

WELCOME TO TIMECLOCK PLUS, VERSION 4.2!

Congratulations on your purchase of TimeClock Plus 4.2!

I.I. The User Reference Guide

The entire User Reference Guide is available to you on the TimeClock Plus CD for viewing and/or printing. It is presented in several sections so that you can print only those sections of interest to you at a particular point in time. You can always reprint sections as needed without printing the entire guide or email them to others for viewing/printing.

I.I.I. How the User Reference Guide is Organized

After this brief introduction to the application, we begin with Section I which is titled “For the Upgrade Customer, Including What’s New in 4.2”. This section is primarily for those customers converting from a previous version of the TimeClock Plus application.

For the new TimeClock Plus customer, we next provide detailed instructions on how to perform all the operations available to you with TimeClock Plus – from the initial setup of the system (including adding new employees and job codes), to collecting time, processing time and exporting and reporting. These instructions are found in Sections II – XIV.



At the end of this “Welcome” you will find a listing of available sections. Simply select those sections of interest to you and view or print them from your TimeClock Plus CD.

I.II. System Requirements

The following are system requirements to ensure proper operation of the TimeClock Plus, version 4.2 application:

Minimum:

1. CD-ROM
2. Mouse or other pointing device

Clients

1. 64 Megabytes of RAM
2. Windows 98SE, 2000, XP and above
3. 25 Megabytes of Hard Disk space
4. 800 x 600 High Color

Server

1. 128 Megabytes of RAM
2. Windows 98SE, 2000, XP, and above
3. 1 Gigabyte of Hard Disk space
4. 800 x 600 High Color

Recommended:

Clients

1. 128 Megabytes of RAM
2. Windows 2000 and above
3. 25 Megabytes of Hard Disk space
4. 1024 x 768 High Color

Server

1. 256 Megabytes of RAM
2. Windows 2000 and above
3. 1 Gigabyte of Hard Disk space
4. 1024 x 768 High Color

I.III. Where to get help – DMI Technical Support Team/Support Policy

There are 3 ways to contact the Data Management, Inc. (DMI) Technical Support Team:

Phone: (325) 223-9300

Email: support@timeclockplus.com

Fax: (325) 223-9104

The DMI Technical Support Team is available from **9:00a – 5:00p CST, Monday through Friday** (excluding standard holidays) to assist you with any questions regarding the installation or operation of your TimeClock Plus application.



DMI reserves the right to modify their Technical Support policies, operating hours, et cetera as business warrants.

I.IV. Basic Concepts of the Application

TimeClock Plus is a very simple-to-use, yet powerful, timekeeping application. The most important things to know are:

- ✓ Employees are identified by a numeric **Employee ID number** - this can be the same number you use to identify them in other systems (such as payroll), or the TimeClock Plus application provides the ability to cross-reference their TimeClock Plus ID number with their number in another system. Each employee may also have a **Badge number**. The system can be set to identify employees by employee ID number or Badge number, or both.
- ✓ Employees **can clock in/out in two ways**: via the On-Screen TimeClock on a personal computer or via TimeClock devices called RDTs (Remote Data Terminals). A combination of these two methods can also be utilized, for example you may have administrative employees with PCs on their desks clock in via the On-Screen TimeClock while Warehouse Personnel swipe their badges at an RDT device on the warehouse floor. This enables employees to clock in/out as close to their workstations as possible. As technology progresses, we are constantly looking at new ways to be able to track employee time.
- ✓ Time must be captured and tracked by a **Job Code** for every employee. The Job Codes you use can be as simple as Hourly, Sick and Vacation, or you can use job codes to designate the Departments an employee might work under, or Tasks they might perform.

Example:

Bob Smith may always work in Assembly (Job Code 1000), or maybe he floats from Assembly to Shipping (Job Code 2000) throughout the day and you want to track his movement between the two. If so, set him up to clock in/out using both job codes 1000 and 2000 and track his time in “real time” as he floats.

The TimeClock Plus system has two types of Job Codes, **clockable** and **non-clockable**. Clockable job codes are those used by an employee when clocking in. Non-clockable job codes are used to track time that is input manually by a system user (ex. Sick and Vacation Time may be input manually by a manager or someone in the HR Department).

- ✓ TimeClock Plus has the ability to track accrued time such as Sick Time, Vacation Time, PTO, etc. These accruals can be set to calculate based on hours worked during the week, or be a straight assignment of hours which post to an employee’s accrual balances at a particular point in time (weekly, monthly or annually). By setting up a “rule” for each accrual calculation, and assigning these rules to employees, accrual balances are available in the system.
- ✓ TimeClock Plus provides the ability to “**round**” an employee’s actual clock in/out times – either to their schedule or to a specified fraction of an hour. Rounding rules, if established in TimeClock Plus, are based on what a company’s pay policy(s) is for its employees. A few examples include:
 - An employee is scheduled to work 7:00 – 3:00. The pay policy states that if an employee arrives up to 8 minutes after their scheduled time (7:08) they will be paid based on their scheduled clock in time (7:00); however, if

they clock in more than 8 minutes late (7:10), they will be paid their actual clock in time (7:10).

- An employee does not work on a specific schedule. A pay policy states that if an employee arrives up to 5 minutes after the hour (say 8:05) they will be paid back to the hour (8:00); however, if they arrive more than 5 minutes after the hour (8:10) their clock in time will be rounded to the next quarter of an hour (8:15).
 - ✓ A **shift** is the time from when an employee clocks in till that employee clocks out – including any breaks taken during this time, whether they are paid or unpaid.
 - ✓ A **break** is a period of time during which the employee is NOT clocked in, but is still part of the current workforce. Up to four break types can be setup, each with their own break settings.
 - ✓ A **Close Week process** must be performed regularly in order to calculate and maintain accrual balances and archive the information. You must perform the Close Week process once all hours have been approved and any edits have been performed for a week. You can have up to 4 weeks “open” at a time. If the current date is more than 28 days past the end of the current week, the system will not allow an employee to clock in/out. (See Section 0 for more details on the Close Week process).
 - ✓ **Times** can be entered in either 12 hour or 24 hour formats, with or without a colon. The following are all acceptable: 5:15PM, 5.15p, 515PM, 17:15, 1715, 515p, 0515p
- Dates** can be entered using the full year such as 1999 or they can be entered without the century information such as 99 for 1999.
- ✓ TimeClock Plus allows all screen display and report data to be “filtered” via **Criteria** selections. We recommend that you review Section 4.5 of this manual before proceeding with the setup of the application because how you need to filter data will determine your use of several user-defined fields.
 - ✓ TimeClock Plus 4.2 provides the ability to add user-defined or “**Custom Fields**” on three record types within the system including the Employee, Job Codes, and Employee Job Code records. These custom fields provide you with the ability to add fields as needed to collect and manage information pertinent to your timekeeping practices.

I.V. Included Applications and Utility Programs

The TimeClock Plus application consists of several fully-integrated applications, they are listed as follows:

TimeClock Manager

The TimeClock Manager performs all functions related to management of the application and its data files. This includes such functions as initial setup and ongoing maintenance

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of personnel records, job codes, work orders, etc., the ongoing editing/managing of time data, payroll and attendance reporting, and the importing and exporting of data.

The On-Screen TimeClock

The On-Screen TimeClock can be used by employees to clock in/out via a personal computer (rather than a Remote Data Terminal device). It must be installed on every PC that will be used as a clocking station, and these PCs must be networked to the TimeClock Server PC.

TimeClock Scheduler

The TimeClock Scheduler is not required for basic gathering of clock ins and outs. However, in order to take advantage of the attendance functions provided by the TimeClock Plus application, schedules for each employee must be established in the TimeClock Scheduler (for tardiness and attendance tracking for example). The use of employee schedules also allows for the automatic rounding of employee time to their scheduled time, where applicable.

Module Manager

The TimeClock Plus Module Manager consolidates installation and management of all optional modules, including utilities required to use some of the Remote Data Terminals (RDTs) such as Handprint or Fingerprint administration. This application can be used to restrict who has access to certain modules as well as the management of company-wide modules such as Job Costing.

WinRemote

The WinRemote module controls all Remote Data Terminals (RDTs) utilized for clocking in and out. It is designed to run as a desktop application on Windows 98SE and above or as a desktop application or service on Windows NT 4.0 and above.

I.V.I. AutoUpdate Utility

Data Management, Inc. releases periodic updates to the TimeClock Plus application. These updates are made available to registered owners of the application via our website, www.timeclockplus.com, or through the AutoUpdate application. It is recommended that you run the AutoUpdate Utility on a periodic basis to ensure you are utilizing the latest version of the TimeClock Plus application.

I.V.II. Report Printer Utility

The Report Printer Utility is provided to allow the viewing and printing of TimeClock Plus-produced reports by computers that do not have the full TimeClock Plus application installed. It can be installed on an unlimited number of computers to provide for the sharing of reports with individuals who do not have access to the TimeClock Plus application.

I.V.III. Database Manager

The Database Manager is the application that allows the creation of the SQL database. This application is also where you enter your software Serial Number. For advanced

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SQL users who setup their own SQL users, the Database Manager is where you can assign SQL users roles.

I.VI. Optional Accessories and Software Modules

Data Management, Inc. is constantly expanding their product and service offerings so please contact your Sales Representative or visit our website at www.TimeClockPlus.com to see what may be new and of interest to you. At the time of publication of this guide, the following optional components were available:

I.VI.I. ACCESSORIES

Remote Data Terminals (RDTs)

RDTs are physical TimeClock devices used to collect clock ins/outs from those employees who do not have access to a PC and the On-Screen TimeClock. They are available in either **Serial** or **Ethernet** connectivity and with several different types of employee recognition systems including a basic numeric keypad (for entry by employee of their ID number), barcode or magnetic card swipe and even Biometric recognition (via fingerprint or hand).

- ✓ Serial devices – plug into a serial port in the back of a single PC or server
- ✓ Ethernet devices – plug directly into your TCP/IP network via a LAN drop. Thus you are not limited to placement of the devices by the availability of a PC. Ethernet Remote Data Terminals require a static IP address on your Lan/Wan.
- ✓ Biometric devices – available with Serial or Ethernet connectivity. These devices recognize an employee for clock in/out by reading their fingerprint or a 3-D image of their hand, depending on the model you select. These devices virtually eliminate the problem of “buddy-punching” which has become common in some work environments.

Barcode RDT Peripherals

DMI also offers several hand-held devices which can be used in conjunction with their barcode reader equipped RDTs. These devices allow you to read barcodes, using the standard 3 of 9 Barcode Font, directly from documents such as work orders when utilizing the TimeClock Plus application to collect time by work order, sub task, etc.

Desktop Biometric Recognition Devices

In addition to the RDT Biometric devices, DMI offers desktop fingerprint recognition devices for use in conjunction with the On-Screen TimeClock. As an employee clocks in/out, these devices match the employee finger print to a numeric record generated from their print when enrolled, to verify their identity. This virtually eliminates “buddy-punching” with PC-based clocking in/out.

I.VI.II. SOFTWARE

Payroll Modules

DMI offers payroll modules for most of the popular payroll software packages and service providers on the market such as QuickBooks and Peachtree. These modules produce an export file in the format required by these packages/providers for their import, thus eliminating the need to print data out of TimeClock Plus and key it into another application. Please contact your Sales Representative today to see if a module is available for your payroll solution.

Job Costing Module

A major component of project or cost accounting is tracking the costs associated with personnel at the project or work order level. The Job Costing Module allows you to add up to 3 additional levels of tracking to the employee's time (in addition to the employee ID and Job Code tracked in TimeClock Plus). For example, when Bob Smith worked 4 hours in Assembly on Work Order number 1368 of Project A for Customer number 100, the Job Costing Module captures the work order through customer number designations.

Barcode Printing Software

This module allows you to print your own barcodes for use with any of DMI's barcode reading RDTs and associated peripheral devices.

I.VII. Table of Contents – User Reference Guide Sections

Each of the User Reference Guide sections can be accessed and printed individually from the TimeClock Plus CD on an as-needed basis.

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Throughout the “Getting Started” sections of this User Guide are Quick Start boxes to point you to the next step of installation (depending on your configuration). An example follows:

QUICK START - NEXT STEP (Network Version):

Will you be using the On-Screen TimeClock for employee clock in/out?

YES – Proceed to Section 8 to configure the On-Screen TimeClock.

NO – Proceed to Section 3 to install the RDT Device(s).

Once your installation/setup is complete, print Section 9 for further information on managing the TimeClock application.

SECTION I: FOR THE UPGRADE CUSTOMER, INCLUDING WHAT’S NEW IN VERSION 4.2

Thank you for your continued use of TimeClock Plus! We believe you will find your additional investment well worth it as we continue to add new functionality based on the suggestions of our customers, just like you.

We begin this section with a brief overview of the new functionality in Version 4.2. The remainder of this section will instruct you on the actual upgrade process.

1. What’s New in Version 4.2!

1.1. The AutoUpdate Utility

1. The ability to download and install the latest version of a module with the use of its activation key.
2. The ability to submit a backup to support for them to review (requires Submission Id from support).

1.2. The Database Manager

1. The Database Manager is the application that must be run to create your TimeClock Plus SQL Database.
2. The Database Manager is where the Software Serial Number is entered.

1.3. The Module Manager

1. The Module Manager has been added to provide a more efficient and user-friendly method for installing and managing TimeClock Plus modules, especially for the distributed computing environment (such as over a LAN or WAN).
2. Individual access to modules can be restricted (where applicable) by computer.
3. Consolidates the management of module data as well. For example, Fingerprint Administration and Handscanner Administration no longer exist in 4.2, all of the data for those modules is handled in Module Manager.

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1.4. The TimeClock Manager

1.4.1. Changes to System Wide Settings:

1. The ability to track missed punches.
2. The ability to add in Timesheet hours. This allows you enter a block of time instead of an in and out time and date. It only requires an anchor time and date.



This can be used to enter vacation or PTO time with ease.

3. Clocked breaks can now be paid or unpaid.
4. User-defined fields, or custom fields, are available in three areas of the TimeClock Manager:
 - Employee Record (via the Custom tab)
 - Master Job Code list
 - Job Codes assigned at the employee level
5. Drop-down lists throughout the Manager can be defined on the fly – if the data you need does not appear in the drop-down list you can type it into the field and it will be added to the drop-down list for that field. An example is the Dept field (Employee > Add/Edit > Info tab).
6. You now have the ability to create your own Custom Fields that allow you to track any additional information. This is set up on a per employee basis.
7. Managers can now perform a mass approval of hours through the Approval Manager.
8. You can now enter tracked fields (e.g., parts, pieces, or tips) at the beginning, end, or both of a shift segment. You can also have the manager be the only one to enter the tracked field amounts.
9. New employee status column in the Who's here list.
10. The ability to have recurring holidays.
11. A Criteria button has been added to the Edit Hours screen to be able to filter employees.
12. Added the ability in Edit Hours to be able to group employees by Department or Classification.
13. The ability to enter notes into the call list to track if and when you contacted an individual.
14. Changed Criteria to be able to Include or Exclude criteria for employee number, class, or default job code.



This is useful if you want to filter and view only a few certain employees.

15. You can now export the hour edit/change log.
16. New security to prevent granting management approval to own shifts.
17. The ability to unclock a week.
18. More detailed tracking of Override logs.
19. More detailed punch location tracking.

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20. You can specify user access to reports.
21. New minimum shift segments.



This can be used to pay an employee for an hour even though he is only working for 30 minutes.

22. Ability to filter by number of edits in the hour edit log.

1.4.2. Changes to Employee Settings:

1. You can now enter a yearly figure for a salaried amount.
2. The **Info** tab contains three additional fields – Department (Dept), Badge and Network Id.
3. The Badge field allows you to assign a badge number to an employee instead of using the employee number. This is used when assigning badges to be used from the On-Screen TimeClock or Remote Data Terminals.
4. An employee can now clock in/out by their Id number or Badge number, depending on how your system has been configured.
5. The **Cumulative** tab on each employee's record has been completely revised to more efficiently present tardy, absence, accrual, raise and message history for each employee. It also shows cumulative job detail for that employee.
6. If a valid Hire Date is entered for employees, the system can be configured to automatically calculate and schedule a new employee review based on this date.
7. The addition of the **Access** tab on each employee's record makes it easy to determine which users have access to this employee's personal information.
8. If an employee has been terminated or suspended, by default, they will not show up in any employee lists (i.e. Edit Hours, Who's here).
9. Employee photos can now be in virtually any format and are stored in the database so they can be accessed from anywhere.
10. There is a built in restriction and rounding tester on the **Scheduler** tab.
11. There is now a Review/Anniversary/Birthday reminder bar to view that information quickly and easily.
12. New default rate for all job codes

1.4.3. Changes to Reports:

1. There is a new Job Code Group feature for each job code. This allows you to assign a job code to a group and run certain reports that subtotal by Job Code Groups.
2. You can now print reports to HTML for easy emailing and viewing in a web browser.
3. You can now print shift notes with the Complete Payroll report.
4. A Missed Punch report to view missed punches.

5. Added the Job Code Group Detail and Summary that group by employee or job code and subtotaled by Job Code Groups.
6. Added a Future Cost of Accruals report to print the estimated future cost of accruals for your current employees.

1.4.4. Changes to Accruals:

1. You now have the ability to set an accrual rule to start accruing after XX days and stop accruing after XX days. The days are based from the hire date.
2. You can import accrual totals.
3. You can now put a cap, or limit, on the amount that an employee can accrue.
4. You can now reset the accruals automatically either back to 0.00, or to a specified amount.
5. New accrual forecasting in Edit Hours gives you a forecast for the accruals taken and accrued each week.
6. The ability to not have accruals accruing for an employee before reaching their hire date, if they are suspended, or if they are terminated.

1.5. The On-Screen TimeClock

1. Access rules can be established for each On-Screen TimeClock so that employees can be allowed or restricted from use of a specific clock in station.
2. The On-Screen TimeClock has the ability for use with a serial scanner. This allows for QuickPunch and also allows for entering of the employee number, job code, or cost code from a barcode.
3. You can determine your employee Id by your network logon, or network Id.
4. More detailed information when viewing the last punch.
5. The ability to set different configuration settings for the On-Screen TimeClock. This allows you to specify different options to be available from different machines.
6. You can now view accrual information from the On-Screen TimeClock.

1.6. The WinRemote Utility

WinRemote is still utilized to manage communication with all RDTs in your timekeeping system. Following are the new features of this utility:

1. You can now specify separate companies for each port. This does require the Multi-Company module. This eliminates the use of a command line switch for this purpose.
2. Added the option to Auto set the baud rate of the RDT through the WinRemote software.
3. The ability in WinRemote to not allow a Quick Punch operation after X seconds from the last Quick Punch operation.
4. The ability to turn off the confirmation screen when performing a manual clock operation.
5. Access rules can be configured per port for allow or restrict access.
6. Automatic monitoring and refresh settings can be established per port.

1.7. What's New in Job Costing



Requires optional Job Costing Module

1. Added Cost Code Groups. This allows an individual to be able to only view certain cost codes when clocking in or out instead of the entire list.
2. When changing a cost code, the change will copy to existing records containing that cost code (if desired).
3. The ability to globally enable or disable Job Costing for Employees.
4. A new copy function on the master cost code list to copy descendents (child objects) from one code to another.
5. Added Budget Hours and Budget Dollars to the master cost code list.

SECTION II: GETTING STARTED – INSTALLING THE TIMECLOCK PLUS APPLICATION AND UPGRADING

2. Installing the TimeClock Plus 4.2 Software

The installation of 4.2 has 4 main steps that should be completed in order.

1. Install the Database Engine (SQL 2005 Express). Skip this step if you have an existing SQL server that you wish to use.
2. Install the TimeClock Plus Server.
3. Create your TimeClock Plus SQL Database in Database Manager.
4. Install the TimeClock Plus Clients.

TimeClock Plus 4.2 uses an SQL database. To run the SQL database, you are required to run either MSDE 2000, SQL 2005 Express, Microsoft SQL Server 7.0, or later.

Below are some commonly referred to terms and a brief description of each for clarification.

TimeClock Plus SQL Database – This is the SQL database that contains all of the information that TimeClock Plus records and stores.

TimeClock Manager – The management application of TimeClock Plus where all management of employees' information, hours, reports, et cetera is performed.

TimeClock Database Manager – This is the application that allows you to create, back up, and restore the TimeClock Plus SQL Database.

SQL 2005 Express – This is an SQL Engine from Microsoft that is included with TimeClock Plus. It is installed when you install the Database Manager.

Microsoft SQL Server – This is the retail version of SQL 2005 Express and it is not required to run TimeClock Plus 4.2. If you have an existing Microsoft SQL Server,

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version 7.0 or later, you can install TimeClock Plus to run on your existing SQL Server. If you are going to use your existing SQL Server, you do not have to install SQL 2005 Express.

If you have an existing SQL Server and do not want to have TimeClock Plus run on your SQL Server, you can install SQL 2005 Express and run it on the same machine that is running SQL Server 8.0 or later.

To reference the TimeClock instance, it would be \\server name\TimeClock Plus.



You may wish to install on your existing SQL Server. TimeClock Plus 4.2 is supported on Microsoft SQL Server version 7.0 or later. If you do not wish to install using your existing SQL Server, or you do not have an existing SQL Server, SQL 2005 Express has been provided on the TimeClock Plus CD.

2.1. Installing on a Server or a Standalone Computer

This section will cover installing the TimeClock Plus software on your server or for a stand-alone computer.

Server/Single User Install



1. The first step is installing the Database Engine (SQL 2005 Express). Skip this step if you have an existing SQL server that you wish to use.
 - a. Insert the TimeClock Plus CD into your CD-ROM drive. If auto-run is enabled, a menu will appear. If auto-run is not enabled, click the

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Start menu and select **Run**. Enter X:\SETUP and click **OK** (where X is the drive letter of your CD-ROM drive).

- b. Click **Install TimeClock Plus Database Engine** to install SQL 2005 Express.



If you will be using your existing SQL Server, it must be Microsoft SQL Server version 7.0 or later.

2. The next step is to install the TimeClock Plus Server.

- a. With the TimeClock Plus 4.2 CD in the CD-ROM, click the **Start menu** and select **Run**. Enter X:\SETUP and click **OK** (where X is the drive letter of your CD-ROM drive).



- b. Choose **Install TimeClock Plus Server** from the options. This will start the install for the server install. Click on **Next** to advance to the next screen.
- c. View the License Agreement and if you accept the terms, set the option, and click **Next**.
- d. On the Customer Information screen enter your User Name and the Name of your Organization or Company. You have the option to 'Install this application for:'

Anyone who uses this computer (all users) – This will make the specified TimeClock Plus applications available to anyone who logs onto this machine.

Only for me – This will make the specified TimeClock Plus applications available only to the user specified above in the User Name field.

- e. Once your options are configured, click **Next** to continue on to the Setup Type options.

For the setup type, you should choose the option that is best for your installation needs.

Complete – This option will install all of the TimeClock Plus applications with all defaults. The default installation directory will be C:\Program Files\TimeClock Plus 4.2.



This option requires the most disk space.



If you want to install to a different directory other than the default directory, you must choose the Custom installation option to change the installation directory.

Custom – This option will allow you to specify which TimeClock Plus applications you would like to install or not install. This also allows you to change the installation directory.

- f. The Desktop Shortcuts screen allows you to specify which application shortcuts to be created on your desktop. If you check the application, an icon will be placed on your desktop for easy access to that specific software application.

Once you set your configuration, click **Next**.

- g. If you chose the Complete Setup, the next screen will be the final screen and when you click 'Install' it will install the applications as you specified during the wizard.

If you chose the Custom Setup, the next screen will provide you with your install options. This is where you specify what applications you want installed and what directory you want to install them into. For a detailed list of how each option works, hit the **Help** button. Once you have chosen the applications you wish to install, click **Next**. The next screen will be the final screen and when you click 'Install' it will install the applications as you specified during the wizard.

4. Next, create the TimeClock Plus SQL Database in Database Manager.
 - a. Launch Database Manager by going to **Start > Programs > TimeClock Plus 4.2 > Database Manager**.
 - b. When you launch the Database Manager, you will be prompted with a SQL Connection Settings screen.

SQL Server

For SQL 2005 Express, enter the SQL Server name of the computer running SQL 2005 Express. After the name, you should

enter the name of the instance that TimeClock Plus was installed as. For example, if my server machine was named Server1, for the SQL Server, I would enter SERVER1\TIMECLOCKPLUS. The format is: <server name>\<instance name>

For an SQL Server, enter the name of the SQL Server. For example, if my server machine was named Server1, for the SQL Server, I would enter SERVER1. The format is: <server name>

Windows Authentication – Windows Authentication is based on your Windows users. The Window users on your network will need to be granted permissions to the database (via the SQL Server's management application). This should be set if you are connecting to your SQL Server across a Local Area Network (LAN) or Wide Area Network (WAN) where you can authenticate with your Windows Server. If you have further questions on Windows Authentication, consult your Network Administrator or IT Department.

SQL Authentication – SQL Authentication is based on your SQL users rather than Windows. If you are connecting to the SQL Server across an internet connection, or some type of connection where you cannot log on to your network as you normally would, it will require SQL Authentication. If you have further questions on SQL Authentication, consult your Network Administrator or IT Department.



If you are not sure which Authentication method is best for your setup, you may consult your network Administrator or IT Department. In most cases, Windows Authentication will suffice.

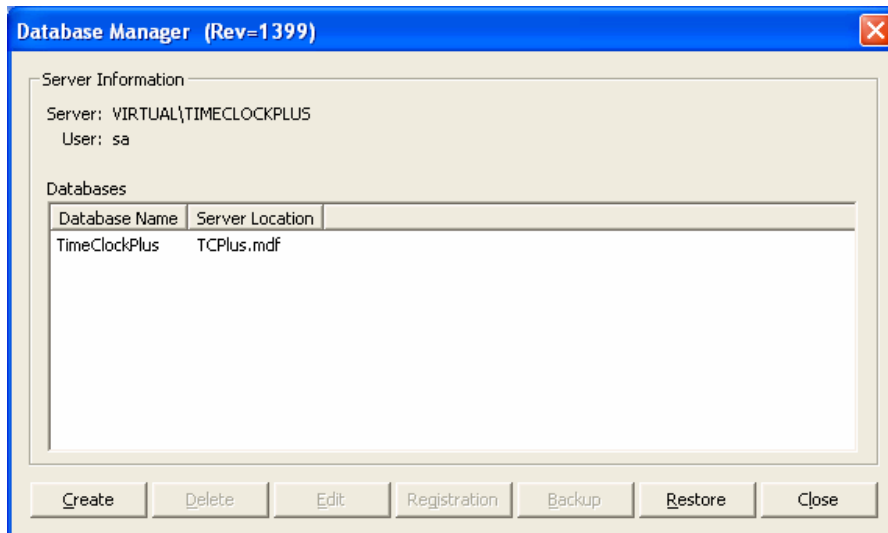
SA Password – If you are using SQL Authentication, it requires that you enter the SA user's password to connect to the instance of SQL running TimeClock Plus. If you installed the version of SQL 2005 Express provided on the TimeClock CD, click **Use Default** for the default password.



The default password is the default password for SQL 2005 Express when it's installed from the TimeClock Plus CD. If you are running SQL Server, the default password may not work because one was already set up that is different than the TimeClock Plus default. If it is different than the default and you do not know what your SA password is, contact your Network Administrator.

- c. Once the Database Manager is open, you can click on the **Create** button to create your TimeClock SQL Database. You will be prompted to enter your Company name and Software Serial Number. Once you have those entered, you may click **OK** and the

TimeClock Plus SQL Database will be created. If the process was successful, you will receive a message saying it was successful. If you received any warning/error messages you may try the process again, but if it continues to fail, you will want to contact TimeClock Plus Technical Support.



2.2. Connecting to the TimeClock Plus Database to Create a Company

New users will want to proceed with the steps below to create a new company.

Upgrading users (users who are upgrading from 4.1 or earlier) should skip this section and refer to **2.4. Converting Data from TimeClock Plus 4.0 and 4.1.**

1. Launch TimeClock Manager by going to **Start > Programs > TimeClock Plus 4.2 > TimeClock Manager**. Once TimeClock Manager opens, you can begin the process of creating a company.

If it prompts you to reconfigure settings, click **Yes**:

SQL Server

For SQL 2005 Express, enter the SQL Server name of the computer running SQL 2005 Express. After the name, you should enter the name of the instance that TimeClock Plus was installed as. For example, if my server machine was named Server1, for the SQL Server, I would enter SERVER1\TIMECLOCKPLUS. The format is: <server name>\<instance name>

For an SQL Server, enter the name of the SQL Server. For example, if my server machine was named Server1, for the SQL Server, I would enter SERVER1. The format is: <server name>



Connection method should be set to Default.

Windows Authentication – Windows Authentication is based on your Windows users. The Windows users on your network will need to be granted permissions to the database (via the SQL Server's management application). This should be set if you are connecting to your SQL Server across a Local Area Network (LAN) or Wide Area Network (WAN) where you can authenticate with your Windows Server. If you have further questions on Windows Authentication, consult your Network Administrator or IT Department.

SQL Authentication – SQL Authentication is based on your SQL users rather than Windows. If you are connecting to the SQL Server across an internet connection, or some type of connection where you cannot log on to your network as you normally would, it will require SQL Authentication. If you have further questions on SQL Authentication, consult your Network Administrator or IT Department.



When you create the TimeClock Plus database with Database Manager, a SQL user called tcuser will be created with the necessary role memberships. The tcuser's default password will be entered when you select: SQL Authentication. The Default button will also populate the Password field with tcuser's default password.

2.3. Error Messages

The following are some potential error messages that you might receive during the installation.

Error: Connection could not be established: Invalid connection string attribute

Solution: You may receive this error message if you have entered the wrong SQL Server. If you are using SQL 2005 Express, make sure that you have entered the correct instance to connect to. For example, if the SQL server is Server1, you will want to enter Server1\TimeClockPlus in the SQL Server field. The format should be: <server name>\<instance>.

Also, check your password. If you are using SQL Authentication and you enter the wrong SA password in Database Manager, this error will come up. Remember that the SA password is not a TimeClock Plus password, but your SQL SA password. So if you already have SQL or SQL 2005 Express installed, and have passwords set up, the SA password may not match the TimeClock Plus default SA password.

Error: Open Failed: Invalid connection string attribute.

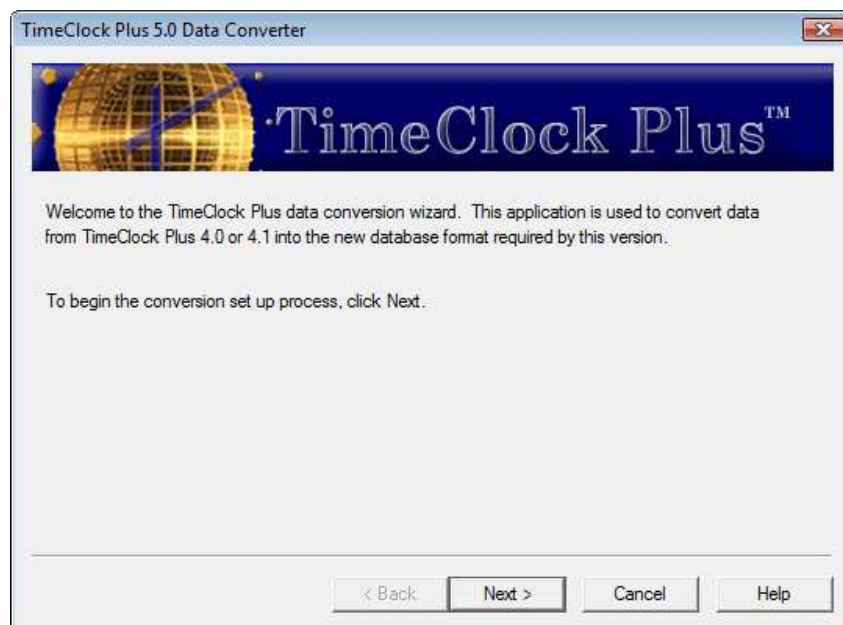
Solution: You may receive this error message if you have entered the wrong SQL Server. You may also receive it if you have entered the wrong database name, or if you don't have access. So check the SQL Server and the database name. Also check the SQL user's rights to the database.

If you are using SQL 2005 Express, make sure that you have entered the correct instance to connect to. For example, if the SQL server is Server1, you will want to enter Server1\TimeClockPlus in the SQL Server field. Where, Server1 is the server name and TimeClock Plus is the MSDE instance. <server name>\<instance>.

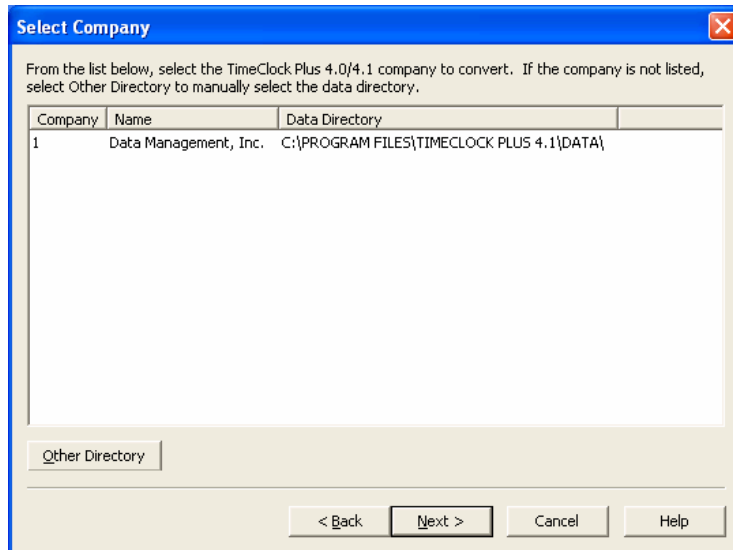
2.4. Converting Data from TimeClock Plus 4.0 and 4.1

With TimeClock Plus 4.2, there is a built in data conversion utility that converts data from versions 4.0 and 4.1 for use with TimeClock Plus 4.2.

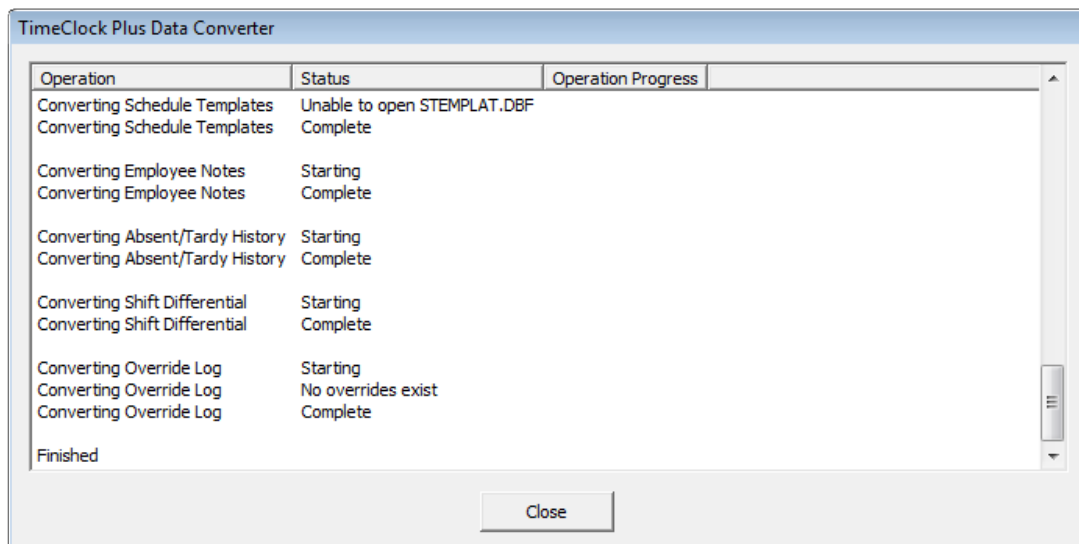
1. There is a utility located in the TimeClock Plus program directory called convert.exe. Once opened, it will walk you through the conversion process.



2. After clicking **Next** on the Welcome screen, you will reach a Select Company screen where you need to choose your existing 4.0/4.1 data directory. Once you have it selected (highlighted), click the **Next** button. If the company is not displayed, you can browse for the company data directory. This is useful if you just want to move the TimeClock Plus data to the server for conversion.



3. Once you click **Next**, you will reach the SQL Settings screen. This is where you specify your connection settings to connect to the TimeClock Plus SQL database. These should be the same settings that you set when you were connecting to Database Manager (see section 2.1 to review those connection settings). Once you have the correct settings, click **Next** button.
4. The next screen is the **Conversion Summary** and it allows you to adjust your Company Number or Name when converting the data. If you would like to change either one of those options, do that now.
5. Once you have the company information as you would like it to be in 4.2, click **Finish** to begin the conversion process.
6. Once the conversion process is complete, the **Close** button will become available. Click **Close** to close the Data Converter. You can then launch TimeClock Manager and select your company.



2.5. Installing on a Client

The application can be installed on a network server, or on any workstation on the network (which would serve as the TimeClock Server). All workstations that will be accessing the TimeClock Plus application on the network will require a client installation.



To enable other users on the network to access TimeClock Plus, a “network share” must be created for the directory where the TimeClock Plus program files are installed.



The TimeClock Plus folder must be available to all client computers on the network. If you are unsure how to do this, please consult with your network administrator. Clients need “Read” access to the TimeClock Plus folder on the server. This is so that clients can be able to read the program files to run from the client machine.

Client Install

1. Insert the TimeClock Plus CD into your CD-ROM drive. If auto-run is enabled, a menu will appear. If auto-run is not enabled, click the **Start menu** and select **Run**. Enter X:\SETUP and click on the **OK** button (where X is the drive letter of your CD-ROM drive).
2. Click on **Install Client** to launch the Client Install Shield Setup Wizard.



3. Click on the **Next** button to proceed to the next screen once you have set the options on each screen.
4. View the License Agreement and if you accept the terms, set the option and hit **Next**.
5. On the Customer Information screen enter your User Name and the Name of your Organization or Company. You have the option to ‘Install this application for:’

Anyone who uses this computer (all users) – This will make the Database Manager available to anyone who logs onto this machine.
Only for me – This will make the Database Manager available only to the user specified above in the User Name field.

Once you have your options configured, click on the **Next** button to continue on to the Setup Type options.

6. On the TimeClock Plus Folder Location screen, enter the location on your server where the TimeClock Plus program files are located. This will be the shared directory/folder that the client machines can access. Once you have your folder specified, click on **Next** to continue on to Custom Setup options.
7. On the Custom Setup options screen, you can specify what programs you want your clients to have access to. If you do not want the user to have

access to a specific part of the software, such as TimeClock Manager, or Scheduler, then click on that program and a drop down list will appear. If you do not want them to be able to access that particular application, set the option to 'X This feature will not be available'. If this option is set, a shortcut to the application will not be created. Once you have your applications configured that you want to appear on the client machine, click on the **Next** button. The next screen will be the final screen and once you click Install, the specified client applications will become available from the client machines.

8. Once the install is complete, you may go to Start, Programs, TimeClock Plus 4.2, and you will have access to the TimeClock Plus applications that you specified during the install.



You can run the client install by running the tcp42clnt.msi file located on the TimeClock Plus CD. It is located on the CD in the Install directory in the Client folder. X:\Install\Client\tcp42clnt.msi.

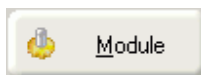
2.6. Installing Optional Modules

Several optional modules are available for TimeClock Plus 4.2, including Payroll Export Modules for exporting hours to applications such as QuickBooks and Peachtree, Job Costing, Multi-Company, and others. These modules can be installed by downloading the module via the AutoUpdate process or adding an E-mailed module (both methods require the use of an Activation Key provided by your TimeClock Plus representative). Once they are downloaded, or added to Module Manager, they have to be enabled through Module Manager.

2.6.1. Installing Through AutoUpdate

The preferred method of installing a module is through the AutoUpdate utility. The steps of downloading a module through the AutoUpdate utility are as follows.

1. Open the **AutoUpdate Utility**.
2. Click the **Module** button.



3. Input the activation key provided by your TimeClock Plus Sales representative or by the TimeClock Plus Support Technician for this module, and click **OK**.
4. The module will be downloaded and added in the list of available modules in Module Manager.

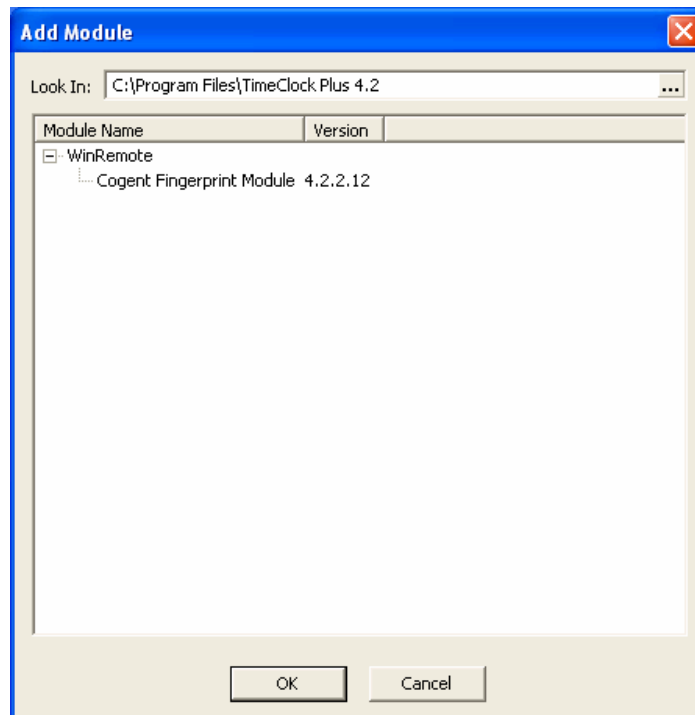


Any time you are using AutoUpdate, you must have an internet connection already established. If not, AutoUpdate will not be able to retrieve the updates/modules until a connection to the internet is made.

2.6.2. Adding the Module from File

In the event that a module cannot be acquired through AutoUpdate, a module can be added if it is E-mailed from a TimeClock Plus Support Technician. In order to add the module into the list of modules in Module Manager, complete the following steps.

1. In the **TimeClock Plus Module Manager** window, click the **Add** button.
2. In the **Add Module** window, click the browse (...) button. Browse to the location of the .dll or .exe file for this module and click **Open**.



3. Select the module from the list and click **OK**.
4. Input the activation key provided by your TimeClock Plus Sales representative or by the TimeClock Plus Support Technician for this module, and click **OK**. This module will be added in the list of available modules in Module Manager.



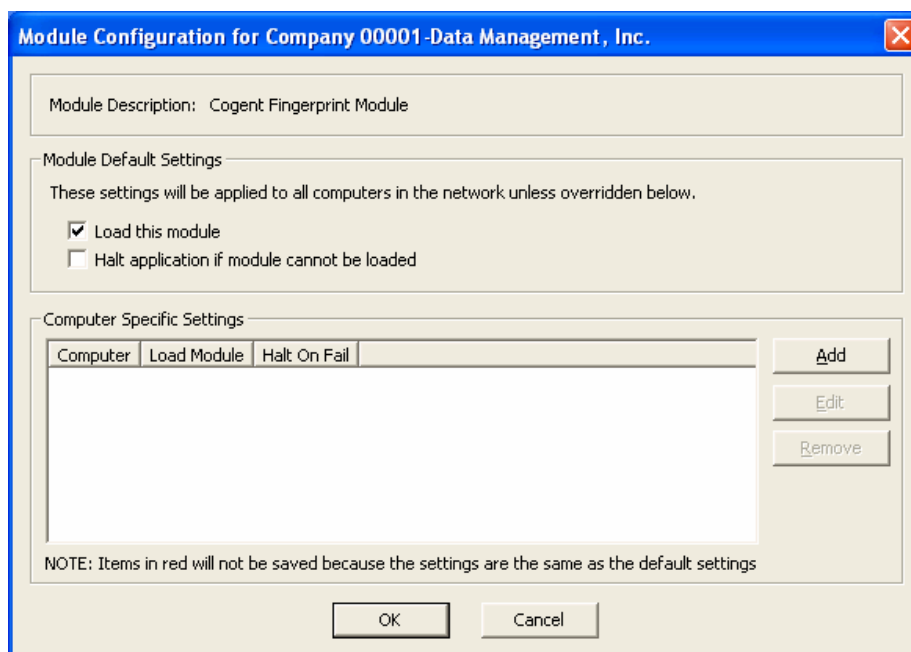
Once the module has been added to Module Manager, it must now be activated. When you install a module in Module Manager, it is automatically activated for the current company.

2.6.3. Loading the Module

Loading of any module is done through the Module Manager. Module Manager is used to manage which machines each individual module will be loaded on.

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1. Open the Module Manager.
2. Select the company.
3. Select the tab of the module type to be configured.
4. Select the module to be configured from the list, and click edit. Depending on the module type, different options are available for loading. The three exceptions listed above cannot be loaded individually, and must be loaded on all machines available.
5. To enable, or activate the module for this company, highlight the module, and then click on the **Edit** button.
6. When you edit the module, you will see an option to 'Load this module'. If you check that option, that module will become available for that company the next time you open TimeClock Manager.



7. The option to 'Halt application if module cannot be loaded', if checked, prevents the TimeClock Plus application from opening if the module cannot load. Once you have enabled or activated that specific module, you can then go into the application that uses that specific module (Manager, WinRemote, On-Screen TimeClock) to begin configuration of that module.

QUICK START - NEXT STEP (Network Version):

Will you be using the On-Screen TimeClock for employee clock in/out?

YES – Proceed to Section 8 to configure the On-Screen TimeClock.

NO – Proceed to Section 3 to install the RDT Device(s).

SECTION III: GETTING STARTED

INSTALLING/CONFIGURING RDT DEVICES

This section provides instruction on the installation and configuration of both types of Remote Data Terminals – Ethernet and Serial connections. Both types are available with several different employee recognition systems including a basic numeric keypad (for entry by employee of their ID number), barcode or magnetic card swipe, and even Biometric recognition (via fingerprint or hand scans). Using an RDT, employees can clock in/out via a remote TimeClock device rather than via the On-Screen TimeClock.

It is important to note that 2000 Series and Mark II Series RDTs are not stand-alone devices. They have no memory or processing power of their own. Their purpose is to collect punches and communicate those back to the TimeClock Plus application in real time. They can also be configured to allow employees to perform timekeeping related functions such as view their hours worked, view their schedule, etc.

The WinRemote Module, provided with the TimeClock Plus application, is used to control serial and Ethernet RDT devices. This module must be configured as part of the initial RDT setup process AND it must be running as an application or a service for any/all RDTs to function.



WinRemote is capable of controlling multiple Ethernet and serial-connect RDTs at one time, based on port assignments.

3. Installing/Configuring RDT Devices

There are three steps to installing all RDT(s):

- Step 1** - Configuring the WinRemote application (Sect. 3.1),
- Step 2** - Physically connecting the RDT(s) to your computer system (Sect 3.2-Serial, Sect. 3.3-Ethernet), and
- Step 3** - Configuring port settings for the RDTs to manage communication (Sect. 3.4).



The WinRemote Application is used to control communication with RDTs and must be running as an application or as a service in order for any RDTs to function.

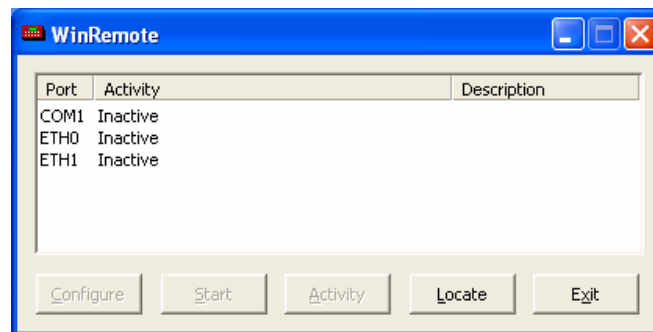


Each RDT must be connected to a computer running the WinRemote Module (either directly cabled for serial devices or via the network for Ethernet devices).

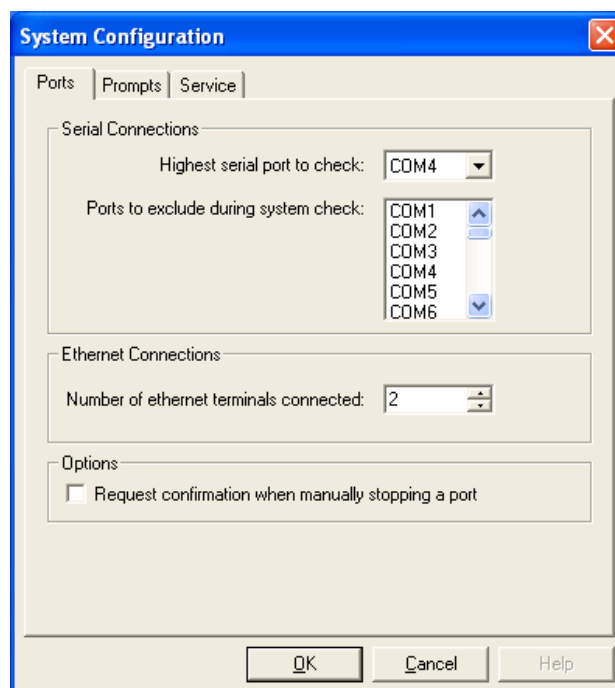
3.1. Configuring the WinRemote Application (for RDTs)

WinRemote manages all RDT devices used in your TimeClock Plus timekeeping system, serial and/or Ethernet. This section instructs you on setting the options included in WinRemote.

1. If you are not currently in WinRemote you must launch it to begin the configuration process. You can launch WinRemote by going to Start, Programs, TimeClock Plus 4.2, and WinRemote. The **WinRemote** window will display.



2. Once the **WinRemote** window is displayed, right click on the small terminal icon in the upper left hand corner of the window and choose "Configure System". The **System Configuration** window will display with the following three tabs of options to define.



3.1.1. The **Ports** Tab

This tab is used to set parameters for all Serial and Ethernet communication ports to be used by the WinRemote application.

Serial Connections:

Highest Serial Port to Check – Input the number of the highest port that the WinRemote software should check when searching for a serial connection. Setting this option will prevent the system from unnecessarily having to check ports that do not exist. (Ex. If the highest numbered port in your system is COM3, this should be set to COM3.)

