

USER GUIDE

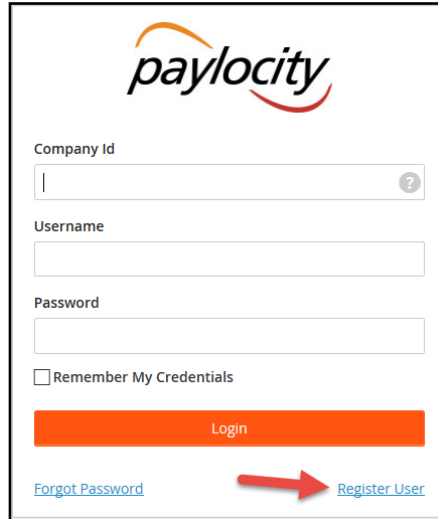


This page is intentionally left blank

1. Access Web Time by clicking on the Paylocity Icon shown below on the PC desktop.



2. Click **Register User on the bottom right of screen** to create a new User Name and Password.



3. Enter 37565 Lori's Gifts Company Id (not case-sensitive)

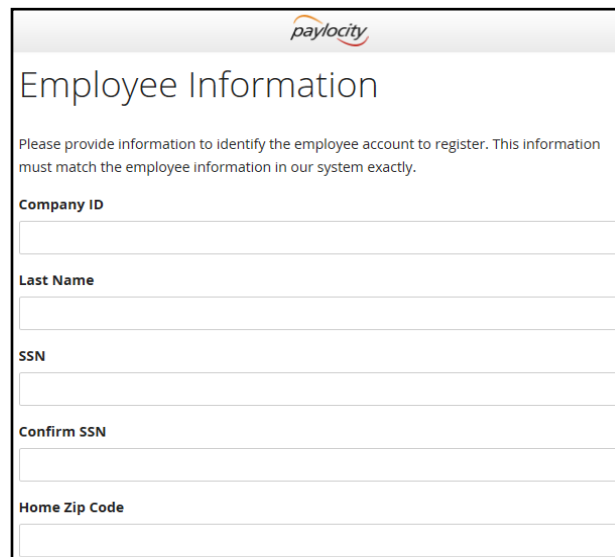
4. Enter your **Last Name**.

5. Enter your nine digit Social Security number (**SSN**)

6. Enter your SSN a second time in the **Confirm SSN** field.

7. Enter your Home Zip Code. If you have moved and not reported an address change to payroll, there may be an issue when you sign on. If you experience that issue, send an email to payroll@lorisgifts.com with your new address.

8. Click **Next**.



9. Enter the **Image Text**. This is a security process. If you can't read the distorted letters, click on Display New Image to receive another set of letters.

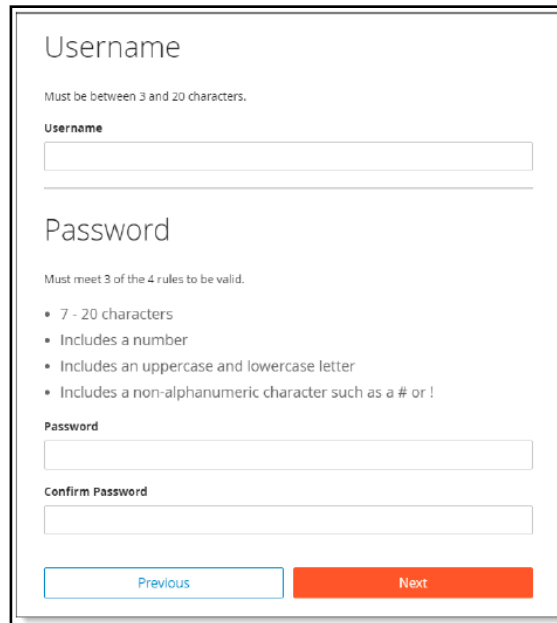
10. Click **Next**.



11. Enter the **User name** (not case-sensitive) and **Password** (this is case-sensitive) you would like to use when accessing this account; specific requirements are:

- ◆ User name must be between 3 and 20 characters long
- ◆ Password must be between 7 and 20 characters long, includes an upper and lower case letter, must include a number and a special character such as # or !

12. Enter your **Password** a second time in the **Confirm Password** field and click **Next**.



13. Select login challenge questions from the **Question 1, 2, and 3** drop downs and enter answers. Click **Next**.

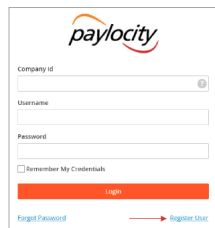
14. Select an image from the **Select Security Image** drop down.

15. Enter a personal **Security Phrase** (128 character limit) and click **Next**.

16. Verify all registration information is correct.

17. Click **Finish** to create the new user account and enter Web Pay.

Using Paylocity: After you’ve registered as a new user, sign onto the application. Remember the company ID is 37565. This will take you to the Self Service Portal which is the beginning landing page. The self service portal provides you with all the information you need. Let’s review some of the sections of the portal:



The Self Service Portal shows several blocks where various information is posted. Those blocks are News, Hi, Employee!, Company, Application, Time Entry, Pay, Time Off and Employees if you are a manager.

1. The **News** section is where an assortment of information will be posted. For now it shows company anniversaries. If you click on it, you’ll see information about that month’s anniversary.
2. The **Company** section is where news about our company is posted.

News Item

HAPPY ANNIVERSARY!! (click here)

Publish Date: 06/19/2017
Posted By: Vannatta, Vic

Congratulation to the following employees for reaching these milestone anniversaries with Lori's Gifts:

15 YEARS:
Dorothy Lopez - Store # 311 in Bronx, NY



10 YEARS:
Adelgie Cabreja - Store 182 in Elmhurst, NY
Patricia Bizier - Store 131 in Chattanooga, TN

Company Custom Page

LORI'S GIFT'S INC

Lori's Gifts was founded in 1981 and over our 35+ years in this unique industry, we have become the nation's leading operator of hospital gift shops. We currently operate more than 350 gift shops in 39 states from coast to coast, thanks to our team of more than 1,750 employees. Find out more about us at www.lorigifts.com.

3. **Hi, Employee’s Name** (your name will be inserted here) is a section that contains useful personal information about yourself. When you click on View Employee Profile, you will find 3 tabs, Details, Contacts and Social, where you will enter your information. Completing this section is mandatory so please start as soon as you can. Make sure you tap **Save** after each section. **Details** are demographics about yourself like a preferred first name, prior last name, birthday, marital status, etc. **Contact** includes space to enter phone and email addresses, street address and emergency contacts. **Social** is a place where you can write a short description of yourself. Do not post a picture or social media information. That will be reviewed at a future time.


LORIS GIFTS INC [37565]  8  Help

Web Pay Home Employees HR Payroll Talent Reports & Analytics Notifications

Home Directory Impressions Teams

Marilyn Sell

News ^

 **HAPPY ANNIVERSARY!!** (click here)
June 19, 2017

Hi, Marilyn! ^

[View Employee Profile](#) More...

Company ^

Application ^

[Employee Training Documents](#)
[Administrator Training Documents](#)

Time Entry ^

Never clocked in

59

3:53

CST PM

Notes

[Clock In](#)

[Clock Out](#)





[Transfer](#)

[Manual](#)

[Launch Time & Attendance](#)

Employees ^

Show Indirect

\$ Pay ^

[View Checks](#)

Date	Check #	Net Amount	Dir Dep
06/16/2017	5135	hidden	✓
06/02/2017	3337	hidden	✓
05/19/2017	1533	hidden	✓

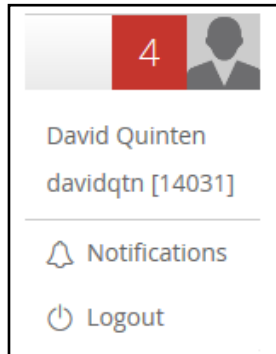
[More...](#)

Time Off ^

- Application** is where you can find additional on-line training information about Paylocity.
- Time Entry** is where you clock in and out for a fast punch. More detailed information in later pages.
- \$ Pay** shows details of your past several paychecks. Click on the orange VIEW CHECKS and details are presented. Click on [Download Paystub](#) if you want to see more detailed information. Remember to keep this info confidential.
- Time Off** shows an overview of your PTO balance, used PTO, Available, and Approved. Requests are not made here.
- Employees** is a section seen only by managers where information about direct reports is listed. All of the same info displayed in red is here.
- Logoff** is available by clicking on the picture in the upper right corner and then sliding down to logout. Click on the man to see the info in the drop-down.

