

Marlin GTX

Quick Reference - Time & Attendance

Schedules

Associate with staff to track attendance

Select **Main > Staff > Manage Schedules**

Click **Add**
Enter **Details**

Click on the **tabs** at the top to:

- Add **Breaks**
- Add **Explicit Availability**
- Associate with **Staff**

Click **Save**

Breaks

Add to schedules to indicate staff unavailability

Select **Main > Staff > Manage Breaks**

Click **Add**
Enter **Details**

Click on the **Schedules** tab to add to schedules

Click **Save**

Explicit Availability

Add to staff, schedules and resources to indicate irregular unavailability

Select **Main > Staff > Manage Explicit Availability**

Click **Add**
Enter **Details**

Click on the **tabs** at the top to:

- Associate with **Resources**
- Associate with **Staff**
- Add to **Schedules**

Click **Save**

Note: Explicit Availability can also be used to indicate irregular availability

Staff

Add to track attendance

Select **Main > Staff > Manage Staff**

Click **Add**
Enter **Staff Details**

If Salesperson

Click on **Salesperson Details** tab
Enter **Salesperson Details**
Tick **Active as Salesperson Role** checkbox

If Technician

Click on **Technician Details** tab
Enter **Technician Details**
Tick **Active as Technician Role** checkbox

Click on the **tabs** at the top to:

- Associate with **Resources**
- Associate with **Schedules**
- Add **Explicit Availability**

Click **Save**

Resources

Associate with technicians to view availability in Resource Planner

Select **System > System Files > Places > Resources**

Click **Add/Edit**
If adding, enter **Name**

Click on the **tabs** at the top to:

- Associate with **Staff**
- Associate with **Explicit Availability**

Click **Save**

Tip: Resources can be people

Attendance Entry

Record staff attendance, including breaks

Select **Main > Staff > Attendance Entry**

Select **Staff**
Click **Clock On / Clock Off**

If clocked on, can also click **Start Break / End Break**

Records can be viewed in **Attendance Maintenance**

Attendance Maintenance

View and adjust staff attendance

Select **Main > Staff > Attendance Maintenance**

Add/Edit Attendance

Select **Staff**
Double-click on **timeslot**
Select **Type**
Enter **Date** and **Time**
Add **Comment**
Click **Ok**

Tip: Tick **Add as Individual Days** to break-up multi-day entries across scheduled hours

Attendance Activity Reports

View staff attendance summaries and statistics

Select **Main > Staff > Attendance Activity Report**

Select **Staff**
Select **Date Range**
Click **Generate**

Tip: Individual attendance reports can be viewed in the **Summary** tab of the **Attendance Maintenance** module



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Set Up - Time & Attendance

Overview

Prepare existing **Salespeople** and **Technicians** to update to Staff

Add New Staff

- Enable as **Salespeople**
- Enable as **Technicians**
- Associate technicians with **Resources**

Add Schedules

- Add **Breaks**
- Associate with **Staff**

Add Explicit Availability

- Associate with **Staff**
- Associate with **Schedules**

Record Attendance

- Clock-on/off using **Attendance Entry**
- View and edit using **Attendance Maintenance**
- View records using **Attendance Activity Reports**

Staff Preparation

Clean up salespeople and technician records to convert to staff **before updating to GTX 5.7.1 or later**

Select **System**

> **System Files > People > Salespeople / Technicians**

Edit, Modify and Merge

Check details:

- **Email**
- **Full Names**
- **Salespeople Passwords**

If both **salesperson and technician:**

- **Name** and **Code** should be the same

Tip: Modify Codes to a standard convention where possible (e.g. using staff member initials)

Permissions

Select **System > Passwords > Password Groups**

Edit permissions as appropriate

Attendance Entry:

- **0** - No access
- **1** - Clock-on/off/break themselves

Attendance Maintenance:

- **0** - No access
- **1** - Add/edit entries for all staff (intended for managers)

Attendance Activity Report:

- **0** - No access
- **1** - Run reports for staff activity and payroll

Click **Save**

Tip: Click in the Category list and press **Ctrl+F** to quickly search for permissions



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