Ports to Exclude During System Check – If you have ports in your system that will not be used for TimeClock Plus RDTs, you should exclude them so they will not be included in system checks (ex: If you have a modem on COM3, exclude it from the list by selecting it). Multiple ports can be selected by holding the **CTRL** key while clicking on the port IDs.

Ethernet Connections:

Number of Ethernet terminals connected – input the number of Ethernet RDTs that will be controlled from the WinRemote application.

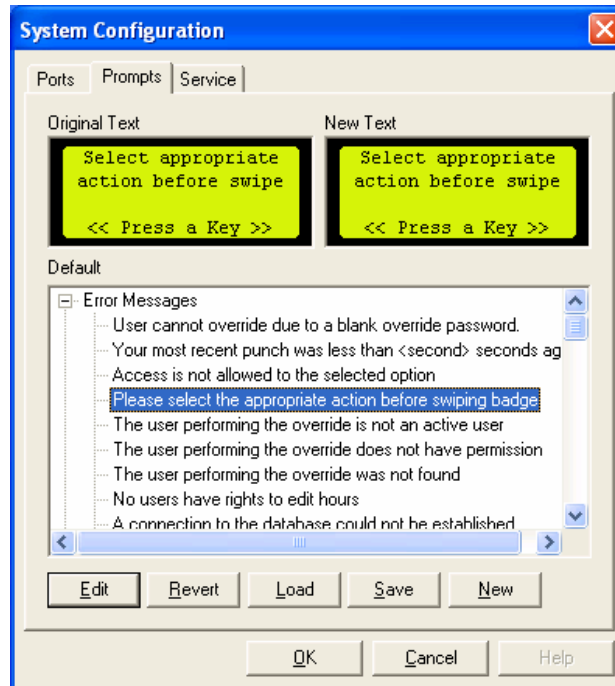


Once the number of Ethernet connections is set you must exit and restart the WinRemote application to enable the Ethernet ports. They can then be accessed for port configuration (see Section 3.2.2).

3.1.2. The **Prompts** Tab

All screen prompts that display on RDT devices are defined in WinRemote and can be personalized to meet your needs (default prompts are provided). For example, you may want to change the phrasing on an error message to help employees better understand the action they must take if the message is received during clocking operations. Screen prompts are saved in files called Prompt Files.

You can have multiple Prompt Files and assign separate prompt files to individual RDTs as needed. For example, you may have a file that contains all of your default messages in Spanish rather than English. This file could be assigned to an RDT device in a particular location where Spanish is the primary language used to communicate with your employees.



The Editor on this tab is used to edit the prompt files and add new ones. It is divided into three sections:

- ✓ The name of all prompts is displayed in the Default window,
- ✓ The original text contained in each message displays in the Original Text section, and
- ✓ As you edit the text, those changes appear in the New Text box.

Functions that can be performed with the prompt editor are as follows:

3.1.2.1. To Edit an RDT Message:

1. Begin the edit by clicking on the message you wish to edit in the Default selection box (it will display highlighted) and pressing the **Edit** button. The **Edit Prompt** box will display with the four lines of characters/instruction that can display on the RDT device in separate input fields.

2. Edit each of the four lines of the prompt in the Line 1 through Line 4 input boxes and set the alignment for each line in the drop down Alignment box to the right of each.



Two wildcards can also be included in a line - %e and %p. If you wish to display the employee's name on a line, input %e on the line. If you want <<Press a Key>> to display on the line, input %p on the line.

3. The center section of the screen provides three informational fields for you as follows:

Requires input – if “yes”, when this Prompt displays the employee is required to provide some sort of input at the RDT. Prompts that require input must have an asterisk somewhere in the prompt to designate where the cursor will be placed to receive the input after the prompt displays.

For example, if requesting an employee ID number a prompt line may be "Enter number:*".

Input length – if input is required this field will display the length of the input to be retrieved.

Substituted fields – in some prompts the system will substitute information into some fields in the prompt. For example, when the system displays the date and time of the clock in, the prompt might be "Date:%1 Time:%2". The %1 and %2 fields designate that a replacement will take place when the prompt is displayed. If you change a prompt with substituted fields, your new prompt must include these fields if you want to continue to display this information.

4. Once your input is complete, press **OK** to save the new RDT message, or **Cancel** to return to the previous screen without saving your input.
5. Press **Save** to save the edits/changes made to your Prompt file.

3.1.2.2. To Revert to the Default for a Message:

1. Click on the message you wish to revert to its default from the Default selection box (it will display highlighted)
2. Press the **Revert** button and the messages original default text will be loaded.
3. Press **Save** to save the changes you made by reverting to the default message.

3.1.2.3. To Load a Saved Prompt File:

As previously mentioned, the WinRemote Module allows you to have several versions of prompt files (ex: you may have a Spanish version as well as an English version). To make edits to a saved file it must be loaded into the Prompt Editor. All subsequent edits will be saved to this prompt file until it is saved and another Prompt File loaded. To load a saved Prompt File,

1. Press the **Load** button on the System Configuration screen of WinRemote.
2. Select the file you wish to load from the Load Prompt File windows box and press **Open**. The text for the saved Prompt File will be loaded in the Original Text and New Text boxes.
3. You can now **Edit** the loaded Prompt file, **Revert** it to its default or make no changes by pressing **Cancel**.

3.1.2.4. To Create a New Prompt File:

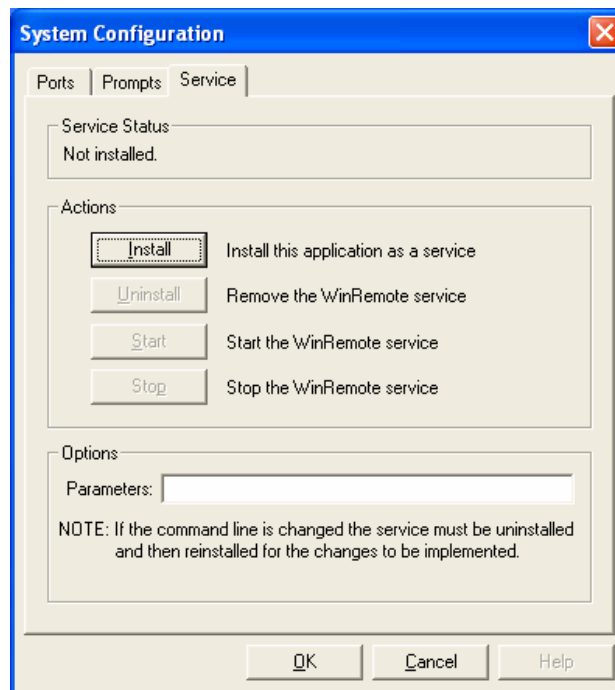
1. Ensure that the Prompt file you want to begin your new file from has been Loaded.
2. Make any edits to the original text for the Prompt File in the New Text box.
3. When edits are complete, press the **Save** button and input a name for the new file (including location) in the Save Prompt File windows box.

3.1.3. The **Service** Tab



Services are only available on Windows NT/2000/XP installations

WinRemote can be run as a service on Windows NT, 2000, or XP. When it does, it starts automatically and runs constantly in the background of your system, regardless of who is logged in, as long as the PC is running.



Service Status – displays the current status of the WinRemote Service (“installed” or “not installed”).

3.1.3.1. To Install WinRemote as a service –

1. Press the **Install** button.
2. Once installed, you must press the **Start** button to activate it.

3.1.3.2. To Uninstall WinRemote as a service – Press the **Uninstall** button.

3.1.3.3. To Stop the WinRemote service (once it has been started) – Press the **Stop** button.

Options – Parameters: allows you to specify additional command line parameters that will be used when the service is activated. Nothing should be entered in this box unless speaking to a TimeClock Plus Support Technician.

QUICK START – NEXT STEP: The physical connection and configuration of RDT device(s). For Serial Connect devices, see Section 3.2. For Ethernet-connect devices, see Section 3.3.

3.2. Setting up a Serial-Connect RDT



Perform an initial test on the RDT - Do not run the serial cable through walls, in ceilings, or routed in any other manner or mount the RDT on a wall/desk until the RDT has been tested using the 6-foot serial cable provided.

Each serial-RDT ships with a 6-foot serial cable (unless a longer length was ordered), two adaptors (one DB9 and one DB25), and one power adaptor.

3.2.1. Step 1 of 2: Physically connecting the serial RDT(s)

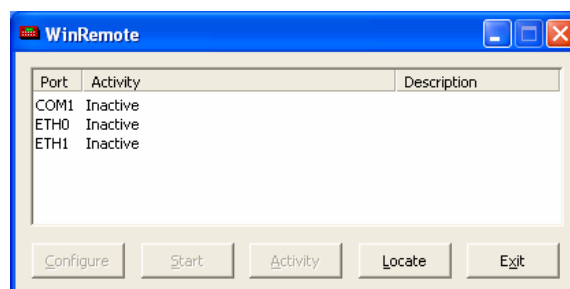
1. Connect the serial cable to the RDT – plug one end into the RJ-11 connection on your RDT labeled “Comm” or “Serial Comm”.
2. Connect the serial cable to your computer:
 - o Connect the other end of the cable into either the 9-pin or 25-pin adaptor that matches the serial port on your computer.
 - o Connect the adaptor to an available serial port on the back of your computer.
3. Connect the power supply to the terminal and then plug it into a standard 110V electrical outlet.
4. The terminal should begin its self-initialization and display “waiting for host” on the LCD screen.

3.2.2. Step 2 of 2: Configuring the WinRemote application for a serial RDT(s)

As previously mentioned, each RDT must be connected to a computer that is running the WinRemote application. To begin the configuration of WinRemote, you must launch it from the PC that the RDT was physically connected to in Step 1.

To launch WinRemote, two methods are provided:

1. From within the TimeClock Manager, select “Launch”, then select “WinRemote”
2. From the TimeClock Plus program group via Windows Start.
3. The following screen should appear.



4. Click on the **LOCATE** button on the WinRemote screen. This prompts the WinRemote application to seek out any serial RDTs connected to this PC. If the RDT(s) is properly connected to the computer, the WinRemote software will display the BIOS version of the terminal. Otherwise it will say “valid RDT port”. This message means that an available communications port was found on your computer, but no communication could be established with the RDT.



If the RDT was not located, check your cable connections to the Serial RDT and perform the locate function again.

5. Once the RDT has been located you must configure the port being used for communication. The configuration process sets what and how you will communicate with the RDT and is addressed in Section 3 of this guide.



Perform the port configuration now (go to Section 3.4), then return to this point.

6. Once the port has been configured select it from the list and click on the **Start** button to activate it.
7. View the RDT screen to verify that it is now active. The terminal will have the clock in and out options displayed on its screen and you can begin using it for clocking operations.

3.3. Setting up an Ethernet RDT



TCP/IP must be installed and configured on the computer that will be running the WinRemote Module to control communication with the Ethernet RDT(s).

3.3.1. Connecting and Configuring the Ethernet RDT

1. Connect the Ethernet cable to the RDT – plug one end into the RJ-45 connection on your RDT labeled “Ethernet”.
2. Connect the Ethernet cable to your network – connect the Ethernet cable to an available hub or switch on your network.



The Ethernet cable used for the CMI RDTs is a standard category 5 crossover network cable. One is shipped with each Ethernet RDT, but if misplaced, you can use a standard network crossover cable to replace it.

3. Connect the power supply to the terminal and then plug it into a standard 110V electrical outlet.
4. The RDT should begin its self-initialization/self-test. Once this is complete, press the **CLOCK OUT** and **YES/ENTER** buttons on the RDT at the same

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time. The RDT will display diagnostic information on the LCD screen for a few moments, and then will display the prompt "Quick Check Mode". This is a diagnostic routine that you will NOT run at this time so press the **NO** button on the RDT.

5. The RDT will display the prompt "Ethernet Setup", press the **YES** button to accept. The Ethernet Setup screen will show the current IP configuration for your Ethernet RDT.



The top of the screen displays command prompts that will aid you in setting up the IP address, as follows. If you are unfamiliar with IP addresses, please contact your Network Administrator or IT Department.

6. Where indicated, enter the correct IP address and press the **ENTER** button on the RDT.



This IP address must be a static IP address and also accessible by the computer that will be controlling the RDT. If you do not know an available static IP address, consult your Network Administrator or IT Department.

7. The RDT will next prompt you to enter a Terminal Port address. This address is set to a default of 3001 that is acceptable for most installations. Press the **ENTER** button on the RDT to accept this Terminal Port.



It is recommended that you do not change the Terminal Port address unless instructed to do so by TimeClock Plus Technical Support. Press the ENTER button on the RDT to accept this Terminal Port.

8. The RDT will prompt you to input the Subnet Mask. Once you have entered the subnet mask numbers, press the **ENTER** button to continue.



The subnet mask used should match the subnet mask on the network where the terminal is being configured. If you do not know what your network subnet mask is, consult your Network Administrator or IT Department.

9. The RDT will prompt you to input the Gateway. Once you have entered the Gateway, press the **ENTER** button to continue.



The Gateway used should match the Gateway of your network where the terminal is being configured. If you do not know what your network Gateway is, consult your Network Administrator or IT Department.

10. The RDT will prompt you to Update Linc, press the **YES** button on the RDT to begin the update procedure (or the No button if you need to return to any of the previous steps to make corrections).

11. The RDT will once again display the prompt "Ethernet Setup". If all settings were entered correctly press the **NO** button on the RDT to proceed to the next step (or the **YES** button if you need to return and make corrections).
12. The RDT will display the prompt "Ethernet Status". To view this option hit the **YES** button. Press the **NO** button to proceed.



The Ethernet Status option allows you to view if the RDT is connected to a network hub or switch. It also allows you to view the name of the host that is connected to the clock. And it shows the status, whether it is active or not.

13. The RDT will display the prompt to enter Biometric Setup. You have the option to Autotune the sensor, run a Bio Sensor Test, or check the Biometric Version.

To view these options hit the **YES** button. Press the **NO** button to proceed.



The Autotune or Bio Sensor Test should *never* be run unless on the phone with a TimeClock Plus Support Technician and instructed to do so.

14. The RDT will display the prompt "Auto Test". To view this option hit the **YES** button. Press the **NO** button to proceed.



The Auto Test runs a series of internal diagnostics on the RDT.

15. The RDT will display "Exit Offline Mode", press **YES** button on the RDT. This places the RDT back into the ready mode.
16. A self-test will perform and the "Waiting for Host" prompt will display again. Once communication is reestablished, the terminal is ready to use and the TimeClock Plus clock in/out screen will appear on the RDT display.
17. Once the RDT has been configured, you can begin to configure the port being used for communication. The configuration process sets what and how you will communicate with the RDT and is addressed in Section 3 of this guide.



Perform the port configuration now (go to Section 3.4.1), then return to this point.

18. Once the port has been configured select it from the list and click on the **Start** button to activate it.

19. View the RDT screen to verify that it is now active. The terminal will have the clock in and out options displayed on its screen and you can begin using it for clocking operations.

3.4. Configuring Individual Port Settings for each RDT

In Section 3 of this guide, overall configuration of the WinRemote application was addressed. There are also individual WinRemote settings for each Port/RDT device that need to be established. These are addressed in this section (both serial and Ethernet devices).

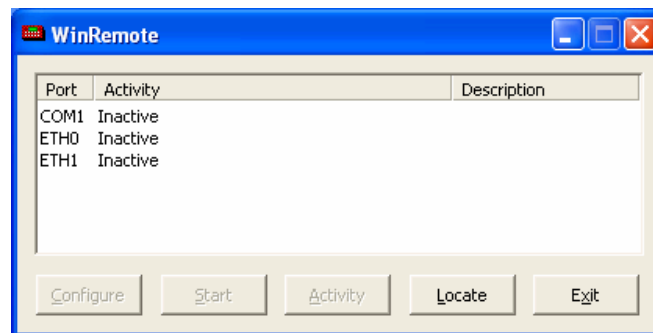


As previously mentioned, because WinRemote is used to control communication with an RDT(s), it must be running in order for any RDTs to function.

There are several tabs used in the WinRemote Port/RDT Configuration process. This section instructs you on setting options on each tab.

3.4.1. Accessing port configurations:

1. If you are not currently in WinRemote you must launch it to begin the port configuration process (via the TimeClock Manager “Launch” Menu or Windows, Start, Programs)



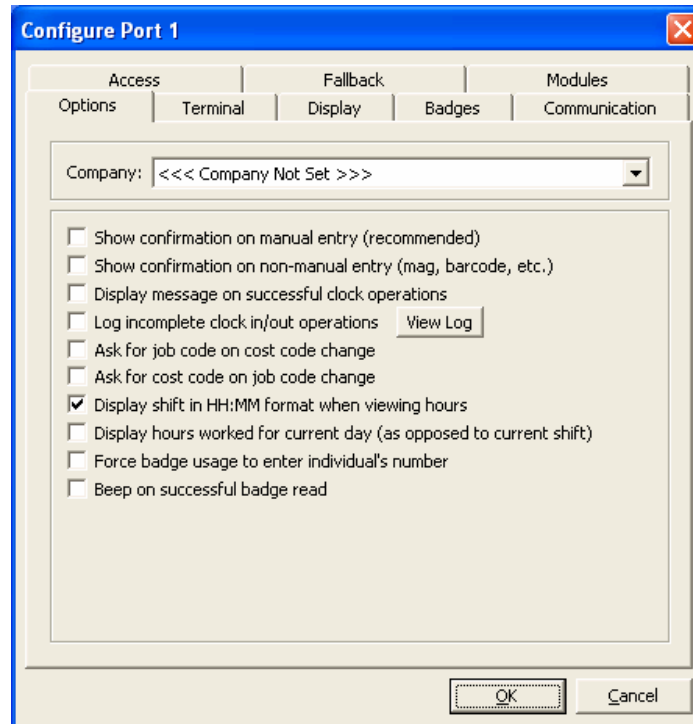
2. To access a port for configuration purposes, select it from the table by clicking it to highlight it, and then press the **Configure** button (this button will not become enabled until a port has been selected from the list).



To configure a port for use with a serial RDT, select one of the ports labeled COMx, to configure an Ethernet port, select a port labeled ETHx.

3.4.2. The **Options** Tab

This tab includes several actions the RDT can perform. Begin by selecting the correct company name from the drop-down box for the Company field (if you have multiple companies installed).

The screenshot shows a window titled "Configure Port 1" with a blue title bar and a close button. Inside, there are two rows of tabs. The first row has "Access", "Fallback", and "Modules". The second row has "Options", "Terminal", "Display", "Badges", and "Communication". The "Options" tab is selected. Below the tabs is a "Company:" label followed by a drop-down menu showing "<<< Company Not Set >>>". Below this is a list of ten options, each with a checkbox. The first option, "Show confirmation on manual entry (recommended)", is checked. The other options are unchecked. To the right of the "Log incomplete clock in/out operations" option is a "View Log" button. At the bottom right of the dialog are "OK" and "Cancel" buttons.

Each option on this tab provides the following service if enabled:

Company - The company option allows you to specify which company this port/RDT will use. This allows you to specify a different company for each port/RDT>

Show confirmation on manual entry - If checked, the employee will be required to confirm his/her identity when entering their employee number manually through the use of the keypad on the RDT. The RDT screen will display the employee's ID number and ask that they accept the number.



This option is recommended.

Show confirmation on non-manual entry (magnetic, barcode, etc.) – If checked, the employee will be required to confirm his/her identity when using a non-manually entered employee number to clock in (i.e. Badge swipe, biometrics identification, et cetera). The RDT screen will display the employee's ID number and ask that they accept the number.



By default, badge swipes do not require confirmation of identity because it is assumed that the person holding the badge is the person performing the clock operation.

Display message on successful clock operations – if checked, the RDT screen will display “Clock In Successful” or “Clock Out Successful” when an employee successfully completes a clocking operation.

Log incomplete clock in/out operations – if checked, all failures to clock in/out will be logged to a file. In addition, if a clocking operation is started but not completed, this will be logged to this file. The log file is created in the root directory of the local C: drive and is named RMT<x>.LOG where <x> is the port where the RDT is active. Ethernet ports are numbered beginning with 1000. If you do not see the file in the specified location, you can easily view the file by clicking on the View Log Button.

View Log button – This button allows you to view the log of incomplete clock in/out operations directly from the WinRemote software.

Ask for job code on cost code change – **only applies to systems with the Job Costing Module.** If checked, the system will prompt the employee for a new job code when they perform a cost code change at the RDT. This is helpful if you routinely perform job and cost code changes at the same time.

Ask for cost code on job code change – **only applies to systems with the Job Costing Module.** If checked, the system will prompt the employee for a new cost code when they perform a job code change at the RDT. This is helpful if you routinely perform job and cost code changes at the same time.

Display shift in HH:MM format when viewing hours – if checked, when an employee views his/her hours worked from the RDT the hours will display in hours and minutes rather than hours and hundredths (ex. One and a half hours would display as 1:30 rather than 1.50).

Display hours worked for current day (as opposed to current shift) – if checked, when an employee views his/her hours worked at the RDT, the hours for the current day will display (default is to display hours for the current shift).

Force badge usage to enter individual's number – if checked, employees will be forced to use a badge or other non-manual method for clocking operations. They will not be able to clock in/out by keying in their employee ID number from the keypad.

Beep on successful badge read – if checked, the system beeps if the clocking operation is successful (the number of beeps to perform is set on the Terminal tab in the next section).

3.4.3. The **Terminal** Tab

This tab contains additional settings related to operation of RDTs utilizing this port.

The screenshot shows the 'Configure Port 1' dialog box with the 'Terminal' tab selected. The dialog has a title bar with a close button. Below the title bar are three tabs: 'Access', 'Fallback', and 'Modules'. Under 'Access', there are sub-tabs: 'Options', 'Terminal' (selected), 'Display', 'Badges', and 'Communication'. The 'Terminal' tab contains a 'Description:' text box. Below it are two columns of checkboxes: 'Display system time' (checked), 'Display only minutes in time' (unchecked), 'Auto-start this port' (unchecked), 'Allow badge test using 00' (unchecked), 'Allow id terminal using 11' (checked), 'Beep when a key is pressed' (unchecked), 'Bar code reader attached' (checked), and 'Use new command set' (checked). Below these is the 'Operation Status' section with 'Success' and 'Failure' settings, each with a numeric value (0), a 'beeps' label, a 'Tone' dropdown (4 and 1-Low respectively), and an 'LED' setting (3.0 seconds (0.0-5.0)). At the bottom is the 'QuickPunch' section with 'Enable QuickPunch' (unchecked) and 'Ignore QP within how many seconds of another punch' (60). 'OK' and 'Cancel' buttons are at the bottom right.

Description Text Box – this box is used to provide a more descriptive name for the RDTs utilizing this port in the WinRemote table on the main WinRemote screen (ex: might input “Warehouse” if the RDT is located in the warehouse and “Yard” for an RDT located in the lumber yard).

Display system time – if checked, the RDT will display the system time on its LCD screen while it is idle.

Auto-start this port – if checked, the system will automatically start this port when the WinRemote program is activated. You will not have to click on the Start button for this port to start communication to the RDT.



If you are running the WinRemote application as a service, the port should be configured to auto-start.

Allow badge test using 00 – if checked, this will allow you to test your bar code, proximity or magnetic badges from the RDT device. Pressing the “0” key twice when the system is idle, and at its main menu will put the RDT into a badge-testing mode. This mode allows you to determine if the RDT is reading the badge.

Allow id terminal using 11 – if checked, this will allow you to get information about an RDTs connection from the device itself. Pressing the “1” key twice when the system is idle and at its main menu will produce a display containing where it is connected (port), what computer is controlling it, and the running time of that RDT.

Beep when a key is pressed – if checked, the RDT will beep each time one of its keys is pressed.

Bar code reader attached – this option should be checked if you are using an RDT equipped with an internal or external bar code reader.

Use new command set – this option should be checked if you are using an RDT purchased after 1/1/2000 as these RDTs have a broader command set (turning off the cursor, sizing the cursor, etc.). If you enable this and your terminal does not support it, stray characters may display on the RDTs display screen.

Number of beeps on successful clock operation: Input a number representing how many times you want the RDT to beep upon a successful clock operation.

Number of beeps on failed clock operation: Input a number representing how many times you want the RDT to beep upon a failed clock operation.

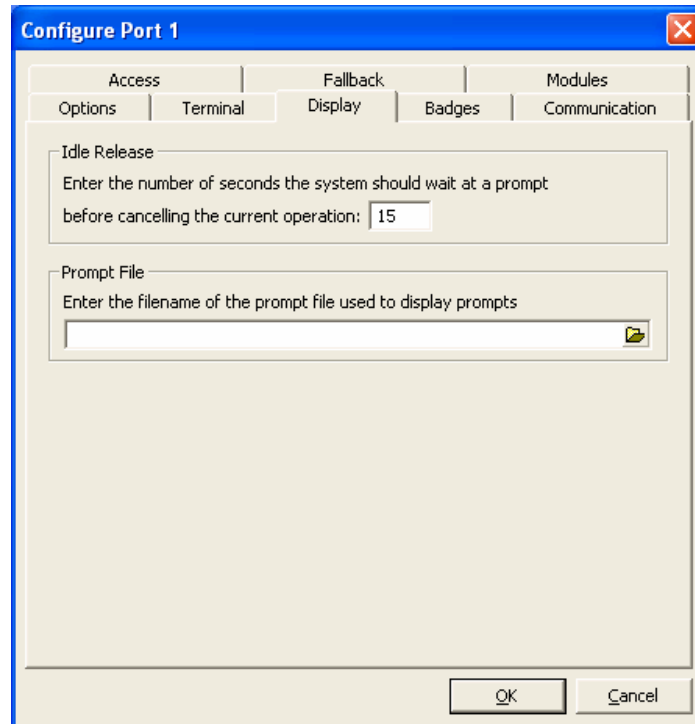
Enable QuickPunch – **only applies to RDTs equipped with a card swipe reader.** If checked, employees will not have to press any buttons during clock in/out operations but simply swipe their card (called a QuickPunch). If the employee is currently clocked in and swipes their card, they will be clocked out and vice versa.

During a QuickPunch operation, in or out, the employee may still be required to enter information such as job code, cost code or tracked fields – depending on your system configuration. For example, if an employee is clocked in using a job code which is configured to require the input of “pieces” upon clock out, the employee will be prompted to input the number of pieces.

Ignore QP within how many seconds of another punch – if checked, the RDT will not allow a QuickPunch operation within X seconds after another punch operation by that particular employee.

3.4.4. The **Display** Tab

This tab controls the Idle Timeout and designates which Prompt File will be used for the selected port/RDT. (Prompt Files were discussed in Section 3.1.2 of this manual).



The screenshot shows a window titled "Configure Port 1" with a close button in the top right corner. The window has a tabbed interface with the following tabs: Access, Fallback, Modules, Options, Terminal, Display (selected), Badges, and Communication. The "Display" tab is active, showing two sections: "Idle Release" and "Prompt File". The "Idle Release" section contains the text "Enter the number of seconds the system should wait at a prompt before cancelling the current operation:" followed by a text box containing the number "15". The "Prompt File" section contains the text "Enter the filename of the prompt file used to display prompts" followed by a text box and a file selection icon (a folder with a magnifying glass). At the bottom of the window are "OK" and "Cancel" buttons.

Idle Release – input the number of seconds you want the terminal to wait for user input before canceling the transaction in its entirety. For example, if someone begins to clock in then walks away from the RDT, the RDT will wait for 15 seconds before resetting itself to an idle/ready state.

Prompt File – as previously mentioned, RDT screen prompts can be customized to meet your needs by using Prompt Files (see Section 3.1.2 of this guide). Once created, Prompt Files are assigned to a particular RDT on this tab. To designate which Prompt File to use for a particular port/RDT, select it from the available files by clicking on the File Open icon to the right of the Prompt File input field.



This is a useful feature for a company with employees who do not speak fluent English. An alternate prompt file could be created, in Spanish for example, and this file could be used at a specific RDT in place of the original prompt file.

3.4.5. The **Badges** Tab

The Badges Tab controls how the characters on magnetic and barcode badges are read by the RDT. You can use badges for entering six types of data: Employee ID, Job Code, Cost Code, Tracked Entry field, Password and Manager.



The settings on this tab are used to instruct the system on how to read your badges and the information on them.

Begin by selecting which field of data (Employee Id number, Job Code, et cetera) you want to configure by selecting it from the Entry Location drop down box. Next, enable the Badge Parsing rules that apply to this specific data on the badge.



Badges may include more than one of these fields of data in the magnetic or barcode string. For example, a badge may include the Job Code and Tracked Field designation or possibly the Employee ID number and Password.

Use all characters in badge – if checked, the entire badge will be used as the input for this field. If the length of data on the badge exceeds the length of the field in TimeClock Plus, the data will be truncated to the allowed length. For example, if you have a badge containing 20 characters and you swipe it when asked to enter an employee ID number, only the first 10 characters will be used (this is the field length for employee ID number in TimeClock Plus).

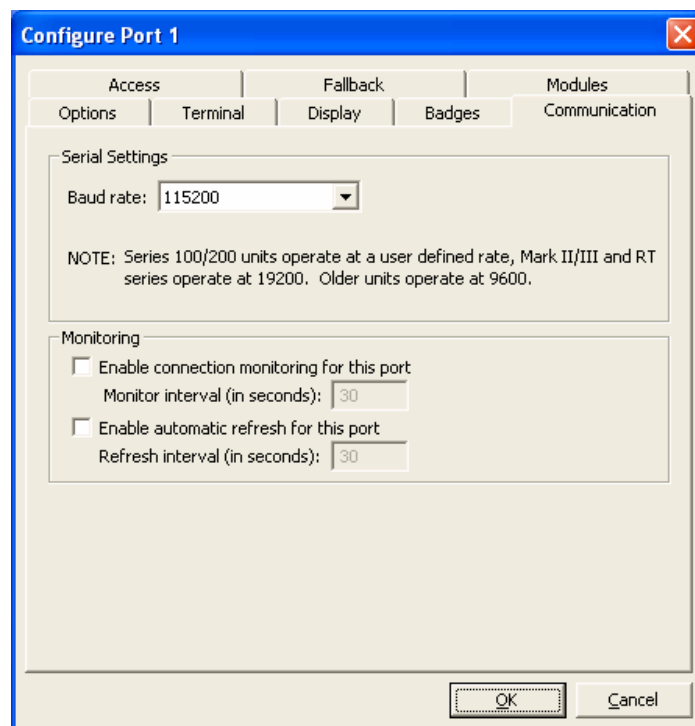
Use portion of badge – if checked, you can designate which of the characters on a badge will be read. For example, if you have a student ID that contains the student's birthday followed by their student ID number, you can tell the system to begin reading characters at the 9th position (after the student's birthday) and ending at the 18th position (assuming their ID number can be found from position 9 – 18).

Use last characters in badge – if checked, you designate how many of the last characters in the badge to read for this specific field. For example, if your existing badges contain varying lengths of data, but the last 10 characters always contain the employee ID number, you would enter 10 in this field.

Proximity Parsing – **only applies to RDTs equipped with a proximity reader**. If using a proximity reader you are required to select the appropriate translation method from the drop-down list on this field. Parsing can be disabled or the system can be instructed to perform translation of the proximity badge prior to or after badge parsing.

3.4.6. The **Communication** Tab

This tab is used to set communication methods for the RDT/port. This tab will either reflect "Serial Settings" or "Ethernet Settings" depending on which type of port you are configuring.



Serial Communications Configuration – the Professional and Mark II Series RDTs operate at a higher baud rate than the Standard RDTs. If you have one of these RDTs, or a biometric unit, set the baud rate to 19200 for this port. All standard RDTs operate at 9600 baud.

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If you are not sure what your Baud Rate should be set at for your RDT, set the Baud Rate option to Auto and the software will try to Automatically set it.

Monitoring – this section is used to establish monitoring rules for the RDT(s) connected to this port, as follows:

- **Enable connection monitoring for this port** – check to enable monitoring and input the interval (in seconds) at which the monitoring should be performed. This monitors the connection between the software and RDT every XX seconds.
- **Enable automatic refresh for this port** – check to enable automatic refresh and input the interval (in seconds) at which the refresh should be performed. This will refresh the LCD screen on the RDT after XX seconds.

The screenshot shows a 'Configure Ethernet ETH0' window with several tabs: Access, Fallback, Modules, Options, Terminal, Display, Badges, and Communication. The 'Access' tab is active. It contains two main sections: 'Ethernet Settings' and 'Monitoring'. In 'Ethernet Settings', the IP Address is set to 192.168.0.62, Port Number is 3001, and Startup delay (in milliseconds) is 1000. In the 'Monitoring' section, there are two checkboxes: 'Enable connection monitoring for this port' and 'Enable automatic refresh for this port', both of which are checked. Below each checkbox is a text field for the interval in seconds, both set to 30. At the bottom right of the window are 'OK' and 'Cancel' buttons.

Ethernet Communications Settings (only available on Ethernet ports) – Ethernet configuration requires the entry of an IP address and port number to enable the WinRemote system to locate the RDT on your network. The IP address and port number should be the same as the IP address and port number entered when the RDT was configured (see Section 3.4.6 of this guide).

Startup Delay – a startup delay is used to delay the startup of the WinRemote software on a port after the connection is made. This is useful in some situations where there is a

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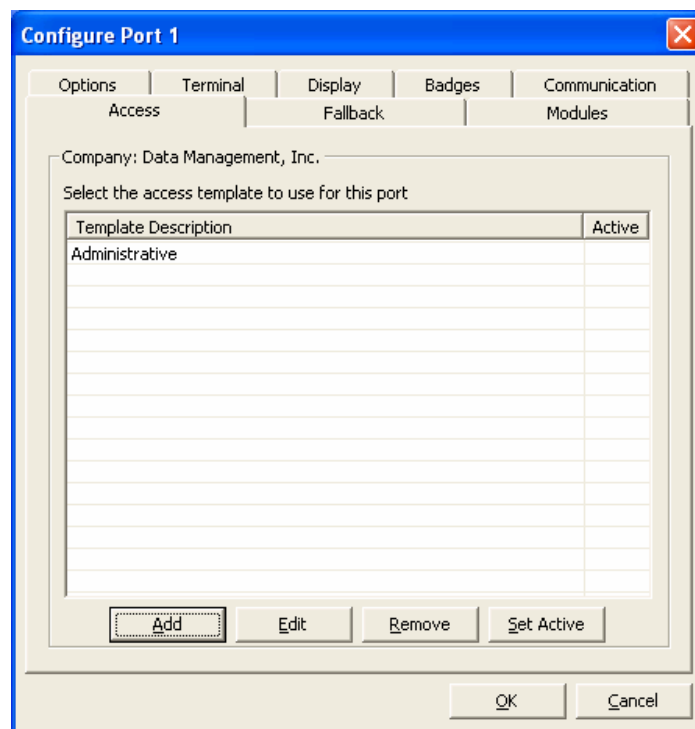
brief disruption in the connection after it is made. This value is entered in milliseconds where 1000 milliseconds = 1 second. For example, if you would like to pause the terminal for 2-1/2 seconds after it is first connected, you would enter 2500 in the startup delay.

3.4.7. The **Access** Tab

TimeClock Plus 4.2 allows you to restrict employee access to specific RDT(s) for clocking operations. This is useful when trying to manage employee clocking operations – for example, insuring that they clock in/out at an RDT closest to their work assignment area.

Access restrictions for employees can be set based on one of three criteria (they can be):

- ✓ Employee ID Number
- ✓ Classification
- ✓ Job Code



There are two steps to establishing access restrictions. First, a template must be created and secondly, the appropriate template must be “activated” for this port/RDT.

Begin by establishing an Access Template.

1. Click the **Add** button on the **Access** tab – the **Access Restriction Editor** screen will display.

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Access Restriction Editor

Restriction Template

Description: Administrative

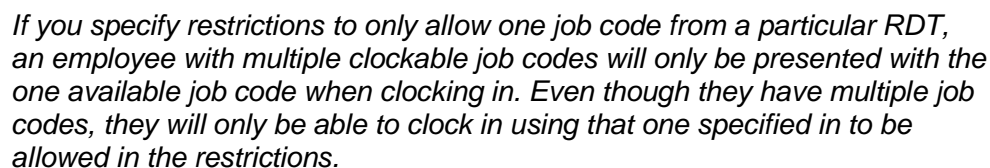
Restriction type: Individual's ID Number

Status: The selected items are allowed

Include	Id	Name	Class
<input checked="" type="checkbox"/>	1	Mick Smythe	0
<input checked="" type="checkbox"/>	2	Joe Ramos	0
<input checked="" type="checkbox"/>	3	Willy Smith	0
<input checked="" type="checkbox"/>	4	Willy Hernandez	0
<input type="checkbox"/>	5	Franco Potts	0
<input type="checkbox"/>	6	Len Lamos	0
<input type="checkbox"/>	7	Joseph Kelly	0
<input type="checkbox"/>	8	Arnold Jacobson	0
<input checked="" type="checkbox"/>	9	Curt Lane	0
<input type="checkbox"/>	10	Carol Smith	0
<input type="checkbox"/>	11	Tom Jacobs	0
<input type="checkbox"/>	12	George Kelly	0
<input type="checkbox"/>	13	Jack Kyne	0
<input checked="" type="checkbox"/>	14	Mark Kyne	0
<input type="checkbox"/>	15	Mike Jacobson	0
<input type="checkbox"/>	16	Arnold Uma	0

OK Cancel

2. Enter a Description for this template (37 characters, alphanumeric) in the input box. This description will serve as a name for the Restriction and display in the template table.
3. From the Restriction Type drop-down box, select whether the restriction is based on Employee Id number, Classification Code or Job Code (your selection determines what information will display in the access table of this screen).
4. From the Status drop-down box, select whether the Restriction Type in the table is allowed, is not allowed, or has no restrictions associated with them.
5. In the access table click on those line items you want included in this access rule. A red check mark will display on the "included" line items. For example, in the following screen we have defined a restriction template titled "Production Floor – Rear" (designating the physical location of the RDT connected to this port – at the rear of the production area). We have defined the access to prevent the use of any job code other than 300 at this RDT.
6. Restrictions can be set up to restrict by employee number, employee classification (class), and by job code. You can set restrictions to either allow or not allow access to RDT based upon what you are restricting. For example, you can allow only certain employee numbers or classifications to perform a clock operation from this RDT. You can also restrict by job code, so that no one can clock in using a particular job code or group of job codes from this RDT. On the other hand, you can allow only one particular job code to be able to perform a clock operation from this RDT.



Access Restriction Editor

Restriction Template

Description:

Restriction type: ▼

Status: ▼

Include	Job Code	Description
	100	Administrative
	200	Engineering
✓	300	Assembly I
	400	Assembly II
✓	1000	Sick
✓	2000	Vacation

OK Cancel

3.4.8. The **Modules** Tab

The Modules tab is where you configure modules for use. Modules that can be used with the Remote Data Terminal are the Digital Output, Handscanner, or Fingerprint modules. You can highlight the module and configure it for use by hitting the **SETUP** button. You may refer to the documentation associated with the module for configuring that specific module.

NOW – Go to Section 10 and test the RDT devices.

SECTION IV: INITIAL SETUP OF THE TIMECLOCK PLUS MANAGER

Once the TimeClock Plus software and modules have been installed on your computer, and any RDT devices connected, you must set up the TimeClock Plus application before your initial use. There are up to four steps to set up the TimeClock Plus application, depending on how you will use the software:

1. Initialize/Setup of the TimeClock Manager (required for all installations)
2. Setup of the On-Screen TimeClock (if employees will clock in/out via this method instead of a Remote Data Terminal (RDT))
3. Setup of the TimeClock Scheduler (though set up of schedules is optional, they are required for attendance monitoring functions within the TimeClock Manager)
4. Setup of any modules purchased

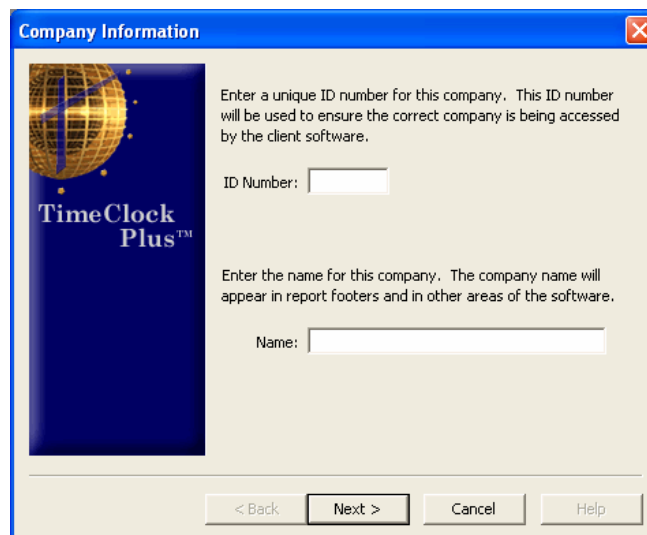
This section will walk you through the initialization and setup procedure of the TimeClock Manager. Subsequent sections of this user guide will present setup procedures for the other parts of the application (On-Screen TimeClock and Scheduler).

4. Initial Setup of TimeClock Manager

4.1. Setting up the company

The first step in initializing TimeClock Plus is the setup of your company.

1. Begin the company set up by launching TimeClock Manager from the Windows Start Menu.
2. The **Company Info** screen will appear. When prompted enter the Company I.D. Number and Company Name, click **Next** when this is complete.



3. You will then be asked to enter an **Initial Workweek**. The Initial Workweek is the first day of the first week for which you will be using TimeClock Plus to gather punches.

Note!

Regardless of the type of pay period(s) you use, TimeClock Plus calculates overtime on a weekly basis. For instance, if your pay week begins on Sunday, and if you will begin collecting punches on Wednesday, you would enter the Sunday prior to the Wednesday in the Period Base Date as MM/DD/YY.

4. To complete the company setup, click **Finish**. After reviewing the information you have entered, click **Yes** to accept it and complete the company setup.
5. The system then returns you to the **Select Company** dialog box. To select the company name you just created, double click it from the **Select Company** list.
6. The **Supervisor Login** Screen will display. If this is a new company, no password will be configured yet, so you can log in as Supervisor without a password. If you converted data or already entered a password you will need to enter the correct Supervisor password.
7. The system will ask if you would like to run the Quick Setup Wizard now. Press **Yes** to begin the Quick Setup, or **No** if you would like to exit the setup until a later date.

QUICK START – NEXT STEP:

Once your company has been created you must establish the codes and rules the TimeClock Plus application will use when collecting and managing punch activity. The Quick Setup Wizard walks you through setting up all REQUIRED codes and rules.

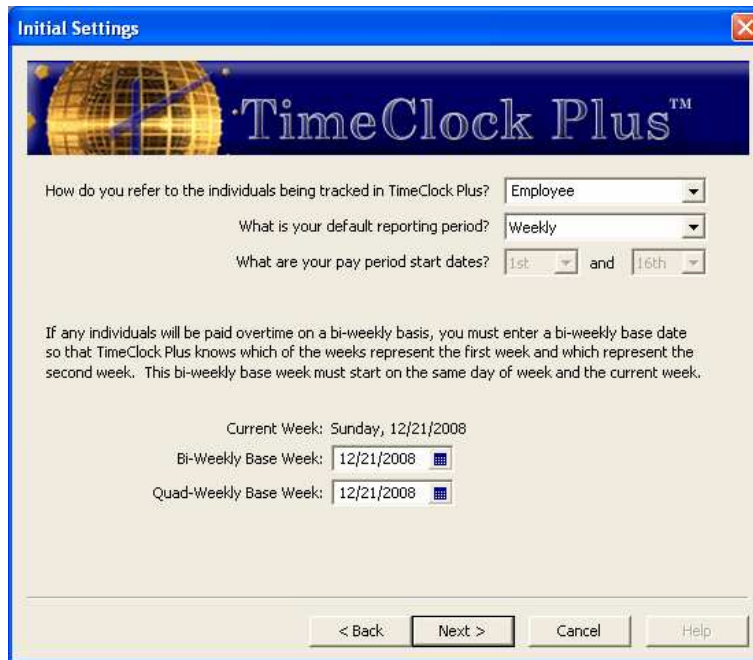
4.2. The Quick Setup Wizard

When you launch TimeClock Manager for the first time, you will be prompted if you would like to launch the **Quick Setup Wizard** to assist with you the initial setup. If you choose to run the Quick Setup Wizard (proceed through each of the wizard screens by pressing **Next**). It is not a requirement that the **Quick Setup Wizard** be initiated because you may run the Quick Setup Wizard at any time by choose it from the File Menu. Also all the settings addressed in the wizard are available from various menus in the TimeClock Manager.

Note!

The Quick Setup Wizard is only available if you are logged in as SUPERVISOR.

4.2.1. Initial Settings



The screenshot shows the 'Initial Settings' window for TimeClock Plus. The window has a blue title bar with the text 'Initial Settings' and a close button. Below the title bar is a banner with a globe icon and the text 'TimeClock Plus™'. The main area contains three settings questions, each with a dropdown menu:

- How do you refer to the individuals being tracked in TimeClock Plus? (Dropdown: Employee)
- What is your default reporting period? (Dropdown: Weekly)
- What are your pay period start dates? (Dropdowns: 1st and 16th)

Below these settings is a paragraph of text: 'If any individuals will be paid overtime on a bi-weekly basis, you must enter a bi-weekly base date so that TimeClock Plus knows which of the weeks represent the first week and which represent the second week. This bi-weekly base week must start on the same day of week and the current week.'

Below the text are three date fields:

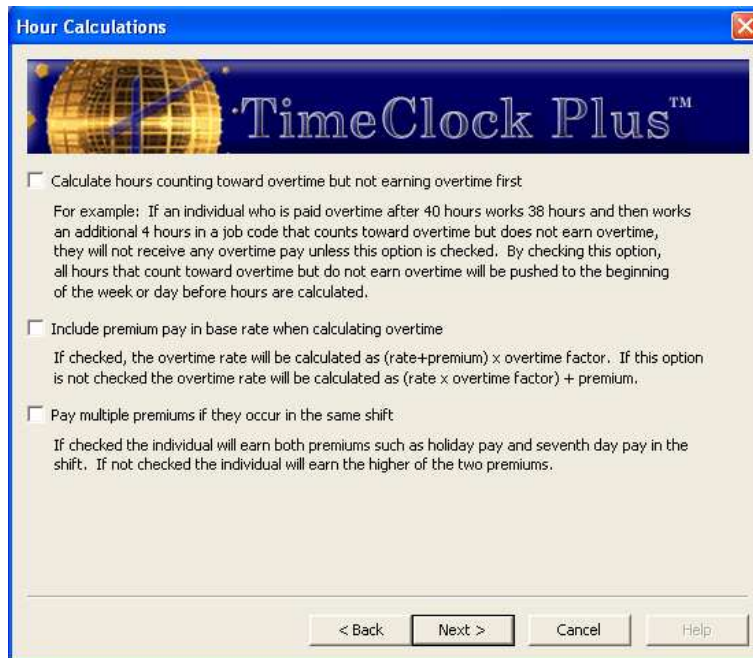
- Current Week: Sunday, 12/21/2008
- Bi-Weekly Base Week: 12/21/2008 (with a calendar icon)
- Quad-Weekly Base Week: 12/21/2008 (with a calendar icon)

At the bottom of the window are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

This screen requires the completion of three settings used throughout the system.

1. How do you refer to the individuals being tracking in TimeClock Plus? Enter the title you use to refer to the individuals who will be clocking in and out via TimeClock Plus. The title established here will display throughout the system when these individuals are referenced and can be changed at a later time. For example, Student.
2. What is your default reporting period? Select the frequency for which payroll reports are normally produced (Weekly, Bi-Weekly, Semi-Monthly and Monthly). This sets the default reporting period for reports. This is used in the automatic calculation of payroll dates for reports and does NOT affect how hours are calculated.
3. What are your pay period start dates? Specify the start dates for up to two pay periods per month. This is also used in the calculation of payroll dates for reporting and does NOT affect how hours are calculated.

4.2.2. Hour Calculations

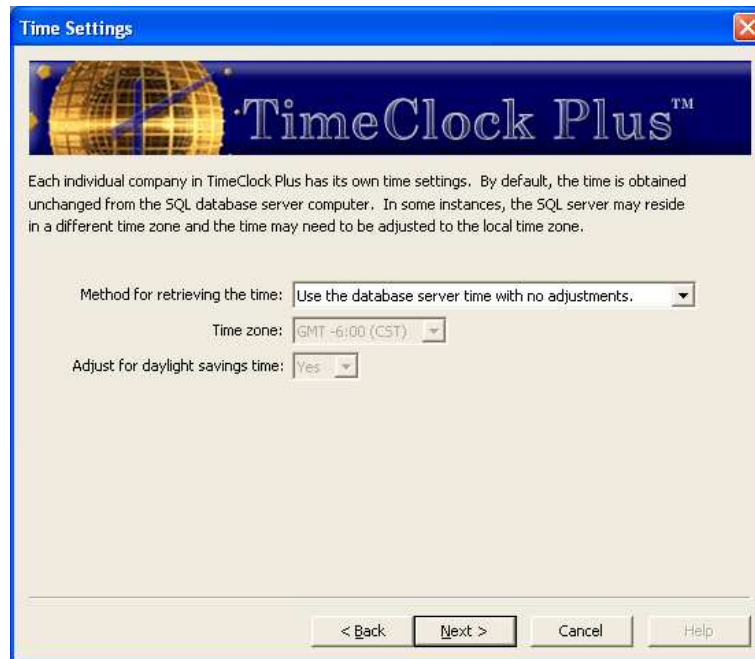


The Hour Calculations screen is used to establish rules specific to overtime and premiums when calculating hours during a specific period.

1. Calculate hours counting toward overtime but not earning overtime first – If checked, the system will push all non-overtime hours to the beginning of the day or week, before overtime is calculated. If not checked, all hours will be counted in relation to overtime on the day and time that they are worked. For example, with this option checked and you have vacation hours at the end of the week, the vacation hours will be calculated first, to help reach overtime faster.
2. Include premium pay in base rate when calculating overtime – If checked, the pay rate for overtime is calculated by adding the employee's premium pay to their base rate before applying the overtime factor. If this option is not checked, the overtime rate is calculated by multiplying the base rate times the overtime factor, then adding the premium pay to that figure.
3. Pay multiple premiums if they occur in the same shift – If this option is checked, employees will be paid all premiums for which they are eligible for a single shift. If it is not checked, then the individual will earn the highest of the premiums but not both. This allows them to get paid a premium for Holidays as well as a premium for the 7th day worked.