Logging out of Paylocity and checking mail:

In the upper right corner of your screen is a picture of a man and a red box that shows the number of emails you have.
To logout of Paylocity: Click on the man until the drop down shows information. Slide the mouse down to Logout and click. You will be logged out of the application. **Remember, if you don't complete this step, any employees in your store will see your confidential information.**



To review your email: The red box shows 4 which is the number of emails waiting for you to review. Click on the red box and the Message Center below is show. Click on the Received date/time to see the detail of each message. Click in the square and the Delete or Mark as Read to remove or reduce your message number.

Message Center

Unread Only

From Date: 3/24/2017

To Date: 6/24/2017

Priority: -- All --

Subject:

Category: -- All --

Email Sent?: -- All --

Search

Records: 8

<input checked="" type="checkbox"/>	Received (CST)	Priority	Subject	Category	Email?
<input type="checkbox"/>	05/26/2017 - 10:37 AM		Paylocity Payroll + HR password reset request 37565 LORIS GIFTS INC	User Admin	
<input type="checkbox"/>	05/18/2017 - 12:27 PM		Paylocity Payroll + HR: Login Success	User Admin	
<input type="checkbox"/>	05/01/2017 - 5:28 PM		Company 37565 LORIS GIFTS INC new supervised employee	Event	
<input type="checkbox"/>	05/01/2017 - 5:28 PM		Company 37565 LORIS GIFTS INC new supervised employee	Event	
<input type="checkbox"/>	05/01/2017 - 5:27 PM		Company 37565 LORIS GIFTS INC new supervised employee	Event	
<input type="checkbox"/>	05/01/2017 - 5:26 PM		Company 37565 LORIS GIFTS INC new supervised employee	Event	
<input type="checkbox"/>	05/01/2017 - 5:26 PM		Company 37565 LORIS GIFTS INC new supervised employee	Event	
<input type="checkbox"/>	05/01/2017 - 5:25 PM		Company 37565 LORIS GIFTS INC new supervised employee	Event	

Emails are sent to you when activities happen. Click on the box to the left and then click on Mark as Read or Delete to take

Records: 8

Sending a message to an employee from the employee's time card: when in the time card, ask questions or caution an employee of clocking in/out at the wrong times by clicking on the orange [Send a Message](#).

- Home
- Time Card
- Schedules
- Time Off Calendar
- Time Card Approvals

Employee Time Card

Go K < > N Select Filter Include Inactive Employee

Date Range Pay Period 06/11/2017 - 06/24/2017 ↻ Prev Current Next

- + Add Punch
+ Add Pay Type Transaction
✉ Send a Message

<input type="checkbox"/>	Date	Pay Type	Amount	In	Out
<input type="checkbox"/>	Sun 06/11/2017	None <input type="text" value="None"/>			
<input checked="" type="checkbox"/>	Mon 06/12/2017			07:58 AM	03:50 PM
<input checked="" type="checkbox"/>	Tue 06/13/2017			08:02 AM	04:29 PM

This will open up the Quick Message dialog box below where a message can be written to an employee and an expiration date for the message to be viewed is assigned. When complete, click on the blue [Send](#).

Quick Message to [Redacted] ✕

Message

Expires On

+ Send
⊖ Cancel

CLOCKING IN AND OUT: Step 1: Wait until your scheduled clock in time is close. Allow for the time it takes to sign in. Single click the orange Clock In button and you are done. When you are ready to clock out, do the same thing with the blue Clock Out button.

Step 2: If you are assigned to work outside your home store, click on the blue Transfer button. The box below will pop up and enable you to select the new store where you will Clock In. Next, click on the orange clock in button, as normal. When you clock out, click on the blue clock out button and it will complete that punch. Note: if you live in a state with 2 time zones, Paylocity defaults to one or the other. Tennessee is an example of this. The hours are still correct.

Reminder: Please pay attention to the times you clock in and out compared to your scheduled time. This is very important to make sure that your store is not penalized for going over your allocated hours. If a store exceeds hours, sales for bonus pay is forfeited for all employees during that pay period.

Manual Time Entry would not be normally used. It provides a space where you can select a cost center.

APPROVING YOUR TIME SHEET: When your final shift during the 2 week pay period is completed, you are required to approve your timesheet before leaving. If this is not done, your manager will edit and approve what's showing which may have errors. From your personal home page, go to My Timesheet. Once in the timesheet, you will be able to review all entries. Either use the Approve All button or click on each day in the left-hand column. If you see a yellow triangle with the ! Symbol, that is an indication that the punch time does not reflect hours entered for you on the schedule. If you're seeing these symbols on your timecard, you should be waiting in the lobby until 5 minutes prior to your shift begins before clocking in.

LORIS GIFTS INC [37565]

Applications Home Employees Payroll Reports Configuration

Home Time Card Schedules Time Off Calendar Time Card Approvals

Employee Time Card

Go K < > X Select Filter Include inactive Employees

Date Range Pay Period 06/11/2017 - 06/24/2017 Prev Current Next

+ Add Punch + Add Pay Type Transaction Send a Message Save Discard Changes Audit Trail Preferences

<input type="checkbox"/>	Date	Pay Type	Amount	In	Out	In	Out	Reg	OT1	OT2	UnPaid
<input type="checkbox"/>	Sun 06/11/2017	None						0.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input checked="" type="checkbox"/>	Mon 06/12/2017			09:00 AM	12:30 PM	01:00 PM	03:45 PM	6.25 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input checked="" type="checkbox"/>	Tue 06/13/2017			09:14 AM	03:36 PM			6.37 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input type="checkbox"/>	Wed 06/14/2017	None						0.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input type="checkbox"/>	Thu 06/15/2017	None						0.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input checked="" type="checkbox"/>	Fri 06/16/2017			09:10 AM	03:41 PM			6.52 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input checked="" type="checkbox"/>	Sat 06/17/2017			02:00 PM	08:29 PM			6.48 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input type="checkbox"/>	Sun 06/18/2017	None						0.00 hrs	0.00 hrs	0.00 hrs	0.00 hrs
<input checked="" type="checkbox"/>	Mon 06/19/2017			09:04 AM	01:26 PM	02:00 PM	03:41 PM	6.05 hrs	0.00 hrs	0.00 hrs	0.00 hrs

IF A TIME CARD NEEDS TO BE EDITED: To add information to a time card, select one to the types from the Pay Type drop-down. Many of these activities will be done by Payroll once an email request and supporting documentation is submitted. Examples of these are Jury Duty and Bereavement.

Banking Time: Most banking time is requested to be done after hours. When the manager/asst. manager goes to the bank to drop off the deposit, an additional entry is made the next day with Banking pay type selected to record the time it took to travel from the store to the bank. No time from the bank to your home should be recorded. If a manager leaves during the day to get change at the bank, a clock out punch should be made. When the manager returns, another in/out punch should be made/edited for the bank time. Lunch time should also be recorded separately.

Home | Time Card | Schedules | Time Off Calendar | Time Card Approvals

Employee Time Card

Go [] Select Filter Include Inactive Employees

Date Range: 06/25/2017 - 07/08/2017 | Pay Period: 06/25/2017 - 07/08/2017 | Prev | Current | Next

+ Add Punch | + Add Pay Type Transaction | Send a Message | **Save** | Discard Changes

When editing your time card, you are required to select a Pay Type from the drop-down list.

