

## Correct Labor Polling Exceptions

Compeat Labor uses *Job* and *Employee POS Codes* to connect labor punches in your Point of Sale system (POS) to employee and job records in Compeat.

When punches from the POS do not match an employee or job record in Compeat, they are flagged as a **Polling Exception** and made visible on the *Labor Polling Exception Report*. **Note:** Any exceptions listed on the report are not included in labor reporting and payroll exports. Exceptions must be corrected to be considered.

### Run the *Labor Polling Exception Report*

To access the *Labor Polling Exception Report*, go to **Labor > Reports – Time & Attendance > Labor Polling Exception Report**.



The screenshot shows the Compeat workforce interface for the 'labor polling exception report'. The 'Report Options' section includes:

- Start Date: 3/1/2017 (Callout 1)
- End Date: 4/10/2017 (Callout 2)
- Show exempt salaried employees (Callout 2)
- Run Report button (Callout 3)

1. Enter a **Start** and **End Date**. Only exceptions generated in this time frame will show on the report.
2. Check **Show Exempt Salaried Employees** if you wish to include salaried employees in the report. Non-exempt salaried employees show by default.
3. Click **Run Report**.

Returned results are specific to the entity you are logged in to, and detail all labor punches flagged as exceptions. If you note the **Exception** column, each punch has an *Exception Type*. The type helps determine which action must be taken to correct the exception.

Labor Polling Exceptions							
<b>Entity:</b>	Austin			<b>Report Run:</b>	4/10/2017 4:21 PM		
<b>Range:</b>	3/1/2017 - 4/10/2017			<b>Page:</b>	1 of 7		
Polling Date	Exception	Employee	Time In	Time Out	POS Code	Job Code	Punch Type
3/1/2017	Unmatched Employee	Doe, Jane C	3/1/2017 10:00 AM	3/1/2017 4:20 PM	222	104	Work
3/1/2017	Unmatched Employee	Queue, Suze	3/1/2017 9:50 AM	3/1/2017 4:42 PM	4009	110	Work
3/1/2017	Unmatched Employee	Kelly, Lianne	3/1/2017 1:33 PM	3/2/2017 4:00 AM	3271	111	Work
3/1/2017	Unmatched Employee	Green, Shannon	3/1/2017 11:56 AM	3/2/2017 4:00 AM	281	111	Work
3/1/2017	Unmatched Employee	Jones, Jennifer	3/1/2017 4:18 PM	3/1/2017 11:29 PM	444	104	Work
3/1/2017	Employee Not Assigned to Job	Ellis, Todd	3/1/2017 6:15 AM	3/1/2017 12:04 PM	5962	203	Work
3/1/2017	Employee Not Assigned to Job	Kelley, Bryan	3/1/2017 4:30 PM	3/1/2017 11:48 PM	7989	203	Work
3/2/2017	Unmatched Job	Davis, Aimee	3/2/2017 11:43 AM	3/2/2017 4:02 PM	222	104	Work
3/2/2017	Unmatched Job	Santos, Anna	3/2/2017 8:54 AM	3/3/2017 4:00 AM	4009	110	Work

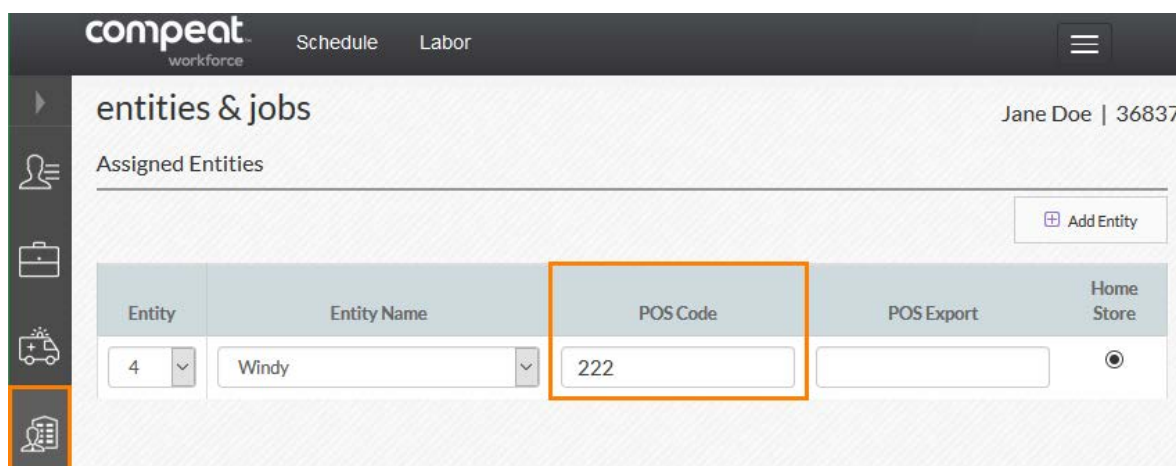
## Correct Polling Exceptions

Since polling exceptions are typically mapping issues, these errors are easily addressed within Labor. Below are common polling exceptions, their causes, and instructions for correcting them.