4.2.3. Time Settings

This screen is used to configure how the time on client workstations and/or Remote Data Terminals will synchronize with the time on the TimeClock Plus database server.



For previous versions of TimeClock Plus, this was referred to as “TimeServer”. In 4.2, time settings are handled on this screen and no configuration at the client is required (as in previous versions).

1. Method for retrieving the time – Select the appropriate option from the drop down list:
 - a) Use the database server time with no adjustments – If selected, client workstations and RDTs will pull their time from your database server with no adjustments made for time zones. This setting should be selected if all client workstations and RDTs are located in the same time zone as the database server.
 - b) Use the database server time adjusted to time zone – If selected, client workstations and RDTs will pull their time from the database server and a time zone adjustment will be applied. This setting should be selected if client workstations and RDTs are NOT located in the same time zone as the database server. This option should be utilized for an organization collecting time in a distributed environment across multiple time zones. The system will automatically adjust in/out punches based on the actual time zone of the client machine in which work is being performed (must set Time zone in the next section).



The 'Use the database server time adjusted to time zone' option is not available if you are using SQL Server 7.0.

- c) Use the local system time – If selected, each client will pull time from its own clock and not look to the database server. NOTE: This option is not recommended because if an employee changes the system time at point of clock in, it will change the recorded time.
2. Time Zone – This option becomes available only if you configure the system to “Use the database server time adjusted to time zone” (see above description). If the field is available, input the time zone in which your TimeClock Plus clients will be located.
3. Adjust for daylight savings time – Select “Yes” if you want the TimeClock system to adjust for daylight savings time (rather than relying on the database server to adjust its time).

4.2.4. Field Names

Field Names

TimeClock Plus™

TimeClock Plus allows entry of up to three tracked fields per shift segment. These fields can be individually named according to how you will use them. In addition, the number of decimal places for each field can be set to allow for entering dollar amounts (i.e. tips) or whole numbers (i.e. parts completed).

Tracked field 1 name:	Track1	Decimal places:	0
Tracked field 2 name:	Track2	Decimal places:	0
Tracked field 3 name:	Track3	Decimal places:	0

< Back Next > Cancel Help

Tracked fields are used in TimeClock Plus to collect information from employees as they clock in and/or out of a shift, such as “tips” in a restaurant or “pieces” in a production environment.

To set up a tracked field, enter its name in one of the three Tracked Field Name fields. Choose the decimals field to enter the number of decimal places you wish to restrict the input for this tab to (up to 4 decimal places). For example, a restaurant might set the name to Tips and the decimals to 2 in order to collect dollars and cents.

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In the next section of the Quick Setup Wizard, Tracked Fields are assigned to individual Job Codes.

4.2.5. Job Codes

Job Code	Description
100	Administrative
200	Engineering
300	Assembly I
400	Assembly II
1000	Sick
2000	Vacation

Employee time is captured for each employee by Employee ID number and Job Code number (every employee must have at least one clockable job code assigned to them).

Job Codes can also be used to capture employee time by Department or Job Task in order to provide real-time tracking of personnel costs at a level meaningful for your operation. Examples of job codes are:

- ✓ A “General” job code might be used for all employees if no departmental or task level tracking is required
- ✓ Department-oriented job codes such as Administrative, Shipping, or Assembly I might be used
- ✓ Task-oriented job codes such as Mechanic, Welder, or Driver might be used



All job codes do not have to be added during the Quick Setup Wizard. They can be added via the TimeClock Manager at any time; however, job codes must be available for assignment to individual employees during the employee setup process (see Section 4.3.3). To add a job code after the

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Quick Setup process, select "Configuration" then "Master Job Code List" from the TimeClock Manager Main Menu.



Job Codes can also be imported from a file produced by another application (your previous timekeeping system for example). Consider importing Job Codes if you will be using more than 20 job codes. See Section 7.3 of this manual for information on this import process.

4.2.5.1. To add a job code (clockable or non-clockable):

1. Click the **Add** button on the **Job Codes** screen. The **Edit Job Code** screen will appear with several different tabs for settings.



There are only 4 informational items that have to be considered when setting up job codes: Job Code number, Description/Name, a check box to indicate if it is "Active" and a check box to indicate if the time collected via this Job Code will be "clockable".

4.2.5.2. **Information** Tab: This tab is used to define a job code and set its defaults.

The screenshot shows the 'Edit Job Code' dialog box with the 'Information' tab selected. The dialog has a title bar with a close button. Below the title bar are tabs: 'Information', 'Breaks', 'Break Rounding', 'Segment Minimums', 'Auto Out', and 'Custom'. The 'Information' tab contains the following fields and controls:

- Job code number:** A text box containing '100'.
- Active:** A checked checkbox.
- Description:** A text box containing 'Administrative'.
- Exports as:** An empty text box.
- Group:** A dropdown menu.
- Job Defaults:** A section containing:
 - Code is clockable:** A checked checkbox.
 - Hours worked earn overtime:** A checked checkbox.
 - Hours worked count toward overtime:** A checked checkbox.
 - Default rate:** A text box containing '0.00'.
 - Require entry of "Track1":** A dropdown menu set to 'Disabled'.
 - Require entry of "Track2":** A dropdown menu set to 'Disabled'.
 - Require entry of "Track3":** A dropdown menu set to 'Disabled'.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

2. Where prompted, input the Job Code number (up to 10 characters in length, numeric only) and its Description (or name; up to 30 characters in length, alphanumeric).
3. You should also mark if the job code is active by placing a mark in the Active check box. This box is checked by default.

4. Code is clockable – if checked, this designates that the job code can be used for clock in and out purposes (vs. a sick or vacation job code which would only be input via editing of a time record).
5. The Export As field may be used if you will be exporting data to another application, such as payroll software. However, this field can be left blank during the Quick Setup Wizard and edited before exporting begins via the Master Job Cost List (refer to Section 4.2.5 on exporting the Job Code List).
6. When reporting, the Group field is used to group job codes together for summarization. This is not a required field and can also be added at a later date via the Master Job Code List. These are the groups used to sort and group when using the Job Code Group Detail and Job Code Group Summary reports.



These settings are default settings and can be overridden per employee.



Each employee is required to have at least one clockable job code to be able to perform a clock operation.

7. Hours worked earn overtime - if checked, any hours recorded to this job code that are worked past the overtime mark, earn overtime. For example, if an employee is set to reach overtime at 40 hours, all hours worked over 40 will be considered overtime.
8. Hours worked count toward overtime - if checked all hours worked under this job code will count towards the overtime mark.
9. Require entry of cost code when using this job code - if checked, the system will require the entry of a Cost Code each time the employee clocks in using this Job Code (only valid if the optional Job Costing module is being used).
10. Require entry of tracked fields 1, 2 and 3 - if checked (enabled) the system will require input of a value for the designated Tracked Field at clock in or out, both in and out, or by a manager/user only (depending on how the Tracked Field is configured via Configuration, Preferences, Defaults, Tracked Fields).

4.2.5.3. Breaks Tab: You can configure up from 0 – 3 automatic break deductions for a job code. The automatic break deduction will be deducted from the end of the shift. These automatic deductions are only taken if the specified hours have been worked. For example, the system can automatically deduct a 30 minute break for shifts that are longer than 4 hours. Automatic deductions are deducted for straight segments containing only one job code. If an individual clocks in and out for break the clocked break settings will be used. Also, indicate whether breaks for this job code are paid or non-paid. An example of this is that you can specify a morning break to be paid while a lunch break is not paid. If the morning break is set to paid, you can specify if the break is paid or not if it exceeds XX minutes. You can also specify how many minutes, XX of that break are paid.

Edit Job Code

Information | **Breaks** | Break Rounding | Segment Minimums | Auto Out | Custom

Automatic

Deduct minutes for shifts above or equal hours.

Deduct minutes for shifts above or equal hours.

Deduct minutes for shifts above or equal hours.

Clocked Breaks

Break type:

When an individual clocks out for the specified break type, the break is:

OK Cancel Help

4.2.5.4. Break Rounding Tab: This tab allows you to specify the rules for break rounding. There are two options, accept company-wide settings for minimums and rounding (configured in TimeClock Manager Defaults), or establish settings specifically for this job code.

Edit Job Code

Information | Breaks | Break Rounding | Segment Minimums | Auto Out | Custom

Minimums and Rounding

Break type: Break

☐ Use company wide settings for minimums and rounding
☒ Use the following settings for this job code

☒ Enforce minimum break length of 15 minutes.

☒ Round breaks to nearest 5 minutes.

First Segment: Round up at 3 minutes. (0=Disable)

Other Segments: Round up at 3 minutes. (0=Disable)

NOTE: A segment refers to the period of time that you are rounding to. For example, if you round to the nearest 20 minutes, segment one would be the first 20 minutes and segment two would be the second 20 minutes, etc.

OK Cancel Help

1. Begin by selecting the Break you wish to set up from the Break Type drop-down box.
2. Next, enable whether this break will use company wide settings (configured in TimeClock Manager Defaults), or have its own rules established for minimums and rounding by checking the appropriate box.
3. If Use the following settings for this job code is checked, the rest of the tab becomes enabled with additional options for this break type for this job code.
 - a) Enforce minimum break length of X minutes – if checked, when employees clock out with this break code, for this job code, they will be forced to take a minimum break of X minutes.
 - b) Round breaks to nearest X minutes – if checked, the break will automatically be rounded to the nearest X minutes rounding up after X minutes.

4.2.5.5. Segment Minimums Tab: This tab allows you to specify a minimum length of time that an employee will be credited for a segment or shift utilizing this Job code. For example, a company might utilize a Job Code titled “Team Meeting” for a standing weekly meeting that all bus drivers attend. An agreement with the drivers might state that no matter how long this meeting actually lasts, all

attendees will be credited for a minimum of 2 hours, or 2:00. For this example, the Enable segment minimum for this job code field would be enabled and 2:00 would be input to the Minimum segment length field.



If they clock out early, the system still gives them 2 hours. If they go over 2 hours, the system will record the actual time that they clocked out.



When using segment minimums the time in and time out values for the shift remain unchanged but the total hours reflect the segment minimum. For example, a shift might be from 7:00 AM to 7:15 AM and show 1 hour worked.

Edit Job Code

Information | Breaks | Break Rounding | **Segment Minimums** | Auto Out | Custom

☒ Enable segment minimum for this job code

A segment refers to a matched in/out section of a full shift. This minimum can be set to ensure that an individual gets a minimum number of hours when clocking in to this job code. For example, if this job code is used for on-call support, the individual can be paid a minimum of X hours when they clock in to the support job code. If the individual exceeds X hours they will be paid their exact hours.

Note that segment minimums are processed before automatic deductions so deductions may occur if the minimum exceeds the deduction threshold.

Minimum segment length: (i.e. 4.5 or 4:30)

OK Cancel Help

4.2.5.6. Auto Out Tab: A job code can be configured to automatically clock out an employee with the specified amount of hours. For example, if an employee clocks in on a Job Code and then they leave the office, you can configure the system to automatically clock them out for X hours. You enable this by editing

their Job Code, and enabling Auto Out for that specific Job Code and assigning it X hours.

The screenshot shows a Windows-style dialog box titled "Edit Job Code" with a blue title bar and a close button (X) in the top right corner. Below the title bar is a tabbed interface with six tabs: "Information", "Breaks", "Break Rounding", "Segment Minimums", "Auto Out", and "Custom". The "Auto Out" tab is currently selected. Inside the dialog, there is a checkbox labeled "Enable automatic clock out for this job code." which is checked. Below this checkbox is a text box containing the text: "When an individual clocks in under this job code, the shift will automatically be closed and show a set number of hours from the clock in time. For example, if you pay two hours for meetings attended, create a meeting job code that auto clocks out after two hours. The individual will only need to clock in for the meeting and they will be given two hours." Below this text is a label "Number of hours to assign:" followed by a text input field containing "2:00" and a note "(i.e. 4.5 or 4:30)". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

4.2.5.7. Custom Fields Tab: The Custom Fields tab holds any user-defined fields that have been added to Job Code records.



This tab will be blank until Custom Fields have been established at the Job Code level.



The main idea behind Custom Fields is to track information that will be exported for importing into your payroll software. The Custom Fields that are used with payroll modules are added automatically when you load the payroll module. You can also manually add in Custom Fields for your own tracking if you would like.

[illegible]

Custom fields can be added in two ways:

1. Manually via Configuration > Preferences > Custom Fields.
2. Automatically during the addition of a TimeClock Plus optional module (such as a payroll export module).

You can now go back and make changes to information previously input with the “Quick Setup Wizard” or press the **Finish** button if no changes are required.

Next Step:

Register your TimeClock Plus system as this provides the following benefits:

- ✓ Access to the DMI Technical Support Team
- ✓ Notification of new products and enhancements

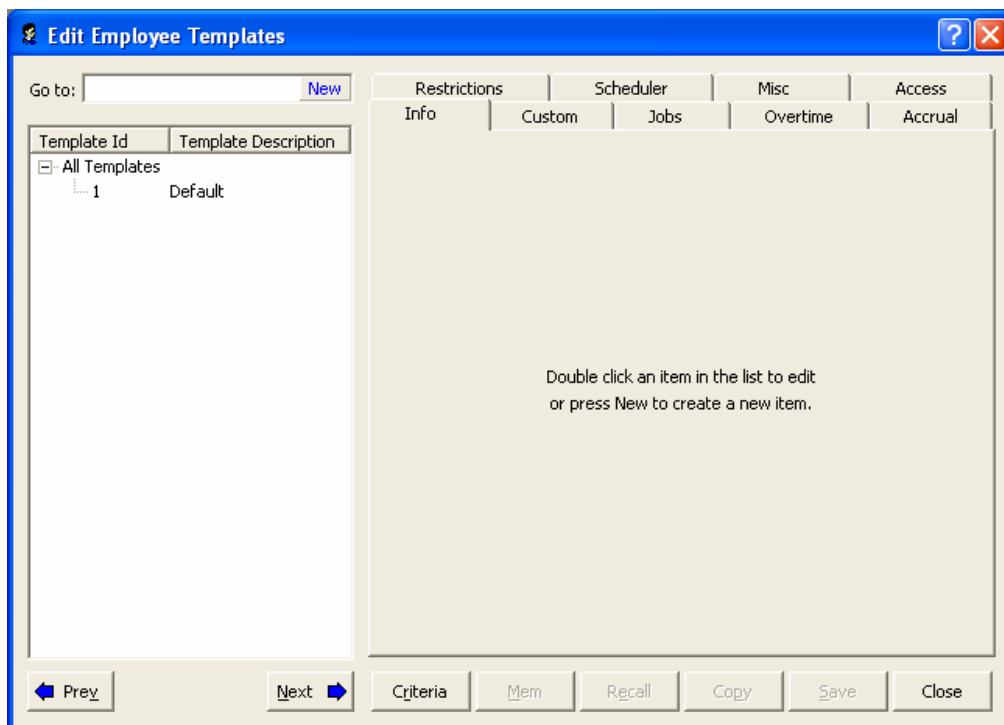
To register on-line via the internet, launch the AutoUpdate Utility via the Windows Start Menu and click the **Register** button. To fax your registration, use the Print option and fax the registration sheet to (325) 223-9104.

Before setting up employees and collecting punches, there are several other system-wide settings that should be considered and possibly set. The next section addresses these settings.

4.3. Employee Templates

Often a company will have several groups of employees with similar work and pay rules. For example, all administrative staff may work 9 – 5:00 and track their time to Job Code “100 – Administrative”, while warehouse employees may work a standard shift of 7:30 – 4:30 with numerous job codes they may track their time to throughout the day (common working hours but not common job codes). The TimeClock Plus system allows for the creation of “Templates” which can be assigned to different categories of employees to speed up their entry into the system (ex. Administrative Staff, Warehouse Staff, Drivers, etc.).

1. To create a Template, select “Employee” from the Main Menu then “Template”. The **Edit Employee Template** screen will display.



2. Press **New** to access the **Unnamed Template** screen and input the name for the new Template in the Template: field.
3. Complete any or all of the tabs for the template you are defining, as follows:

4.3.1. The **Info** Tab

The **Info** Tab is designed to contain all personal information for an employee such as name, address, phone number, et cetera. Most of these fields do not apply to a Template (they will be personalized for each employee) and should be left blank.

Classification – this is an optional, multi-purpose field (numeric only). It is designed for use in grouping employees for reporting, editing, and/or control purposes via the Criteria

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Function (see Section 4.5 for more information on Criteria). For example, if a company has multiple physical locations, employees at corporate headquarters might be given classification code “1” while employees in an out of state location might be given classification code “2”. Functions within the system, and reports, could then be filtered to only include employees in classification code “1”, etc.

Dept: - this is an optional field (alpha-numeric). This field may be populated to maintain the department that an employee is assigned to. Data can either be selected from the field's drop-down box, or entries can be added to the drop-down box on the fly by typing them into this field.

Badge: - This is an optional field (alpha-numeric). If you are using an RDT with a card reader or a Serial Scanner in conjunction with the On-Screen TimeClock you can assign a badge number to an employee.



In previous versions you would have had to make the employee number the card number. Now you can have an independent employee number from their badge assigned to them.

Export Code: - This is an optional field (alpha-numeric). If you will be exporting to a payroll software package and your TimeClock employee number is different from your code in the payroll software, you can enter your payroll software code in the Export Code field. When exporting data to import into your payroll software, if entered, this will be the employee identifier exported.

Network Id: - This is an optional field (alpha-numeric). This allows you to specify the network login information for a particular employee. This works in conjunction with the On-Screen TimeClock to determine the employee number. This option is further covered in section 8.1.2.

Individual is suspended (check box): - If this option is checked the employee is designated as being suspended. This is an option that can be filtered through Criteria.

4.3.2. The **Custom** Tab

This tab is used to input data to the Custom, or user-defined, employee fields in TimeClock Plus. Available custom fields will display in the "Field" column.

To input data for one of the Custom Fields, for this template, double click on the line item and type in your input to the "Value" column (or make a selection from the drop-down box displayed if this custom field was established as an Item-List type).

4.3.3. The **Jobs** Tab

The Jobs tab of the template is used to establish a default pay rate and all job codes effective for the template. A default pay rate may not apply to all employees to whom the template will be applied and this field can be left blank. Because at least one clockable job code is required for every employee, it is recommended that at one job code is added to the template's **Jobs** tab.

The screenshot shows the 'Edit Employee Templates - Default' window with the 'Jobs' tab selected. The window has a blue title bar and a standard Windows interface. On the left, there is a tree view under 'Go to: 1' with a 'New' button. The tree shows 'All Templates' expanded, with '1 Default' selected. The main area on the right is divided into several sections. At the top, there are tabs: 'Restrictions', 'Scheduler', 'Misc', 'Access', 'Info', 'Custom', 'Jobs' (selected), 'Overtime', and 'Accrual'. Below the tabs, there is a 'Default pay rate:' field set to '0.00'. Below that is a table with the following columns: 'Code', 'Description', 'Rate', 'Clockable', 'Earns Overtime', and 'Counts Toward Ovt'. The table is currently empty. At the bottom of the table area, there are 'Add', 'Edit', and 'Delete' buttons. To the right of these buttons are two checkboxes: 'Active only' and 'Use short titles'. At the very bottom of the window, there is a row of buttons: 'Prev', 'Next', 'Criteria', 'Mem', 'Recall', 'Copy', 'Save', and 'Cancel'.

Adding a Job Code to the Template

1. To Add a job code select **Add** and the Edit Job Code dialogue box will display with four tabs of data for completion.
2. Complete these tabs as follows:

4.3.3.1. Information Tab

This tab is used to select a Job Code to be added to the template and to define pay rates and calculations associated with it (if applicable).

The screenshot shows the 'Edit Job Code' dialog box with the 'Information' tab selected. The dialog has four tabs: 'Information', 'Tracked Fields', 'Custom', and 'Accruals'. In the 'Information' tab, there is a 'Job Code' field with the value '100' and a dropdown arrow to its right. To the right of the 'Job Code' field is a 'New Code' button. Below the 'Job Code' field is a 'Description' field with the value 'Administrative'. Below the 'Description' field is a section titled 'Pay Rates' with two radio buttons: 'Use individual's default rate' (selected) and 'Specify rate for this job code' (with a value of '0.00'). Below the 'Pay Rates' section is a section titled 'Calculations' with several checkboxes: 'Code is active (must also be active in Master Job Code List)' (checked), 'Code is clockable' (checked), 'Code counts toward overtime' (checked), 'Code earns overtime' (checked), 'Job is default job for individual' (unchecked), 'Force overtime 1 for this code' (unchecked), and 'Force overtime 2 for this code' (unchecked). At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

Job Code – Access the Job Code list by pressing the drop down box button to the right of the edit field. (Note: you can also add a new job code to the Master Job Code list from this screen by pressing the **New Code** button to the right of the Job Code field).

Description – once a job code is selected (or added to the Master Job Code list) the description field will populate

Pay Rates

Use default rate – if selected, the employee's default rate will be used (maintained on the Jobs tab in Employee, Add/Edit).

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Specify rate for this job code – if you do not want to use the default rate for this job code for an employee, select this item and input the employee's hourly wage for this job in the "Rate" field.

Calculations

Code is Active (must also be active in Master Job Code List) – if checked, this job code is "active" for this template.

Code is Clockable – if checked, an employee can clock in/out using this Job Code via On-Screen TimeClock or RDT device.

Code Counts Toward Overtime – some hours worked may count toward an employee's overtime but not actually earn overtime. This check box is used to specify this for a particular job code (Note: The next check box should not be enabled in order to specify this treatment of hours for this job code – uncheck the "Code earns overtime" box and this box then becomes available for entry).

Code Earns Overtime – if checked, hours worked under this job will earn overtime and will count toward overtime (as designated by the previous line item being automatically enabled when this line item is checked).

Job is default job for individual – if checked, this job code will be used to collect this employee's time unless a Job Code Change is performed at the time of clock in/out. If they have more than one clockable job code, the default job code will be the first code to show up in the list when clocking in or out.

Force Overtime 1 (Overtime 2) for this Code – if checked, all time worked under this job code will be treated as Overtime (either type 1 or 2).

4.3.3.2. Tracked Fields Tab

This tab is used to designate whether any (or all) of the three available Tracked Fields will be utilized with this Job Code for this template.



Tracked fields are used to track amounts with shifts. For example, tips for waitstaff, pieces for a manufacturer, or parts for a builder.

Edit Job Code

Information | **Tracked Fields** | Custom | Accruals

Require entry of tips: On Clock Out

Require entry of pieces: Manager entry only

Require entry of parts: Disabled

Disabled - Tracked field entry for this job code will not be allowed from any client or management application.

Manager entry only - Tracked fields are only entered by a manager through the management software.

On clock in - The individual will be asked to enter this field when clocking in.

On clock out - The individual will be asked to enter this field when clocking out.

On clock in and out - The individual will be asked to enter this field when clocking in and will be allowed to edit that entry when clocking out.

OK Cancel Help

From the drop down box alongside each Tracked Field select the rule that applies for this Tracked Field, for this Job Code, for this Employee – as follows:

- Disabled – no tracked field information is required.
- Manager entry only – entry of tracked field data can only be performed by a manager (via the TimeClock Manager application).
- On clock in – the employee will be asked to input the tracked field data upon clock in.
- On clock out – the employee will be asked to input the tracked field data upon clock out.
- On clock in and clock out – the employee will be asked to input the tracked field data upon clock in *and* upon clock out.

4.3.3.3. **Custom** Tab

This tab is used to configure any Custom, or user-defined, employee fields for this template. Available custom fields will display in the “Field” column. To input data for this job code, double click on the line item and type your input to the “Description” column (or make a selection from the drop-down box displayed if this custom field was established as an Item-List type).



If you are configuring Custom Fields for an export module, these employee job custom fields, once configured, will override job code custom fields.

4.3.3.4. Accruals Tab

This tab is used to establish accrual reset and caps for this Job Code, for this Template.

Accrual Reset

Select the rule for resetting each employee's accruals for this Job Code (this template only):

Do not automatically reset accruals to this job code – This option should be selected if carryovers are permitted and accrual balances are not reset to zero at any time.

Reset accruals to this job code on the individuals hire date anniversary – This option should be selected if an employee loses their accrual balance each year upon their hire date anniversary.

Reset accruals to this job code on a specific date – This option should be selected if an employee loses their accrual balance on a specific date each year and the accrual balance gets reset.



On the reset date, the accrual remaining can be reset to XX hours or back to 0. If resetting to a certain value the accrual will only be reset if the individual has more hours accrued than the value. For example, if an individual's sick accruals reset to 40 hours at the end of the year and they only have 36 hours remaining, no reset action will be taken. If however they have 42 hours remaining the balance will reset to 40.

Accrual Caps

If accruals to this Job Code for this Employee should be capped, activate the Cap accruals to this job code box by placing a check mark in it. Complete the definition of the accrual cap rule by designating whether the cap is based on hours accrued or hours remaining and for what period of time.

Hours Accrued: This puts a cap on the total hours accrued for the year.

Hours Remaining: This puts a cap on the total hours remaining after deductions.

Cease accruing hours if hours exceed (Hour cap): This is where you specify the total amount of hours that this job code can accrue during the period specified.

Once all tabs of the Edit Job Code screen have been completed for this job code for this employee, press **OK** to save (or **Cancel** to exit without saving your input).

4.3.3.5. Editing a Job Code on a Template

1. To Edit a job code for a template, click on the job code to select it (it will become highlighted) then press **Edit**.
2. The Edit Job Code screen will display. Make any required changes to the provided tabs then press **OK** to accept your changes (or **Cancel** to return it to previous settings).

4.3.3.6. Deleting a Job Code from a Template

1. To Delete a job code from a template, click on the job code to select it (it will become highlighted), then press **Delete**.
2. You will be asked if you are sure you wish to delete the selected job code, select either **Yes** to complete the deletion or **No** to cancel the deletion.

4.3.4. The Overtime Tab

The **Overtime** Tab is used to designate overtime rules for a template. This determines how overtime is calculated and has nothing to do with pay frequency (for example, you may pay all employees weekly overtime on a semi-monthly pay frequency).

TimeClock Plus allows for the calculation of two overtimes if required. For example, your company may pay time and a half for hours worked between 41 and 60, and double time for any hours worked over 60.



Company-wide defaults can be adopted for a template's overtime rules by checking the "Use Default Information" box

4.3.4.1. Overtime Calculations

From the drop down box, select the method used to calculate overtime for this template. There are 10 options available:



Remember that either of the "Best of" methods requires the entry of a default rate of the employee in order for the best overtime method to be calculated.

Best of Bi-Weekly vs. Daily – the system will calculate overtime on a daily and bi-weekly basis for the employee. Overtime will be based on the higher of the two overtimes.

Best of Weekly vs. Daily – the system will calculate overtimes on a daily and weekly basis for the employee. Overtime will be based on the higher of the two overtimes.

Bi-Weekly – overtime for an employee is based on X hours worked over a 14-day work period.

Both Daily and Bi-Weekly – the system will calculate overtime on a daily and biweekly basis for employees. Total overtime will be a sum of daily overtime plus weekly overtime. With this method, daily overtime is calculated first and then regular hours are calculated to determine weekly overtime.

Both Daily and Weekly – the system will calculate overtime on a daily and weekly basis for employees. Total overtime will be a sum of daily overtime plus weekly overtime. With this method, daily overtime is calculated first and then regular hours are calculated to determine weekly overtime.

Both Daily and Bi-Weekly (2) – the system will calculate overtime on a daily and biweekly basis for employees. Total overtime will be a sum of daily overtime plus weekly overtime. With this method, daily overtime is calculated first and then all hours are re-calculated to determine weekly overtime. The weekly and daily overtimes are merged to obtain the calculations for the period.

Both Daily and Weekly (2) – the system will calculate overtime on a daily and weekly basis for employees. Total overtime will be a sum of daily overtime plus weekly overtime. With this method, daily overtime is calculated first and then all hours are re-calculated to determine weekly overtime. The weekly and daily overtimes are merged to obtain the calculations for the period.

Daily Overtime – overtime for employees is based on an X hour work day.

Salaried – no overtime will be calculated for a salaried employee. However, if selected, an option is available to enter the salaried amount per year for this employee in the Overtime Settings section of the screen. This amount will be used in calculating labor cost for a week.

Weekly Overtime – overtime for employees is based on an X hour work week.



To ensure that biweekly OT is calculated correctly, the biweekly base date must be correctly set up in the Quick Setup Wizard and pay rates must be entered for all job codes.

4.3.4.2. Overtime Multipliers

In the two input boxes, enter the multipliers you use to calculate overtime for this employee (e.g., 1.5 equals time and a half and 2.00 equals double time).

4.3.4.3. Overtime Settings

This section is used to set the number of hours an employee must work in a period to qualify for overtime. Overtime Settings change as you toggle between the Overtime Calculations options (via the drop down menu), allowing you to enter the number of hours required for each type.

1. Individual also earns salaried amount – If checked, you can enter a salaried figure along with overtime. This amount will be used in calculating labor cost for a week.
2. Ignore Regular hours for this individual – If checked, in reports and exports this employee will only show overtime hours.

The Advanced Button

The Advanced Button will take you to a window that allows you to set Holiday Pay and/or Seventh Consecutive Day Overtime Rules for this template.

4.3.4.4. Holiday Pay



In order for an employee to receive Holiday Pay the holiday must be set up in the Holiday Calendar of TimeClock Plus. Refer to Section 5.67 of this manual for information on how to set up of the Holiday Calendar).

If you calculate overtime differently for a day designated as a holiday, select the option Override current overtime calculations. This will make available the two input boxes for number of hours that have to be worked for the holiday to qualify for Overtime 1 or Overtime 2. For example, if you want to pay overtime all day on a holiday, you would set this option to pay Overtime 1 after 0.00 hours per day. If you want to pay Overtime 2 after 8 hours on a holiday you would set it for overtime 2 after 8.00 hours.



The Holiday and 7th day premiums will only take place if it results in more overtime for the employee. The settings will not be processed if the resulting calculations are worse for the employee.

4.3.4.5. Seventh Consecutive Day Overtime

If you pay a shift premium for hours worked on the seventh consecutive day, select the option Pay a shift premium of X dollar(s) per hour and input the amount paid per hour on the seventh consecutive day.

The Accrual Tab is used to assign accruals for sick, vacation, etc. to a template. During the Add process accruals can be selected from the pre-established Accrual Rules or can be added on-the-fly.



The screenshot shows a software window titled "Edit Employee Templates - Default". On the left side, there's a sidebar with a search bar labeled "Go to:" containing the number "1" and a "New" button next to it. Below the search bar is a tree view under "All Templates" where item "1" is selected, showing its description as "Default". The main area of the window has several tabs at the top: "Restrictions" (selected), "Scheduler", "Misc", "Access", "Info", "Custom", "Jobs", "Overtime", and "Accrual". Under the "Restrictions" tab, there is a table with three columns: "Rule Id", "Description", and "Active". The first row contains the values "1", "Vacation - 1 Year", and "Yes". At the bottom of the main panel, there are two buttons labeled "Add" and "Remove", along with a checkbox labeled "Use default information" which is currently unchecked. A footer bar at the very bottom contains navigation buttons: "Prev", "Next", "Criteria", "Mem", "Recall", "Copy", "Save", and "Cancel".

4.3.5.1. To assign an accrual rule to an template

1. Click the **Add** button on the **Accrual** Tab.
2. Click the drop down box designation next to the Accrual Rule Id edit box to access a list of available accrual rules.



*Before accrual rules can be assigned to an employee they must be created in TimeClock Plus via the Configuration Menu > Accrual Rules selection. Accrual rules can be added from the employee Accrual tab by clicking the **New** button, taking you to the Accrual Add process. Refer to section 5.8 for more information on setting up accrual rules.*

- ✓ Select the accrual rule you wish to apply to this template from the drop down menu by double clicking it.
- ✓ If additional rules need to be added, double click those to add them as well. All accrual rules applied to this template will display on this screen.

4.3.6. The **Restrictions** Tab

The **Restrictions** Tab is used to set rules for this template for rounding punches (to the quarter hour for example) and restricting clock in based on number of hours worked in the work week.



Company-wide defaults can be adopted for clock in/out restrictions by checking the “Use Default Information” box on this tab.

4.3.6.1. Auto Rounding (No Schedule Required)

Often companies have a policy that requires clock in and out times to be automatically rounded to the nearest X minutes, backwards or forwards. This feature will automatically round an employee's clock in or out times, up or back, without the need of a schedule. To enable the auto rounding feature:

1. Begin by placing a check in the Clock In or Clock Out box on the Restrictions Tab.
2. Next, enter the number of minutes you want to round to in the To nearest X minutes input box (for example, input 15 if you want to round up to the next quarter hour, or back to the last quarter hour).
3. Next, enter the number of minutes you want to round up from in the Round up at X minutes input box. (for example, input 8 if you want to round up to the next quarter hour if an employee is clocking in at/after 8:08, 8:23, 8:38 or 8:53. If an employee clocks in 7 minutes after, their time will be rounded back to the previous quarter hour). If it is after 8 minutes, it will round to the next quarter hour.

4.3.6.2. Clock In Restrictions

This feature will prevent employees from clocking in if they reached overtime or a specified number of hours based **on their previous clock out**. One or both operations can be used.



This will only restrict a clock in operation. If an employee reaches overtime while clocked in they can continue to work. For additional help managing overtime, use the Approaching Overtime Report to monitor hours in real-time.

To restrict someone from clocking in if they reached overtime on their last shift worked, place a check in the Restrict clock in when individual reaches overtime box.

To restrict someone from clocking in once they have worked a designated number of hours in the week, place a check in the Restrict clock in when individual reaches X hours in the work week and enter the number of hours in the input box.

Note: This will restrict them from clocking in the next time they try clocking in and have gone over the XX hours mark.

4.3.7. The Scheduler Tab

The screenshot shows the 'Edit Employee Templates - Default' window with the 'Scheduler' tab selected. The window has a blue title bar and a standard Windows interface. On the left, there is a tree view under 'All Templates' with '1 Default' selected. The main area contains several sections: 'Approval Required For (Schedule required)' with four checkboxes for 'Early Clock In', 'Late Clock In', 'Early Clock Out', and 'Late Clock Out', each followed by an 'Outside' label and a numeric input field set to '0' minutes. Below this is the 'Round to Schedule' section with two checkboxes: 'Round clock in time to scheduled clock in time when clocking in' and 'Round clock out time to scheduled clock out time when clocking out', each followed by 'up to' and two numeric input fields set to '0' minutes. At the bottom right of the main area is a checkbox labeled 'Use default Information'. At the bottom of the window are navigation buttons: 'Prev', 'Next', 'Criteria', 'Mem', 'Recall', 'Copy', 'Save', and 'Cancel'.

The Scheduler Tab has two purposes on a template:

- ✓ Restricting clock in/out for employees to which the template is applied, based on their schedule
- ✓ Rounding each employee's clock in/out to their schedule



Both of these operations require a schedule for the employee in the TimeClock Plus Scheduler application.



Company-wide defaults can be adopted for restrictions to schedule for this template by checking the "Use Default Information" box on this tab.

If an employee attempts to clock in/out outside the parameters set on the Scheduler Tab, they will not be allowed to do so without a manager's approval.



Rounding takes place before schedule restrictions are applied. For example, if you round early clock in within 15 minutes of their scheduled time and restrict early clock in outside 10 minutes, the restriction will never be used because the time will always be rounded to the scheduled time unless they clock in outside the 15 minute round to schedule time.

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4.3.7.1. Approval Required for (Schedule Required)

This section is used to designate how many minutes early or late an employee can clock in/out without manager approval. To set any or all of these four restrictions, place a check in the box next to restriction you want to activate and input the number of minutes they cannot exceed.

Early Clock In, Outside X minutes – if enabled, this option will prevent an employee from clocking in more than X minutes ahead of their scheduled start time, without manager approval.

Late Clock In, Outside X minutes – if enabled, this option will prevent an employee from clocking in more than X minutes after their scheduled start time, without manager approval.

Early Clock Out, Outside X minutes – this option will prevent an employee from clocking out more than X minutes ahead of their scheduled stop time, without manager approval.

Late Clock Out, Outside X minutes – this option will prevent an employee from clocking out more than X minutes after their scheduled stop time, without manager approval.

4.3.7.2. Round to Schedule

This section is used to automatically round an employee to their scheduled clock in and out times, for those organizations paying to schedule.



Reminder - Rounding takes place before schedule restrictions.

Round clock in time to scheduled clock in time when clocking in up to X minutes early or Y minutes late – will round the employee's clock in time to their schedule if they are up to X minutes early or Y minutes late. If they are outside the X and Y parameters, their actual clock in time will be recorded.

Round clock out time to scheduled clock out time when clocking out up to X minutes early or Y minutes late – will round the employee's clock out time to their schedule if they are up to X minutes early or Y minutes late. If they are outside the X and Y parameters, their actual clock out time will be recorded.

Once "Round-to-Schedule" restrictions have been added for an employee they can be tested by pressing the **Test** button on the bottom of this tab. The **Test Schedule Rounding** screen will display which allows you to simulate how a clock in or clock out will be treated based on the rounding and schedule restrictions you have established.



The order in which they appear in the Test Schedule Rounding, is the order in which rounding took place.

1. Enter the date you wish to perform the simulation for in the Date: field.
2. Enter the clock in or clock out time you wish to test in the Time: field and select either In or Out to designate whether you want to test this time as a clock in or clock out punch.
3. Press the **Test** button.
4. Results of the test will display on the screen for rounding to schedule, auto rounding, and schedule restrictions for this employee. If expected results do not display, press **Close** and return to the Restrictions and Scheduler tabs to change your settings.

4.3.8. The **Miscellaneous** Tab

The Miscellaneous Tab is used to provide additional detail about employees to which a template is applied, and any approvals required for their time.

4.3.8.1. Options

This section of the screen is used to designate whether the approval of shifts/time is required for this template.

Shifts worked must be approved by a manager before week can be closed – If this option is checked, all shifts for employees must be approved by a manager before the week can be closed. This approval is performed via Edit Hours or the Approval Manager.

Shifts worked must be approved by this individual before the week can be closed – If checked, all shifts for employees must be approved by the employee before the week can be closed. This approval is performed via the View Hours Process provided by the On-Screen TimeClock or Edit Hours.



All required approvals must be completed before the Close Week Process is begun. See Section 9.2 for more information on the Approval Manager.

Always use default job code when clocking in – If checked, the system will use the default Job Code when clocking in.

4.3.9. The **Access** Tab

This tab is used to designate which TimeClock Plus Users have access to template employee's personal information, whether through universal or individual access.

The screenshot shows the 'Edit Employee Templates - Default' window with the 'Access' tab selected. The window has a blue title bar and standard Windows window controls. On the left, there is a 'Go to:' field with the value '1' and a 'New' button. Below this is a list of templates with columns 'Template Id' and 'Template Description'. The first item is '1' with description 'Default'. On the right, there are tabs for 'Info', 'Custom', 'Jobs', 'Overtime', 'Accrual', 'Restrictions', 'Scheduler', 'Misc', and 'Access'. The 'Access' tab is active, showing a list of users with checkboxes for access. The list has columns 'Access', 'UserId', and 'Name'. The users listed are CBARTHOW (Connie Barthow), HJACOBS (Heather Jacobs), and TJOHNSON (Tom Johnson). HJACOBS and TJOHNSON have red checkmarks in the 'Access' column. Below the list, there are two legend items: a blue square for 'Granted universal access' and a red square for 'Granted individual access'. At the bottom of the right pane, there is a 'Manager' section with a dropdown menu labeled 'Individual's Manager:' showing '<< No manager assigned >>'. At the very bottom of the window, there are buttons for 'Prev', 'Next', 'Criteria', 'Mem', 'Recall', 'Copy', 'Save', and 'Close'.

Access	UserId	Name
<input type="checkbox"/>	CBARTHOW	Connie Barthow
<input checked="" type="checkbox"/>	HJACOBS	Heather Jacobs
<input checked="" type="checkbox"/>	TJOHNSON	Tom Johnson

Universal access is determined via the User List settings (Configuration > User List). Individual access is granted on this screen by clicking on the User you wish to add access to and placing a red check mark next to their name.



If you specify a user on the Access Tab to have access to an employee, it automatically adds that employee to that particular user's list of available employees. This saves you from having to enter in the information in both places, in the User list as well as the Access tab of the employee.

Manager – The employee's manager can also be designated via the drop down menu at the bottom of this tab. You can filter Criteria based on the Manager field.

4.3.9.1. To Save the New Template

To save the new Template you must press the **Save** button at the bottom of the **Edit Employee Templates** screen. If you press **Close**, all information will be lost and the system will exit the **Edit Employee Templates** screen.

4.4. Employee Defaults

Section 4.3 addressed the use of the Employee by those companies with employee groups and common work rules for those groups. For companies with similar rules for most or all of their employees (e.g., a single overtime pay rule, common accrual rules, and/or clock in/out restrictions), a helpful shortcut provided for entering new employees is the ability to set up **company-wide defaults for specific employee fields**. These defaults can then be applied via a simple check box for each employee rather than having to be manually input for each.



Establishing default rules for employees is highly recommended for any company that applies standard treatment of Overtime, etc. to all or most of their employees.

To access the Employee Defaults settings, from the TimeClock Plus Manager Main Menu, select “Employee”, then “Default Information”. Walk through each of the four Employee Default Tabs (Overtime, Accrual, Restrictions, and Scheduler) and input the settings most common to the largest population of employees (applying these defaults when inputting a new employee is described in Section 4.3 of this manual.)



Refer to section 4.3 for detailed information on how each option/setting operates for the Overtime tab, Accrual tab, Restrictions tab, and Scheduler tab.

4.5. Using Criteria to Filter Processes and Reports

Because companies often need to perform certain operations only for a select group of employees (for example, by physical location or for one department), the TimeClock Plus system provides the ability to filter employees when performing several processes in the system. The use of Criteria to filter is presented here because how you will filter/group your employees determines how you use several of the standard and custom fields within the system (such as Classification or Custom Fields).

A few examples of processes that utilize Criteria for filtering are:

- ✓ Running a Report
- ✓ Globally Adding/Deleting a Job Code for Employees
- ✓ Globally Adding a Shift for Employees
- ✓ Exporting Employee Information for the Pay Period
- ✓ Sending a Message to a Group of Employees
- ✓ Viewing a Log of Clock In/Out Overrides by Managers
- ✓ Viewing employee lists

All processes that can be filtered feature a **Criteria** button on their input screens which when pressed displays the following **Criteria** Screen.

Criteria

Standard Fields:

- ☐ Filter by individual's number to Include ...
- ☐ Filter by classification to Include ...
- ☐ Filter on default job code to Include ...
- ☐ Filter on hire date to include from to
- ☐ Filter on days since hire to include from to
- ☐ Filter on individual's manager to include No manager assigned
- ☐ Filter on department Equals
- ☒ Exclude suspended individuals
- ☒ Exclude terminated individuals
- ☐ Exclude salaried individuals

Custom Fields:

- Custom field: <<< Not Used >>> Equals
- Custom field: <<< Not Used >>> Equals
- Custom field: <<< Not Used >>> Equals

OK Cancel Preview Load Save Default

Filtering can be performed based on one field or a combination of the Standard Fields and Custom Fields presented on the **Criteria** Screen as follows:

- Filter by individual's number – if checked, this field allows you to “include” or “exclude” a single individual or range of individuals by their employee number.
- Filter by classification to – if checked, this field allows you to “include” or “exclude” individuals by a single classification code or range of classification codes.
- Filter on default job code to – if checked, this field allows you to “include” or “exclude” individuals by a single default job code or range of default job codes (Note: all employees may or may not have a default job code designated on their personal record via the Jobs tab).
- Filter on hire date to include from – if checked, this field allows you to only include employees hired between the two input dates.
- Filter on days since hire to include from – if checked, this field allows you to include employees based on the number of days since their hire date (a single day or range of days since date of hire).
- Exclude suspended individuals – if checked, all employees that have been suspended (via a check box on the individual's Info Tab) will not be included in the results. This box is checked via default.
- Exclude terminated individuals – if checked, all employees that have been terminated (a date entered in the terminate date field), will not be included in the results.
- Exclude salaried individuals – if checked, all employees that utilize the “Salaried” overtime calculation category will be excluded from the results.

- **Custom Fields** – if any or all of these fields are chosen, they will be used to determine who is included in the process. You can filter the Custom Fields to those that are Equal, Contains, Starts With, or Ends With whatever value you specify.



For example, you can filter on a custom field called 'Home Department', where it Equals 'Tech'. With that setting, the software will only show the employees that have the Custom Field Home Department with a value of 'Tech'.



The Custom Fields presented on the Criteria screen are defined for the company via Configuration > Preferences > Custom Fields menu options. See the next section for a discussion of these fields.

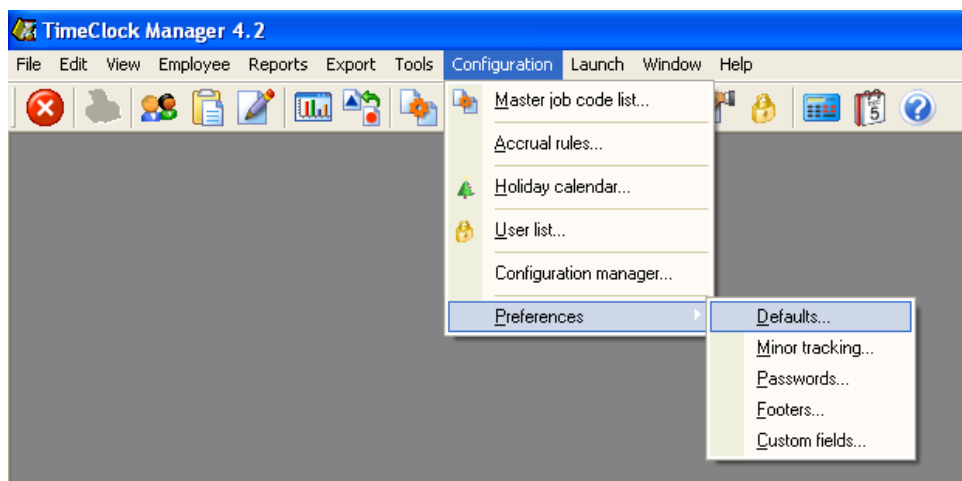
QUICK START – NEXT STEP: Continue the set up of the TimeClock Plus Manager. Go to Section 5 of this User Guide to establish defaults, users, passwords, etc.

SECTION V: INITIAL SETUP ADDITIONAL SYSTEM-WIDE SETTINGS

This section of the User Guide should be viewed as a continuation of Section IV as it addresses additional settings that will impact your use of the system going forward. Many of these settings were established during the Quick Setup Wizard (optional).

5. Setting TimeClock Defaults (Configuration > Preferences > Defaults)



This section addresses the setting of “defaults” which govern how different functions in TimeClock Plus operate (such as the On-Screen TimeClock, TimeClock Manager, and the Scheduler). Defaults are accessed from the Configuration menu of the TimeClock Manager.



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There are four categories of settings that can be addressed via TimeClock Defaults:

- System-Wide Settings
- TimeClock Manager
- TimeClock Scheduler (only required if Scheduler will be utilized)
- TimeClock Client (applicable to both On-Screen TimeClock & RDTs)

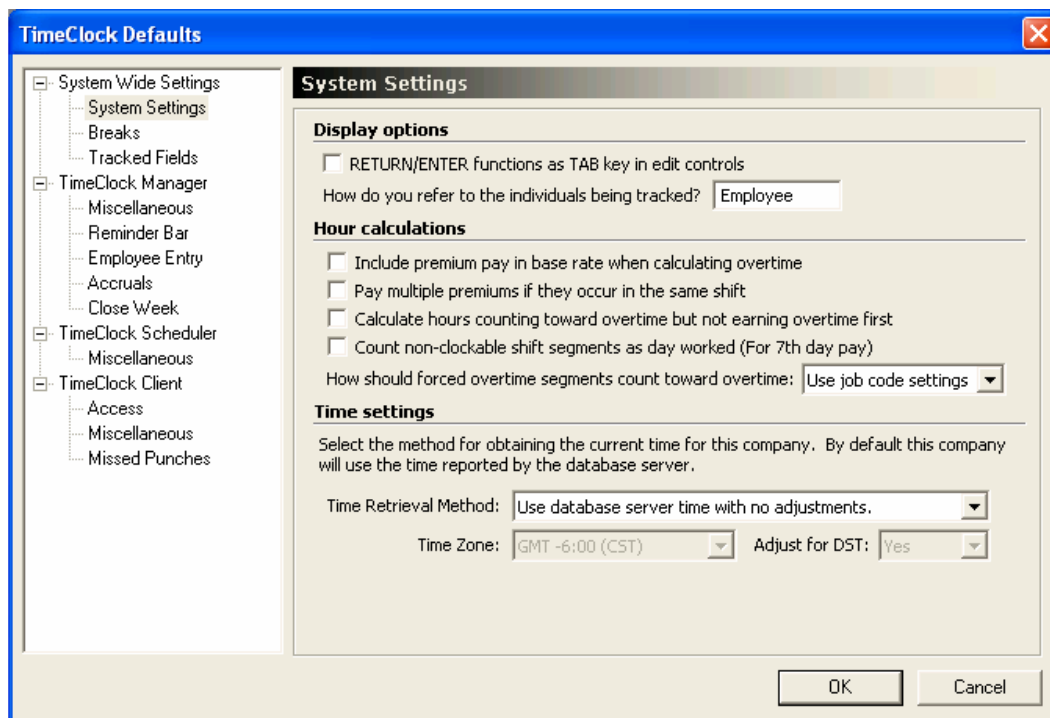
To expand the list of options for any of the categories, click on the  box (if the  box is displayed, the item has been fully expanded and there are no other options).

5.1. Defaults, System Wide Settings

5.1.1. System Wide Settings

This section addresses several different features used throughout the TimeClock Plus system, such as Breaks, Hour Calculations, and Time Settings.

5.1.2. System Settings



The screenshot shows the 'TimeClock Defaults' dialog box with the 'System Settings' tab selected. The left sidebar lists categories: System Wide Settings, TimeClock Manager, TimeClock Scheduler, and TimeClock Client. The main area is divided into three sections: 'Display options' with a checkbox for 'RETURN/ENTER functions as TAB key in edit controls' and a text field for 'How do you refer to the individuals being tracked?' set to 'Employee'; 'Hour calculations' with four checkboxes for overtime and shift settings, and a dropdown for 'How should forced overtime segments count toward overtime?' set to 'Use job code settings'; and 'Time settings' with a description, a dropdown for 'Time Retrieval Method' set to 'Use database server time with no adjustments.', a dropdown for 'Time Zone' set to 'GMT -6:00 (CST)', and a dropdown for 'Adjust for DST' set to 'Yes'. 'OK' and 'Cancel' buttons are at the bottom right.

