

Welcome!

We'll be starting shortly

AVANTI

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Skill-Up with Avanti

**Essentials for Managers:
Web Portal Features II**

Agenda

- **Housekeeping items**
- **Recap of Web Portal Features I**
- **How time flows from Availability into Time Data**
- **How to add new codes to Web Templates**
- **How to use filters on the web portal**
- **How to troubleshoot template, time entry, and scheduling**

The Client Care Team

> Everyone who makes support possible



Marlo



Mia



Matt



Court



Dorothy



Marianne



Nicole



Amanda



Lindsay



Kunal



Session Duration

Today's session is 45 minutes.

A recording of today's session will be posted to our Learning Hub after the webinar at **learn.avanti.ca**.



Ask Questions

Please ask any questions in the Q&A area and we will respond.

Missed the answer to your question? Not to worry – we will be posting a full Q&A response sheet in our **Help Centre** after the webinar.

Avanti Cloud Client

> This marks a significant milestone for all of us

AVANTI

Thank
you

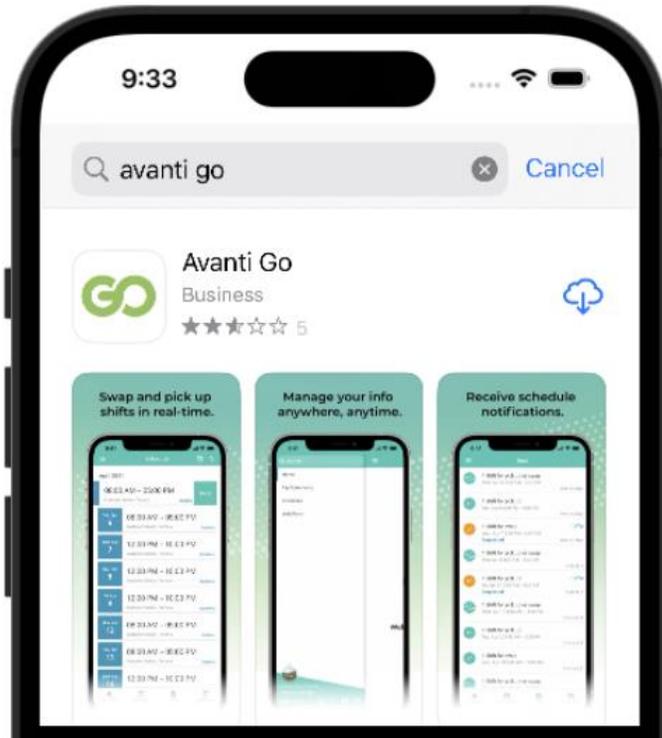
Avanti Horizons Hub

> Centralized resource for upcoming changes to our Avanti solution

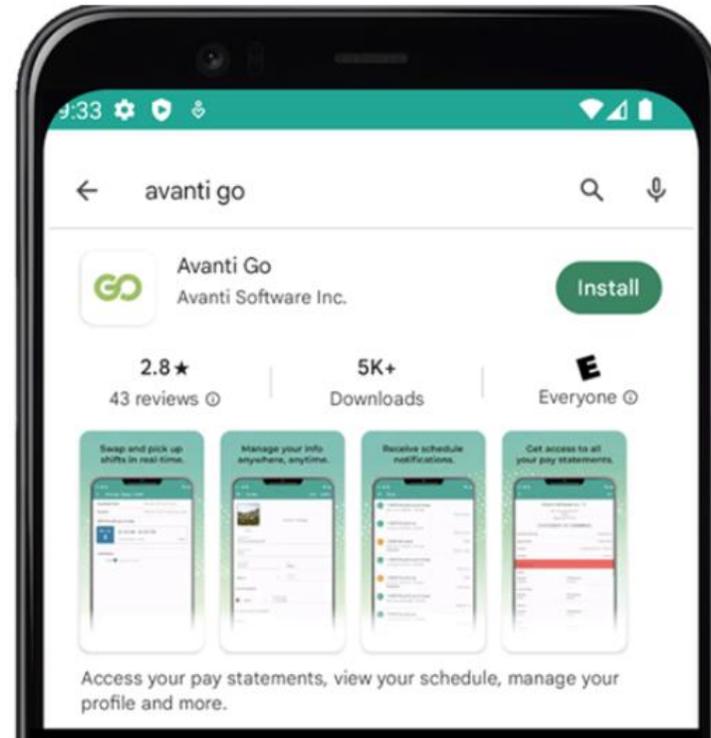
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The screenshot displays the Avanti Horizons Hub website. At the top, there is a navigation bar with the Avanti logo on the left and a search bar, 'Client Support Portal' link, and 'Watch Demo' and 'Get Started' buttons on the right. Below the navigation bar, the main heading reads 'AVANTI HORIZONS' in teal, followed by 'What to expect' in large black font. A sub-heading states: 'Here's an overview of the exciting changes coming to the Avanti Self-Service Portal (ASSP) and what those mean for you and your employees.' On the left side, there is a dark sidebar with the heading 'Help Centre Resources' and a list of links: 'ASSP Changes', 'Upcoming Changes', 'Your New ASSP Web Addresses and Sign Ins', 'Changes for Employees', and 'FAQ'. The main content area on the right contains a paragraph: 'The Avanti Horizons Hub is your centralized resource for upcoming changes to our platform. From here, you can access helpful guides and information to proactively plan ahead and make change management a breeze. As your change management partner, we want to empower you to navigate these changes with confidence and ease.' Below this is a teal callout box with the heading 'When are these changes coming?' and the text: 'We're taking a phased approach with clients and will be kicking off the transition with our first group in late April to early May. Don't worry - you'll receive specific communications from us when it's your turn. Keep an eye on your inbox!'