### Unmatched Employee

**Cause:** Employee POS Code listed on the employee record does not match the POS Code listed on the *Labor Polling Exception Report*. The code is missing, incorrect, or the employee record has yet to be created.

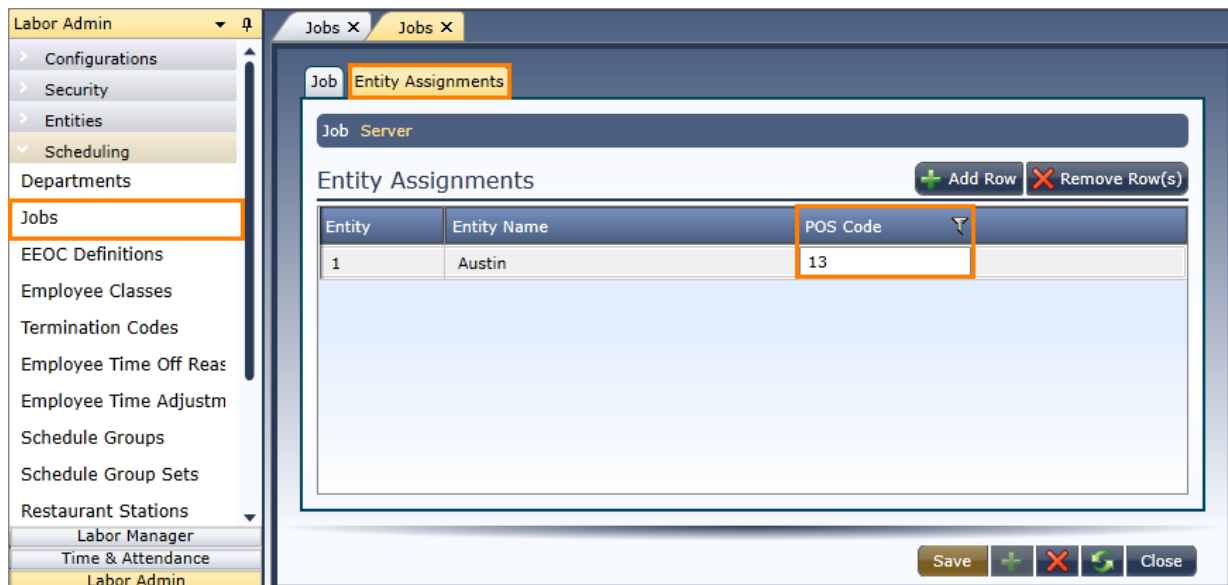
**Correction:** Go to *Labor > Employees* and locate the employee record. On the *Entities & Jobs* tab, ensure the POS Code listed matches the POS Code on the *Labor Polling Exception Report* (*POS Code* column). Make corrections, add the code, or create the employee record, if necessary.



## Unmatched Job

**Cause:** Job POS Code listed on the job record does not match the POS Code listed on the *Labor Polling Exception Report*. The code is missing, incorrect, or the job record has yet to be created.

