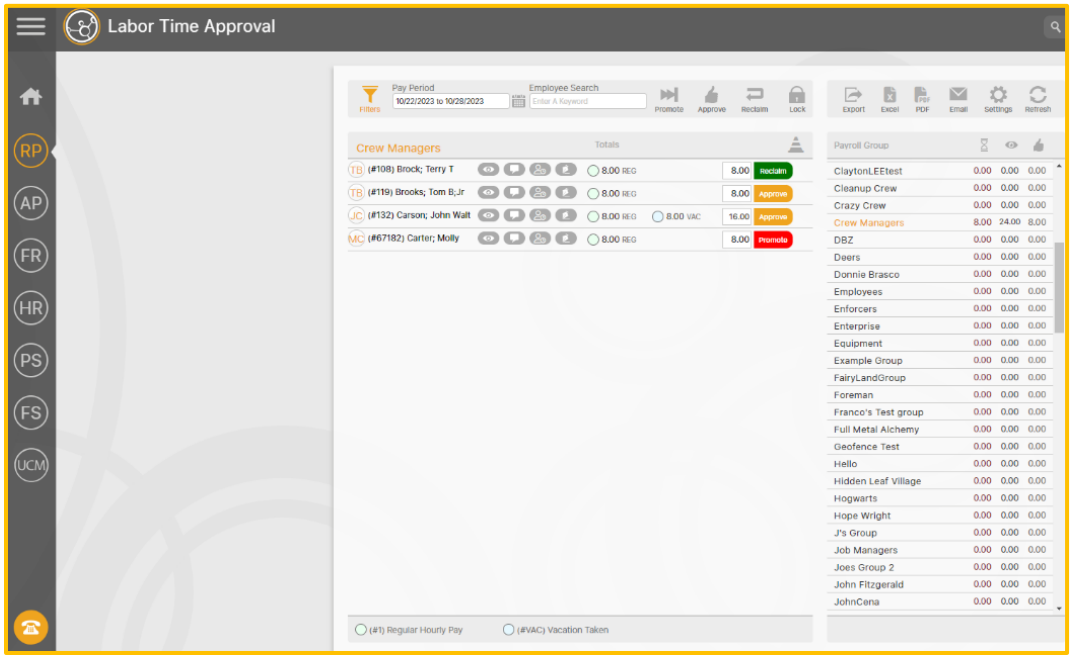
Promote (red): Indicates the time is at a lower level than the of the user in the Workflow. The Payroll Manager is the highest level in the Workflow (as defined by the Approval Path). Promote means persons (the employee or individuals in certain job roles) at lower levels have not yet approved time. The Promote

icon allows the Payroll Manager or others to promote the time to their level for approval. Level 1 in the Workflow does not have the ability to promote. Level 1 must select Approve to move the time to higher levels. Once Promote is selected, the icon will change to Approve. To determine who (which level) the time is held at, the Payroll Manager can view the Approval Log. See Approval Log.

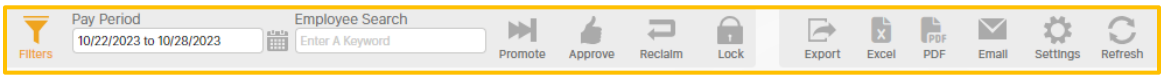
Approve (gold): Indicates the time has been approved by users at a lower level in the Workflow and ready to approve at the Payroll Manager level. Approve indicates the time is at the user's level. Once Approve is selected, the icon will change to Reclaim.

Reclaim (green): Allows the user to pull the time back to their level in the Workflow after approving it for further corrections, if necessary. The Payroll Manager can reclaim at any stage of the Workflow up until the time of Export. However, for others in the Workflow, Reclaim will only work until the next level person in the Workflow accesses the time.

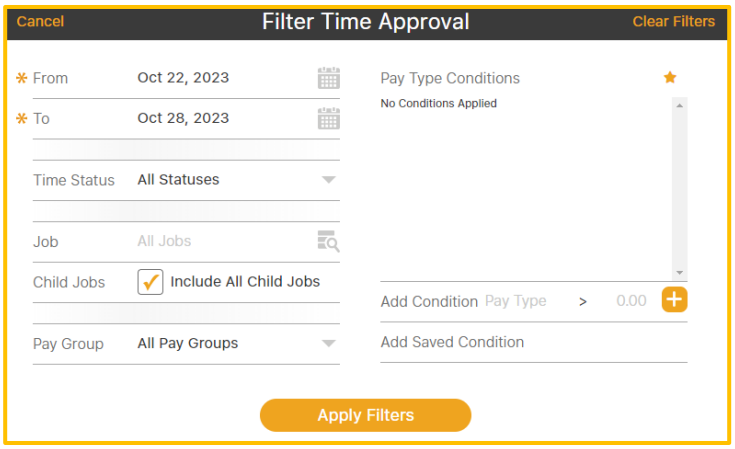
Exported (blue): Indicates the time has been exported to the accounting system.



Tools on the Labor Time Approval Page

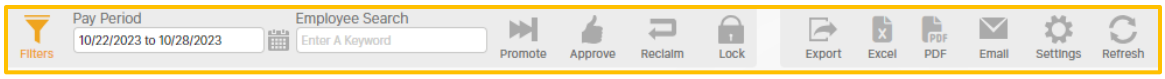


Filter: The Filter icon allows the user to filter by Date, Time Status, Job, Child Jobs, Pay Groups and Pay Type Conditions (such as equal to, greater than or less than an amount).



To Use the Filter:

1. Select the Filters icon.
2. Enter the data by which to filter. For conditions, select the Pay Type, the inequality sign, and enter the amount. Select the Add + icon.
3. Select Apply Filters.
4. The data selected will be displayed on the Labor Time Approval Page.



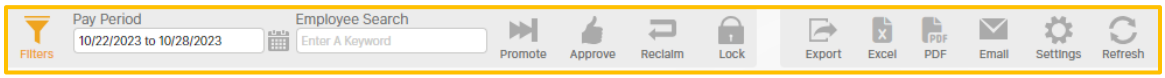
Pay Period: The system defaults to the current pay period. The system allows the user to switch the Pay Period that displays, since most typically the Payroll Manager is processing time during a previous pay period. **Note:** In the User Settings, the user can set their own default week to either the current or previous pay period.

To Select a Pay Period other than the default Pay Period:

1. Select the Calendar icon next to the Pay Period field.

2. From the Select a Pay Period Page, choose the Pay Period.
3. The user can also use the Picklist to select Past or Future Pay Periods.

Employee Search: Allows the user to search by employee name.



On the Labor Time Approval Page, time may be managed individually, or by batch (all time). The Promote, Approve and Reclaim icons at the top of the Labor Time Approval Page, manage <u>all</u> time on the Labor Time Approval Page. These functions are also available on the Labor Time Sheet. See Additional Tools on the Labor Time Sheet.

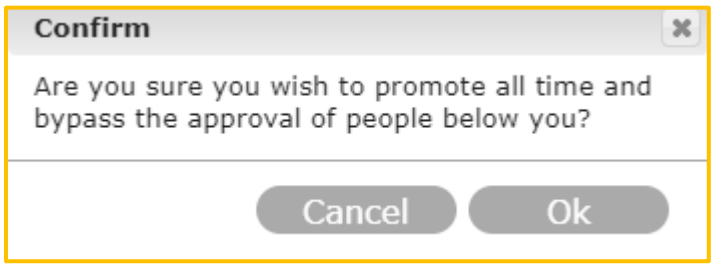
Promote: The Promote

icon at the top of the page will promote <u>all</u> time on the Labor Time Approval Page to the Approve status, as it functions as a batch feature. Otherwise, time can be promoted to the Approve status for each line item simply by selecting Promote adjacent to the employee's time. The job role (person) in Level 1 of the Workflow does not have the ability to Promote time.

To Promote <u>All</u> Time on the Labor Time Approval Page:

1. Select the Promote

icon.



2. Select Ok.
3. All time will be promoted to the Approve status and bypass those in lower Levels.

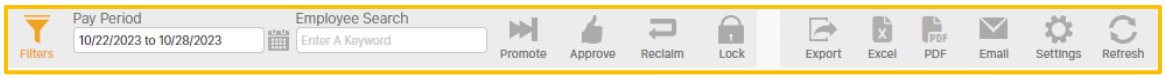
Approve: The Approve

icon at the top of the page will automatically approve <u>all</u> time on the Labor Time Approval Page, acting as a batch feature.

To Approve <u>All</u> Ready Time on the Labor Time Approval Page:

1. Select the Approve

icon.
2. This will change the Approve status to Reclaim status.



Reclaim: The Reclaim

icon at the top of the page will reclaim <u>all</u> time on the Labor Time Approval Page. This will change all time that has already been approved time in Reclaim status, back to Approved status, meaning it requires approval once again.

To Reclaim All Approved Time on the Labor Approval Page:

1. Select the Reclaim

icon.
2. This will change the Reclaim status back to Approve, meaning it requires action to be approved once again.

Lock: The Lock

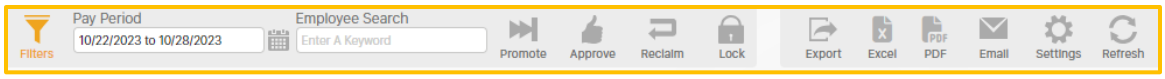
icon at the top of the page will lock the Pay Period to prevent time from being entered and approved after a certain date. This is optional. **Use Case:** It is recommended that after exporting time to the accounting system the Pay Period should be locked. This alleviates errors and ensures employees enter time in the correct Pay Period.

To Lock a Pay Period:

1. Select the Lock

icon.
2. This will lock the Pay Period so no additional time may be re-entered.

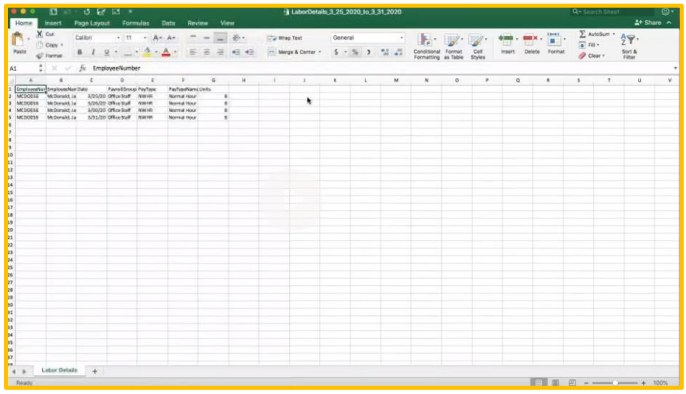
Export: The Export
icon at the top of the page will export all time approved by the highest level in the Approval path (and in the Reclaim status) to the accounting system. See Exporting Time to the Accounting System.



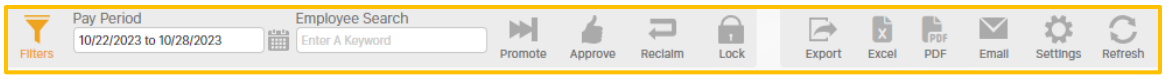
Excel: The Excel icon will create a report based on the Pay Period selected, as well as which employees have time coded. If the report is blank that means, there was not time coded to a filter selected. This provides a convenient way for the Payroll Manager to review time quickly and efficiently.

To Create an Excel Report:

1. Select the Excel icon.
2. Look in Downloads folder for the file.



3. The Excel spreadsheet allows the user to view all employees on one report. See also To Create a Pivot Table within the Excel Spreadsheet for a helpful tip for creating customized report for time review.

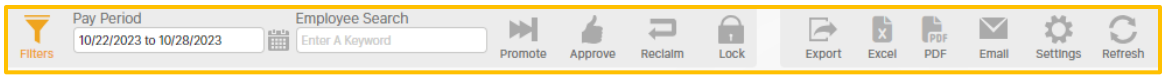


PDF: The PDF icon will create a PDF report based on the Pay Period selected, as well as which employees have time coded. If the report is blank, there was not time coded to the filter selected.

To Create a PDF:

1. Select the PDF icon.
2. Look in the Downloads folder for the file.

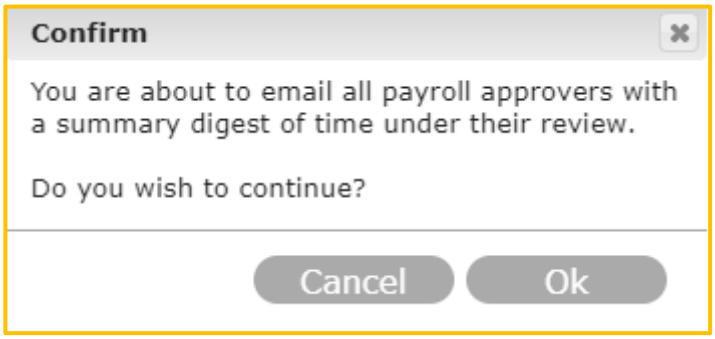
3. This action creates a separate timesheet for each employee selected on a separate page.



Email: The Email icon allows the user to send an email to <u>all</u> payroll approvers, with a summary digest, of time under their review.

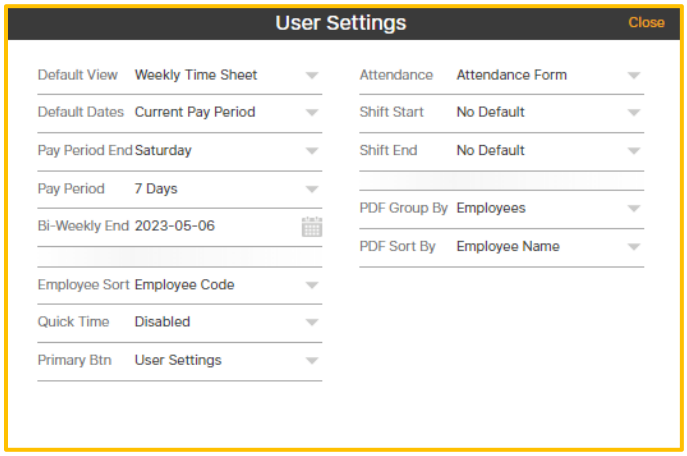
To Send the Summary of Labor Time to all Payroll Approvers Under Their Review:

1. Select the Email icon.



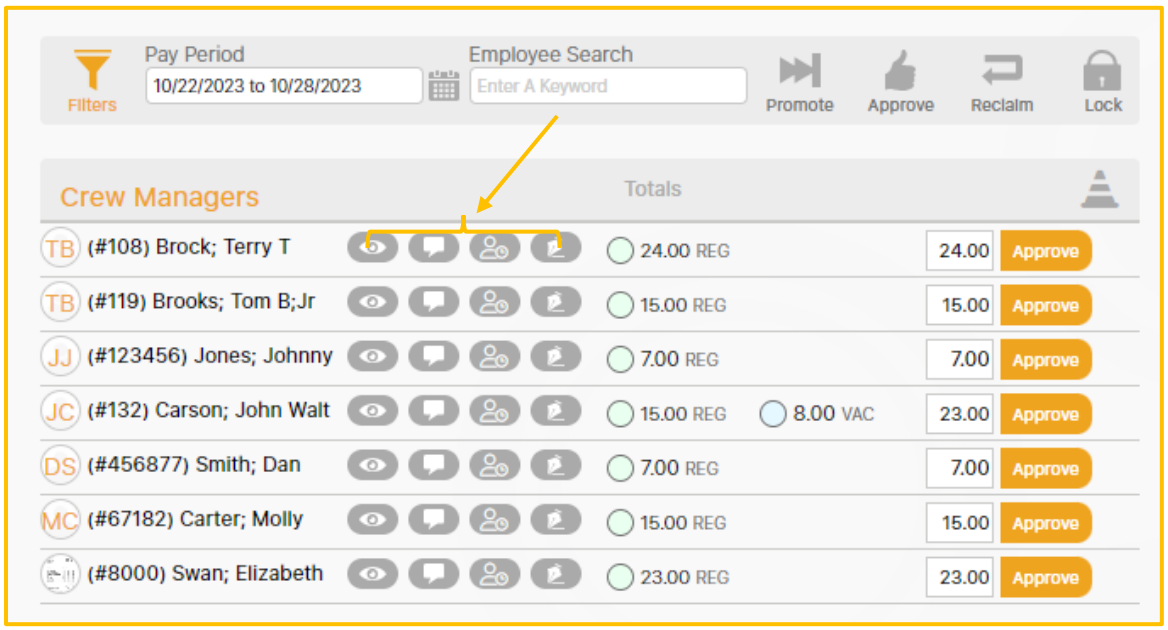
2. Select Ok to email all payroll approvers a summary of time under their review.

Settings: The Settings icon allows the user to customize their own settings, according to user preference. These are the same settings seen on both the Labor Time Sheet and Time Record Entry. See User Settings.

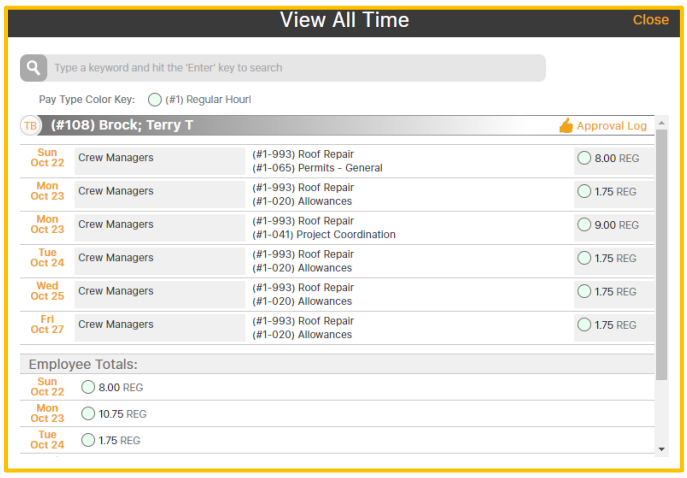


Refresh: The Refresh icon will refresh the Labor Time Approval Page.

Tools in the Center of the Labor Time Approval Page



Quick View: The Quick View icon next to the employee's name allows the Payroll Manager to view each employee's time. Click the icon to view the time.



The View All Time Page allows the Payroll Manager to view totals for time. If a line item is selected from the View All Time Page, it takes the user to the Labor Time Sheet (RP>Track Labor Time>Time Sheet) for easy access to the Labor Time Sheet.

Note: Any errors found on the View All Time Page will need to be corrected on the Labor Time Sheet.

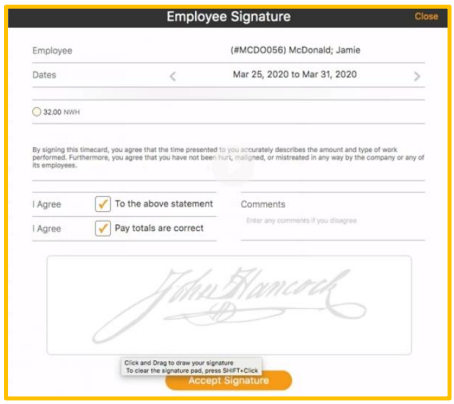
Comments: When anyone makes a comment using the daily comment on the Labor Time Sheet (RP>Track Labor Time>Time Sheet), it can be viewed not only from the Labor Time Sheet, but also on the Time Approval Page. The Comment icon will be indicated in color to inform the user that a comment is present. The comment can be viewed by clicking on the Comments icon on the Labor Time Approval Page.

Attendance: The Attendance icon is used with Punch Clock feature and allows the user to gain access to the time clock punch information, view history and delete punches. See Punches and Attendance.

Signature: The Signature icon provides an opportunity for those with permissions to view an employee's signature on the Labor Time Approval Page. Those with access to the Labor Time Approval Page can add their own signature as well. **Note:** Signatures can also be added on the Time Labor Page (RP>Track Labor Time>Time Sheet>Weekly View).

To Sign a Labor Time Sheet:

1. Select the Signature icon from either the Labor Time Sheet Page or the Labor Time Approval Page.

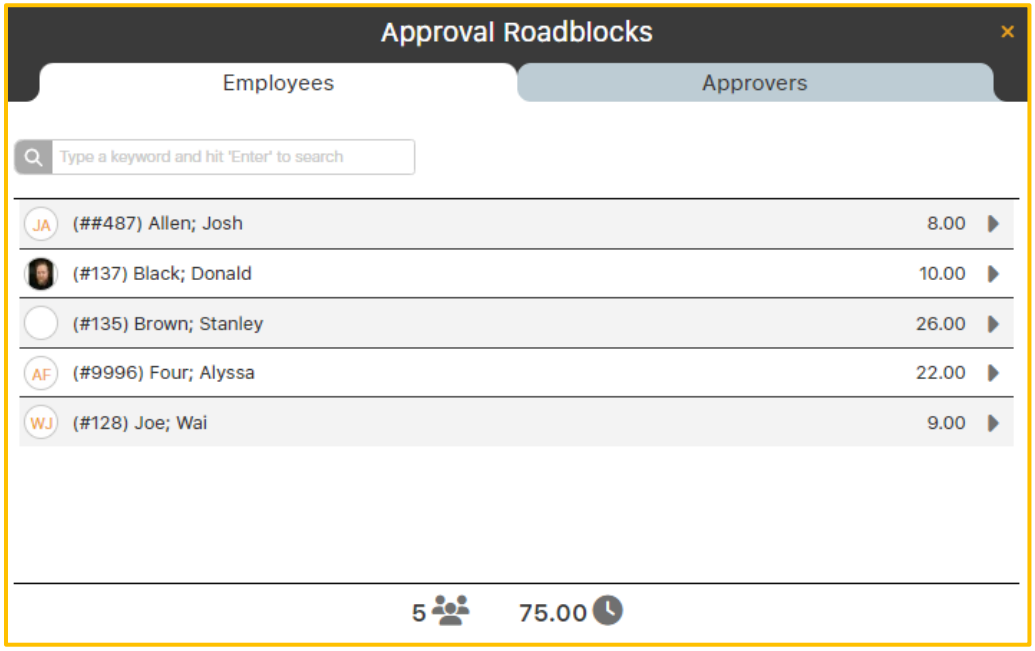


2. Check the boxes.
3. Add any comments.
4. Select Shift +Click.
5. Select Accept Signature.
6. It is recommended that the entire week is filled out prior to adding a signature, as signatures cannot be re-signed or deleted.

Roadblock **icon:** The Roadblock icon displays roadblocks in the Approval Path.

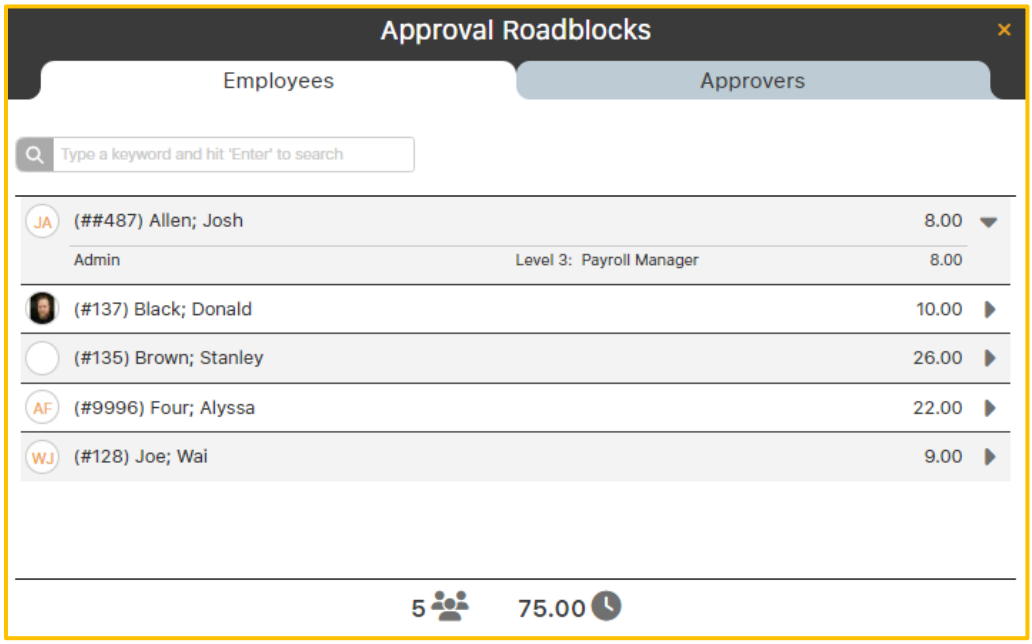
To View Approval Path Roadblocks:

1. Select the Roadblock icon from the Labor Time Approval Page.



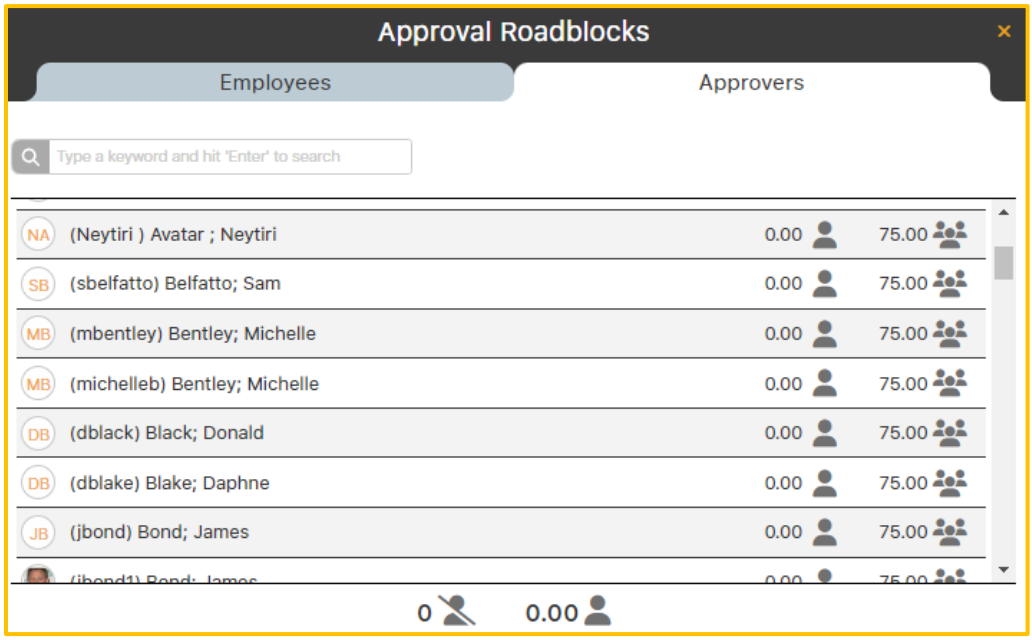
2. Select the Employees tab to view the level at which the time is blocked.

3. Select the carrot to view further details in the dropdown.



The icons at the bottom show the total number of employees needing approval and the total number of units needing approval.

4. Select the Approvers tab to view time. The time in the second column represents only time this user can approve. The time in the third column represents time the user and one or more users can approve. From the Approvers tab, time stuck with no approvers and time waiting on a single approver can be viewed using the icons below, respectively.



Time Approval by Batch or Single Employee

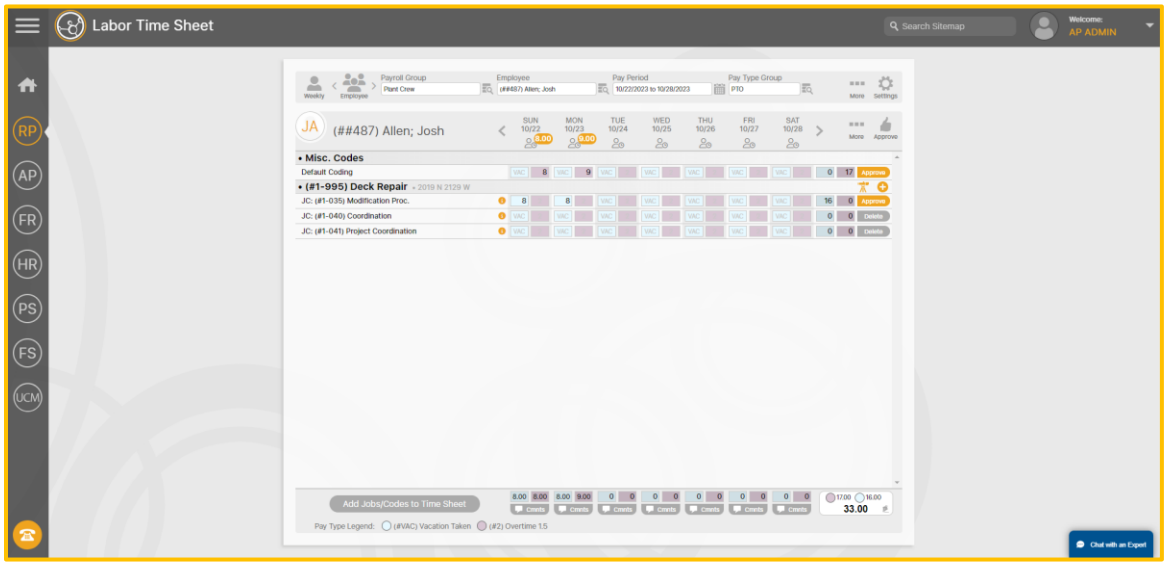
Time can be approved as a batch, or by each employee.