5.1.2.1. Display options

RETURN/ENTER functions as TAB key in edit controls – if checked, when you press the RETURN or ENTER key you will tab through the input fields.

How do you refer to the individuals being tracked? – Input the term you use for employees (associates, students, et cetera). This term will display in the main TimeClock Plus Menu to access the “Employee” menu.

5.1.2.2. Hour Calculations

Include premium pay in base rate when calculating overtime – if checked, the overtime rate will be calculated using the formula (base + premium) X overtime factor. If not checked, the calculation will be (base X factor) + premium.

Pay multiple premiums if they occur in the same shift – if checked, the employee will earn both holiday and 7th consecutive day premiums (if a holiday occurs on the 7th consecutive day of a workweek). If not checked, the employee will only earn the higher of the two premiums.

Calculate hours counting toward overtime but not earning overtime first – If checked, the system will push all non clockable hours to the beginning of the day or week, before overtime is calculated. If not checked, all hours will be counted in relation to overtime on the day and time that they are worked.

5.1.2.3. Time Settings

The Time Setting section is used to define how time for clock in/out should be determined and/or adjusted (for time zones and/or daylight savings time).

Time Retrieval Method - There are three options as follows:

1. Use the database server time with no adjustments – If selected, client workstations and RDTs will pull their time from the database server with no adjustments made for time zones. This setting should be selected if all client workstations and RDTs are located in the same time zone as the database server.
2. Use the database server time adjusted to time zone – If selected, client workstations and RDTs will pull their time from the database server and a time zone adjustment will be applied. This setting should be selected if client workstations and RDTs are *not* located in the same time zone as the database server. This option should be utilized for an organization collecting time in a distributed environment across multiple time zones. The system will automatically adjust in/out punches based on the actual time zone in which work is being performed (must set Time Zone in the next section).
3. Use the local system time – If selected, each client will pull time from its own clock and not look to the database server.



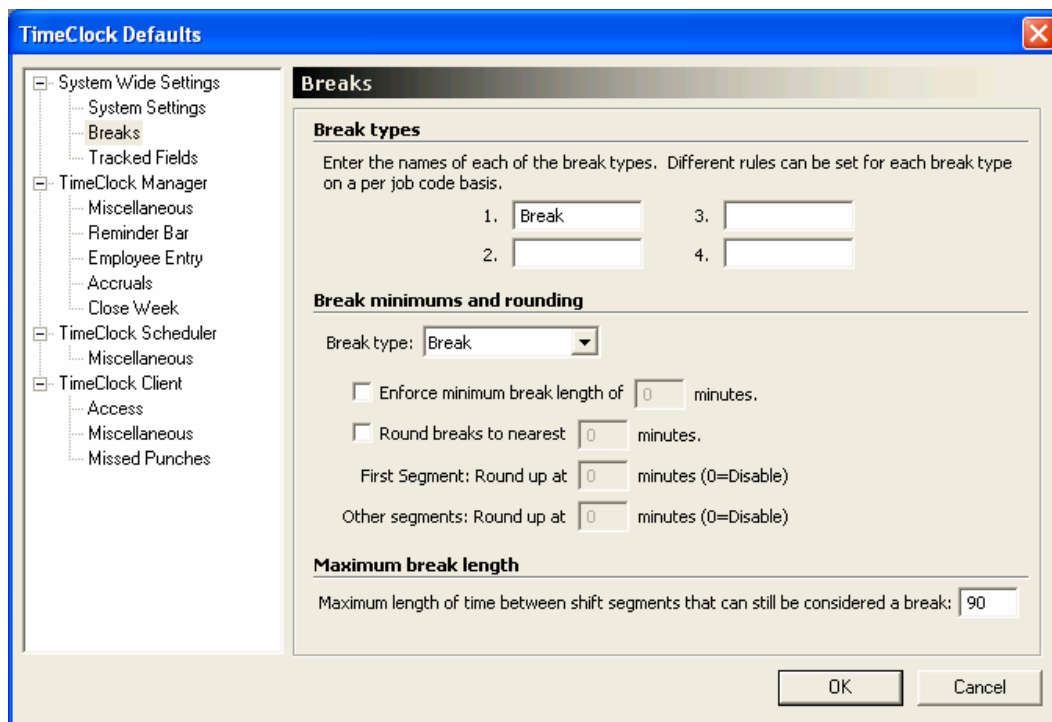
This option is not recommended because if an employee changes the system time at the point of clock in, it will change the recorded time.

Time Zone – This option becomes available only if you configure the system to “Use the database server time adjusted to time zone” (see above description). If the field is available, input the time zone in which your clients are installed.

Adjust for daylight savings time – Select “Yes” if you want the TimeClock system to adjust for daylight savings time. When using MSDE 2000 or SQL Server 8.0 or later, the system pulls the UTC time so it never adjusts for daylight standard time unless you use the database server time with no adjustments.

5.1.3. Breaks

The TimeClock Plus application allows for the set up and use of up to four different types of breaks. These break types can be used for any Job Code. Some Job Codes may not have a break type assigned (breaks are assigned to job codes as part of their definition via “Configuration”, “Master Job Code list”).



The screenshot shows the 'TimeClock Defaults' dialog box with the 'Breaks' tab selected. On the left is a tree view with categories: System Wide Settings (containing System Settings, Breaks, and Tracked Fields), TimeClock Manager (containing Miscellaneous, Reminder Bar, Employee Entry, Accruals, and Close Week), TimeClock Scheduler (containing Miscellaneous), and TimeClock Client (containing Access, Miscellaneous, and Missed Punches). The 'Breaks' section is expanded. The main area is divided into three sections: 'Break types' with four input boxes (1. Break, 2., 3., 4.); 'Break minimums and rounding' with a 'Break type' dropdown set to 'Break', and three checkboxes for 'Enforce minimum break length of 0 minutes', 'Round breaks to nearest 0 minutes', and 'First Segment: Round up at 0 minutes (0=Disable)'; and 'Maximum break length' with a text box set to '90'. 'OK' and 'Cancel' buttons are at the bottom right.

5.1.3.1. Break Types

In the Break type section, input a name for each of the break types to be used in tracking time. Once a break type has been established in one of the four boxes, proceed through the rest of the screen to define break minimums and rounding rules for each break type (see next section).



While defaults for each break type are set at the company-wide level, they can be overridden for an individual job code. An override is set by performing an edit of that job code in the Master Job Code List (“Configuration”, “Master Job Code List”).

5.1.3.2. Break minimums and rounding

To establish settings for a particular break type:

1. Begin by choosing it from the drop-down box next to "Break type:" (it will only show up in the drop-down box if it has been added in the Break types section as described above).
2. Next, select and complete these two settings as applicable:

Enforce minimum break length of X minutes – to activate, check the box and enter the minimum number of minutes an employee has to remain on this type of break in the input box.

Round breaks to nearest X minutes – to activate break rounding, check the box and input the number of minutes you want to round breaks to (e.g., you may want to round this type of break to the nearest 15 minutes.)

- First Segment: Round up at X minutes – the 'First Segment' is the first rounding segment of the break. A segment refers to the period of time entered in the field on the previous line. For example, if you round to the nearest 15 minutes after 8 minutes. You would enter 15 minutes as the amount being rounded, and set the first segment to round up at 8.



Entering a "0" will disable rounding of the segment (15 minutes).

- Other Segments: the 'Other Segments' are all other break segments after the First Segment. Round up at X minutes – other segments refers to all segments after the first. Entering a "0" will disable rounding for all other segments.

5.1.3.3. Maximum Break Length

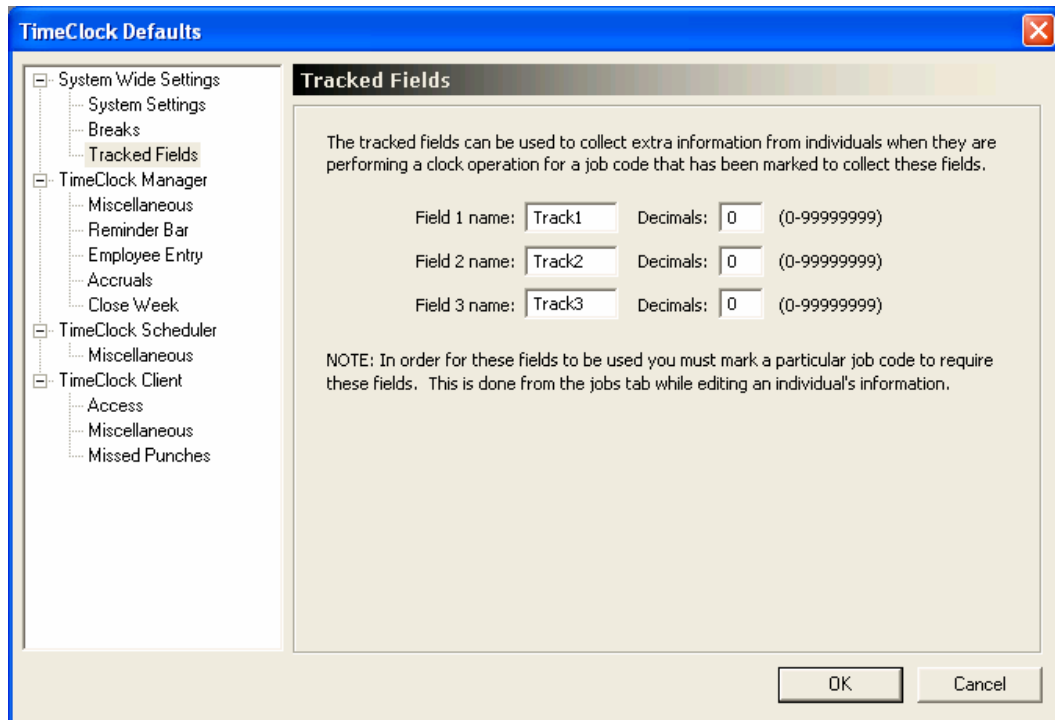
Input the maximum number of minutes that you can be on break and still be considered on break in the input box.



For example, an employee clocks out for break and goes home while on break without clocking back in. You would not want a clock in on the following day to be tied to the previous day's shift.

5.1.4. Tracked Fields

As discussed in Section 4.2.4 of this manual, Tracked fields are used in TimeClock Plus to collect information from employees as they clock in and/or out of a shift, such as “tips” in a restaurant or “pieces” in a production environment. This also requires that the Job Code being utilized has been set to require the collection of tracked field information.



The screenshot shows the 'TimeClock Defaults' dialog box with the 'Tracked Fields' tab selected. The left sidebar lists various settings categories, with 'Tracked Fields' highlighted under 'System Wide Settings'. The main area contains a description of tracked fields and three input fields for 'Field 1 name', 'Field 2 name', and 'Field 3 name', each with a 'Decimals' field and a placeholder '(0-99999999)'. A note at the bottom explains that job codes must be marked to use these fields. 'OK' and 'Cancel' buttons are at the bottom right.

Field name	Decimals	Placeholder
Field 1 name: Track1	0	(0-99999999)
Field 2 name: Track2	0	(0-99999999)
Field 3 name: Track3	0	(0-99999999)

NOTE: In order for these fields to be used you must mark a particular job code to require these fields. This is done from the jobs tab while editing an individual's information.

There are two steps to configure tracked fields in the system – setting them up and assigning them to a particular job code.

1. To create a tracked field, enter its name in one of the three Field name fields. Next, in the decimals field, enter the number of decimal places for the field. For example, a restaurant might set the name to Tips and the decimals to 2 in order to collect dollars and cents.
2. The next step is the assignment of the tracked fields to a job code (for example, you might assign the Tips tracked field to a job code for Waitstaff). From the TimeClock Manager Main Menu, select “Configuration”, then “Master Job Code List”. Select the job code from the list that you wish to assign the Tracked Field to and the **Edit Job Code Screen** will display. Enable the Tracked Field you wish to assign to this job code (multiple tracked fields can be assigned to each job code, if applicable).



When an employee clocks in/out using this Job Code they will be prompted to input a value for the Tracked Field. You can disable this at the employee level on their Jobs tab by selecting the Job Code from their assigned Job Code list and disabling tracked fields (removing the check mark).



If you change the entry type for a tracked field in the Master Job Code List, it will not change that setting for the existing employees that already have that Job Code assigned to them. It will only take effect to those employees that are assigned that Job Code after the change.

5.2. Defaults, TimeClock Manager

5.2.1. Miscellaneous

The screenshot shows the 'TimeClock Defaults' dialog box with the 'Miscellaneous' tab selected. The left sidebar lists various settings categories: System Wide Settings, TimeClock Manager, TimeClock Scheduler, and TimeClock Client. The 'Miscellaneous' category under TimeClock Manager is highlighted. The main panel displays three sections: 'Miscellaneous' with a checkbox for 'Display current labor cost on status bar'; 'Reviews' with a text input for 'Schedule a review in' days and a note about scheduling; and 'Adding new Individuals' with a checkbox for 'Automatically grant user access to all individuals added by the user' and a detailed note about access control.

5.2.1.1. Miscellaneous

Display current labor cost on status bar – if checked, the current labor cost (cost per hour of all employees currently on the clock) will display on the status bar at the bottom of the TimeClock Manager main window.



Labor Cost is based on the sum of the hourly rates for each employee working at that time. It is not recommended to enable this option if running over a slow connection if this information is not needed.

5.2.1.2. Reviews

Schedule a review in XX days when a new individual is added – the TimeClock Manager will automatically schedule a review for new employees if this field is populated (a 0 in

the field will disable this function) *and* the employee has a valid hire date entered at the time they are added to the TimeClock system.



Upcoming scheduled reviews can be seen by viewing the Reminder Bar under the View Menu.

5.2.1.3. Adding New Individuals

Automatically grant user access to all individuals added by the user – if checked, when a system user adds a new employee to the system via “Employee”, “Add/Edit” they will automatically be granted access to the personal record of the individual they added. If not checked it will be possible for a user to add a new employee and immediately be denied access to that employee.

5.2.2. Reminder Bar

The Reminder Bar section allows you to specify how you would like the Reminder Bar to view and display Tasks, Reviews, Birthdays, and Anniversaries.

5.2.2.1. Tasks

Automatically remove a task when it is marked complete – If checked, once you mark a task as complete, it will be removed from the Task list.

5.2.2.2. Reviews

Display reviews within the past XX days and in the next XX days. – You specify the time frame in which the next reviews should show in the Review Bar.

5.2.2.3. Birthdays

Display birthdays within the past XX days and in the next XX days. – You specify the time frame in which the next birthdays should show in the Review Bar.

5.2.2.4. Anniversaries

Display anniversaries within the past XX days and in the next XX days. – You specify the time frame in which the next anniversaries should show in the Review Bar.

5.2.3. Employee Entry

The screenshot shows a software window titled "TimeClock Defaults" with a sub-tab "Employee Entry". On the left is a tree view with categories: System Wide Settings (containing System Settings, Breaks, Tracked Fields), TimeClock Manager (containing Miscellaneous, Reminder Bar, Employee Entry, Accruals, Close Week), TimeClock Scheduler (containing Miscellaneous), and TimeClock Client (containing Access, Miscellaneous, Missed Punches). The "Employee Entry" item is selected. The main area of the dialog contains the instruction "Select all of the fields that are required when entering information into an individuals record:" followed by a list of fields with checkboxes. The fields are: First name (checked), Last name (checked), Address 1, Address 2, City, State, Zip, Export code, Hire date, SSN, Birthdate, Classification, Phone number, E-Mail Address, Department, Network Id, and Badge Number. At the bottom right are "OK" and "Cancel" buttons.

Field	Required (Checked)
First name	<input checked="" type="checkbox"/>
Last name	<input checked="" type="checkbox"/>
Address 1	<input type="checkbox"/>
Address 2	<input type="checkbox"/>
City	<input type="checkbox"/>
State	<input type="checkbox"/>
Zip	<input type="checkbox"/>
Export code	<input type="checkbox"/>
Hire date	<input type="checkbox"/>
SSN	<input type="checkbox"/>
Birthdate	<input type="checkbox"/>
Classification	<input type="checkbox"/>
Phone number	<input type="checkbox"/>
E-Mail Address	<input type="checkbox"/>
Department	<input type="checkbox"/>
Network Id	<input type="checkbox"/>
Badge Number	<input type="checkbox"/>

This screen is used to define for the system which fields will be required when adding a new employee into the TimeClock Plus system. To require a field, place a check in the box next to that field and click **OK** to save these settings.

5.2.4. Accruals

The screenshot shows a software window titled "TimeClock Defaults" with a blue title bar and a red close button. On the left is a tree view with the following structure:

- System Wide Settings
 - System Settings
 - Breaks
 - Tracked Fields
- TimeClock Manager
 - Miscellaneous
 - Reminder Bar
 - Employee Entry
 - Accruals (highlighted)
 - Close Week
- TimeClock Scheduler
 - Miscellaneous
- TimeClock Client
 - Access
 - Miscellaneous
 - Missed Punches

The main area of the window is titled "Accruals" and contains the following settings:

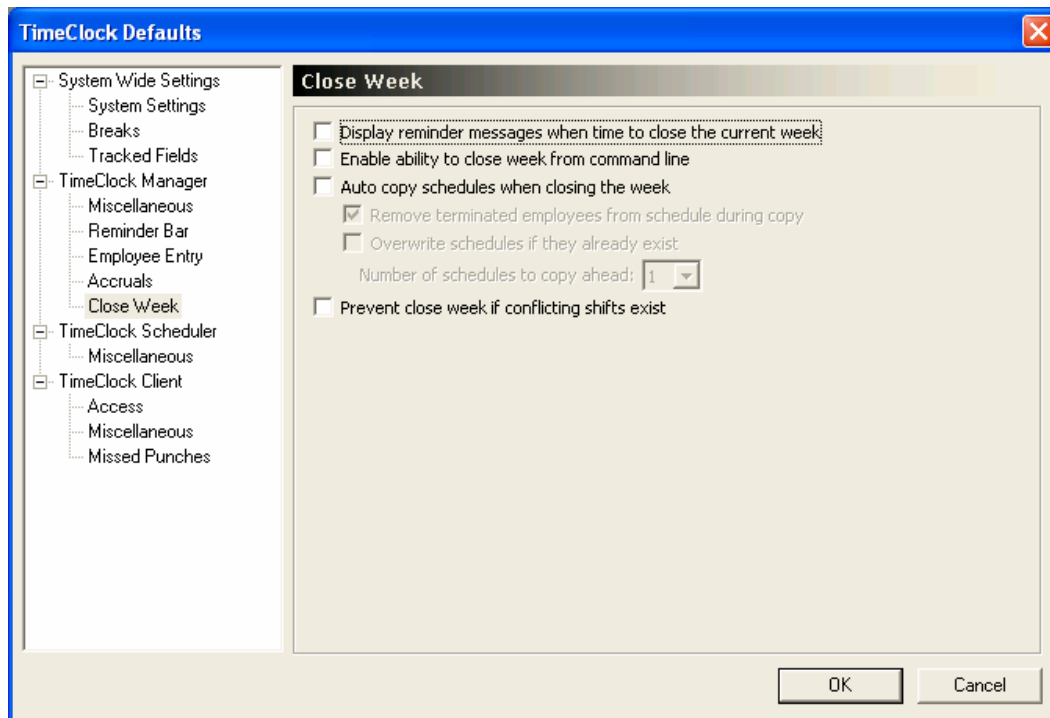
- A label "What day of the week do weekly accruals post:" followed by a dropdown menu showing "7th" and the text "(Saturday)".
- Three checkboxes:
 - ☒ Do not post accruals for an individual if they are marked suspended
 - ☒ Do not post accruals for an individual past his/her termination date
 - ☐ Do not post accruals for an individual prior to his/her hire date

At the bottom right are "OK" and "Cancel" buttons.

This screen is used to define when accruals should be posted to employee records. Begin by identifying which day of the week to post weekly accruals (1st through the 7th). Next, check any of the three line items to activate the rules related to posting accruals for suspended, terminated and new employees.

5.2.5. Close Week

This screen contains four settings related to the Close Week process required by the TimeClock Manager.



Display reminder messages when time to close the current week – if checked, the system will display a reminder to all users with access to the Close Week function when they first log into TimeClock Manager and it is time to close a week.

Enable ability to close week from the command line – if checked, allows the week to be closed without having to manually run the TimeClock Manager and perform the close operation. This function should be used in conjunction with a scheduling program that will carry out the command line at a preset time.

When you click on this option, a screen will appear with the format of the command line and a warning about security. To perform the Close Week process from the command line or from a shortcut on the desktop, configure the command to run as “<PROGRAMDIR>WINMG32.EXE / company:<x> / closeweek” where <x> is the company ID you wish to close and <PROGRAMDIR> is the program directory where TimeClock Plus is installed. If you do not know the company ID number, it is displayed in the Select Company function under the File Menu option in TimeClock Manager. Make sure that this command is run in the TimeClock Plus program directory.



If you are scheduling the command line close operation using a task scheduler, you should schedule it several days later than the last day of the week to ensure that all edits have taken place before the week is closed. Also, if there are any situations present that would normally cause the close to fail such as an employee is clocked in for the week, the close will be cancelled with no action taken.

Auto copy schedules when closing the week – if checked, this function will copy the current week's schedule to the number of weeks specified (up to 3 weeks). The system will also present two boxes that can be activated (via check mark) to automatically remove terminated employees during the schedule copy and to overwrite schedules if they already exist.



This feature is designed for use by a company with schedules that do not change from week to week.

Prevent close week if conflicting shifts exist – if checked, the system will automatically verify there are no conflicting shifts before allowing the Close Week process to complete.



A conflicting shift exists when you have overlapping punches or hours.

5.3. Defaults, TimeClock Scheduler

This screen allows you to set defaults for how the TimeClock Manager will interact with the TimeClock Scheduler application. If you will not be setting up employee schedules, no settings are required on this tab.

The screenshot shows the 'TimeClock Defaults' dialog box with the 'Miscellaneous' tab selected. The left sidebar contains a tree view with the following items: System Wide Settings, System Settings, Breaks, Tracked Fields, TimeClock Manager, Miscellaneous (selected), Reminder Bar, Employee Entry, Accruals, Close Week, TimeClock Scheduler, TimeClock Client, Access, Miscellaneous, and Missed Punches. The main content area is titled 'Miscellaneous' and contains two sections: 'Shift Window' and 'Absent and Tardy'. The 'Shift Window' section has a text box for 'When schedule restrictions are enabled, a password will be required if a shift cannot be located that is within how many minutes of the current time:' with the value '240' entered. Below it is a note: 'NOTE: The minutes entered must be between 60 and 600.' The 'Absent and Tardy' section has two text boxes: 'An individual is considered tardy after how many minutes late:' with the value '5' entered, and 'An individual is considered absent after how many minutes late:' with the value '10' entered. There are four checkboxes: 'Use actual times instead of rounded times to determine absent/tardy information' (checked), 'Count only one tardy per day' (unchecked), 'Count only one absence per day' (unchecked), and 'Non-clockable shifts found where scheduled for a clockable shift should be counted absent (i.e. Sick or Vacation)' (unchecked). At the bottom right are 'OK' and 'Cancel' buttons.

5.3.1. Miscellaneous

5.3.1.1. Shift Window

When shift restrictions are enabled for an employee and he/she attempts to clock into the system, this setting determines how many minutes to the past and the future the system will look to find a shift for comparison. If they attempted to clock in and it is not within the specified window, a password will be required in order for them to clock in.

Example: If this value was set to 120 minutes and an employee attempts to clock in 150 minutes late, the system will report that there is no shift near the current time and they will not be allowed to clock in without supervisor approval.

5.3.1.2. Absent and Tardy

An individual is considered tardy after how many minutes late: - input the number of minutes an employee must be late before they are considered tardy.

An individual is considered absent after how many minutes late: - input the number of minutes an employee must be late before they are considered absent.

If the next four check boxes are enabled, the result will be:

Use actual times instead of rounded times to determine absent/tardy information – instructs the software to use actual punches (rather than rounded) when determining absent or tardy.

Count only one tardy per day – an employee will only be counted tardy once per day, even if they have multiple shifts and are tardy for more than one of them.

Count only one absence per day – an employee will only be counted absent once per day, even if they miss multiple shifts.

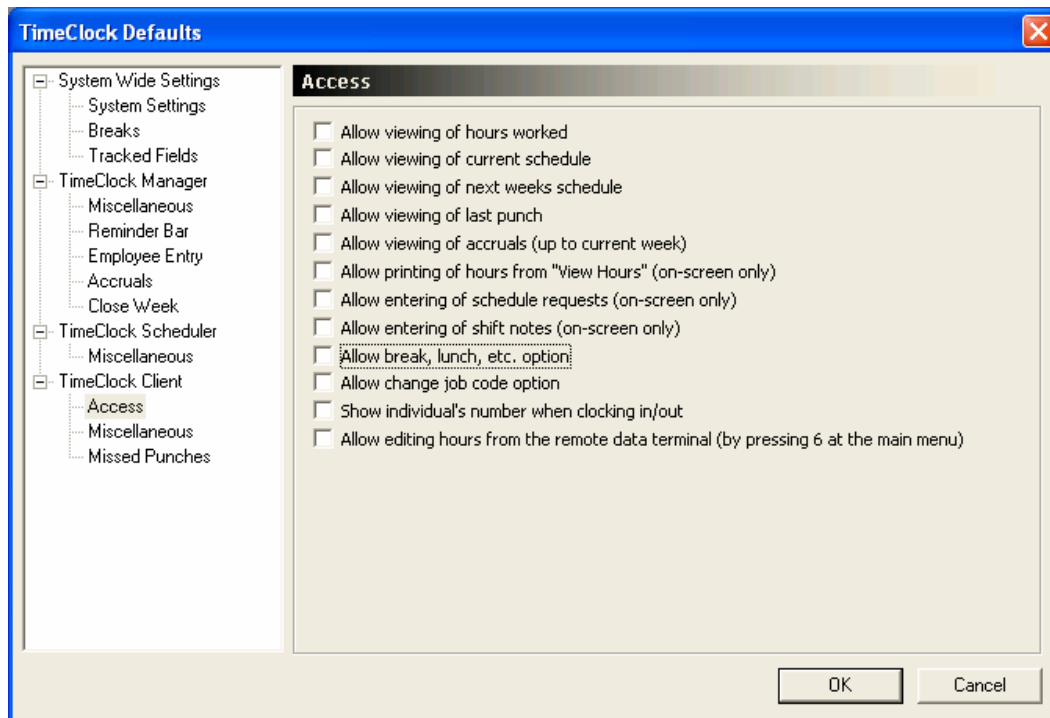
Non-clockable shifts found where scheduled for a clockable shift should be counted absent (e.g. sick or vacation) – if time is entered in a non-clockable job code such as sick or vacation where the employee was scheduled to work, hours will be counted as absent.

5.4. TimeClock Client

This section is used to define default settings for all time collection clients, whether using On-Screen TimeClock, RDT (via WinRemote), or a combination of both.

5.4.1. Access

This screen addresses what features/functions you allow from the On-Screen TimeClock or RDT device.



The checking/enabling of each of these items will result in the following:

Allow viewing of hours worked – allows an employee to view their hours worked for the week to date from the RDT or On-Screen TimeClock.

Allow viewing of current schedule – allows the employee to view their schedule for the current work week from the RDT or On-Screen TimeClock.

Allow viewing of next week's schedule – allows the employee to view their schedule for the next work week from the RDT or On-Screen TimeClock.

Allow viewing of last punch – allows the employee to view their last clock operation from the RDT or On-Screen TimeClock.

Allow viewing of accruals (up to current week) – allows the employee to view their current accrual balance from the RDT or On-Screen TimeClock.

Allow printing of hours from "View Hours" (on-screen only) – allows employees to print their displayed hours worked when viewing from the On-Screen TimeClock.

Allow entering of schedule requests (on-screen only) – allows employees to request schedule changes/time off from the On-Screen TimeClock. (A Schedule Request report is provided with the TimeClock Scheduler application to print requests on an as-needed basis).

Allow entering of shift notes (on-screen only) – allows employees to enter notes for a particular shift when clocking in/out via the On-Screen TimeClock.

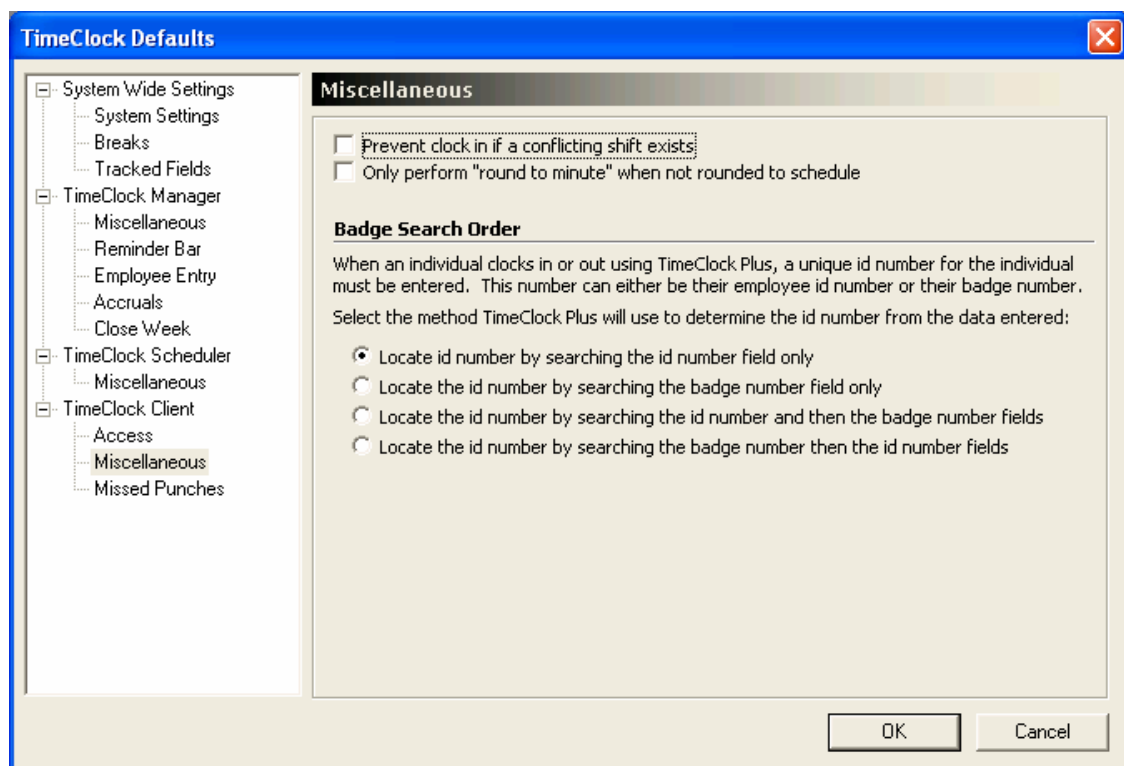
Allow break, lunch, etc. option – the break button will be enabled and active in the On-Screen TimeClock as well as on an RDT device.

Allow change job code option – the change job code button will be enabled and active in the On-Screen TimeClock as well as on an RDT device.

Show individual's number when clocking in/out – the employee's number will display as they enter it to clock in/out of the system. If not enabled, asterisks will display as the number is entered.

Allow editing hours from the remote date terminal (by pressing 6 at the main menu) – users can edit employee hours from the RDT using the edit hours function

5.4.2. Miscellaneous



Prevent clock in if a conflicting shift exists – if checked, employees will not be allowed to clock in if there is a conflicting shift.

Only perform "round to minute" when not rounded to schedule – if checked, the system will not perform both rounding to schedule and rounding to minute.

Badge Search Order

This section is used to define how the TimeClock system will determine who is clocking in/out. When an employee clocks in/out a unique Id number must be entered. This number can either be their employee Id number or their Badge Number – depending on which one of the following options are activated:

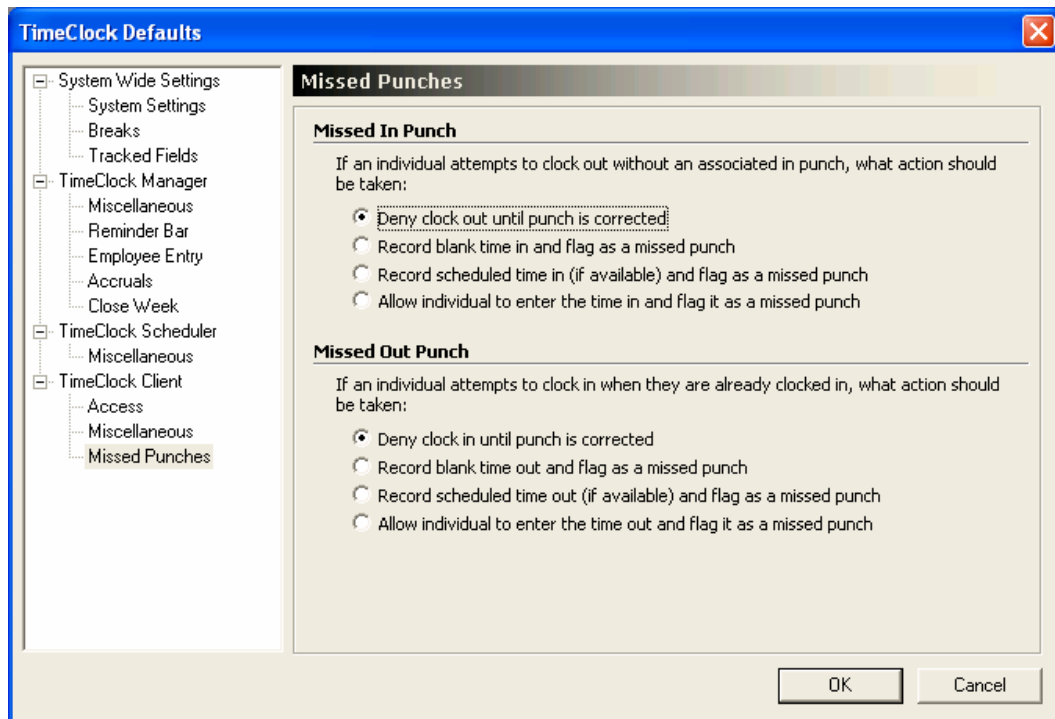
Locate id number by searching the id number field only – If checked, this option looks for the employee using only the employee number.

Locate the id number by searching the badge number field only – If checked, this option looks for the employee using only the badge number set in the Employee Information.

Locate the id number by searching the id number and then the badge number field – If checked, this option looks for a match using the employee number first and the badge number second if no match was found using the employee number.

Locate the id number by searching the badge number then the id number field – If checked, this option looks for a match using the badge number first and the employee number second if no match was found using the badge number.

5.4.3. Missed Punches



Missed In Punch

If an individual attempts to clock out without an associated in punch, which action should be taken (select one of these four options):

Deny clock out until punch is corrected – If checked, this will operate as previous versions did, by denying any clock operation until the time is edited.

Record blank time in and flag as a missed punch – If checked, on a missed punch the system will record the time in, and flag the missed punch as <<Missed>> in Edit Hours.

Record scheduled time in (if available) and flag as a missed punch (would require a schedule for the employee in the TimeClock Scheduler) – If checked, on a missed punch, the system will record the time in, and try to match the missed punch with the nearest scheduled time. If a schedule is found, the missed punch will be flagged and the scheduled time will be entered. If it cannot find a scheduled time, then the system will flag it as a <<Missed>> punch.

Allow individual to enter the time in and flag it as a missed punch – If checked, on a missed punch, the system will allow the employee to manually enter the time that they missed the punch.

Missed Out Punch

If an individual attempts to clock in when they are already clocked in, which action should be taken (select one of these four options):

Deny clock in until punch is corrected – If checked, this will operate as previous versions did, it will deny any clock operation until the time is edited

Record blank time out and flag as a missed punch – If checked, on a missed punch the system will record the time out, and flag the missed punch as <<Missed>> in Edit Hours.

Record scheduled time out (if available) and flag as a missed punch (would require a schedule for the employee in the TimeClock Scheduler) – If checked, on a missed punch, the system will record the time out, and try to match the missed punch with the nearest scheduled time. If a schedule is found, the missed punch will be flagged and the scheduled time will be entered. If it cannot find a scheduled time, then the system will flag it as a <<Missed>> punch.

Allow individual to enter the time out and flag it as a missed punch – If checked, on a missed punch, the system will allow the employee to manually enter the time that they missed the punch.

5.4.4. Setting up Custom Fields (Configuration > Preferences > Custom fields)

The main idea of Custom Fields is to give TimeClock Plus the ability to export required information for payroll software. Custom Fields make it very easy to track additional information that is not standard, as in tracking other information than what can be tracked using the existing fields. Custom Fields provide us a way of creating our own fields to track specific information that may be specific to a payroll software or to your particular company.

Custom Fields can be set up per job code, where each job code can have specific Custom Fields tied to it. They can be set up per employee, where each employee can have specific Custom Fields tied to them. Custom Fields can also be set up per employee job code. This allows you to specify Custom Fields on a per employee basis, associated with one of the job codes that are assigned to them. This will override the job code Custom Fields that were mentioned earlier.

You can have unlimited Custom Fields assigned to the employee, job code, or employee job code. Each custom field can have a character length of up to 200. You can use or force alphanumeric, numeric, alpha, alpha numeric with symbols, full dates (MM/DD/CCYY), partial dates (MM/DD), hour format HH:MM PP, specifically formatted data or you can filter the input. When setting up Custom Fields you can also specify if you want to enter the information manually, if you want to choose it from a pre-built list, or if you want to be able to do both. Custom Fields data can also be imported from an ASCII text file. This does require that the Custom Field be configured prior to the import.

5.4.5. Creating a Custom Field

1. In **TimeClock Manager**, select **Configuration/ Preferences/ Custom Fields**.
2. Select the area this Custom Field will be added into by choosing the tab for Employee, Master Job Code List, or Employee Job Codes, and click the **Add** button.

3. Fill in the fields in the **Edit Custom Field** window. These fields are as follows:

Category – By creating a category, Custom Fields can be separated out into different categories. Custom Fields will be grouped together using this category. Categories are added to the system by having them in at least one Custom Field. Adding a category to one Custom Field will cause it to show up in the drop down list of any other Custom Field. Removing one category from all of its Custom Fields will cause it to disappear from the selection list.

Name – The name of the Custom Field.

Data Type – The type of data that can be entered as a value into this custom field.

Alpha Only (a-z) – Allows only alphabetic characters

Numeric Only (0-9) – Allows only numeric characters

Alpha-Numeric (a-z, 0-9) – Allows any combination of numeric and alphabetic characters

Alpha-Numeric w/symbols – Allows any combination of numeric and alphabetic characters, including symbols such as \$, @, et cetera.



In order to include a space into a Custom Field, Alpha-Numeric w/symbols must be selected

Full Date (MM/DD/CCYY) – Allows full dates to be entered in the MM/DD/CCYY format. For example, 06/22/1985

Partial Date (MM/DD) – Allows partial dates to be entered in the MM/DD format. For example, 06/22

Time (HH:MM PP) – Allows time to be entered in the HH:MM PP format. For example, 11:13 AM

Formatted Data – Allows formatted data to be entered. This means that the exact type of character for each position can be entered into the system. When **Formatted Data** is selected from the list, the field labeled **Format** becomes available. Here, a format that specifies the characters and places can be input. This is done by using 6 different characters. “>” Allows upper case alpha characters. “?” Allows lower and upper case alpha characters. “#” Allows numeric characters. “A” allows upper and lower case alpha characters, as well as numeric characters. “&” Allows any printable character to be used. “\” Treats the following character as a literal, which means that the character is forced to appear exactly as it is entered. For example, the code 1003JWG0935 could be entered as #####>>####. Now, when inputting a value into this custom field, only a value that matches the pattern of 4 numbers, 3 upper case letters, and 4 numbers, would be accepted by the system. Another option in setting up the format is to click the **Create** button. This option allows an example to be input, which the system translates into the format characters. If 1003JWG0935 were input into the **sample** field, the system would automatically create the format of #####>>#### and set it as the format for this custom field.

Filtered Input – Engages a filter that limits what can be entered into this custom field. Only characters entered into the **filter** field will be allowed to be input as values. Ranges can be entered with ‘..’ For example, A..Z0..9 would allow all numbers and letters.

Length – The maximum length that can be input as a value into this field

Entry Type – The method used to input a value into this field.

Edit Only – Allows anything to be entered into this field

Item List – Presents a list of values that can be chosen. One of these items must be selected from the list and cannot be edited.

Item List With Edit – Presents a list of values to be chosen, and also allows modification.

Force Uppercase/Force Lowercase – Forces a certain case onto the characters being entered.

Selection List – This is where the Item List is populated. Items are added into the Selection List in order to make them available to choose when utilizing the **Item List** option.

5.4.6. Accessing the Custom Fields

1. To access the employee custom fields, you must go to employee, add/edit, and view the **Custom** tab.
2. To access the job code custom fields, you must go to configuration, Master Job Code List, edit the job code and view the **Custom** tab.
3. To access the employee job custom fields, you must go to employee, add/edit, jobs tab, edit a job code, and view the **Custom** tab.

5.5. Setting up Users (Configuration > User List)

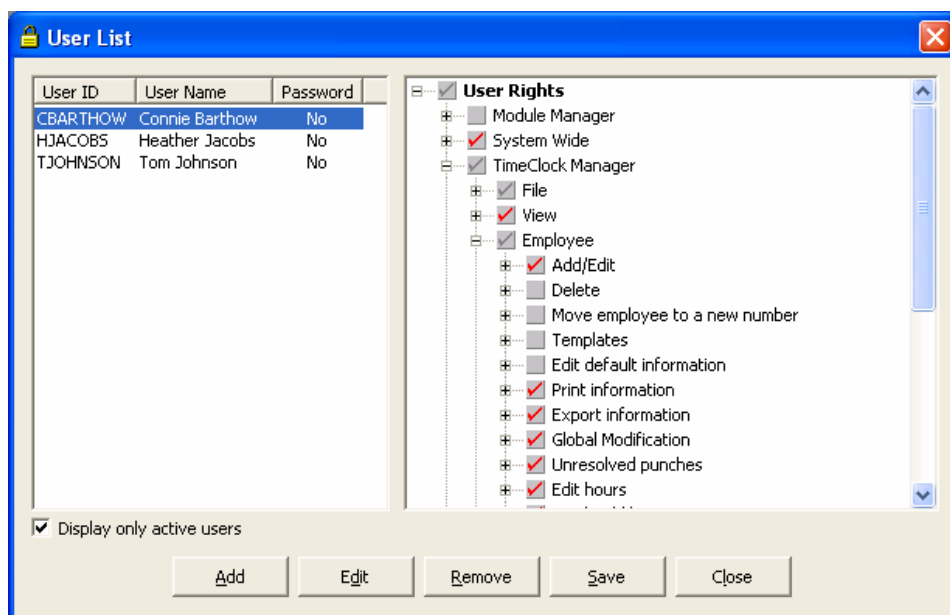
In order to have access to the TimeClock Manager (for correcting time records, producing reports, et cetera.) an individual must be set up as a User. Employees who will be clocking in/out but who will not be accessing the TimeClock Manager do *not* have to be set up as users.

There are three steps to the creation of a user: (1) define the User (Id and Name), (2) set their User Properties, and (3) establish what processes in the system this User Id has permissions for (User Rights).



In most areas of the system, when a user logs onto the system the only items which will display are those which they have been given access/permission.

Access the User List from the TimeClock Manager Main Menu, select “Configuration” and then “User List”. The **User List** screen will display.

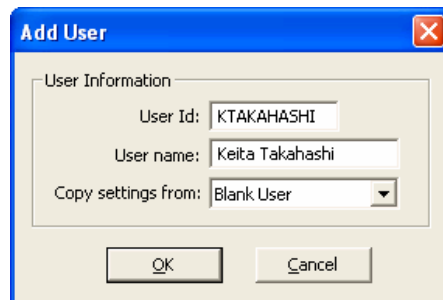


The left side of the screen displays all individuals who have been set up as users. The right side of the screen displays “User Rights” or each individual’s permissions (you must select the individual by clicking on them to access their permissions). To open the restrictions for any application, click on the plus sign to the left of the item.

5.5.1. Step 1 – Define a User ID

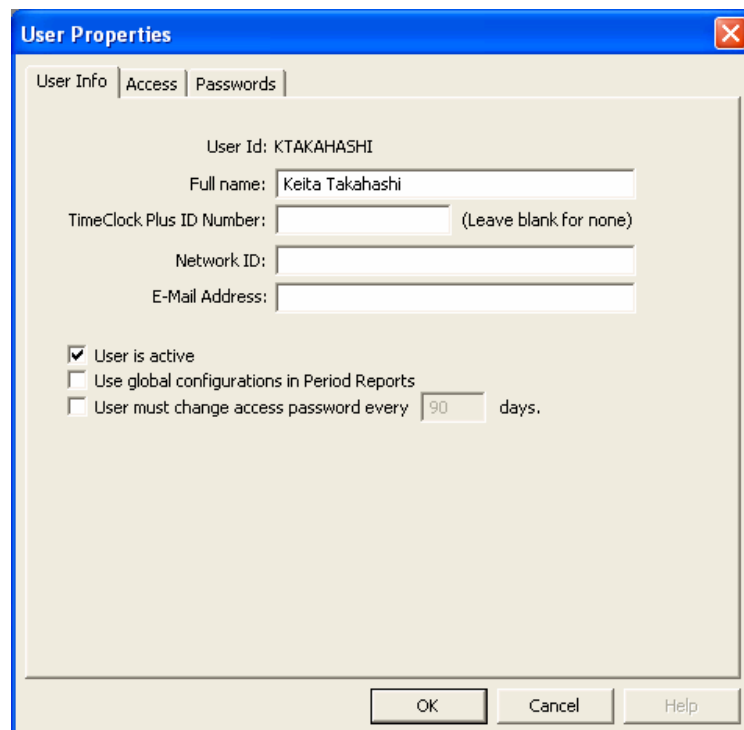
Press the **Add** button on the bottom of the User List screen. The **Add User** screen will display. Input a User Id and User Name into the designated input boxes then click **OK** to accept the addition.

Copy settings from: This option allows you to copy the user settings from another user that has already been created in the User list. You copy the settings from the specific user by entering the user name that you would like to copy the settings from in the 'Copy settings from' drop down box.

A screenshot of the 'Add User' dialog box. It has a blue title bar with the text 'Add User' and a red close button. The main area is titled 'User Information' and contains three input fields: 'User Id' with the text 'KTAKAHASHI', 'User name' with the text 'Keita Takahashi', and 'Copy settings from:' with a dropdown menu showing 'Blank User'. At the bottom are 'OK' and 'Cancel' buttons.

5.5.2. Step 2 – Define User Properties

Select the User from the Id List and press the **Edit** button. Three tabs of **User Properties** display for that specific user.

A screenshot of the 'User Properties' dialog box. It has a blue title bar with the text 'User Properties' and a red close button. The main area has three tabs: 'User Info', 'Access', and 'Passwords'. The 'User Info' tab is selected and shows the following fields: 'User Id' with 'KTAKAHASHI', 'Full name' with 'Keita Takahashi', 'TimeClock Plus ID Number' (empty), 'Network ID' (empty), and 'E-Mail Address' (empty). Below these fields are three checkboxes: 'User is active' (checked), 'Use global configurations in Period Reports' (unchecked), and 'User must change access password every' followed by a text box containing '90' and the word 'days'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

5.5.2.1. **User Info** – The User Id and Full Name will populate for the new user. Complete the three additional fields as follows:

TimeClock Plus ID Number (leave blank for none): This field allows you to track the TimeClock employee number of this specific user. Certain restrictions such as the ability for a user to edit his/her own hours are tied to this field.

Network ID: This field is used to track the network login of this user.

E-Mail Address: This field is used to track the email address of this user so that you can easily view the email address of this manager to email them.



Note the “User is active” check box on the bottom left hand corner of this screen. By unchecking this box the User can become inactive without being deleted from the system.

5.5.2.2. **Access** – This tab is used to designate which employee(s) this user has the permission to view when logged into TimeClock Plus.

Include	Id	First	Last	Class	Department	Term Date
<input type="checkbox"/>	1	Mick	Smythe	0		
<input type="checkbox"/>	2	Joe	Ramos	0		
<input type="checkbox"/>	3	Willy	Smith	0		
<input type="checkbox"/>	4	Willy	Hernandez	0		
<input type="checkbox"/>	5	Franco	Potts	0		
<input type="checkbox"/>	6	Len	Lamos	0		
<input type="checkbox"/>	7	Joseph	Kelly	0		
<input type="checkbox"/>	8	Arnold	Jacobson	0		
<input type="checkbox"/>	9	Curt	Lane	0		
<input type="checkbox"/>	10	Carol	Smith	0		
<input type="checkbox"/>	11	Tom	Jacobs	0		
<input type="checkbox"/>	12	George	Kelly	0		
<input type="checkbox"/>	13	Jack	Kyne	0		
<input type="checkbox"/>	14	Mark	Kyne	0		
<input type="checkbox"/>	15	Mike	Jacobson	0		
<input type="checkbox"/>	16	Arnold	Uma	0		
<input type="checkbox"/>	17	George	Potts	0		

User can access all individuals in the system – if enabled, this user has access to all individuals entered in the TimeClock Plus system.

User can only access specific individuals – if enabled, the list of all current employees in the system will display. Designate each employee this User has access rights for by placing a check mark in their box of the “Include” column.

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You can choose multiple employees by selecting an employee, then holding down the shift key or control key to select multiple employees. You can also click and drag with the mouse to select multiple employees. To select a group of employees matching a certain field, you can sort by that field by clicking the header of the list.

5.5.2.3. Passwords – This tab is used to set passwords for this User, which will be used in four separate areas of the system, as follows:

Password	Blank
System Access	Yes
Remote Data Terminal - Hour Edit	Yes
Remote Data Terminal - Override	Yes
On-Screen Override	Yes

Select a password from the list and click change to modify the password.

Details
This password is used to gain access to TimeClock Manager and Scheduler.

Change

OK Cancel Help

System Access Password – used to gain access to the TimeClock Manager and Scheduler applications.

Remote Data Terminal – Hour Edit Password: used to access the edit hours functionality at a Remote Data Terminal device (RDT).