Date	Pay Type	Amount	In	Out	In	Out	Reg
Sun 06/25/2017	None						0.00 hrs
Mon 06/26/2017	Sick		01:55 PM	07:19 PM			5.40 hrs
Tue 06/27/2017	ABSENT		01:55 PM	Missed Punch			0.00 hrs
Wed 06/28/2017	Bereavement						0.00 hrs
Thu 06/29/2017	Unpaid Time Off						0.00 hrs
	Meal Penalty						0.00 hrs
	Banking						0.00 hrs

Supervisor's Approval: Time Cards are approved at the end of a pay cycle. An email is also sent from Payroll as a reminder. The employees time card must be approved first. That will be indicated on the right of the screen in the EE App field when it is checked. The supervisor will just click on the Approve box to the left. Then click on the red **Save** above the approve box. When that task is completed, an indication will show in the Supv App box on the right. Using the blue **Filter** function near the top of the screen can assist if there are a large group of stores for a District or Regional Manager to approve.

LORIS GIFTS INC [37565] | paylocity | Search [] | Help

Applications | Home | Employees | Payroll | Reports | Configuration

Home | Time Card | Schedules | Time Off Calendar | Time Card Approvals

Filter [] | Reset | -- Load Saved Filters -- | Feedback

Active Filters: Employee Status: Active | Position: 174 | Save search as... | Save | Delete

Time Card Approvals

06/25/2017 - 07/08/2017 | Current | Payroll Policy Duration: Hourly

Save

Approve	Employee	Regular	OT1	OT2	Non Work	Total	Missed Pun...	Est Meal Pr...	App Meal Pr...	EE App	Supv App	Assigned Su...
<input type="checkbox"/>	[]	17.42 hrs	0 hrs	0 hrs	8 hrs	25.42 hrs	1	0 hrs	0 hrs	<input type="checkbox"/>	<input type="checkbox"/>	Sell, Marilyn

1 - 1 of 1 Items

SCHEDULING: Step 1: Hover your mouse over the \$ Web Pay Symbol in Grey. You will see 3 icons: Company, Self-Service Portal and Web Time. (Unable to provide a screen shot of this.) Select Web Time. The next panel you'll see has 5 icons.

Step 2: Click on the **Schedules** icon.

Step 3: **COST CENTER EQUALS STORE NUMBER.** In the cost center field, select the store number that matches your store. The number **MUST** be a 6 digit number so store 2 will be listed as 002000 while store 114 will be listed as 114000. Once the number is selected, click on up Update first, then **Search**.

Employee Scheduler

First Name

Last Name

Cost Center

Employee Group

Payroll Policy

Salary Type

IMPORTANT: Leave all of these fields blank. Just go to Cost Center below

Click the magnifying glass to see a list of cost centers where you will select

[Search](#) [Show All](#) [Reset](#)

From 05/21/2017 To 05/27/2017 [< Last Week](#) [This Week](#) [Next Week >](#)

Cost Center Selections

Department

[Click Here](#)

[Update](#) [Clear](#) [Cancel](#)

Step 4: Click on the **Update** text to record the correct gift shop.

Step 5: If Update and Search were selected, you should see a list of employees like below. If you have no employees, repeat step 3 as you selected the wrong store/cost center. If correct, you should see an example like this:

The screenshot shows the Scheduler interface with several callouts:

- Callout 1:** "Use these arrows to change the week you want to schedule." (pointing to the week navigation arrows)
- Callout 2:** "Use this area to Type to filter for store changes when one of your employees works in multiple locations." (pointing to the filter input field)
- Callout 3:** "Approved PTO is already reflected in future schedules" (pointing to a yellow 'Approved Time Off' block)
- Callout 4:** "Totals are summed on the day line and the Total line to provide a check on budgeted hours." (pointing to the bottom row of the grid)

Step 6: Make sure the correct week is selected before you start. Click on the employees name and then click on the day of the week you are entering the schedule. The block will turn blue. Click on the [Add Shift](#) message.

The 'Add Shift' modal window displays a list of shifts with a blue highlight under the '7A-3:30P' shift. A 'Favorite Shifts' dropdown menu is open, showing options like '11A-6P' and '8:45P'. The 'Add Shift' button is highlighted in blue.

Important Tip about employees that work in their home store and another store: when the new shift is being added, click on the filter (funnel) and select store. This will provide the 6 digit numbers used to select a store. Click on the second store and the schedule will reflect the other store location.

Add Shift

Close

Apply

New Shift

Start Time (required)

1:00 PM

End Time (required)

5:00 PM

Shift Hours

4 hrs

Add Cost Center

The dropdown menu shows filtering options: 'Store', 'Site Code', and 'Position'. The 'Store' option is currently selected and highlighted.

Recent Shifts

- ☆ 1P-5P --
- ☆ 10A-12P 11000/--/--
- ☆ 10A-2P --

Step 7: Once the information is entered, select **APPLY** to save your work. At the bottom of the Add Shift screen, a Favorite or recent shift can be selected from any shown for easy entry.

Add Shift

New Shift

Start Time (required)

End Time (required)

Shift Hours

-

Add Cost Center

Favorite Shifts

Recent Shifts

Click on any of the Recent Shifts to fill in the start and end time.

- 1P-5P
--
- 10A-12P
11000/---/---
- 10A-2P
--

Step 8: The final schedule should look similar to the one below.

Home
Time Card
Schedules
Time Off Calendar
Time Card Approvals

Back to old Scheduler
What's New?
Feedback

Welcome to your new Scheduler! This new, default view provides you with advanced search, favorite shifts, improved cost center selection and more!

Scheduler 0 Errors Options

07/09/2017 - 07/15/2017 Current

Name	Sun 7/9	Mon 7/10	Tue 7/11	Wed 7/12	Thu 7/13	Fri 7/14	Sat 7/15	Total
SJ 114000/120/145		9A-3P		9A-3P	9A-3P		2:45P-8:45P	24 hrs
CL 114000/120/145	2:45P-8:45P	11A-6P	11A-6P		11A-6P	11A-6P		34 hrs
AL 114000/120/53			9A-3P	1:15P-8:45P	1:15P-8:45P	1:15P-8:45P	7:45A-3P	35.75 hrs
NO 114000/120/45		7A-3:30P	7A-3:30P	7A-3:30P	7A-3:30P	7A-3:30P		42.5 hrs
LT 114000/120/53	8:45A-3P	1:15P-8:45P	1:15P-8:45P	9:30A-5P				28.75 hrs
	12.25 hrs	29 hrs	29 hrs	29.5 hrs	29 hrs	23 hrs	13.25 hrs	165 hrs

Step 9: On the top right of the screen is an **Options** button. This will allow you to change the settings shown in the View Settings box below.

View Settings
Cancel
Apply

Shift display options

- Show Cost Centers
- Show Time Off Requests
- Display all weekdays

Data display options

- Show total hours instead of time off request times (e.g. 8.50h)

Caution: schedules should not be printed on store printers as they are not large enough to handle the formatting.

Step 10: Schedules can be copied from week to week if employees work the same schedule. This is a very easy function and will allow for editing if the schedule is close. Look for the More ... button next to the employee's name. When you click, you'll see the [Copy Week](#) or [Delete Week](#) box display. Then select the future week where you want to Paste that schedule. Click on the employee and then select [Paste Week](#). The same hours will become available for you to save or edit.

Scheduler

- Create Template
- Copy Week
- Paste Week
- Delete Week

Employee	Home Store	Site Code	Position Code	Hours
SJ	114000	120	145	
CL	114000	120	145	2:45P-8:45P
AL	114000	120	53	
NO	114000	120	45	
LT	114000	120	53	8:45A-3P

12 25 hrs

Clicking on the 3 dots will pull up the info above where you can copy or delete a week.