To Approve Time as a Batch from the Labor Time Approval Page:

1. Navigate to the Labor Time Approval Page (RP>Track Labor Time>Time Approval). This action was previously noted in the Tools on the Labor Time Approval Page section of this document.
2. Filter by selecting a Payroll Group or by All Payroll Groups.
3. Select the Approve Icon at the top of the page.
4. This will approve all time for the selected filters. The status will change to Reclaim. For the Payroll Manager, typically the last role in the Approval Path, once all statuses are at Reclaim, the time is ready for export.

To Approve Time for a Single Employee:

1. From the Labor Time Approval Page (RP>Track Labor Time>Time Approval), select a specific employee. This will navigate the user to the Labor Time Sheet for that employee where time may be approved.

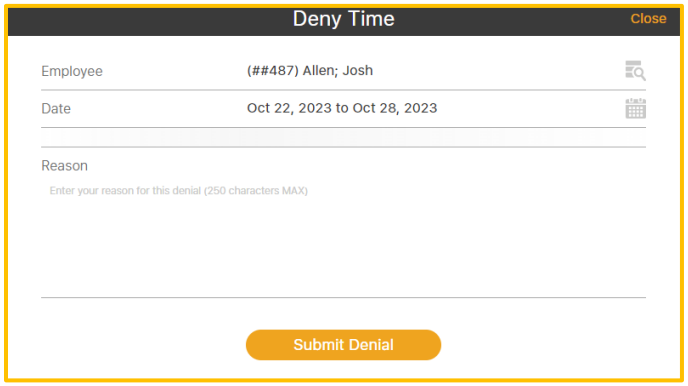


2. Select the Approve icon for each line item to be approved.
3. Select Ok in the Approval Confirmation Page.
4. The line item will turn to a status of Reclaim. For the Payroll Manger, typically the last role in the Approval Path, once all statuses are at Reclaim, the time is ready for export.

To Deny Time from the Labor Time Approval Page:

Use Case: Payroll Managers may make modifications to the time themselves. However, when they do not wish to do so, they can deny time back to a previous level.

1. Select an employee with a click. This will navigate the user back to the Labor Time Sheet.
2. Select More… adjacent to the dates.
3. Select the Deny icon.



4. Enter a reason for denial.
5. Select Submit Denial.
6. An alert stating that time has been denied will appear at the top of the Labor Time Sheet.
7. Time will be sent back through the Workflow approval process, except in backwards order. Meaning, it will only deny the time back to the previous job role in the Workflow (Approval Path) and the Status will change to Promote.
8. It will send the user, at that level in the Approval Path, an hh2 email notifying them that the time was denied back to them in the Workflow (Approval Path).
9. That previous job role in the Workflow (Approval Path) will need to log in and fix the time and select Approve again. The Payroll Manager also has the option to Promote the time to their level.

Viewing Comments on the Labor Time Approval Page:

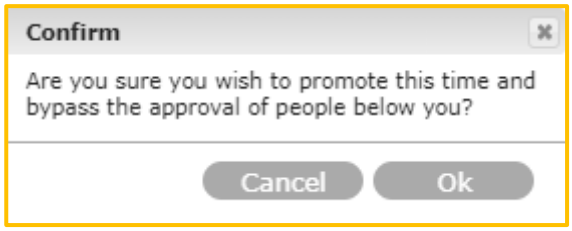
When comments are added on the Labor Time Sheet (RP>Track Time>Labor Time Sheet), they can be viewed on the Labor Time Approval Page. Comments will be highlighted in color next to the employee's name indicating there is a comment for the Payroll Manager to view.

Note: Comments will be displayed on the Excel Spreadsheet during the final review step.

Promoting Time:

Time may be promoted or moved to the next level for a single employee by selecting the Promote icon next to the employee's time on the Labor Time Approval Page. This feature can be used to move time to the next level in the Approval Path, especially when the Payroll Manager has to make final approval and the time has hit roadblocks in the Approval Path.

1. Navigate to RP>Track Labor Time>Time Approval.



2. Select the Promote

icon next to the employee's time.
Select Ok. Time will be promoted to the next level in the Approval Path.

Step 3: Review and Final Approval

After time has moved through the Workflow (Approval Path), and the Labor Time Approval Page displays the gold Approved status, the Payroll Manager must now review the time for accuracy and correct coding. Likewise, the Payroll Manager must execute the final approval before exporting the time to the accounting system.

There are four key ways in which the Payroll Manager may review time prior to final approval:

1. Using the Quick View icon from the Labor Time Approval Page for each employee. This will provide a full labor breakdown by day, based on Pay Type.
2. Reviewing the time sheet from the Labor Time Sheet Page by clicking each employee.
3. Creating an Excel spreadsheet with all employees for the Pay Period. This is an efficient method to review time.
4. Creating PDFs for each time sheet (employee) and reviewing them separately.
5. Using hh2 Reports.

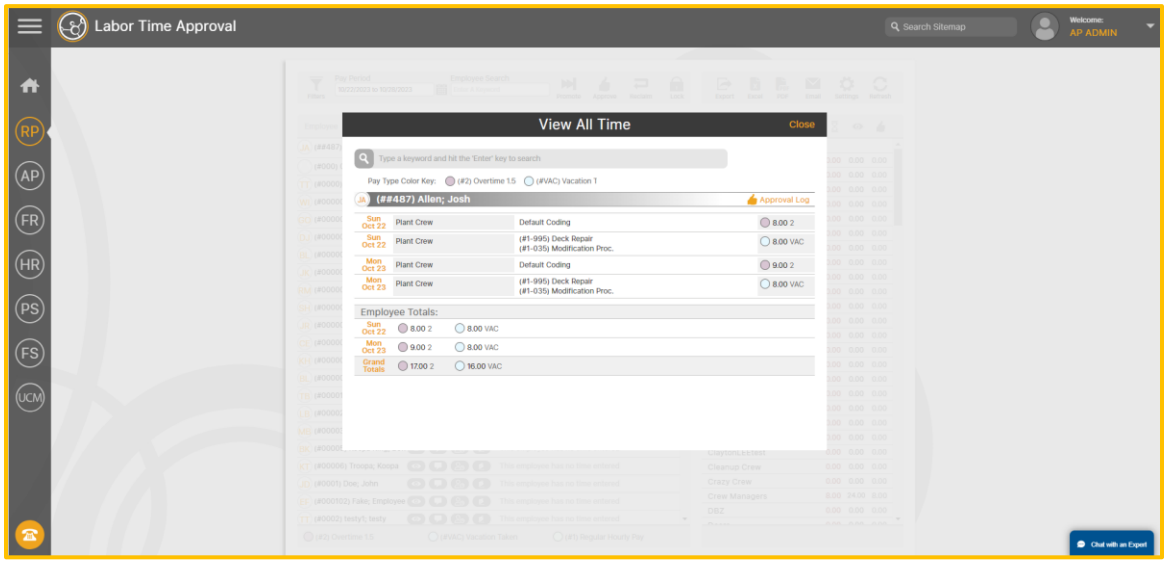
Note: If navigating from the Labor Time Approval Page, and using the Chrome browser, the user can open two tabs. One tab is for the Labor Time Approval Page and the other will be for the Labor Time Sheet. This makes it convenient to toggle between the two pages. Different browsers behave differently.

Review Time Using the Quick View Icon from the Labor Time Approval Page

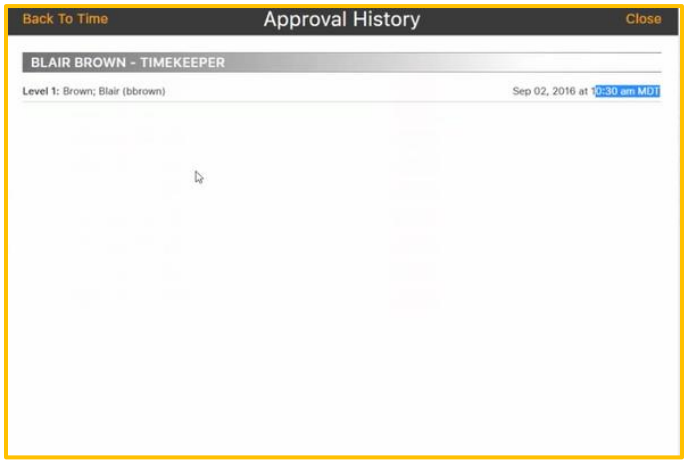
Using the Quick View icon, the Payroll Manager can view employee time by Pay Type. Likewise, the Payroll Manager can also determine at which level in the Approval Path time has passed.

To View the Approval History:

1. Navigate to RP>Track Labor Time>Time Approval
2. Select the particular employee to view with the Quick View icon.



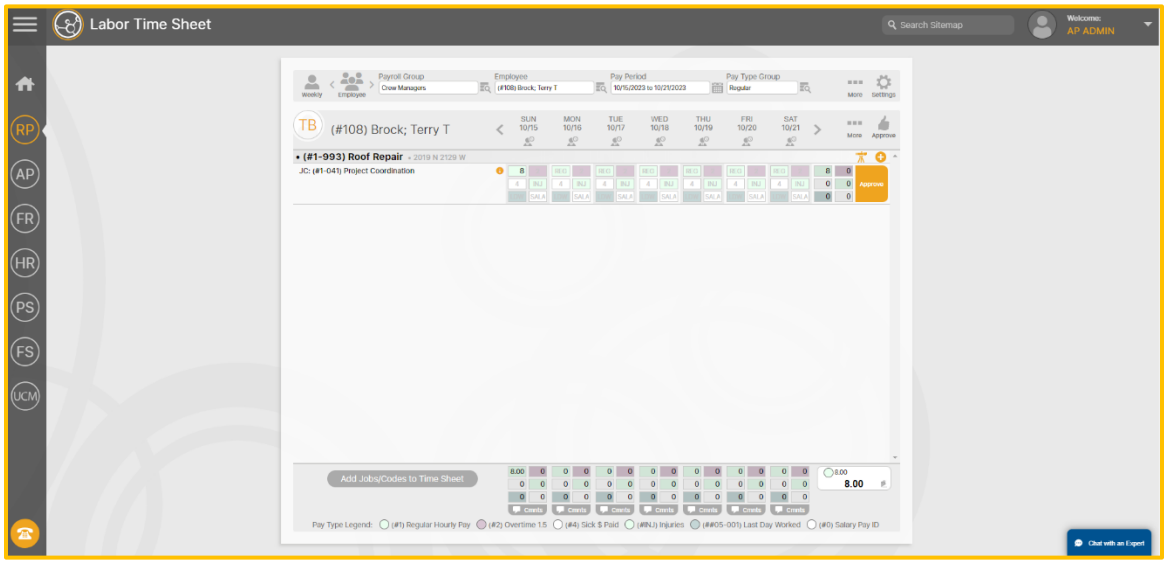
3. Select Approval Log



4. The Approval Log will provide the Payroll Manager information as to which level time sits at within the Approval Path. In the example above, the individual at Level 1 in the Approval Path completed time, as indicated by the date and time.
5. Select either Back to Time to view time or Close to return to the Labor Time Approval Page.

Review Time from the Labor Time Sheet Page

1. Navigate to the Labor Time Sheet (RP>Track Labor Time>Time Sheet).
2. Select the Weekly View to view individual employee time or select the Daily View to view time by Payroll Group, Pay Type Group and Date.



Note: By clicking on any employee line item from the Labor Time Approval Page, the user will be brought directly to back to the Labor Time Sheet for that employee.

Review Using an Excel Spreadsheet

Time can be reviewed using an Excel Spreadsheet from either the Labor Time Sheet (RP>Track Labor Time>Time Sheet) or from the Labor Time Approval Page (RP>Track Labor Time>Time Approval). This provides the Payroll Manager with a means of viewing all employee time at once. See using Excel on the Labor Time Sheet or Excel from the Labor Time Approval Page.

Review Time Using hh2 Reports

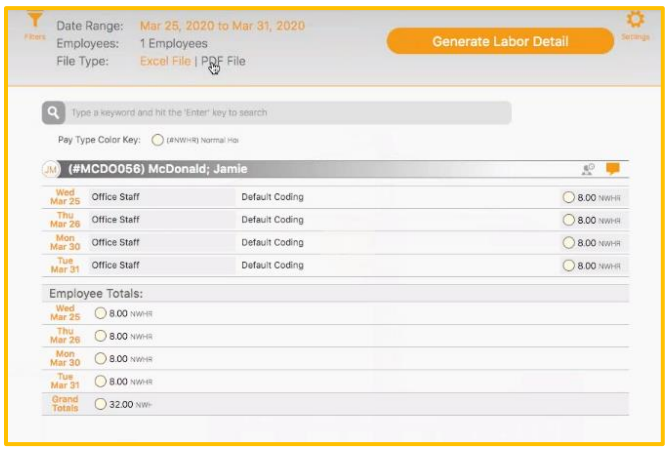
The hh2 Remote Payroll module offers other reports for time review.

- Labor Detail
- Labor Hours and Productivity Summary
- Equipment Detail
- PDF Time Sheets

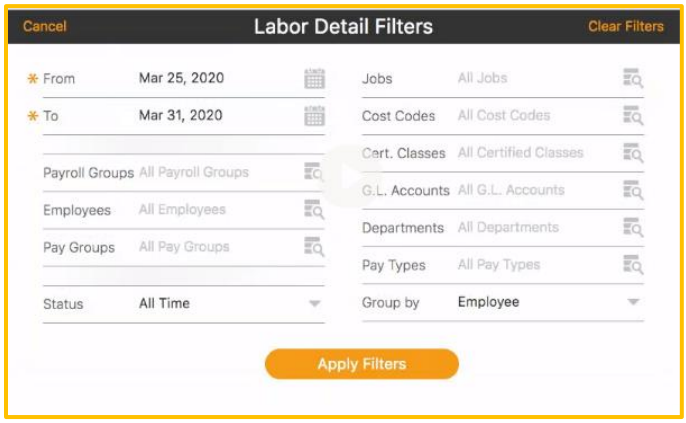
Labor Detail Report

This report generates an Excel or PDF file by selected filters.

1. Navigate to RP>Reporting>Labor Detail.



2. Select the File Type (Excel File or PDF File) by toggling. The colored File Type is the one selected.
3. Select the Filters icon.



4. Enter the From and To Dates, using the Calendar icon.
5. Select any other filters required for the report.
6. Select the filter from the associated Master List and Add Selected Items.
7. Select Apply Filters.

Note: Any manager can run reports on information offered in the filters that they have permission to access. However, Payroll Managers can report on any information available in the filters.

Labor Hours and Productivity Summary

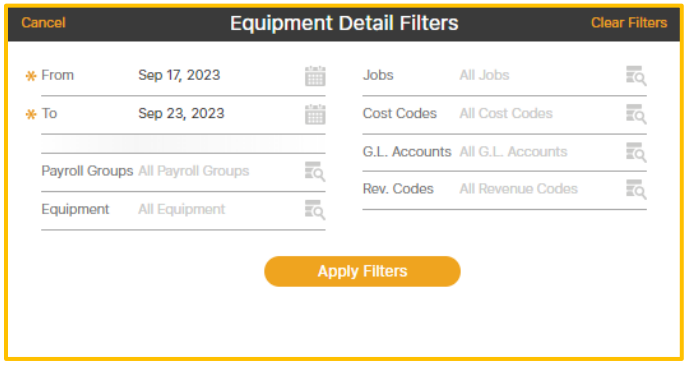
This report generates a PDF summary of budgeted and actual labor hours and production units.

1. Navigate to: RP>Reporting>Labor Hours and Productivity Summary.
   Click on the Magnifying icon .
2. Select a Job from the Master Job List.
3. Check Include Productivity and the report will list Hours Estimated, Actual Hours and Hours Remaining, along with Cost Codes, and Productivity Targets.
4. Check Include Sub-Jobs for a breakdown of hours Posted, Pending and Remaining for Sub-Jobs.
5. If both boxes are checked, the report will include all the above information.
6. Select Generate Report.
7. Select View to view the report or Download to download the report. The report will be found in the Downloads file on the user's device.

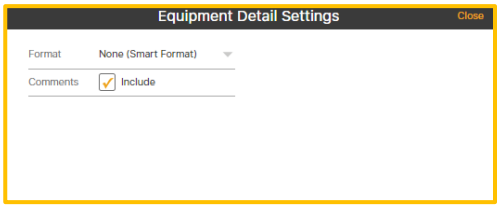
Equipment Detail

This report will provide a summary of equipment revenue time. The file type is an Excel file.

1. Navigate to RP> Reporting>Equipment Detail.
2. Use the Filter icon to filter the report by date ranges, Payroll Groups, Equipment, Jobs, Cost Codes, G.L. Accounts and/or Revenue Codes and Add Selected Items.



3. Select Apply Filters.
4. Select Settings using the Settings icon to select the format and whether comments should be included.



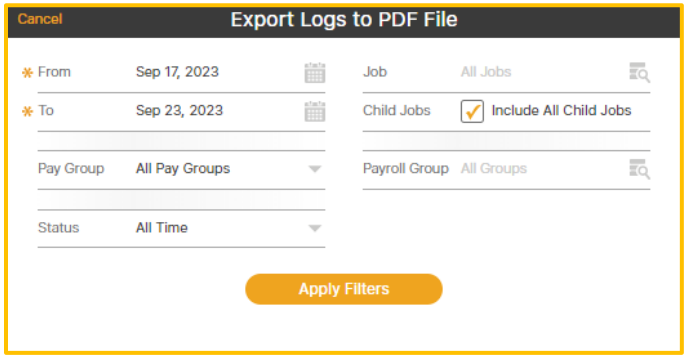
5. Select Close.
6. Search for the Equipment in the Search Field. Equipment time entered and approved for the current pay period will populate, along with the associated job information.
7. Select Generate Equipment Detail.
8. Select Download Equipment Detail.
9. The report can be found in the Downloads file on the user's device.

PDF Time Sheets

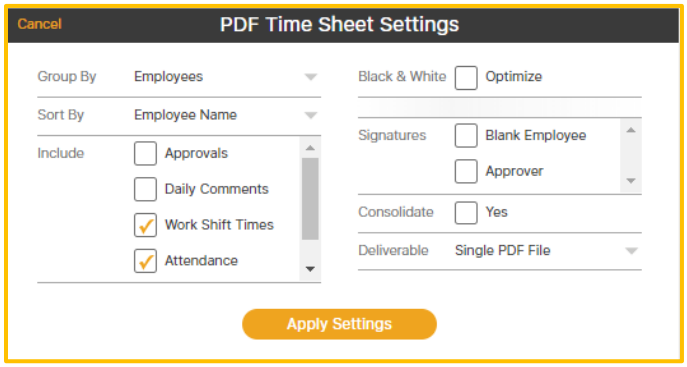
A separate timesheet can be created for each employee for review from either the Labor Time Sheet or from the Labor Time Approval Page. See using PDF reporting from the Labor Time Sheet or PDF from the Labor Time Approval Page. PDF Time Sheets can also be created from the PDF Time Sheets Page.

The PDF Time Sheets represent each employee's written time sheet.

1. Navigate to RP>Reporting>PDF Time Sheets
2. Use the Filter icon to filter the report by date ranges, Status, Jobs, Child Jobs and/or Pay Groups.



3. Select Apply Filters.
4. Select Settings using the Settings icon to select any of the settings listed below for the report:



5. Select Apply Settings.
6. Select Generate Time Sheets.

7. The system will render and create a PDF Time Sheet for each employee in the search.

Note: Employees may also be included using the check mark or excluded using the X. All employees may be included or excluded by toggling between Include All and Exclude All.

The Final Approval Before Exporting

After reviewing time and checking for accuracy, the Payroll Manager conducts the final approval of the time. This is executed from the Labor Time Approval Page (RP>Track Labor Time>Time Approval). See Time Approval.

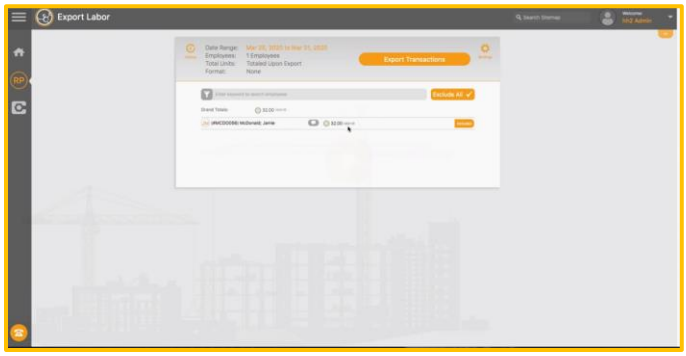
If time has not been turned in the Payroll Manager can promote it to the Approved status. Once approved the status will indicate Reclaim. The Payroll Manager can reclaim it to make modifications up until the time of export. The job role (Levels) below the Payroll Manager will also see the Reclaim status but will not be able to make modifications unless they are at a level above in the Approval Path.

Note: It is best practice to the lock the pay period prior to reviewing time, so others do not enter more time during the review and final approval process. See the Lock icon. If the user chooses not to lock prior to the review, it is best to at least lock it after export. That way any time accidentally added after the export will not continue to display and appear on reporting.

Step 4: Exporting Time to the Accounting System

Time cannot be exported until time has been approved at the highest level in the Approval Path.

1. Navigate to RP>Track Labor Time>Labor Export, or from RP>Track Labor Time>Time Approval.
2. Select the Export icon.



3. Select Export Transactions.
4. After Exporting, the Labor time will display in the accounting system.
5. The status on the Labor Time Approval Page will change to Exported.

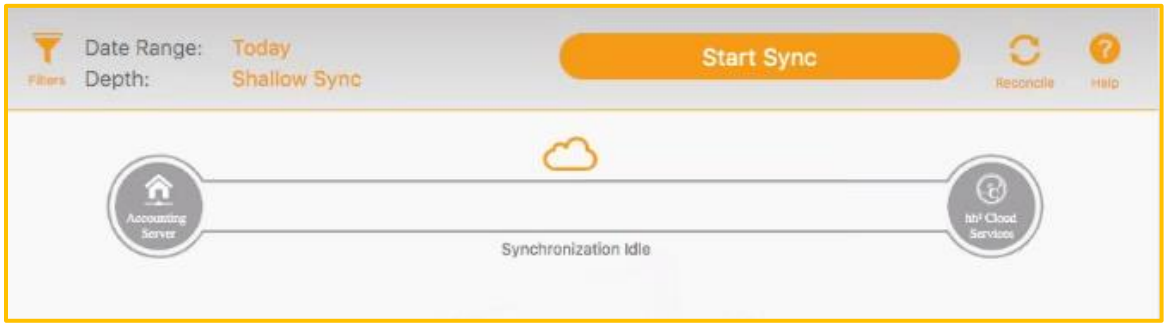
Note: If time was not approved Export Transactions will be disabled and replaced with Nothing to Export on the Export Labor Page.

Accounting Sync

Accounting Sync will synchronize data from the accounting system to hh2. Only users with permissions granted are allowed to perform a manual sync. Permissions are granted from the Home Page>Setup>User Setup>employee>Permissions tab>Can sync? It is recommended that the number of people that have this option is limited.

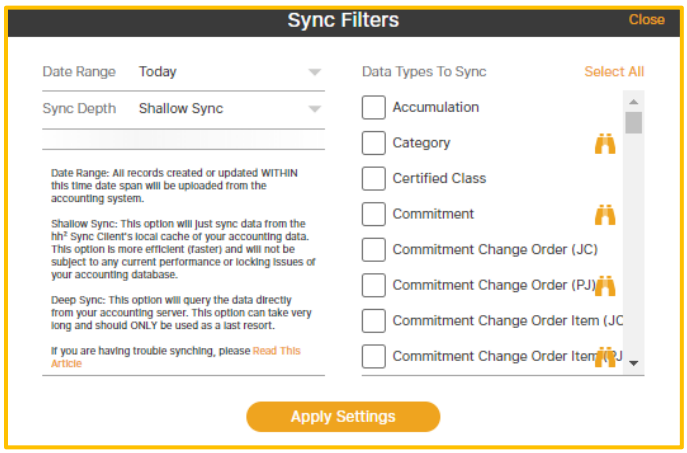
Synchronization will automatically occur regularly. This option is to provide the Payroll Manager/Administrator with a means of bringing information from the accounting system if it has not yet been updated into hh2. **Use Case:** A new employee was not uploaded from the accounting system yet needed to add time prior to the next automatic synchronization.

Navigation: Home Page> Your Company's Data> Accounting Sync



To Run a Sync:

1. Select the Filter icon to filter the type of information to sync. The fewer records that need to be processed, the faster the synchronization will occur.



2. Read the information on the Sync Filters Page to help determine the Date Range and Type of Sync (Shallow or Deep).
3. Check the types of data to sync. Select All can be used to check all Data Types to Sync. The Sync by Search icon can be used to further narrow the sync.
4. Select Apply Settings.
5. Select the Reconcile icon to remove any categories in hh2 that have been deleted from the accounting system.
6. Select Start Sync.
7. Select the Help icon for further information about Synchronization.
8. All Entities Processed will display when the Synchronization is complete. However, there may be a brief time lag before the data can be seen.

Notes about Synchronization:

- Automatic synchronization typically occurs about every hour.
- If an automatic synchronization is already in progress, the manual synchronization will take longer.
- Once in process, synchronizations cannot be cancelled.
- The Date Ranges and Data Types will limit the amount of data in the synchronization. It is important to not synchronize too much data at once.
- Other work in hh2 can continue during a synchronization.

- It is recommended that users contact hh2 Support if a Deep Synchronization or synchronizing for all Date Ranges is being considered.
- For Remote Payroll synchronization is one way from the ERP accounting system up to hh2. Downloads from the hh2 cloud to the ERP system do not occur for Remote Payroll.

Equipment

Equipment Revenue

Some construction companies choose to track how long equipment is used. The Equipment Revenue feature allows for this. This feature operates in very much the same manner as tracking time for employees. Instead of coding labor to an employee, employee time is copied to a piece of equipment for revenue tracking. Equipment Revenue will move through an Approval Path and ultimately exported, just like labor time.

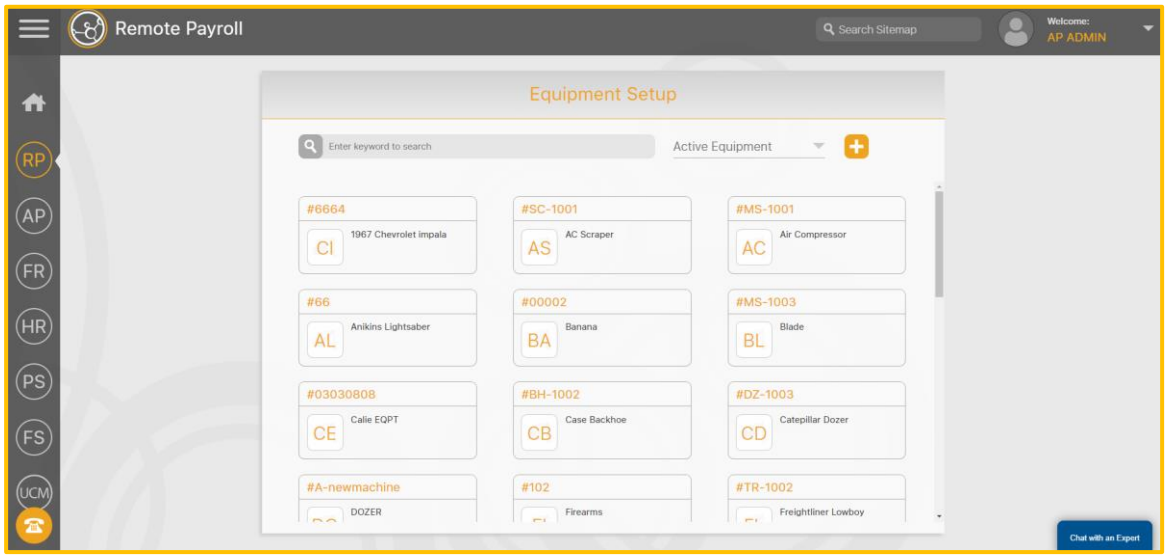
Equipment Revenue requires the Payroll Manager to have permissions (RP>Payroll Users>Username from the Payroll User Setup>Permissions> Check Is Eq. Manager). This permission provides the ability to manage equipment and export equipment time. By enabling this function for non-Payroll Managers, equipment time can be managed without having to contact the Payroll Manager. **Note:** This feature does NOT code an employee's time against equipment (i.e., Equipment Cost).