iOS



Android





Let's get started!

User Groups & Role Assignments

> Recap of Essential for Managers Web Portal Features I



Avanti User Groups

- ✓ Defines user access to either Desktop, Web Portal or both
- ✓ Allows only certain User Groups to access specific Menu Items in the system

User Role Assignments

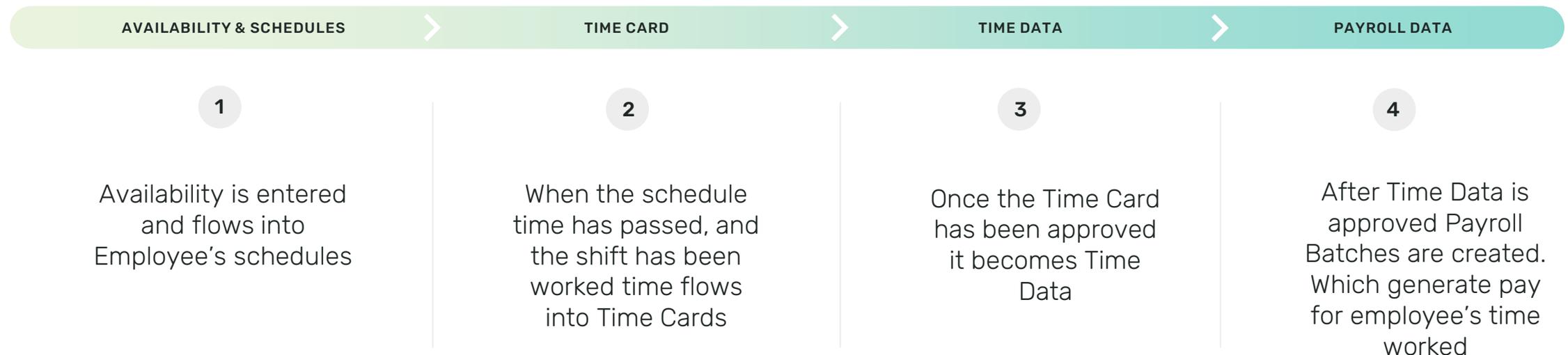
- ✓ Role Assignments control how users access employee data
- ✓ Limit access to certain employee positions
- ✓ Controls the ability to insert, modify, view and delete employee data

The Flow of Time in Avanti

> From Availability to Payroll

How time management flows from Availability to Payroll

This is customizable, depending on how time tracking is implemented, so you may encounter different setups from the one we will be demonstrating today. Each of our clients has the option to choose the features that best suit their needs.



