



Aspect Software, Inc.
Back-office software for restaurateurs

Labor Reporting

Support Guide for Scheduling Employees

Phone: 800.454.3280 or 405.721.4420

Fax: 405.721.4419

www.aspect-software.net

support@aspect-software.net

Revised April 24, 2007

How To: Labor Reporting

Overview - Labor Reporting

Labor information is normally imported automatically from your POS system at the end of each day or early the next morning. If labor information is not imported automatically, select Import POS Totals from the Action menu to import it manually. If you wish to automate the import, see the topic 'Installation'.

You can use Aspect to review your labor each day, to make timeclock adjustments and to prepare a payroll timesheet at the end of the pay period. This timesheet can be exported to many popular accounting packages and payroll services.

All of the labor reports are available from the Labor Reporting tab in the Navigator and from the Payroll menu. Before you get started though, you will need to verify that the overtime rules for your state are set correctly in Aspect.

Payroll Settings

In order for Aspect to calculate overtime correctly, you will need to enter the frequency of your payroll and the overtime rules that should be used. To do this, close the Navigator, select Payroll Setup from the Settings Menu, and then Payroll Settings.

Click the Overtime button at the bottom and enter the beginning day of your payroll week, the date of the first day of the current payroll period and your payroll frequency.

Next, turn on the checkboxes next to each overtime rule that should be applied.

The checkbox labeled 'Use average regular rate...' determines whether the overtime rate is 1-1/2 times the current job being worked or 1-1/2 times the employee's average rate. For example, if an employee works 20 hours as a hostess and 20 hours as a server, they will have 40 regular hours. If they then come into work the 41st hour as a server, this checkbox determines whether they are paid 1-1/2 times their server rate or 1-1/2 times their average hourly rate during the first forty hours.

The checkbox labeled 'Use tip credit...' is only used if you pay servers less than minimum wage. If you do not pay any employee less than minimum wage, leave it turned off. If you do, turn it on.

The checkbox labeled 'Overtime for hours over 40...' works as follows: Suppose an employee works several 10 hour shifts and you are paying them overtime for hours over eight in a single day. They will have some combination of regular and overtime hours even if they have not worked 40 hours yet. When the employee does reach 40 hours, they will be paid overtime for each additional hour. However, some states do not include the earlier overtime as part of the 40 hours.

This is as complicated as it gets. The rest is easy. Check with your payroll company if you are unsure of these settings. Press Ok to save your changes and click on the lightning bolt to open the Navigator back up.

Employee Records

When you select Employee Records from the Labor Reporting tab of the Navigator, you see a list of all the employees that have been imported from your POS system. You can add employees manually in Aspect but it is not recommended. Instead, add new employees to your POS system and they will be imported into Aspect. There is not much that you will do in the Employee Records window, but there are a few things you should know.

Double-click on any employee and note that there is a place for a date-of-termination near the bottom right. If a date is entered here, the employee will not appear on the employee schedule in Aspect.

You can enter addresses, phone numbers and other information that may not be imported from your POS system. Additional information can be entered by pressing the 'More' button. Do not change the job codes or pay rates because this information is updated every night from the POS system. If you want to change a rate, do it on the POS system.

Normally, you will not delete employees. You will enter a date of termination instead. However, if you wish to delete an employee, highlight the employee and press the red '-' at the top. You will have three options. The first option is used to simply hide the employee. If you delete an employee using this option, you can always un-delete them by double-clicking their record and selecting Ok. If an employee is deleted in this manner, their timeclock information will not be imported from the POS system.

The second option is used to completely purge an employee from Aspect. If you do this, make sure to remove them from the POS system as well or they will be imported again. You can not retrieve any information about an employee in Aspect once they have been purged.

The third option is used to merge two employee records together. This is useful if you have mistakenly entered an employee on the POS system twice with a slightly different spelling of the names. If you choose this option, make sure that the duplicate record has been removed from the POS system, otherwise it will be imported again.

Daily Labor

The Daily Labor window displays one line for each day that has been imported from the POS system. Double-click a day to view the employees that worked that day, their job code, time in/out, hours and pay.

If you find that you are missing a day of labor, click the green '+' at the top and enter the date that you wish to import. If the information is available from your POS system, it will be imported. If the day already exists, you will need to delete it by pressing the red '-' before you can import it again.

You can edit the time in/out, rate and tips for an employee by double-clicking on their record. Press the Sales button to edit tips. When you edit a shift, you will see three time in/out entries. The bottom one is the information that came from the POS system. The middle one is the employee's scheduled time in/out (if you entered a schedule in Aspect). The Approved time in/out is the same as the POS timeclock unless you change it.