Remote Data Terminal – Override: used to override clock operations from an RDT. Note that permission to grant overrides is also required for this individual.

On-Screen Override – used to authorize clock overrides in the On-Screen TimeClock. Note that permission to grant overrides is also required.



In order for individuals to be able to edit hours from the RDT, override clock operations from the RDT, and override clock operations from the On-Screen TimeClock, they must be granted permission to perform those operations.

To set/modify one of these passwords, select (highlight) the one you want to change and click the **Change** button on the screen. The Password Change dialogue box will then display for the entry and re-entry of a new password. Press **OK** to accept the password change.

To save User Properties click **OK** (or **Cancel** to exit without savings your input).

5.5.3. Step 3: Establish Processes/User Rights for this User

The left side of the **User List** screen displays all individuals who have been set up as users. The right side of the screen displays “User Rights” or each individual’s permissions (you must select the individual by highlighting them to access their permissions).

User ID	User Name	Password
CBARTHOW	Connie Barthow	No
HJACOBS	Heather Jacobs	No
TJOHNSON	Tom Johnson	No

User Rights

- ☐ Module Manager
- ☐ System Wide
- ☒ TimeClock Manager
 - ☐ File
 - ☐ View
 - ☒ Employee
 - ☒ Add/Edit
 - ☐ Delete
 - ☐ Move employee to a new number
 - ☐ Templates
 - ☐ Edit default information
 - ☐ Print information
 - ☐ Export information
 - ☐ Global Modification
 - ☐ Unresolved punches
 - ☐ Edit hours

☒ Display only active users

Add Edit Remove Save Close

To view a user’s current permissions, highlight them on the **User List**. Their current rights display in the **User Rights** section on the right hand side of the User List. In this example,

Heather Jacobs only has the ability to Add/Edit employees; no other access is provided for.



To open the line items/processes for any application, click on the plus sign to the left of the item. A minus sign in a box notes that there is no more detail to display for this line item. A plus sign indicates that there are more options that can be configured under that section.

To establish permissions for a user, place a check mark in the box to the left of the line item (or remove the check mark to remove permission).

1. Select the User by selecting (highlight) their name and turning on/off their permissions from the processes in the User Rights section (by clicking a line item to place a check mark in its box).
2. To save the User Rights press the **Close** button.

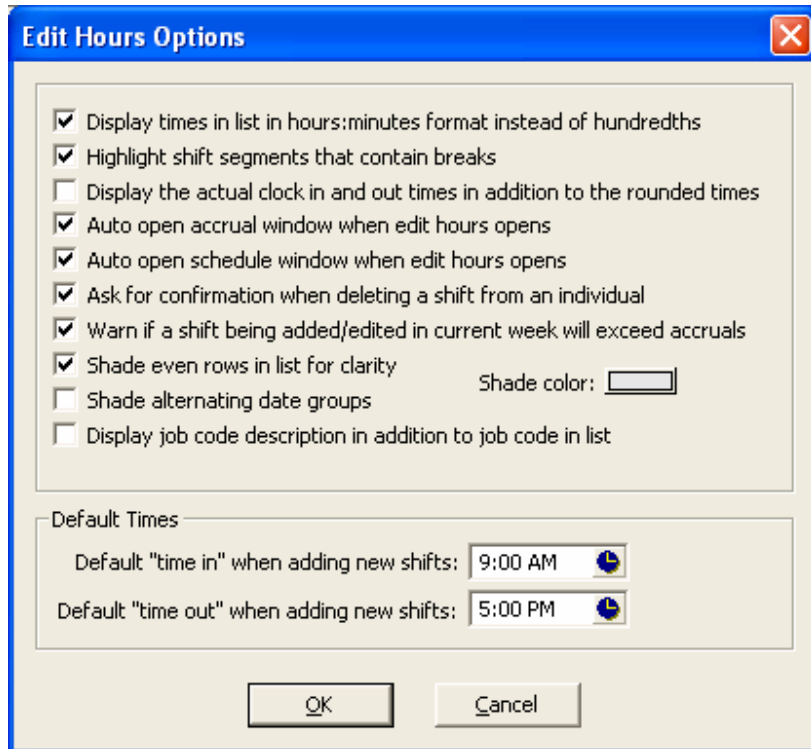


*To remove a current User from the system they can be inactivated or deleted. To inactivate an employee remove the check in the “User is active” box on the **User Info** tab of User Properties. To permanently delete a User select them from the User List and press the **Remove** button. A warning screen will appear and if you wish to complete the removal press **Yes** to accept the action.*

5.5.4. Setting up Display Options for the Edit Hours Screen (Employee > Edit Hours)

The Edit Hours function is used to edit existing shift records or to add a new shift record (for a sick or vacation day for example). The following options determine how data will display on the **Edit Hours** Screen.

1. From the TimeClock Manager main menu select “Employee” then “Edit Hours”.
2. Press the **Options** button on the bottom of the **Edit Hours** screen, the **Edit hours Options** dialog box will display.



3. Each of the eight options displayed can be enabled or disabled to meet your operational needs. These options are:

Display times in list in hours:minutes format instead of hundredths – If checked, the time in Edit Hours will be displayed as HH:MM (hours and minutes) instead of HH.MM (hours and hundredths).

Highlight shift segments that contain breaks – If checked, a shift that contains a break will be highlighted in red in Edit Hours.

Display the actual clock in and out times in addition to the rounded times – If checked, and you have the system configured to round times, the actual times will show along with the rounded times in Edit Hours.

Auto open accrual window when edit hours opens – If checked, when you open Edit Hours, the Accrual Information window will automatically open.

Auto open schedule window when edit hours opens – If checked, when you open edit hours, the Schedule Information window will automatically open.

Ask for confirmation when deleting a shift from an individual – If checked, when you delete a shift in Edit Hours, you will be prompted with a confirmation.

Warn if a shift being added/edited in current week will exceed accruals – If checked, you will be warned if you are adding/editing hours that will exceed accrual totals for that job code.

Shade even rows in list for clarity using this color (click on the color box to change the color to be used for shading) – If checked, the rows will alternate in background color according to the color you specify by the color palette.



If you are operating across a slow connection, by disabling the Auto-Open Accrual and Schedule windows, you may improve performance.

4. Set Default Times - Whenever a shift or time record is entered manually (via Edit Hours) a default start and stop time is populated in the input fields. If all of your employees do not have the same working hours, set these defaults to reflect the start and stop time for the majority of your employees to save time when manually entering time.
5. Press the **OK** button to save your input (or **Cancel** to return to the previous screen without saving your input).

5.6. Setting up Holidays

TimeClock Plus provides the ability to create a holiday schedule and track hours worked on holidays. In addition, you can set overtime rules specific to hours worked on a “holiday” so that hours are categorized correctly and premiums are paid.



A holiday has to be marked in the system in the Holiday Calendar in order for hours to be treated a certain way.

5.6.1.1. Setting the Holiday Calendar:

1. Begin by accessing the **Holiday Calendar** from the TimeClock main menu. Select the Configuration Menu then select “Holiday Calendar”.



2. Use the << Previous and Next >> buttons on the top of the calendar to change to the month being viewed.
3. To designate a day as a holiday either double click on the day or single click to select it and press the **Edit** button. The **Edit Holiday Information screen** will display for the day you selected, as shown below.

Edit Holiday Information for 01/01

Information

Description:

☒ Report shifts worked on this date as holiday hours

Recurrence

☐ Non-recurring holiday
☐ Weekly on day of week
☐ Monthly on same date
☒ Yearly on same date

OK Cancel

4. Enter the name for the holiday in the Description edit box. If all shifts worked on this date are to be reported as holiday hours, activate the check box.
5. Designate the Recurrence rule for this holiday (non-recurring, weekly, monthly, or yearly).

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This allows the holiday to automatically be set weekly, monthly, or yearly without having to go in and add it continuously.

6. Click the **OK** button to save this holiday (or **Cancel** to return to the previous screen without saving input).
7. Continue with these steps until all holidays are designated.



If you want to just report hours worked on holidays but have no special overtime treatment of the hours, stop here. If you need to set overtime rules specific to hours worked on a holiday proceed to the next section.

5.6.1.2. Establishing Different Pay Rules for Days Designated as Holidays:

If a holiday receives certain pay rules you need to configure them by going to Employee then to Add/Edit. Click on the **Overtime** tab and choose the **Advanced** button to configure the Holiday Pay settings. When setting up an employee's personal data (assigning job codes, et cetera), the **Overtime** tab is used to designate how to categorize and calculate pay for hours worked as Overtime for the employee. (Remember: by using Employee Defaults or Employee Templates, overtime rules can be set for all employees or a group of employees in one simple step).

1. The **Advanced** Button on the **Overtime** tab contains a section titled **Holiday Pay** that is used to define how to treat hours worked on a day marked as a holiday (per Configuration > Holiday Calendar).

2. Complete the Holiday pay section of the **Advanced Overtime Settings** screen (on an individual's Overtime Tab, on a Template, or Default Information) by enabling one of the three options:

No special action for these days – if enabled, hours worked on days marked as holidays in the Holiday Calendar will not be treated any differently from normal days.

Override current overtime calculations – if enabled, overtime will be calculated differently on holidays by completing the two input boxes.



Example: If you want to pay for all hours worked on a holiday per your Overtime 1 setting you would enable this option and set Overtime 1 after 0.00 hours in the day. To pay all hours per your Overtime 2 setting you would enable this option and set Overtime 2 after 0 hours in the day.

Pay a shift premium of X dollars per hour – if enabled, all hours worked on a day designated as a holiday will receive a shift premium of X dollars.

3. Save your Holiday Pay settings by pressing the **OK** button (or Cancel to return to the previous screen without saving input).

5.7. Accrual Rules

TimeClock Plus allows for users to create customized accruals. These accruals can be based on time worked by an employee or can be routinely posted at regular intervals regardless of time worked.

5.7.1. To Add or Edit an Accrual Rule

1. In TimeClock Manager, click on the “Configuration” menu and then “Accrual rules”.
2. Click the **Add** button to add a new rule or **Edit** to edit an existing rule. Clicking on either of these buttons will start the Accrual Rule Wizard.

5.7.1.1. Accrual Information

3. Assign the rule an ID number. Every Accrual Rule in the system is tied with a unique identification number. The identification number itself is limited to numeric characters, up to four positions.
4. Give the rule a description. In addition to the unique identification number you must also assign every Accrual Rule to a description. The Accrual Rule description can be alphanumeric and up to 40 positions.

Accrual Information

Each rule in the system must have a unique rule id which is used for tracking the accrual in the system.

Rule ID:

Enter a description for the accrual. This description will show on reports and in an individual's information under the accrual tab if assigned.

Rule description:

Place a check in the following box to activate this accrual rule. If the rule is not active it will be ignored.

☒ Accrual rule is active

< Back Next > Cancel Help

5. Mark the Accrual Rule as being active. **Accrual Rule is Active** – A check mark in this field indicates that the rule is active. If the rule is not marked active it will be ignored, even if it is assigned to an employee. If you would like to temporarily disable a rule, it can be marked inactive.

5.7.1.2. Accrual Type

6. Specify the accrual type for this rule. The accrual can either be based on hours worked or not based on hours worked (based on a lump amount). Once the configuration is complete on this screen, click Next to proceed to the Accrual Period screen.

Accrual Type

☒ Accrual is not based on hours worked in the week being closed

☐ Accrual is based on hours worked in the week being closed

To determine the number of counted hours for the week, what hour types should be included:

☒ Regular hours

☒ Overtime 1 hours

☒ Overtime 2 hours

☒ Hours in non-clockable job codes

☐ Count only selected job codes

Once the number of counted hours have been obtained, use only the hours that fall between and

< Back Next > Cancel Help

Accrual is not based on hours worked in the week being closed – An accrual that is not based on hours worked is one that is just posted on a regular basis regardless of hours worked. An example of this type of accrual would be if an

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employee earns 8 hours of sick time on the last day of each month.

Accrual is based on hours worked in the week being closed – If this option is selected, the accrual will be based on the number of hours worked in the week being closed. The number of hours worked in the week that match the hour types selected in this dialog will be referred to as "counted hours" for the remainder of the accrual rule configuration. An example of this type of accrual would be to accrue 1.5 hours of comp time for each overtime hour worked.

Regular Hours – If this box is checked, the regular hours worked in the week being closed will be included in the counted hours.

Overtime 1 hours – If this box is checked, the overtime 1 hours worked in the week being closed will be included in the counted hours.

Overtime 2 hours – If this box is checked, the overtime 2 hours worked in the week being closed will be included in the counted hours.

Hours in non-clockable job codes – If this box is checked, hours worked in non-clockable job codes (e.g., sick and vacation) will be included in the counted hours. The inclusion of hours for non-clockable hours also depends on the check boxes to include regular, overtime 1, and overtime 2 hours.

Count only selected job codes – If this box is checked, only hours worked in job codes matching the job codes entered, will be included in the counted hours total. To select the job codes to include, click on the button to select them from a list or enter the numbers using commas to separate individual values and dashes to separate ranges.

For example, to include codes 1, 2 and 5 through 10 you would enter "1, 2, 5-10"



Each check box depends on all other check boxes. For example, if you choose to include regular hours in counted hours and do not check to include hours in non-clockable job codes, all regular hours worked in non-clockable job codes will not be included in the counted hours.

Use only the hours that fall between <x> and <y> - Once the system has obtained the total number of "counted" hours for the week, you can instruct the system to use only a portion of those hours.

For example, if the system calculates a total of 31 counted hours and the settings instruct to include the counted hours between 25 and 100, the total number of counted hours used would be 6 because only 6 hours fall between 25 and 100 in the calculation. For more detail on this, see the examples at the end of this section.

Example 1: You want to accrue 8 hours of PTO at the end of each month.

This type of accrual is not based on hours worked so you would check the option 'Accrual is not based on hours worked during the week being closed' only. You will specify the amount of hours in the next section

Example 2: You want to accrue .5 hours of comp time for each overtime hour worked.

This type of accrual is based on hours worked so you would check 'Accrual is based on hours worked in the week being closed'. Since you only want overtime to be included in the counted hours, you would place a check in the Overtime 1 hours and Overtime 2 hours check boxes.

5.7.1.3. Accrual Period

7. Specify when the accruals should post. The Accrual Period screen is used to configure the posting period of the accrual. Depending on the accrual type selected in the previous Accrual Type dialog, different options will be enabled. Once configuration is complete on this dialog, click **Next** to proceed to the Accrual Options dialog.

Accrual Period

How often should this accrual be posted:

☐ Daily

☐ Weekly

☐ Monthly on the 1st day of the month.

☐ Monthly on hire date anniversary

☐ Yearly on 01/01

☒ Yearly on hire date anniversary plus 0 days.

NOTE: All accruals are posted when the current week is closed if the above criteria has been met during the week being closed.

< Back Next > Cancel Help

Daily – The accrual will be based on daily hours worked. Note that selecting this option will result in the entire accrual being processed seven times for each week that is closed.

Weekly – The accrual will be posted every time the week is closed.

Monthly on the <x> day of the month – The accrual will be posted on the date specified each month.

Monthly on hire date anniversary – The accrual will be posted on the same day of

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the month as the hire date of the employee. If the hire date falls on a day of the month that does not exist in the current month (e.g., the 31st in February), the accrual will be posted on the last day of the month.

Yearly on [date] – The accrual will be posted once a year on the date specified.

Yearly on hire date anniversary – The accrual will be posted once a year on the anniversary of the employee's hire date. The accrual will not be posted during the first week the individual is employed.



Accruals will be posted when the week containing the data is closed from TimeClock Manager. The accrual history will not update until the TimeClock week is closed.

5.7.1.4. Accrual Options

8. Set the remaining accrual rule posting options. This screen is used to specify what actions will be taken when the accrual is posted. Once this screen is configured, click **Next** to proceed to the Accrual Summary, or click **Back** to return to the Accrual Period to make any changes.

Process this accrual only if counted hours are equal or above - This accrual will only be posted if the number of "counted" hours as determined by Accrual Type settings is greater or equal to the number entered here. This option is only available if the accrual is based on hours worked.

Number of hours to accrue for each counted hour –This is the amount of hours to accrue for each "counted" hour determined by the settings in the Accrual Type

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section. For example, if an employee accrues 15 minutes of vacation for every counted hour, you would enter 0.25 into this text box.

Number of hours to accrue when accrual is posted – This is a fixed number of hours to accrue when this accrual is posted. If the accrual is based on hours worked, this amount will be added to the number of hours accrued for each counted hour.

Accrual is posted to what job code – You must specify which job code this Accrual Rule applies to, by clicking on the ellipsis (...) icon in this text box. This is the job code that relates to this accrual.
For example, if you are accruing sick time you would enter the sick job code in this field.

Start posting accruals after a set number of days since hire – With this option checked you can input a certain amount of days before the accrual rule will start to post.

For example: if your company assigns PTO time after 90 days, you can enter that number and the employees will not begin to accrue until 90 days past their hire date.

Stop posting accruals after a set number of days since hire – With this option checked you can input a certain amount of days before the accrual stops posting.

For example, if you would like one accrual for an employee to stop posting after 365 days so they can then earn an improved accrual.

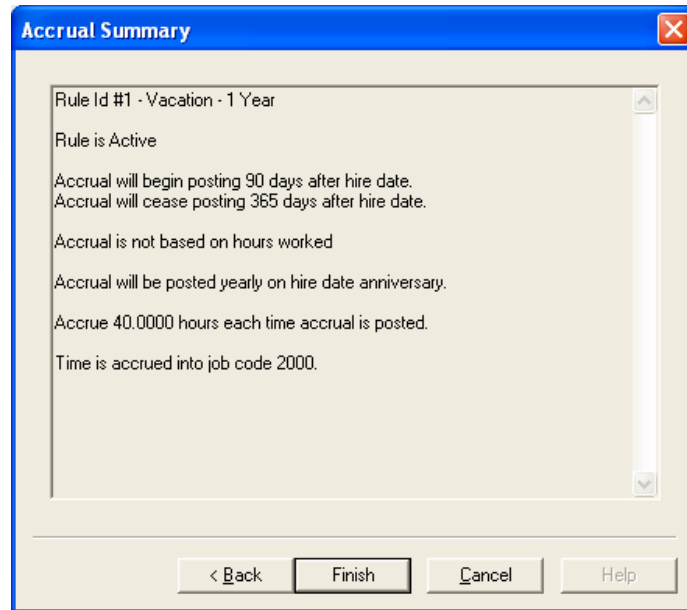
5.7.1.5. Accrual Summary

This screen displays summary information about the accrual rule that was created or edited. Look over the information displayed and verify that it is correct.

9. If the information is correct, click **Finish** to return to the Accrual Rule List. If it is not, click Back to correct any problems.



Once the Accrual Rule is created, it must be assigned to the employee. Refer to section Error! Reference source not found. for steps on how to assign an accrual rule to an employee.



5.7.2. To Delete an Existing Accrual Rule.

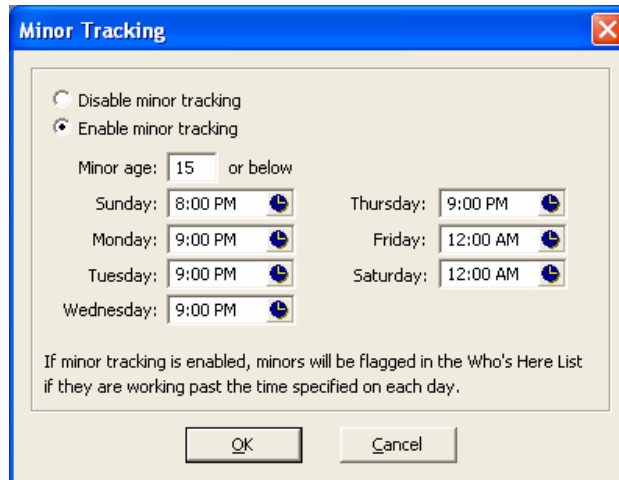
1. From TimeClock Manager, click on Configuration then Accrual rules.
2. Select (highlight) the rule you would like to remove.
3. Click the Delete button to remove the rule.



Once a rule is removed from the rules list it will also be removed from all employees. Rules should only be deleted if they are no longer needed.

5.8. Setting Minor Tracking Rules (Configuration > Preferences > Minor Tracking)

Some states have laws that do not allow minors to work past a certain time of day. If Minor Tracking Rules are established in the TimeClock Manager, a minor who is working past the specified time of day will be flagged in the "Who's Here List" for easy monitoring and management (they will display in a different color).



The image shows a 'Minor Tracking' dialog box with a blue title bar and a close button. It contains two radio buttons: 'Disable minor tracking' and 'Enable minor tracking'. The 'Enable minor tracking' option is selected. Below the radio buttons is a text field for 'Minor age' with the value '15' and the text 'or below'. There are seven time selection fields for each day of the week: Sunday (8:00 PM), Monday (9:00 PM), Tuesday (9:00 PM), Wednesday (9:00 PM), Thursday (9:00 PM), Friday (12:00 AM), and Saturday (12:00 AM). Each time field has a clock icon. At the bottom, there is a note: 'If minor tracking is enabled, minors will be flagged in the Who's Here List if they are working past the time specified on each day.' and two buttons: 'OK' and 'Cancel'.

1. Begin by clicking Enable minor tracking to enable the feature.
2. Input the age that your company/state defines as a minor in the edit box.
3. For each day of the week, enter the time of day to begin flagging minors that remain on the clock (in the Who's Here List).

To disable Minor Tracking simply select the Disable minor tracking selection.

5.9. Setting Up Supervisor Passwords for TimeClock Manager (Configuration > Preferences > Passwords)

This section is used to set up/maintain the passwords used by the Supervisor account to perform the four functions listed in the Passwords List.

Access Password – this is the password used by the Supervisor account to gain access to the TimeClock Manager and Scheduler applications.

Remote Data Terminal Restriction – this password is required to override a restriction as Supervisor from the RDT. Passwords to override as other users in TimeClock can be set in the user list.

TimeClock Restriction – this is the password used to override a restriction as Supervisor from the On-Screen TimeClock.

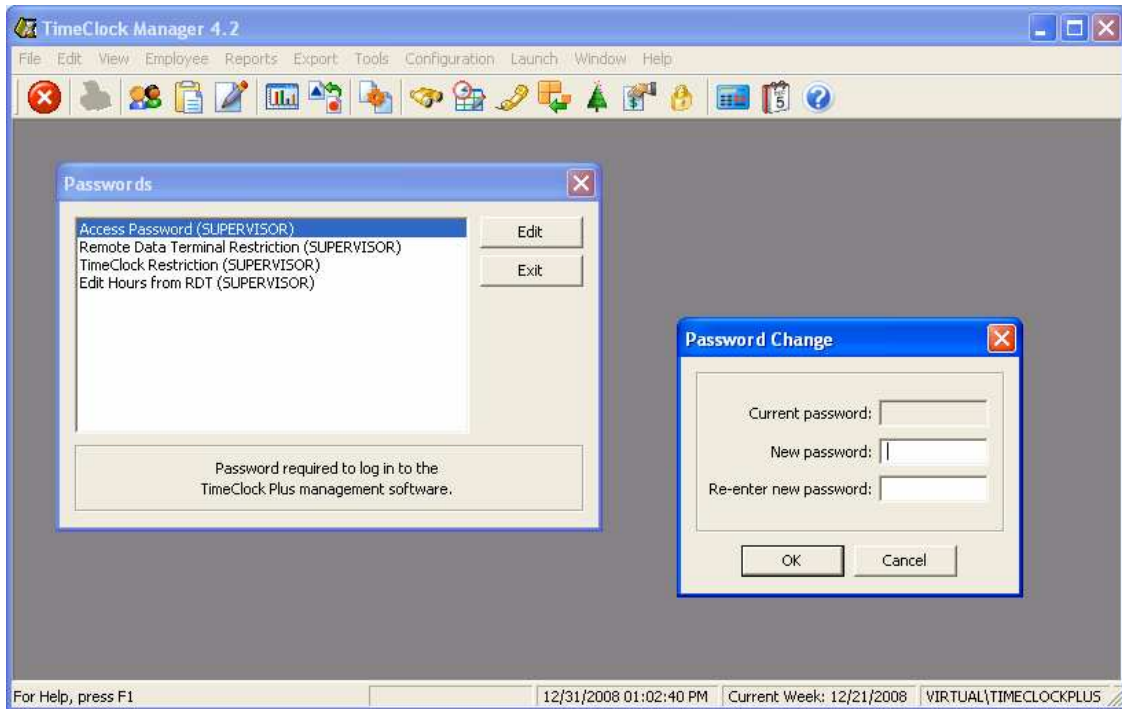
Edit Hours from RDT – this password is required to edit hours as Supervisor from the RDT(s).



The SUPERVISOR is pre-set with full access to all areas of TimeClock Plus.

5.9.1. To set or change a password:

1. Select the password you want to change from the list then press **Edit**. The Password Change screen will display.



2. If a password is already set for the item selected, enter it in the Current password edit box (if there is not a password currently set for this item, the current password box will be grayed out).
3. Enter the new password in the New password edit box.
4. Confirm the new password by entering it in the Re-enter new password edit box.
5. Click on the **OK** button to save the entry or click **Cancel** to discard your entry.

5.10. Setting Report Footers (Configuration > Preferences > Footers)

A footer appears at the bottom of all TimeClock Plus reports. This section is used to customize the standard footer including what will display and where it will be placed.

To set a standard footer you will input which field you wish to display on the Left Edge, Center, and Right Edge of the report footer from the field listing on the right hand side of the screen.

ID	Description
<DATE>	Date (MM/DD/YY)
<TIME>	Time (HH:MM PP)
<MONTH>	Month (January...)
<MONTHNUM>	Month (1,2,3,...)
<DAY>	Day (Monday...)
<DAYNUM>	Day (1,2,3,...)
<MHOUR>	Hour (0-23)
<HOUR>	Hour (1-12)

5.10.1. To configure the Report Footer:

1. Select which of the three options you wish to set up/edit by placing the cursor in the edit box for that location, being careful to place the cursor where you want the field to be placed (in front or after an existing field). To delete an existing field from the placement, place the cursor in front of the field and press the Delete key on your computer keyboard.
2. Next, scroll through the listing of fields on the right hand side of the Footer Editor screen and double click the field you wish to place where your cursor is in the footer.
3. Repeat the above steps for each of the three footer placement edit boxes. A Preview will display at the bottom of the Footer Editor box for you to review.
4. To save your settings press **OK**. To cancel your changes and return to the previous menu press **Cancel** (or press **Default** to return to the default footer settings provided with TimeClock Plus).

QUICK START – NEXT STEP: Setting up employees. Go to Section VI of this User Guide.

SECTION VI: GETTING STARTED ADDING AND MAINTAINING EMPLOYEES

This section of the user's guide provides instruction on all the processes related to managing your employee records. This includes adding a new employee, editing existing employee personal records, and options for removing employees from the system.

QUICK START – there are only four fields required in order to get employees clocking in/out quickly – they are Employee ID number, First Name, Last Name, (on the Employee Info tab) and Job Code (on the Employee Jobs tab). The rest of the employee personal data can be added later when time allows.

6. Adding and Maintaining Employees

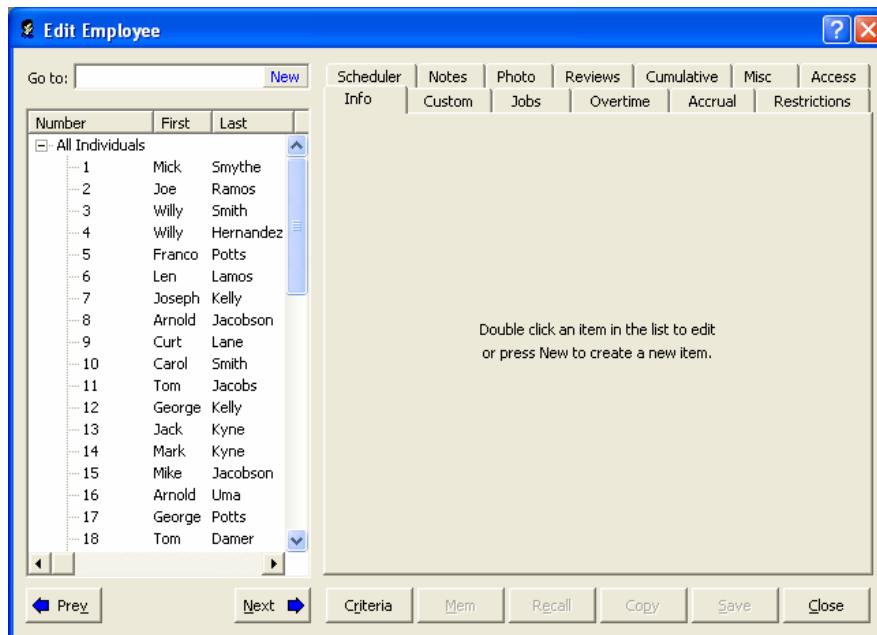
6.1. Adding New Employees

Before inputting employees, ensure that:

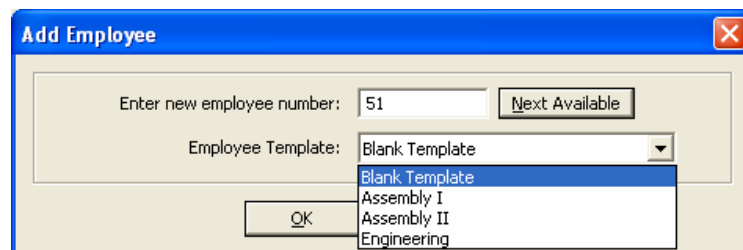
- ✓ **Your Job Code List is complete**
- ✓ **Any employee Default Information has been defined**
- ✓ **Any employee Templates have been established**
(Refer to Section 4-Getting Started for details on each of these items)

Employee data can be manually entered or it can be imported from an external file of ASCII or comma-delimited format. The manual input process is described in this section.

To begin manual input of employees, from the TimeClock Manager Main Menu select Employee, then select Add/Edit from the drop down menu.



1. On the **Edit Employee** Screen, click **New** to access the “Add Employee” box.



2. Input the Employee ID number as instructed and, if an Employee Template applies to this employee, select it from the template drop down menu (to automatically populate all fields previously configured for this template). The Edit Employee box will display with tabs of information specific to this employee.

There are only four fields of required information on these tabs – employee number, first name, last name and their available job code(s). Each of the tabs should be completed as follows, depending on the needs of your operation.



When entering/editing any information on an employee's personal record you must press the Save button on the bottom of the Edit Employee screen before closing. If the Cancel button is pressed before saving, all changes will be lost.

6.1.1. The **Info** Tab

The **Info** Tab is designed to contain all personal information for an employee such as name, address, phone, et cetera. The majority of this information is not required; this data can be displayed on many of the reports provided with TimeClock Plus. If you do not have this data stored in another software application we recommend that you input and maintain it here. To input data, press the tab key to move to the field you wish to edit and type in the requested information.



Fields can be marked as required in the system defaults under Employee Entry (refer to section 5.2 for setting defaults).

Most fields on this tab ask demographic information; however, a few fields in the Other Information section track additional information for that individual.

Hire Date – while this is an optional field, it is recommended that you populate it with the employee's actual hire date to allow TimeClock Plus to automatically set and remind you of the employee's first review date.



A review will only be scheduled when the individual is first added through the Add/Edit screen with a valid hire date. If the hire date is added at a later date, their initial review will not be scheduled.

Termination Date – if a termination date is entered in this field, the employee's data will be maintained in the system but they will not be able to clock in after the termination date. This permanently terminates an employee. In order to reactivate the employee, the Termination Date should be removed (see instructions regarding the Individual is Suspended checkbox below).



You can filter criteria based on employees that have been marked as terminated with a termination date. This allows you to only view employees that are not terminated.

Class: – this is an optional, multi-purpose field (numeric only). It is designed for use in grouping employees for reporting, editing, and/or control purposes via the Criteria Function (see Section 4.5 for more information on Criteria). For example, if a company has multiple physical locations, employees at corporate headquarters might be given classification code "1", while employees in an out of state location might be given classification code "2". Functions within the system, and reports, could then be filtered to only include employees in classification code "1", et cetera.

Dept: – this is an optional field (alphanumeric). Data can be selected from the field's drop down menu. Entries can be added to the drop down menu on the fly by typing them into this field. The 'Dept' field can be used to designate which department this employee is in.



Once a new Dept has been added, it will become available for future use in the drop down list.

Badge: – this is an optional field (alphanumeric). If the employee's badge number is different than their employee ID number, their badge number should be entered in this field. In addition, the appropriate Badge Search Order setting should be enabled on TimeClock Defaults (see section 5.4.2 regarding this setting). If no badge number is entered, the employee can only clock in/out by their employee ID number and, if they are using a badge, this badge must reflect their employee ID number.

Export Code: – if you will be exporting data from the TimeClock Plus system to any other application (or file) this field must be populated. Determine the contents of this field as follows (for more information on exporting data see Section 9.5 of this manual):

- If the employee has a different ID number in the system to which you are exporting data, that employee ID number should be entered in the export code field.
- If both systems use the same ID number for each employee, the common ID number should be entered here.

Network Id – The Network Id field allows you to specify the network login information for a specific employee. If you enter that employee's network login information and you enable the option in the On-Screen TimeClock, on the **Options** tab, 'Determine employee id using network id', when using the On-Screen TimeClock, TimeClock will determine what your employee number is by who you logged on to the network as.



In order for TimeClock to use the Network Id field, you must enable the option in On-Screen TimeClock to 'Determine employee id using network id'.

Individual is Suspended – if this option is checked an employee is considered suspended and can no longer clock in or out of the system. The employee will remain in the system as suspended and can be excluded from all drop down menus; however, their historical data is not deleted ("Deleting" an employee results in the loss of their historical data). Suspending an employee also makes it easy to allow them to clock in/out again if/when they return to work. (See Section 6.3 for more information on Terminating, Suspending, or Deleting an employee).



You can filter the criteria based on the suspended status. That allows you to only view the employees that are not marked as suspended.

Custom

This tab is used to input data to the Custom, or user-defined, employee fields in TimeClock Plus. Available custom fields will display in the “Field” column.

[illegible]

To input data for an employee into custom fields, double click on the line item and type in your input to the “Value” column (or make a selection from the drop down menu displayed if this custom field was established as an Item List type).

Jobs Ta

This tab is used to establish a default pay rate and all job codes that this employee is eligible to use, both clockable and non-clockable. Job codes will display in a grid format with checks under each column that applies to a particular job code (clockable, earns overtime, counts toward overtime, et cetera). At least one clockable job code is required for each employee.



If you added an employee using an Employee Template this grid will populate with information from that template.



Check the Active only box if you wish for the grid to only display “active” job codes for this employee.



Check the Use Short Titles box if you wish for the grid titles to be abbreviated for less scrolling left to right.

Default pay rate: – This allows you to specify a default rate for this employee for all of their job codes. This rate can be overridden by entering a rate for each individual job code.



If you will be calculating overtime based on a “best of” situation (e.g. Best of Weekly vs. Daily, Best of Bi-weekly vs. Daily), you will need to have either a Default pay rate entered or an individual job code rate entered. Without a default pay rate or an individual job code rate for an employee, the system cannot calculate overtime based on “best of” for the employee.

There are four job code related functions to perform – add a job code, edit a job code, delete a job code, and raise the rate of a job code. These functions are performed as follows:

6.1.3.1. Adding a Job Code

1. To Add a job code to an employee, click the **Add** button. This will launch the Edit Job Code dialogue box.
2. Complete these tabs as follows;

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Information Tab

This tab is used to select a Job Code to be added and define pay rates and calculations associated with it.

The screenshot shows the 'Edit Job Code' dialog box with the 'Information' tab selected. The dialog has four tabs: 'Information', 'Tracked Fields', 'Custom', and 'Accruals'. The 'Job Code' field is empty with a dropdown arrow and a 'New Code' button next to it. The 'Description' field is empty. Below these are sections for 'Pay Rates' and 'Calculations'. In the 'Pay Rates' section, 'Use individual's default rate' is selected. In the 'Calculations' section, 'Code is active (must also be active in Master Job Code List)', 'Code is clockable', 'Code counts toward overtime', and 'Code earns overtime' are checked. 'Job is default job for individual', 'Force overtime 1 for this code', and 'Force overtime 2 for this code' are unchecked. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Job Code – Access the Job Code list by pressing the drop down menu button to the right of the edit field. (Note: you can also add a new job code to the Master Job Code list from this screen by pressing the **New Code** button to the right of the Job Code field).

Description – This field is used to easily identify the Job Code. For example, the description can be a department name such as Office or something more specific such as Hourly Receptionist.

Pay Rates

Use default rate – if selected, the default rate for this job code will be used (maintained on the employee **Jobs tab**).

Specify rate for this job code – if you do not want to use the default rate for this employee, select this item and enter the employee's hourly wage for this job in the "Rate" field.

Calculations

Code is active (must also be active in Master Job Code List) – if checked, this job code is "active" for this employee.

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Code is Clockable – If checked, this Job Code is clockable for this employee and they can clock in/out using this Job Code.

Code Counts Toward Overtime – If checked, it specifies that any time worked on this Job Code will count towards the overtime amount set on the employee overtime tab.



Some hours worked may count toward an employee's overtime but not actually earn overtime. This check box is used to specify this for a particular job code. The next check box should not be enabled in order to specify this treatment of hours for this job code – uncheck the "Code earns overtime" box and this box then becomes available for entry.

Code Earns Overtime – if checked, hours worked under this job will earn overtime and will count toward overtime (as designated by the previous line item being automatically enabled when this line item is checked).

Job is default job for individual – if checked, this job code will be used to collect this employee's time unless a Job Code Change is performed.

Force Overtime1 (Overtime 2) for this Code – if checked, *all* time worked under this job code will be treated as Overtime (either type 1 or 2).

Tracked Fields Tab

This tab is used to designate whether any (or all) of the three available Tracked Fields will be utilized with this Job Code for this employee. (Tracked Fields were established via Configuration > Preferences > Defaults > System Wide Settings > Tracked Fields).

Edit Job Code

Information | **Tracked Fields** | Custom | Accruals

Require entry of tips: Disabled

Require entry of pieces: On Clock Out

Require entry of parts: Disabled

Disabled - Tracked field entry for this job code will not be allowed from any client or management application.

Manager entry only - Tracked fields are only entered by a manager through the management software.

On clock in - The individual will be asked to enter this field when clocking in.

On clock out - The individual will be asked to enter this field when clocking out.

On clock in and out - The individual will be asked to enter this field when clocking in and will be allowed to edit that entry when clocking out.

OK Cancel Help

From the drop down menu alongside each Tracked Field, select the rule that applies for this Tracked Field, for this Job Code, for this Employee – as follows:

Disabled – no tracked field information is required.

Manager entry only – entry of tracked field data can only be performed by a manager (via the TimeClock Manager application).

On clock in – the employee will be asked to enter the tracked field data upon clock in.

On clock out – the employee will be asked to enter the tracked field data upon clock out.

On clock in and clock out – the employee will be asked to enter the tracked field data when clocking in *and* when clocking out.



If you enter Tracked Field 1 when clocking in, and enter Tracked Field 1 again when clocking out, it will override the amount that was entered when clocking in.

Custom Tab

This tab is used to configure data to the Custom, or user-defined, employee fields in TimeClock Plus. Available custom fields will display in the “Field” column. To configure data for this job code, double click on the line item and type your data in the

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“Description” column (or make a selection from the drop down menu displayed if this custom field was established as an Item List type).



If you are exporting to a payroll software, and you want to override the default Job Code settings setup in the Master Job Code List, this is where you would enter your override information such as Earnings Codes, Pay Buckets, Pay Codes, etc.

Accruals Tab

This tab is used to establish accrual reset and caps for this Job Code, for this employee.

Accrual Reset

Select the rule for resetting the employee’s accruals for this Job Code:

Do not automatically reset accruals to this job code – should be selected if carryovers are permitted and accrual balances are not reset to zero at any time.

Reset accruals to this job code on the individual’s hire date anniversary – should be selected if an employee loses their accrual balance each year on their hire date anniversary.

Reset accruals to this job code on a specific date – should be selected if an employee loses their accrual balance on a specific date each year.

On reset date, the accrual remaining resets to XX – This option allows you to reset the accrual total to a specified amount, rather than resetting completely

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back to 0.00. For example, when the accrual is reset, you can have it reset to 10 hours, instead of all the way back to 0. This option becomes available when you reset accruals on either the hire date anniversary or on a specific date. If the employee has less than the reset amount, then no changes are made and it will not give you hours during a reset.

Accrual Caps

If accruals to this Job Code, for this Employee, should be capped, activate the Cap accruals to this job code box by placing a check mark in it. Complete the definition of the accrual cap rule by designating whether the cap is based on hours accrued or hours remaining and for what period of time.

Hours accrued – This specifies that the caps will be based on the total amount of accrued time that was earned during the period.

Hours remaining – This specifies that the caps will be based on the total amount of accrued time that is still available, after deductions.

Cease accruing hours if hours exceed – This is where you specify to stop accruing hours after they have accrued XX hours. For example, if an employee only gets 40 hours of accrued time for this job code, you set the field to cease accruing hours if hours exceed 40.

In what period – This specifies what period you want to track caps with this specific accrual.

Once all of the tabs on the Edit Job Code screen have been completed for this job code, for this employee, press **OK** to save (or **Cancel** to exit without saving your input).

6.1.3.2. Editing a Job Code

1. To Edit a job code for an employee, click on the job code to select it (it will highlight) then press **Edit**.
2. The Edit Job Code screen will display. Make any required changes to the provided tabs then press **OK** to accept your changes (or **Cancel** to return it to previous settings).

6.1.3.3. Deleting a Job Code

1. To Delete a job code from an employee, click on the job code to select it (it will highlight), then press **Delete**.
2. You will be asked if you are sure you wish to delete the selected job code, select either **Yes** to complete the deletion or **No** to cancel the deletion.



It is recommended that you deactivate Job Codes instead of deleting them. This allows you to retain the information pertaining to that particular code.

6.1.3.4. Providing a Raise for an Employee (by Job Code(s))

The TimeClock Plus system will keep a history of hourly wage changes for each employee, by job code, along with comments about the raise and an effective date.

1. To provide a raise to an employee, press the **Raise** button, at which time the Rate Change screen will display.



Job Codes set to use default rate are not displayed.

2. Select the job code(s) that will be affected by the rate change then input the new rate of pay, effective date, and any comments about the rate change (to select more than one job code hold down the CTRL key while selecting the job code from the table).
3. Once input is complete, press **OK** to accept the change (or **Cancel** to return the previous settings).

6.1.4. The **Overtime Tab**

The **Overtime** Tab is used to designate overtime rules for an employee. This determines how overtime is calculated and has nothing to do with pay frequency (for example, You may pay all employees weekly overtime on a semi-monthly pay frequency).

TimeClock Plus allows for the calculation of two overtimes if required. For example, your company may pay time and a half for hours worked between 41 and 60, and double time for any hours worked over 60.



Company-wide defaults can be used for an employee's overtime rules by checking the "Use Default Information" box

6.1.4.1. Overtime Calculations

From the drop-down box, select the method used to calculate overtime for this employee, there are 8 options available:



Remember that either of the “Best of” methods requires the entry of either a default rate or a job code rate for the employee – in order for the best overtime method to be calculated.

Best of Bi-Weekly vs. Daily – the system will calculate overtime on a daily and bi-weekly basis for the employee. Overtime will be based on the higher of the two overtimes.

Best of Weekly vs. Daily – the system will calculate overtimes on a daily and weekly basis for the employee. Overtime will be based on the higher of the two overtimes.

Bi-Weekly – overtime for employees is based on X hours worked over a 14-day work period.

Both Daily and Bi-Weekly – the system will calculate overtimes on a daily and bi-weekly basis for employees. Total overtime will be a sum of daily overtime plus weekly overtime.

Both Daily and Weekly – the system will calculate overtimes on a daily and weekly basis for employees. Total overtime will be a sum of daily overtime plus weekly overtime.

Daily Overtime – overtime for employees is based on an X hour work day.

Salaried – this flags an employee as being salaried. However, if selected, an option is available to enter the salaried amount per year for this employee in the Overtime Settings section of the screen. This amount will be used in calculating labor cost for a week. This allows you to track overtime for salaried employees.

Weekly Overtime – overtime for employees is based on an X hour work week.



To ensure biweekly OT is calculated correctly, the biweekly base date must be correctly set up in the Quick Setup Wizard, and pay rates must be entered for all job codes. If you need to check or change the biweekly base dates, you can run the Quick Setup Wizard again or change them in TimeClock Manager Defaults.

Individual also earns salaried amount – if checked, this allows an individual who has been marked as salaried to also be able to track overtime hours.

Ignore regular hours for this individual – if checked, this allows you to only report or export overtime hours for this individual when you run a report or export.

Overtime Multipliers

In the two input boxes enter the multipliers you use to calculate overtime for this employee (e.g., 1.5 equals time and a half and 2.00 equals double time).

Overtime Settings

This section is used to set the number of hours an employee must work in a period to qualify for overtime. Overtime Settings change as you toggle between the Overtime Calculations options (via drop down menu), allowing you to enter the number of hours required for each type.

If a Salaried Overtime Calculation was selected, an option is available to enter the salaried amount per year for this employee. This amount will be used in calculating labor cost for a week.

The Advanced Button

The Advanced Button will take you to a window that allows you to set Holiday Pay and/or Seventh Consecutive Day Overtime Rules for this employee.

6.1.4.2. Holiday Pay



In order for an employee to receive Holiday Pay the holiday must be set up in the Holiday Calendar of TimeClock Plus and hours have to be entered for that holiday either by an employee or manually by a manager.



Refer to Section 5.6 of this manual for information on the configuration of the Holiday Calendar).

Advanced Overtime Settings

Holiday Pay

On days marked in the system as holidays, how is overtime calculated:

- ☐ No special action for these days
- ☐ Override current overtime calculations
 - Overtime #1 after 0:00 hours in the day.
 - Overtime #2 after 0:00 hours in the day.
- ☒ Pay a shift premium of 2.00 dollar(s) per hour.

Seventh consecutive day overtime

On the seventh consecutive day worked, how is overtime calculated:

- ☒ No special action for these days
- ☐ Override current overtime calculations
 - Overtime #1 after 0:00 hours in the day.
 - Overtime #2 after 0:00 hours in the day.
- ☐ Pay a shift premium of 0.00 dollar(s) per hour.

OK Cancel

If you calculate overtime differently for a day designated as a “holiday”, select the option Override current overtime calculations. This will make available the two input boxes for the number of hours that have to be worked for the holiday to qualify for Overtime 1 or Overtime 2.

Example – If you want to pay overtime all day on a holiday you would set this option to pay Overtime 1 after 0.00 hours per day. If you want to pay Overtime 2 after 8 hours on a holiday you would set it for overtime 2 after 8.00 hours.

If you pay a shift premium for hours worked on a designated “holiday”, select the option Pay a shift premium of X dollar(s) per hour and enter the amount paid per hour.

Example – If an employee is configured to earn \$2.00 per hour premium pay for hours worked on holidays and the employee is clocked in under a job

code which pays \$8.00 per hour, the employee will earn \$10.00 per hour for hours worked on the holiday.

6.1.4.3. Seventh Consecutive Day Overtime

If overtime is calculated for the seventh consecutive day worked, select the option Override current overtime calculations. This will make available the two input boxes for number of hours that have to be worked for the seventh consecutive day in order to qualify for Overtime1 or Overtime2.

If you pay a shift premium for hours worked on the seventh consecutive day, select the option Pay a shift premium of X dollar(s) per hour and input the amount paid per hour on the seventh consecutive day.

6.1.5. The **Accrual** Tab

The Accrual Tab is used to assign accruals for sick, vacation, etc. to an employee. During the Add process accruals can be selected from the pre-established Accrual Rules or they can be added on-the-fly.



*Remember, Company-wide defaults can be used for accrual rules by checking the “Use Default Information” box on an employee’s **Accrual** tab.*

Number	First	Last
1	Mick	Smythe
2	Joe	Ramos
3	Willy	Smith
4	Willy	Hernandez
5	Franco	Potts
6	Len	Lamos
7	Joseph	Kelly
8	Arnold	Jacobson
9	Curt	Lane
10	Carol	Smith
11	Tom	Jacobs
12	George	Kelly
13	Jack	Kyne
14	Mark	Kyne
15	Mike	Jacobson
16	Arnold	Uma
17	George	Potts
18	Tom	Damer

Rule Id	Description	Active
1	Vacation - 1 Year	Yes

6.1.5.1. Assigning an accrual rule to an employee

1. Click the **Add** button on the **Accrual** Tab.
2. Click the drop down box designation next to the Accrual Rule ID edit box to access a list of available accrual rules.



*Before accrual rules can be assigned to an employee they must be created in TimeClock Plus via the Configuration Menu, Accrual Rules selection. Accrual rules can be added from the employee Accrual tab by clicking the **New** button, taking you to the Accrual Add process.*

1. Select the accrual rule you wish to apply to this employee from the drop down box by double clicking it.
2. If additional rules need to be added, double click those to add them as well. All accrual rules applied to an employee will display on this screen.

6.1.6. The **Restrictions** Tab

The **Restrictions** Tab is used to set rules for this employee for rounding punch times (to the quarter hour for example) and restricting clock in operations based on number of hours worked in the work week.



Company-wide defaults can be used for clock in/out restrictions by checking the "Use Default Information" box on this tab.

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6.1.6.1. Auto Rounding (No Schedule Required)

Often companies have a policy that requires that in and out times are automatically rounded to the nearest X minutes, backwards or forwards. This feature will automatically round an employee's clock in or out times, up or back, without the need for a schedule. To enable the auto rounding feature:

1. Begin by placing a check in the Clock In or Clock Out box on the Restrictions Tab.
2. Next, enter the number of minutes you want to round to in the To nearest X minutes input box (for example, enter '15' if you want to round up to the next quarter hour, or back to the last quarter hour).
3. Next, enter the number of minutes you want to round up from in the Round up at X minutes input box. (for example, enter '8' if you want to round up to the next quarter hour if an employee is clocking in at/after 8:08, 8:23, 8:38 or 8:53. So the employee would clock in to the nearest 15 minutes, rounding up at 8 minutes. So if an employee clocks in at 8 minutes after, their time will be rounded up to the next quarter hour).

6.1.6.2. Clock In Restrictions

This feature will prevent employees from clocking in if they reached overtime or a specified number of hours **on their previous clock out**. One or both operations can be used.