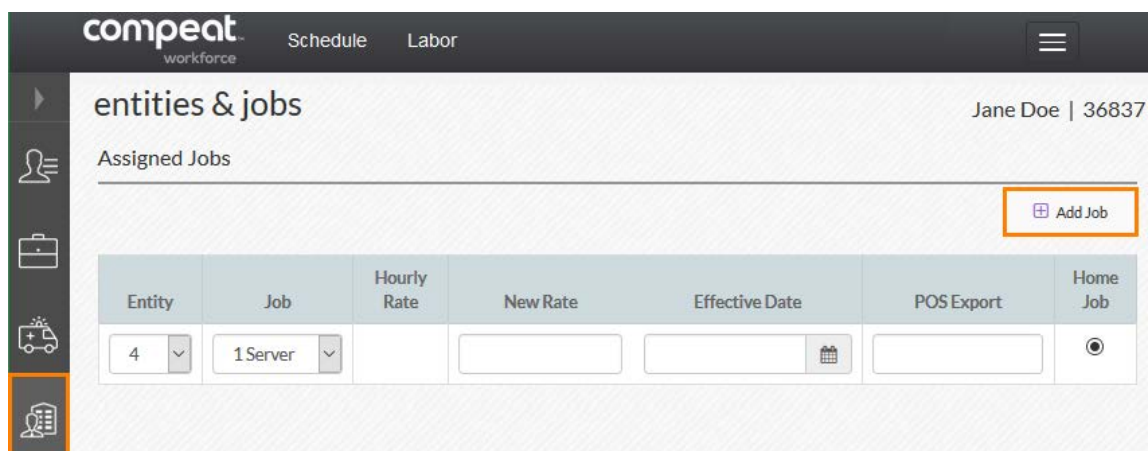
**Correction:** In Workforce 1.0, go to *Labor Admin > Scheduling > Jobs* and locate the job record. On the *Entity Assignment* tab, ensure the POS Code listed matches the POS Code on the *Labor Polling Exception Report* (*Job Code* column). Make corrections, add the code, or create the job record, if necessary.



## Employee Not Assigned to Job

**Cause:** Compeat polled a labor punch for a job not assigned on the employee record.

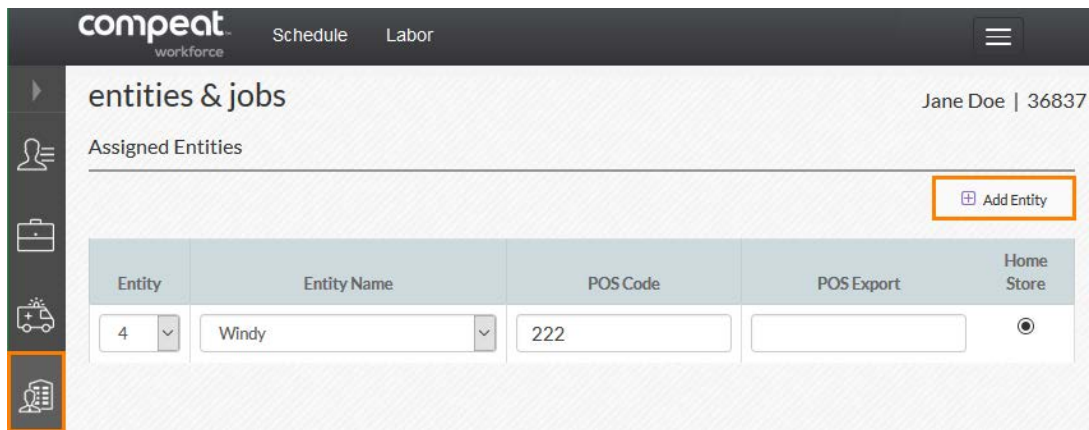
**Correction:** Go to *Labor > Employees* and locate the employee record. On the *Entities & Jobs* tab, click *Add Job* to assign the job to the employee.



## Employee Not Assigned to Store

**Cause:** Compeat polled a labor punch for an entity not assigned on the employee record.

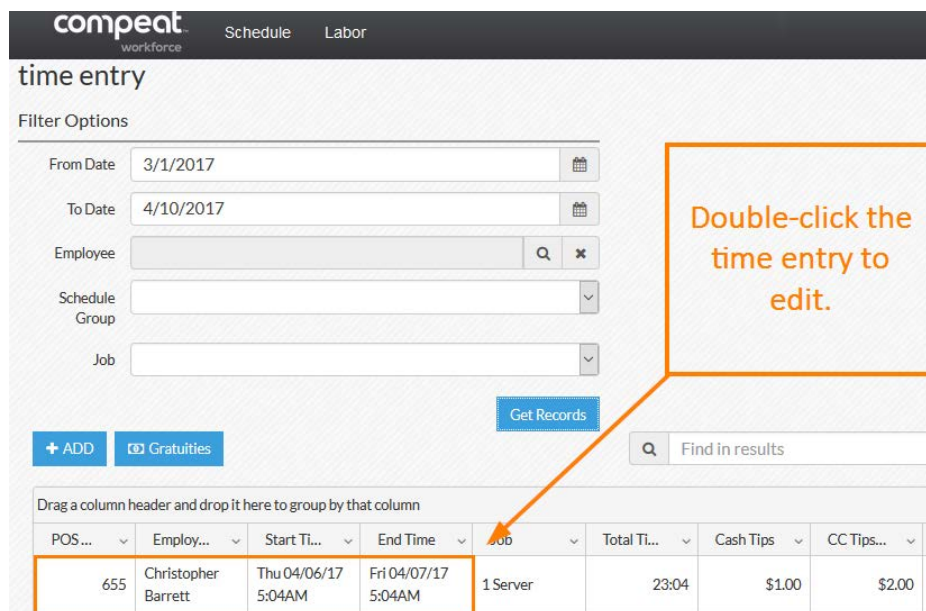
**Correction:** Go to *Labor > Employees* and locate the employee record. On the *Entities & Jobs* tab, click *Add Entity* to assign the entity to the employee. Make sure to enter the Employee POS Code.