Once a day has been imported into Aspect, it will not be imported again. This means that if you make timeclock adjustments to a past day on the POS system, Aspect will be unaware of these changes

unless you delete the day and reimport it.

The procedure that most people follow is to make any timeclock adjustments for the current day on the POS system before it is imported into Aspect. Once the day has been imported into Aspect, adjustments to that day should be made in Aspect.

If instead, you choose to make all of your adjustments on the POS system, you will need to delete and reimport each day in Aspect so that it reflects the current POS information.

Labor Detail Report

The Labor Detail Report is where you go to view a payroll timesheet for the entire payroll period.

The most commonly used displays in this report are 'Detail By Employee' and 'Payroll Timesheet'. Click on the binoculars to select either of these displays. Make sure to familiarize yourself with the other displays as well.

When viewing the 'Detail By Employee' display, you may edit time and rates by double-clicking on a shift (not one of the blue subtotals).

The 'Payroll Timesheet' display is similar to the 'Detail By Employee' display, except it only displays totals for each employee rather than each individual shift.

By default, tips are not included on either of these displays. To add tips to the report, click on the binoculars and then on the Custom button. On the bottom right, you see a list of 'Fields Selected'. These are all of the columns currently displayed in the report. On the left, you see a list of 'Available Fields'. These are all of the columns that can be displayed. To add Total Tips, scroll to the bottom of the 'Fields Selected' and highlight the blank line beneath Total Pay. This will cause the new field to go on the far right of the report. Next, locate Total Tips in the list of 'Available Fields' and double-click on it or press Add. You should see Total Tips on the right-hand side now. Press the Save button at the top to make this a permanent change and Ok at the bottom to view the change.

Using the binoculars, you can also filter the report to display information for a single employee. To do this, click on the binoculars and Custom, then select the desired employee from the drop-down list next to the word 'Employee'.

When you have reviewed the payroll timesheet, you may print it and fax it to your payroll company or you can right-click and select one of the export options. Look at the topic named 'How to: Exporting Payroll' for information on exporting labor information to a payroll service or accounting package.

Labor Summary Report

The Labor Summary Report is used primarily to view labor percentages by day. You will not find information about individual employees in this report, only totals for each day. This report is most useful once you have started entering schedules. Use the binoculars to create reports containing total hours, pay, actual vs. scheduled pay, etc. for each schedule.

Exporting Labor to a Payroll Service or Accounting Package

For information on exporting labor information to a payroll service or accounting package, check the topic named 'How To: Exporting Payroll'.

FAQ: Labor Reporting

How do I import missing labor?

Sales and labor are normally imported for the previous day by selecting Import POS Totals from the Action menu.

To import labor for a prior day, select Edit Daily Labor from the Payroll menu. Press the green '+' on the toolbar, enter the day you wish to import and press Ok. If the information is available on your POS system, it will be imported. If the program complains that the day already exists, you will need to delete it first and then insert it by pressing the green '+'.

How do I import missing labor from my HSI system if the HSI timeclock has been reset?

You will need to create some folders and copy some files. If you do not know how to do this, check with your system administrator or click on the Windows Start button and select Help to learn how.

Create folders named 'Data2' and 'Jor2' under your main Aspect folder. Copy the file named 'employee.dat' from touchit\data2 into the data2 folder beneath Aspect. Determine the days that need to be imported and copy the appropriate journal files from touchit\jor2 to the jor2 folder beneath Aspect.

In the touchit\jor2 folder, you will find the posted timeclock file. It will begin with the letters 'tc_'. Copy the appropriate timeclock file to the data2 folder under Aspect and rename it to timeclck.dat.

Select Store Settings from the Settings menu and double-click on your store. Change the POS directory to 'g:\aspect'. Select Edit Daily Labor from the Payroll menu and press the green '+' to import the missing days.

When you have finished, change the POS directory back to g:\touchit and delete the temporary folders you created under the Aspect folder. Make sure that you delete the folders under Aspect, NOT under touchit.

How do I import missing labor from my OnePOS system if the OnePOS timeclock has been reset?

You will need to create some folders and copy some files. If you do not know how to do this, check with your system administrator or click on the Windows Start button and select Help to learn how.

Create folders named 'Data2' and 'Jor2' under your main Aspect folder. Copy the file named 'emp28.dat' from touchit\data2 into the data2 folder beneath Aspect. Determine the days that need to be imported and copy the appropriate journal files from touchit\jor2 to the jor2 folder beneath Aspect. Files start with jrn.

In the touchit\jor2 folder, you will find the posted timeclock file. It will begin with the letters 'ta_'. Copy the appropriate timeclock file to the data2 folder under Aspect and rename it to tmclk28.dat.