This will only restrict a clock in operation. If an employee reaches overtime while clocked in, they can continue to work. The system will restrict them when they try to clock in after hitting the hours mark specified.



For additional help managing overtime, use the Approaching Overtime Report to monitor hours in real-time.

Restrict clock in when individual reaches overtime – If checked, this option allows you to restrict someone from clocking in if they reached overtime on their last shift worked.

Restrict clock in when individual reaches X hours in the work week – If checked, this option allows you to restrict someone from clocking in once they have worked a designated number of hours in the week. Once checked, you can input the number of hours in the input box.

6.1.7. The Scheduler Tab

The Scheduler Tab has two purposes:

- ✓ restricting clock in/out for an employee based on their schedule
- ✓ rounding an employee's clock in/out to their schedule



Both of these operations require a schedule for the employee in the integrated TimeClock Plus Scheduler application.



Company-wide defaults can be used for restrictions to schedule by checking the "Use Default Information" box on this tab.

If an employee attempts to clock in/out outside the parameters set on the Scheduler Tab, they will not be allowed to do so without a manager's approval.



Rounding takes place *before* schedule restrictions are applied. For example, if you round early clock in within 15 minutes of their scheduled time *and* restrict early clock in outside 10 minutes, the restriction will never be used because the time will always be rounded to the scheduled time.

Edit Employee- Carol Smith (10)

Go to: 10 [New](#)

Scheduler Tab

Approval Required For (Schedule required)

- ☒ Early Clock In Outside 30 minutes.
- ☐ Late Clock In Outside 0 minutes.
- ☐ Early Clock Out Outside 0 minutes.
- ☒ Late Clock Out Outside 15 minutes.

Round to Schedule

- ☒ Round clock in time to scheduled clock in time when clocking in up to 15 minutes early or 15 minutes late.
- ☒ Round clock out time to scheduled clock out time when clocking out up to 15 minutes early or 15 minutes late.

[Test](#)

☐ Use default Information

[Prev](#) [Next](#) [Criteria](#) [Mem](#) [Recall](#) [Copy](#) [Save](#) [Cancel](#)

6.1.7.1. Approval Required for (Schedule Required)

This section is used to designate how many minutes early or late an employee can clock in or out without manager approval. To set any or all of these four restrictions, place a check in the box next to the restriction you want to activate and enter the number of minutes they cannot exceed.

Early Clock In, Outside X minutes – if enabled, this option will prevent an employee from clocking in more than X minutes ahead of their scheduled start time, without manager approval.

Late Clock In, Outside X minutes – if enabled, this option will prevent an employee from clocking in more than X minutes after their scheduled start time, without manager approval.

Early Clock Out, Outside X minutes – if enabled, this option will prevent an employee from clocking out more than X minutes ahead of their scheduled stop time, without manager approval.

Late Clock Out, Outside X minutes – if enabled, this option will prevent an employee from clocking out more than X minutes after their scheduled stop time, without manager approval.

6.1.7.2. Round to Schedule

This section is used to automatically round an employee to their scheduled clock in and out times, for those organizations paying to schedule.



Rounding takes place *before* schedule restrictions

Round clock in time to scheduled clock in time when clocking in up to X minutes early or Y minutes late – if enabled, this option will round the employee's clock in time to their schedule if they are up to X minutes early or Y minutes late. If they are outside the X and Y parameters, their actual clock in time will be recorded.

Round clock out time to scheduled clock out time when clocking out up to X minutes early or Y minutes late – if enabled, this option will round the employee's clock out time to their schedule if they are up to X minutes early or Y minutes late. If they are outside the X and Y parameters, their actual clock out time will be recorded.

Once "Round to Schedule" restrictions have been added for an employee they can be testing by pressing the **Test** button on the bottom of this tab. The **Test Schedule Rounding** screen will display which allows you to simulate how a clock in or clock out will be treated based on the rounding and schedule restrictions you have established.

Test Schedule Rounding

To test the rounding settings for a particular date and time, enter the date and time in the space below and click Test.

Date: 11/11/2008 Time: 3:55 PM ☐ In ☒ Out

Test Results

Action
 Simulating clock out at 11/11/2008 03:55 PM

Effective settings
 Auto Rounding: Nearest 15, up at 8
 Round to schedule: 5 minutes early, 10 minutes late
 Restrict early operation: Disabled
 Restrict late operation: Disabled

Processing Auto Rounding
 Time rounded to 11/11/2008 04:00 PM

Processing Round to Schedule
 The time was not rounded to schedule.

Processing Schedule Restrictions
 No schedule restrictions.

The resulting clock out time is 11/11/2008 04:00 PM

1. Enter the date you wish to perform the simulation for in the Date: field.
2. Enter the clock in or clock out time you wish to test in the Time: field and enable either In or Out to designate whether you want to test this time as a clock in or clock out.
3. Press the **Test** button.
4. Results of the test will display on the screen for rounding to schedule, auto rounding and schedule restrictions for this employee. If expected results do not display, press **Close** and return to the Restrictions and Scheduler tabs to change your settings.

6.1.8. The **Notes** Tab

The Notes Tab contains a free-form data entry field that can be used for keeping notes of many types about an employee (e.g., test dates and scores, certifications they hold, names of their children).

Number	First	Last
1	Mick	Smythe
2	Joe	Ramos
3	Willy	Smith
4	Willy	Hernandez
5	Franco	Potts
6	Len	Lamos
7	Joseph	Kelly
8	Arnold	Jacobson
9	Curt	Lane
10	Carol	Smith
11	Tom	Jacobs
12	George	Kelly
13	Jack	Kyne
14	Mark	Kyne
15	Mike	Jacobson
16	Arnold	Uma
17	George	Potts
18	Tom	Damer

Entry of the data into the Notes field functions similar to a word processor, allowing you to type text in **Bold**, *Italics* or Underlined. The color of the text can also be changed. To change the color, highlight the text you wish to color and press the button containing the red, green, and blue bars. To print the contents of the Notes field for an employee, click on the printer icon.

6.1.9. The **Photo** Tab

The Photo Tab can be used to store a photograph of an employee. This tab supports images in almost any image format.



This has become a popular feature with companies as concerns about security have increased. Some companies provide access to this portion of the system only for their receptionist and/or front desk security personnel so they can verify identities as employees arrive/depart the work place.

6.1.9.1. Adding a photo

To add a photo, press the button which resembles an open folder. This allows you to browse to the photo or image you would like to add for this particular employee. You

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open the image and it is added to the photo tab. The other two buttons on the **Photo** Tab are used for undoing any changes and removing the photo. The scissors remove the photo.



When you add the image, a copy is created and stored in the database, so that if you were to remove the original image file, the photo is still available in TimeClock Plus.

6.1.10. The **Reviews** Tab

The **Reviews** Tab is used to store and maintain information about an employee's reviews, both scheduled and non-scheduled. TimeClock Manager includes a "Scheduled Reviews" Report which can be printed on demand, for a specified period, to help the user better manage reviews. In addition, if hourly wages and rate increases are input into the TimeClock system, the Reviews Tab can be used to store information relevant to increases based on reviews.

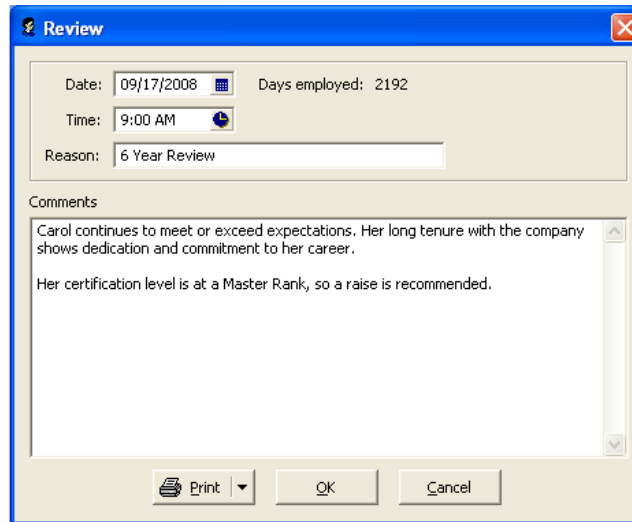


If a valid hire date is entered at the time an employee is added to the system, the system can automatically calculate their first review (if this was established during configuration of defaults). This initial review date will display in the Next Scheduled Review field on this tab.

Date	Time	Reason for Review
03/17/2003	9:00 AM	6 Month Review
09/17/2003	9:00 AM	1 Year Review
09/17/2004	9:00 AM	2 Year Review
09/17/2005	9:00 AM	3 Year Review
09/17/2006	9:00 AM	4 Year Review
09/17/2007	9:00 AM	5 Year Review
09/17/2008	9:00 AM	6 Year Review

6.1.10.1. Adding a Review

1. To add a review to the schedule, press the **Add** button on the Reviews Tab. The Review screen will display.



Review

Date: 09/17/2008 Days employed: 2192

Time: 9:00 AM

Reason: 6 Year Review

Comments

Carol continues to meet or exceed expectations. Her long tenure with the company shows dedication and commitment to her career.

Her certification level is at a Master Rank, so a raise is recommended.

Print OK Cancel

2. Enter the date and time the review is scheduled for, a reason for the review and any comments relevant to the review. To accept the entry, press the **OK** button (or **Cancel** to exit without accepting the new review record).
3. You can also add a review in real-time (non-scheduled) in order to maintain notes on all reviews performed in one central location.

6.1.11. The **Cumulative** Tab

The Cumulative Tab provides a great deal of attendance, accrual, raise, and message history information on one screen.



Information displayed on the Cumulative Tab is updated with the Close Week Process.



All Tardies and Absences are based on the employee schedule that was developed in the TimeClock Plus Scheduler application. If no schedule exists, these fields will be blank.



The system uses user-defined rules to determine when an employee is considered absent or tardy. This information is set from the Scheduler configuration in the TimeClock Plus Defaults (accessed via Configuration > Preferences > Defaults > Scheduler section).

6.1.11.1. Tardy Statistics – This section presents the total number of times the employee has been tardy, and if any tardies were noted as excused. Press the **Detail** button to display more detailed information on each of the tardies and any notes relevant to them. The Detail screen is also where you add a tardy record, edit an existing tardy record (for example, to mark an individual tardy as “excused”), remove the record or print the details.

6.1.11.2. Absent Statistics – This section is similar to the Tardy Statistics section except that all information here is provided about absences. Absences are defined as when an employee did not work an assigned shift. The Detail screen allows you to Add, Edit, Remove, or Print details about absences for the employee.



For TimeClock to track Tardies and Absences, a schedule must be set up in TimeClock Scheduler for the period specified.

The screenshot shows a Windows-style dialog box titled "Edit Detail". Inside the dialog, there are four labeled text boxes: "Date:" with the value "12/29/2008", "Time In:" with the value "9:00 AM", "Time Out:" with the value "5:00 PM", and "Reason/Description:" with the value "Family illness.". Below these text boxes is a checkbox labeled "This Absence/Tardy is excused" which is currently checked. At the bottom of the dialog are two buttons: "OK" and "Cancel".

6.1.11.3. Viewing Historical Data

The remainder of this tab provides the user with the ability to observe Regular and Overtime Hours by Job Code for the employee. The drop down menu is used to designate which period of time to display on the job code grid (this week, last week, last year, month to date, year to date, et cetera). To display job code details on the screen:

1. Select the period of time from the drop down box
2. Press the **Update** button
3. To print the data displayed press the **Print** button

Across the bottom of the **Cumulative** tab are three buttons that provide access to more details about the employee’s accrual and raise history, and a history of messages that have been sent to and read by the employee. To access these details press one of the buttons:

6.1.11.4. Accrual History Button

The Accrual History screen has two purposes:

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- ✓ Viewing hours accrued or taken to date
- ✓ Manually inputting hours accrued or taken (for example, inputting beginning balances for Sick Time)

When viewing the Accrual History, each Job Code that has Accrual History is shown on a different tab, so choose the tab for the Job Code you would like to view.

Each record includes the date it was posted, number of hours accrued, number of hours taken, the excess used hours (when you have accrual caps, these are the hours accrued above the accrual cap. It is for tracking purposes only), whether this record was manually entered (vs. calculated by the TimeClock Plus accrual process), if the accrual information was imported, and if any adjustments were made for accrual resets.

To manually enter a record for hours accrued or taken:

1. Press the **Add** button and enter the Date Posted, Job Code and Amount Accrued, Amount Taken, or Accrued over limit amounts.
2. Press **OK** when input is complete to accept it (or **Cancel** to exit the Add process without saving the input).



Reports containing accruals recorded/taken are provided in the Pay Periods Report Grouping under Accruals.

6.1.11.5. Raise History Button

The Raise History screen provides details on pay raises, by job code, for the employee (raises are given to employees from their **Jobs tab**, and the Raise button).

6.1.11.6. Message History Button

The Message History screen provides detail on all messages that have been sent to this employee. It includes the Date and Time Sent, Date and Time Read by the employee, and the actual text of the message. Message History for an employee can be printed once displayed by pressing the **Print** button on the bottom of the screen.

6.1.12. The **Miscellaneous** Tab

The Miscellaneous Tab is used to provide additional detail about this individual and any approvals required for his/her time.

Number	First	Last
1	Mick	Smythe
2	Joe	Ramos
3	Willy	Smith
4	Willy	Hernandez
5	Franco	Potts
6	Len	Lamos
7	Joseph	Kelly
8	Arnold	Jacobson
9	Curt	Lane
10	Carol	Smith
11	Tom	Jacobs
12	George	Kelly
13	Jack	Kyne
14	Mark	Kyne
15	Mike	Jacobson
16	Arnold	Uma
17	George	Potts
18	Tom	Damer

Options

- ☐ Shifts must be approved by manager before closing week or exporting
- ☐ Shifts must be approved by individual before closing week or exporting
- ☐ Always use default job code when clocking in

Punch Pin Number

If a value is entered into this field the individual will be required to enter this value in addition to an id number when performing a clock operation.

Pin number:

6.1.12.1. Options

This section of the screen is used to designate whether any approvals of shifts/time are required for this employee.

Shifts worked must be approved by a manager before week can be closed – If checked, all shifts for this employee must be approved by a manager before the week can be closed. This approval is performed via Edit Hours or the Approval Manager.

Shifts worked must be approved by this individual before the week can be closed – If checked, all shifts for this employee must be approved by the employee before the week can be closed. This approval is performed via Edit Hours or the View Hours Process provided by the On-Screen TimeClock.



All required approvals must be completed before the Close Week Process is started.



See Section 9.2 for more information on the Approval Manager.

Always use default job code when clocking in – if checked, the system will clock an employee in using their default Job Code without prompting them to choose it.

Pin number – if entered, this number will have to be entered when an employee begins an operation in On-Screen TimeClock (e.g., when clocking in or out).

6.1.13. The **Access** Tab

This tab is used to designate which TimeClock Users have access to this employee's personal information, and whether it's through Universal or Individual access.

Go to: 10 [New](#)

Info Custom Jobs Overtime Accrual Restrictions
Scheduler Notes Photo Reviews Cumulative Misc **Access**

The following users have access to this individual:

Access	UserId	Name
<input checked="" type="checkbox"/>	CBARTHOW	Connie Barthow
<input type="checkbox"/>	HJACOBS	Heather Jacobs
<input checked="" type="checkbox"/>	TJOHNSON	Tom Johnson

☒ Granted universal access ☐ Granted individual access

Manager
Individual's Manager: CBARTHOW-Connie Barthow

[Prev](#) [Next](#) [Criteria](#) [Mem](#) [Recall](#) [Copy](#) [Save](#) [Close](#)

Universal access is determined via the User List settings (Configuration > User List). Individual access is granted on this screen by clicking on the User you wish to add access to, placing a red check mark next to their name.



If you specify access to this employee to a user on the access tab, the user will automatically be given access to this employee in the user list. This prevents you from having to enter the access information twice, once on the Access tab for the employee and once on the Access tab for the user!

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Manager – the employee’s manager can also be designated via the drop down box at the bottom of this tab which can be used to filter criteria.

6.1.13.1. To Save the New Employee

To save the new Employee you must press the **Save** button at the bottom of the Employee Info Tab. If you press **Close**, all information will be lost and the system will exit the Edit Employee screen.

6.2. Editing an Existing Employee’s Personal Data

To edit an existing employee’s personal data, from the TimeClock Manager Main Menu, select “Employee”, then select “Add/Edit” from the drop down menu.

1. On the Edit Employee Screen scroll through the list of employees to the left and double click on the employee you want to edit (or, if you know the employee ID number, input it in the GoTo box). Personal data for the selected employee will be loaded on all of the tabs.
2. Once the employee’s personal data is displayed, make the changes to any of the tabs, as needed.
3. Once all edits have been made, press the **Save** button at the bottom of the Employee Info Tab. If you press **Close**, no changes will be saved and the system will exit the Edit Employee screen.

6.3. Removing Employees from the TimeClock Plus System

From time-to-time a company will need to remove an employee from their timekeeping system; however, this removal may not be permanent in nature. For example, the employee may be a seasonal worker, returning each summer, and it would benefit the company to keep his/her employee data in the system and just reactivate the employee when they return to work.

In addition, even with permanent removal of an employee a company may want to retain any historical information about the employee (rather than deleting all files and history where they are no longer available via reports, et cetera). TimeClock Plus offers three options for the temporary or permanent removal of an employee from the system – Suspension, Termination, or Deletion.



We recommend that you suspend or terminate your employees rather than delete them. If you suspend or terminate them, you can set criteria so that suspended or terminated employees will not show up in anything you are doing. If you delete an employee, it removes all current and historical information from the system.

6.3.1. Suspension of an Employee

Suspending an employee is recommended when you are not 100% certain the employee will not return to work for the company. They will no longer be able to clock in or out of the TimeClock system, and the criteria settings are available to exclude all “suspended” employees from drop down lists, reports, etc. In addition, you may consider renumbering all suspended individuals to place them outside your valid employee ID number range (ex. If all employees are numbered 1000 – 1075, renumber all suspended employees to numbers greater than 5000).

To suspend an employee:

1. From the TimeClock Manager Main Menu, select Employee, then “Add/Edit”. The Edit Employee screen will display.
2. Access the personal record for the employee you wish to suspend either by selecting them from the drop down list on the left hand side of the screen, or by typing their Employee ID number in the Goto box.
3. After verifying you have selected the correct employee, on the **Info** tab, enable the Individual is Suspended box by clicking it.
4. Press the **Save** button (or **Cancel** if you do not wish to complete the suspend process).
5. Consider renumbering the suspended employee to a group of numbers reserved for suspended employees (refer to Section 6.3.4 for information on renumbering employees).



*An employee can be Suspended/Unsuspended easily by selecting/deselecting this item on their **Info** tab.*

6.3.2. Termination of an Employee

Termination of an employee is recommended when there is certainty the employee will not return to work for the company. They will no longer be able to clock in or out *and* their historical data will all be maintained in the TimeClock Plus database for reporting and research purposes.

To terminate an employee:

1. From the TimeClock Manager Main Menu, select Employee then “Add/Edit”. The Edit Employee screen will display.
2. Access the personal record for the employee you wish to terminate either by selecting them from the drop down list on the left hand side of the screen, or by typing their Employee ID number in the Goto box.
3. After verifying you have selected the correct employee, on the **Info** tab, complete the Termination Date field with their last valid date of employment.
4. Press the **Save** button (or **Cancel** if you do not wish to complete the termination process).

5. Consider renumbering the terminated employee to a group of numbers reserved for terminated employees (refer to Section 6.3.4 for information on renumbering employees).

6.3.3. Permanent Removal (Deletion) of an Employee

Deleting an employee from the TimeClock system permanently removes them and all of their work history from the database. This should only be used if the employee's data will not need to be accessed for any reason, now or in the future.



This process should be used with caution (consider Terminating or Suspending the employee and/or renumbering them as described in the previous sections). Due to regulatory and business issues, some companies will not delete an employee until they have not been employed for a minimum of 3 years.

To delete an employee:

1. From the TimeClock Manager Main Menu, select "Employee" then "Delete".
2. The **Delete Employee** screen will display with a list of all employees.

Number	Name	Class	Export Code	Term Date	Suspended
1	Mick Smythe	0			
2	Joe Ramos	0			
3	Willy Smith	0			
4	Willy Hernandez	0			
5	Franco Potts	0			
6	Len Lamos	0			
7	Joseph Kelly	0			
8	Arnold Jacobson	0			
9	Curt Lane	0			
10	Carol Smith	0			
11	Tom Jacobs	0			
12	George Kelly	0			
13	Jark Kyne	0			

3. The **Filter** button on the **Delete Employee** screen can be used to filter the employee display to not include active and/or suspended employees and can also be used to show only employees who have been previously terminated.

☒ Show active individuals

☐ Show individuals terminated prior to 01/01/2099

☒ Show suspended individuals

4. Select the employee you wish to delete from the employee list by clicking on their line to highlight it.
5. To complete the deletion, press the **Process** button (or the **Cancel** button if you wish to exit without performing the deletion).



This will remove all historical data for the employee. This operation is not recommended.

6.3.4. Moving/Renumbering an Employee:

To Move/Renumber an employee (often used in conjunction with their Suspension or Termination):

1. From the TimeClock Manager Main Menu, select Employee then "Move/Renumber". The Move Employee box will display.

Number	Name	Class	Export Code	Term Date	Suspended
1	Mick Smythe	0			
2	Joe Ramos	0			
3	Willy Smith	0			
4	Willy Hernandez	0			
5	Franco Potts	0			
6	Len Lamos	0			
7	Joseph Kelly	0			
8	Arnold Jacobson	0			
9	Curt Lane	0			

Select the individual to move to a new number from the list above.
Enter the new number assignment below and click Process to perform the move.

New number assignment:

Filter **Process** **Cancel**

2. The **Filter** button on the **Move Employee** screen can be used to filter the employee display to not include active and/or suspended employees and can also be used to only show employees who have been previously terminated.
3. Select the employee you wish to move/renumber from the employee list displayed by clicking on their record to highlight it.
4. Next, input their new Employee ID number in the New Number Assignment box.
5. Press the **Process** button to proceed with the renumber (or **Cancel** to stop the operation).
6. A warning screen will display asking if you are sure you want to move the employee number X to number Y. Press **Yes** to accept or **No** to cancel the employee renumber process.



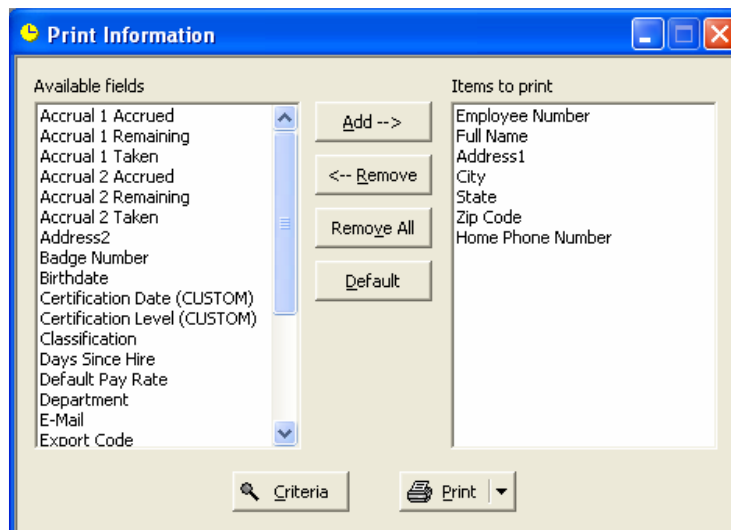
This will move all current and historical data to the new employee number.

6.4. Printing Employee Information

TimeClock Plus provides the ability to produce a report containing the fields of personal information you select, for an individual or a group of employees. This is performed via the “Print Information” option under the Employee menu.

To print a listing of employee information:

1. From the TimeClock Manager Main Menu, select Employee, then “Print Information”. The **Print Information** screen will display.



2. Select the fields you wish to add to the seven default fields in the report from the Available Fields listing by either double clicking them, or single clicking them and pressing the **Add >** button to add them to the Items to print list.
3. Remove any fields from the Items to print List by single clicking them and pressing the **<-Remove** button (or remove all fields by pressing the **Remove All** button). To return the Items to print list to only the seven default fields, press the **Default** button).
4. To filter which employees to include in the report, press the **Criteria** button and complete it as required.
5. To send the report to your default printer, press the **Print** button where you can preview the report, change printer settings, or complete the print process.
6. To exit the **Print Information** screen click the close window **X** button in its upper right hand corner.

SECTION VII: IMPORTING DATA FROM OTHER APPLICATIONS INTO TIMECLOCK PLUS

When setting up a new application such as TimeClock Plus it may be a great time saver if data can be imported into the application rather than having to be manually input. For example:

- ✓ If employees are already set up in a payroll system, and that system can produce an export file, this file can be brought into TimeClock Plus.
- ✓ Many companies maintain personal employee information, hours to date, et cetera in Excel spreadsheet files that can be imported into TimeClock Plus.
- ✓ If converting from another timekeeping application you may want to import hours-to-date into TimeClock Plus in order to have all time data for the year in one central system.

Importing is also useful in the ongoing use and management of TimeClock Plus. For example, if a company will be utilizing job codes to represent departments, and these departments are set up and maintained in an accounting system, these codes can be imported into TimeClock Plus periodically to keep the two systems' departments codes in sync with each other.

TimeClock Plus provides the ability to import several categories of data:

1. Employee Personal Information
2. Employee Job Code Assignments
3. Employee Hours-to-Date
4. Employee Accruals-to-Date
5. Employee Schedule Information
6. Job Codes (to Master Job Code List)

All imports require the source file to be one of the following three types (these are standard formats and exports that can be produced from most applications in these formats):

- ✓ Delimited ASCII text file
- ✓ Fixed length ASCII text file
- ✓ DBase compatible file



If you are importing data from other software applications (payroll, Excel, etc.) use the features in these applications to export the data in one of these three standard formats.

7. The Import Process

7.1. The Process Common to all Imports

To access the importing section, open TimeClock Manager and go to File, Import. All imports utilize a standard 3-step process in which the filename to import is designated and all fields from the source file are mapped to TimeClock Plus fields. The following "File Information" screen is used to begin the import process. Several additional screens are used in this process and the **Next>** and **<Back** buttons are used to walk through the process.

File Information

Filename to import: C:\tempimport.csv

File type: Delimited ASCII Text

Records to skip: 1 (Skip unused header records)

Default map file:

Field delimiter: Comma (,)

☐ Treat consecutive delimiters as one

☐ Use first line in file as header to generate field mappings

File preview

```
1."Mick","Smythe","2391 Forest Lane","","Smallville","TX",12232,N,"",11122333;
2."Joe","Ramos","333 Johnson","","Smallville","TX",83114,N,"",111223333,Wai
3."Willy","Smith","9264 Harper","","Rogers","TX",09056,N,"",111223333,Cashie
4."Willy","Hernandez","2439 Jackson","","Alton","TX",28873,N,"",111223333,D
5."Franco","Potts","6270 Blakewood","","Smallville","TX",62737,N,"",11122333;
6."Len","Lamos","191 Ave A","","Rogers","TX",33777,N,"",111223333,Host/Hc
7."Joseph","Kelly","6359 Ave B","","Smallville","TX",15387,N,"",111223333,Atte
8."Arnold","Lashbrook","5419 Lashbrook","","Alton","TX",07700,N,"",111223333,K
```

< Back Next > Cancel Help

7.1.1. The File Information Screen

This screen is used to provide information about the source file you will be importing.

Complete each of the fields as follows:

Filename to import – either type in the name of the file you wish to import or browse for it by clicking the File Open Icon to the right of this text box. The filename must include the file's location, for example C:\tempimport.csv.

File Type – select the type of file you are importing by selecting it from the drop down menu.



You can import 3 types of files into TimeClock Plus. You can import, fixed length ASCII, delimited ASCII (you can specify the delimiter), or Dbase compatible files.

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Records to skip – in some source files the initial record(s) may serve as a space holder or header record (for example, it may include titles for each of the columns of data). By inputting a number in this box you designate the number of records (lines of data) to skip before beginning the data import.

Default map file – map files can be created and stored for those imports that you may perform on an ongoing basis. To use an existing map file for an import, select it from the File Open Icon to the right of this text box.



Map files are created during the Import Process, see Step 2 below.

Field delimiter – in delimited files there is a character used to separate the different fields of data (most commonly commas, pipes, spaces, or tabs).

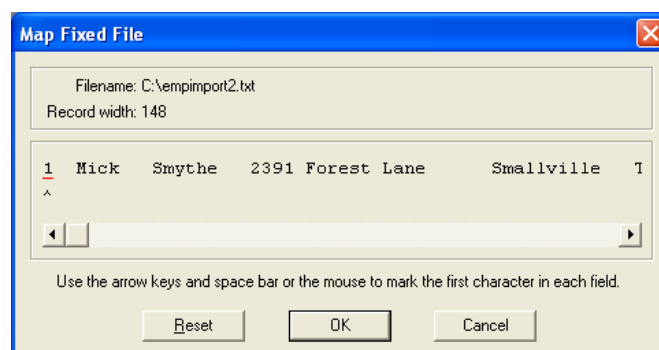
Select the type of delimiter used in the source file by clicking the down arrow to the right of this text box. If the delimiter is not listed in the selection box, select 'Other' and a box will appear for you to manually enter the delimiter used.

Treat consecutive delimiters as one – if enabled with a check, the import process will treat consecutive delimiters as one instead of separating them. For example, in this data, the consecutive commas would be treated as one "Bob Smith,,,,,444556666,,,". Be cautious when using consecutive delimiters because they often serve as a notation that empty fields exist in your source file.

File preview window – this window provides a preview of the file you are importing. This preview will assist you in determining if the data is in the correct format.

- Press the **Next >** button to proceed to the next import process screen.

Map Fixed File – if you specified the file format as Fixed Length ASCII Text, when you click Next, you will be prompted to specify the fields for the Fixed Length file.



To set the beginning of each field, you can click on the beginning field position with the mouse. When you click on the beginning of a new field, the carrot '^' will show below it. The carrot '^' designates the first character of a field.

You can also specify the beginning of each field by using the left/right arrow keys to move the red bar below the fields. When the red bar is below the character that begins a new field, hit the space bar and the carrot '^' will appear to designate the field.

Once you have mapped the fields for the Fixed Length ASCII Text file, click on OK to proceed to the next screen for mapping each field.

7.1.2. The Mappings Screen

This screen is used to map fields from your source file into fields of the TimeClock Plus application. The first row of data from your source file displays in the left hand column of the table (all other rows/records in the source file are assumed to have the same format as the first row).

The screenshot shows a window titled "Mappings" with a close button in the top right. Inside, there is a text box that says "Select each field from the import file and map it to the appropriate field in the local database. Fields with asterisks are required." Below this is a table with two columns. The left column contains source data, and the right column contains target fields from the TimeClock Plus application. The first row of data is highlighted in blue. Below the table are two buttons: "Offsets" and "Load map". At the bottom of the window are four buttons: "< Back", "Next >", "Cancel", and "Help".

Source Data	Target Field
1	Employee Number
Mick	First Name
Smythe	Last Name
2391 Forest Lane	Address1
	Address2
Smallville	City
TX	<<< Not Mapped >>>
12232	Last Name
N	Address1
	Address2
	City
111223333	State
Kitchen Worker	Zip Code
	Suspend Status
	Export Code
	Social Security



This screenshot illustrates the Mapping Screen for Importing Employee Information. Each Import Process utilizes a different Mapping Screen, as described in the following sections.



The fields in your source file can be in any order – they do not have to be in the same order as the TimeClock Plus field listing, which displays in the drop down menu during the import process.

7.1.2.1. To map an import file without using an existing Default Map File:

1. To begin mapping the fields of your source file click on the right hand column of each line item to access the TimeClock fields drop down menu.
2. Next, select the appropriate TimeClock field from the options available in the drop down menu.



Each field can be mapped only once; the only exception is the Shift Notes field.

3. Proceed mapping each field from your source file by clicking on the right hand column and designating the TimeClock equivalent.
 - a. The **Offsets** button – this button is used when the source file includes extraneous features at the beginning of each field. Clicking this button will take you to the Field Offsets screen where the following options are available to eliminate/correct these offsets during the import.
 - b. To eliminate an offset for a field of data, select the field by clicking on it to highlight it. Next, toggle the **+** and **-** buttons in the bottom right hand corner of the Field Offsets screen to see the effect under the “New Text” column. To save your offsets, press the **OK** button (or **Cancel** to exit the screen without saving the offsets).
 - c. To reset a field to its original text, press the **Reset** button with the field highlighted.
 - d. To reset all fields to their original text, press the **Reset All** button.
 - e. To save your offsets, press the **OK** button (or **Cancel** to exit the screen without saving the offsets).
4. Once mapping is complete, press the **Next>** button to proceed to Step 3.

7.1.2.2. To map an import file using an existing Default Map File:

1. Before right clicking on any of the source fields, press the **Load Map** button and select the Default Map File you wish to utilize for mapping purposes. The TimeClock fields in the right hand column will populate from the map file designated.
2. You can make changes once a Default Map File has been loaded by clicking on the field in the right hand column you wish to change. This will not affect your Default Map File unless you click the **Save Map** button. This will cause any changes made to the mapping to be saved over the existing Default Map File.
3. Once mapping is complete, click the **Next>** button to proceed to the next section.



The **Clear Map** button can be used at anytime during the mapping process to clear all mapped fields in the right hand column and begin the mapping process anew.



If importing Employee information, you will need to complete the **Options** Screen (otherwise, go to step 4).

If importing employee information, complete each of the fields on this screen as follows:

Modify existing data with data being imported if record already exists – if enabled, existing data will be overwritten with data from the new source file if a duplicate is found. For example, if your source file includes a record for Employee number 42, and Employee number 42 already exists in the TimeClock system, the existing record will be overwritten by the data found in the new source file. This can be helpful when updating personal information fields such as address, phone number, et cetera for employees that already exist in the TimeClock system.

Add records to database if they do not already exist – if enabled, the import will process a record for a designated employee ID number even if that employee does not exist in the system.

Base added records on what template: - (applies to the import of employee information only) the TimeClock system may contain several Employee Templates. If enabled, this line item allows you to import an employee and automatically populate any fields that were defined in the Employee Template chosen from the drop down menu to the right of this field.



Employee templates are created via the TimeClock Manager; see Section 4.3 for more information on the use of templates.



When a new employee is added using an Employee Template, the template will load first, then the import file will be processed.

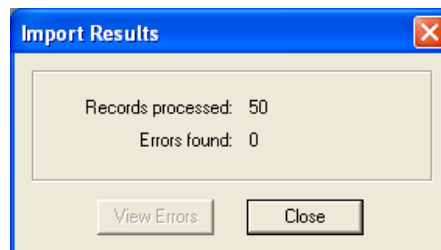
Click the **Next>** button to proceed with the import process.

7.1.3. The Summary Screen

The Summary screen displays a written summary of the import process just defined. Review the information for completeness before proceeding.

To process with the import, click the **Finish** button (or the **Cancel** button to cancel the operation without processing the import).

You can also return to any of the previous import process screens to make modifications by pressing the **<Back** button. The following Import Results screen will display when the import is complete. Press the **Close** button to exit the import process.



7.2. Importing Employee Personal Information

The Import Employee Information Process is used to import the personal information for an employee such as name, address, etc. This import process is accessed from the TimeClock Manager Main Menu > File > Import > Employee information.

The following 23 fields are available during this mapping process, and your source file can include any or all of these fields:

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Employee ID number	Department
First Name	Badge Number
Last Name	Network ID
Address1	Home Phone
Address2	Birthdate
City	Hire Date
State	Termination Date
Zip Code	Gender
Suspend Status	Classification
Export Code	Email Address
SSN/SIN	Default Pay Rate
Cell Phone	

7.3. Importing Job Codes to the Master Job Code List

The Job Code Import Process is used to import job codes to the Master Job Code table. It can be accessed via the **Import** button on the Master Job Code List screen (TimeClock Manager Main Menu > Configuration > Master Job Code list).

The following 31 TimeClock Plus fields are available during the job code mapping process, and the source file can include any/all of these fields:

Job Code Number	Earns OT
Active	Counts Toward OT
Job Description	Tracked Field Entry 1
Exports As	Tracked Field Entry 2
Auto Deduct Minutes 1	Tracked Field Entry 3
Auto Deduct Minutes 2	Ask Cost Code Flag
Auto Deduct Minutes 3	Job Code Group
Auto Deduct Hours 1	Auto Out Hours
Auto Deduct Hours 2	Override Rounding and Minimums (1-4)
Auto Deduct Hours 3	Enforce Minimum Flag (1-4)
Paid Flag (1-4)	Break Minimum (1-4)
Paid Minutes (1-4)	Round Breaks Flag (1-4)
Paid Limit (1-4)	Round to Minutes (1-4)
Default Hourly Rate	1 st Round at Minutes (1-4)
Auto Out Minutes	2 nd Round at Minutes (1-4)
Clockable	

7.4. Importing Employee Job Information

The Import Employee Job Information Process is used to import job code assignments/settings for each employee from another source. It can be accessed from the TimeClock Manager Main Menu > File > Import > Employee job information

The following 13 fields are available during this mapping process, and your source file can include any/all of these fields:

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Employee Number	Tracked Field 2 Entry
Job Code	Tracked Field 3 Entry
Rate	Force Overtime 1
Clockable	Force Overtime 2
Earns OT	Use Default Rate
Counts Toward OT	Is Default Job
Tracked Field 1 Entry	

7.5. Importing Employee Hours

The Import Employee Hours Process is used to import hours-to-date for each employee from another source. It can be accessed from the TimeClock Manager Main Menu > File > Import > Employee hours.

The following 26 fields are available during this import mapping process, and your source file can include any/all of these fields:

Number	Shift Note
Date In	Break Type
Time In	Manager Approval Flag
Date Out	Individual Approval Flag
Time Out	Force Overtime 1 Flag
Job Code	Force Overtime 2 Flag
Rate of Pay	Disable Auto Deduct Flag
Tracked Field 1	Missed In Punch
Tracked Field 2	Missed Out Punch
Tracked Field 3	Missed In Punch Approval
Is Time Sheet (0 or 1)	Missed Out Punch Approval
Time Sheet Minutes	

7.6. Importing Employee Accruals

The Import Employee Accruals Process is used to import hours accrued and taken to date, by job code, for each employee from another source. It can be accessed from the TimeClock Manager Main Menu > File > Import > Employee accruals.

The following 7 fields are available during this import mapping process, and your source file can include any/all of these fields:

Employee Number	Hours Over Limit
Job Code	Post Date
Hours Accrued	Manual Entry
Hours Taken	



Employee hours can only be imported for the dates during the current week or up to 28 days after. You cannot import hours for weeks that have been closed.

SECTION VIII: INITIAL SET UP OF THE ON-SCREEN TIMECLOCK

The On-Screen TimeClock allows employees to clock in and out from a personal computer. It can be customized to display in different formats and to include/exclude certain information and options for employees. You can have multiple configurations of the On-Screen TimeClock and assign each to a different client workstation.

This section provides instruction on the customization of these options and display features.



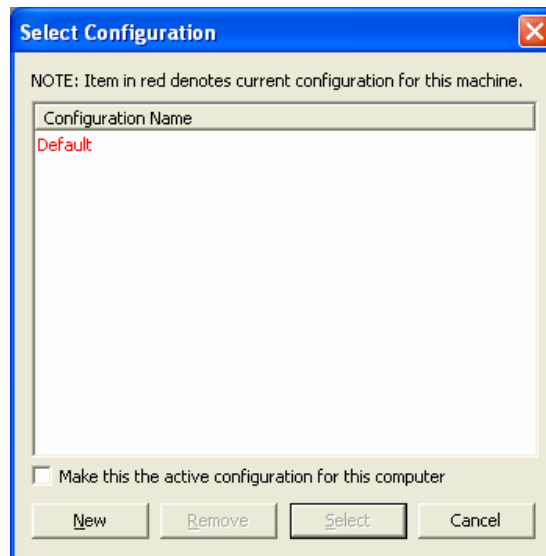
It is recommended that you configure the On-Screen TimeClock before beginning clock in/out operations.

8. Set Up of the On-Screen TimeClock

8.1. Configuring the On-Screen TimeClock

To access the On-Screen TimeClock Configuration Menu, launch the On-Screen TimeClock (either from the Windows Start Menu or from the TimeClock Manager Main Menu > Launch > On-Screen TimeClock). Next, right click on the title bar of the On-Screen TimeClock and select Configure Settings.

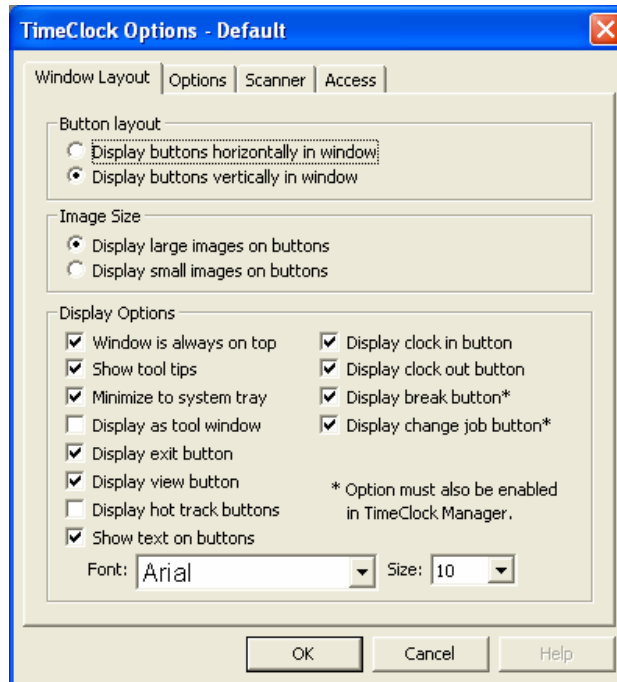
The **Select Configuration** screen appears with a listing of existing configurations.



1. To add a new configuration, press the **New** button and the **Select Configuration** screen will appear.
2. Enter a name for the new On-Screen TimeClock configuration and press the **OK** button. The name will now appear in the Configuration Name list box.
3. Click on the configuration you wish to edit from the list of configuration names and click the **Select** button. The **TimeClock Options {name of configuration}** screen will display tabs of settings.
4. **Make this the active configuration for this computer** – If checked, the selected (highlighted) configuration will be the active configuration for this computer. In other words, the settings set and configured for that configuration will be active on this computer.



If a configuration is not specifically assigned to a computer it will use the default configuration. It is recommended that you configure the default settings to use for the majority of your clients and assign specific configurations to individual clients that need specific settings. Configurations can be assigned through TimeClock Manager > Configuration > Configuration Manager.



The different tabs containing configuration options are available, as follows:

8.1.1. **Window Layout** Tab

This tab contains settings for how the On-Screen TimeClock will display on the personal computer(s) it is launched from. Place a check next to each item you wish to enable/activate.

Button Layout - select whether you want the clock in/out buttons to display horizontally or vertically.

Image Size – select whether you want the buttons to include large or small images.

Display Options – place a check mark next to each of the display options you wish to activate.

Show text on buttons – if this option is enabled the On-Screen TimeClock will display the words “Clock In”, “Clock Out”, “Break” and “Job Code” with the icons on the buttons. If it is not activated only the icon images will display on each button.

Window is always on top – if this option is enabled the On-Screen TimeClock will always be the top window displayed on the personal computer, and thus always visible to the user (unless it is minimized).

Show tool tips – if enabled when the mouse is placed on the icon image a description of the button will display.

Minimize to system tray – if enabled the system will send the On-Screen TimeClock to the Windows system tray when it is minimized.

Display as tool window – if enabled, the system will display the On-Screen TimeClock as a half-height caption bar which is useful if you are attempting to minimize the space it takes up on the screen.



When this option is enabled there will be no system menu or minimize button. To access the On-Screen TimeClock settings you must right click on the caption bar and choose Configure from the menu displayed.

Display exit button – if this option is enabled the On-Screen TimeClock will include an Exit button (to exit from the On-Screen TimeClock) along with the other buttons.

Display view button – if this option is enabled, the On-Screen TimeClock will include a View button to allow employees to view their hours worked, current schedule, et cetera from the On-Screen TimeClock.

Display hot track buttons – if this option is enabled, the On-Screen TimeClock buttons will display in grayscale until the mouse is placed over them, at which time they will display in color.

Display clock in button (and clock out button) – in some instances you may want to disable the clock in and out buttons for the On-Screen TimeClock. For example, you may want everyone to clock in/out from an RDT device, but then allow them to perform job code changes, go on break, et cetera from their personal computer. Do not check these two boxes if you do not want employees to be able to clock in and out from the On-Screen TimeClock.

Display break button – If this option is enabled the break button will be displayed on the On-Screen TimeClock.

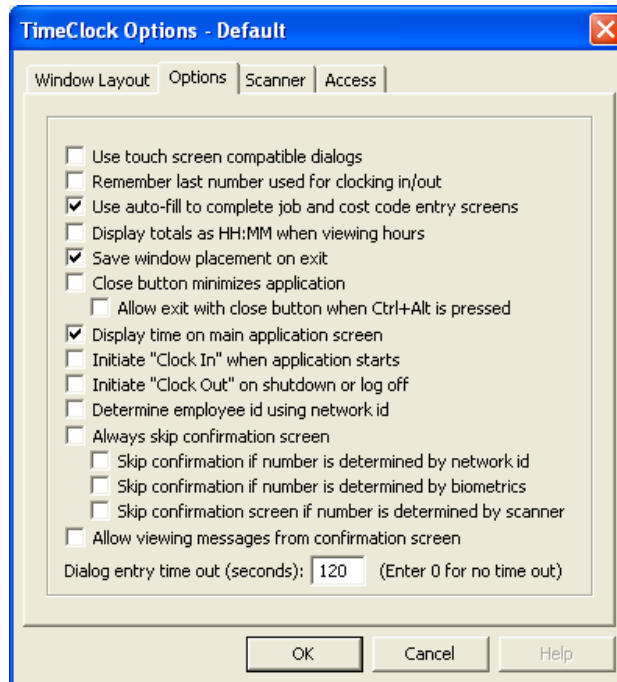
Display change job button – If this option is enabled, the Job Code button will be displayed on the On-Screen TimeClock.



The 'Display break button' and 'Display change job button' options in the On-Screen TimeClock require that the options, 'Allow break, lunch, etc. option' and 'Allow change job code option', in TimeClock Manager Defaults be enabled.

8.1.2. **Options** Tab

The **Options** tab contains several settings you may wish to enable by placing a check mark in their box. If enabled, each of these options would perform the following:



Use touch screen compatible dialogs – if enabled, large buttons will display for the On-Screen TimeClock, making touch screen-based clock operations simpler. When prompted to enter a number for employee Id, job code, et cetera, a number keypad will be displayed for entry of the information.

Remember last number used for clocking in/out – if enabled, the On-Screen TimeClock will remember the last employee number entered. This is helpful if only one person clocks in/out from a personal computer/On-Screen TimeClock as the TimeClock retains the last employee Id number used at clock in and displays it in the input box.

Use auto-fill to complete job and cost code entry screens – if enabled, the system will attempt to complete the job code or cost code as you enter it based on the codes in the system.

Display totals as HH:MM when viewing hours – if enabled, the On-Screen TimeClock will display time as hours and minutes rather than hundredths of an hour (i.e. 12:30 vs. 12.50).

Save window placement on exit – if enabled, the position and size of the On-Screen TimeClock window will be saved when the application is closed, and reused next time it is launched.

Close button minimizes application – if enabled, pressing the **Close** button (X in upper right hand corner), on the On-Screen TimeClock will only minimize it to the system tray, not actually exit the application.

Allow exit with close button when Ctrl+Alt is pressed – pressing **Ctrl** + **Alt** + **Close** will exit the application.

Display time on main application screen – if enabled, the current system time will display at the top of the main window.

Initiate “Clock In” when application starts – if enabled, when the On-Screen TimeClock is launched it will automatically initiate the clock in procedure for an employee.

Initiate “Clock Out” on shutdown or log off – if enabled, when an employee shuts down or logs off of their computer, the On-Screen TimeClock will initiate the clock out procedure.

Determine employee id using network id – if enabled, TimeClock will look at the employee’s network login to try and determine their employee number. For example, if I logged onto my computer as “kandrews”, TimeClock will try to find an employee that has a network id of “kandrews”.



This requires that the network id be entered for that employee on the Info tab of Employee> Add/Edit.

Always skip confirmation screen – if enabled, when performing a clock operation no confirmation screen will display for the employee to confirm they entered the correct employee number.

Skip confirmation if number is determined by network id – if enabled, TimeClock will skip the confirmation screen if the employee number was determined by the network id.

Skip confirmation if number is determined by biometrics – if enabled, TimeClock will skip the confirmation screen if the employee number was determined by a biometrics device such as a Secugen Fingerprint Scanner.

Skip confirmation if number is determined by scanner – if enabled, TimeClock will skip the confirmation screen if the employee number was determined by using a serial scanner.

Allow viewing messages from confirmation screen – if enabled, employees will be able to view messages sent using the Messaging tool found in the TimeClock Manager.

Dialog entry time out (seconds) – if enabled, any dialogs boxes (screens) that come up, such as the screen to enter the employee number, the confirmation screen, etc., will time out and close after X seconds. To not have the screens close, '0' will enable no time out.

8.1.3. **Scanner** Tab

This tab is only required if there is a serial or barcode reader attached to the workstation used to access the On-Screen TimeClock. If a reader is not attached the port address should be set to disabled.

The screenshot shows the 'TimeClock Options - Default' dialog box with the 'Scanner' tab selected. The dialog has four tabs: 'Window Layout', 'Options', 'Scanner', and 'Access'. The 'Scanner' tab contains the following settings:

- Port address: Disabled (dropdown menu)
- Baud rate: 9600 (dropdown menu)
- Settings: N,8,1 (dropdown menu)
- Start character: 0 (text box) (1-255 or 0 to disable)
- Stop character: 0 (text box) (1-255 or 0 to disable)
- ☐ Allow QuickPunch from main window

At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.

With the serial scanner you should also have received documentation from the manufacturer as to what the Port address is, what the baud rate is, what the settings are, and if they require any start and stop characters. You may also be able to configure the serial scanner yourself for each of these settings. Refer to the manufacturer's settings or configuration of the serial scanner to retrieve these settings. Once you know the settings, enter them on the **Scanner** tab.



Refer to the documentation provided by the manufacturer of the serial scanner as to what the settings should be set to in order for the serial scanner operate.