Equipment Set Up and Configuration

- ✓ Equipment Set Up and Configuration requires the following:
- ✓ Set up of the Master Equipment List
- ✓ Enabling Equipment in the necessary Payroll Groups
- ✓ Equipment Assignment to Employees
- ✓ Revenue Code Enablement

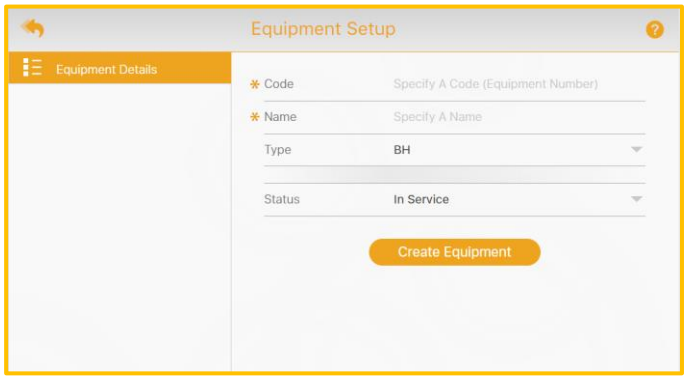
The Master Equipment List for Equipment

Payroll Managers with equipment permissions have access to the Master Equipment Setup (RP>Payroll Users and Groups>Equipment). This list syncs from the ERP system. Management of an equipment's active vs inactive status, Payroll Group membership, and/or photo can be managed through this menu. Updates to the equipment's code, name, type, and/or service status are recommended to be completed within the ERP to ensure a seamless export process.



To Add Equipment to the Master Equipment Setup List:

1. Contact a hh2 representative to enable the capability to manually create Equipment.
2. Navigate to the Home Page> Set Up>System Settings>General Settings tab> and check Create Equipment.
3. Navigate to RP>Payroll Users and Groups>Equipment.
4. Select the Add + icon.

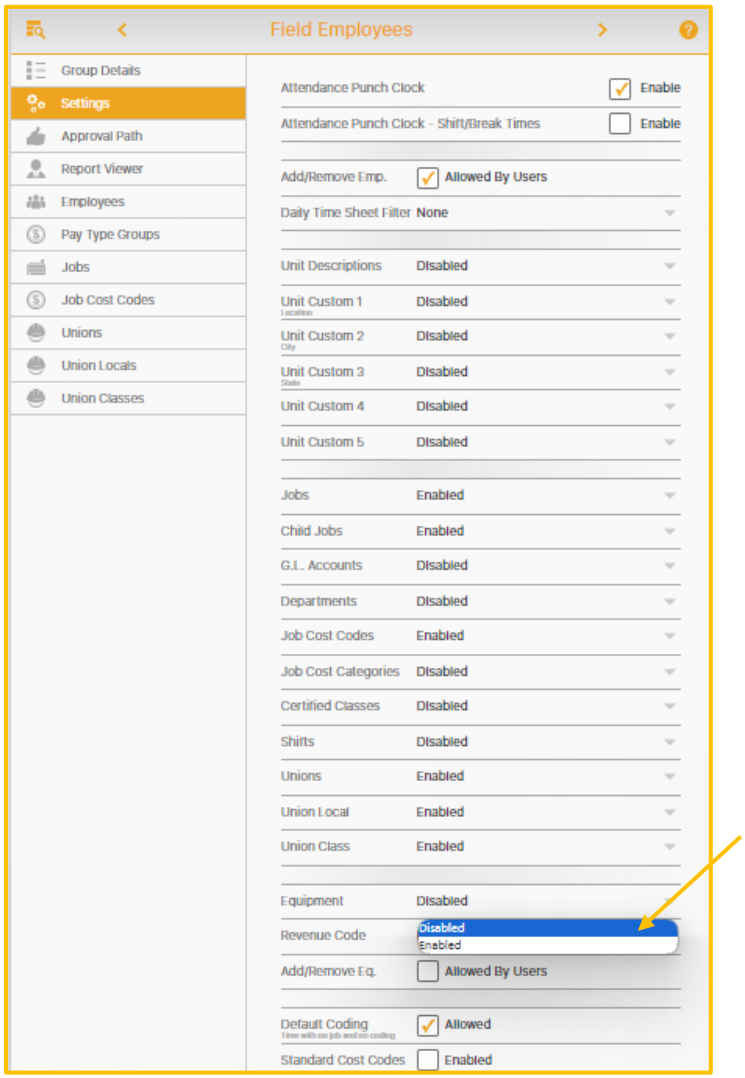


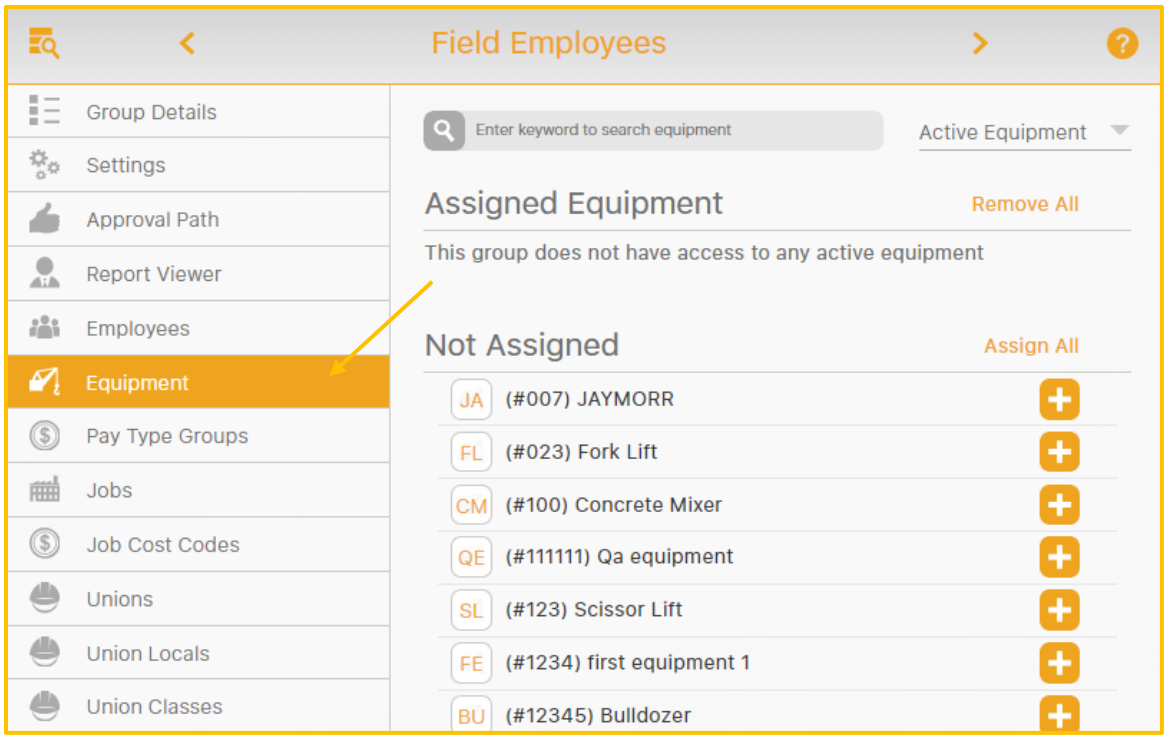
5. Enter the Equipment Code.
6. Enter the Name of the equipment.
7. Enter the Type of equipment (optional).
8. Status (in service or out of service).
9. Select Create Equipment.

Payroll Groups and Equipment

Navigation: RP>Payroll Users and Groups>Payroll Groups

Just like Labor time, Equipment time is driven by a Payroll Group. As with Labor, the Payroll Group provides users access to certain equipment for coding time to the equipment. Access to coding to equipment is defined in the Payroll Group Setup (RP>Payroll Users and Groups>Payroll Groups>specific Payroll Group on Payroll Group Setup>Settings tab>Equipment=Enabled). This will display the Equipment tab in the Payroll Group Setup.

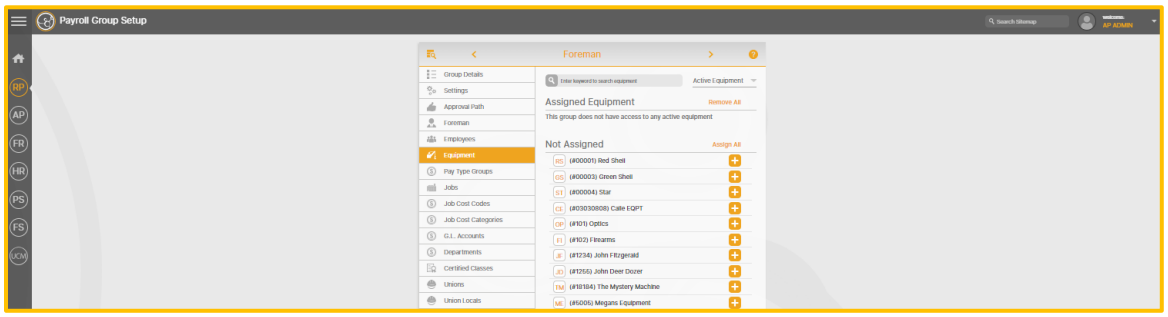




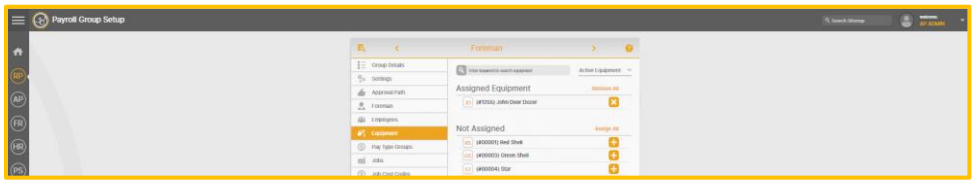
When selected, the Equipment tab lists all equipment in the Master Equipment List. Here the Payroll Manager can Add or Remove any equipment that the Payroll Group should or should not have access to for coding.

To Add Equipment from a Payroll Group:

1. Navigate to RP>Payroll Users and Groups> Payroll Groups.
2. Select the Payroll Group.
3. Select the Equipment tab.

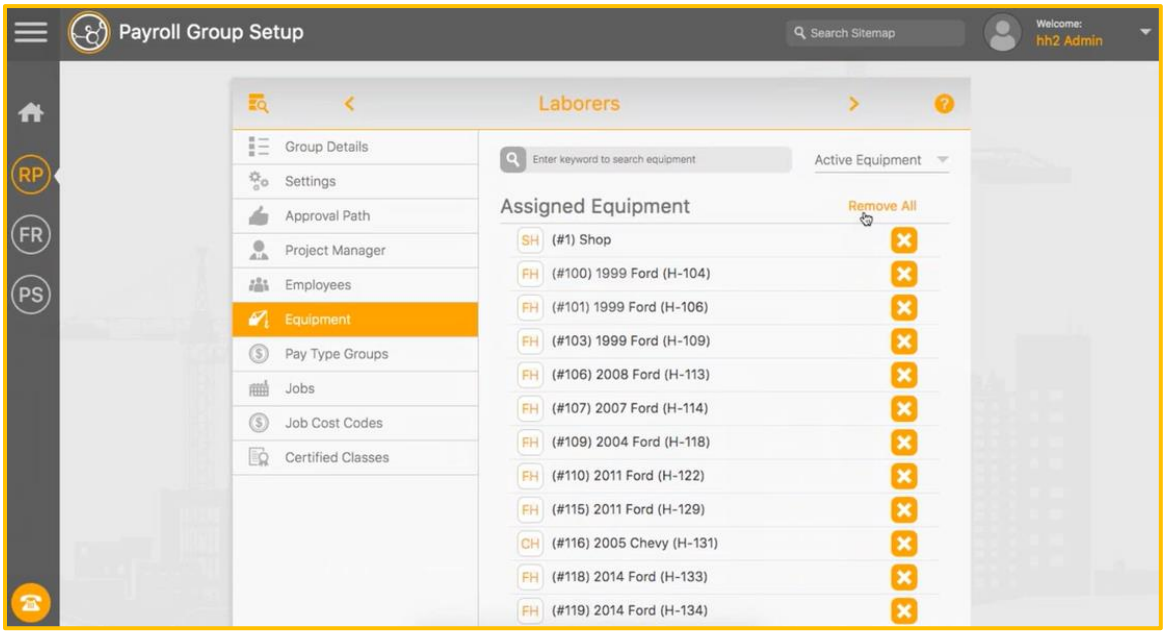


4. Select the Add + icon next to the equipment to be added. Select Assign All to add all equipment from the Payroll Group.
5. Equipment added will then be displayed beneath the Assigned Equipment section for the Payroll Group.



To Remove Equipment from a Payroll Group:

1. Navigate to RP>Payroll Users and Groups> Payroll Groups.
2. Select the Payroll Group.
3. Select the Equipment tab.



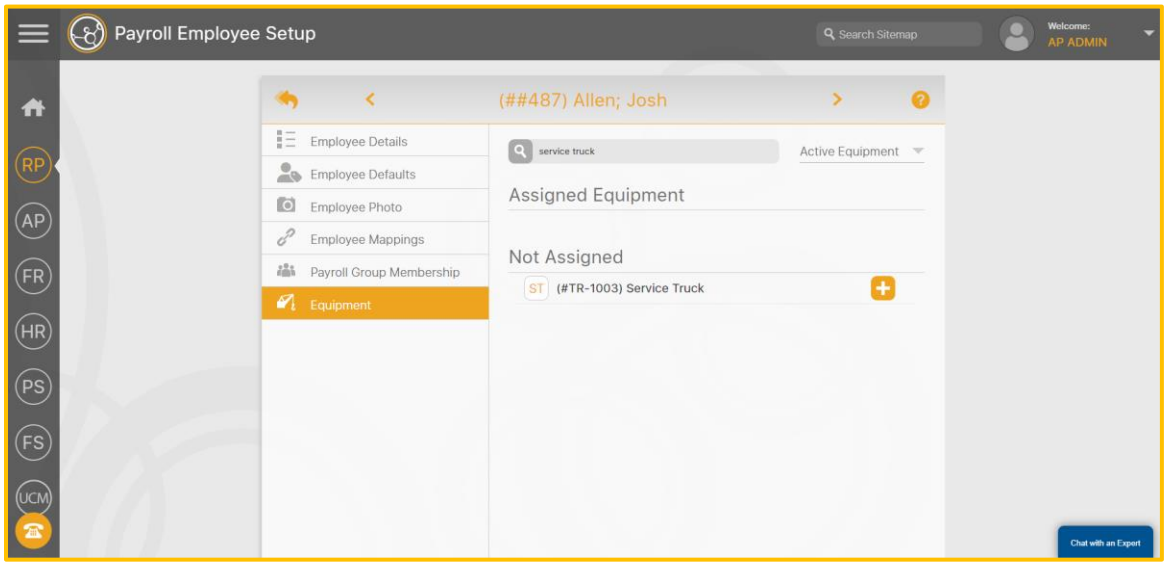
4. Select the Remove icon next to the equipment to be removed. Select Remove All to remove all equipment from the Payroll Group.

Equipment Assignment to an Employee

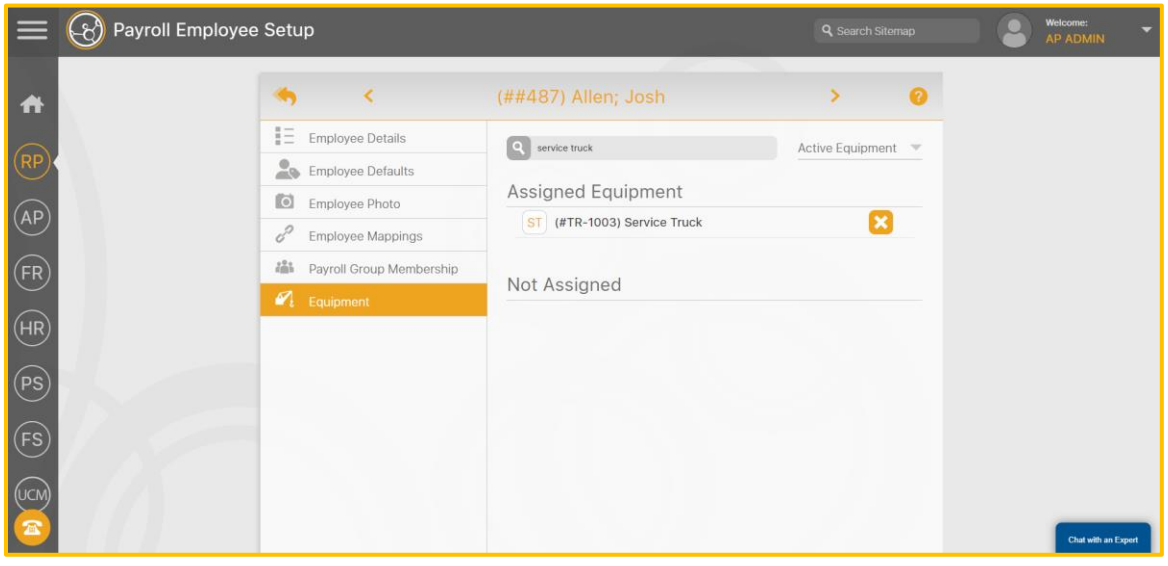
To Assign a Piece of Equipment to a Single Employee:

Use Case: An employee consistently uses a company truck throughout their day and thus the truck's time will be replicative of the employee's time.

1. Navigate to the Payroll Employee Setup (RP>Payroll Users and Groups>Employees>select the employee>Equipment tab).



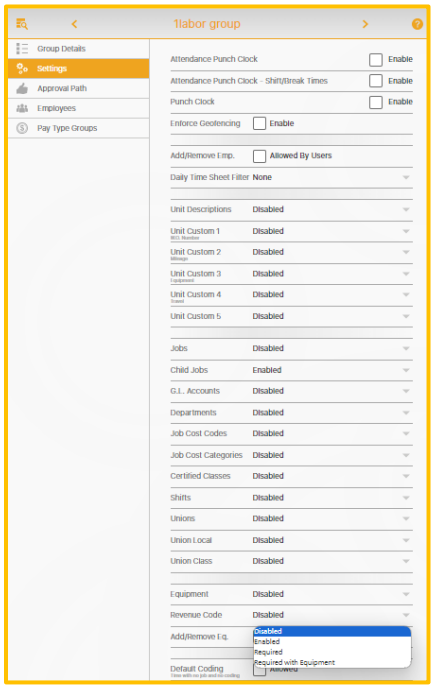
2. Select the Add + icon next to the equipment in the Not Assigned Section.
3. The Equipment will then be displayed below Assigned Equipment, and the employees will be permitted to code time to it.



Revenue Code Enablement

Revenue Codes define the rate (hourly, daily, or weekly) to which a piece of equipment will be coded. This code is used by the accounting system and its use is dependent upon the accounting system used. It is enabled in the Payroll Group Setup Page. When enabled, the revenue code will appear on the Equipment Time Sheet.

1. Navigate to RP>Payroll Users and Groups>Payroll Group Setup>select the Payroll Group>Settings tab> Revenue Code.



2. Select from the following:

- Disable: Revenue codes are not used
- Enabled: Revenue codes can be used but are not required.
- Required: Revenue codes are required
- Required with Equipment: Revenue codes are required when coding to equipment.

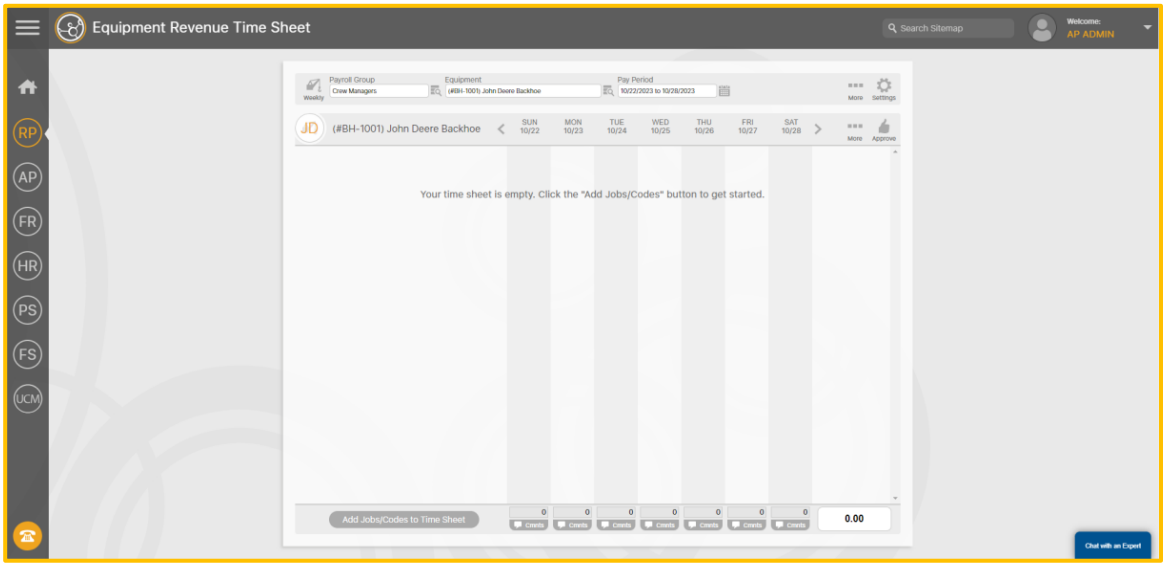
Note: When the Revenue Codes field is set to required, the user will be prompted for a revenue code when keying time for equipment.

Note: The Revenue Code field is an optional coding field that can be utilized within hh2. If the accounting system has default revenue codes setup on the equipment items and those will not be changing, then revenue codes do not need to be used in hh2.

Equipment Revenue Time Sheet

The equipment time sheet functions just like the Labor Time Sheet. The purpose of the Equipment Revenue Time Sheet is to code time against a piece of equipment.

Navigation: RP>Equipment Revenue>Equipment Time Sheet.



The Equipment Revenue Time Sheet Page allows searches by:

- Payroll Group
- Equipment
- Pay Period

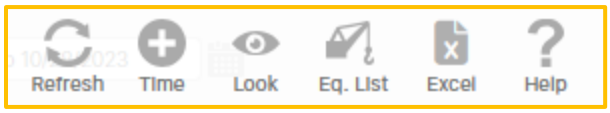
On the Equipment Revenue Time Sheet Page, the Payroll Manager can also toggle between Weekly and Daily views using the Weekly

icon in the upper left corner. Daily views are considered a shared view, and the user can see more than one piece of equipment.

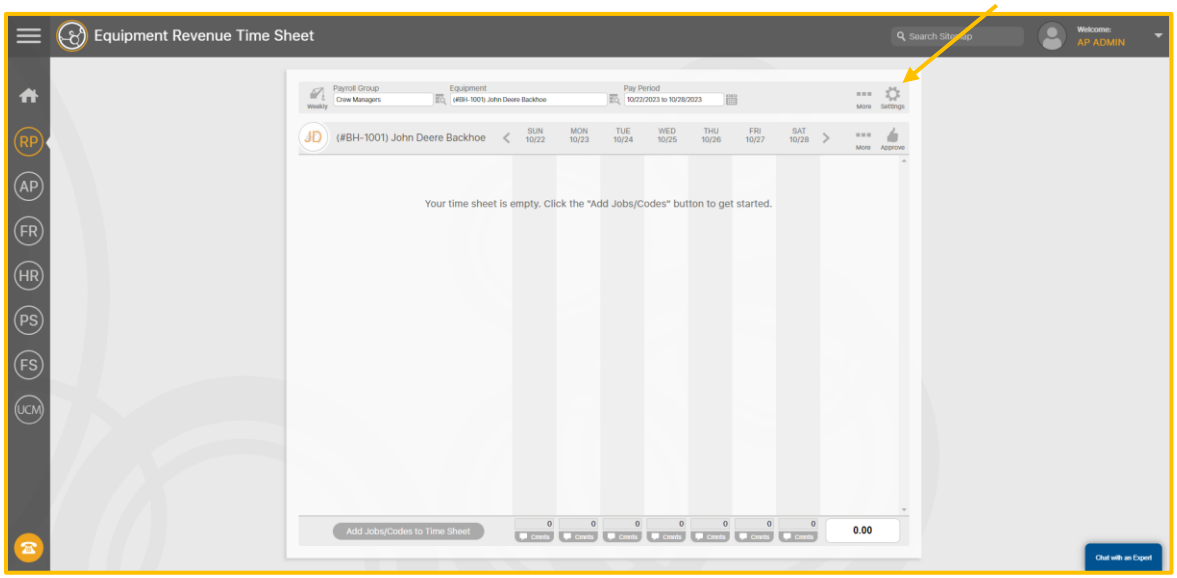
Note: Equipment Revenue Time may also be copied from the Labor Time Sheet. See To Add Time to Equipment Revenue.

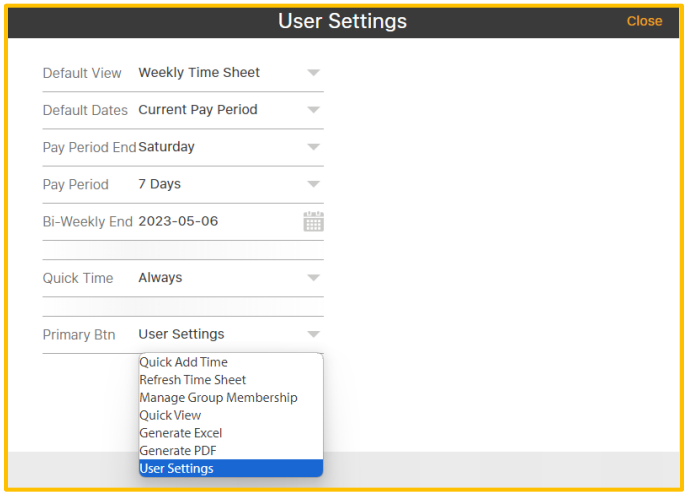
Tools on the Equipment Revenue Time Sheet

Like the Labor Time Sheet, there are tools on the Equipment Revenue Time Sheet. When More… at the top of the Equipment Revenue Time Sheet is selected, a variety of other tools appear for use on the Equipment Revenue Time Sheet Page.

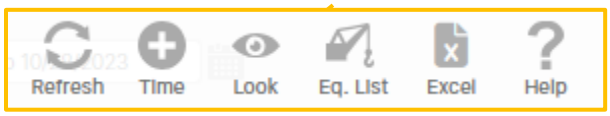


One of these tools can be displayed outside the More button based on the User Preference set in the User Settings (RP>Equipment Revenue> Equipment Time Sheet> More…>Settings icon>Primary Button.



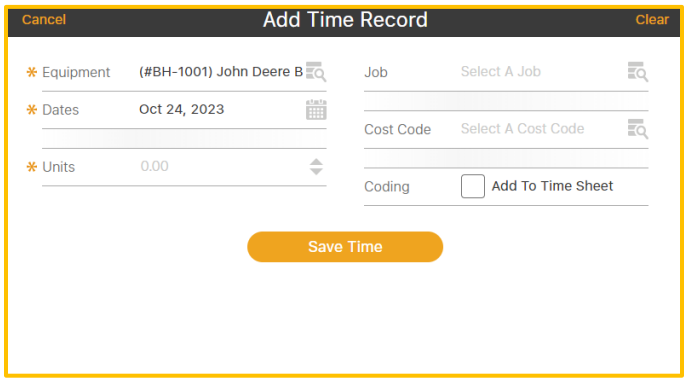


Refresh: This icon will refresh the time sheet data.



Refresh: This icon will refresh the equipment revenue time sheet data.

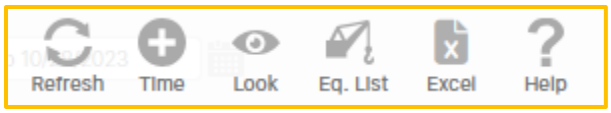
Time: Allows the user to add a time record to the equipment.