## Punch Overlapping Existing Modified Punch

**Cause:** A discrepancy exists between a polled labor punch and an existing punch in Compeat. Either a user edited the existing punch in Compeat, or the punch was edited on the POS server. Once edits are made to a labor punch in Compeat, the punch locks against polling changes. Detected discrepancies flag the punch as an exception.

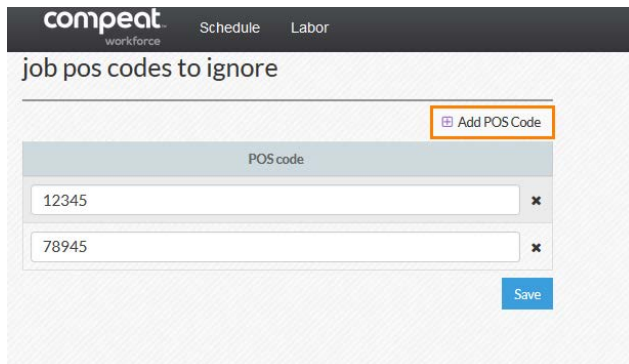
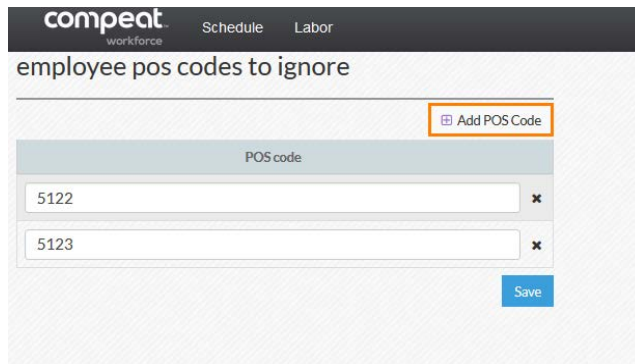
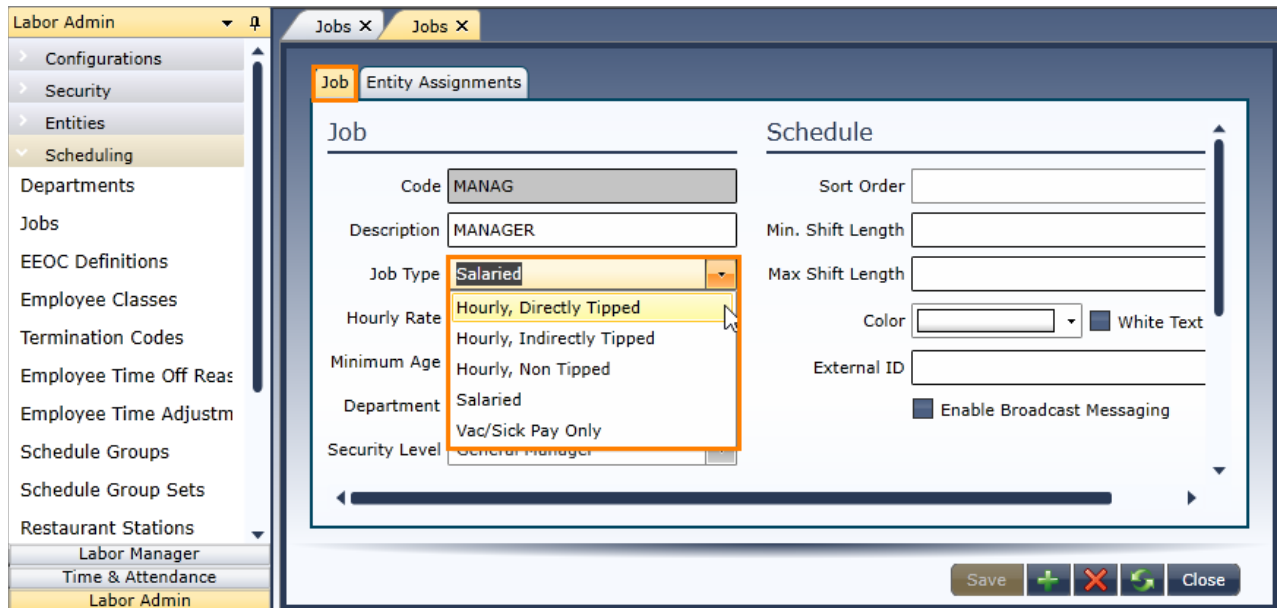
**Correction:** Go to *Labor > Time Worked > Time Entry* and locate time entry. Use the date and time in/out information on the *Labor Polling Exception Report* to guide your search. Review the punch and determine what, if any, changes must be made.