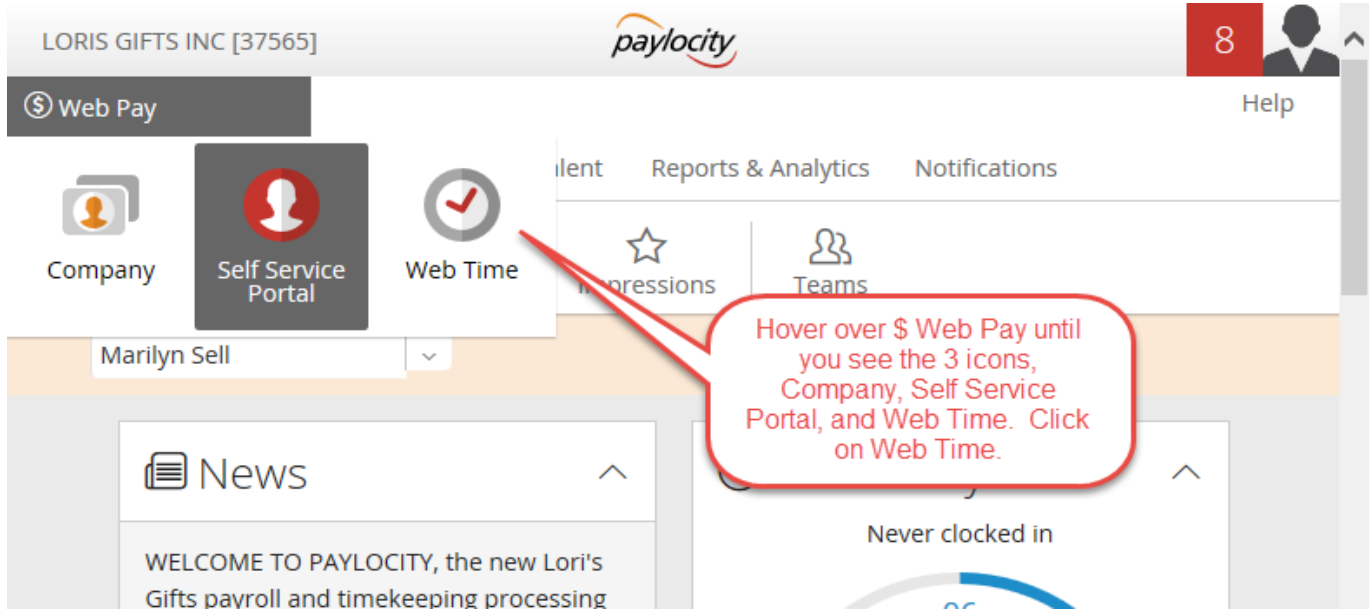
Scheduler

- Create Template
- Copy Week
- Paste Week
- Delete Week

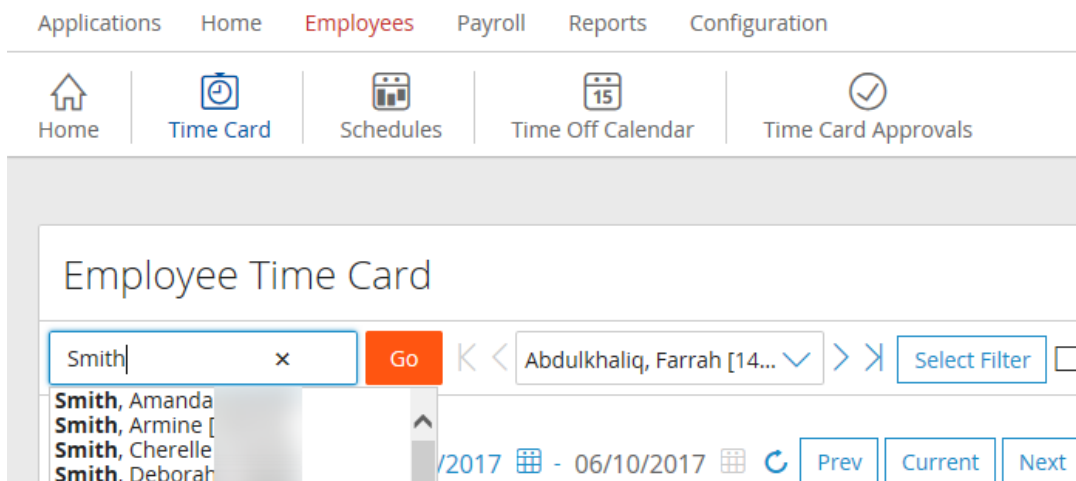
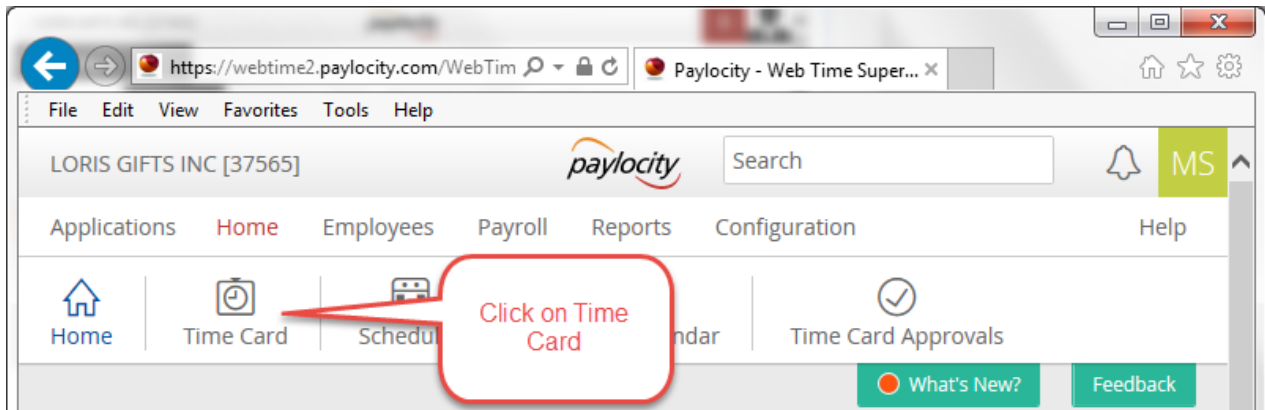
SJ	114000	120	145	
CL	114000	120	145	
AL	114000	120	53	
NO	114000	120	45	
LT	114000	120	53	

Above, you will see listed under the employees name their home store number (114000), site code (120) and their position code (145 for part time sales associate, 53 for part time assistant manager and 45 for store manager.)

EDITING OR ADDING A MISSING PUNCH: Hover over the \$ Web Pay box in the upper left of the screen until the 3 Icons become visible. Click on Web Time to begin the process.



EDITING OR ADDING A MISSING PUNCH: Click on the Time Card Icon as seen below. Enter a Last Name, click on the correct one and Click on Go. Or select a name from the drop down list illustrated on the next page.



EDITING OR ADDING A MISSING PUNCH: Make sure you have the correct employee and pay period date range selected. The system defaults to the current pay period. If you need to change the period, click on the previous or next box.

EDITING OR ADDING A MISSING PUNCH: Find the day that requires a correction. Looked for informational symbols like Missed Punch as notated below. Click on the box to edit and make the entry. Remember to enter A for AM or P for PM.

<input type="checkbox"/>	Tue 05/30/2017			07:55 AM	04:13 PM
<input type="checkbox"/>	Wed 05/31/2017			08:52 AM	05:11 PM
<input type="checkbox"/>	Thu 06/01/2017			08:55 AM	05:08 PM
<input type="checkbox"/>	Fri 06/02/2017			08:59 AM	05:59 PM
<input type="checkbox"/>	Sat 06/03/2017	None			
<input type="checkbox"/>	Sun 06/04/2017	None			
<input type="checkbox"/>	Mon 06/05/2017			09:00 AM	Missed Punch
<input type="checkbox"/>	Tue 06/06/2017	None			
<input type="checkbox"/>	Wed 06/07/2017	None			

Click on the field where the punch is missing. Enter the time like 2p for 2:00 pm. Press enter.

REQUESTING PTO: Click on the Time Off Calendar Icon. You will see the Time Off work area. It has 3 Blue Icons for Requests, Status, and Balances. Click on the one appropriate to your activity. Select the Type which will be PTO in most cases. Fill in the rest of the information such as Single or Multiple Days, the start date and end date, time and the number of hours requested. Add any notes intended for the supervisor. Click on the orange Submit Request Box. An email notification will be sent to your supervisor. You will receive an email when it is approved. You can also check on the status by clicking on the blue Status box in the middle. If you want to check your PTO balance, do that by clicking on the Balances box. Salaried personnel must enter only 4 or 8 **Hours Per Day** per company policy.