How to Navigate Schedules

> Breakdown

Scheduling in Avanti

- ✓ A method of organization and planning employee's time
- ✓ Schedules will allow you see at a glance employees availability and assigned shifts
- ✓ These schedules will carry into Time Cards and eventually into Payroll

Time Entry Approval > Schedule Approval

AVANTI

Schedule Approval

07-Apr-2024 20-Apr-2024 Times Refresh Options Sort Show Availability

Approvals - Edit - Assignment - Roll Schedules - Totals/Rules Check Leave Entitlements Coverage Grid Results

Employee	Total	Sun, 07-Apr-2024	Mon, 08-Apr-2024	Tue, 09-Apr-2024	Wed, 10-Apr-2024	Thu, 11-Apr-2024	Fri, 12-Apr-2024	Sat, 13-Apr-2024	Sun, 14-Apr-2024	Mon, 15-Apr-2024	Tue, 16-Apr-2024
000001001 - Angel Smith General Manager	90.00		7:00 AM - 4:00 PM			7:00 AM - 4:00 PM	7:00 AM - 4:00 PM				
000001003 - Rick Hanson General Manager	90.00		7:00 AM - 4:00 PM			7:00 AM - 4:00 PM	7:00 AM - 4:00 PM				
000001005 - Dee Smith General Manager	90.00		7:00 AM - 4:00 PM			7:00 AM - 4:00 PM	7:00 AM - 4:00 PM				
000001006 - Alan Anderson Shop Manager - Plant A	90.00		7:00 AM - 4:00 PM			7:00 AM - 4:00 PM	7:00 AM - 4:00 PM				

How-To Troubleshoot Common Questions

> Common questions about the Web Portal

AVANTI

Q

How to troubleshoot an employee schedule that did not roll forward?



A

Check the Employee's Profile, ensure they have a Work Group and Schedule Template on the Employment Data Tab

How-To Troubleshoot Common Questions

> Common questions about the Web Portal

The screenshot displays the 'Care_Webinar - Employee Profile' window. The left sidebar contains a navigation menu with categories such as Personal, Dates, Values, Employment Data (highlighted), Payment Method, Tax Factors, Documents, Positions, Variable Values, Time Entry Documents, Earnings, Deduction/Benefits, Totals, Documents and Reviews, Payment Inquiry, View Tax Slip Images, Benefits Administration, and Human Resources. The main content area is titled 'Employment Data' and contains various fields for configuration. A green box highlights the 'Work Group' and 'Schedule Template' fields.

Field	Value
Pay Group	001 Bi-Weekly
Location Code	2000 South Calgary
Vacation Group	01 Vac - AB1
Vacation Option	Accrued
Vacation Earn Code	000
Vacation Percentage	6.00%
Worker's Comp	001 WCB - Alberta
Union Code	
Position Code	A0050 General Manager
Benefit Group	01 Single
Defaults Group	HO-1 Head Office Mgt 1
G/L Option	Account
G/L Account	10000-1000-10001 Payroll-HO-Star HO
G/L Benefit Group	0001 General Benefit Group
Work Group	01 W GRP Work Group - General
Schedule Template	0001 Monday-Friday 7am to 4pm
Basic Rate	45.0000 Per Hour
Reports To Pos.	A0001 CEO
Reports To Emp.	000001078 Doe, Erica

How to Navigate Time Entry Templates

> Breakdown

Time Entry Templates

- ✓ Are used by employees for entering time
- ✓ Different views can be selected to fit your organizations needs as they are highly configurable
- ✓ Each view created will be a separate tab on Time Entry – there are 4 types of views:

The screenshot displays the AVANTI Time Card Entry interface. On the left is a sidebar with navigation options: Employee Directory, Available Leave, Personal Info, Availability, Employee Schedule, Time Card Entry (highlighted), Time Data, and Time Off. The main content area is titled 'Time Card Entry' and features a search bar, a notification bell with a '3' badge, and a user profile icon 'M'. Below the title are four view tabs: 'Time Card - Single Day View' (selected), 'Time Card - Date Range View', 'Time Card - Pay Period View', and 'Time Card - Calendar View'. The interface shows a card for '000001001 - Angel Smith' on '08-Apr-2024' using a 'Time Card Template'. Action buttons include '+ Add', 'Delete', 'Edit', 'Entitlements', 'Approve', 'Unapprove', 'Cancel', and 'Undo Cancel'. A 'Save Changes' and 'Refresh' button are also present. A table below lists card details:

<input type="checkbox"/>	Card Date	Pay Code	From Time	To Time	Shift	Unit	Unit Code	Status	Pay
<input type="checkbox"/>	08-Apr-2024	REGULAR - Regular Time-New	07:00 AM	04:00 PM	01 SHIFT - 8 Hours Day Shift 7...	9.00	Ho...	Unapproved	
Totals		Hours: 9.00							

How to Navigate Time Entry Templates

> Breakdown of Single Day view

Single Day

- ✓ Entries for each day will be displayed when the date is selected from the lookup