Start/Stop character – if the scanner sends a specific start or stop character, enter that character here so that TimeClock can expect it and work accordingly.

Allow QuickPunch from main window – if enabled, you can use QuickPunch with the On-Screen TimeClock. This allows you to simply scan the code with the serial scanner to perform a clock operation. You are not required to initiate a clock operation such as clicking on Clock In, Clock Out, et cetera.

8.1.4. **Access** Tab

The **Access Tab** is used to restrict access to individuals from the On-Screen TimeClock. You can either restrict or allow individuals access according to their employee number, classification, or by job codes.

The screenshot shows the 'TimeClock Options - Default' dialog box with the 'Access' tab selected. The dialog has four tabs: 'Window Layout', 'Options', 'Scanner', and 'Access'. Below the tabs, there is a text box stating: 'To restrict which individuals can use the On-Screen TimeClock with this configuration, select an access template defined below.' Below this text is a table with two columns: 'Description' and 'Active'. The table is currently empty. At the bottom of the dialog, there are four buttons: 'Add', 'Edit', 'Remove', and 'Set Active'. At the very bottom, there are three buttons: 'OK', 'Cancel', and 'Help'.

8.1.4.1. To add an access template:

1. Click the **Add** button on the Access tab.

The screenshot shows the 'Access Restriction Editor' dialog box. It has a 'Restriction Template' section with three fields: 'Description' (text box with 'Production Floor - Rear'), 'Restriction type' (dropdown menu with 'Individual's ID Number'), and 'Status' (dropdown menu with 'The selected items are not allowed'). Below this section is a table with four columns: 'Include', 'Id', 'Name', and 'Class'. The table contains 16 rows of data. The 'Include' column has checkboxes, some of which are checked. The 'Id' column contains numbers from 1 to 16. The 'Name' column contains names. The 'Class' column contains the number 0. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Include	Id	Name	Class
	1	Mick Smythe	0
✓	2	Joe Ramos	0
✓	3	Willy Smith	0
	4	Willy Hernandez	0
	5	Franco Potts	0
	6	Len Lamos	0
	7	Joseph Kelly	0
	8	Arnold Jacobson	0
	9	Curt Lane	0
✓	10	Carol Smith	0
	11	Tom Jacobs	0
✓	12	George Kelly	0
	13	Jack Kyne	0
✓	14	Mark Kyne	0
✓	15	Mike Jacobson	0
✓	16	Arnold Uma	0

2. The Access Restriction Editor will open. You should enter a name of the Template in the Description field.
3. For the Restriction type, you should set it to one of the three options:
 - Individual's ID Number – this option will restrict employee access based upon what their employee number is. For example, you can restrict employee 531 from performing any clock operations.
 - Individual's Classification – this option will restrict employee access based upon what their classification is set as. This field is the 'Class' field in TimeClock Manager, on the employee's **Info tab**. For example, you can restrict employees that have a Class field of '9'.
 - Individual's Job Codes – this option will restrict employee access based upon what job codes the employee tries to clock in/out using. For example, you can restrict an employee from clocking in using Job Code 500.
4. Next, set the Status for how you would like to restrict:
 - No restrictions – this option will not restrict anyone based upon the Restriction type specified.
 - The selected items are not allowed – this option will not allow any of the included items to have access to perform a clock operation.
 - The selected items are allowed – this option will allow the included items to have access to perform clock operations.



This is useful if you want to allow only 20 employees out of 100. You can include only those 20 employees and set the status to allow the selected items so that only those 20 employees have access. Rather than setting those 80 employees to not have access.

5. Once you have your Restriction Template settings configured, you should select what information to include. To set the information to include, place a check mark in the Include column by highlighting the item you want to add and then clicking in the Include column with the mouse.
6. Once you specify the information to include for the Restriction types, click **OK** to save the Restriction Template (or click **Cancel** to cancel your changes and exit the Access Restriction Editor).



You can specify restrictions for all three Restriction Types within one template. So you can configure one template to restrict by employee number, classification, and job codes.

7. The last thing to do is to activate a template. Do this by highlighting the Template on the Access tab, and either put a check mark in the Active column, or click on the Set Active button.



If a Restriction Template is not set as active, then the restrictions will not take effect. You can only set one Restriction Template as active at a time.

8.1.4.2. Editing a Restriction Template – To edit an existing Restriction Template, highlight the template on the Access tab and then click on Edit.

8.1.4.3. Removing a Restriction Template – To remove an existing Restriction Template, highlight the template on the Access tab and then click on remove. Once you remove the Restriction Template, it will no longer be available and the restrictions configured within that template will no longer be active.

8.2. Configuring Reminders

TimeClock Plus provides the ability to schedule repetitive actions to be invoked via the On-Screen TimeClock (such as play an audio file through a computer's speaker or display a message on PCs with the On-Screen TimeClock). Reminders have several different uses such as broadcasting a message (via audio file) over a PA system, displaying a message on the PC screen when it is time to clock out, et cetera.



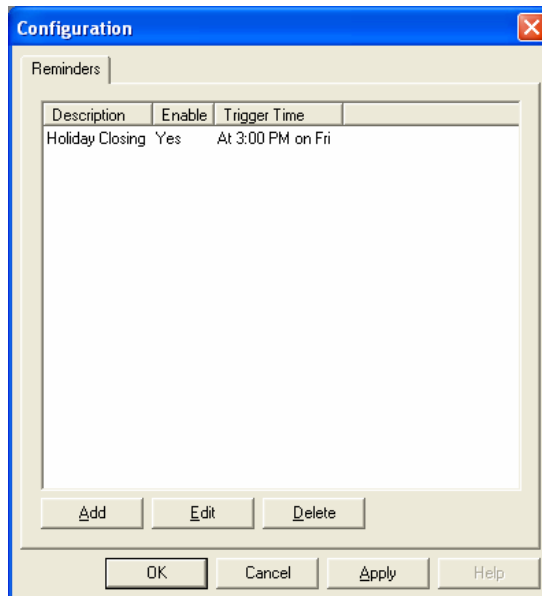
Reminders will work only if the On-Screen TimeClock is open. If the On-Screen TimeClock is not open, then reminders will not activate.

There are four types of actions that can be automatically executed per a schedule:

- Play Audio File – the On-Screen TimeClock will play a .WAV file at the time specified. You must have a sound card installed on the PC running the On-Screen TimeClock for this option to function. The name of the file must include its address (ex. C:\sounds\horn.wav).
- Launch File – the On-Screen TimeClock will launch the named file at the time specified. The launched file must be an executable type and the name must include its address.
- Beep Speaker – will beep the speaker to draw attention to the computer monitor. This function is normally used in conjunction with other reminder options such as Display Message and Launch File.
- Display Message – will display a message on the screen of the PC where the On-Screen TimeClock is being used at the time specified.

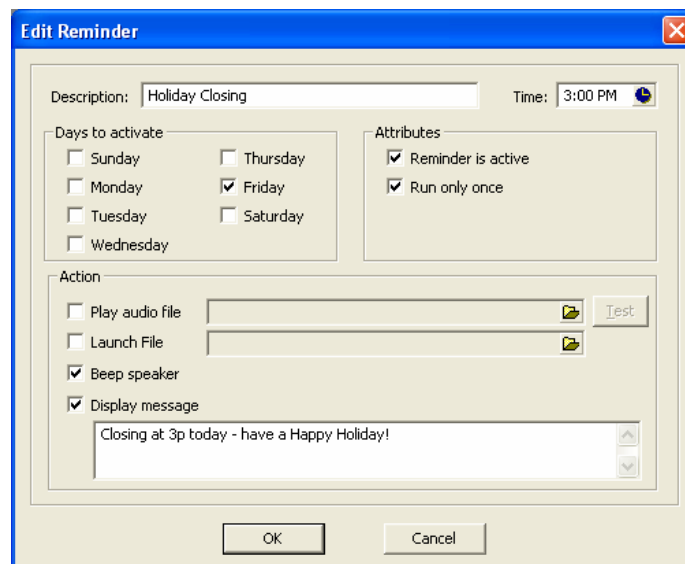
8.2.1. To configure reminders:

1. Launch the On-Screen TimeClock (either from the Windows Start Menu or from the TimeClock Manager Main Menu > Launch > On-Screen TimeClock).
2. Right click on the title bar of the On-Screen TimeClock and select Configure Reminders. The Configuration screen will display.



8.2.1.1. To add a reminder:

1. On the **Reminders** Tab, click the **Add** button. The **Edit Reminder** screen will display.



2. Enter a description for the reminder in the input field.
3. Designate a time for the reminder to be executed (from the drop down menu or via manual entry).
4. Place a check mark for each day of the week you want the reminder to play.
5. Designate under Attributes whether this is an active/ongoing reminder, or should only run once.
6. Place a check mark next to the Action this reminder is to take. In order to play an audio file or launch a file (executable) you must also designate the file (including its location, such as C:\sounds\whistle.wav). If you selected "Display Message" you must type the message in the text box. Press the **OK** option to save the reminder and activate it.

8.2.1.2. To edit an existing reminder:

1. On the **Reminders** Tab, select the reminder you wish to edit from the list and click on the **Edit** button. The Edit Reminder screen will display.
2. Make required changes to the reminder settings then press the **OK** button to save it and reactivate it.

8.2.1.3. To delete an existing reminder:

1. On the **Reminders** Tab, select the reminder you wish to delete from the list and click on the **Delete** button.
2. To accept the action and permanently remove the reminder click the **OK** button or click **Cancel** if you do not want to delete the reminder selected.

SECTION IX: DAY-TO-DAY MANAGEMENT OF TIMECLOCK PLUS DATA

This section of the user guide provides information on all the processes required to maintain and manage your timekeeping data. The first three sections present the methods for editing and adding time records, reporting and exporting of data. The "real-time" attendance monitoring tools are presented in Section 9.6, and the last two sections provide instruction on messaging, labor tracking, and the processes provided to keep your system healthy.

9. Day-to-Day Timekeeping and Time Management

9.1. Editing and Adding Employee Hours/Shifts

The ability to edit shifts and/or manually add shifts to an employee's time record is essential in any timekeeping system. These functions allow a designated individual to input time taken under a non-clockable job code (sick, vacation, PTO, et cetera) as well as correct inaccurate or incomplete clock operations for the company's employees. TimeClock Plus provides three methods for performing shift edits and additions – "Edit Hours", "Global Record Addition", and "Quick Add Hours", all of which are found on the Employee Menu of the TimeClock Manager.

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9.1.1. Editing an Existing Shift Record (TimeClock Manager Main Menu > Employee > Edit Hours)

1. From the TimeClock Manager Main Menu select Employee, then select “Edit Hours”. The **Edit Hours** screen will display for the current week.

TimeClock Manager 4.2 - [Edit Hours - 12/21/2008 to Current]

File Edit View Employee Reports Export Tools Configuration Launch Window Help

Goto: Name: Carol Smith Hours: 40 Hours 0 Mins

Number	First	Last	M	E	Note	Edit	B	Time In	Time Out	Code	Hours	Rate	Break	Total	Week Total
1	Mick	Smi				Y		12/22 08:00 AM	12/22 12:00 PM	200-Engineering	4:00	0.00	Break 60u		
2	Joe	Rar				Y		12/22 01:00 PM	12/22 05:00 PM	200-Engineering	4:00	0.00		8:00	
3	Willy	Smi				Y		12/23 08:00 AM	12/23 12:00 PM	200-Engineering	4:00	0.00	Break 60u		
4	Willy	Her				Y		12/23 01:00 PM	12/23 05:00 PM	200-Engineering	4:00	0.00		8:00	
5	Franco	Pot						12/24 08:00 AM	12/24 12:00 PM	200-Engineering	4:00	0.00	Break 60u		
6	Len	Lar				Y		12/24 01:00 PM	12/24 05:00 PM	200-Engineering	4:00	0.00		8:00	
7	Joseph	Kell				Y		12/25 08:00 AM	N/A	3000-Holiday	8:00	0.00		8:00	
8	Arnold	Jac				Y		12/26 08:00 AM	N/A	3000-Holiday	8:00	0.00		8:00	40:00
9	Curt	Lan													
10	Carol	Smi													
11	Tom	Jac													
12	George	Kell													
13	Jack	Kyr													
14	Mark	Kyr													

Accrual Information

Job Code	Accrued	Used	Accrual Forecast	Usage Forecast	Remain
2000-Vacation	40.0000	8.0000	0.0000	0.0000	32.0

Schedule Information

Date	Time In	Time Out	Job Code

Prev Next Criteria Options Shift View Print History

For Help, press F1 01/02/2009 03:07:52 PM Current Week: 12/21/2008 VIRTUAL\TIMECLOCKPLUS

The screen is divided into several sections and includes display areas for shifts worked, accruals and current schedule. It will automatically display data for the current week though previous weeks can be accessed via the **History** button.

2. To access an employee's shift records either input their Employee ID Number into the **GoTo** box, or select the employee from the employee list displayed in the upper left hand corner of the Edit Hours screen by double clicking on him/her.



The employee listing can be sorted in ascending or descending order by employee number, first name, last name, class, home, or department by clicking on the column headers.

3. Once selected, the employee's hours will display in the **shift window** on the upper right portion of the screen. Each shift record includes several self-explanatory fields such as the employee's time in, time out, job code, hours worked, hourly rate, and break taken.



If a shift is shown in **red text**, it means the shift contains a break; **green text** designates a conflict with another shift. In order for the shift to be highlighted (shown in red), the option must be enabled in Edit Hours options.

It also includes three columns titled M, E and Notes, used as follows:

- The M column is used to designate if a particular shift has been approved by a Manager (a check mark designates approval).
- The E column is used to designate if a particular shift has been approved by the Employee (a check mark designates approval).
- The Note column will display a picture of a note if one has been placed on the shift.

To interact to any of these three columns, click under the column on the shift you wish to interact with (for example, to enter a shift note click under the note column and an input box will appear to type the shift note into). These options can also be set by clicking on the Shift button and selecting the appropriate option from the popup menu.

The employee's accrual balances and time taken will display in the bottom left portion of the Edit Hours screen titled Accrual Information.



Accrued values are only updated when the week is closed via the Close Week process. When viewing the current week's data (without a close week) these values will not reflect actual time taken or accrued during the current week. The system will attempt to estimate the accruals that remain based on hours used during the weeks that have not been closed.

The bottom right portion of the Edit Hours screen is titled Schedule Information and will display the employee's schedule for the week including date, time in, time out and job code. When editing hours for the current week the box will display this week's schedule, plus up to three additional weeks in the future. When editing hours in a previous week (before a close week has been processed), only the shifts scheduled for that week will display.



The **Options** button is used to configure display options for the Edit Hours screen. Each of the options should be enabled or disabled to meet your operational needs.

The options are:

- ✓ **Display times in list in hours:minutes format instead of hundredths.**
- ✓ **Highlight shift segments that contain breaks.**

- ✓ **Display the actual clock in and out times in addition to the rounded times.**
- ✓ **Auto open accrual window when edit hours opens**
- ✓ **Auto open schedule window when edit hours opens**
- ✓ **Ask for confirmation when deleting a shift from an individual**
- ✓ **Warn if a shift being added/edited in current week will exceed accruals**
- ✓ **Shade even rows in list for clarity using this color**
- ✓ **Default Times – this section of the Edit Hours Options screen allows you to establish a default “time in” and “time out” to be used when manually adding shifts to an employee record.**

1. To edit an existing shift (displayed in the shift window) select it by either:

- Double click on the shift to select it
- Select (highlight) a shift and click the **Shift** button. Select “Edit Shift” from the drop down menu

The Edit Hours box will display with current data for each field loaded from the shift selected.

2. Place the cursor on the field you wish to change and type in the correction (or select it from the tool box to the right of the field where applicable, i.e. Calendar tool, Clock tool, or Job Code listing).
3. Once your edits have been made, press the **OK** button to save your edits and return to the full Edit Hours screen (or **Cancel** to return without saving the edits).



If you are editing hours that have been rounded, you may be prompted with an Edit Warning dialog box that asks you what you would like to do with the rounded times. You can either leave the times as they are, without any changes, or accept the changes. If you check the option to assume this action for further changes, you will not be prompted with this message in the future.

9.1.2. Adding a New Shift Record

Adding a new shift can be accomplished in various ways – via the “Edit Hours” function, the “Quick Add Hours” function, or “Global Record Addition”. All of these options are accessed via the Employee menu of TimeClock Manager.

9.1.2.1. Adding a Shift from “Edit Hours”

To add a shift while in the Edit Hours function,

1. Press the **Shift** button on the bottom of the Edit Hours screen and select “Add Shift” from the drop down menu or press CTRL+A.
2. The same Edit Hours window discussed in the previous section will display with today’s date and default times automatically populated. Make any required edits to these fields.
3. Save your entry by pressing **OK** (or **Cancel** if you wish to return to the previous screen without saving your edits).

9.1.2.2. Adding a Shift via “Quick Add Hours”



By using Quick Add Hours to add a shift record, the same record can be added for a group of employees by selecting (highlighting) multiple employees at one time.

1. From the TimeClock Manager Main Menu select “Employee”, and then select “Quick Add Hours”. The Quick Add Hours window will display with a list of employees on the left hand side and required shift fields on the right hand side. It will automatically display with today’s date and default times populated.

Nu...	First	Last	Class
1	Mick	Smythe	0
2	Joe	Ramos	0
3	Willy	Smith	0
4	Willy	Hernandez	0
5	Franco	Potts	0
6	Len	Lamos	0
7	Joseph	Kelly	0
8	Arnold	Jacobson	0
9	Curt	Lane	0
10	Carol	Smith	0
11	Tom	Jacobs	0
12	George	Kelly	0
13	Jack	Kyne	0
14	Mark	Kyne	0
15	Mike	Jacobson	0
16	Arnold	Uma	0
17	George	Potts	0
18	Tom	Damer	0
19	Curt	Lamos	0
20	Carol	Ramos	0
21	Joseph	Karnes	0
22	Jim	Smythe	0

Date In: 01/02/2009
 Time In: 9:00 AM
 Date Out: 01/02/2009
 Time Out: 5:00 PM
 Shift Hours: 8 hours 0 mins
☐ Use job code:
☐ Use rate: 0.00
 Tips: 0
 Pieces: 0
 Parts: 0
 Break Type: <<None>>
☐ Individual is clocked in
☐ Time sheet entry
☒ Force Overtime 1
☒ Force Overtime 2
☐ Disable Auto Deduct
☐ Disable Segment Minimum

Preview Criteria Add Close

2. Begin by selecting an employee from the employee list by clicking on them to highlight the record. If you need to add the same record for a group of employees you can select (highlight) them using the Shift key or Ctrl key.
3. Next, make any required edits to the shift fields on the right of the screen. To override the pay rate, check the option to 'Use rate' and enter the desired rate.
4. Save your entry by pressing **Add** (or **Close** if you wish to return to exit the Quick Add process without saving your entry).



If you do not check the option 'Use job code' and specify a job code, the employees default job code will be used.

9.1.2.3. Adding a Shift via "Global Record Addition"

1. From the TimeClock Manager Main Menu select "Employee", and then select "Global Record Addition". The Global Record Addition screen will display with required shift fields. It will automatically display with today's date and default times populated.

2. Next, make any required edits to the shift fields on the right of the screen. To use the individuals default rate, check the option to 'Use individuals pay rate for the selected job code'.
3. To process the shift and have them added, click on the Process Button.



By default, the system will add the shifts for all employees. To configure the system to only add in the hours for selected employees, you will need to set the Criteria. To set the Criteria, click on the Criteria button and specify which employees to include/exclude.



You can add in hours for more than one day at a time by setting the Number of consecutive days to add these hours. You can add up to 14 days. This is helpful in adding sick, vacation, or PTO time for an employee. An example would be to specify the Criteria for only one employee, and then setting consecutive days for 5 using the PTO job code. It will give that employee 5 days of PTO with 1 process.

9.2. The Approval Manager

The Approval Manager provides a process for both Managers and Employees to review and approve shifts (whether time was collected via a TimeClock or input manually). It also provides an avenue to place notes on a shift as part of the approval process.

1. To begin, select Approval Manager from the Employee Menu, the **Approval Manager** Screen will display.

2. Enter the dates to review in the Dates to examine section of the screen – either by entering beginning and ending dates in the From and To boxes, or by selecting a date for each field from its drop down box.
3. You can then filter the data displayed in the Approval Manager by enabling one or more of the three check boxes in the Shifts to view section *and* by using the **Criteria** button on the bottom of the screen.
 - View shifts that do not have employee approval/management approval – if enabled, only those shifts that have not already been approved by both Manager and Employee will display on the screen.
 - Show only shifts that require approval based on the employee information – if enabled, only employees whose shifts are set to require approval before a week is closed will display (see Section 6.1.12 of this guide for setting approval requirements at the employee level).
4. Press the **Criteria** button to filter the display by employee number range, job codes, et cetera.
5. Once these selections have been made, press the **Update** button to update the display based on your criteria.
6. To provide Management approval for a line item (shift), click in the M column on the line item – a check mark will display showing approval has been granted for the shift or you can right click using the mouse and select the option to Management Approve Selected. You can also right click with the mouse and select the option 'Management approve selected'.
7. To provide Employee approval for a line item (shift), click in the E column on the line item – a check mark will display showing approval has been granted. You can also right click with the mouse and select the option 'Employee approve selected'.

8. To exit the Approval Manager press the Close button **X** in the upper right hand corner of the Approval Manager screen.



You can select multiple employees to approve/disapprove their shifts by using the Shift key and selecting a group or holding the Ctrl key down and selecting multiple employees.

9.2.1. The Close Week Process (TimeClock Manager Main Menu > File > Close current week)

TimeClock Plus requires that each week be closed after all shifts and related information has been verified for the week. *This is one of the most important operations in the system* because during the process information for the current week is moved to history, accruals are calculated and posted, absent/tardy activity is recorded and cumulative totals for each employee are updated.



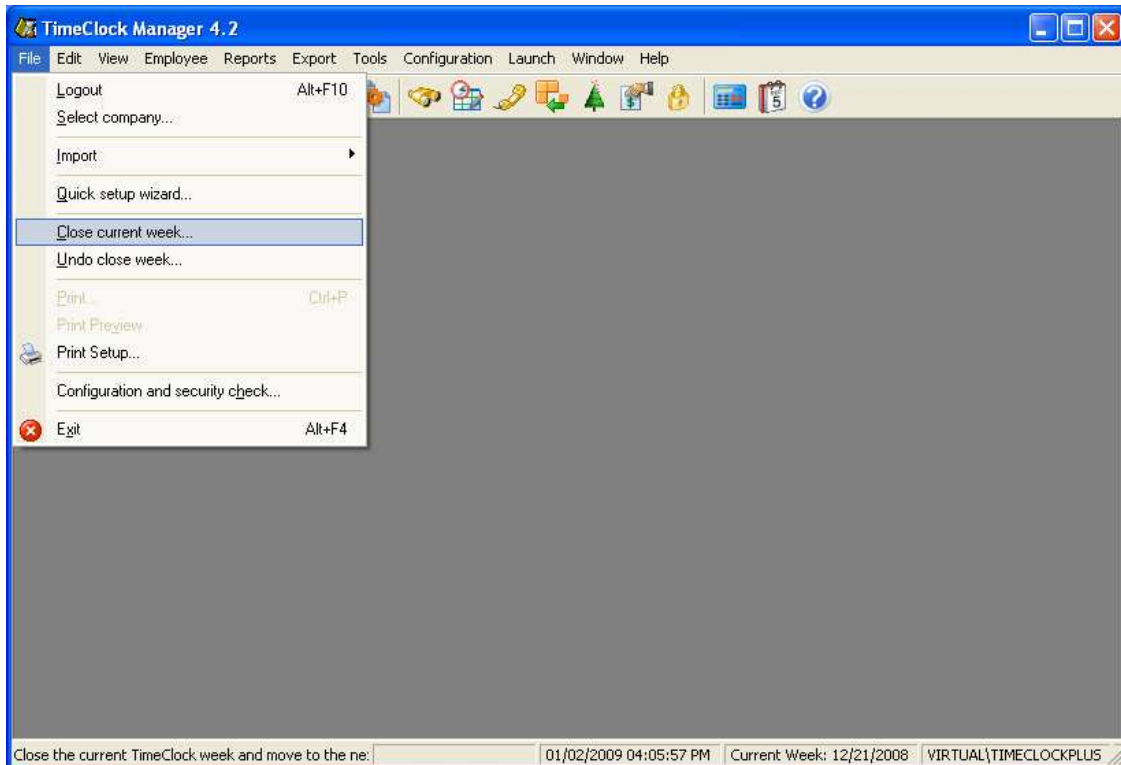
Prior to closing a week you should verify that all shifts for the week are accurate and, if necessary, make any changes using the Edit Hours function.

Although each week in the system must be closed, you are *not* required to perform the Close Week process as soon as a week has passed. The system will allow you to maintain up to multiple weeks of data in the system; however, please note the following:

1. It is recommended that you perform the close week process on a regular basis or else accrual and cumulative information displayed in the system and printed on reports will not be current.
2. If several weeks are left open, you should close multiple weeks in order for calculations to be correct and current.

To perform the Close Week process:

1. From the TimeClock Manager Main Menu, select “File” then “Close current week” from the drop down menu.



2. The system will provide a warning message containing the week being closed. If this is the week you wish to close, press **Yes** to proceed. If not, press **No** to halt the close week process.

Once the Close Week process has been completed, all balances for accrual totals as well as absent/tardy statistics will be updated for each employee for that weeks data.



If multiple weeks are open, you should perform the close week operation until it is current in order to reflect the balances more accurately.

9.3. Performing Global Processes

Often you will need to perform a process for all employees in the TimeClock system (or maybe to a selected group of employees), such as add a job code, clock all employees in, or add a shift. Two processes are provided to accomplish these global additions in TimeClock plus – Global Modification and Global Record Addition, both found on the Employee Menu in the TimeClock Manager.

9.3.1. Global Modification

The Global Modification process provides a way to add/modify/delete job code assignments, add/remove accrual rules and change the classification code for all or a selected group of employees. This is a great time saver when a new job code has been

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developed and needs to be assigned to a group of employees, or a new accrual rule has been created and needs to be assigned to employees.

From the TimeClock Manager Main Menu, select Employee, then Global Modification. The Global Modification screen will display.

Global Modification

Action: Nothing

Job code: ***

☐ Change rate to: 0.00

☒ Code is clockable

☒ Code earns overtime

☒ Code counts toward overtime

☒ Use individual's default pay rate

☒ Code is active

☒ Code is default for individual

☐ Change entry of tracked 1 field "Tips" to: Disabled

☐ Change entry of tracked 2 field "Pieces" to: Disabled

☐ Change entry of tracked 3 field "Parts" to: Disabled

Other Changes

☐ Change classification to:

☐ Add accrual rule:

☐ Remove accrual rule:

☐ Set value for custom field:

Custom field value: Edit

Criteria Preview Process Close



The check boxes used on the Global Modification window can have up to three possible states: Checked, Unchecked, and Indeterminate (grayed out). If the Indeterminate state is selected, no changes will be made to the field for the specified code. For example, if you are modifying job code 101 for all employees but do not wish to change the Earns Overtime field for individuals that already have this code enabled, you should set the Earns Overtime check box to the indeterminate state.

9.3.1.1. Add a Job Code assignment globally:

Complete the Job Code Changes section of this screen as follows:

1. Select "Add" from the Action drop down menu.
2. Select the Job Code you wish to add from the drop down box to the right of the Job Code field.
3. If you wish to set a standard rate for this Job Code for all employees affected by the global addition, enable the Change rate to box and enter the hourly rate.
4. Enable any of the three tracked fields for this job code by enabling the tracked field line item and selecting the method of collection from the drop-down box to the right.

- Using the **Criteria** button on the bottom of the screen, designate which employees to add the job code to (via employee ID number, classification, et cetera)

Criteria

Standard Fields:

- ☐ Filter by individual's number to: Include 0-999999999
- ☐ Filter by classification to: Include 0-99999999
- ☐ Filter on default job code to: Include 0-999999999
- ☐ Filter on hire date to include from: 01/01/1980 to 01/02/2009
- ☐ Filter on days since hire to include from: 0 to 99999999
- ☐ Filter on individual's manager to include: No manager assigned
- ☐ Filter on department: Equals
- ☒ Exclude suspended individuals
- ☒ Exclude terminated individuals
- ☐ Exclude salaried individuals

Custom Fields:

- Custom field: <<< Not Used >>> Equals
- Custom field: <<< Not Used >>> Equals
- Custom field: <<< Not Used >>> Equals

OK Cancel Preview Load Save Default

- Press the **Preview** button to preview the affects of your record addition, including any conflicts or exceptions that will result. The Add will not process.
- To perform the global modification, press the **Process** button (or **Close** button to exit without performing the global modification).

9.3.1.2. To Remove a Job Code assignment globally:

Complete the Job Code Changes section of this screen as follows:

- Select the "Delete" option from the **Action** drop down menu.
- Select the Job Code you wish to remove from the drop down box to the right of the Job Code field.
- Using the **Criteria** button on the bottom of the screen, designate which employees to remove the job code from (via employee ID number, classification, etc.).
- Press the **Preview** button to preview the affects of your record addition, including any conflicts or exceptions that will result. The Add will not process.
- To perform the global modification, press the **Process** button (or **Close** button to exit without performing the global modification).

9.3.1.3. Modify Settings for an Existing Job Code globally:

Complete the Job Code Changes section of this screen as follows:

1. Select "Modify" from the Action drop down menu.
2. Select the Job Code you wish to Modify from the drop down box to the right of the Job Code field.
3. Indicate the modification you wish to make:
 - To set a standard rate for this Job Code, enable the Change rate to box and enter the hourly rate.
 - To change the clockable or overtime settings for this job code enable the line item required.
4. Using the **Criteria** button on the bottom of the screen, designate which employees to add the job code to (via employee ID number, classification, etc.).
5. Press the **Preview** button to preview the affects of your record modification, including any conflicts or exceptions that will result. The Add will not process.
6. To perform the global modification, press the **Process** button (or **Close** button to exit without performing the global modification).

9.3.1.4. Add or Remove an Accrual Rule globally:

In order to add or remove an accrual rule:

1. Enable the Add Accrual Rule or Remove Accrual Rule line.
2. Select the Accrual Rule to add or remove from the drop down menu to the right of the Add or Remove line.
3. Using the **Criteria** button on the bottom of the screen, designate which employees to add the job code to.
4. Press the **Preview** button to preview the effects of your record modification, including any conflicts or exceptions that will result. The Add will not process.
5. To perform the Add or Remove process, press the **Process** button (or **Close** button to exit without performing the global modification).

9.3.1.5. Change Classification Code globally:

To change the Classification Code globally:

1. Enable the Change Classification to line.
2. Enter the Classification Code to apply in the box on the line.
3. Using the **Criteria** button on the bottom of the screen, designate which employees to assign the Classification code to.
4. Press the **Preview** button to preview the affects of your record modification, including any conflicts or exceptions that will result. The change will not process.
5. Press the **Process** button to perform the change (or **Close** button to exit without performing the global modification).

9.3.1.6. Set a value for custom field globally:

To set a value for a custom field globally:

1. Enable the option to Set value for custom field.
2. Choose the custom field from the drop down list.



The Custom Field must be created first before you are able to set a value.

3. Specify the new Custom Field value by clicking on the Edit button and entering the value in the text field.
4. Click the Ok button to save the value.
5. Press the **Preview** button to preview the affects of your record modification, including any conflicts or exceptions that will result. The change will not process.
6. Press the **Process** button to perform the change (or **Close** button to exit without performing the global modification).



Only Custom Fields pertaining to an employee can be set from this location.

9.3.2. Global Addition of a Shift Record

The most popular use for this process is to add a shift for holidays or meetings that were attended by all or a group of employees. To globally add a shift record or clock employees in/out:

From the TimeClock Manager, select Employee, then Global Record Addition. The **Global Record Addition** screen will display.

There are three sections on this screen that should be completed as follows:

9.3.2.1. Required Fields Section (all fields in this section must be completed before the record addition can be performed).

1. Enter the date and time for the clock in and clock out of the shift to be added. If you adding a shift that is to remain clocked in, place a check in the Leave clocked in box and only input the date and time in.
2. Select the Job Code for this shift from the drop down box to the right of this field.
3. If you want to apply the same hourly rate to all employees for this record addition, enter that rate in the Rate edit field.
4. If needed, click on the **Extra** button to set options to disable the auto-deduction for the shift being added or to force overtime for the shift.

9.3.2.2. Optional Fields Section- If you would like to add tracked information for this shift, enter these items in the appropriate fields of this section.

1. Use individuals pay rate for the selected job code – if enabled, the rate each employee is assigned for the selected job code will be used when adding the record. If not enabled, the rate specified in this dialog will be used for all employees regardless of their specified rate for the selected job code.
2. Number of consecutive days to add these hours – if greater than 1, these hours will be added to the number of days designated.

Use the **Criteria** button on the bottom of the screen to designate which employees to apply the record addition to (via employee ID number, et cetera).

Press the **Preview** button to preview the effects of your record addition; any conflicts or exceptions will display. The record addition will not actually process when previewing.

To perform the global record addition, press the **Process** button.

9.4. Reporting

(TimeClock Manager Main Menu > Reports)

All standard reports are accessed and run from the TimeClock Manager Main Menu. Most are customizable, including the ability to change the report title and include/exclude non-essential data. In addition, the **Criteria** Button is available when running reports to allow for the filtering of employees to be included in the report.

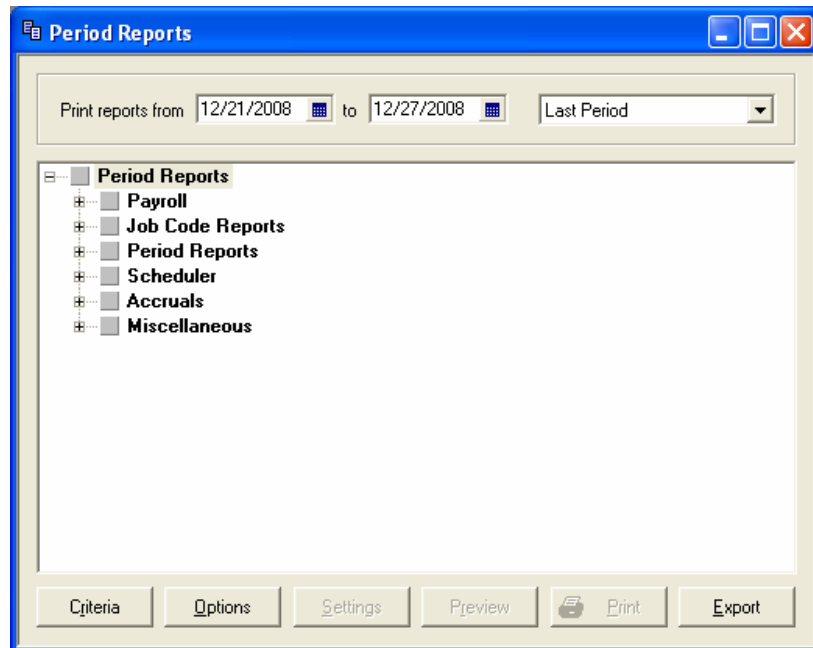


The standard footer for all reports was set up during initial configuration of the system. It can be modified via the TimeClock Manager Main Menu > Configuration > Preferences > Footers.

9.4.1. Pay Period Reports

Pay Period Reports are categorized into several different sections, as follows:

- ✓ Payroll Reports
- ✓ Job Code Reports
- ✓ Period Reports
- ✓ Scheduler Reports
- ✓ Accrual Reports
- ✓ Miscellaneous Report



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9.4.1.1. To **Print** or **Preview** a Pay Period report:

1. Enter the date range to include in the report (or select the date range from the drop down menu to the right).
2. Click on the report to select it. Press the Preview button if you would like to preview it on the screen.
3. To customize the report:
 - Press the **Settings** button to access the settings screen for the report. You can then input a new report title and enable other options for this specific report (available settings differ for each report).

Complete Payroll Report

Report title: Complete Payroll Report

<input type="checkbox"/> Print tracked fields when applicable	<input type="checkbox"/> Flag hours worked on Saturday
<input checked="" type="checkbox"/> Print rate of pay for each entry (if rates are assigned)	<input type="checkbox"/> Flag hours worked on Sunday
<input checked="" type="checkbox"/> Print id number at top of page	<input type="checkbox"/> Flag hours worked on seventh consecutive day (when configured)
<input checked="" type="checkbox"/> Print export code at top of page	<input type="checkbox"/> Flag hours marked for holiday pay
<input checked="" type="checkbox"/> Print social security number at top of page	<input type="checkbox"/> Flag shifts earning premium pay (e.g. Holiday)
<input type="checkbox"/> Print department at top of page	<input type="checkbox"/> Flag shifts that have been edited or manually added
<input checked="" type="checkbox"/> Print job code breakdown at bottom of page	<input checked="" type="checkbox"/> Shade alternating date groups
<input checked="" type="checkbox"/> Print signature line at bottom of report	<input checked="" type="checkbox"/> Skip single line between date groups
<input checked="" type="checkbox"/> Print break column if breaks are present	
<input type="checkbox"/> Print individual approval check mark	
<input type="checkbox"/> Print management approval check mark	
<input type="checkbox"/> Print shift notes when available	
<input type="checkbox"/> Print shifts with breaks in red	
<input checked="" type="checkbox"/> Print day of week on each line	

Page Info OK Cancel

- Press **OK** to save your new settings and return to the Period Report screen.

9.4.1.2. Report Options

Press the **Options** button and enable/disable the settings for the reports:

The **Formatting** tab – controls formatting of time, hour, and name display.

Period Report Options

Formatting | Miscellaneous | Print Options

Time format

- ☒ Full Time - HH:MM PP (4:30 PM)
- ☐ Military - HH:MM (16:30)
- ☐ Military - HHMM (1630)
- ☐ Decimal - HH.HH (16.50)

Hour format

- ☒ Minutes (5 hours 15 minutes = 5:15)
- ☐ Hundredths (5 hours 15 minutes = 5.25) Precision:

Name format

- ☒ Full Name (John Q. Doe)
- ☐ Partial (J. Doe)
- ☐ Last, First (Doe, John Q.)

☒ Normalize names to same case (i.e. JOHN DOE=John Doe)

OK Cancel Help

Time format – you can specify the time format for the reports and how they will be displayed on the reports.

Full time – if enabled, the time on the reports will be shown in HH:MM PP, such as 4:30 PM.

Military – if enabled, the time on the reports will be shown as HH:MM, such as 16:30.

Military – if enabled, the time on the reports will be shown as HHMM, such as 1630.

Decimal – if enabled, the time on the reports will be shown as HH.HH, such as 16.50.

Hour format – you can specify the hour format for the reports and how they will be displayed on the reports.

Minutes – if enabled, the hours will display as hours and minutes with a colon separating hours: minutes, such as 4:30



If you are viewing time in hours:minutes format, and you try to add the hours up manually on a standard calculator, the time will not be added correctly. For example, if you add $1:40 + 1:40 = 3:20$, not $2:80$.

Hundredths – if enabled, the hours will display as hours and minutes with a decimal separating hours.minutes, such as 4.50.

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Name format – you can specify different formats for how the employee name will be displayed on the reports.

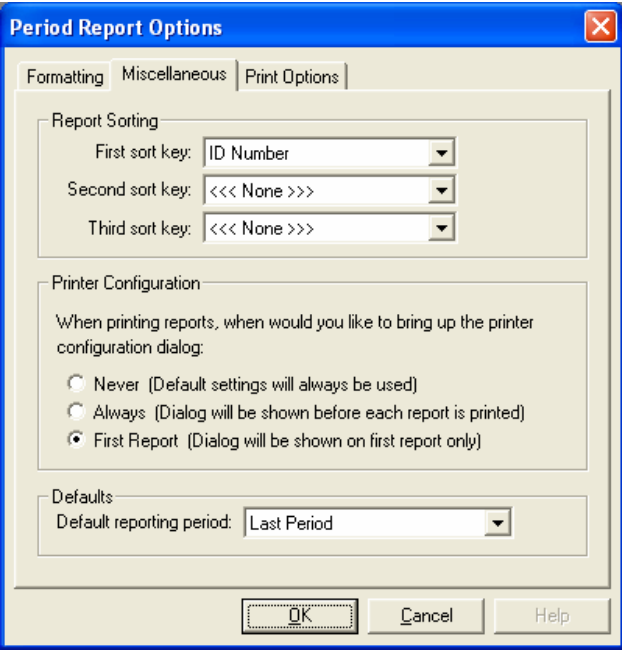
Full Name – if enabled, the name will show in its entirety, such as John Q. Doe.

Partial – if enabled, the name will show first initial and last name, such as J. Doe.

Last, First – if enabled, the name will show last name, first name such as Doe, John Q.

Normalize names to same case – if enabled, the names will all be the same case. For example, JOHN DOE = John Doe. This method is not always reliable for names such as McDonald or McMurry where individual words are mixed case.

The **Miscellaneous** tab – contains settings for sorting the report and configuring the printer, and Report defaults.

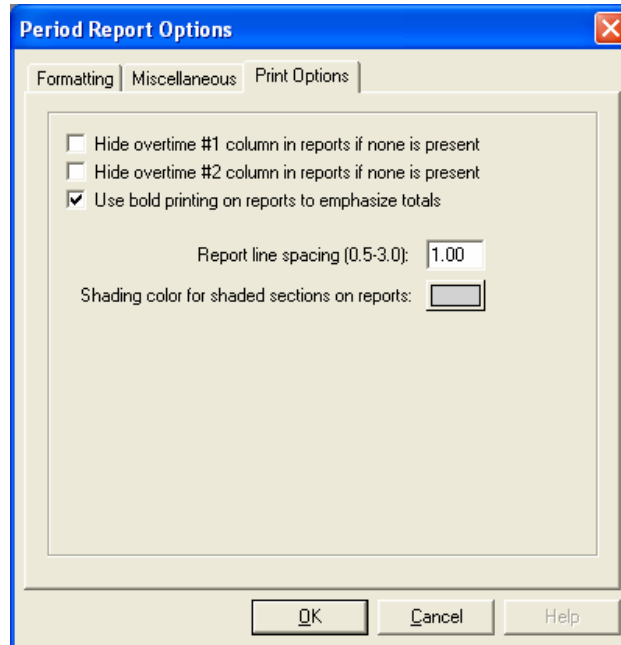
The image shows a screenshot of a software dialog box titled "Period Report Options". It has three tabs: "Formatting", "Miscellaneous" (which is selected), and "Print Options". The "Miscellaneous" tab contains three sections. The "Report Sorting" section has three dropdown menus: "First sort key:" set to "ID Number", "Second sort key:" set to "<<< None >>>", and "Third sort key:" set to "<<< None >>>". The "Printer Configuration" section has a text label "When printing reports, when would you like to bring up the printer configuration dialog:" followed by three radio button options: "Never (Default settings will always be used)", "Always (Dialog will be shown before each report is printed)", and "First Report (Dialog will be shown on first report only)". The "First Report" option is selected. The "Defaults" section has a label "Default reporting period:" followed by a dropdown menu set to "Last Period". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

Report Sorting – from the drop down menu specify which field you would like the reports to be sorted by. Not all reports adhere to this sorting order. For example, it is not possible to sort a job code report by employee number because employee information is not displayed.

Printer Configuration – specify when you would like to print up the printer dialog box.

Defaults – from the drop down menu specify the default reporting period. This is the date range that shows on the reports screen, by default.

The **Print Options** tab - contains options for bolding, line spacing, and shading on the report.



Hide overtime 1 column in reports if none is present – when enabled, if you run a report that does not have any overtime 1, the overtime 1 column does not show on the report.

Hide overtime 2 column in reports if none is present – when enabled, if you run a report that does not have any overtime 2, the overtime 2 column does not show on the report.

Use bold printing on reports to emphasize totals – if enabled, totals will print in bold.

Report line spacing – this is where you specify the spacing between each line on your reports.

Shading color for shaded sections on reports – you can specify a different color than default for shaded areas on reports.

1. Using the **Criteria** button on the bottom of the Period Reports screen, designate which employees to include in the report.
2. Press the **Preview** button again or the **Print** button to send the report to the printer.



To print a report, you must have it selected (have a check in the box to the left of the report) to print that specific report.



If you right click on the report, you have the options to preview the report, print the report, print to file, print to HTML or change the report settings.

3. To exit the Pay Period Reports screen click the close window **X** button in its upper right hand corner.
4. Press the **Export** button to be taken to the standard export process. (refer to section 9.5 for more information on exporting).

9.4.2. The Approaching Overtime Report (TimeClock Manager Main Menu > Reports> Approaching overtime)

The Approaching Overtime Report is used to monitor employee hours worked and determine who is close to entering overtime.

Approaching Overtime Report

Printed on 01/02/2009 at 4:43 PM for the week of 12/28/2008

Number	Name	Pay Type	Reg	Ovt	Forced Ovt	Reaches Overtime In
10	Carol Smith	Weekly	39:00	0:00	0:00	1 hours 0 minutes

To print the report:

1. Enable one or all of the parameter statements depending on whether your concern is weekly, daily, bi-weekly, or salaried overtime. For each enabled statement, enter how many minutes from overtime the employee must be in order to be included in the report.
2. Using the **Criteria** button on the bottom of the screen, designate which employees to include in the report.
3. To send the report to your default printer, press the **Print** button where you can preview the report, change printer settings, or complete the print process.
4. To exit the Print Information screen click the **Close** button on the Approaching OT Report screen.

9.4.3. The Employee Job Information Report (TimeClock Manager Main Menu > Reports > Pay Period > Employee Job Information)

The Employee Job Information Report provides a listing of the employees currently assigned to selected job codes and can also be formatted to include the hourly rate for each job code, rate change dates, etc.

Job/Rate Report **Printed on 01/05/09 08:52:00**

Number	Full Name	Class	Export Code	SSN	Job Code	Description	Rate	Raise Date
8	Arnold Jacobson	0		111-22-3333	400*	Assembly II	14.71	
9	Curt Lane	0		111-22-3333	300*	Assembly I	13.00	
10	Carol Smith	0		111-22-3333	200*	Engineering	19.00	

To print the report:

1. Enable one or all of the options for the report depending on the items you wish to include in the report.
2. Enter the job codes to include in the Employee Job Information Report by selecting them from the drop down menu to the right of the Print only these codes field or by typing them into the field with a comma separating each additional job code.
3. Using the **Criteria** button on the bottom of the screen, designate which employees to include in the report.
4. To send the report to your default printer, press the **Print** button where you can preview the report, change printer settings, or complete the print process.
5. To exit the Job Information report screen click the **Close** button on the screen.

9.5. Exporting Data (TimeClock Manager Main Menu > Export)

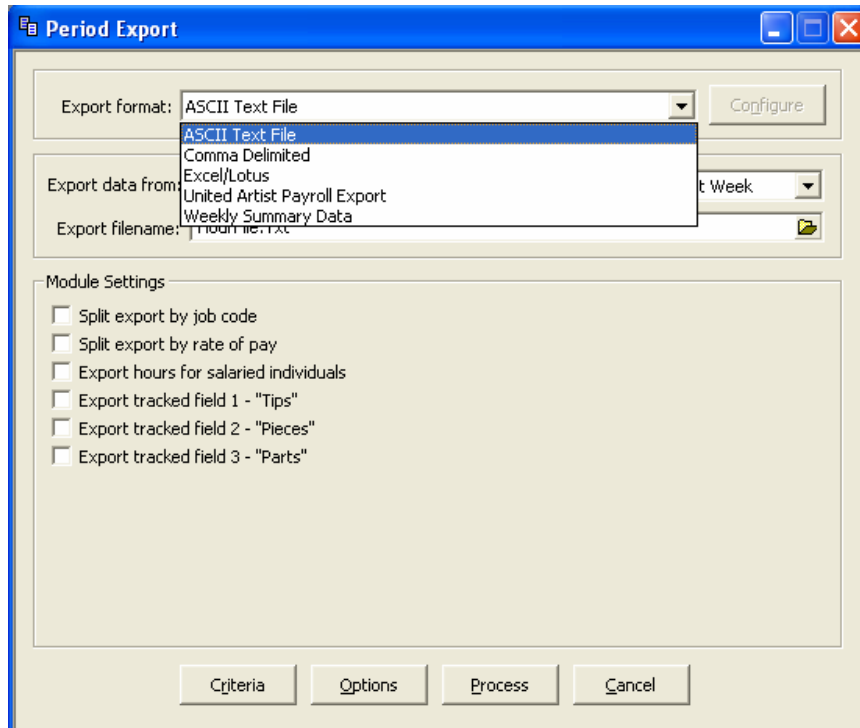
TimeClock Plus provides the ability to export various fields of data in several different formats for use with other applications such as payroll, Excel, and Access.

9.5.1. Exporting Data for Payroll Processing (TimeClock Manager Main Menu > Export > Pay Period)

All data exports for use in processing payroll are accessed from the Export, Pay Period Menu. Exports are produced in multiple formats, including:

- ✓ Standard Pay Period Export:
 - ASCII text file (industry standard format)
 - Comma delimited (industry standard format)
- ✓ Customized for your payroll package (requires purchase of a Payroll Module from DMI)

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9.5.1.1. The Standard Pay Period Export (does not require a DMI Payroll Module)

The Standard Pay Period Export process produces a file containing 11 fields of data for each employee record. This export can be produced in an ASCII text file or comma delimited format. Layouts for the standard pay period export files are as follows:

- Employee ID number
- Export Code
- SSN
- Job Code
- Rate
- Regular Hours
- Overtime 1 Hours
- Overtime 2 Hours
- Tracked Field 1
- Tracked Field 2
- Tracked Field 3



When exporting pay period data, the codes stored in the "Export As" field for job codes will be used, not the standard job code and cost code identifier. Also, if an Export Code was entered in the employee's personal information tab, this code will appear in addition to the employee ID number in each record.

9.5.1.2. To export payroll data in ASCII or Comma Delimited text file format:

1. Select "Pay Period" from the Export Menu.
2. Select "ASCII TEXT FILE" or "Comma Delimited" from the Export Format drop down box.
3. Enter the date range to include in the export (or select the date range from the drop down list to the right of each date field).
4. Enter the name of the export file to be created, including the location you want it stored (for example, C:\paydata\nov1630.txt). If you are writing over an existing export file select it using the file open icon to the right of the Export Filename box.
5. Enable any of the options for the export in the Module Options section, depending on the items you wish to include in the export file.
6. Using the Criteria button on the bottom of the Period Export screen, designate which employees to include in the report.
7. Press the Options button if you need to change the sort order and/or modify the default period for the export.
8. To begin the Export process, press the Process button (or the Cancel button to exit the screen without producing an export file).



