

# 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

AVANTI



**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

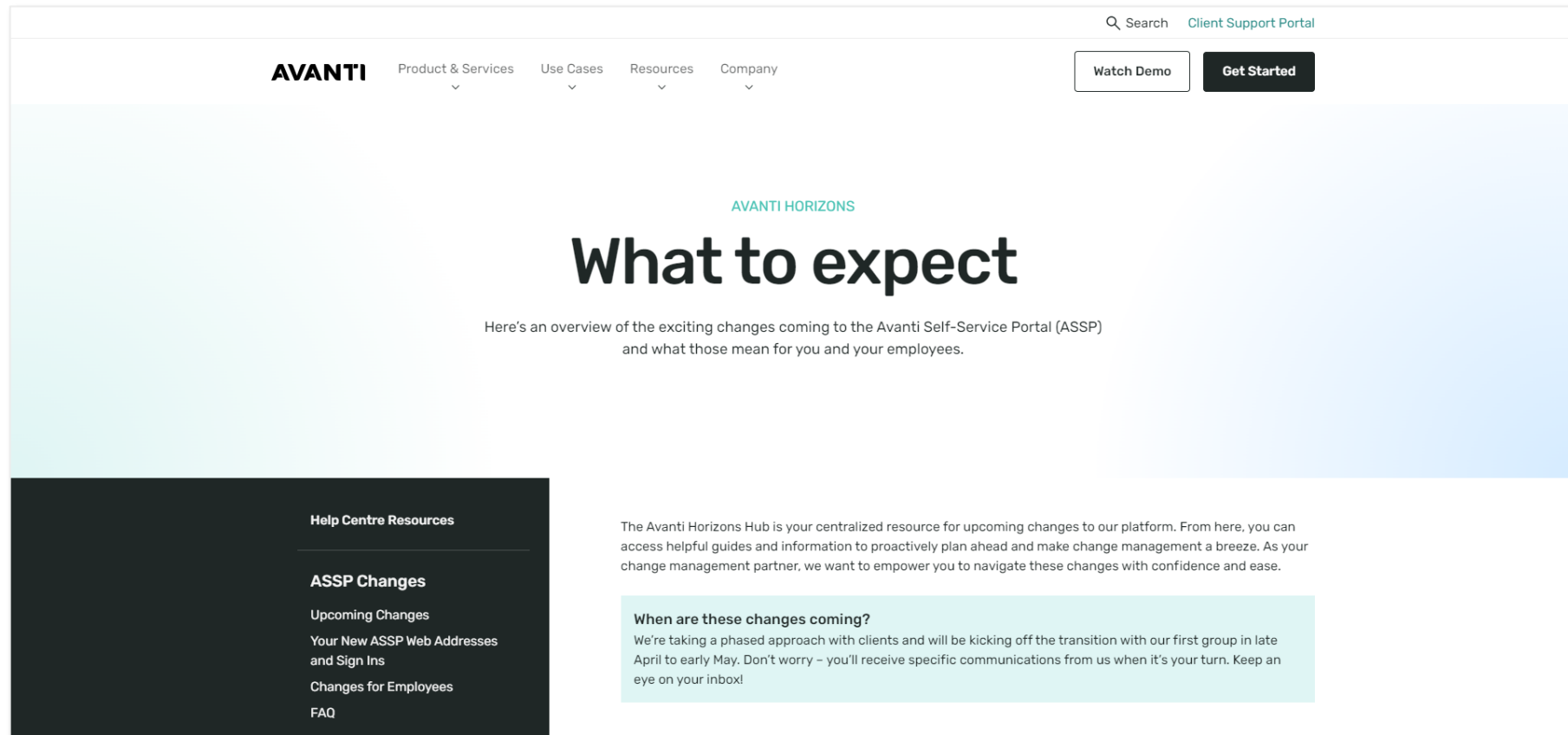
AVANTI

Thank  
you

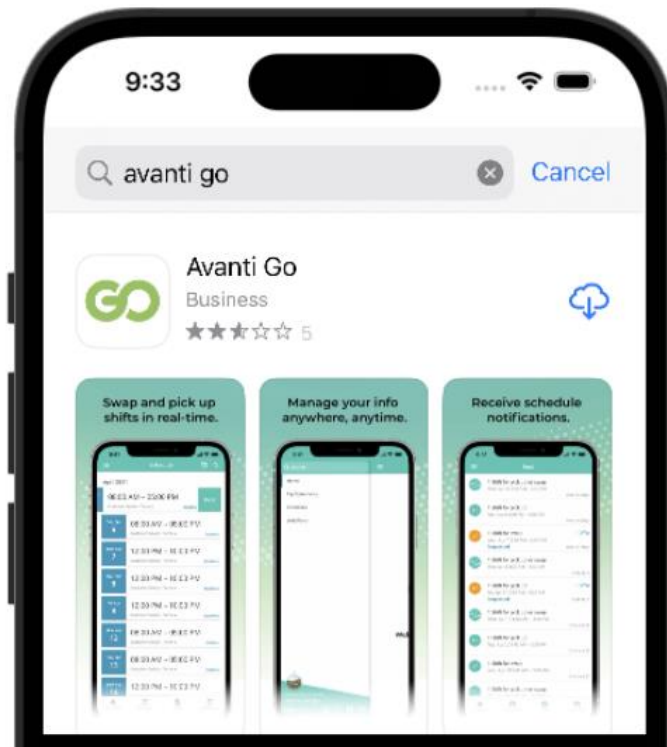
# Avanti Horizons Hub

> Centralized resource for upcoming changes to our Avanti solution

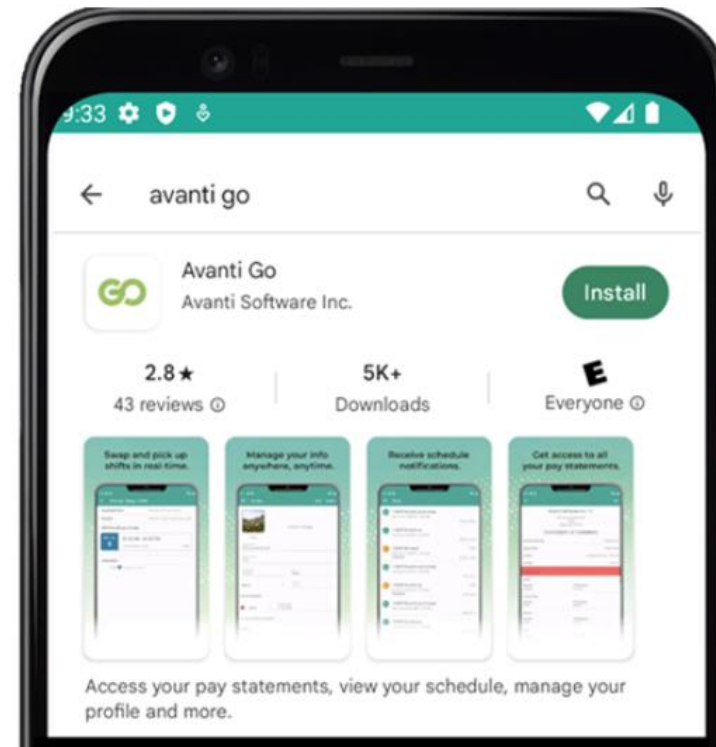
AVANTI



iOS



Android







Let's get started!

# User Groups & Role Assignments

› Recap of Essential for Managers Web Portal Features I



## Avanti User Groups

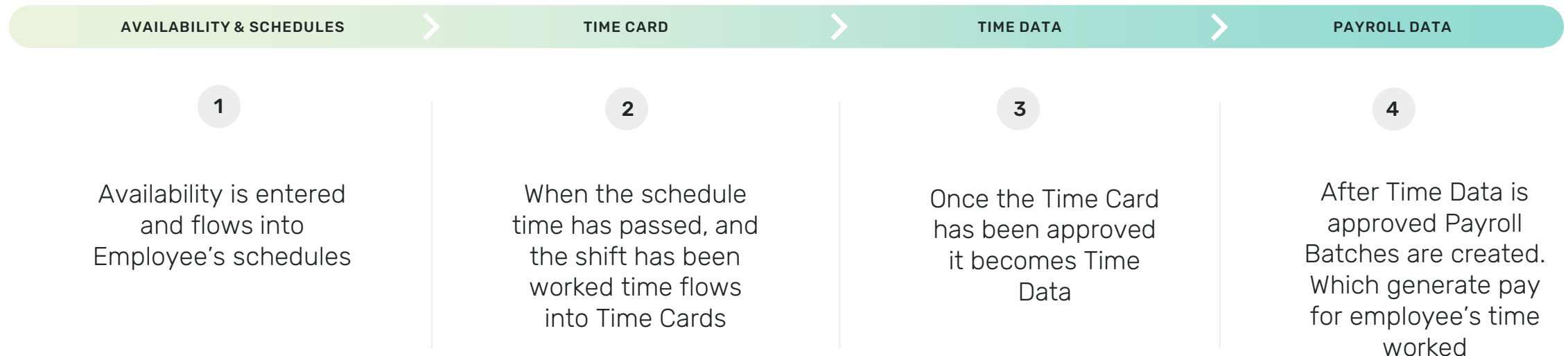
- ✓ Defines user access to either Desktop, Web Portal or both
- ✓ Allows only certain User Groups to access specific Menu Items in the system

## 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

## 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

AVANTI

Time Entry Approval

Schedule Approval

Time Entry Approval

Availability Approval

Schedule Approval

Time Card Approval

Time Data Approval

Administration

Employee Training

Management

Job Postings

Time Entry Approval > 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	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 General Manager	90.00		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	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	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 Shop Manager - Plant A	90.00		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	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

Care\_Webinar - Employee Profile

File Edit View Options Help

Employee 000001001 Smith, Angel

Navigation icons: Back, Forward, Home, Search, Print, Options

**Personal**

- Dates
- Values
- Employment Data**
- Payment Method
- Tax Factors
- Documents
- Positions
- Variable Values
- Time Entry Documents