The screenshot displays the AVANTI Time Card Entry interface. The top header features the AVANTI logo on the left and search, notification, and user profile icons on the right. The main content area is titled "Time Card Entry" and includes a navigation bar with four view options: "Time Card - Single Day View" (highlighted with a red box), "Time Card - Date Range View", "Time Card - Pay Period View", and "Time Card - Calendar View". Below the navigation bar, there are filters for employee (000001001 - Angel Smith) and date (08-Apr-2024), along with a "Time Card Template" dropdown. A toolbar contains buttons for "+ Add", "Delete", "Edit", "Entitlements", "Approve", "Unapprove", "Cancel", "Undo Cancel", "Save Changes", and "Refresh". The main area contains a table with the following columns: Card Date, Pay Code, From Time, To Time, Shift, Unit, Unit Code, Status, and Pay. A single entry is shown for 08-Apr-2024 with a pay code of "REGULAR - Regular Time-New", from time of 07:00 AM, to time of 04:00 PM, shift of "01 SHIFT - 8 Hours Day Shift 7...", unit of 9.00, and status of "Unapproved". A "Totals" row shows "Hours: 9.00".

<input type="checkbox"/>	Card Date	Pay Code	From Time	To Time	Shift	Unit	Unit Code	Status	Pay
<input type="checkbox"/>	08-Apr-2024	REGULAR - Regular Time-New	07:00 AM	04:00 PM	01 SHIFT - 8 Hours Day Shift 7...	9.00	Ho...	Unapproved	
Totals		Hours: 9.00							

How to Navigate Time Entry Templates

> Breakdown of Date Range View

Date Range

- ✓ A specified date range can be selected to determine the entries displayed

The screenshot displays the AVANTI Time Card Entry interface. The top navigation bar includes the AVANTI logo, a search icon, a notification bell with a '3' badge, and a user profile icon 'M'. Below the header, there are four view tabs: 'Time Card - Single Day View', 'Time Card - Date Range View' (highlighted with a red box), 'Time Card - Pay Period View', and 'Time Card - Calendar View'. The main content area shows a filter for '000001001 - Angel Smith' and a date range of '01-Apr-2024 - 30-Apr-2024'. Below the filters are buttons for '+ Add', 'Delete', 'Edit', 'Entitlements', 'Approve', 'Unapprove', 'Cancel', and 'Undo Cancel'. On the right side, there are 'Save Changes' and 'Refresh' buttons. The main table lists time card entries with columns for Card Date, Pay Code, From Time, To Time, Shift, Unit, Unit Code, Status, and Pay. The table contains six entries, all with a status of 'Unapproved'. A 'Totals' row at the bottom shows 'Hours: 35.00' and 'Days: 1.00'.

	Card Date	Pay Code	From Time	To Time	Shift	Unit	Unit Code	Status	Pay
<input type="checkbox"/>	08-Apr-2024	REGULAR - Regular Time-New	07:00 AM	04:00 PM	01 SHIFT - 8 Hours Day Shift 7...	9.00	Ho...	Unapproved	
<input type="checkbox"/>	05-Apr-2024	REGULAR - Regular Time-New	07:00 AM	04:00 PM	01 SHIFT - 8 Hours Day Shift 7...	9.00	Ho...	Unapproved	
<input type="checkbox"/>	04-Apr-2024	REGULAR - Regular Time-New	07:00 AM	03:00 PM	01 SHIFT - 8 Hours Day Shift 7...	8.00	Ho...	Unapproved	
<input type="checkbox"/>	04-Apr-2024	FLOATDAY	10:00 AM	11:00 AM		1.00	Ho...	Unapproved	
<input type="checkbox"/>	04-Apr-2024	REGULAR - Regular Time-New	11:00 AM	07:00 PM	01 SHIFT - 8 Hours Day Shift 7...	8.00	Ho...	Unapproved	
<input type="checkbox"/>	01-Apr-2024	VAC	12:00 AM	12:00 AM		1.00	Days	Unapproved	
Totals		Hours: 35.00		Days: 1.00					