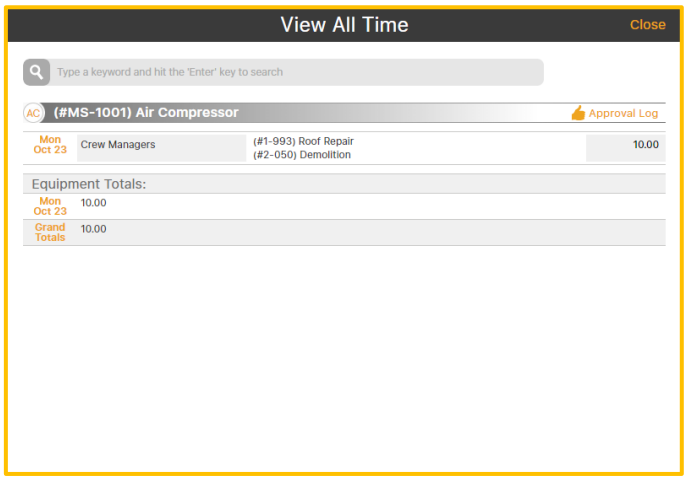
To Add Time Using the Time icon on the Equipment Revenue Time Sheet Page:

Note: This provides an alternative method to enter time instead of keying it directly onto the Equipment Revenue Time Sheet Page.

1. Select More…at the top of the Equipment Revenue Time Sheet Page.
2. Select the Time icon.
3. Enter the Equipment or use the search to find the equipment.
4. Enter the Date.
5. Enter the Units (of time).
6. Enter any additional information needed (a description, Job, Cost Code, Category Coding).
7. Check Coding to add coding to the time sheet.
8. Select Save Time.



Look: Allows the user to view all the time entered for the equipment.



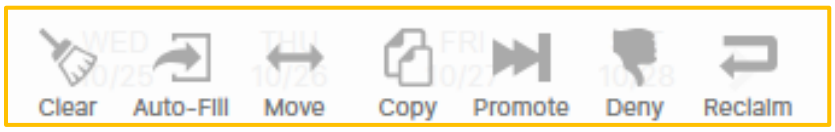
Note: The Approval Log may be accessed from the View All Time Page. The Approval Log allows the user to see who has approved the Equipment's time and when. It is not a full audit of the Equipment's history.

Excel: Creates an Excel spreadsheet with the equipment's time. It must be downloaded to view.

Help: Takes the user to related Knowledge Base articles.

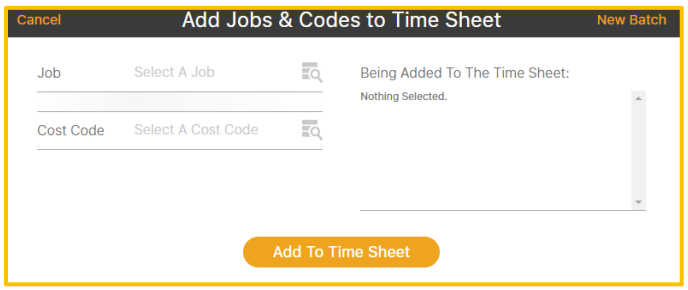
Additional Tools on the Equipment Revenue Time Sheet

Just like the Labor Time Sheet, the Equipment Revenue Time Sheet has additional tools. However, here they apply to equipment time versus labor time. These tools are accessed from More… adjacent to the days of the week on the Weekly View or the employee names on the Daily view. They function similarly to the same tools found on the Labor Time Sheet. Copy, Promote, Deny and Reclaim are used during the Workflow step of Remote Payroll. These functions are utilized in the same manner for both Equipment and Labor time. See Additional Tools on the Labor Time Sheet.



To Add Time to the Equipment Revenue Time Sheet Page:

1. Navigation: RP>Equipment Revenue>Equipment Time Sheet.
2. Select Weekly or Daily in the upper left corner.
3. Select the Payroll Group.
4. Select the Equipment
5. Select the Pay Period.
6. Select Add Jobs/Codes to Time Sheet.
7. Select the Job.
8. Select Cost Code
9. Select Add Selected Items.

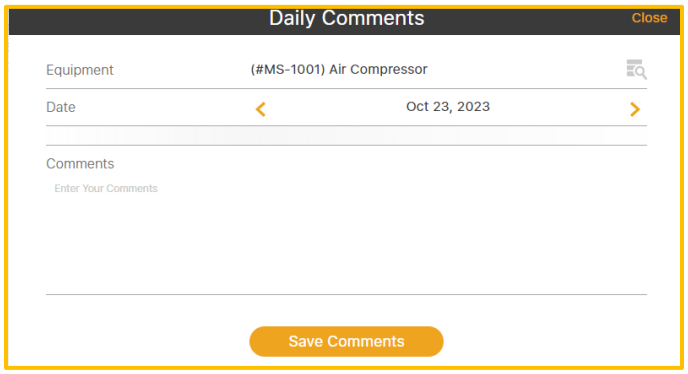


10. Select Add to Time Sheet.
11. The coding line will now display with the newly added Job and Cost Code. Likewise, the Job Explorer , Approval

and Delete

icons will now display.
12. Select a box aligned with the date and coding where time should be entered.
13. Enter the numerical value for the amount of time coded to the Equipment.

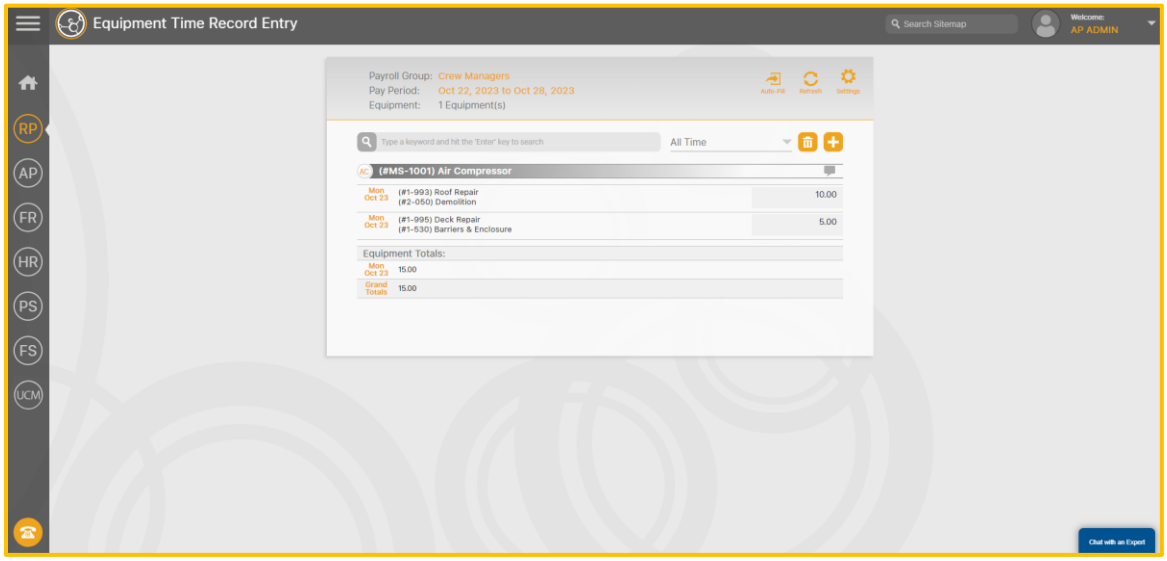
The Comments **icon:** Employees or managers can enter a daily comment on the Equipment Revenue Time Sheet. When a comment is added on the Equipment Revenue Time Sheet, it will display on the Equipment Time Approval Page.



Equipment Time Record Entry

Navigation: RP>Equipment Revenue>Time Record Entry

The Time Record Entry Page provides an alternative means for entering equipment time. It displays in a list view rather than a spreadsheet view.



Like the Equipment Revenue Time Sheet, the Payroll Group, Pay Period, and Equipment display.

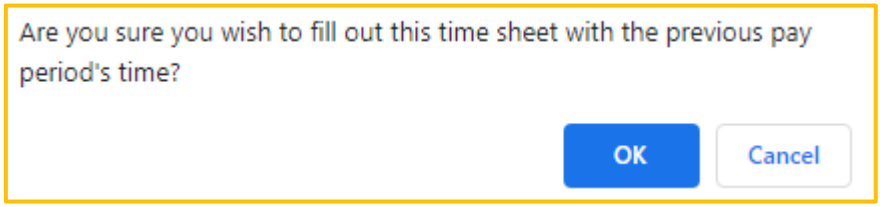
Tools on the Equipment Time Record Entry

Auto-Fill: For ease and speedy time entry, the auto-fill feature populates the Equipment Time Record Entry with the previous pay period's time.

To Use Auto-Fill:

1. Select the Auto-Fill

icon.

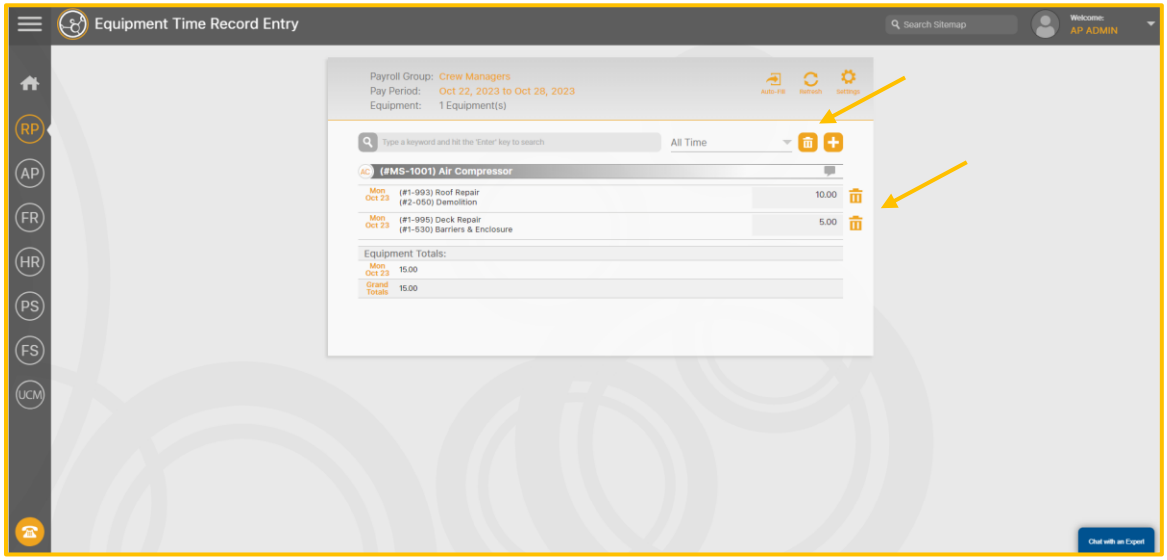


2. Select OK. When OK is selected, the previous pay period's time will fill the Equipment Time Record Entry Sheet with the previous pay period's time against the equipment.

Likewise, the Time Entry Settings Page (for equipment) function like the User Settings on the Labor Time Sheet. The user can add and delete time from the Time Record Entry Page (for equipment), in the same manner as on the Labor Time Sheet. See To Add Time Using the Time icon on the Equipment Revenue Page.

To Delete Time from the Time Record Entry Page:

1. Select the Delete icon. This enables Delete icons next to each time line item.



2. Select the Delete icon for each line item to delete. This will remove the time.

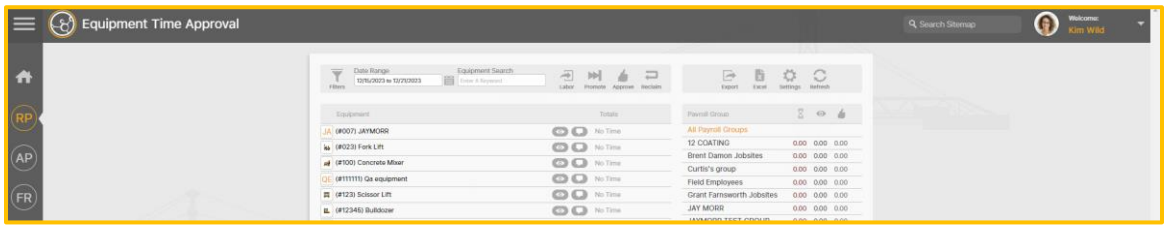
Equipment Workflow

Just like Labor Time, Equipment time follows the Approval Path specified for the Payroll Group (RP>Payroll Users and Groups>Payroll Groups>specific Payroll Group>Approval Path tab). **Note:** The Approval Paths are set up by user role. Likewise, the Approval Path is structured by levels. These are customizable to meet the preferences and needs of the construction company. See Step 2 Workflow (Approval Path).

Equipment Time can be copied from Labor. It may also be Promoted, Approved and Reclaimed from the Equipment Time Approval Page, just like labor is from the Labor Time Approval Page. See Labor Time Approval Page.

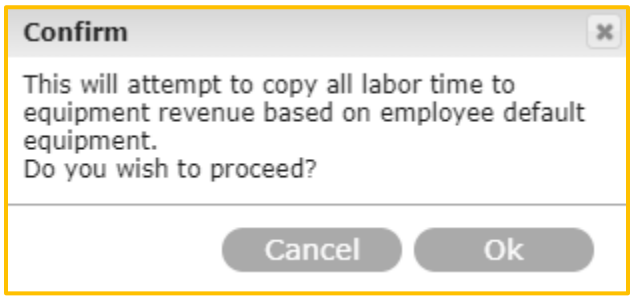
Navigation: RP>Equipment Revenue>Equipment Time>Equipment Time Approval

Note: The Equipment. Revenue entered on the timecard for the employee is a tool to quickly copy the employee's time and code to the equipment's time sheet. So rather than having to manually enter the same time in both places users only enter the equipment time for the employee and can copy it to the equipment.



To Copy All Labor Time to Equipment Revenue based on Employee Default Equipment:

1. Navigate to the Equipment Time Approval Page.



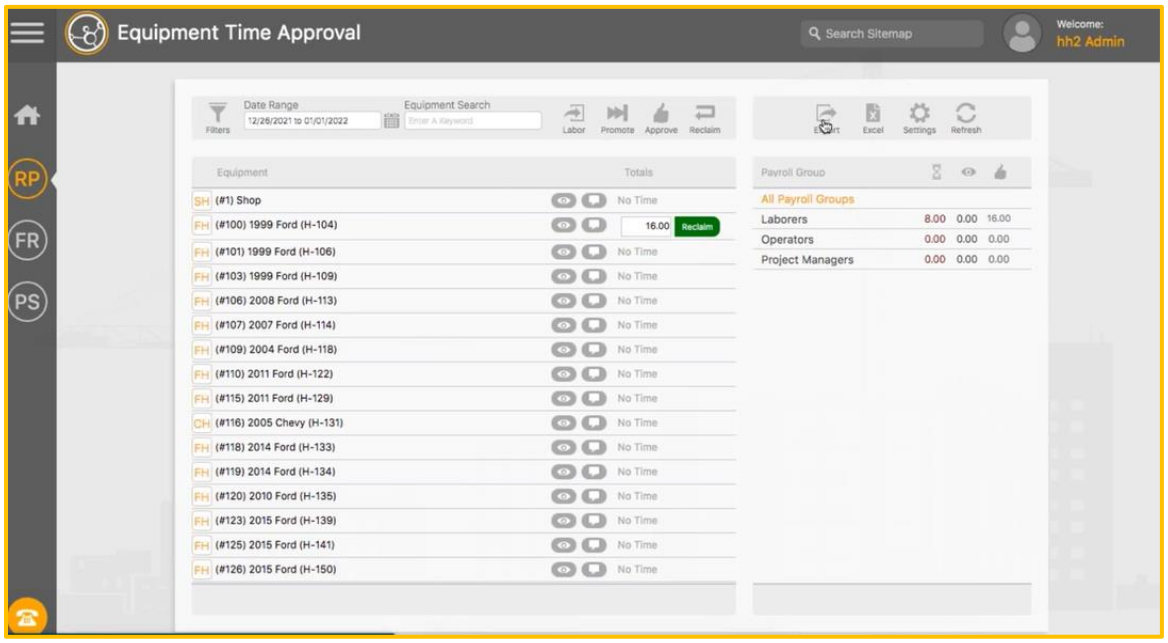
2. Select the Copy Labor

icon.
3. Select Ok.

Exporting Equipment Time

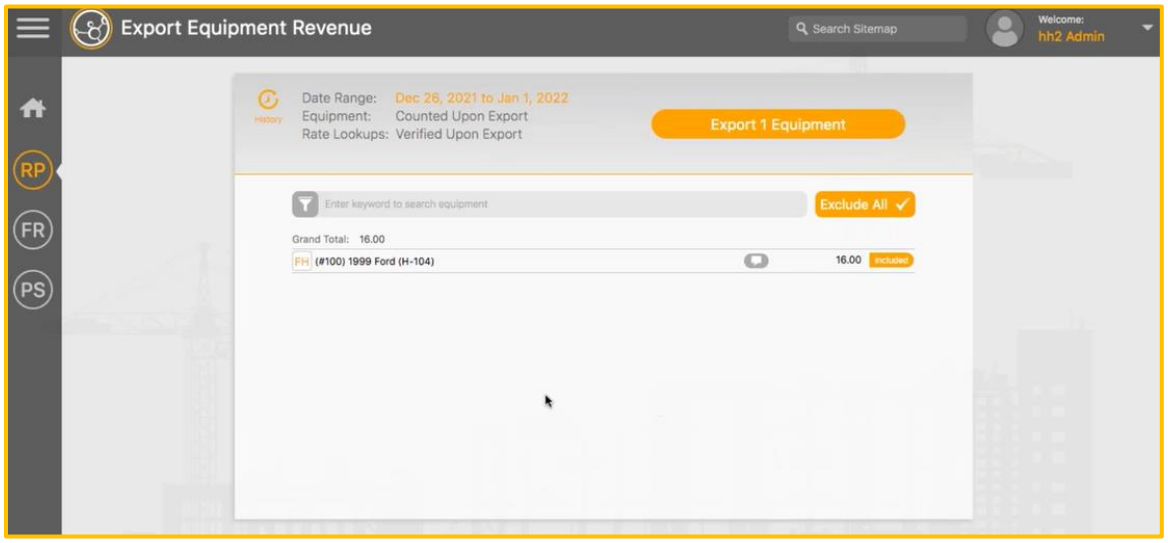
Navigation: RP>Equipment Revenue> Equipment Time Export

1. Just like time for labor, all time must be approved for the equipment time prior to exporting to the accounting system. All time that is approved will be displayed with the green Reclaim Reclaim icon.

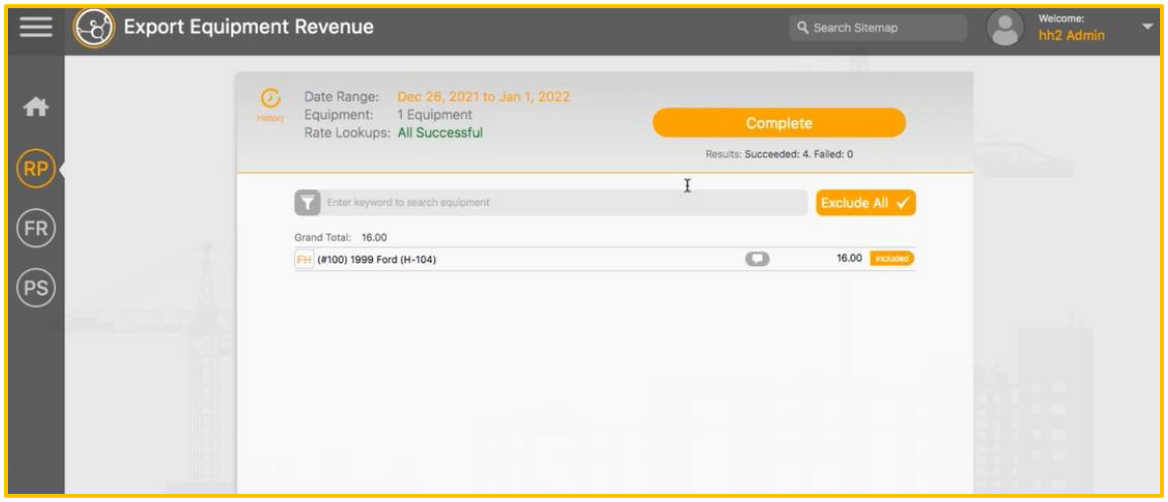


2. Select the Export icon. The Export icon can also be accessed through RP>Equipment Time Approval.

3. The Export Equipment Revenue Page will be displayed with a preview of the export.



4. Double check dates.
5. Select Export 1 Equipment.
6. The export display results. If the export fails, click the History icon to view the Equipment Export Log to review the failure.



7. After Exporting, the Equipment time will display in the accounting system.

Note: While Labor exports cannot be undone (with the exception of a few accounting systems), Equipment exports can be undone, using the Undo icon on the Equipment Export Log Page.

Note: If there is a plan to undo an export, first ensure to remove any imported data within the accounting system first before re-doing the export. This will reduce the risk of duplicate data being created within the accounting system. It is recommended that the user contact hh2 for assistance in this matter.

Punches and Attendance

Punch Clock

This feature provides the construction company with the ability to have employees punch time in and out. This feature is not to be confused with the legacy Attendance Punch Clock feature which does not capture coding information. The new Punch Clock feature captures coding information. Punch Clock time, just like labor and equipment, will be routed through an Approval Path and ultimately exported to the accounting system.

Punch Clock Set Up and Configuration

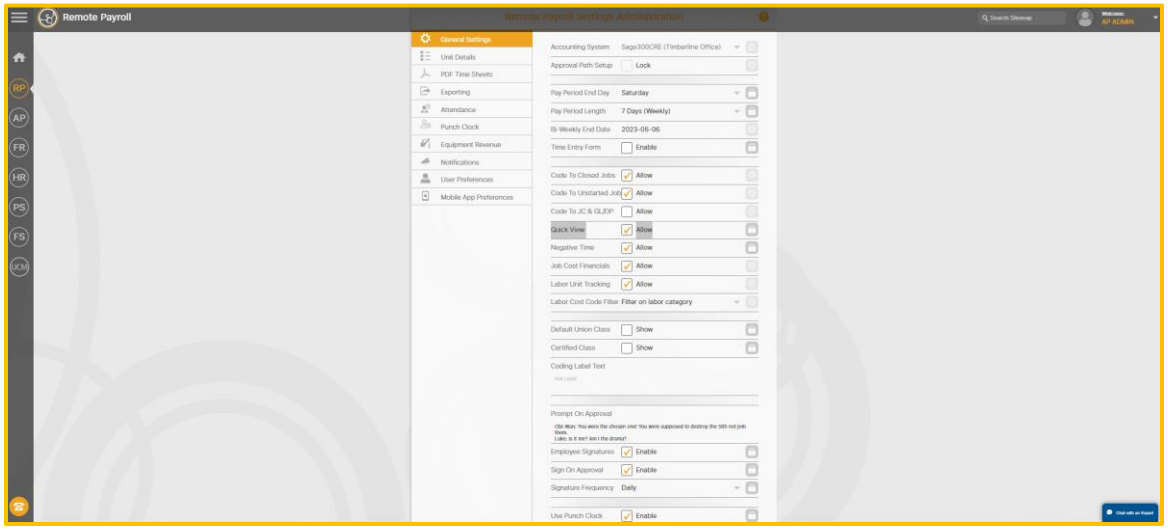
The Punch Clock feature must be enabled in order for it to function. There are four steps in the set up for Punch Clock:

1. Enable the Punch Clock Feature
2. Select options for rounding and capturing GPS coordinates and photos.
3. Turn on the Punch Clock for individual Payroll Groups and select defaults
4. Grant Permissions in the Approval Path for the Payroll Group.

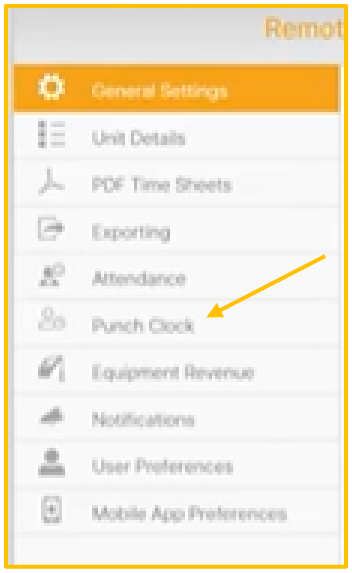
Punch Clock Enablement

To Enable the Punch Clock Feature:

1. Navigation to RP>Settings>System Settings>General Settings tab>check Use Punch Clock. **Note:** This can only be executed by the hh2 Administrator. If this setting has not yet been enabled, please contact the hh2 support team for assistance.



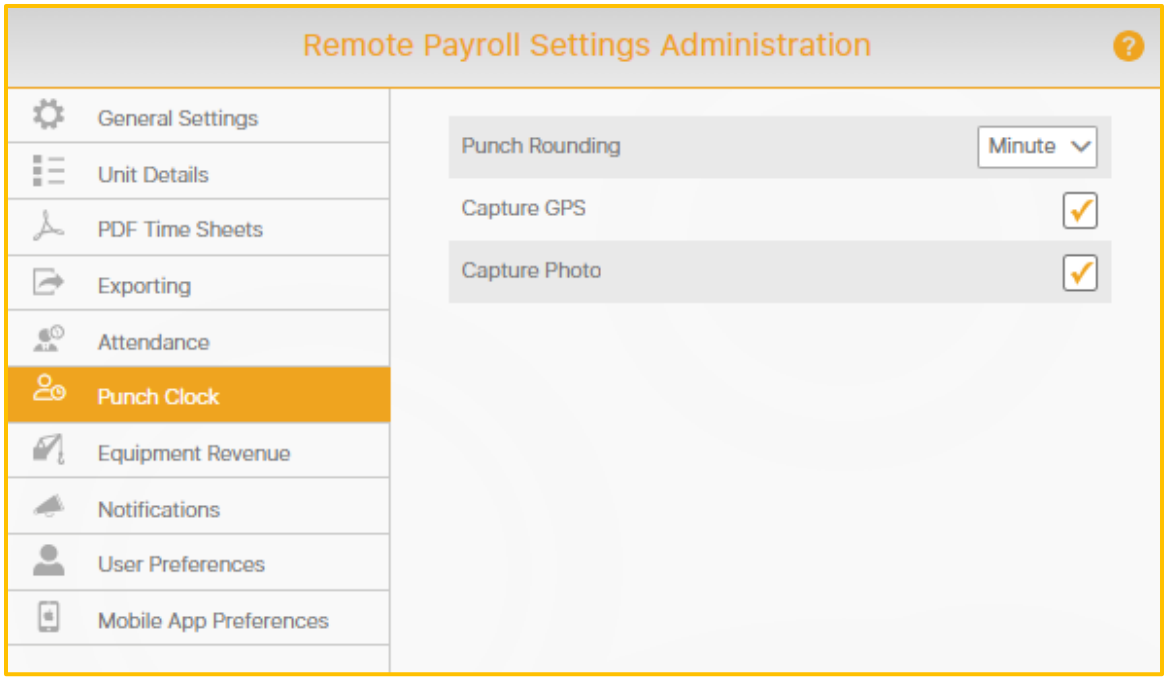
2. Check Use Punch Clock to enable it.
3. Refresh the page. Once refreshed Punch Clock will be added to the list of tabs.



Punch Clock Options

To Select the Punch Clock Options:

There are three options in the Punch Clock tab (Punch Clock Rounding, Capture GPS, and Capture Photo):



1. Navigate to RP>Settings>System Settings>Punch Clock tab.
2. Select from the following options:

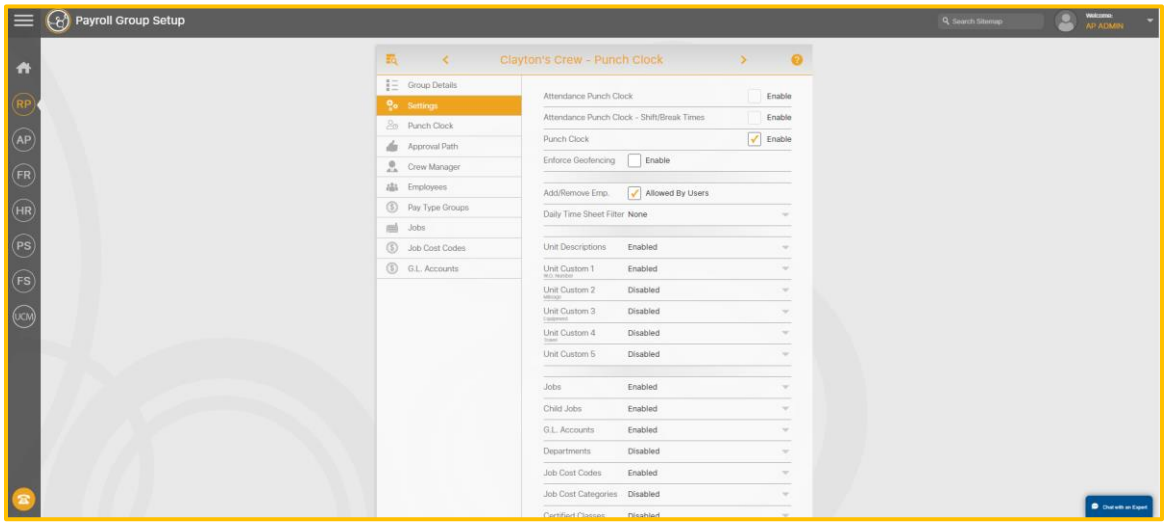
- **Punch Clock Rounding** (Minute, Quarter-hour, Half-hour, Full-Hour). This setting determines to what degree punches are rounded. This setting's default is set to round to the nearest minute. Use the Picklist to select time rounding.
- **Capture GPS** (captures the coordinates of where the punch was made).To enable the capturing of GPS coordinates, check the box next to Capture GPS. **Note:** This is not Geo-fencing. This feature only captures the coordinates of the employee at the time of punching in or out.
- **Capture Photo** (captures the employee's photo upon punching time-this feature is not required). To enable capturing of the employee's photo, check the box next to Capture Photo.