LORIS GIFTS INC [37565]

Search

MS

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Home

Time Card

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What's New?
Feedback

🕒 Time Clock

3:34:30
PM

Clock In

Clock Out

History

Comments

Transfer

Manual

Notes

Date	Time	Punch

📅 Schedule

📅 Time Off

Request

Status

Balances

Type

Select Type ▼

Single Day
 Multiple Days

Include Weekends

Start Date: 06/01/2017

End Date: 06/01/2017

Start Time: 8:00 AM

End Time:

Hours Per Day:

Notes

Submit Request

Reset

REQUESTING PTO: You can also check on the status of your PTO request by clicking on the blue Status box in the middle box shown in the example below. The status will say Pending until it is Approved or Denied. If you want to check your PTO balance, do that by clicking on the Balances box.

📅 Time Off

Request | **Status** | Balances

05/28/2017 📅 - 07/03/2017 📅
Select Type ▼
Select Status ▼
Go

Date ▼	Type	Total Hours	Status	Delete
07/03/2017 - 07/03/2017	PTO	8 hrs	Pending	✕

📅 Time Off

Request | **Status** | Balances

Type	Select Type ▼			
<input checked="" type="radio"/> Single Day	Select Type			
Start Date	PTO		06/28/2017	
Start Time	Sick	End Time		
Hours Per Day	0			

Sick time is only eligible in states listed in the Labor Laws by State document in the Communications Binder

APPROVING PTO REQUESTS: The following screens outline how to approve PTO requests. Just enter the last and first name of the individual you're reviewing and click on the orange Search button. It will bring up the individual with their request in yellow for Pending. If you don't see any names, click on the next month or time period as your selection may not be correct.

Benefit Type ▼

Employee Group ▼

Search
Show All
Reset

Salary Type

Employee Status

Request Status Pending **Approved** Denied Canceled Show List View

July 2017 From 07/01/2017 📅 To 07/31/2017 📅 🔄

<< Last Month
This Week
This Month
Next Month >>

Sunday	Monday	Tuesday	Wednesday
25	26	27	28
			29

De-select Approved if you only want to see requests that are pending approval

APPROVING PTO REQUESTS: Click on the Yellow box with the employee name; the Time Off box will open. Review the time frame requested and Approve or Deny the request. Always click on Save

LORIS GIFTS INC [37565]

Applications Home **Employees** Payroll Reports Configuration

Home Time Card Schedules **Time Off Calendar** Time Card Approvals

Time Off Requests

First Name	<input type="text" value="Marilyn"/>	Cost Center	<input type="text" value="Unassigned"/>
Last Name	<input type="text" value="Sell"/>	Payroll Policy	<input type="text" value=""/>
Benefit Type	<input type="text" value=""/>	Salary Type	<input type="text" value="--All--"/>
Employee Group	<input type="text" value=""/>	Employee Status	<input type="text" value="Active"/>

Search Show All Reset

Request Status Pending Approved Denied Canceled Show List View

July 2017 From 07/01/2017 To 07/31/2017 << Last Month This Week This Month Next Month>>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
25	26	27	28	29	30
2	3 Sell, Marilyn - 8 hrs	4 Independence Day	5	6	7

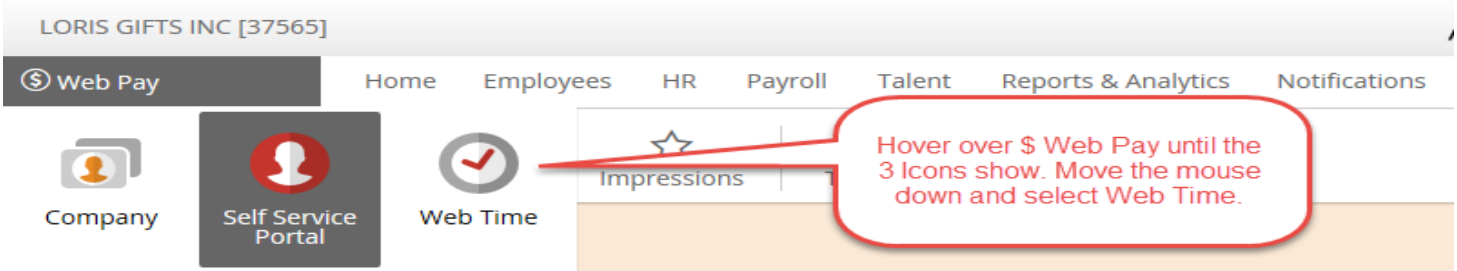
Time Off ×

Status	1 Pending
Date	07/03/2017
Employee	Sell, Marilyn
Type	PTO
Hours	8 hrs
Start	08:00 AM

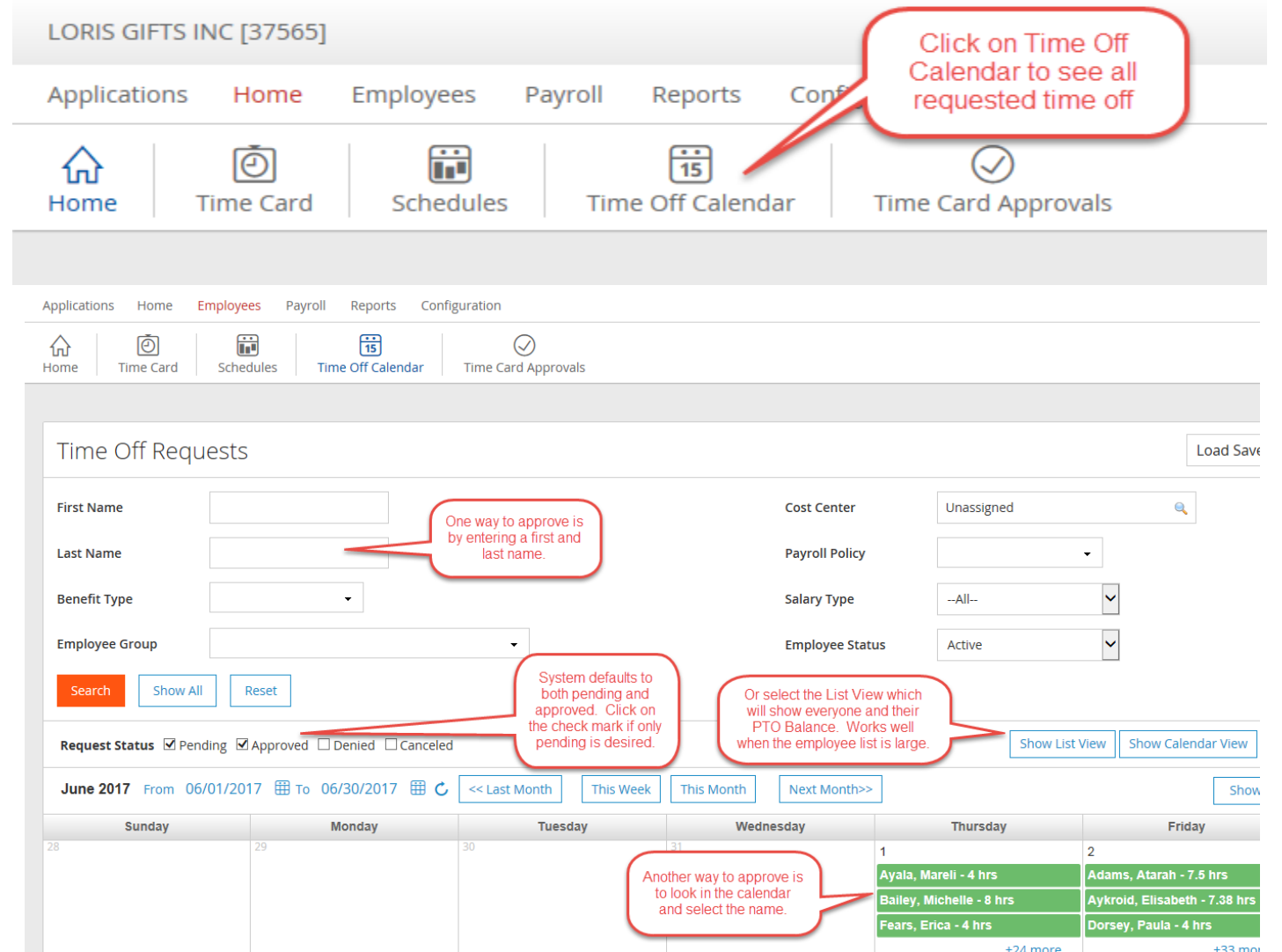
Click on the appropriate box to Approve or Deny