Select Store Settings from the Settings menu and double-click on your store. Change the POS directory to 'g:\aspect'. Select Edit Daily Labor from the Payroll menu and press the green '+' to import the missing days.

When you have finished, change the POS directory back to g:\touchit and delete the temporary folders you created under the Aspect folder. Make sure that you delete the folders under Aspect, NOT under touchit.

Why do I get an notice or error about Duplicate Employees?

There are two reasons why you might get the message when importing from the POS System.

First, there are two entries for an employee in the POS System. Since Aspect imports by name for most POS Systems, there needs to be a unique first name and last name for each employee, such as John Doe. If you have the same employee twice in the POS System, you can simply find the duplicate employee in the POS System and either change the name by adding a middle initial after the first name or simply deleting the employee all together. Before doing either, please check with your system administrator.

Sometimes you have two (2) employees with the same name. In this case, you would need to place a middle initial after the first name in order to distinguish the two. For instance, John A Doe and John B Doe.

Second, if you still have the problem and are using HIS, each employee has two entries for their first/last name on HSI. In the case of the employee, the first set of fields contains First Name, Last Name and the second set contains First Name, Last Name. The second set of fields was added to increase the length of the name fields and should be a direct correlation to that of the first set, but unfortunately the structure in the file has become corrupt. Traditionally, Aspect uses the first set if it contains a valid name. Otherwise it uses the second set.

If you have the corruption, Aspect will allow you to always use the second set. The version with this work-around is 5.83. Edit the POS Definitions and set the index for first and last name to 30 and 31 respectively. The other option is to delete the original employee on HSI and add a new one when you need to change the name.

Is there a way to automatically import timeclock adjustments made on the point-of-sale system into Aspect?

Normally, labor is imported into Aspect and adjustments to employee clock in/out times are made in Aspect. Usually people find that it is easier to perform this function in Aspect.

If you would rather make the adjustments on your point-of-sale system, you can tell Aspect to re-import past days of labor during the normal daily import. To do this, select Payroll Setup from the Settings Menu and then select Payroll Settings. Turn on the checkbox labeled 'Import timeclock adjustments for the last x days' and set the number of days that should be imported. For example, if you always want to import the last 7 days of labor, turn on the checkbox and set the number of days to 7.

From then on, when you select Import POS Totals from the Action menu or when you manually import a day of labor in Edit Daily Labor, Aspect will import the selected day and also re-import the number of

days specified.

If I've just installed Aspect, is there a way to import all past labor information from my POS system?

No. Labor must be imported manually as described above.

The employee records in Aspect have become corrupted - names appear where phone numbers should be, etc. How do I fix it?

This means an error of some sort occurred when Aspect imported employees from your POS system. You have three options:

Select Edit Daily Labor from the payroll menu. Double-click on days during the current period and some from several weeks ago. If everything looks okay (no garbage), you can just delete the garbage records from the Edit Employee Records window.

If the daily labor does appear to be corrupted and if you have a recent backup, you can restore employee.def to the store directory from the backup. Then, delete and reimport any days that look incorrect in Edit Daily Labor.

As a last resort, you may choose to delete all past labor information in Aspect and start over. To do this, delete employee.def and *.lbr from the store directory. Select Import POS Totals from the Action menu to import from your POS system. Select Edit Daily Labor from the Payroll menu and press the green '+' to insert each day in the current payroll period.

An employee is missing from my daily labor reports. How do I get them to import?

An employee cannot be listed on the POS system twice with the same first and last name. If you are missing an employee from your daily labor, this is almost certainly the case. Look at your employees on the POS system and make sure that you are including any terminated and deleted employees. You should find two records for the missing employee. You will need to modify the first or last name of one of them somehow. You can add an initial or anything else that you like as long as the first and last names are not identical.

Another thing to check is to make sure that the employee has not been deleted or terminated in Aspect. To do this, select Edit Employee Records from the Payroll menu. Click on the binoculars on the toolbar and then on the Custom button at the bottom. Turn on the checkboxes labeled 'Terminated Employees' and 'Deleted Employees'. This will cause all employees to be displayed in the list. If you locate the employee in the list and find that their record is displayed in light gray it means that they have been deleted. To un-delete them, double-click on their record and then press Ok. Also, double-click on the record and make sure that there is no date of termination entered for the employee. If there is, remove it.

If the employee record exists in Aspect, you might also double-click on the record and then press More.

Make sure that the checkbox labeled 'Do not import hours for this employee' is not turned on.

How do I view a payroll timesheet? How do I view a payroll timesheet for one employee?