Punch Clock Payroll Groups Set Up

To Turn on the Punch Clock for Payroll Groups:

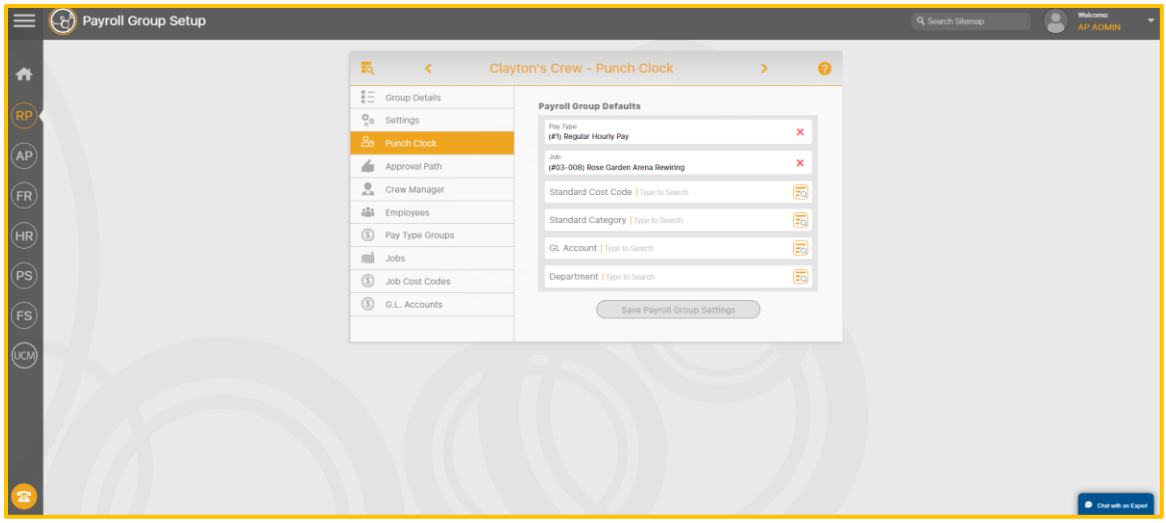
The Punch Clock feature can be enabled for select Payroll Groups. This provides the construction company with the ability to limit which Payroll Groups utilize the Punch Clock. For instance, salaried employees can be set up in a separate Payroll Group from those employees that require time to be punched.

1. Navigate to RP>Payroll Users and Groups>Payroll Groups.
2. Select the specific Payroll Group.



3. Select the Settings tab.
4. Check Punch Clock. **Note:** Attendance Punch Clock and Attendance Punch Clock-Shift/Break Times are related to the legacy Attendance Punch Clock feature**.** A Payroll Group cannot have both Punch Clock and Attendance Punch Clock checked. It must be one or the other.

5. Select the Punch Clock tab.



6. Next, Apply Coding Defaults. These fields allow for default codes to be selected. Defaults can be set for the Pay Type, Job, Standard Cost Code, Standard Category, GL Account, and/or Department as needed. Once a default code has been selected, when an employee within the group punches in or out, they will be provided with the default code which can be overwritten to ensure accuracy. By selecting default codes, employees will not need to select repetitive codes each time they make a punch. For example, selecting Regular for the Pay Type coding selection will not be necessary upon punch. Enter the Pay Type, Job, and applicable Standard Cost Code, Standard Category, GL Account and Department, as needed.
7. Select Save Payroll Group Settings.
8. A message will indicate the Payroll Group defaults have been successfully saved.

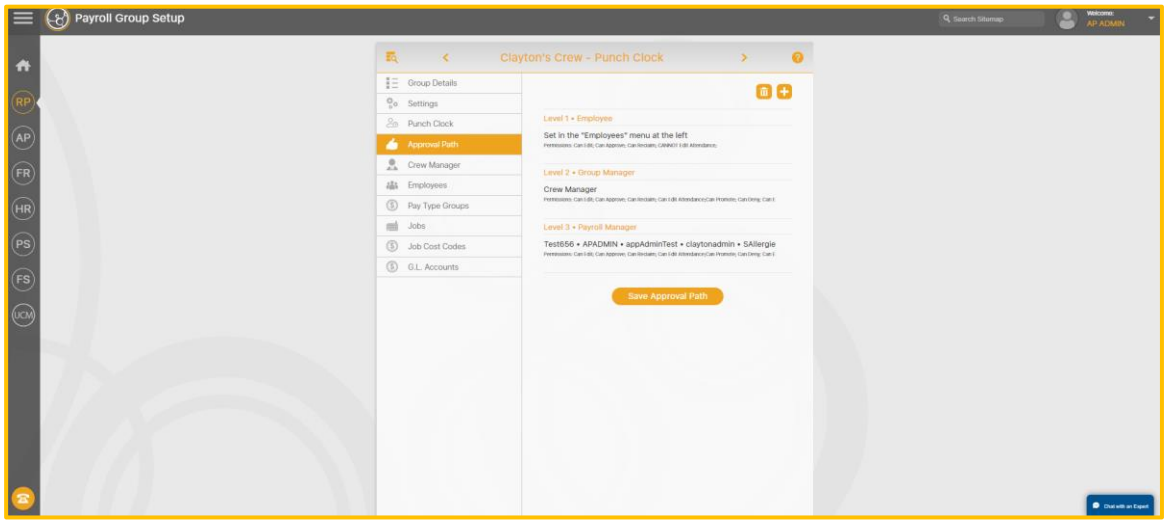
To Grant Punch Clock Permissions in the Approval Path for the Payroll Group:

This feature provides the ability to grant users within this group with various permissions pertaining to the Punch Clock and Time Approval systems. This includes or excludes users from the following abilities:

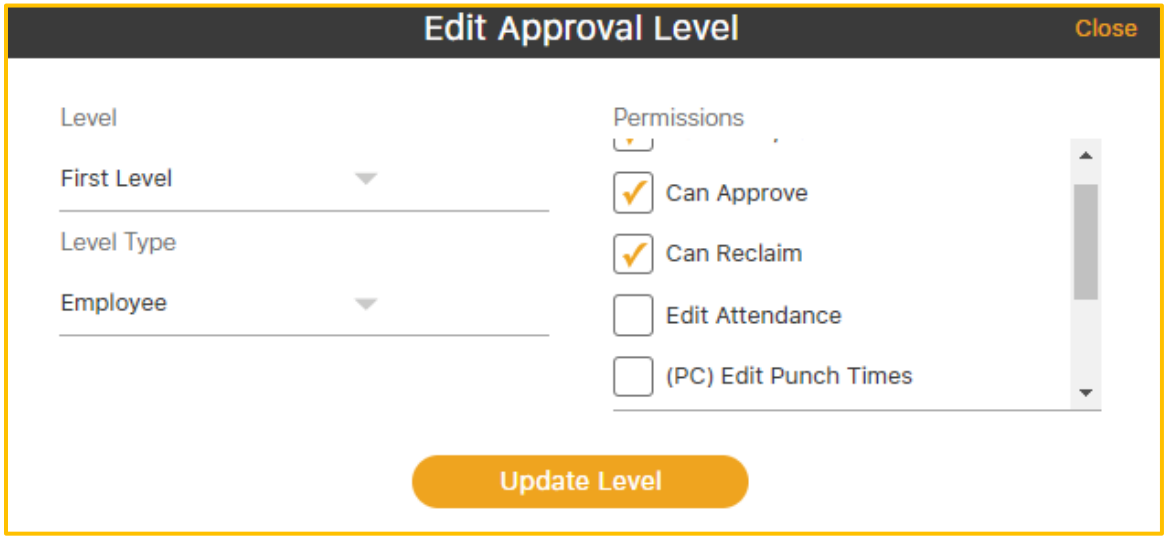
- Enter/Edit Time-for Non Punch Clock (not applicable here)
- Approve Time-for Non Punch Clock (not applicable here)
- Reclaim Time-for Non Punch Clock (not applicable here)
- Edit Attendance-for Non Punch Clock (not applicable here)
- (PC) Edit Punch Times-grants the ability to edit a punch's time and/or time zone
- (PC) Punch for Others-grants the ability to use kiosk mode within the mobile application and access the Crew Punch Page.
- (PC) Add Manual Punches-grants the ability to create punches manually rather than in the moment as a live punch.
- (PC) Edit Coding (allows changes to the coding, but not the time itself) ***PC** indicates Punch Clock Permissions versus time itself.

This feature offers the construction company a safety measure to ensure employees in the Approval Path cannot edit their own time. **Use Case:** To prevent an employee who arrived to work late from editing their own time.

1. Navigate to RP>Payroll Users and Groups>Payroll Groups
2. Select the specific Payroll Group
3. Select the Approval Path tab.



4. Click below the Job role in the Level where it says, Permissions…. This will take the user to the Edit Approval Level Page where permissions can be granted or revoked for users within the selected role.



5. Check the permissions to grant for this Level and Type (on the right).
6. The Level and Level Type fields are used when setting up a new approval level in an Approval Path. Those fields will already be set up prior to granting permissions.
7. Select Update Level.
8. Select the Approval Path tab in the Payroll Group and select Save Approval Path for the permissions to be saved. This MUST occur or the permissions will not be saved.

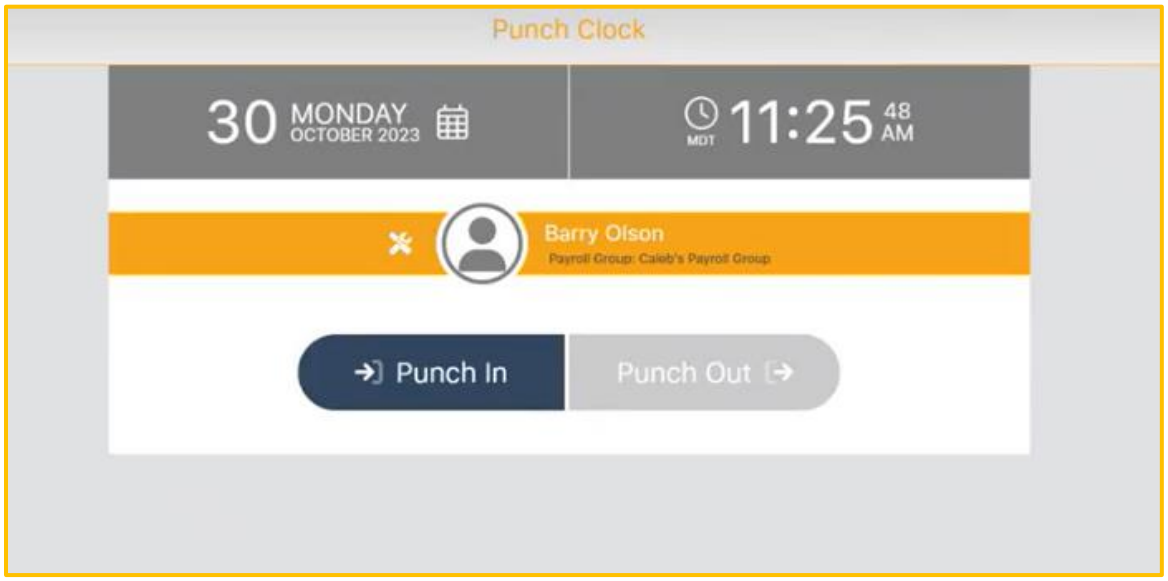
Note: User roles at the higher levels would benefit from having additional permissions, so those users, such as supervisors, have permission to edit punch time. When managers punch time for the employees or a group of employees it is referred to as Crew Punch Clock in hh2. See Crew Punch Clock.

Punching In and Out

Punching Time on the Punch Clock (by employee) on the Web

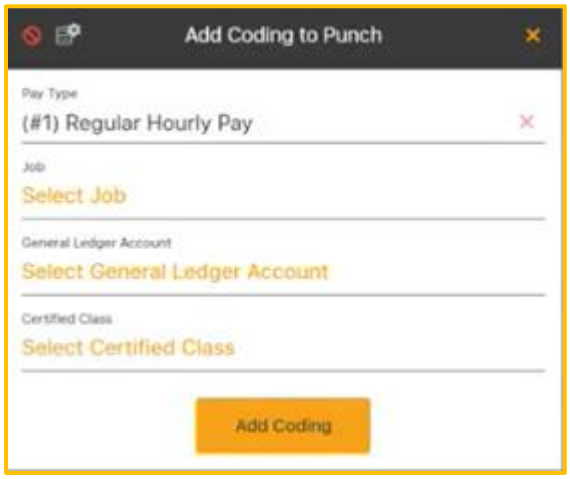
To Punch Time on the Web (by employee):

1. Navigate to RP>Punches and Attendance>Punch Clock.
2. The employee's name and default Payroll Group will be displayed on the Punch Clock. If an employee is part of more than one Payroll Group, they will need to select which Payroll Group to punch time. An employee cannot select another employee's name on Punch Clock. The current date and time will be displayed at the top of the Punch Clock.

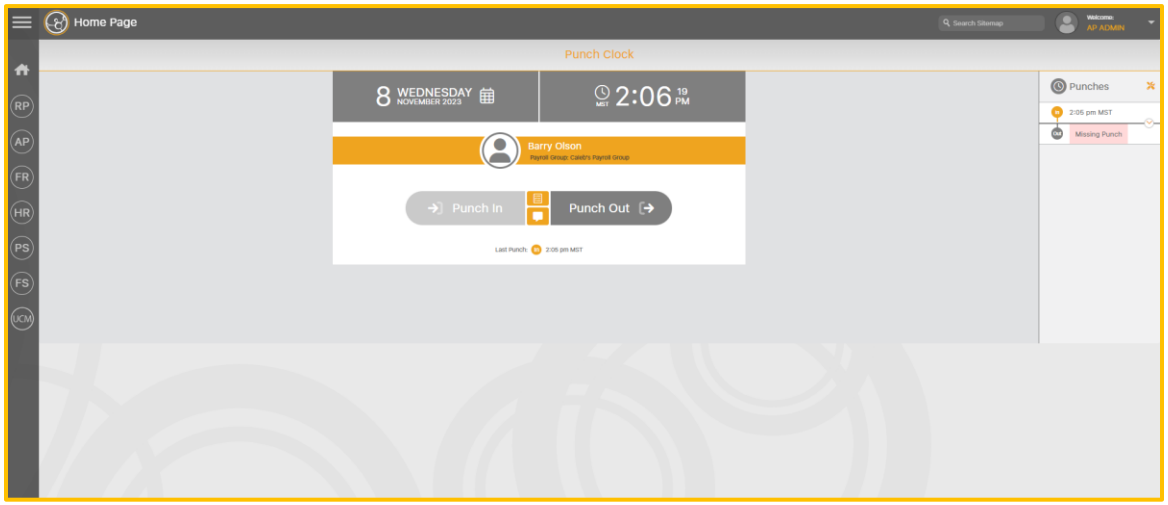


3. Select Punch In to punch in.

4. The Add Coding to Punch Page will display.



5. Select the appropriate coding on the Add Coding to Punch Page for Pay Type, and other coding enabled for the Payroll Group. **Note:** Pay Type will always be required, however other coding fields are dependent upon being enabled in the Payroll Group.
6. Select Add Coding.
7. A brief message displays indicating the Punch In was recorded.



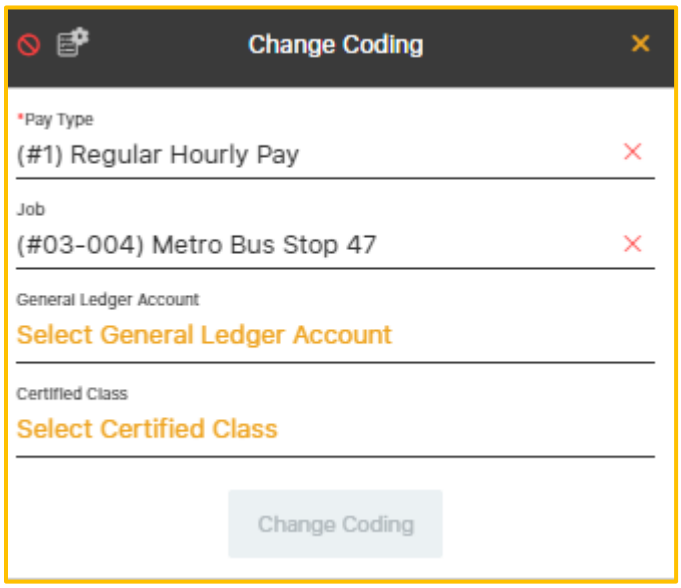
8. On the right, the punch displays. It also shows a missing punch, since the employee has not yet punched out for lunch or for the day. The Change Coding and Comments icons now appear.

Note: There must be a minimum of 60 seconds between the capturing of punches. If punches are made prior to that time, Punch In, Change Coding, and Punch Out will lock and remain locked until the 60 seconds have passed.

The Change Coding icon allows the employee to punch in a new set of coding. Upon performing Change Coding, the employee will be punched out of their current coding and punched into new coding provided the steps are correctly followed. Coding can only be edited during Punch In, not Punch Out. **Use Case:** An employee moves to a different job.

To Change Coding:

1. Select the Change Coding icon in the middle of the Punch Clock.

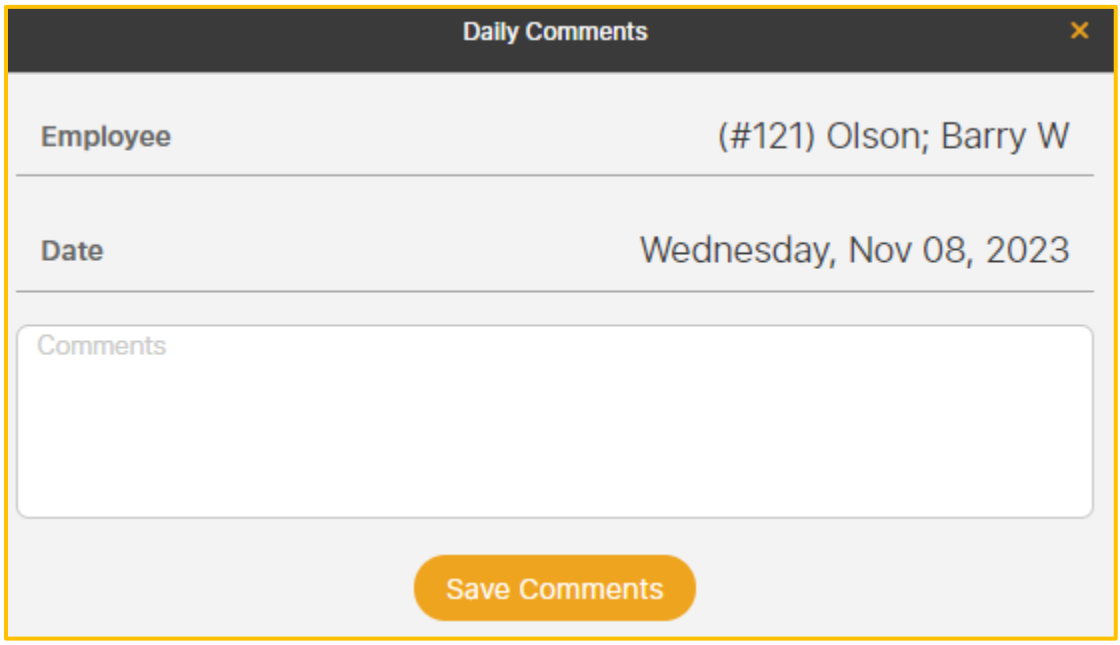


2. Select the new coding for each appropriate field.
3. Select Change Coding.

The Comments icon allows the employee to enter a comment about the day's events related to time. For instance, if the employee was late, or leaving for an appointment. **Note:** This same functionality is used on the Labor Time Sheet.

To Enter Comments:

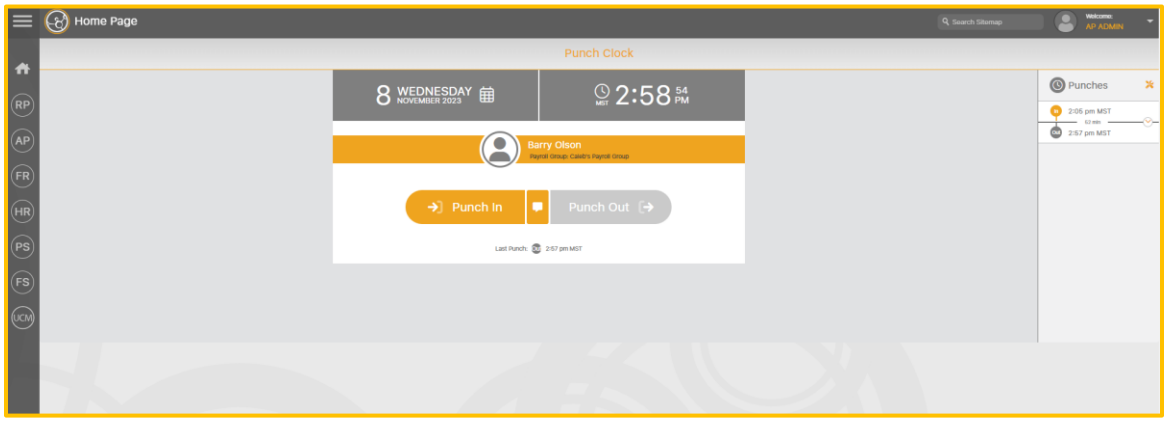
1. Select the Comments icon.



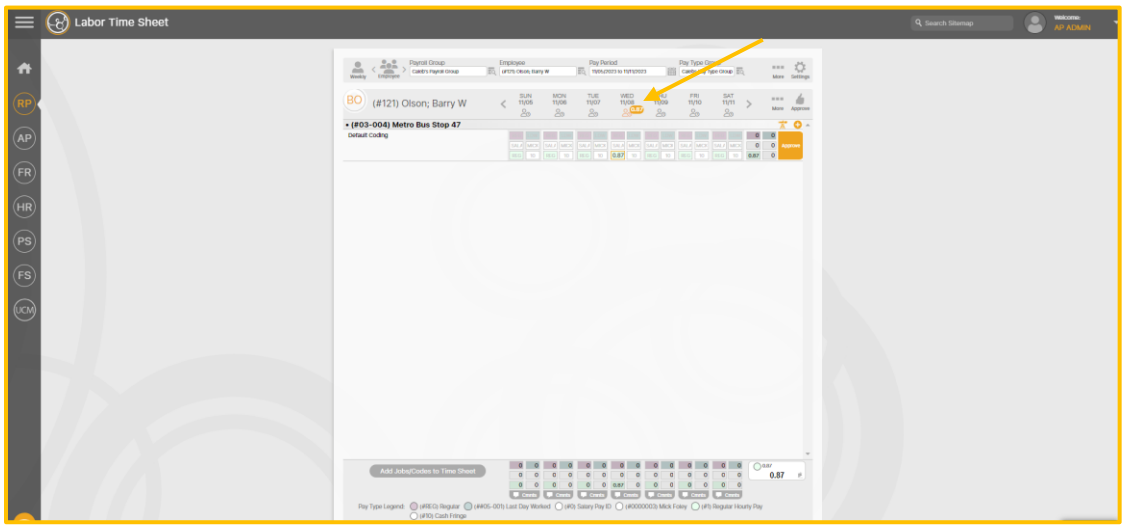
2. Enter the Comment
3. Select Save Comments.

To Punch Out:

1. Navigate to RP>Punches and Attendance>Punch Clock.
2. The employee's name and default Payroll Group will be displayed on the Punch Clock. If an employee is part of more than one Payroll Group, they will need to select which Payroll Group to punch time. An employee cannot select another employee's name on Punch Clock. The current date and time will be displayed at the top of the Punch Clock.



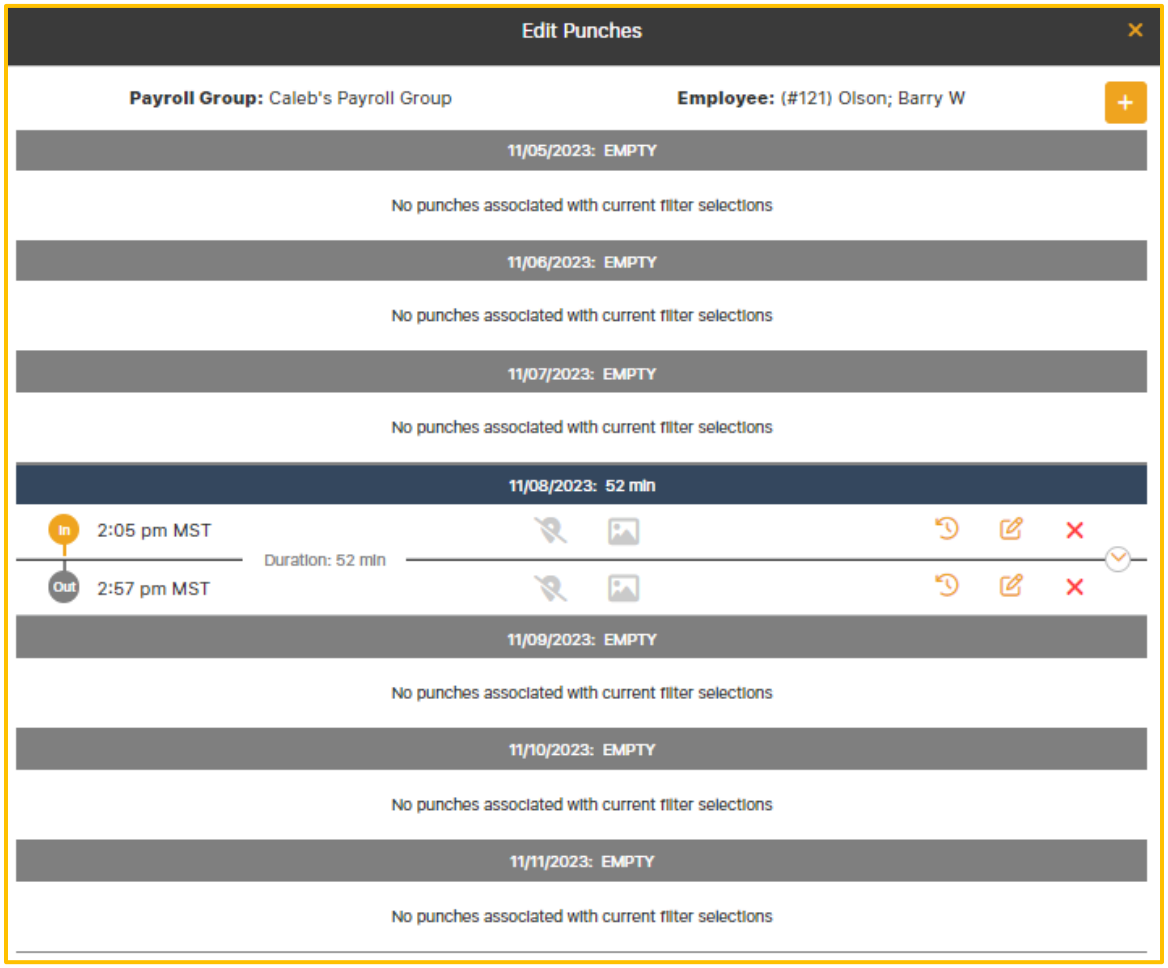
3. Select Punch Out.
4. The Punch Out time will display on the right side of the page.
5. Once a Punch In and Punch Out record has been captured, the interval of time between the two records will display on the Labor Time Sheet in either the Weekly or Daily View (RP>Track Labor Time>Time Sheet>specific Payroll Group>specific employee. **Note:** The total punch interval will be displayed near the date (Weekly View) or name (Daily View) at the top in color.