✕ Delete Request
✕ Deny
⊙ Approve
🔗 Detailed View

APPROVING PTO REQUESTS: Hover over \$ Web Pay until the 3 Icons show. Click on the Web Time Icon. Click on the Yellow box with the employee name; the Time Off box will open. Review the time frame requested and Approve or Deny the request. Click on the Time Off Calendar Icon. You will see the Time Off work area. It has 3 Blue Icons for Requests, Status, and Balances. Click on the one appropriate to your activity. Select the Type which will be PTO in most cases. Fill in the rest of the information such as Single or Multiple Days, the start date and end date, time and the number of hours requested. Add any notes intended for the supervisor. Click on the orange Submit Request Box. An email notification will be sent to your supervisor. You will receive an email when it is approved. You can also check on the status by clicking on the blue Status box in the middle. If you want to check your PTO balance, do that by clicking on the Balances box.



APPROVING PTO REQUESTS: Next click on the time off calendar to see requests submitted.



APPROVING PTO REQUESTS: If requesting by name, enter the first and last name and then click on the orange Search

LORIS GIFTS INC [37565]

Applications Home **Employees** Payroll Reports

Home Time Card Schedules Time Off Calend

Time Off Requests

First Name

Last Name

Benefit Type

Employee Group

APPROVING PTO REQUESTS: If requesting from the calendar, click on the person in the box. Yellow means pending, green means approved.

Request Status Pending Approved Denied Canceled Show List V

June 2017 From 06/01/2017 To 06/30/2017 << Last Month This Week This Month Next Month >>

Sunday	Monday	Tuesday	Wednesday	Thursday
8	29	30	31	1
				Hamilton, Tanya - 4 hrs

Time Off X

Status	1 Pending
Date	06/01/2017
Employee	Hamilton, Tanya
Type	PTO
Hours	4 hrs
Start	08:00 AM

When an employee is selected by clicking on their name once, this status box provides for you to select Approve or Deny

X Delete Request X Deny Approve / Detailed View

Once the approval or denial is selected in the time off box to the left, an email will be sent to the employee communicating the status of their request. Always click on the Save button.

APPROVING PTO REQUESTS: If requesting from a list, click on the person in the box. Click on the Show List View in the blue box.

Time Off Requests Load Saved Filter

First Name Cost Center

Last Name Payroll Policy

Benefit Type Salary Type

Employee Group Employee Status

Request Status Pending Approved Denied Canceled

June 2017 From 06/01/2017 To 06/30/2017 << Last Month This Week This Month Next Month>>

Check both This Month and Next Month to insure all request have been reviewed.

If your preference is reviewing requests in a list, click on this button.

Applications Home **Employees** Payroll Reports Configuration

Time Off Requests Load Saved Filter

First Name Cost Center

Last Name Payroll Policy

Benefit Type Salary Type

Employee Group Employee Status

Request Status Pending Approved Denied Canceled Partial

From 06/01/2017 To 06/30/2017 << Last Month This Week This Month Next Month>>

All	Submitted	Employee	Employee Number	Status	Request Start	Hours	Days	Benefit	As of Last Payroll			Future
									Balance	Used	Available	
<input type="checkbox"/>	06/01/2017 10:21 PM	Adams, Atarah		Approved	6/2/2017 1:30:00 PM	7.5 hrs	1	PTO	17.74 hrs	7.5 hrs	10.24 hrs	0 hrs
<input type="checkbox"/>	06/08/2017 12:37 PM	Alvarez, Claudia		Pending	6/2/2017 6:30:00 AM	8.5 hrs	1	PTO	57.26 hrs	0 hrs	57.26 hrs	0 hrs
<input type="checkbox"/>	06/09/2017 07:30 AM	Alvir, Alma		Approved	6/8/2017 12:00:00 PM	1 hrs	1	PTO	11.1 hrs	2 hrs	9.1 hrs	0 hrs
<input type="checkbox"/>	06/07/2017 11:14 AM	Arocho, Cynthia		Approved	6/7/2017 7:30:00 AM	7 hrs	1	PTO	54.77 hrs	0 hrs	54.77 hrs	0 hrs
<input type="checkbox"/>	06/07/2017 11:15 AM	Arocho, Cynthia		Approved	6/7/2017 7:30:00 AM	21 hrs	3	PTO	54.77 hrs	0 hrs	54.77 hrs	0 hrs
<input type="checkbox"/>	06/02/2017 06:00 PM	Ayala, Mareli		Approved	6/8/2017 12:00:00 PM	4 hrs	1	PTO	18.76 hrs	4 hrs	14.76 hrs	0 hrs
<input type="checkbox"/>	06/01/2017 8:00:00 AM	Elisabeth		Approved	6/2/2017 8:00:00 AM	7.38 hrs	1	PTO	38.69 hrs	8 hrs	30.69 hrs	0 hrs
<input type="checkbox"/>	06/02/2017 8:00:00 AM	Michelle		Approved	6/1/2017 8:00:00 AM	8 hrs	1	PTO	56.03 hrs	8 hrs	48.03 hrs	8 hrs
<input type="checkbox"/>	06/02/2017 02:10 PM	Bailey, Michelle		Approved	6/16/2017 8:00:00 AM	8 hrs	1	PTO	56.03 hrs	8 hrs	48.03 hrs	8 hrs
<input type="checkbox"/>	06/02/2017 08:29 AM	Barahona, Jennie		Approved	6/26/2017 8:00:00 AM	40 hrs	5	PTO	41.28 hrs	0 hrs	41.28 hrs	80 hrs

Page 1 of 14 Displaying items 1 - 10 of 14

The list will show when 2 employees have requested time off during the same period of time. The submitted column shows when the request were made.

Click on the Save button to save your entries.

Click on the check box and then click on the

RECEIVING YOUR PAYCHECK ON AN aline card: An aline card is used for employees who don't have a bank checking or savings account for direct deposit. This is the only alternative to receiving your pay check as no paper checks are distributed. This service is offered through ADP. Follow these instructions for setting up this option:

1. When a new employee completes their On-boarding documents on-line, they select how they would like to be paid. If their selection is an aline card, Payroll receives a notification. The store manager gives an envelope containing the card to the employee and records the Proxy ID number on the top in an email to Payroll@lorisgifts.com. Payroll will activate that number for the employee in 24 hours. Once the activation occurs, a pin and balance alert is set up by the employee by either on-line activation with their home computer at mycard.adp.com or by phone at 877 ADP-4321 (877.237.4321) which is open 24/7. Please be sure to sign the back of your card. Read the Cardholder Agreement.
2. Also included in the aline envelop are 2 aline checks. You can use the check as a standalone self issued payroll check to receive your full net pay if you wish to receive you pay via paper check. You are not required to activate your aline card to use the aline check. On pay day, the check must be made payable to yourself for your full net pay and dated. Call 877.237.4321 to authenticate the check and write the authentication number provided on the check in the blocks. Once authenticated, the check can be deposited in an account or cashed for free at any branch of the bank listed on the check.
3. Review the paperwork in the aline envelop to understand fees that may be associated with each type of transaction.
4. You can chose to discontinue the use of an aline card deposit by changing your payroll option in Paylocity. This will be discussed in the next section.



Follow the instructions on the green sticker to activate the card.