How to Navigate Time Entry Templates

> Breakdown of Pay Period View

Pay Period

- ✓ Allows for a specific pay period to be selected and displayed

The screenshot displays the AVANTI Time Card Entry interface. The top navigation bar shows four view options: 'Time Card - Single Day View', 'Time Card - Date Range View', 'Time Card - Pay Period View' (highlighted with a red box), and 'Time Card - Calendar View'. Below the navigation bar, there is a search bar for employee ID (000001001 - Angel Smith) and a date range selector (30-Mar-2024 - 12-Apr-2024). A toolbar contains buttons for '+ Add', 'Delete', 'Edit', 'Entitlements', 'Approve', 'Unapprove', 'Cancel', 'Undo Cancel', 'Save Changes', and 'Refresh'. The main area features a table with the following columns: Card Date, Pay Code, From Time, To Time, Shift, Unit, Unit Code, Status, and Pay. The table contains seven rows of time card entries, all with a status of 'Unapproved'. A 'Totals' row at the bottom indicates a total of 35.00 hours and 1.00 day.

Card Date	Pay Code	From Time	To Time	Shift	Unit	Unit Code	Status	Pay
08-Apr-2024	REGULAR - Regular Time-New	07:00 AM	04:00 PM	01 SHIFT - 8 Hours Day Shift 7...	9.00	Ho...	Unapproved	
05-Apr-2024	REGULAR - Regular Time-New	07:00 AM	04:00 PM	01 SHIFT - 8 Hours Day Shift 7...	9.00	Ho...	Unapproved	
04-Apr-2024	REGULAR - Regular Time-New	07:00 AM	03:00 PM	01 SHIFT - 8 Hours Day Shift 7...	8.00	Ho...	Unapproved	
04-Apr-2024	FLOATDAY	10:00 AM	11:00 AM		1.00	Ho...	Unapproved	
04-Apr-2024	REGULAR - Regular Time-New	11:00 AM	07:00 PM	01 SHIFT - 8 Hours Day Shift 7...	8.00	Ho...	Unapproved	
01-Apr-2024	VAC - Vacation	12:00 AM	12:00 AM		1.00	Days	Unapproved	
Totals		Hours: 35.00	Days: 1.00					

How to Navigate Time Entry Templates

> Breakdown of calendar view

Calendar

- ✓ Allows for the calendar view to be displayed (e.g. for one month)

The screenshot displays the AVANTI Time Card Entry interface. On the left is a sidebar with navigation options: Employee Directory, Available Leave, Personal Info, Availability, Employee Schedule, Time Card Entry (highlighted), Time Data, Time Off, Time Entry Approval, Administration, Employee Training, Management, Job Postings, and Applicant Management. At the bottom of the sidebar is System Configuration. The main area is titled 'Time Card Entry' and features a top navigation bar with four view options: Time Card - Single Day View, Time Card - Date Range View, Time Card - Pay Period View, and Time Card - Calendar View (which is selected and highlighted with a red box). Below the navigation bar, there is a search bar containing '000001001 - Angel Smith', a 'Time Card Template' dropdown, and a 'Refresh' button. The calendar view shows a grid for April 2024, with columns for each day of the week. Time entry blocks are visible: 'VAC - 1.00 Days' on Monday (01), 'REGULAR - 9.00 Hours' on Monday (08), 'REGULAR - 8.00 Hours' and 'FLOATDAY - 1.00 Hours' on Thursday (04), and 'REGULAR - 9.00 Hours' on Friday (05). The calendar also includes navigation for 'Today', 'April, 2024', and view toggles for 'Month', 'Week', and 'Day'.

How do Time Entry Approval Templates work?

> Breakdown

Time Entry Approval Template

The Time Entry Approval Template have standard views for each of the Approval Templates.

- ✓ Availability Approval
- ✓ Schedule Approval
- ✓ Time Card Approval
- ✓ Time Data Approval

The screenshot displays the AVANTI Time Card Approval interface. On the left is a navigation sidebar with categories like Administration, Employee Training, Management, Job Postings, Applicant Management, Dashboards, Reports, Messages, and Schedules-Testing. The 'Time Card Approval' option is highlighted in the sidebar. The main content area shows a 'Time Card Approval' view for the week of 03-Apr-2024 to 10-Apr-2024. It includes a table with columns for Employee, Total, and days from Wednesday to Wednesday. Each cell in the table contains a status icon (checkmark or 'X') and a time range (e.g., 7:00 AM - 4:00 PM). Some entries show multiple time ranges for a single day, such as 7:00 AM - 3:00 PM and 10:00 AM - 11:00 AM.