## Salaried Job

**Cause:** Compeat polled a labor punch for a job marked as *Salaried* in Compeat.

**Correction:** You have two options: 1) In Workforce 1.0, go to *Labor Admin > Scheduling > Job*, locate the job record, and set the *Job Type* to hourly, or 2) In Labor, go to *Labor > Time Worked > Employee/Job POS Codes to Ignore* and add the job or employee POS code to the listing. On the *Labor Polling Exception Report*, the *POS Code* is the Employee POS Code and the *Job Code* is the Job POS Code.



## Inactive Employee

**Cause:** Compeat polled a labor punch for an employee set as *Inactive* (terminated) in Labor.

**Correction:** Go to *Labor > Employees* and locate the employee record. On the *Employment Info* tab, review the employee's *Status*. Either make the employee active, or remove the POS Code assigned on the *Entities & Jobs* tab.

The screenshot shows the 'employment info' page for Jane Doe | 36837. The 'Status' dropdown menu is highlighted in orange and set to 'Inactive'. Other fields include Staff Type (Schedule Only), Class (Full-time), Type (Hourly), Hire Date (1/1/2012), Next Review (1/1/2013), Last Raise (10/23/2012), and Termination.

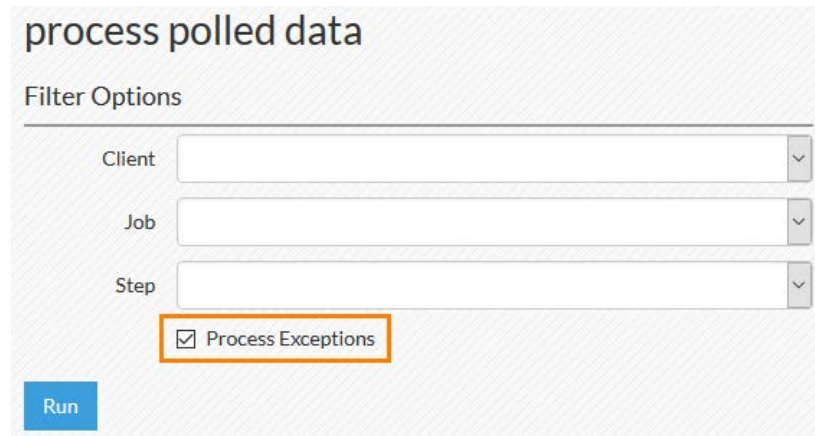
The screenshot shows the 'entities & jobs' page for Jane Doe | 36837. The 'Assigned Entities' table has one row with the following data:

Entity	Entity Name	POS Code	POS Export	Home Store
4	Windy	222		<input checked="" type="radio"/>

The 'POS Code' field '222' is highlighted in orange. There is an 'Add Entity' button in the top right corner.

## Process Corrected Exceptions

Once exceptions are corrected, they must be processed to clear them from the *Labor Polling Exception Report*. This does not re-poll the labor data, but rather compares the already polled data against recent changes in Labor and looks for matches.



1. Go to **Labor > Time Worked > Process Polled Data**.
2. Ensure **Process Exceptions** is checked.
3. Click **Run**.

**Note:** To process exceptions for a single entity, choose the **Client** (the entity's polling client), the **Job** (the entity), and the **Step** (Labor Punches). This speeds up processing as Labor only processes the specified entity's exceptions.

## Verify Labor Punches Have Processed

Once processing completes, re-run the *Labor Polling Exception Report* and the corrected items should no longer show.

**Note:** We strongly encourage you run this report daily to ensure these errors are resolved. Not addressing exceptions could result in inaccurate or incomplete data being exported to your payroll provider.

Labor Polling Exceptions							
<b>Entity:</b> Austin							
<b>Range:</b> 3/1/2017 - 4/10/2017							
Polling Date	Exception	Employee	Time In	Time Out	POS Code	Job Code	Punch Type