Complete and Keep For Your Records **Check Number** 0044409835

Date: _____ Amount: USD \$ _____

Pay to the Order of: _____

Mandatory Authentication Number
Please call (877) 237-4321

VERIFY DOCUMENT AUTHENTICITY - COLORED AREA MUST CHANGE IN TONE GRADUALLY AND EVENLY FROM DARK AT TOP TO LIGHTER AT BOTTOM

56-382/412
Check Number: 0044409835
Date: _____

Pay to the Order of: _____ Amount: USD \$ _____ Dollars

In the Amount of: _____

Void after 180 days from date set forth above
Not valid for an amount in excess of \$2,500

Mandatory Authentication Number
Please call (877) 237-4321

This check is void if there is no authentication number listed in the box. Payee: Verify the validity of this check, by calling (866) 840-2930.
ISSUED BY ADP PAYROLL SERVICES, INC.

ADP *MC Stahl*
ADP AUTHORIZED SIGNATURE

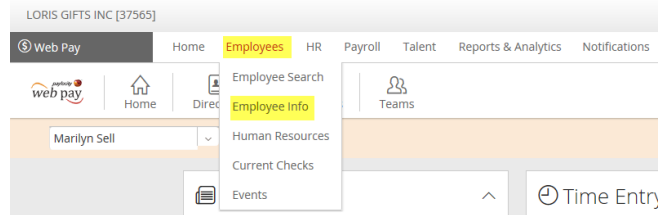
Payable if Desired at any Wells Fargo branch including, 171 17th St. N.W., Atlanta, GA. 30363

⑈0044409835⑈ ⑆04 2038 24⑆ 9600 5303 7⑈

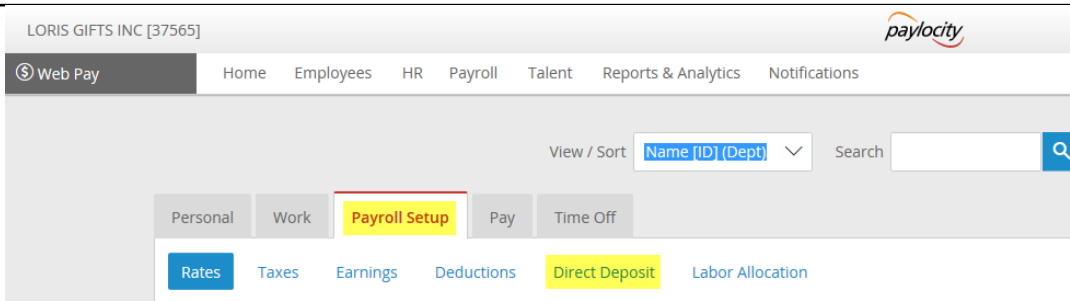
THE ORIGINAL DOCUMENT HAS AN IRIDESCENT WATERMARK ON THE BACK. HOLD AT AN ANGLE TO VIEW WHEN CHECKING THE EMBOSSMENT.

Changing bank accounts or changing from an aline card to a bank account: If you want to change from the current bank account to a new one, want to have money sent to a secondary bank account or switch from an aline card, complete the following steps:

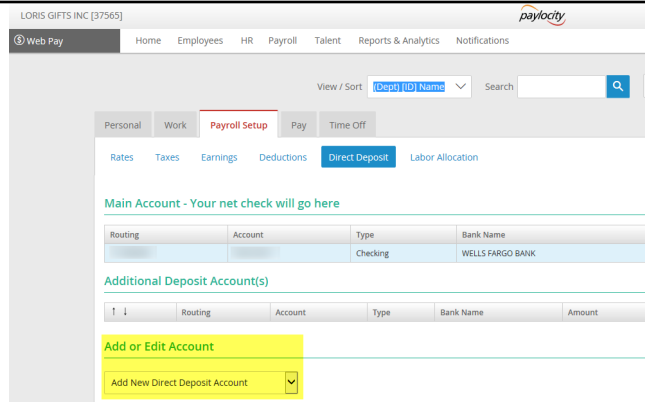
1. Log into the Self-Service Portal and get to your HomePage; click on 'Employees' at the top of the page highlighted below.
2. Select Employee Info from the drop down options



3. Click onto the Payroll Setup tab where you will click on the Direct Deposit option.



4. The screen below will show the existing Direct Deposit information and allow you to add or edit any account. Click on the yellow highlighted section.



5. Main Account is where your main check will go. Below you will see the lower part of the pay screen where detail is added. Make sure the routing and account numbers are entered correctly. There is an example at the bottom of the screen. **Save**

Bank Account

Account Type:

Account Number:

Name on Account:

Name should match the name on file with your banking institution

ADD A NEW BANK ACCOUNT

Additional Deposit Account

Amount Type:

Amount:

Routing Number:

Bank Name:

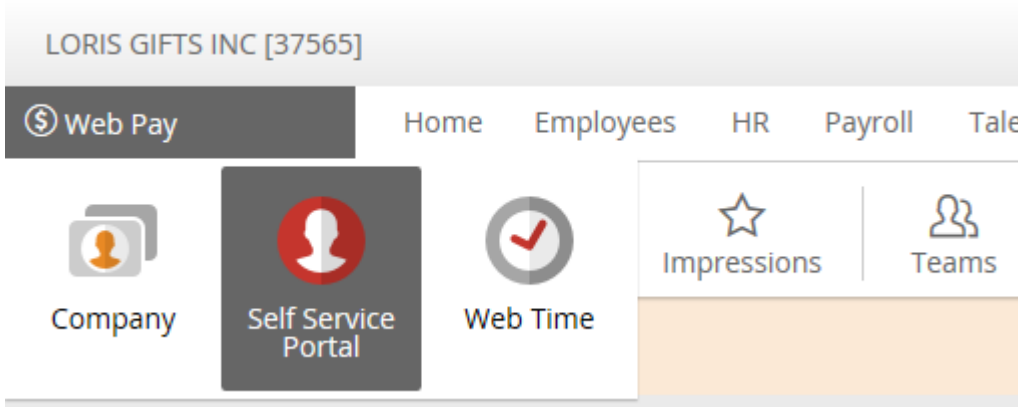
Account Description:

Pre-Note Date: Skip Pre-Note

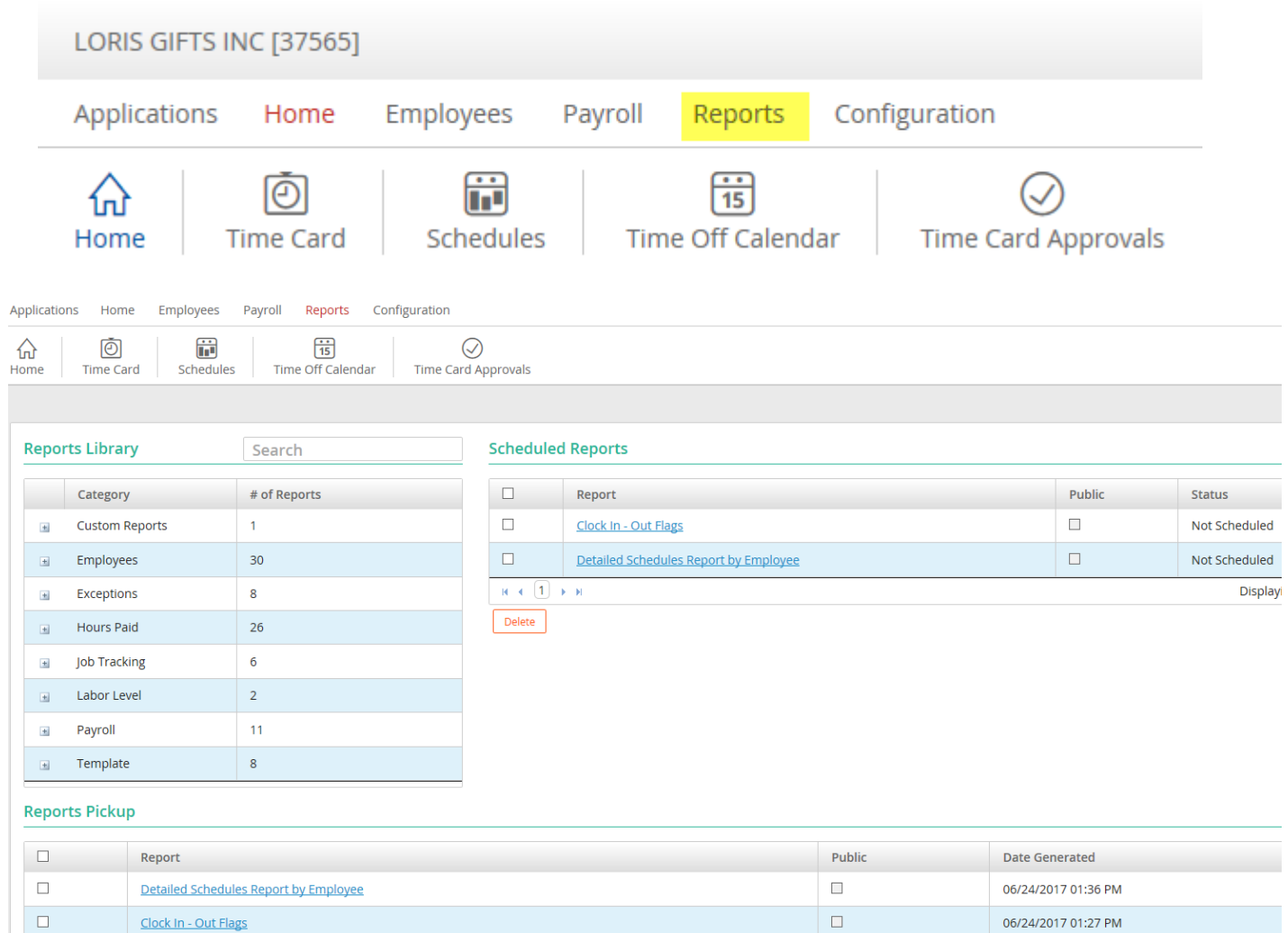
Block Special?

USING THE REPORTING FEATURE: Reporting is extensive in Paylocity. There are many reports available. The review below is for the Employee Time Card Report with the principles being similar for other reports. More detailed information will come at a later date.

1. Hover over \$ Web Pay until the 3 Icons Show. Click on Web Time.



2. Click on the Reports section highlighted below in yellow. The report screen will display with options to select.



A report library is listed on the left. The most commonly used report will be in the **Hours Paid** group. Click on the box with the + sign and a group of reports will show. Select the **Employee Time Card Report**.

LORIS GIFTS INC [37565]

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Reports Library

Search

	Category	# of Reports
+	Custom Reports	1
+	Employees	30
+	Exceptions	8
-	Hours Paid	26

- [-Approaching Weekly Overtime - No Schedules](#)
- [-Approaching Weekly Overtime Report](#)
- [Employee Time Card Report](#)
- [Employee Time Cards \(Landscape\)](#)
- [Employee Time Cards with Notes](#)
- [-Employee Timecards By Cost Center](#)
- [-Employee Timecards by Cost Center with Notes](#)
- [IP Address Punches](#)
- [Lunch Break Details](#)
- [-Master Timecard Detail](#)

Scheduled Reports

	Report
<input type="checkbox"/>	Clock In - Out Flags
<input type="checkbox"/>	Detailed Schedules Report by Employee

⏪
⏩

1

⏪
⏩

Delete

Paylocity Time and Attendance User Guide (replaces ADP User Guide) July 1, 2017

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You will be shown the Create a Report Wizard that allows for maximum flexibility. Name your report, include Codes, generate the report for, Cost Center filters, Sorting, Format (PDF or Excel), extra Filters, date range selections, a scheduler with dates/times to run, and who to email it to. Be sure to select the **Generate My Report** button. At the bottom of the screen will be the Reports Pickup where you will find the report. Don't let reports accumulate. Delete them by clicking in

Create a "Employee Time Card Report" Report

Description:

This report lists employee's actual clock in / clock out times and the total time paid for each punch, for a specified date range. The reports lists an individual employee or employees that belong to a specific group. (The clock in/out times are not rounded)

Report Information:

Name:

Type:

Include Codes for:

Include Codes for:

Include Shift Differentials

Include Approved By Names

Include Signature Lines

Page Break After Each Employee

Custom Text After Each Employee:

Include Exception Code Legend

Include Audit Trail

Subtotal By Week

Generate Report For:

Employee Group:

Employee Number:

Generate Report:

As soon as possible

At this time

In this timezone:

On: Date:

Daily Include Weekends

Weekly on:

Bi-weekly on: Start after next occurrence

Semi-monthly on:

Monthly on day of the month

Enter email to send report as attachment when completed:

**To send to more than one email address separate emails by commas*

Generate my Report:

Cost Center Filter:

[Cost Center Filter](#)

Sort By:

Sort Order:

Report Format:

Report Format:

Extra Option/Filters

Exempt Filter

- All
- Exempt
- Non Exempt

Salary Filter

- All
- Hourly
- Salary

Include inactive employees

Date Range

If choosing a pay period, use the following payroll policy to determine the pay period date ranges

- Current Pay Period
- Previous Pay Period
- Yesterday
- Today
- User Defined

From:

To:

The following are a list of frequently asked questions for your reference:

When do I get paid?

The annual Payroll Calendar is provided by Payroll in the each January.

- This will assist on monitoring monthly budgeted hours, signing off time cards on sign off Mondays and understanding when the actual pay dates are for each pay period.
- This calendar will be kept in the Communication's Binder, behind the Corporate Schedule.
- A Payroll Calendar with pay dates is provided to each new employee. By reviewing their start date on the calendar and corresponding pay date with the new hire, they will be able to plan their finances.

What are the Labor Laws and Compliances required in our store's state?

- Labor Laws by State / Mandatory Compliance and Important Labor and Payroll Laws as of 7/1/17 is located in the Communications Binder under the Schedules TAB

Do I have to report my banking hours each pay period to Lingling?

- Paylocity now provides for you to clock in/out and use the Banking type. If this is done consistently, no email is needed.

What if I can't find an answer to my question?

- Help is available at payroll@lorisgifts.com. If you can't reach someone, send an email to Helpdesk@lorisgifts.com and the email will be forwarded to Payroll. After the first run through, this gets easier. Thanks for your patience. We know you'll find this application user friendly and pretty too!

How much training time does an employee get?

- If the employee is new to Lori's, 20 hours for Sales Associates, 40 hours for Assistant Managers and 80 hours for Managers. However, if the employee is promoted for Sales Associate or Assistan Manager to the next level, 20 more hours are given to the promoted Assistant Manager and 40 more hours are given to the promoted Manager. If additional hours are required, approval must be obtained from Lingling Chou at lchou@lorisgifts.com before they are used.

How is Holiday pay handled?

- Hourly associates that work the holiday will be paid at a rate of time and a half for the hours worked. Any full time manager that work the holiday will be credited with 8 hours in their PTO account to be used any time they would like with managerial approval.

My scheduling application is not working correctly?

- If the PC's version of Internet Explorer is not up to date, this creates this problem. Contact helpdesk@lorisgifts.com

Where are the aline cards kept in the store, how many should I have and how do I get more?

- A store should keep 5 aline cards on hand in the Office Anywhere crate in the Direct Deposit & Aline Pay Card folder. More can be obtained by emailing Payroll@lorisgifts.com

How long does it take to get a new employee into Paylocity?

- New employees are expected to complete their new hire paperwork during the on-boarding screens in Equifax. If this is done prior to their first day, an employee will be there when they start. However, if they use the store's computer to complete their on-boarding, it will take another day for the employee to show in Paylocity. So do on-boarding early.

What if I need additional hours over my Corporate Schedule to run a special event?

- Hours over the Corporate Schedule must be approved in advance by sending an email to Lingling at lchou@lorisgifts.com. Requests are approved when stores agree to generate \$50 per hour to cover the hours.