**Earnings**

- Earning Codes
- YTD/LTD Earning Values
- Previous Year Data
- YTD/LTD Position Units
- Future Dated Rates
- EI Earnings and Hours
- ROE Data Maintenance

**Deduction/Benefits**

- Deduction/Benefit Codes
- YTD/LTD Deduction/Benefit Value
- Leave Entitlements

**Totals**

**Documents and Reviews**

- Employee Documents
- Company Documents

**Payment Inquiry**

**View Tax Slip Images**

**Benefits Administration**

- Benefits
- Dependents

**Human Resources**

- Appraisal History
- Awards
- Current Employment History
- Discipline History
- Emergency Contacts
- Employment Equity
- Grievance History

**Employment Data**

Pay Group	001 Bi-Weekly	Employment Status	01 Working
Location Code	2000 South Calgary	Job Status	FT Full Time
Vacation Group	01 Vac - AB1	FTE	1.0000
Vacation Option	Accrued	Mid-Period Advance	0.00
Vacation Earn Code	000	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Salaried <input checked="" type="radio"/> Hourly
Vacation Percentage	6.00%	<input type="checkbox"/> Overtime Exempt	<input type="checkbox"/> Update Employment History
Worker's Comp	001 WCB - Alberta	<input type="checkbox"/> Update Benefits	<input type="checkbox"/> Re-apply employment defaults
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		
Position rate	A0050.		
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:

Time Card Entry

Time Card - Single Day View | Time Card - Date Range View | Time Card - Pay Period View | Time Card - Calendar View

000001001 - Angel Smith | 08-Apr-2024 | Time Card Template

+ Add | Delete | Edit | Entitlements | Approve | Unapprove | Cancel | Undo Cancel | Save Changes | Refresh

<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	
<b>Totals</b> 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

AVANTI

Employee Directory

Available Leave

Personal Info

Availability

Employee Schedule

**Time Card Entry**

Time Data

Time Card Entry

Time Card - Single Day View

Time Card - Date Range View

Time Card - Pay Period View

Time Card - Calendar View

000001001 - Angel Smith

08-Apr-2024

Time Card Template

+ Add

Delete

Edit

Entitlements

Approve

Unapprove

Cancel

Undo Cancel

Save Changes

Refresh

	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

AVANTI

Employee Directory

Available Leave

Personal Info

Availability

Employee Schedule

**Time Card Entry**

Time Data

Time Off

Time Entry Approval

Administration

Employee Training

Management

Job Postings

Applicant Management

Time Card Entry

Time Card - Single Day View

**Time Card - Date Range View**

Time Card - Pay Period View

Time Card - Calendar View

000001001 - Angel Smith

01-Apr-2024 - 30-Apr-2024

Time Card Template

+ Add

Delete

Edit

Entitlements

Approve

Unapprove

Cancel

Undo Cancel

Save Changes

Refresh

	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	
<b>Totals</b> 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 selected and displayed

AVANTI

Employee Directory

Available Leave

Personal Info

Availability

Employee Schedule

Time Card Entry

Time Data

Time Off

Time Entry Approval

Administration

Employee Training

Management

Job Postings

Applicant Management

Time Card Entry

Time Card - Single Day View

Time Card - Date Range View

Time Card - Pay Period View

Time Card - Calendar View

000001001 - Angel Smith

30-Mar-2024 - 12-Apr-2024

Time Card Template

+ Add

Delete

Edit

Entitlements

Approve

Unapprove

Cancel

Undo Cancel

Save Changes

Refresh

<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	
<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 - Vacation	12:00 AM	12:00 AM		1.00	Days	Unapproved	
<div>Totals</div> <div>Hours: 35.00 Days: 1.00</div>									

# How to Navigate Time Entry Templates

> Breakdown of calendar view

## Calendar

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

AVANTI

Employee Directory

Available Leave

Personal Info

Availability

Employee Schedule

**Time Card Entry**

Time Data

Time Off

Time Entry Approval

Administration

Employee Training

Management

Job Postings

Applicant Management

System Configuration

Time Card Entry

Time Card - Single Day View

Time Card - Date Range View

Time Card - Pay Period View

**Time Card - Calendar View**

000001001 - Angel Smith

Time Card Template

Refresh

Today

April, 2024

Month Week Day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	01 VAC - 1.00 Days	02	03	04 REGULAR - 8.00 Hours FLOATDAY - 1.00 Hours	05 REGULAR - 9.00 Hours	06
07	08 REGULAR - 9.00 Hours	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	01	02	03	04
05	06	07	08	09	10	11

# 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 web portal interface for Time Card Approval. The left sidebar shows the navigation menu with 'Time Card Approval' highlighted. The main content area shows a table of employee time card entries for the week of April 3rd to 10th, 2024.

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 peter 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

<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
<b>Totals</b>		<b>Hours: 9.00</b>		

## Time Entry Approval Template

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

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

AVANTI

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

AVANTI

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

AVANTI

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.

# AVANTI

[avanti.ca/skillup](https://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