Select Labor Detail Report from the Payroll menu and enter the appropriate dates. When the report opens, click on the binoculars and select 'Detail By Employee' or 'Payroll Timesheet'.

If you want to view information for a single employee, click on the binoculars and then on the Custom button. In the middle, select the employee in the drop-down list to the right of the word 'Employee' and press Ok.

I've opened a Labor Detail Report but there's nothing in it. How do I view my labor?

Click on the binoculars and select either the 'Detail By Employee' or 'Payroll Timesheet' display. If you still see nothing, click on the binoculars and Custom. Make sure that no filters have been entered in the middle section, like a particular job code or employee.

If this does not solve the problem, select Edit Daily Labor from the Payroll menu. If you do not see a line for each day in this window, press the green '+' to import the missing days.

If you do see days in the Daily Labor window, then the problem is with the display options you have selected in the Labor Detail report. Return to the report, click on the binoculars and Custom, and check your display settings again.

How can I verify that employees are claiming enough in tips?

Select Payroll Setup from the Settings menu and then Payroll Settings. At the bottom, enter a percentage in the field labeled 'Targeted tip percentage'. For example, enter 15. Do not enter a decimal point.

Open a Labor Detail report and add columns for 'Net Sales' (not 'Total Net Sales') and 'Target Tip Amount'. If you've not already added a column for 'Total Tips' add this to. Any employees with tips less than the percentage you specified will be highlighted in red.

Aspect will not change an employee's tips for you automatically. If an employee's tips are too low on a particular day, double-click the shift and click on the Sales button to edit them. (You need to select the 'Detail By Employee' display in order to edit shifts).

Why do some employees show a negative amount for their cash tips?

By default, employees are expected to declare their total tips on the POS system at the end of the day. Aspect imports the employee's charge tips from the POS system and deducts this from the total tips to calculate their cash tips. If an employee claims total tips that are less than their charge tips, their cash tips will be negative.

There are two ways to address this. The first is simply to require that employees declare their tips properly.

The second way is to cause Aspect to import the employee's declared tips as cash tips rather than total tips. In this case, Aspect would add their charge tips to their declared (cash) tips to calculate total tips. To do this, select POS Definitions from the Settings menu. Double-click on your POS System and press Setup. Double-click on Employee Time Clock. Scroll down the list at the bottom and locate Shift Total Tips. Double-click on this line. Note the number entered here and replace it with a zero. Locate and double-click on Shift Cash Tips and enter the number that was next to Shift Total Tips. Press Ok until you have closed the open windows. Now, Aspect will expect employees to declare their cash tips, not total tips.

Why do some employees continually show up twice in Aspect even though they are only in HSI once?

Each employee has two entries for their first/last name on HSI. In the case of the employee, the first set of fields contains First Name, Last Name and the second set contains First Name, Last Name. The second set of fields was added to increase the length of the name fields and should be a direct correlation to that of the first set, but unfortunately the structure in the file has become corrupt. Traditionally, Aspect uses the first set if it contains a valid name. Otherwise it uses the second set.

If you have the corruption, Aspect will allow you to always use the second set. The version with this work-around is 5.83. Edit the POS Definitions and set the index for first and last name to 30 and 31 respectively. The other option is to delete the original employee on HSI and add a new one when you need to change the name.

How do I export my payroll to an accounting package (or payroll service)?

Refer to the topic named 'How to: Exporting payroll'.

Can Aspect export payroll to...?

Refer to the topic named 'How to: Exporting payroll' for a list of the payroll services and accounting packages that Aspect currently exports to.

If you want to export to a service or package not in this list, first find out if that service or package can accept an import file. If so, then ask for a sample file and some documentation describing the file. When you have this, email the sample file and documentation to Aspect@aspect-software.net.

How do I enter in salaried employees wages and how can I have salaries impact my labor percentage?

Select Edit Employee Records from the Payroll menu. Double click on the employee to edit the employee record. Once the Edit Employee Record box is open, click on the "more" box.

On the top right of the Edit Employee Record box, there is a section called Rate Information. Here, you change the pay type to "salary" and enter in the employees weekly salary. For instance, if the manager makes \$35,000 and there are 52 weeks in the fiscal calendar, then you would divide the salary by the number of weeks to obtain the weekly salary ($\$35,000/52 = \673.07). Once done, choose OK and the salaried employee will now calculate as a function of labor percentage.

How far back can Aspect read the timeclock file?

Aspect, by default, will only read the last 60 days. However, if you need to reimport timeclock information for a greater amount of time, you can always change your POS date/time back and then reimport. However, before doing this, please contact your POS provider as well as Aspect as it might interfere with current date of business information.

