De: **Austin Beaty** a.beaty@austinlane.com
Asunto: RE: {External} Re: Expense Rate Table - documentation
Fecha: 11 de mayo de 2023, 21:41
Para: Sebastián Camilo Barón Barbosa sebastian.baron@sebastiangrafi.co
Cc: Austin Beaty a.beaty@austinlane.com

AB

Sebastian,

Here is some documentation.

Huddle #1

Password: 22Huddle!

Purpose: Management of Per Diem in multi-state and multi-union companies has become very challenging as the required Per Diem can change frequently depending on the state, union, job and class that an employee is on with a field force that moves from job to job frequently. Many companies need to apply Per Diem daily to their employee time records, which can become time consuming when they have to enter different amounts per employee.

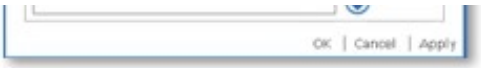
Additionally, some companies may have some special types of Extra items that are needed to pay employees such as Divers for various levels of "Hazard Pay", such as Depth Pay and Penetration Pay. Using divers as a class of employees, these are daily amounts that are calculated based on the diver's maximum depth and penetration in feet, and these rates and calculations vary by union and local. Thus, there is a need for some method to automate this pay to make daily time entry simple for end users, while creating the correct pay amounts in the resulting export to a company's ERP Payroll system.
The Extras Rate Table enhancement module was developed by Austin Lane that efficiently and dynamically calculates Per Diem / Hazard Pay based on entries made by clients into the rate table. For additional efficiency, an option will be added to automatically apply Per Diem from the rate table to the first qualifying record entered each day.

Adding and Enabling the Rate Table

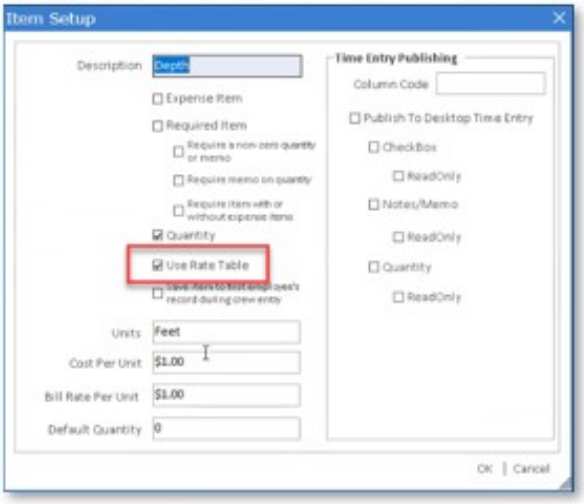
Austin Lane added a new check box within Item Setup titled "Use Rate Table", which addresses clients with complex timekeeping and payroll situations as described above.

1. In the Full Client, click the Time tab. Next click Preferences > Extra and then Configure.
2. A new window titled "Extra Module Configuration" will open up. Create a new Item by clicking Add. In this example, Austin Lane created 3 items:

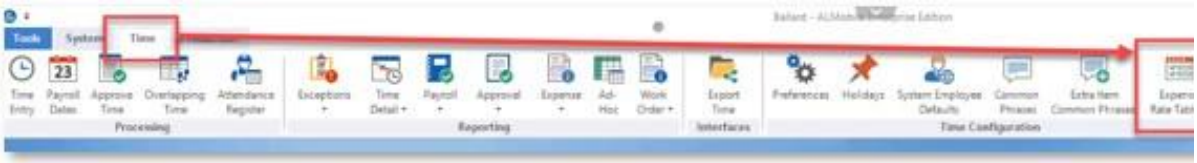




3. Double-click on any item and enable that item by checking the box:



4. To populate the rate table, click on the Expense Rate Tables icon:

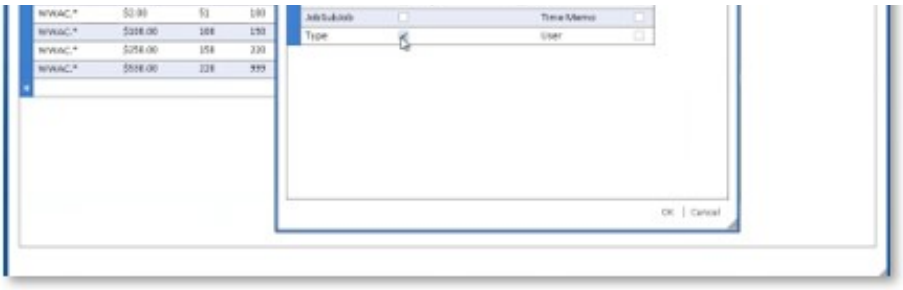


5. Select one of the rate table item(s) that you created and this screen will appear:

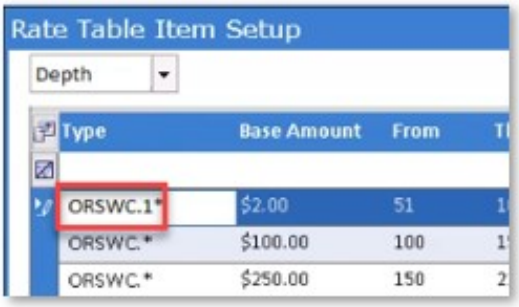


6. Click the green plus button to open the Column Setup screen. Select the appropriate column headers. Of note, Type is Union class. Recommend that you select the least number of column types as possible to keep things simple:





When populating the table, keep in mind that wildcards (*) and matches (?) can be utilized as show under the Type column above (e.g. ORSWC.1* will pick up any class in the 100-range):



Operation Example (Version 12 only)

1. Using two computer screens (best practice), open the Full Client and the Mobile Web Client:

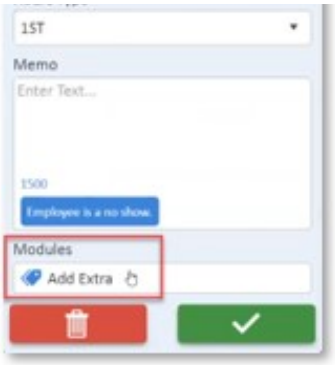
   Full Client: https://traylor.apps.almobile.com
   Mobile Web Client: https://traylor.almobile.com

2. Open the MWC and enter time for a diver. Using Ryan Baker as an example, he has 8 hours but has earned premiums. Click the right-most box, which displays his total worked hours:



3. This will show his summary of hours in a new screen. Tap anywhere on his time record and scroll downwards until you see Add Extra (under Modules). Tap this once:





4. You will see your Extras Items. Click any of the items to enter in the item's quantity. The screen will further open up. Re-tap the item you selected (Depth in this example) and the enter in the quantity and a memo if you'd like. Click the green check mark to complete this entry:





Repeat for the other items, if required.

5. A black colored Extras tag icon will appear in the diver's time record entry, which indicates an Extra was applied:



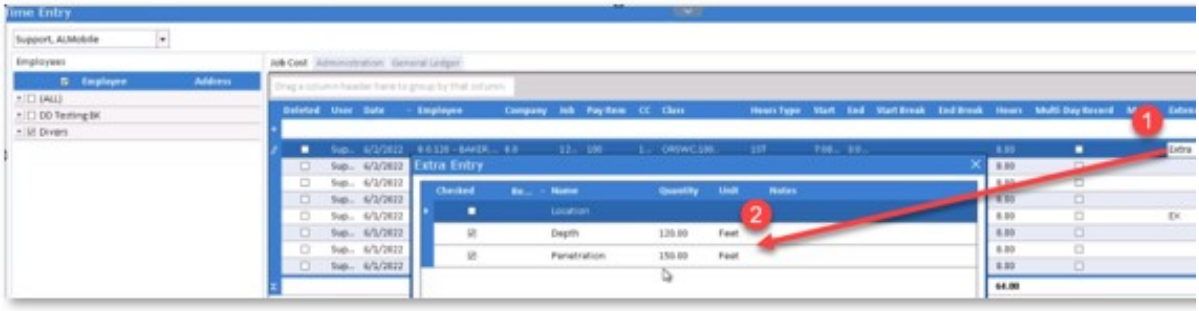
And also displayed as a blue carat in the Grid Time Entry screen:





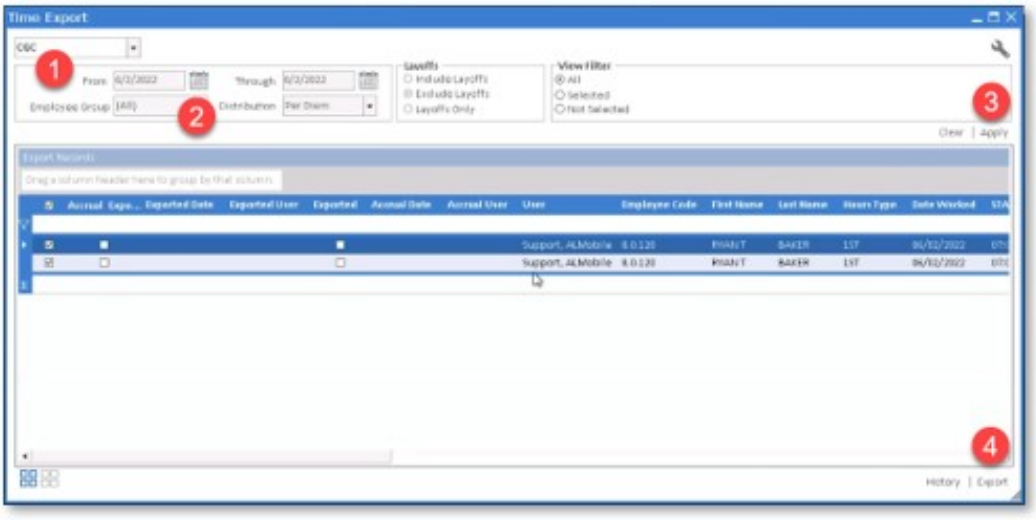
6. Press the green sync button at the bottom of the Grid Time Entry screen, which syncs the record back to the back office team and to the Full Client.

7. In the Full Client, the new time record with premiums should appear. Scroll to the employee and under the Extensions column, select “Extra”. A new window will appear showing the Extras quantities as entered and sync’d from the field. The back office has the ability to change quantities if needed from this screen:



8. To export the time record, make sure you lock the Payroll date.

9. Click Time > Export Time. Enter in a date range (or day) and under Distribution, select Per Diem. Click Apply to finalize the entry:



10. Validate the quantities were correctly applied:





11. Export the record by clicking “Export” at the bottom right hand corner of the window (Red #4 in Step 9 above).
12. Follow the steps outline above to send the time records to your ERP system and for payroll processing.

Austin Beaty
President & CEO
855.272.5555
almobile.com

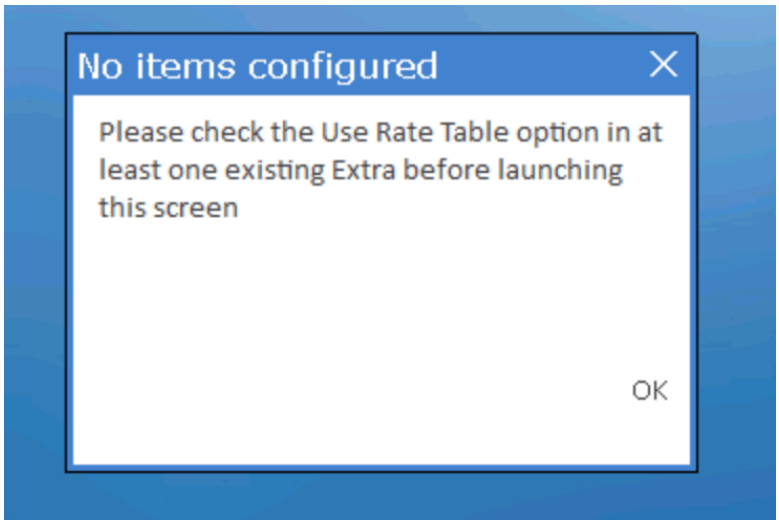
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From: Sebastián Camilo Barón Barbosa <sebastian.baron@sebastiangrafi.co>
Sent: Thursday, May 11, 2023 11:58 AM
To: Austin Beaty <a.beaty@austinlane.com>
Subject: {External} Re: Expense Rate Table

Hi Austin, can you send me documentation from this screen, I think we missed it because of this message:



Any ideas how to make it run? And what it is for? Thanks!

Sebastián Barón
CREATIVO GRÁFICO DIGITAL
sebastiangrafi.co
+57 318 441-3949
sebastian.baron@sebastiangrafi.co

> El 11/05/2023, a las 17:26, Austin Beaty <a.beaty@austinlane.com> escribió:
>
> Sebastian,
>
> The Expense rate table is not working in Figma. Thanks!
>
> <image001.png>
>
> <image002.jpg>