Employee	Total	Wed, 03-Apr-2024	Thu, 04-Apr-2024	Fri, 05-Apr-2024	Sat, 06-Apr-2024	Sun, 07-Apr-2024	Mon, 08-Apr-2024	Tue, 09-Apr-2024	Wed, 10-Apr-2024
000001001 - Angel Smith	35.00		7:00 AM - 3:00 PM 10:00 AM - 11:00 AM 11:00 AM - 7:00 PM	7:00 AM - 4:00 PM			7:00 AM - 4:00 PM		
000001002 - Ben Smith	36.00	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM			7:00 AM - 4:00 PM		
000001003 - Rick Hanson	54.00	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM			7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM
000001004 - Alister Adams									
000001005 - Dee Smith	54.00	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM			7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM
000001006 - Alan Anderson	54.00	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM			7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM
000001007 - Brian Smith									
000001008 - Gilbert Greg									
000001009 - Hans Hope									
000001010 - Annie Girl									
000001011 - Cathy More	34.00	7:00 AM - 3:30 PM	7:00 AM - 3:30 PM	7:00 AM - 3:30 PM			7:00 AM - 3:30 PM		
000001012 - Roger Moore	36.00	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM	7:00 AM - 4:00 PM			7:00 AM - 4:00 PM		
000001014 - I ester MrNally									

Time Entry Template vs. Time Entry Approval Templates

> Breakdown of the difference

Time Entry Template

- ✓ For employees to enter in their time.
- ✓ Where managers/supervisors can view a single employee's time entered

Time Entry Approval Template

- ✓ Managers/Supervisors can View, Edit and Approve time for multiple Employees in one go

The screenshot shows the 'Time Card Entry' interface. The breadcrumb is 'Time Card Entry'. The main view is 'Time Card - Single Day View'. The employee selected is '000001005 - Dee Smith' for the date '04-Apr-2024'. The interface includes buttons for '+ Add', 'Delete', 'Edit', 'Entitlements', 'Approve', 'Unapprove', 'Cancel', and 'Undo Cancel'. A table below shows the time entry details:

<input type="checkbox"/>	Card Date	Pay Code	From Time	To Time
<input type="checkbox"/>	04-Apr-2024	REGULAR - Regular Time-New	07:00 am	04:00 pm
Totals		Hours: 9.00		

The screenshot shows the 'Time Entry Approval' interface. The breadcrumb is 'Time Entry Approval > Time Card Approval'. The main view is 'Time Card Approval'. The interface includes buttons for 'Approvals', 'Edit', 'View Unapproved Data', 'Help', 'Totals/Rules', and 'Check Leave Entitlements'. A table below shows the approval status for multiple employees across three dates:

Employee	Employee Position	Total	Mon, 04-Mar-2024	Tue, 05-Mar-2024	Wed, 06-Mar-2024
000001001 - Angel Smith	General Manager	45.00	✓ FLEX	✗ VAC	✓ REGULAR
000001003 - Rick Hanson	General Manager	45.00	✗ REGULAR	✓ REGULAR	✓ REGULAR
000001005 - Dee Smith	General Manager	45.00	✓ REGULAR	✓ REGULAR	✓ REGULAR
000001006 - Alan Anderson	Shop Manager - Plant A	45.00	✓ REGULAR	✓ REGULAR	✓ REGULAR

How-To Troubleshoot Common How to Questions

> Common questions about the Web Portal

AVANTI

Q

How do I add a new Pay Code to the Time Card Template?



A

Let's walk through the steps with a live demonstration!

How-To Troubleshoot Common Questions

> Common questions about the Web Portal

Q

How do I troubleshoot when a manager can't see an employee's Time Card?



A

There could be two reasons:

1. Filters
2. Role Assignments.

How-To Troubleshoot Common Questions

> Common questions about the Web Portal

Q

How do I adjust a Pay Code on a Time Card after it has been approved?



A

Let's walk through the steps with a live demonstration!

How-To Troubleshoot Common Questions

> Common questions about the Web Portal

AVANTI

Q

How do I approve multiple time cards?



A

Let's walk through the steps with a live demonstration!

How-To Troubleshoot Common Questions

> Common questions about the Web Portal

Q

How do I see an employee's entitlements on the web portal?



A

Let's walk through the steps with a live demonstration!



We would love your feedback!

You will receive a short survey after the webinar, and we would really appreciate you providing your feedback.

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avanti.ca/skillup

Thank you

Join us for our next webinars:

- › **Essentials for Navigating Payroll Module Features I**
May 8th, at 11:00 AM MDT
- › **Essentials for Navigating Payroll Module Features II**
June 12th, at 11:00 AM MDT