The Edit Punches Page

When the total Punch Clock Units (displayed in color) are selected from the Labor Time Sheet (RP>Track Labor Time>Time Sheet), the Edit Punches Page will open. This page shows each punch record and interval duration captured for the selected week.

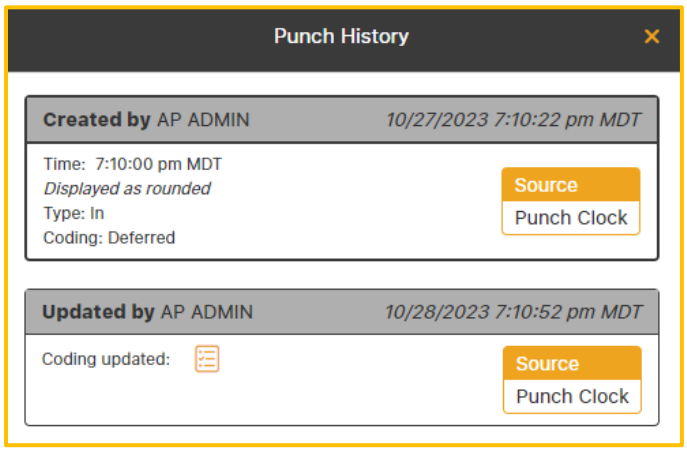
Within the Edit Punch Page, the user can view a punch record's history, edit a punch record's time or coding, delete a punch record, or manually add missing punch records.



Note: This page may also be accessed from the Labor Time Approval Page, using the Attendance icon.

To View the Time Punch History:

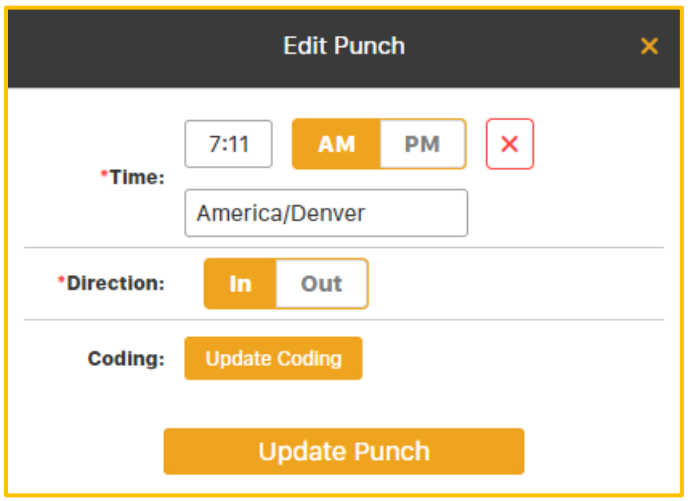
1. Select the History icon from the Edit Punches Page.



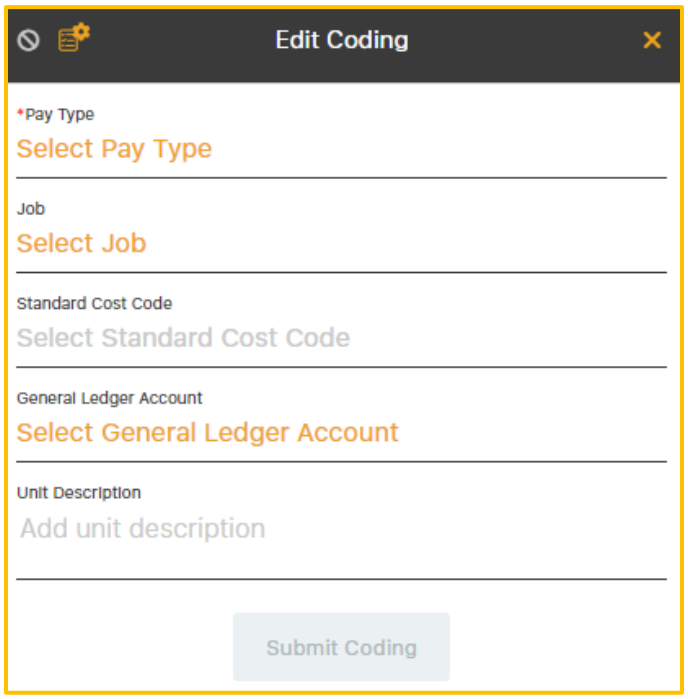
2. The Punch History displays. **Note:** Each historical step will display the user who performed the action, the date and time the action occurred, and where the action was performed. Additional details regarding the action, such as the manner in which the coding occurred are also available.

To Edit Punch Information:

1. Select the Edit icon from the Edit Punches Page.



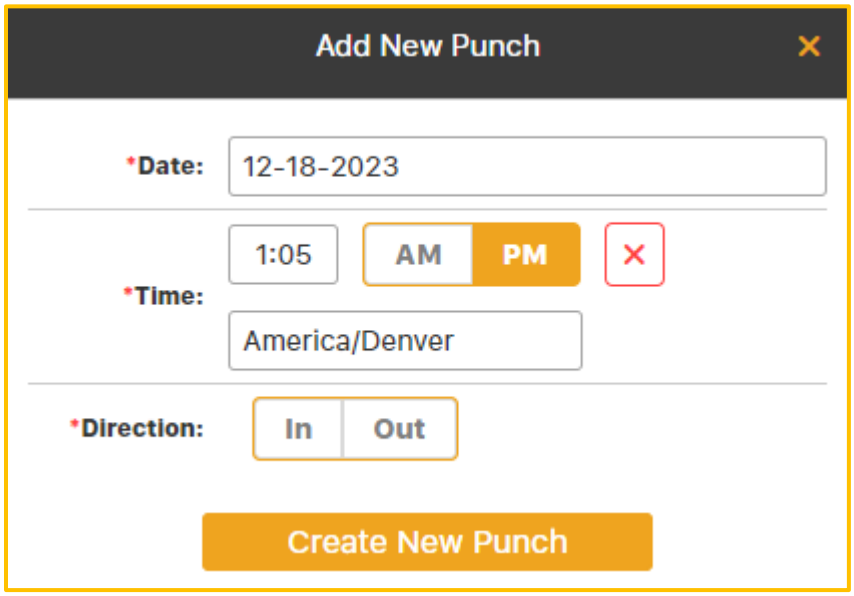
2. Click on the appropriate field(s) to edit and make modifications. **Note:** When the Direction (In) is selected with a click, the user can update coding by selecting Update Coding on the Edit Punch Page. When Update Coding is selected, the Edit Coding Page then displays.



3. To update coding, make the appropriate selections on the Edit Coding Page and select Submit Coding. Otherwise, select Update Punch from the Edit Punch Page.
4. The Time Punch will update.

To Add Missing Time:

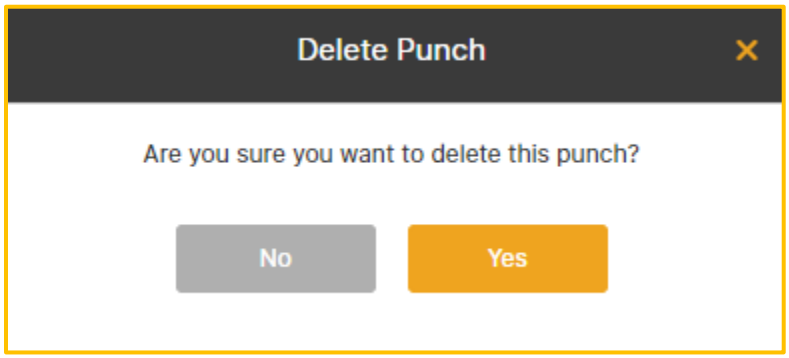
1. When time is missing from a Time Punch, the Add + icon will display on the Edit Punches Page.
2. Select the Add + icon.



3. Select the Date.
4. Enter the time on the Add New Punch Page.
5. Select the Direction.
6. Select Create New Punch.
7. Select Coding to the punch on the Add Coding to Punch Page.
8. Select Add Coding.
9. The punch will appear on the Labor Time Sheet once a punch in and out interval occurs.

To Delete a Punch:

1. Select the **X** next to the Time Punch on the Edit Punches Page.



2. Select Yes.
3. The time will be removed from the Labor Time Sheet.

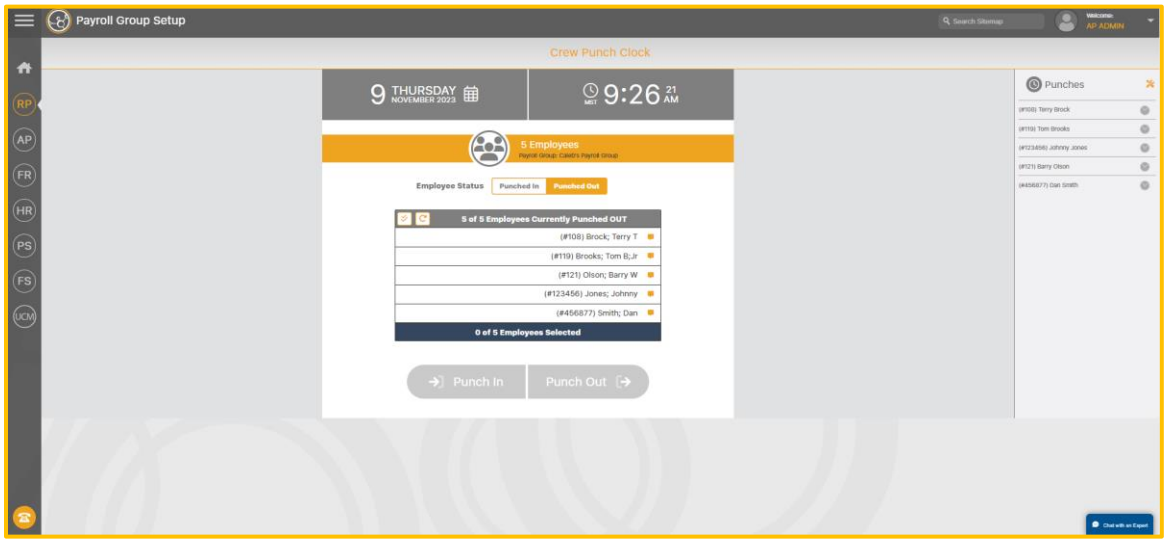
Note: The Punch Clock feature captures the coding information on the Labor Time Sheet. Whereas the legacy Attendance Punch Clock product does not capture coding information and it will need to be allocated to the proper job and cost code manually on the Labor Time Sheet. Attendance Punch Clock is simply punching time in and out.

Crew Punch Clock

A field manager typically uses Crew Punch to punch time for a group of employees. The manager can select which Payroll Group to punch time for and has the capability to punch all employees within a Payroll Group at once. Managers may also deselect employees that are not in attendance prior to punching the Payroll Group's time. Managers also have the flexibility to punch employees into different jobs, pay types, general ledger accounts and certified classes (if applicable).

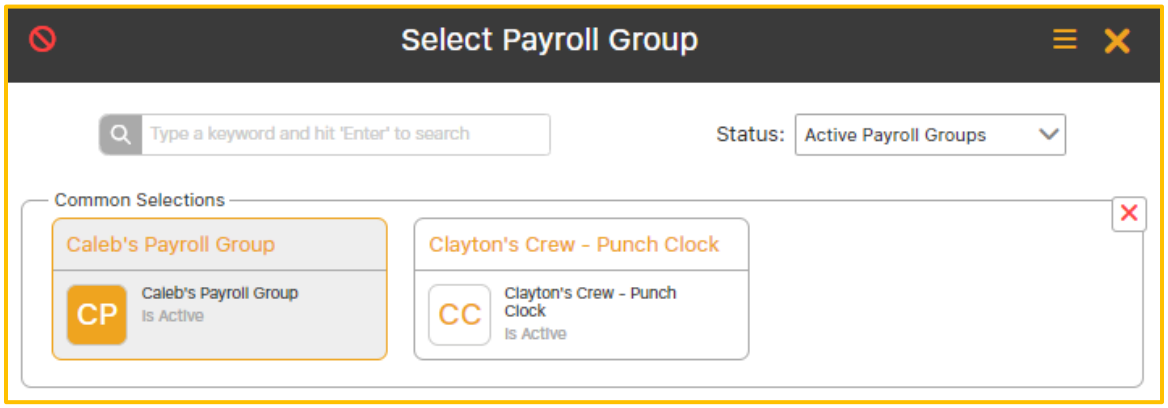
Navigation: RP>Punches and Attendance>Crew Punch Clock

When the Manager navigates to the Crew Punch Clock, this is how the Crew Punch Clock Page will appear prior to punching time for the Payroll Group.

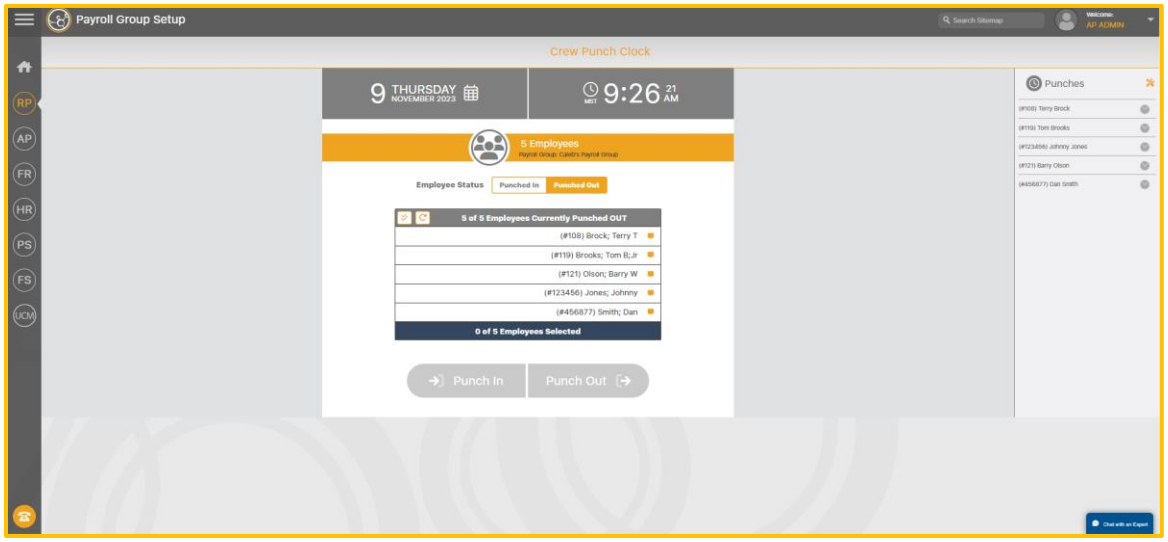


To Punch a Payroll Group In:

1. Navigate to RP>Punches and Attendance>Crew Punch Clock.
2. Click on the Payroll Group.
3. Select the Payroll Group.



4. The employees for that Payroll Group will load on the Crew Punch Clock.

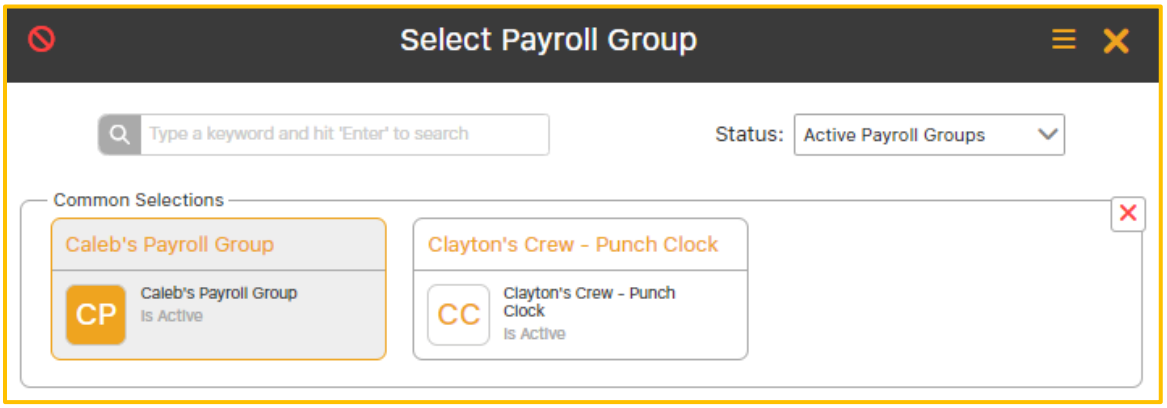


5. The Punched Out status tab will be automatically selected. This tab displays all employees currently Punched Out and awaiting to be Punched In.
6. Select <u>all</u> Employees with the Select All icon. The Punched Out status tab will be automatically selected.
7. Select Punch In. This will Punch In all employees that were selected. Punches will be displayed on the right hand portion of the page. The downward arrow adjacent to the employee's name allows the user to view the punches in greater detail.

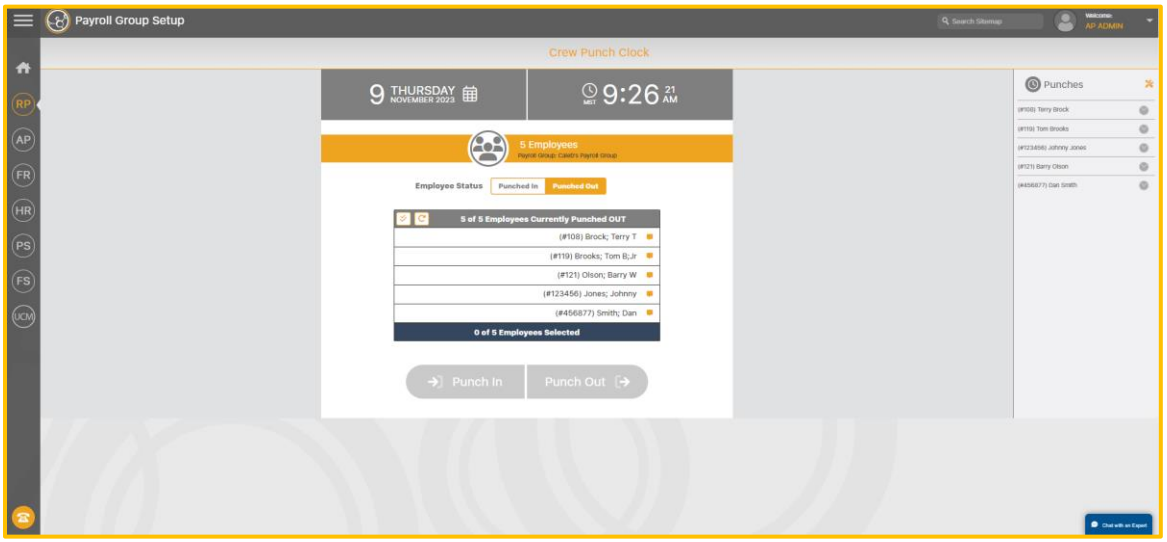
Note: Use the Deselect icon, to deselect all employees in the Payroll Group. Managers may also select certain employees, with a click. The employee's line item will display in white. To deselect an employee, click on the employee again. Their line items will now be displayed in green. Users can toggle Punch In/Punched Out adjacent to Employee Status to view employees that are Punched In versus Punched Out.

To Punch One or Several Employees to a Different Job, Cost Code, Pay Type, GL Account or Certified Class:

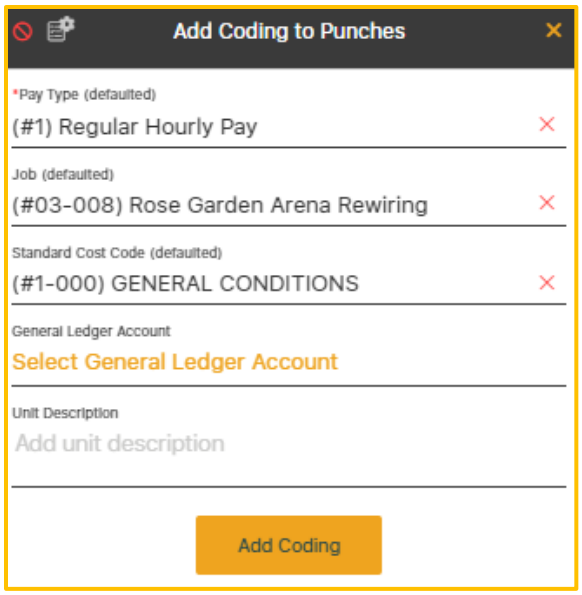
1. Navigate to RP>Punches and Attendance>Crew Punch Clock.
2. Click on the Payroll Group.
3. Select the Payroll Group from the Select Payroll Group Page.



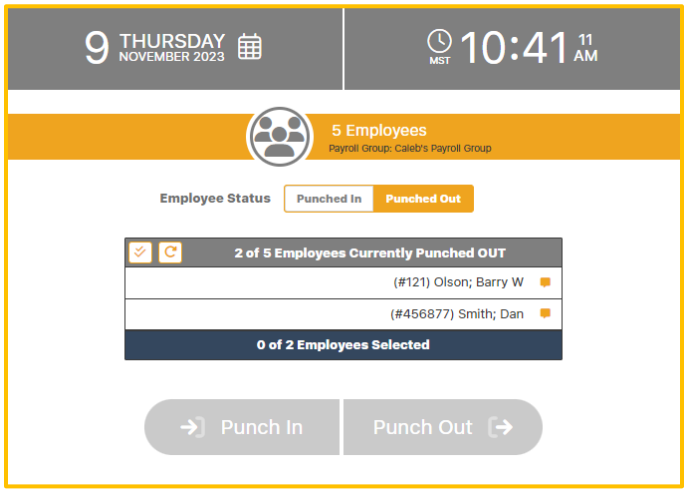
4. The employees for that Payroll Group will load on the Crew Punch Clock.



5. Select all Employees with the Select All icon.
6. Click on the employee(s) that will require changes to Job, Cost Code, Pay Type, GL Account or Certified Class. This will deselect them and their line item will display in white. Whereas the remaining selected employees will display in green.
7. Select Punch In to punch the selected employees (in green). The Add Coding to Punches Page will display.



9. Enter the necessary information.
10. Select Add Coding.

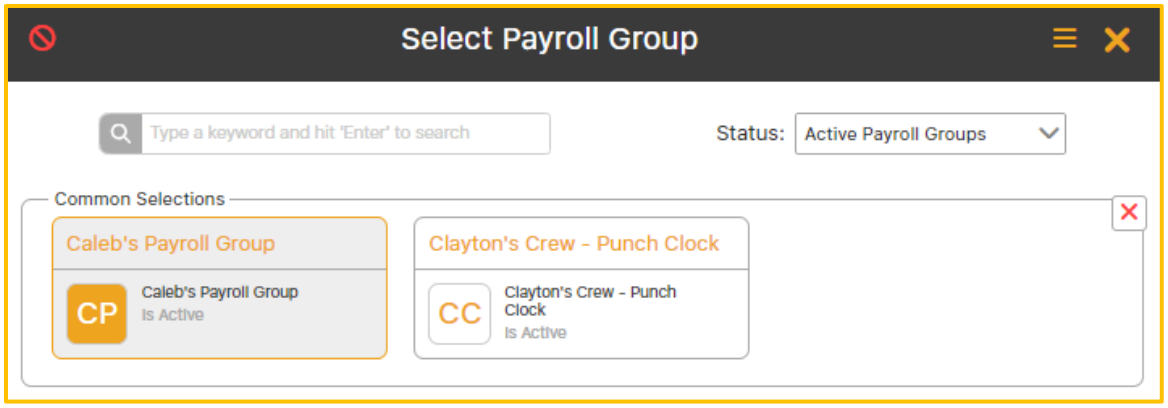


11. For the deselected employee(s) (in white), the manager may select one employee at a time or all at once with a click. The click will cause the employee to be selected and will be displayed in green.
12. Select Punch In.
13. Modify the Pay Type, Job, Cost Code, General Ledger Account or Certified Class fields as needed. The **X** will deselect unnecessary fields.
14. Select Add Coding.

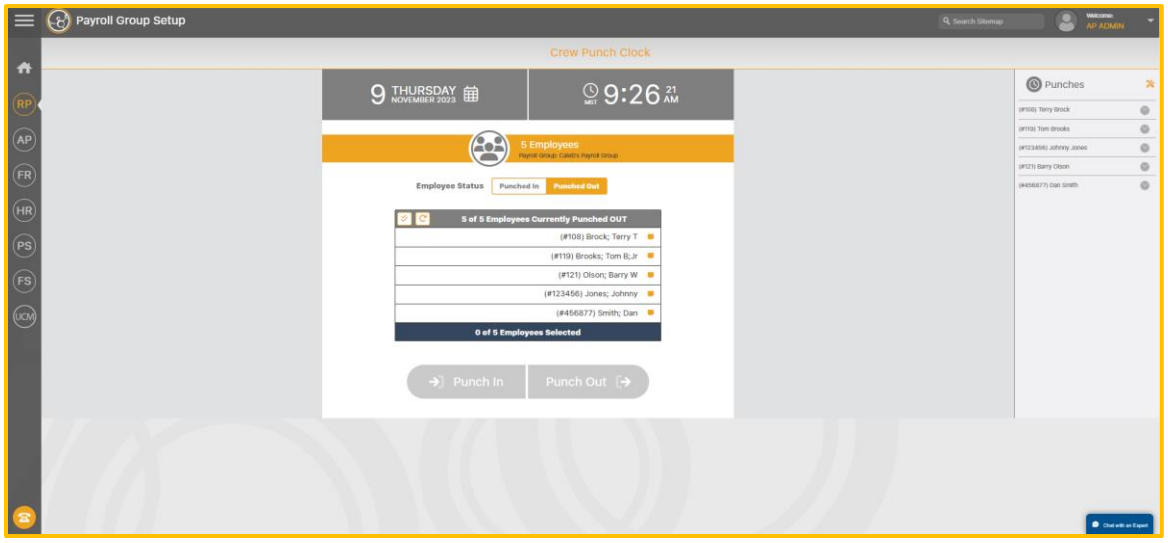
Note: When on the Punch In status, a new icon will appear between Punch In and Punch Out. This will also open the Add Coding to Punches Page. However, upon clicking the Add Coding icon, all selected employees will be punched out from their old coding (such as Job and Cost Code for instance) and punch them into their new coding.

To Punch Out:

1. Navigate to RP>Punches and Attendance>Crew Punch Clock.
2. Click on the Payroll Group.
3. Select the Payroll Group.



4. The employees for that Payroll Group will load on the Crew Punch Clock. If not, toggle to the Employee Status of Punched In.

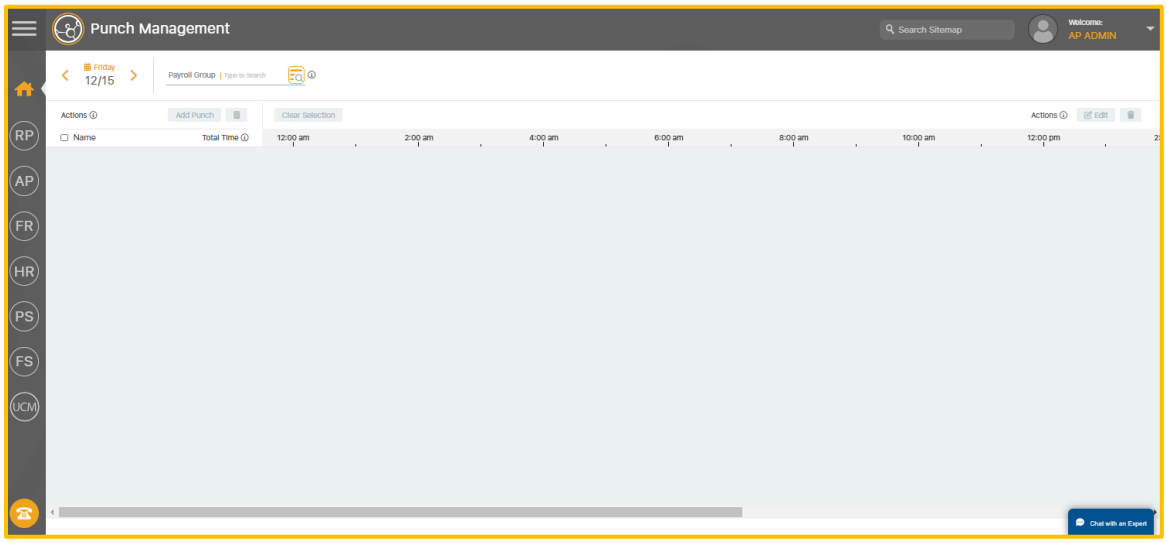


5. Select all Employees with the Select All icon.
6. Select Punch Out. Just like Punch In, employees may be deselected with a click. This will cause their line items to display in white and exclude them from the Punch Out.

Punch Management

The purpose of the Punch Management Page is designed for Payroll Managers who want to add and/or edit multiple employee punches at one time (in bulk). **Use Case:** There are ten employees who forgot to punch out and the Payroll Manager needs to punch them out.

Navigation: RP>Punches and Attendance>Punch Management



Punch Management System Setup and Configuration

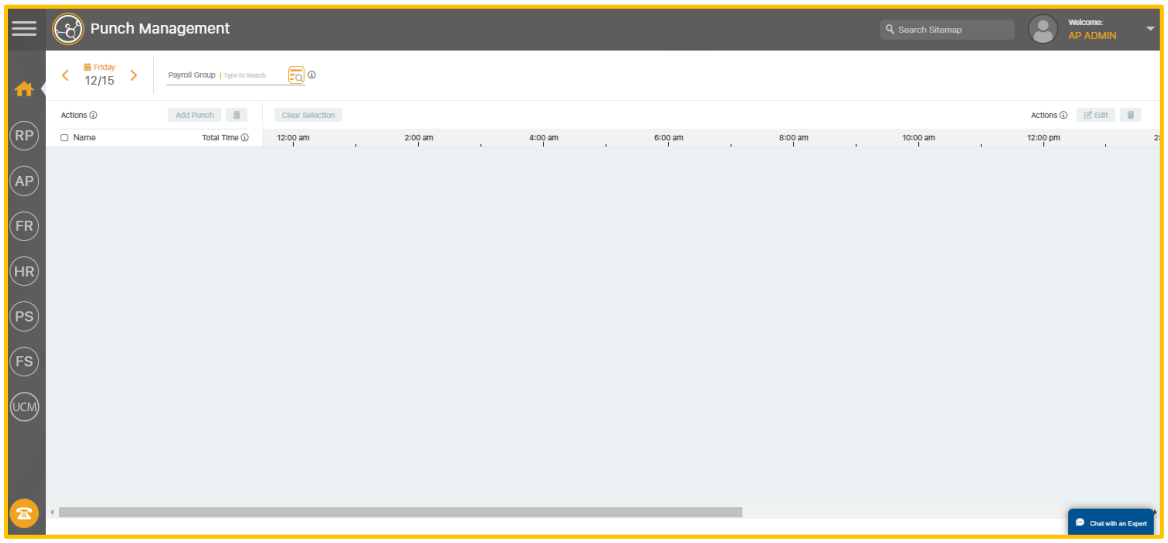
Two settings must be selected to enable Punch Management:

Note: These settings must be enabled by the hh2 Administrator.

1. Punch Clock must be enabled in the RP>Settings>System Settings. See To Enable the Punch Clock the Punch Clock Feature.
2. Home Page>Set Up>System Settings>Feature Flags>Check Punch Management.

The Punch Management Page

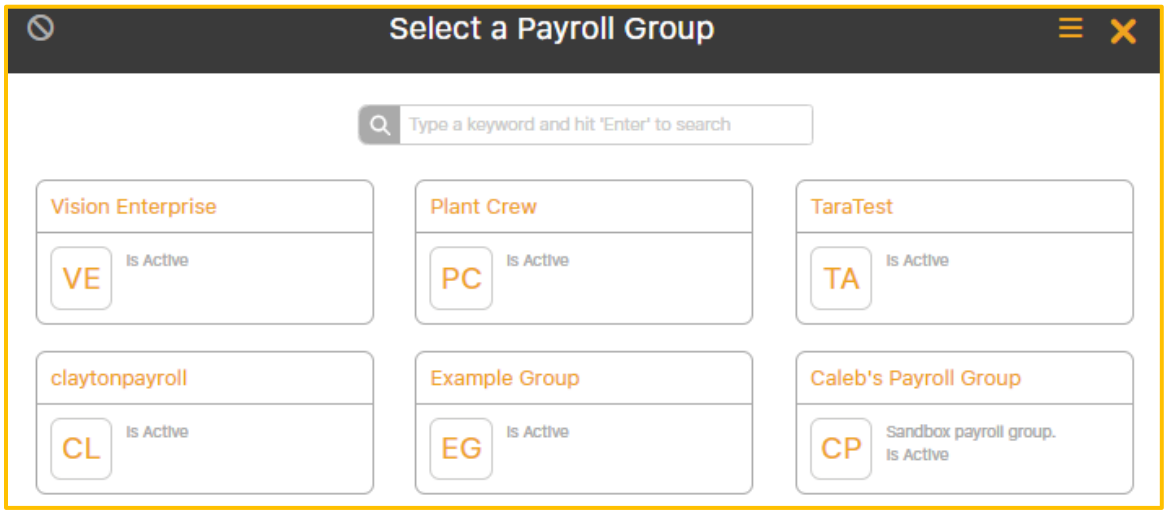
Navigate to RP>Punches and Attendance>Punch Management.



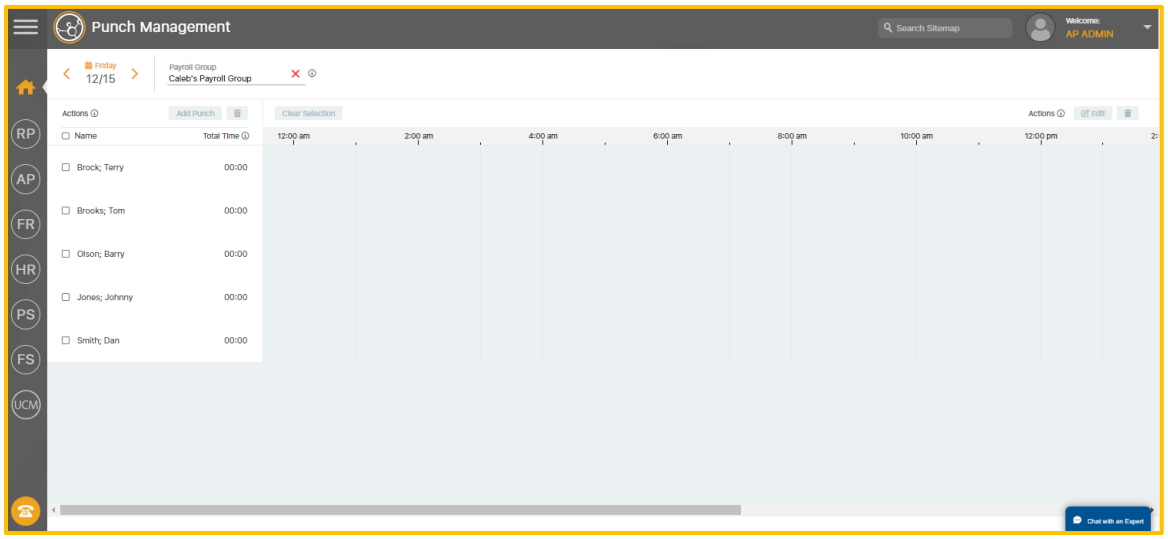
- Punch Management is designed for users to work with either employees or punch intervals, but not both at once.
- The Action bars on the left (Add Punch, Delete) represent Action bars for employees, while the Action bars on the right (Edit and Delete) represent Action bars for time intervals.
- Total time is next to each employee's name. Zero next to an employee's name indicates the punch interval has not yet been completed.
- Time intervals may be selected with a left click and deselected by clicking again.
- Use Clear Selection to unselect all.
- The Date Field in the upper left corner allows the user to select a month by clicking the date. Or using < and > the user may toggle with back or forward with individual dates.

Using the Punch Page

1. From the Payroll Group field, select a Payroll Group by clicking on Magnifying icon.

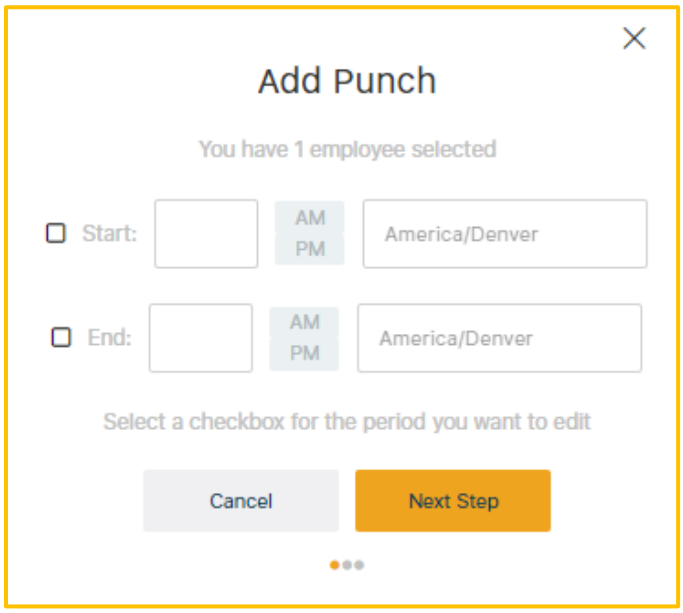


2. Select the Payroll Group.
3. The employees for that Payroll Group will be displayed on the Punch Management Page.

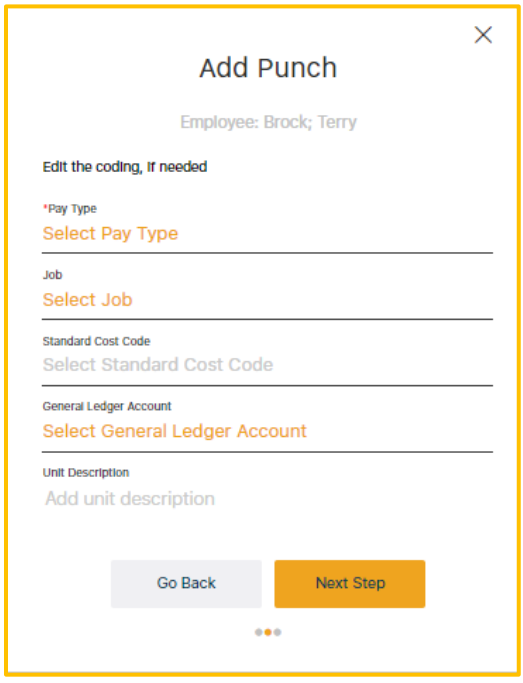


To Add a Punch:

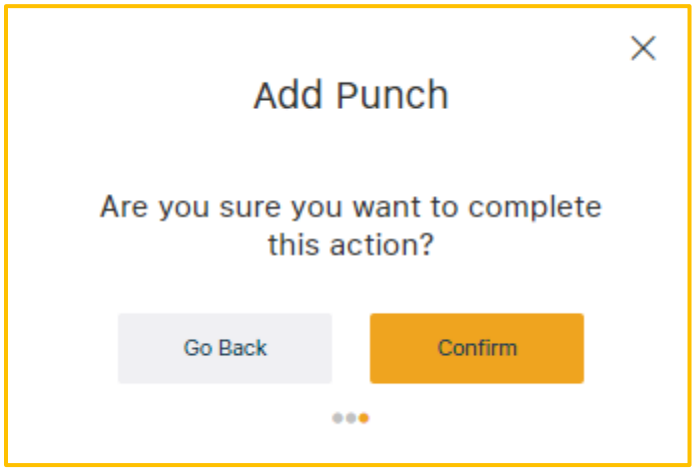
1. Select an employee or multiple employees by checking the box next to their name, or all employees by checking the box next to Name.
2. Add Punch and Delete will highlight on the left side of the Punch Management Page.
3. Select Add Punch.



4. Check the Start and/or End box(es). Enter Time Intervals, as needed.
5. Select AM or PM.
6. Select Next Step.



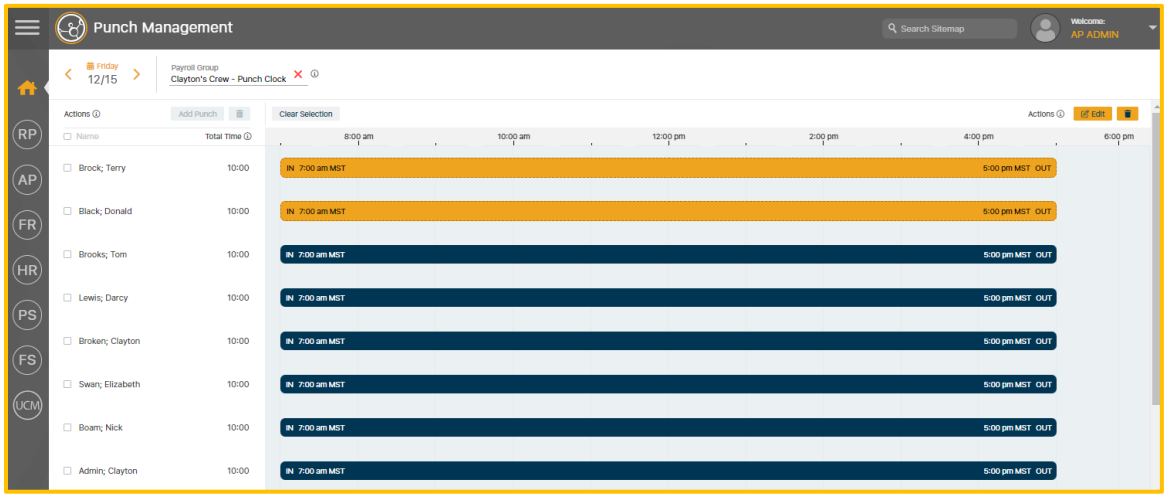
7. Enter Coding.
8. Select Next Step.



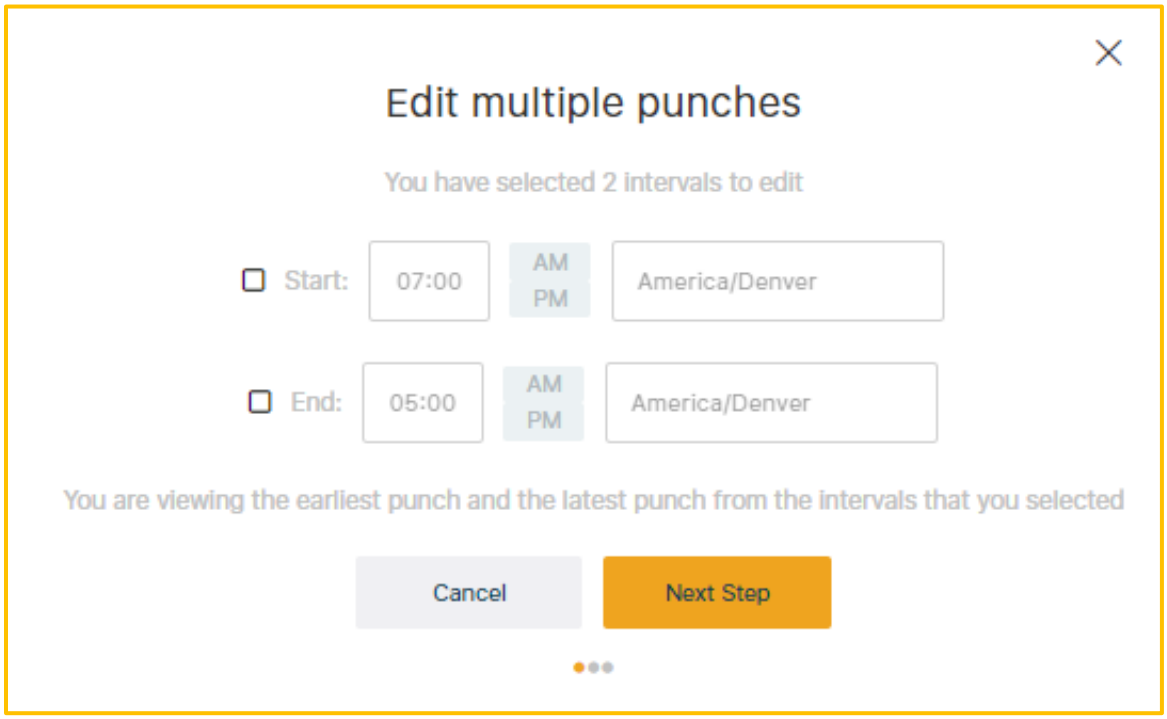
9. Select Confirm.
10. The Time Interval for the employee(s) will be displayed on the Punch Management Page.

To Edit Time Intervals:

1. One or more Time Intervals may be edited at once. However, the primary purpose of Punch Management is to work with punches in bulk.
2. Select the Time Intervals to edit with a click. They will display in orange. A double click will immediately display the Edit Multiple Punches Page.

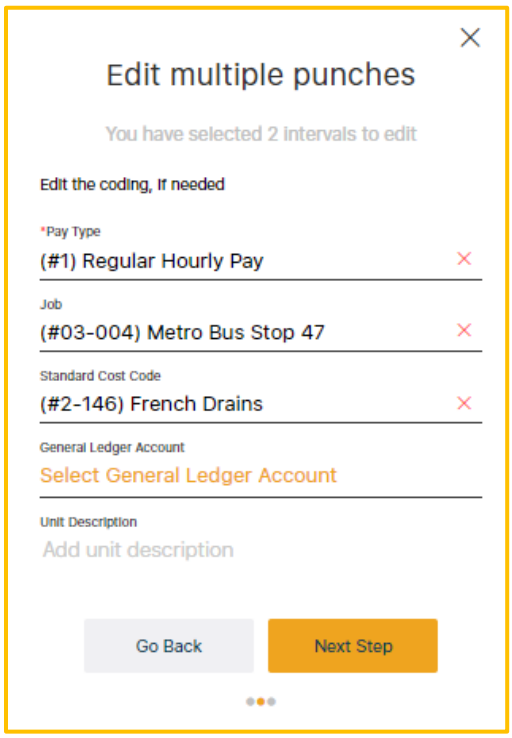


3. Edit and Delete on the right side will highlight.
4. Select Edit.

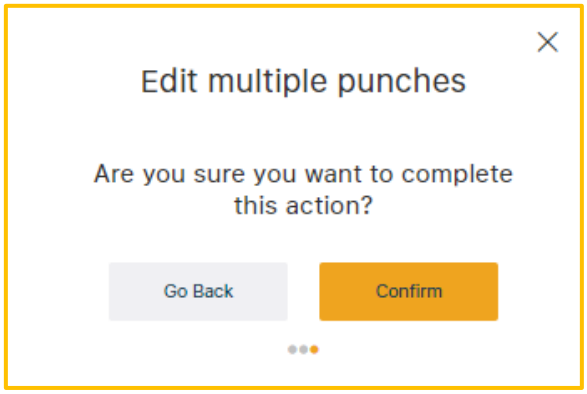


Note: If there is a range of punches, the earliest and latest punch interval times will display if there are multiple punches selected.

5. Check the Start and End Time boxes, make necessary modifications to time, select AM or PM, then select Next Step. If edits need to be made to coding, select Next Step.



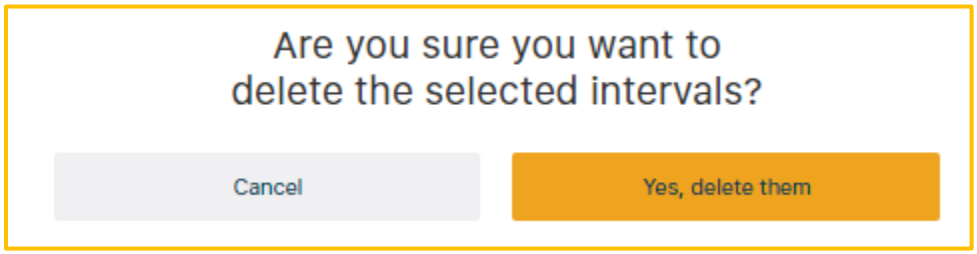
6. Modify coding as needed**.** Click the associated coding field to change the coding. **Note:** If punches are on <u>different</u> Jobs, *"Preserve Current Value"* will be displayed in the Job field. When Next Step is selected the current (different) Jobs will be preserved. Or Jobs may be changed by clicking on the Job field.
7. Select Next Step.



8. Select Confirm.

To Delete Punches:

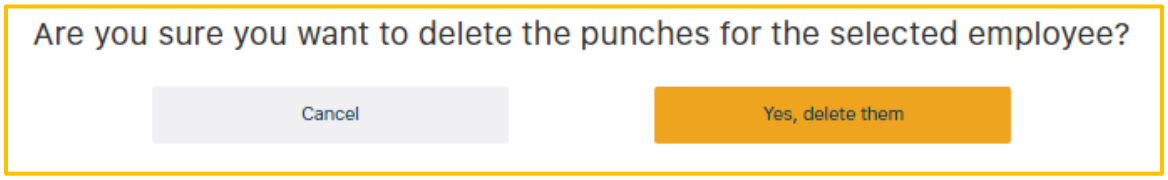
1. Unselect any employees with Clear Selection.
2. Select the Time Intervals to delete with a click.
3. Select Delete in the upper right corner.



4. Select Yes, delete them.
5. The Time Intervals will be deleted and the Total Time next to the employee(s)'s whose intervals were deleted will read zero.

To Delete All Punches for a Single Employee:

1. Clear Selection.
2. Add Punch and Delete will highlight in the column above the employee list.



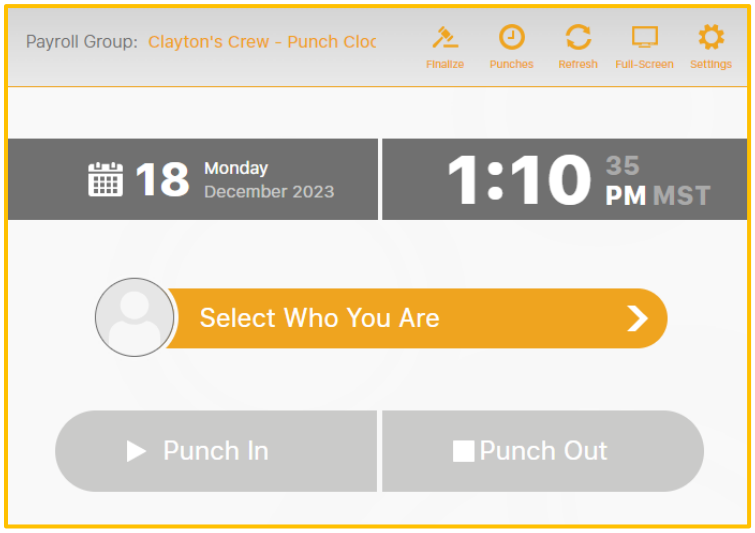
3. Select Delete.
4. Select Yes, delete them.
5. All Time Intervals for the selected employee(s) will be deleted.

Punch Card Summary: Once a complete punch interval is made through the capturing of a Punch In and Punch Out record with coding via the Punch Clock or Crew Punch, the interval of time will automatically be entered on the employee's Labor Time Sheet and move through the designated Approval Path for the Payroll Group. Time can be reviewed, like time entered via any other means on the Labor Time Approval Page by the Payroll Manager. It is then ultimately exported to the accounting system.

Attendance Punch Clock

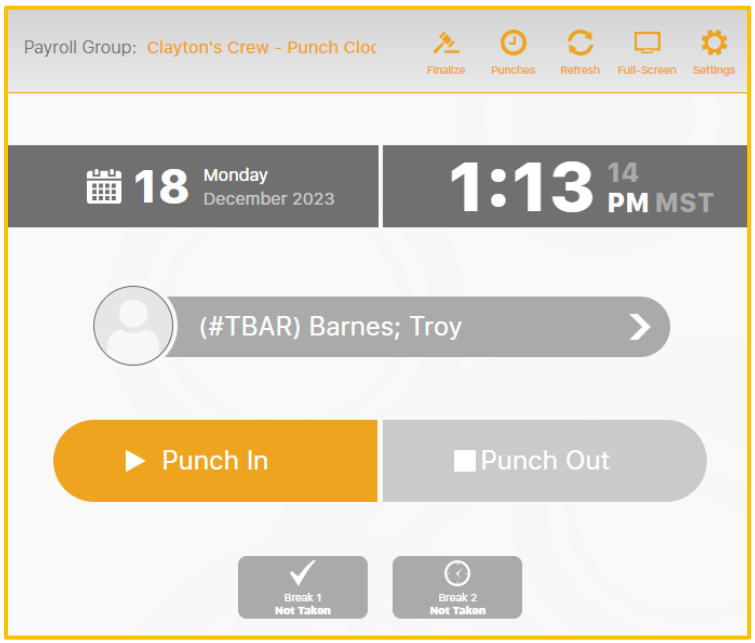
This feature allows for geo-fencing but does not capture any coding. This feature provides the construction company with the ability to only have employees punch time in and out. Attendance Punch Clock is not to be confused with the Punch Clock feature which does capture coding information. Attendance Punch Clock time captures time for a Payroll Manager or Administrator to view.

Navigation: RP>Punches and Attendance>Attendance Punch Clock.



To Punch In or Out Using the Attendance Punch Clock:

1. Select the Employee Name from Select Who You Are.

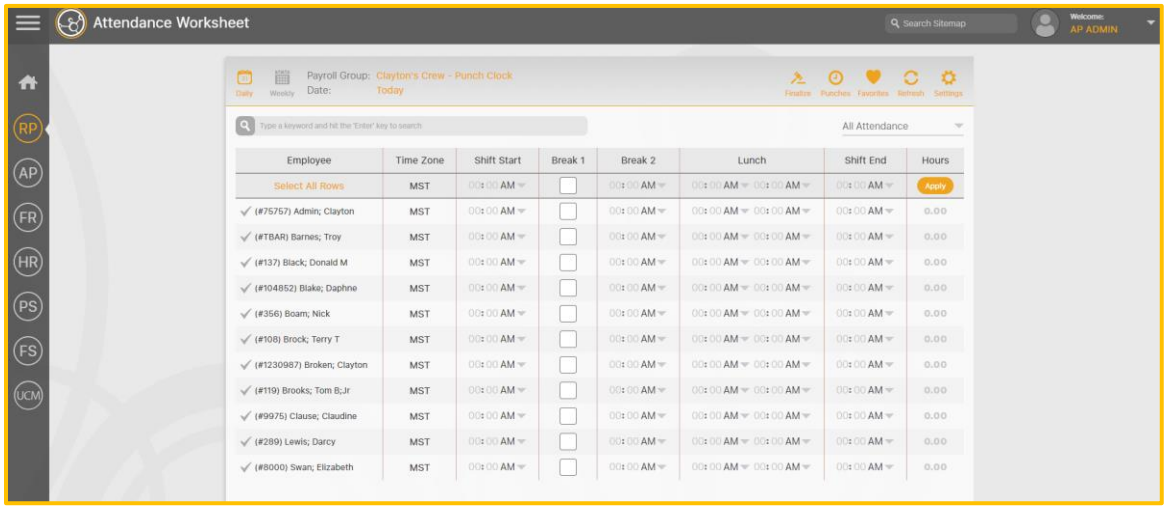


2. Select Punch In and Punch Out.
3. Breaks may be selected.
4. Notice there is no coding.

Attendance Worksheet

The Attendance Worksheet is designed for batch entry of time using the Attendance Punch Clock feature. A manager can add or edit punches in bulk.

Navigation: RP>Punches and Attendance>Attendance Worksheet.



To Add Time in Batch:

1. Select the Payroll Group.
2. Select the Date.
3. Select the Employees add time to either with a click or Select All Rows, when adding time to all employees.
4. Enter the Shift Star time, check for Breaks, select Lunch start and end and select Shift End time. Tab to each field.
5. Select Apply to apply time to the employees selected.
6. The percentage of hours is the percentage of employees selected within the Payroll Group.

Notes:

- The **Finalize**

icon will commit the time to Payroll Time.
- The **Punches**

icon allows the user to view and edit punches.
- The **Favorites**

icon will remember the current batch values as defaults.
- The **Settings**
icon will set Punch Clock settings for the user.

Mobile Apps

The hh2 RP mobile app can be downloaded for Apple iOS iPhone and iPad, as well as the Android Phone and tablet. Field users typically use the mobile application. See the RP Mobile App User Guide for Field Users.

Summary

The hh2 Remote Payroll system is structured around a streamlined four-step process. It begins with field users entering their time through a user-friendly web interface or a dedicated mobile application. Following this, a meticulously designed workflow initiates, involving approval from designated members of the Approval Path for the Payroll Group. The process advances with a comprehensive review and final approval conducted by the Payroll Manager. Ultimately, the approved time seamlessly integrates into the accounting system, marking the completion of the process. The Remote Payroll module is versatile, accommodating both non-punch time and punched time, with the added functionality to track equipment time effectively.

Please feel free to submit any comments, or issues regarding this documentation to documentation@hh2.com

Glossary of Terms

Note: This includes terminology for all hh2 modules as well as some industry language.

AB Locations: This term is utilized in the hh2 HR module. AB (Address Book) Locations can be used to assign an employee to a particular location. For instance, a home office or state location.

Acceptance Group: In the document Acceptance step in the Document Flow (AP) module, multiple Acceptance Groups can be set up so that larger companies can divide new invoices into groups for more orderly processes. This is frequently done when the company has multiple physical office locations, multiple business entities, or multiple divisions within the company. Using Acceptance Groups, AP Clerks can process invoices for their own office, entity, or division and not get documents outside their jurisdiction.

Accounting System: For the purposes of this document, the accounting system is the construction company's Enterprise Resource Planning System. See ERP.

Accrual: This term is used in the HR, Remote Payroll and Pay Stubs modules. It refers to the accumulation or gradual increase of benefits or earned time off over a specific period, typically based on the length of an employee's service or time worked.

Admin or Administrator: An employee at a construction company that has a high level of permissions within the hh2 system. This individual can create users and set permissions for users. Likewise, this individual can configure certain portions of the hh2 system. This person is different from both the hh2 Admin and the System Administrator. See hh2 Admin.

AP Clerk: An AP Clerk is a user at the construction company that has permissions to perform some aspect of the invoice processing within hh2 Document Flow. Permissions can be set up to allow or deny AP Clerks access to portions of the software. This allows hh2 customers to configure AP Clerk permissions around their unique needs.

AP Group: This term is used in the Document Flow module. AP Groups are set up so that users can be given permissions based on the roles that they fill within the company. For example, an hh2 customer might set up a Field Supervision group and add all foremen and superintendents to it, so they only need to grant access to the accounting codes once.

AP Manager: This individual is someone at the construction company that has high levels of access and permissions within hh2 Document Flow. They oversee the processes of managing recipients, reimbursements, and invoices.

AP Page: This is the landing page of the hh2 system's Document Flow (AP Module). The AP Page is where the user can access features and functionality of the Document Flow Module. Each user's AP landing page will display based on the permissions granted to them**. Note:** The terms AP and Document Flow are used interchangeably within the hh2 system. See Document Flow.

Approval Path: In the Remote Payroll module, the Approval Path is configured based on the construction company's needs and preferences, dictating the flow of time approval. The Approval Path can be established according to employee levels, group manager roles, or job manager roles. It is also structured in levels.

Attendance Punch Clock: In the Remote Payroll module, the Attendance Punch Clock captures time for Payroll Managers or Administrators to review. Coding is not captured with this feature. This should not be confused with the Punch Clock feature, which does capture coding.

Bank: The Financial Institution the construction company processes their credit card transactions through

Batch: Processing more than one piece of data at a time. This term typically refers to large numbers of invoices, receipts, or other financial instruments and time managed by hh2.

Cardholder: This term is used in the Document Flow (AP) module. This is the individual whom the credit card is assigned to in the Document Flow User Setup. This is also the person using the credit card for purchases, and who will upload the credit card receipts into hh2. **Note:** AP Administrators and AP Managers may also upload credit card receipts for the cardholder.

Categories: Some accounting systems have a customizable layer between Cost Codes and Cost Types. This enables a contractor to distinguish between multiple categories of the same Cost Type. For example, there might be two labor categories that accumulate to the Labor Cost Type, one for regular labor, one for overtime. A Contractor may budget for this ahead of time if they know the job will be on a tight deadline.

Certified Work: Work that the government guarantees an assured wage for certain types of work (by Certified Class) for government Jobs. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include Davis Bacon or Prevailing Wage Work.

Child: In construction and business, structures often follow a hierarchical format, which means they are organized in a clear and structured manner with parent and child relationships. In the business realm, this can be observed in the presence of subsidiary companies operating under a larger parent company. Similarly, in data management, certain abstract concepts are categorized as child entities under a larger entity. For example, in construction projects, Extras or Sub Jobs can be considered as child entities of a more comprehensive Job. Furthermore, Cost Codes may serve as child entities tied to the specific Job. The term "Parent" is used to denote the larger, overarching entity in these hierarchical structures. Also see Parent.

Commitment: In hh2, this term is often used interchangeably with "Purchase Order." It is an official document issued by a General Contractor to a Subcontractor or Supplier outlining the specifics of the commitment to perform labor or purchase materials. Commitment Items will include specifics like quantities, prices, and delivery terms.

Cost Code: Also referred to as “Phase Codes,” Cost Codes are used as part of a Job Cost system to track the costs of a Job. In construction, many companies opt to use the standardized CSI Divisions as cost codes. For example, the CSI Division for Concrete is “03” and the Section for Decks is “500”, so the cost code of “03-500” is for Concrete Decks. The fundamental purpose of cost codes is to track all job-related expenses in an orderly fashion that is consistent across all jobs, enabling complex cost management, reporting, and analysis.

Cost Types: Cost Types accumulate expenses under cost codes and categories using fixed types of costs. Common examples of Cost Types include Labor, Materials, Equipment, Overhead, Subcontract, and Misc/Other. Some construction ERPs allow partial customization of Cost Types instead of supporting Categories. When Categories are used for coding, there is no need to use Cost Types as all categories have a fixed Cost Type.

Credit Card Transactions: This term is used in the Document Flow (AP) module**.** It is a financial transaction in which a cardholder uses their credit card to make a purchase or payment, with the promise to repay the card issuer later. In hh2, the AP Administrator or AP Manager will upload these transactions from the bank into hh2 and the system will match them with receipts uploaded by the cardholder.

Crew Punch: In the Remote Payroll module, the Crew Punch feature allows a manager to punch all employees, designated to a certain Payroll Group, in or out at once.

CVS (Comma-Separated Values) File: A plain text file format used to store and exchange structured data, where each line represents a record, and fields within each record are separated by commas. This term is used in the Document Flow (AP) module.

Daily Logs/Field Reports: Within the Field Reports module, these terms are used interchangeably to reference construction logs that allow for reporting of a variety of variables on or off the job site.

Data Entry: This term is used in the Document Flow (AP) module. In hh2, Data Entry is the second step in the Document Flow-Invoice Process. It includes reviewing the Invoice, and coding data into the Header and entering full or partial Distributions. Typically, Data Entry is performed by AP staff before sending the invoice down the customizable Workflow. Much of the Header can be automated by using OCR and Autofill features of hh2 Document Flow. Often, the distribution coding during Data Entry is limited to just assigning a Job, and the detailed distribution coding is done during the workflow process by those assigned to manage the Job, such as a Superintendent or Foreman for smaller Jobs. The last step of Data Entry is choosing which workflow that should be used for approval or rejection if the default needs to be overridden.

Davis Bacon: Work where the government guarantees an assured wage for certain types of work (by Certified Class) on government. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include Certified Work or Prevailing Wage Work.

Decrement: This term is used in the HR and Pay Stubs modules. It refers to the reduction or deduction of accumulated time off from an employee's leave balance.

Distribution: In the context of AP Invoices, Distribution refers to the allocation or assignment of costs to various Commitments, Jobs/Projects, Cost Codes, Categories or G.L. Accounts within a construction company. This process is essential for accurately tracking the financial performance of different Jobs/Projects and segments of the business. In hh2, Distributions are partially coded during the Data Entry step and final coding of Distributions can occur during the Workflow phase of the hh2 Document Flow-Invoice Process.

Distribution Split: This term is used in the Document Flow (AP) and Remote Payroll modules. When a single invoice must be coded to more than one Commitment, Job/Project, Cost Code, Category or GL Account (General Ledger), the user may elect to split the Distribution into multiple distributions. Users have the option to calculate the value of one of the Distributions to adjust to the remaining value after all other distributions are added up. Negative Distributions are permitted when necessary (although not common). This feature can also be utilized for Equipment in the Remote Payroll module.

Document: hh2 Document Flow is primarily a Document Management system. Documents refer to the financial instruments that hh2 Document Flow currently manages: Invoices, Reimbursements, Credit Card Transactions, and Application for Payments. Sometimes, the term Image is also used during the Data Acceptance step for images that need to be recognized by the Optical Character Recognition (OCR) before becoming a Document. The standard hh2 Document format is a Searchable PDF (either native pdf, or from raster images that have been run through the OCR process built into hh2 Document Flow Data Entry).

Document Acceptance: This is the process of accepting invoices that were captured using one of the many methods available to hh2 Document Flow Customers. Invoices can be captured by email, document scanner, monitored network folder, API, manual web upload, scanned by app, and uploaded after "opened in" an app. In cases where large groups of invoices were scanned in batch, typically by a document scanner, hh2 has advanced options to delete blank pages or split a document into multiple invoices and can be configured to combine multiple documents into a single invoice. Images may be enhanced and OCR'ed into Searchable PDF format.

Document Class: Utilized in the hh2 HR module. Document Classes provide a means to categorize available document types, appearing on Employee Records and Job/Crew Dashboards. For instance, documents may be related to 401K benefits, job offers or even company newsletters. This feature allows for a quick search on types of documents.

Document Flow: The hh2 module that streamlines the invoice management process. Also referred to as the AP Module.

Document Flow Process for Invoices: The four-step process of Document Acceptance, Data Entry, Workflow, Final Review and Export of invoices in the hh2 Document Flow (AP) system.

Document Flow for Receipts: The five-step process of Capturing and Uploading the Receipt Image, Receipt Coding, Importing Credit Card transactions, Workflow routing and the Final Review and Export to the accounting system. This process is performed in the Document Flow (AP) module.

Document Flow Process for Reimbursements: The four-step process of Capturing and Uploading receipts for reimbursement, Coding the reimbursement, sending it through a Workflow and conducting a Final Review and Export to the accounting system. This process is performed in the Document Flow (AP) module.

EEO-1 Reporting: Referred to in the hh2 HR module. The EEO-1 (Equal Employment Opportunity-1) report is a mandatory survey for U.S. employers with 100 or more employees, collecting data on workforce composition by race, ethnicity, gender, and job category. It helps identify and address workplace discrimination and promotes diversity and inclusion.

Entity: This term is used in the Document Flow (AP) module. It refers to the Business Unit used by the ERP accounting system. Sometimes the business entity is part of a larger parent company or entity. Sometimes business entities are created specifically for a large single project. Data Entities are abstract concepts that identify the properties that make it unique. Examples of data entities include Job, Employee, Cost Codes and GL Accounts.

Equipment Revenue: Within the Remote Payroll module, construction companies can monitor the duration of equipment usage. Employee time is linked to specific pieces of equipment for revenue tracking purposes. The Equipment Revenue undergoes an Approval Path and is ultimately exported to the accounting system.

ERP: Enterprise resource planning (ERP) is a type of software system that helps organizations automate and manage core business processes for optimal performance. In this case, the ERP system refers to the construction accounting system, such as Sage 300, Construction and Real Estate, Sage Intacct, Viewpoint Vista, and QuickBooks.

Export: Refers to the process of moving data from the hh2 system to the construction accounting system or ERP.

Extra: Sage 300 Construction, Real Estate, and Sage accounting systems (ERPs) opted to use a separate entity for a child job called an Extra. It denotes a smaller portion of a parent job that can be managed like a normal job. Most other construction accounting systems (ERPs) have opted to use hierarchal jobs (parent jobs and child jobs or sub jobs) instead of Extras. An example of an Extra might be an auditorium or exhibit hall as part of a larger complex.

Field User: A construction company employee that uses hh2 software out in the field.

Field Work: Work that happens in the field, versus in the Shop or Office.

Finalize: In the context of Field Reports, this refers to the process of locking down a log, so no further edits are allowed. Logs not finalized within the period specified in the System Setting (FR>Settings>System Settings>General Settings tab>Auto-finalize logs) will be automatically finalized by the hh2 system. This will protect the legal integrity and credibility of the Daily Log. However, there is the ability to add an addendum. Unit Production/Activities data is synchronized to the Sage 300 accounting system, as well as Remote Payroll data from the Remote Payroll module at the time of finalization.

Final Review and Export: During this step, invoices or are reviewed and then exported to the accounting system. Mistakes can either be corrected and invoices (for Document Flow) or time (for Remote Payroll) are sent back to earlier stages in the Workflow for revision. If everything checks out, the Invoice (for Document Flow) or Labor Time Sheet (for Remote Payroll) is approved and then exported to the accounting system (ERP).

Foreman: This role varies based on the construction company's business model and needs. Typically, this person is responsible for managing a crew of construction workers. For larger jobs, with multiple crews, a Foreman usually reports to a Superintendent. Within the hh2 system, this job role may be set up as a part of the Workflow process. Foremen usually approve standard invoices, receipts, or reimbursements and time in the Document Flow (AP) and Remote Payroll modules. Further, allowed Formen may have access to certain employee records in the HR module.

Fringe: The employer paid portion of the employee's benefits, such as health care costs. This term is used in the HR and Pay Stubs modules.

General Ledger or G/L Account: A comprehensive record of all financial transactions and accounts for an organization, providing a snapshot of its financial health. Sometimes referred to as the G.L. For construction accounting systems, the Job Cost is an abstraction of the G.L. that makes it easier to record transactions related to specific cost codes on specific jobs. Overhead expenses are commonly coded directly to a G.L. Account or to an overhead Job that rolls up to the G.L. Examples of overhead expenses may include rent, insurance, taxes, and salaries of office staff.

Global Password: A separate password in addition to the Administrator's own log in password. It is utilized when organizations have multiple Administrators, and only certain Administrators should have access to the Security Group Setup. See Security Group. This provides a means to create security around Pay Stubs and employee records in the HR module.

Header: The portion of the invoice that uniquely identifies information for the entire invoice but is separate from the distribution (where costs are allocated to) data. Typical Header information includes, but is not limited to, items like Vendor, Invoice Date, and Due Dates. Data requirements for the Header are heavily based on individual construction accounting system requirements. This term is used in the Document Flow (AP) module.

Hh2 Admin: An hh2 employee that assists with set up of the construction company's hh2 site.

HIPPA Regulations: Referred to in the hh2 HR module. HIPAA (Health Insurance Portability and Accountability Act) regulations aim to protect employee privacy by establishing standards for the confidentiality and security of information, ensuring that sensitive details are safeguarded in the workplace. This term is used in the HR module.

Home Page: the initial landing page a user is brought into when signing into hh2.

Icon: a small graphical representation or symbol that represents an object, concept, action, or function. They are often designed to be easily recognizable and can represent anything from simple actions (like saving a file) to more complex concepts (like settings or navigation). For the purposes of this document, they may also be considered a button.

Identifier or Site Identifier: Refers to the company's unique hh2 URL site name. For example, if the construction company is ABC Construction, the identifier of "ABC," might be included in the URL. For example: "https://abc.hh2.com".

Image: This refers to any sort of raster image (like photos) or scanned invoices that have been uploaded to the hh2 system that have not yet been accepted into the AP-Document Flow module. Once these images have been run through the Document Acceptance process, they become Documents. Most of the time, these images become Invoice Documents, but can also become Credit Card Receipts or Reimbursements. Images may be uploaded in other hh2 modules such as Field Reports and HR.

Import: The process of moving data into the hh2 system from the construction accounting system or ERP. There are some places where data can be manually imported into hh2 like credit card transactions. Sometimes data can be imported by hh2 staff in excel format. For instance, a list of employees to set up as users.

Invoice: A bill a company receives from a vendor. Many vendors send invoices by email and are already in a native searchable pdf. For paper invoices that must be scanned, invoices may be received in an image format that must be run through hh2's OCR software in Data Entry before data can be automatically captured. This term is used to in the Document Flow (AP module).

Invoice Acquisition: Refers to how an invoice was acquired. Invoices can be acquired by email, document scanner, monitored network folder, API, manual web upload, scanned by app, and uploaded after "opened in" app. This term is used in the Document Flow (AP module).

iPaaS (Integration Platform as a Service): An hh2 product, depending on the software version, it may be seen as the OCM module on the Home Page. This links and syncs data between hh2 and certain 3rd party products such as Procore. hh2 Document Flow is bundled with hh2's Integration Platform as a Service or iPaaS. iPaaS is configured to automatically pull data from the construction accounting system (ERP) and reconcile it with the online copy within hh2. This ensures all accounting codes like Jobs, Costs codes, employees and others are always kept current within hh2. hh2's iPaaS also ensures that changes made in hh2 are synchronized automatically to the ERP. In some cases, hh2's iPaaS can also be configured to synchronize data from 3rd parties, such as Procore, directly to the ERP.

Job: A job is a contractual obligation to perform a specified scope of work for a customer. Also called a Project, a job can have multiple commitments (subcontracts and purchase orders) by vendors associated with it. hh2 Document Flow is set up to allow permissions to be configured by job and job role. Sometimes jobs can have child jobs or sub-jobs. In Sage 300 Construction and Real Estate, these sub-jobs are called Extras. In most other construction ERPs, they are simply child jobs of a larger parent jobs in a hierarchal relationship. Job and Project are used interchangeably by hh2. Time may be coded to Jobs in Remote Payroll.

Job Code/Number: A unique code assigned to a specific project or job within a construction company. This code is typically set up in sections to help make it easier to identify the job. It helps track and organize financial transactions, costs, and revenues associated with a particular project. Job Numbers are used to differentiate and manage various ongoing projects, allowing for accurate cost allocation, budgeting, and financial reporting. Job Codes can be alphanumeric and may include separator characters for each section. For example: "200-24" might be the 200th project the company has done, and it started in the year 2024.

Job Phase: Although some within the construction industry may refer to phases of construction, most of the time it refers to the work breakdown structure in Job Cost. Cost Codes and Phase Codes are used interchangeably. Some construction accounting systems use hierarchal cost codes or phase codes. Hh2 imports them as separate codes.

Level: In hh2, levels within the Workflow handle invoice review, approval, and passing from lower to higher levels, culminating in data export to the accounting system. Levels are more of a loose term as routing within a workflow can have decisions and branching logic that make levels more abstract.

Module: Refers to hh2's product offerings: AP-Document Flow for Invoices, Credit Cards, and Reimbursements; RP-Remote Payroll; HR-Human Resources; PS-Pay stubs; and FR-Field Reports.

OCR: Optical Character Recognition. It is a technology used to convert raster documents (any documents that use colored pixels to make a larger image), such as scanned paper documents, raster PDF files (pdf files that come from scanned images), or images taken by a digital camera, into hh2's native file format, searchable pdf. OCR technology enables computers to recognize and extract text from these raster images, turning them into machine-readable text that can be manipulated, searched, and analyzed. OCR is used to easily pre-fill header information on invoices.

Overhead Expenses: Expenses that are not coded directly to a job or project. These might include certain types of office workers or laborers assigned to maintain equipment, for instance. Many times, overhead expenses are coded directly to GL Accounts but sometimes companies choose to set up an overhead job to track overhead as it gives them advanced reporting available in the job cost system.

Page: The terms Page, Screen, Form or Window are used interchangeably in this document. All referring to the location of the visual display of information.

Parent: Some concepts in construction are hierarchal, meaning they are organized and structured with parents and children. For business entities, sometimes child companies are part of a larger parent company. For data entities, some abstract concepts fall as child entities of another larger entity, such as Extras or Sub jobs being a child of a larger Job, or Cost Codes being a child entity to the Job that tracks costs. See: Child.

Pay-app: Refers to a payment application or payment request. It is a formal document submitted by a contractor or subcontractor to request payment for work completed on a construction project. The pay app outlines the amount of work done, materials used or stored to date, and any other billable items, along with their associated costs. In hh2 this is currently in Beta.

Pay Identifier: This is the identifier for a type of pay within the accounting system.

Payroll Group: In the Remote Payroll module, a Payroll Group refers to a collection of employees who share similar payroll characteristics. For example, all salaried employees may be assigned to one Payroll Group, while another Payroll Group may include all hourly employees.

Pay Type: This is how hh2 distinguishes types of pay. For example, Regular Pay, Overtime Pay, Paid Time Off, Sick Pay and others. Pay Types can be set to display, or not, on hh2 Pay Stubs. This term is used in the Remote Payroll, HR, and Pay Stubs modules.

Picklist: Also known as a dropdown list, is a menu-like interface element often seen in forms and websites, offering users a set of predetermined choices to choose from, enhancing data entry efficiency and uniformity. In hh2, Picklists come in the form of Cards or dropdown lists.

Prevailing Wage Work: The government guarantees an assured wage for certain types of work (by certified class) on government Jobs. Examples of such Jobs may include work on schools, highways, or government buildings. Other interchangeable terms include Certified Work or Davis Bacon.

Project: A project is a contractual obligation to perform a specified scope of work for a customer. More commonly called a Job within hh2, a project can have multiple commitments (subcontracts and purchase orders) by vendors associated with it. hh2 Document Flow is set up to allow permissions to be configured by job and job role. In the Remote Payroll module, Payroll Groups may be assigned to Jobs. Sometimes jobs can have child jobs or sub-jobs. In Sage 300 Construction and Real Estate, these sub-jobs are called Extras. In most other construction ERPs, they are simply child jobs of a larger parent jobs in a hierarchal relationship.

Promote: In the context of Workflows, "Promote" refers to the capability to advance an approval from one level in the approval process to the next without requiring approval from the current level. This functionality is utilized when an approver is unavailable to approve time or receipts. Additionally, "Promote" signifies that the time or document is currently at a lower level than the logged-in user. This term is used in the Document Flow (AP) and Remote Payroll modules.

Punch Clock: In the Remote Payroll module, the Punch Clock feature enables employees to log their time by punching in and out, including coding. It is important to note that this feature should not be confused with the legacy Attendance Punch feature, which does not capture coding. Similar to labor and equipment, Punch Clock time follows an Approval Path and is eventually exported to the accounting system.

Push Notification: A push notification is a short message or alert sent to a user's device. These notifications "push" information to the user without requiring them to actively open them. They appear on the device's screen, usually accompanied by a sound.

Queue Digest: A queue digest, often referred to as a "queue summary" or "queue report," is a consolidated overview of activities or items in a queue. It provides a snapshot of the status, progress, and contents of the queue at a specific point in time. This summary can include information such as the number of items waiting, being processed, or completed, as well as any relevant details about those items. Queue digests are often used to help users or administrators quickly understand the state of a queue without having to review each item individually. Specific to hh2's Document Flow, a Queue is a summary of all invoices in the workflow requiring action from the user.

Receipts: Receipts are written or electronic documents that serve as proof of purchase. Purchases are typically made on the construction company's credit card, then uploaded into the hh2 system by snapping a picture. The AP Manager or Administrator then imports credit card transactions from the construction company's bank. Once this process occurs, the receipt is now converted to and considered an invoice in hh2. This term is used in the Document Flow (AP) module.

Reclaim: In the context of Workflow or Approval Path, "Reclaim" denotes the action of retrieving time or documents back to one's own level for approval. This feature allows users to bring items back to their stage in the approval process for further review or necessary adjustments. It also serves as an indicator to the individual in the highest level of the Workflow or Approval Path that either documents or time is ready for export. This term is used in the Document Flow (AP) and Remote Payroll modules.

Reimbursements: Unlike receipts, reimbursements are purchases made directly by the employee, either by cash or on their personal credit card. Receipts, on the other hand, are purchases made on a company credit card. Once uploaded and coded, reimbursements move through the Workflow as an invoice. Finally, they are exported to the accounting system. This term is used in the Document Flow (AP) module.

Roadblock: In the context of the time approval process, a "Roadblock" refers to an obstruction disrupting the normal flow of the approval process. Payroll Managers and Administrators can leverage the Roadblock feature to identify the specific level within the Approval Path where the obstruction is occurring. This feature aids in pinpointing issues and streamlining the resolution process.

Section/Tab: These terms are often used interchangeably. This is the portion of the Daily Log/Field Report that contains specific data related to the Section. For instance, the Weather Section (tab) stores information about the current logs weather conditions. This term is used in the Field Reports module.

Security Group: Security Groups: Utilized to in the hh2 HR and Pay Stub modules. Security Groups are utilized to categorize users, including HR Managers and other authorized individuals, into specific groups, dictating their access to employee records and pay stub information. The configuration of Security Groups is restricted to System Administrators.

Shop: An in-house workshop where employees of a construction company perform work such as welding for Jobs. This may also include fixing and maintaining company equipment. This is the opposite of Field Work, where work occurs on the job site.

Skills Matrix: In the HR module, the Skills Matrix allows the HR Administrator the ability to set up skills matrices that tie into the Evaluations tab on the Employee Record, Jobsite Dashboard, and the Crew Dashboard. Furthermore, Skills appear on Classifications and Locations reporting.

Synchronization (Sync): The process of syncing data between hh2 and the construction accounting system or ERP. This can be either importing or exporting data to and from hh2.

Standalone: If a construction company uses hh2 without an ERP, then they do not synchronize data to and from an ERP accounting system using hh2's built-in iPaaS. Some features and functionality will behave differently without this automated integration. Setup for the system will differ as well. Generally, this is not considered a best practice if the integration for the ERP in context already exists. However, construction companies that use non-construction accounting systems or rarely used construction ERPs may choose to use hh2 standalone.

Superintendent: Oversees the entire project in the field. These individuals typically report to a Project Manager and holds teams and foremen accountable for completion of work. In some smaller construction companies, the Superintendent acts as the Foreman and Project Manager.

System Administrator (Also referred to as Global Administrator): This is typically the IT person at the construction company. The System Administrator's role is to roll out the hh2 product at the construction company. They usually work with synchronization tools to ensure data is properly synchronized between hh2 and the company's accounting system and may be involved with the initial setup of user accounts and permissions.

Unit: A standardized quantity or measure used to quantify and price specific tasks, materials, or services within a project.

Unit Cost: The unit cost represents the expense of obtaining or creating a single unit of an item, including materials, labor, equipment, and overhead. This cost estimation method aids in calculating the total cost for a project component by multiplying the unit cost by the required quantity. For example, when building a concrete foundation, there may be a unit of "cubic yards of concrete." The unit cost would include the cost of materials (cement, aggregates), labor, equipment, and other expenses required to produce one cubic yard of a concrete foundation.

Unit Production: This term is referenced in the Field Reports module. In construction, Unit production involves quantifying work tasks using standardized units, such as square footage or linear feet. An example of unit production is tracking the square footage of drywall installation. This method allows for precise measurement, tracking, and management of construction activities. By breaking down tasks into measurable units, construction professionals can more accurately estimate costs, assess project progress, and allocate resources efficiently.

User: Anyone that logs into hh2. They must have a user account, with a username, password, first and last name and email address and ideally a cell phone number.

Username and Password: Within hh2 software, a user's username and password are considered global, and can be used across all the hh2 modules that have been purchased.

User Preferences: Customizable settings that allow individual users to tailor the software's functionality, appearance, and behavior to their specific needs.

User Roles: User Roles define specific permissions, access levels, and responsibilities assigned to different individuals within a system, ensuring proper data security and functionality based on their roles and responsibilities. In hh2 Document Flow, for example key roles include the 1) System Administrator 2) Administrator 3) AP Manager 4) AP Clerk 5) Office User and 6) Field User. The key differentiator between the Administrator and Manager is that the Administrator can create new users and grant permissions to users.

Vendor: For Invoices in hh2 Document Flow, a vendor refers to an Account Payable (AP) Vendor, which is a supplier for Purchase Orders or a Subcontractor for a Subcontract. All Commitments have an AP Vendor assigned to it. For Credit Card transactions, a Vendor refers to the business that the item was purchased from in the credit card transaction. For reimbursements, some companies choose to set employees up as Vendors so that approved reimbursements can be processed via AP check.

Workflow: A system designed to facilitate the routing and approval of time, invoices, and other documents down a predefined path with branching logic. Hh2's workflows are designed with Role Based Approval so that very few workflows need to be configured. Decision nodes in the workflow determine how time, invoices and other documents will be routed in the workflow. For example, invoices can be routed in one direction if certain criteria are met, or the opposite direction if it is not. For instance, one possible configuration is to route the invoice in one direction if it is coded to an overhead GL Account or another direction if the invoice was coded to a job. Another possible configuration is to route the invoice in one direction if the invoice is over a certain dollar amount or another direction if it is less. Labor time, on the other hand, may be routed to various levels of job roles for approval and rejection through an Approval Path. This term is used in the Document Flow (AP) and Remote Payroll modules.

Change Log

A Change log is a documented list of changes between one version of a document and the next version.

Between Version 1 and Version 2 of this document the following changes were made:

- The addition of the Changelog.
- The addition of the newest version of the Glossary of Terms.
- The removal of the Change Background feature from the Home Page section.