If any errors were encountered during the export, an exceptions list will appear. It is recommended that you view the exceptions to try to determine what caused the error.

9. To exit the Period Export, click the Cancel button on the screen.

9.5.2. Exporting Payroll Data via a Payroll Export Module

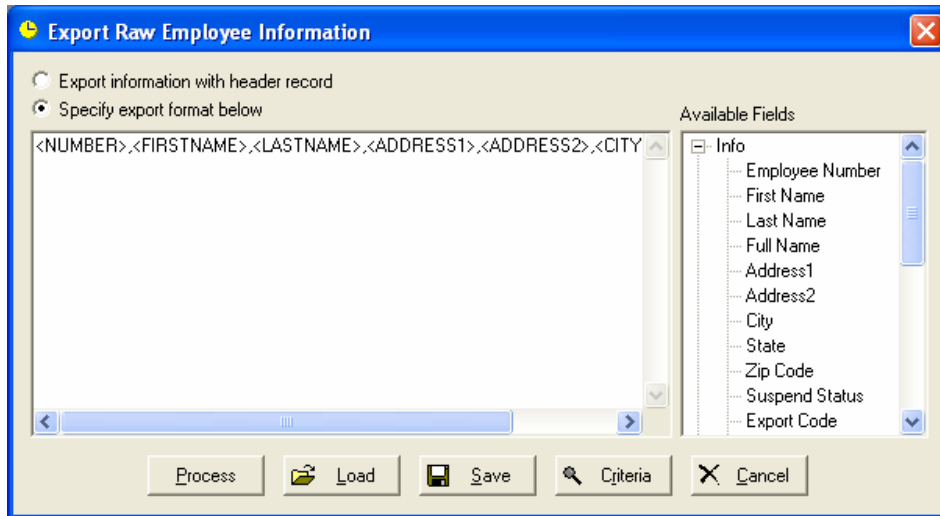
Various payroll software packages allow importing of hours. In most cases, if the payroll software can import hours, then TimeClock Plus can export the hours into the specific file layout. This does require an additional module. For a complete list of available modules, contact TimeClock Plus Sales.


If you have an Export Module you should have received documentation that is specific to the configuration of that module. You should refer to that documentation for the module configuration and the export process. You may also contact TimeClock Plus Technical Support for further assistance on the export module configuration and export process.

9.5.3. Exporting Employee Personal Info (TimeClock Manager Main Menu > Export > Employee Information)

TimeClock Plus provides the ability to export many fields of employee personal data including fields found on the Info, Cumulative and Miscellaneous tabs. To export personal information to a file:

1. Select "Employee Information" from the Export Menu or from Export Employee Information from the Employee Menu in TimeClock Manager.



2. You can produce an export using a previously saved Export Layout by pressing the **Load** button and selecting the layout from the available list.
3. Fields that can be included in the export file appear in the Available Fields section of the screen. Press the  beside Info, Cumulative, and Miscellaneous to expand the list of individual fields available from each of these tabs.
4. To include a field in the export, double click on it in the Available Fields list. It will appear in the Export Layout section if successfully added to the export. Once a format is specified, place a carriage return at the end of the line so that the export will put all of the export information on separate lines.



If you do not enter a carriage return all of the information will appear on one line.



Once a field is entered into the Export Layout you can adjust its formatting by double clicking on the field name in the export layout. You can then modify its width and justification.

5. To delete a field from the Export Layout, place the cursor in front of the field and press the **Delete** key on your keyboard.
6. To save a new Export Layout format, press the **Save** button and enter the name of the Export Layout file, including file location.
7. Using the **Criteria** button on the bottom of the Export Raw Employee Information screen, designate which employees to include in the report.
8. To begin the Export process, press the **Process** button (or the **Cancel** button to exit the screen without producing an export file).
9. A box will appear that asks where you want to save the file and what you want to save the file as. So set the location and enter the filename of the file you want created.
10. To exit the Personal Info Export, click the **Cancel** button on the screen.

9.5.4. Exporting Job Code Information (TimeClock Manager Main Menu > Export > Job Codes)

TimeClock Plus provides the ability to export a list of Job Codes and their settings from the system. To export job code information to a file:

1. Select "Job Codes" from the Export Menu or click on the Export button in the Master Job Code list.
2. You can produce an export using a previously saved Export Layout by pressing the **Load** button and selecting the layout from the available list.
3. Fields that can be included in the export file appear in the Available Fields section of the screen. Press the **+** beside Information, Breaks, Auto Out, and Rounding and Minimums to expand the list of individual fields available.
4. To include a field in the export, double click on it in the Available Fields list. It will appear in the Export Layout section if successfully added to the export. Once a format is specified, place a carriage return at the end of the line so that the export will put all of the export information on separate lines.



If you do not enter a carriage return all of the information will appear on one line.



Once a field is entered into the Export Layout you can adjust its formatting by double clicking on it. You can then modify its width and justification.

5. To delete a field from the Export Layout, place the cursor in front of the field and press the **Delete** key on your keyboard.
6. To save a new Export Layout format, press the **Save** button and enter the name of the Export Layout file, including file location.
7. Using the **Criteria** button on the bottom of the Export Raw Employee Information screen, designate which employees to include in the report.
8. To begin the Export process, press the **Process** button (or the **Cancel** button to exit the screen without producing an export file).
9. A box will appear that asks where you want to save the file and what you want to save the file as. So set the location and enter the filename of the file you want created.
10. To exit the Job Code Export, click the **Cancel** button on the screen.

9.5.5. Exporting Raw Hours (TimeClock Manager Main Menu > Export > Raw Hours)

TimeClock Plus provides the ability to export raw hours in the system. To export raw hours to a file:

1. Select "Raw Hours" from the Export Menu or by selecting Export Raw Hours from the Employee Menu in TimeClock Manager.
2. You can produce an export using a previously saved Export Layout by pressing the **Load** button and selecting the layout from the available list.
3. Fields that can be included in the export file appear in the Available Fields section of the screen. Press the **+** beside Employee Info, Shift Info, and Shift Flags to expand the list of individual fields available.
4. To include a field in the export, double click it in the Available Fields list. It will appear in the Export Layout section if successfully added to the export. Once a format is made, place a carriage return at the end of the line so that the export will put all of the export information on separate lines.



If you do not enter a carriage return all of the information will appear on one line.



Once a field is entered into the Export Layout you can adjust its formatting by double clicking on it. You can then modify its width and justification.

5. To delete a field from the Export Layout, place the cursor in front of the field and press the **Delete** key on your keyboard.
6. To save a new Export Layout format, press the **Save** button and input the name of the Export Layout file, including file location.
7. Using the **Criteria** button on the bottom of the Export Raw Employee Information screen, designate which employees to include in the report.
8. To begin the Export process, press the **Process** button (or the **Cancel** button to exit the screen without producing an export file).
9. A box will appear that asks where you want to save the file and what you want to save the file as. So set the location and enter the filename of the file you want created.
10. To exit the Raw Hours Export, click the **Cancel** button on the screen.

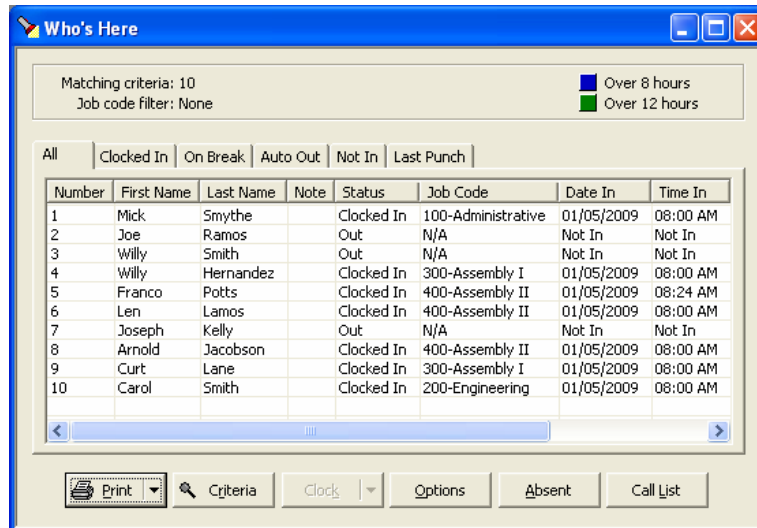
9.6. Attendance and Overtime Monitoring Tools

TimeClock Plus includes several tools to help you monitor employee attendance in *Real Time*. These tools provide Managers with the ability to watch people clock in/out from a PC (to monitor tardiness and absence) and to watch hours worked to avoid overtime.

9.6.1. Who's Here

(TimeClock Manager Main Menu > Tools > Who's Here)

The Who's Here tool is used for monitoring employees in real time – whether they are clocked in, on break, not clocked in, automatically clocked out, et cetera.



- To access this option, select the Tools Menu from the TimeClock Manager Main Menu, then select "Who's Here". The Who's Here Screen will display with the following tabs of attendance information and button options:

9.6.1.1. The **All** Tab

This tab provides a sortable listing of employees, with their current status, Job Code, and clock information.

9.6.1.2. The **Clocked In** Tab

This tab provides a sortable listing of employees, who are currently clocked in (does not include those employees currently On Break).

9.6.1.3. The **On Break** Tab

This tab provides a sortable listing of employees who are currently clocked On Break.

9.6.1.4. The **Auto Out** Tab

This tab provides a sortable listing of employees who have been automatically clocked out due to the Auto Out settings of a particular job code. For the information to show on the Auto Out tab, the clock out time should be after the current time.

9.6.1.5. The **Not In** Tab

This tab provides a sortable listing of all active employees who are not clocked in.

9.6.1.6. The **Last Punch** Tab

This tab provides a sortable listing of last punches and the current status for all active employees.

1. To filter the information displayed on the tabs (by Job Code, or Classification for example), press the **Criteria** button on the bottom of the screen to set your filter (press **OK** to save criteria for this display). The displays will update when the Criteria is saved.
2. To print the contents of any of the tabs, while the tab is displayed press the **Print** button. This allows you to preview the report, change printer settings, or complete the print process.
3. To access the Who's Absent screen (this requires a schedule) press the **Absent** button.
4. To access the Call List screen, press the **Call List** button.
5. To exit the Who's Here screen click the close window **X** button in its upper right hand corner.

9.6.2. Who's Absent

(TimeClock Manager Main Menu >Tools > Who's Absent)

The Who's Absent option is used to quickly see who is not currently on the clock though they are scheduled to be.



Employee schedules must have been created in the TimeClock Scheduler for this option.

Number	First Name	Last Name	Scheduled Time	Job Code	Phone Number
2	Joe	Ramos	8:00 AM-5:00 PM	200-Engineering	
3	Willy	Smith	8:00 AM-5:00 PM	300-Assembly I	
7	Joseph	Kelly	8:00 AM-5:00 PM	300-Assembly I	

1. To access this option, select the Tools Menu from the TimeClock Manager, then select "Who's Absent". The Absent List screen will display with all employees who are not clocked in though they are scheduled to do so.



Employees that leave work early may appear in the Who's Absent even though they are not absent. This is because the system checks to see if they are clocked in compared to their schedule.

2. To filter the list (by employee number, or Classification for example), press the **Criteria** button on the bottom of the screen to set your filter. Press **OK** to save your criteria then press **Update** on the Absent List screen to update the screen display.
3. To print the Absent List, press the **Print** button. This allows you to preview the report, change printer settings, or complete the print process.
4. To exit the Absent List screen click the close window **X** button in its upper right hand corner.



The Absent List is different from the Absent Report because the Absent List looks at who is scheduled to be clocked in at the time the list is being viewed. The Absent Report looks at who was not clocked in within the time specified from their scheduled time. The settings for the Absent Report can be found by setting the Absent settings in TimeClock Manager defaults (refer to section 5.3 for defaults).

9.6.3. Attendance Monitor

(TimeClock Manager Main Menu >Tools > Attendance Monitor)

The Attendance Monitor is used to view employee attendance against their schedule during a specific time period on a specific day.



Employee schedules must be created in the TimeClock Scheduler if you are using a filter that uses schedules.

Number	First Name	Last Name	Time In	Time Out	Break Type	Job Code
1	Mick	Smythe	01/05/2009 08:00 AM	01/05/2009 05:00 PM		100-Administrativ
2	Joe	Ramos	01/05/2009 08:00 AM	01/05/2009 05:00 PM		200-Engineering
3	Willy	Smith	01/05/2009 08:00 AM	01/05/2009 05:00 PM		300-Assembly I
4	Willy	Hernandez	01/05/2009 08:00 AM	01/05/2009 05:00 PM		300-Assembly I
5	Franco	Potts	01/05/2009 08:00 AM	01/05/2009 05:00 PM		400-Assembly II
6	Len	Lamos	01/05/2009 08:00 AM	01/05/2009 05:00 PM		400-Assembly II
7	Joseph	Kelly	01/05/2009 08:00 AM	01/05/2009 05:00 PM		300-Assembly I

To access the Attendance Monitor option:

1. Select the Tools Menu from the TimeClock Manager, then select "Attendance Monitor". The Attendance Monitor screen will display with the following input fields and button options.

Starting Time and Ending Time – select the starting date and time plus ending date and time from the Quick Pick drop down list box or manually input them.

Filter – Select the filter to apply to your attendance listing from the drop down list box to the right of this field. Filters include:

Scheduled to be working – will display all employees working who are scheduled to work during the date and time specified.

Scheduled to start segment – will display all employees working who are scheduled to start working a shift segment during the date and time specified.

Scheduled to start shift – will display all employees who are scheduled to start a shift during the date and time specified.

Started segment during period – will display all employees who started a segment during the date and time specified.

Started shift during period – will display all employees who started a shift during the date and time specified.

Worked during period – will display all employees who worked during the date and time specified.

2. To filter the listing further (e.g. by Job Code, Classification), press the **Criteria** button on the bottom of the screen to set your filter (press **OK** to save the criteria settings) then press **Update** on the Attendance Monitor screen to update the display.
3. To print the Attendance Monitor list, press the **Print** button. This allows you to preview the report, change printer settings, or complete the print process.
4. To exit the Attendance Monitor list screen click the **Close** button.

9.6.4. Call List

(TimeClock Manager Main Menu > Tools > Call List)

The Call List is used to obtain a quick listing of hours worked to date, by employee. This list assists you with making staffing decisions and calling in replacements on an individual basis or for a new shift. This is a helpful tool because in addition to providing hours worked during the week, those employees who have begun to work overtime for the week will display in **Red**. Each employee's phone number is also provided (if the phone number has been added to their Personal Information file of TimeClock Plus).



The Call List can be sorted by any of its columns, including number of hours worked, by clicking on the column header.

Call List - 01/04/2009 to 01/10/2009

Processed: 10 ■ Has overtime for week

Number	First Name	Last Name	Hire Date	Hours	Phone Number	Status	Note
1	Mick	Smythe	04/09/2002	1:51		Clocked In	
2	Joe	Ramos	12/28/1994	0:00			
3	Willy	Smith	01/20/1993	0:00			
4	Willy	Hernandez	10/24/2000	1:51		Clocked In	
5	Franco	Potts	05/28/2000	1:27		Clocked In	
6	Len	Lamos	12/12/1991	1:51		Clocked In	
7	Joseph	Kelly	11/12/1999	0:00			
8	Arnold	Jacobson	10/21/1991	1:51		Clocked In	
9	Curt	Lane	08/03/2001	1:51		Clocked In	
10	Carol	Smith	09/17/2002	1:51		Clocked In	

Print Criteria Add Note Update

1. To access this option, select the Tools Menu from the TimeClock Manager, and then select the "Call List" option. The Call List screen will display employees with their hours worked to date.
2. To filter the list (e.g. by Job Code, Classification), press the **Criteria** button on the bottom of the screen to set your filter then press the **Update** button to refresh the screen.
3. To print the Call List, press the **Print** button. This allows you to preview the report, change printer settings, or complete the print process.
4. To exit the Call List screen click the close window **X** button in its upper right hand corner.

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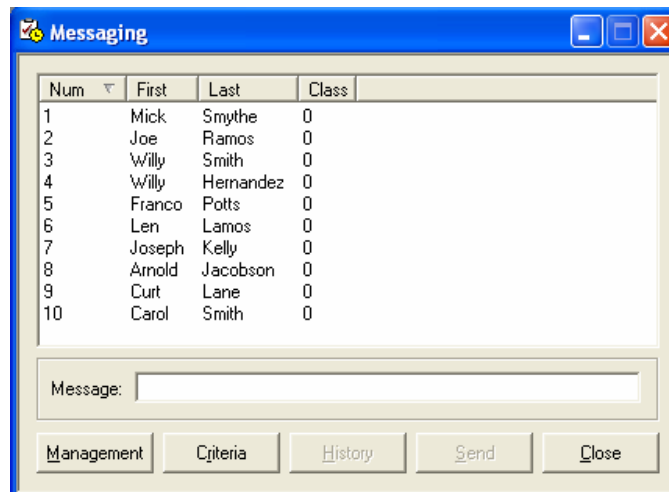
9.7. Other Features/Functions

9.7.1. Employee Messaging

Employee messaging is a popular feature of the TimeClock Plus system. It provides the ability to send messages to employees as they clock in and out and maintains a history of all messages sent and read. Messages display on the On-Screen TimeClock and RDT screen, where an employee performs a clocking operation.

9.7.1.1. To send a message to a Single Employee or Group of Employees: (TimeClock Manager Main Menu > Employee > Messaging)

1. Select the Employee Menu from the TimeClock Manager, and then select "Messaging". The Employee Messaging screen will display with a list of all employees in the system.



The employee list can be sorted by any of its columns by clicking on the column heading you wish to sort by.

2. Filter the employee list (e.g. by employee number, Classification) by pressing the **Criteria** button on the bottom of the screen.
3. Select the employee to send the message to from the list by clicking on them to highlight them. Multiple employees can be selected by holding down your CTRL key as you click on individual employees.
4. Once an employee or employee group has been selected, enter the message to send in the **Message** edit box.
5. Press the **Send** button to place the message in the message queue so that the next time the employee(s) clock in or out the message will display.
6. To exit the Messaging screen click the **Close** button.

9.7.1.2. To send a message to All Employees in the TimeClock System:
(TimeClock Manager Main Menu > Employee > Messaging)



This is a message that all employees will see at every clock operation.

1. Select the Employee Menu from the TimeClock Manager, and then select "Messaging". The Employee Messaging screen will display with a list of all employees in the system.



The employee list can be sorted by any of its columns by clicking on the column heading you wish to sort by.

2. Press the **Management** button on the bottom of the messaging screen and the Management Message box will display.
3. Enter the company-wide message to send in the **Management Message** edit box and click **OK** to save it.
4. Press the Send button so that the next time every employee clocks in or out the message will display.
5. To exit the Messaging screen click the **Close** button.

9.7.1.3. The History Button – to access a history of messages sent to an individual employee, select the employee from the list by clicking them to highlight, and then click the **History** button. The Message History will list the date and time the message was sent, the date and time it was displayed for the employee to read, and the text of the message. The Message History can be printed by pressing the **Print** button.



*Message history for an employee can also be accessed from the **Cumulative Tab** of their Personal Information. Press the **Message History** button to display all messages sent as well as times and dates they were read.*

9.8. Labor Cost Tracking

9.8.1.1. Hourly Labor Cost Breakdown

(TimeClock Manager Main Menu > Tools > Display Labor Cost)

The Labor Cost Analysis provides an hourly breakdown of hours worked and estimated labor costs in dollars and as a percentage of sales. A summary at the top of the window provides total hours, wages, sales and labor percentage.

1. To begin the display, enable the button for either **Daily Figures** or **Weekly Figures**.



In order to display labor as a percentage of sales, estimated sales must be input on a daily or hourly basis. This is done by clicking on the appropriate cell in the Sales column and keying in the amount of sales.

The image shows a 'Labor Cost Options' dialog box with a blue title bar and a close button. It contains two main sections: 'Job Codes' and 'Other options'. In the 'Job Codes' section, there are two radio buttons: 'Include all job codes in labor cost' (selected) and 'Include only selected job codes in labor cost'. Below these is a list box containing job codes: 100 - Administrative, 200 - Engineering, 300 - Assembly I, 400 - Assembly II, 1000 - Sick, 2000 - Vacation, and 3000 - Holiday. To the right of the list box are 'All' and 'None' buttons. In the 'Other options' section, there are four checkboxes: 'Highlight hourly labor percentages above' (unchecked) with a text field showing '15.00%', 'Edit sales by the hour' (checked), 'Include salaries in total wages' (unchecked), and 'Save entered sales figures' (unchecked). At the bottom are 'OK' and 'Cancel' buttons.

2. Press the **Options** button to set/modify any of the following analysis options:

A. Job Codes:

In this section of the Labor Cost Options screen, enable whether you wish to include all job codes in the analysis, or just selected job codes. If “selected job codes” is chosen, place a check mark next to each job code you wish to include in the cost. The **All** or **None** buttons can be used to quickly select or deselect all job codes in the list.

B. Other Options

Highlight hourly labor percentages above X % - if this option is enabled, any labor cost percentage greater than that specified will appear highlighted on the Labor Cost Analysis screen.

Edit sales by the hour – if enabled, this will require the input of sales on an hourly as opposed to a daily basis.

Include salaries in total wages – if enabled, the total cost for salaried employees will be added to the labor figures when determining daily and weekly labor cost.

Save entered sales figures – if enabled, sales entered will be saved and automatically recalled for further analysis (useful when estimations are used which don’t change often).

Display labor starting at what time of day – this is where you specify what time of day to begin calculating labor cost.

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3. To print the Labor Cost Analysis, press the **Print** button. This allows you to preview the report, change printer settings, or complete the print process.
4. To exit the Labor Cost screen click the close window **X** button in its upper right hand corner.



The two **<<** and **>>** buttons on the bottom right hand corner of the Labor Cost screen provide paging forwards and backwards to additional days' analysis.

9.9. Audit Trails

9.9.1. The Hour Edit Log

(TimeClock Manager Main Menu >Tools >View Hour Edit Log)

The TimeClock system maintains a file containing a record for every manual edit performed on an employee's hours. Each log record includes the employee name and ID number, when the change was made (time and date), who made the change and from which computer, and what type of change was made (add vs. delete, et cetera). The Hour Edit Log presents each log record on two lines with the actual change that was made highlighted in **Red**.

1. To display the Hour Edit Log on the screen, from the TimeClock Main Menu, select Tools then "View Hour Edit Log". A screen will display containing all edits made for the default date range (the date range will appear in the title bar of the Hour Edit Log screen).

Hour Edit Log - 01/02/2009 to 01/05/2009

View range from: 01/02/2009 to 01/05/2009 Quick select: << Manual Entry >>

Changed by: Include changes by all users

Location: Include changes at all locations

☐ Show only individuals with [] or more edits during period. (Missed punch approvals are not counted as edits)

Id	Name	Changes	Employee	Change Time/Location	User Id/Computer	Job Code	Time In	Time Out	Hours
10	Carol Smith	15	Mick Smy...	01/05/2009 9:30 AM	SUPERVISOR		<<<< Adding Record >>>>		
1	Mick Smythe	1	#1	Edit Hours	VIRTUAL	100	01/05 8:00 AM	<< Clocked In >>	
4	Willy Hernandez	1	Willy Her...	01/05/2009 9:29 AM	SUPERVISOR		<<<< Adding Record >>>>		
5	Franco Potts	1	#4	Edit Hours	VIRTUAL	300	01/05 8:00 AM	<< Clocked In >>	
6	Len Lamos	1	Franco P...	01/05/2009 9:29 AM	SUPERVISOR		<<<< Adding Record >>>>		
8	Arnold Jacobson	1	#5	Edit Hours	VIRTUAL	400	01/05 8:24 AM	<< Clocked In >>	
9	Curt Lane	1	Len Lamos	01/05/2009 9:29 AM	SUPERVISOR		<<<< Adding Record >>>>		
			#6	Edit Hours	VIRTUAL	400	01/05 8:00 AM	<< Clocked In >>	
			Arnold J...	01/05/2009 9:28 AM	SUPERVISOR		<<<< Adding Record >>>>		
			#8	Edit Hours	VIRTUAL	400	01/05 8:00 AM	<< Clocked In >>	
			Curt Lane	01/05/2009 9:28 AM	SUPERVISOR		<<<< Adding Record >>>>		
			#9	Edit Hours	VIRTUAL	300	01/05 8:00 AM	<< Clocked In >>	
			Carol Smith	01/02/2009 2:57 PM	SUPERVISOR	3000	12/26 8:00 AM	12/26 5:00 PM	9.00
			#10	Edit Hours	VIRTUAL	3000	12/26 8:00 AM	<<TimeSheet>>	8.00

Criteria History Detail Export Print Close

2. Set the date range that you would like to see data for by entering the range in the 'View range from' boxes. You may also choose some preset date ranges by choosing the range from the 'Quick select' drop options.

Changed by – this option allows you to view the edits made by a specific user.

Location – this option allows you to view the edits made at a specific location, such as the Who's Here list, Employee Edit Hours, et cetera.

Show only individuals with XX or more edits during period – if enabled, this option allows you view only those employees that have XX number of edits during the date range specified.

Criteria – you can specify certain criteria for the Hour Edit Log so that you only view certain employees based upon the criteria set.

History – the History button allows you to view the change history information for this employee. When you view the History, you can also view the shift detail, by highlighting the shift and clicking on the Detail button.

Detail – the Detail button allows you to view all of the shift information pertaining to the shift that was changed. Changes will be reflected in red.

Export – the Export button allows you to export the hour edit/change log to a file. You can specify the format and file type when you export.



The above options are great for filtering employees so that you can only view those that you want.

3. Once you have your filter options set, click on the **Refresh** button to load the information based on the new filtering options.
4. To print the currently displayed Hour Edit Log, press the **Print** button. The Print button allows you to preview the report, change printer settings, or complete the print process.

Change Log Detail Information

Date changed: 01/02/2009
Time changed: 4:42 PM
Computer used: VIRTUAL
Edit location: TimeClock Manager - Edit Hours
User Id: SUPERVISOR
Employee: 10 - Carol Smith

	Original Record	New Record
Time In:	01/02 9:00 AM	01/02 9:00 AM
Time Out:	01/02 5:00 PM	01/02 4:00 PM
Job Code:	200-Engineering	200-Engineering
Rate:	0.00	0.00
Cost Code:	N/A	N/A
Break Type:	None	None
Tracked Fields:	N/A - N/A - N/A	N/A - N/A - N/A
Missed Punch (In/Out):	No - No	No - No
Missed Punch Aprv (In/Out):	N/A - N/A	N/A - N/A

Flags: Manually added shift

Manually added shift
Shift has been manually edited

OK

9.9.2. The Override Log (TimeClock Manager Main Menu > Tools > View Override Log)

The TimeClock system also maintains a file containing a record for every time a supervisor had to perform a manual override to allow a clocking operation by an employee (due to clock restrictions). Each log record includes the employee name, where the override was performed, what operation they were attempting, when the override was made (date & time), a reason, and who performed the override and how.

1. To display the Override Log on the screen, from the TimeClock Main Menu, select Tools then "View Override Log". The Override Log Screen will display.
2. Designate the period you wish to view by selecting a begin and end date from the calendar drop downs next to the View data from: input boxes (or select a preset time period from the box to the right of these fields).
3. Press the **Filter** button to designate which of the following to include in the log:
4. Entry points to include (On-Screen TimeClock, RDT)
5. Action to include (too early, too late, over X hours, etc.)
6. Clock operations to include (clock in, clock out, etc.)
7. Override methods to include (password, biometrics, etc.)

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8. Filter the employees to include in the log (by employee number, or Classification for example) by pressing the **Criteria** button on the bottom of the screen. As you **Save** your criteria, the list will update based on your settings.
9. To print the currently displayed Override Log, press the **Print** button that allows you to preview the report, change printer settings, or complete the print process.
10. To exit the Override Log screen click the **Close** button.

9.10. Backup and Restore of System Information

9.10.1. Performing a Backup of the TimeClock Plus System

Periodically backing up your system information provides a safety net for you - the information can be restored should something happen and you lose your data (for example, due to a hard drive or system failure). A backup should be performed at regular intervals to minimize disruption to your business should a restore be required.

There are two ways to back up the TimeClock System:

9.10.1.1. Creating a backup from TimeClock Manager

1. Launch TimeClock Manager, and from the TimeClock Manager Main Menu select Tools, then "Backup System Information". The **Backup System Information** screen will display.
2. For the Server Directory, enter the directory on the server (machine hosting the TimeClock Database) that you would like the backup to be created. If you enter C:\TCBackup, then the backup will be created and placed on the server, in the C:\TCBackup directory.

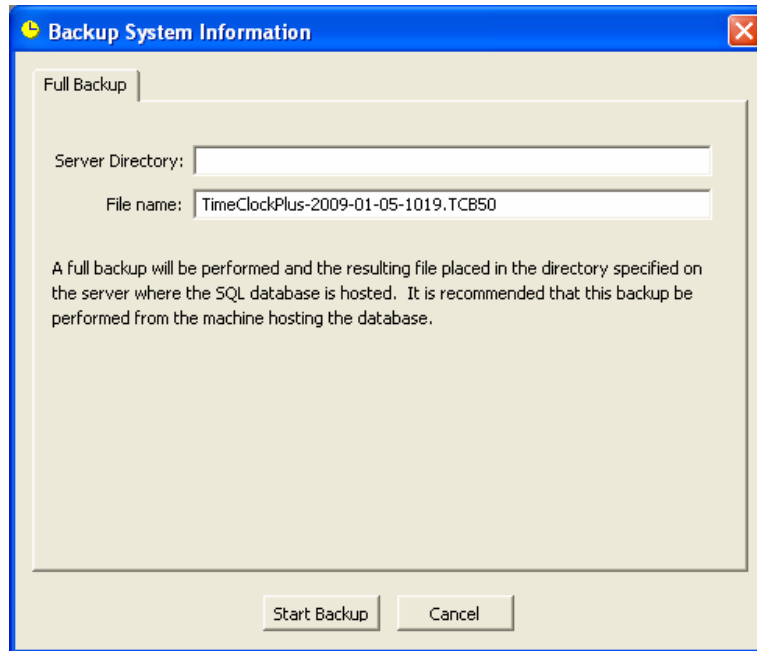


The directory specified is on the server (the machine hosting the TimeClock Database), not the local machine. So if you enter C:\TCBackup, it is referring to the C:\TCBackup directory on the server, not locally on the machine performing the backup procedure.

3. For the File name, enter the name that you would like the backup file to be named.
4. Click on the **Start Backup** button to begin the creation of the backup.

9.10.1.2. Creating a backup from TimeClock Database Manager

1. Launch TimeClock Plus Database Manager. Once you have Database Manager open, click on the **Backup** button.
2. For the Backup path and backup file name, enter the path and name that you would like the backup file to be named. For example, c:\tcbackup\TimeClockPlus-2003-11-25-1418.TCB50.
3. Click on the **Start** button to begin the creation of the backup.



9.10.2. Restoring the TimeClock Plus System from a Backup File

9.10.2.1. To restore a previously created backup:



All TimeClock applications except the Database Manager must be closed to restore the database.

1. Launch TimeClock Plus Database Manager. Once you have Database Manager open, click on the **Restore** button.
2. The Restore Database screen will appear,
 - a) Backup file – this is where you specify the backup file you wish to restore. You can either enter the path or browse to it by clicking on the folder icon.
 - b) Restore as – this is what you want the TimeClock Database to be named when you restore it.
 - c) File name – this is the name of the actual file that contains the database information.
3. Once you have the backup that you would like to restore chosen, click on the **Restore** button.



Once you press the Restore button, the existing TimeClock Database will be overwritten with the database from the backup if you name them the same name.

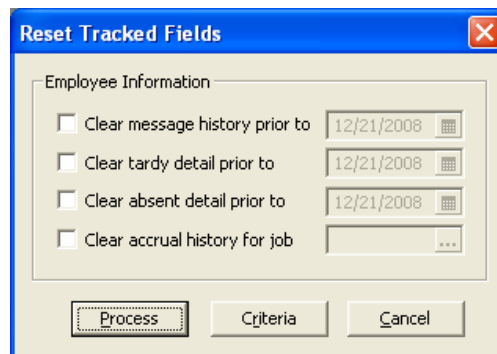
9.11. Tools for Maintaining TimeClock Plus System Health

9.11.1. Reset Tracked Fields

(TimeClock Manager Main Menu >Tools >Reset Tracked Info)

TimeClock Plus tracks several different items for each employee such as tardies, absences, messages, etc. In most instances, this information does not need to be kept forever and should be reset.

1. To reset a tracked field, from the TimeClock Manager Main Menu, select Tools, then “Reset Tracked Information”. The following screen will display.



Information in each of the fields displayed begins accumulating the moment an employee is added to the TimeClock system.

2. Select one or all of the fields on the screen to reset by clicking them to place a check in the box next to each. Three of the fields ask that you provide a prior to date. Only information prior to the provided date will be reset.
3. Filter the employees to include when resetting the tracked fields (e.g. by Job Code, Classification) by pressing the **Criteria** button on the bottom of the screen. Press **Save** to return to the reset screen.
4. To start the reset process, press the **Process** button (or the **Cancel** button to return to the previous menu without performing the reset).

9.11.2. Re-Indexing Data Files

(TimeClock Manager Main Menu > Tools > Re-index data files)

Indexes are used throughout the TimeClock system to provide quick and accurate access to data when a process is performed. From time to time these indexes may be out of order and negatively affect the performance of your system. Indexes can also be corrupted due to a loss of power or network problems during the use of the TimeClock system. A re-index of your data files should be performed if you believe that system performance is slowing or if database errors are occurring.

1. To perform a data file re-index, from the TimeClock Main Menu, select Tools then “Re-index data files”. The following screen will display.



2. Once the re-index is complete a screen will display designating the number of successful and failed index operations.

9.12. The Calculator and Calendar Tools

The TimeClock Manager includes a fully functional calculator similar to the Windows calculator. This function is accessed from the TimeClock Main Menu > Tools, then "Calculator" (or by pressing the toolbar icon resembling a calculator).



The calculator can display the amounts in Minutes as well as Hundredths. To change between the two, click on the button at the bottom of the calculator that says 'Change to Minutes' or 'Change to Hundredths'.

There is also a viewable calendar included with the application. This function is accessed from the TimeClock Manager Main Menu > Tools, then "Calendar" (or by pressing the toolbar icon resembling a calendar).

APPENDIX, SECTION IX

9.12.1. Standard Pay Period Reports Listing

Payroll Reports:

- Complete Payroll Report
- Day Breakdown Report
- Estimated Wages Report
- Individual Job Report
- Overtime Report
- Payroll Detail
- Payroll Summary
- Supplemental Pay Report
- Tracked Information Report
- Weekly Punch Report

Job Code Reports:

- Job Code Analysis (Detail)
- Job Code Analysis (Summary)
- Job Code Group Summary
- Job Code Split Report
- Selected Job Codes Report

Period Reports:

- Detail
- Summary

Scheduler:

- Absent Report
- Schedule Variance
- Schedule vs. Actual
- Schedule vs. Actual Breakdown
- Tardy Report

Accrual Reports:

- Accrual Usage Information
- Future Cost of Accruals
- Period Accrual Information

Miscellaneous:

- Anniversary Report
- Birthday Report
- Long Shift Report
- Scheduled Reviews

SECTION X: DAY-TO-DAY USE OF THE REMOTE DATA TERMINALS (RDTs)

This section provides instruction on the day-to-day use of a Remote Data Terminal (RDT). Using an RDT, employees can clock in/out via a remote TimeClock device rather than via a PC using the On-Screen TimeClock.

The purpose of an RDT is to collect punches and communicate those back to the TimeClock Plus application. They can also be configured to allow employees to perform timekeeping related functions such as view their hours worked, view their schedule, et cetera.

10. Basic RDT and Badge Diagnostics

10.1.1. Badge Test (For badge-reader equipped RDTs)

If your RDT is configured with a badge reader (barcode/magnetic/proximity), you can perform the following process to test badges and determine what is encoded on them.



*This test can only be performed if the option “Allow badge test with 00” is enabled for the RDTs port in WinRemote (on the **Terminal** tab). See Section 3.4.3 of this guide for more info.*

1. When the RDT is active and displaying the Main Menu, press the ‘0’ (zero) button twice.
2. Swipe a badge through the badge reader and its code will display on the RDT screen.
3. Press any RDT key to return to its Main Menu.
4. Repeat the swipe as needed, or press the RDT **ESC** key to end the badge test.

10.1.2. RDT Port Diagnostics

This process allows you to determine what port an RDT is connected to and how long it has been operating.



*This test can only be performed if the option ‘Allow ID terminal with 11’ is enabled for the RDTs port in WinRemote (on the **Terminal** tab). See Section 3.4.3 of this guide for more info.*

1. When the RDT is active and displaying the Main Menu, press the ‘1’ (one) button twice.
2. The RDT's port ID and uptime will display on the RDT screen.
3. Press any RDT key to return to the Main Menu.

10.1.3. WinRemote Activity Log

WinRemote keeps an Activity Log to let you view recent transactions on each RDT. The log includes a summary record for each successful transaction.

To **view** the activity log:

1. Launch WinRemote by going to the Windows Start menu, programs, TimeClock Plus 4.2, and clicking on WinRemote.
2. Select the RDT port you wish to view an Activity Log for, and click on it to highlight it.
3. Press the **Activity** button.
4. Press the **Clear** button if you want to clear the log.
5. Press **OK** to return to the WinRemote screen.

10.2. Day-to-Day Clock Operations at the RDT

This section provides instructions on clocking operations and is a useful tool for employees when just learning to use the TimeClock system.

10.2.1. Clocking In at the RDT:

1. Press the RDT's **Clock In** button.
2. Enter your employee identification (either by keying it from the keypad and pressing the **Enter** key, swiping your badge, or placing your finger/hand on the screen for recognition).
3. Check the screen to ensure your name appears and if prompted, press the **Yes** key to accept (or **No** to stop the clock in operation).
4. If you can clock in under multiple job codes, enter the job code for this shift and press the **Enter** key. If you do not know the job code, press the RDT's **⏏** (period) key to view a list of your available job codes.
5. If a Management Message displays, read it then press any key on the RDT to proceed.
6. If a Personal Message for you displays, read it then press the **Yes** key (or **No** key if you want the same message to appear next time you perform an operation at the RDT).
7. A brief message may display to tell you the clock operation has been successful (depending on how your system was set up).

10.2.2. Clocking Out at the RDT:

1. Press the RDT's **Clock Out** button.
2. Enter your employee identification (either by keying it from the keyboard and pressing the **Enter** key, swiping your badge, or placing your finger/hand on the screen for recognition).
3. Verify your employee ID if prompted.
4. If a message was sent, the message will appear at this point. You should press the **Yes/Enter** key to continue after you have read the message.

5. A brief message may display to tell you the clocking operation has been successful (depending on how your system was set up).

10.2.3. Clocking Out on Break from the RDT:

1. Press the RDT's **Break** button.
2. Enter your employee identification (either by keying it from the keyboard and pressing the **Enter** key, swiping your badge, or placing your finger/hand on the screen for recognition).
3. Verify your employee ID if prompted.
4. If the job code you were clocked in under requires you to enter a tracked field such as pieces or tips, enter that as prompted then press the **Enter** key.
5. If a message was sent, the message will appear at this point. You should press the **Yes/Enter** key to continue after you have read the message.
6. A brief message may display to tell you the clock operation has been successful (depending on how your system was set up).

10.2.4. Changing a Job Code from the RDT:

1. Press the RDT's **Job Code** button.
2. Enter your employee identification (either by keying it from the keyboard and pressing the **Enter** key, swiping your badge, or placing your finger/hand on the screen for recognition).
3. Verify your employee ID if prompted.
4. If the job code you were clocked in under requires you to enter a tracked field such as pieces or tips, enter that as prompted and then press the **Enter** key.
5. Enter the new job code and press the **Enter** key. If you do not know the job code, press the RDT's **.** (period) key to view a list of your available job codes.
6. If you use multiple cost codes, enter the cost code or press the **Clock In** and **Clock Out** keys to cycle through a list of cost codes available to you.
7. If a message was sent, the message will appear at this point. You should press the **Yes/Enter** key to continue after you have read the message.
8. A brief message may display to tell you the clocking operation has been successful (depending on how your system was set up).

10.2.5. Checking Hours Worked from the RDT:



In order for employees to be able to check their hours worked for the current shift and current week, this option must be enabled in Defaults for the TimeClock Manager (TimeClock Manager Main Menu > Configuration > Preferences > Defaults > TimeClock Client > Access tab).

1. Press the RDT's **Clock In** or **Clock Out** button.
2. Enter your employee identification (either by keying it from the keyboard and pressing the **Enter** key, swiping your badge, or placing your finger/hand on the screen for recognition).
3. When your name is displayed on the screen with the Yes/No confirmation, press the **0** (zero) key on the RDT keypad.

4. Once hours have been viewed, press the **No/Esc** key to return the RDT to its main screen.

10.2.6. Viewing Last Punch from the RDT:



In order for employees to be able to view their last punch from the RDT, this option must be enabled in Defaults for the TimeClock Manager (TimeClock Manager Main Menu > Configuration > Preferences > Defaults > TimeClock Client > Access tab).

1. Press the RDT's **Clock In** or **Clock Out** button.
2. Enter your employee identification (either by keying it from the keyboard and pressing the **Enter** key, swiping your badge, or placing your finger/hand on the screen for recognition).
3. When your name is displayed on the screen with the Yes/No confirmation, press the **8** (eight) key on the RDT keypad.
4. Once the last punch has been viewed, press the **No/Esc** key to return the RDT to its main screen.

10.2.7. Viewing a Schedule from the RDT:



In order for employees to be able to view their current schedule, this option must be enabled in Defaults for the TimeClock Manager (TimeClock Manager Main Menu > Configuration > Preferences > Defaults > TimeClock Client > Access tab).

1. Press the RDT's **Clock In** or **Clock Out** button.
2. Enter your employee identification (either by keying it from the keyboard and pressing the **Enter** key, swiping your badge, or placing your finger/hand on the screen for recognition).
3. When your name is displayed on the screen with the Yes/No confirmation, press the **.** (period) key on the RDT keypad.
4. When prompted, key in either 1 or 2 to view this week or next week's schedule.
5. Press the **Yes/Enter** key to cycle through the schedule or press the **No/Esc** key to return the RDT to its main screen.

10.2.8. Editing Hours from the RDT:

TimeClock Plus has the ability to allow users to edit employee hours from the RDT.



This option must be enabled from the TimeClock Defaults screen and the user who will be performing the edits must be added to the TimeClock User List and granted access to this feature.

10.2.8.1. To Add Clock In or Edit Clock Out:

1. Press the RDT's **6** (six) key.

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2. Press the RDT's **Clock In** or **Clock Out** key to select your user ID.
3. Enter your RDT password and press the **Enter** key.
4. Enter the Employee number you wish to add or edit a record for and press the **Enter** key.
5. Select Option 1.
6. Use the RDT's **⏏** (period) and Enter keys to scroll to the number you wish to change.
7. Press the **Enter** key.
8. Enter the Job Code and press **Enter**.
9. Press the **No/Esc** key to exit the Edit mode.

10.2.8.2. To Add Hours:

1. Press the RDT's **6** (six) key.
2. Press the RDT's **Clock In** or **Clock Out** key to select your user ID.
3. Enter your RDT password and press the **Enter** key.
4. Enter the Employee number you wish to add or edit a record for and press the **Enter** key.
5. Select Option 2, Add Hours.
6. Use the RDT's **⏏** (period) and Enter keys to scroll to the number you wish to change.
7. Press the **Enter** key.
8. Enter the Job Code and press **Enter**.
9. Press the **No/Esc** key to exit the Edit mode.

10.2.8.3. To Edit a Shift:

1. Press the RDT's **6** (six) key.
2. Press the RDT's **Clock In** or **Clock Out** key to select your user ID.
3. Enter your RDT password and press the **Enter** key.
4. Enter the Employee number you wish to add or edit a record for and press the **Enter** key.
5. Select Option 3, Edit Shift.
6. Use the RDT's **⏏** (period) and Enter keys to scroll to the number you wish to change.
7. Press the **Enter** key.
8. Enter the Job Code and press **Enter**.
9. Press the **No/Esc** key to exit the Edit mode.

SECTION XI: THE TIMECLOCK PLUS SCHEDULER

The TimeClock Scheduler is a powerful yet simple-to-use scheduling system that is fully integrated with the TimeClock Plus application. This integration is required to provide the real-time attendance monitoring features of the TimeClock application (tardies and absences) as well as the rounding-to-schedule and clock in restriction features.

The Scheduler was installed during the TimeClock installation process described in Section II of this guide. This section of the guide presents setup and use of all features of the TimeClock Scheduler including the setup and maintenance of employee

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schedules and shifts, producing schedule reports and importing and exporting of schedules.

11. TimeClock Scheduler

11.1. Basic Concepts of the Scheduler

1. All employees who have been set up in the TimeClock Manager are accessible to the Scheduler – there is no dual entry of employee data required.
2. Shift Pools can be created in the scheduler to simplify the scheduling process. These can be established for a single standard shift or multiple shift(s), depending on a company's needs. For example, all employees may be scheduled from 9:00 – 5:00 or this shift may only apply to administrative personnel while all other employees work one of three shifts during a 24-hour period.

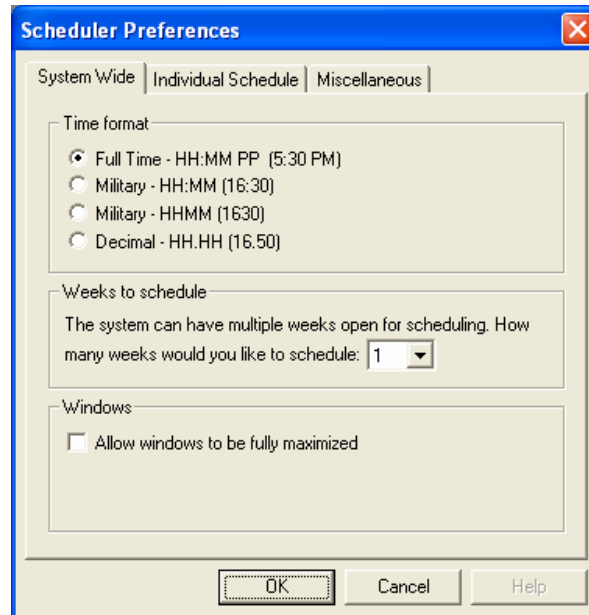


This is useful because once you have shift pools set up you can easily choose the shift to add to an employee rather than having to enter the shift times individually.

3. Necessary Shifts can be created and used to monitor whether they have been filled for a period.
4. The Scheduler includes the same Criteria feature utilized in TimeClock Manager to filter employee data for schedules, reports, etc.
5. As employees schedule vacation time this can be entered into the Scheduler then transferred to their time records automatically via the Transfer Job process. When you transfer job information it is just as if the employees clocked in and out via the TimeClock program.
6. The labor cost of scheduled hours can be automatically calculated via the Tools Menu of the Scheduler.
7. As a Close Week Process is performed in the TimeClock system, the schedule for the closed week is also closed.

11.2. Configuring the Scheduler (Defaults)

There are several Scheduler settings that are accessed via Preferences on the File menu (Scheduler Main Menu > File). To set these up, walk through each of the three tabs and determine which settings meet the needs of your organization.



11.2.1. The **System Wide** Tab

Time Format – you can specify the time format for the schedules and reports and how they will be displayed.

Full time – if enabled, the times will be shown in HH:MM PP, such as 4:30 PM.

Military – if enabled, the times will be shown as HH:MM, such as 16:30.

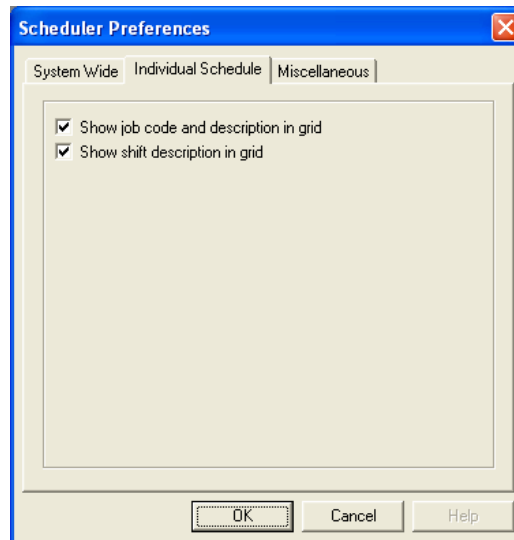
Military – if enabled, the times will be shown as HHMM, such as 1630.

Decimal – if enabled, the times will be shown as HH.HH, such as 16.50.

Weeks to schedule – the system allows you to have multiple schedule weeks open. Here you can designate how many weeks you wish to allow to be open at a time.

Windows - Allow windows to be fully maximized – if enabled, individual schedule windows can be fully maximized to your screen. If this option is checked, and the current window is maximized, all other windows opened will be automatically maximized.

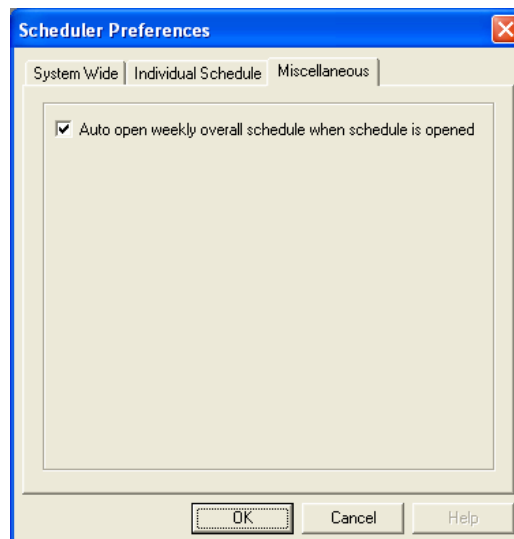
11.2.2. The **Individual Schedule** Tab



Show job code and description in grid – if enabled, both the job code and its description will display in the grid used to display an individual's schedule. If an employee only has one clockable job code this can be disabled so that only the time displays.

Show shift description in grid – if enabled, the description entered when setting up the schedule will display in the grid.

11.2.3. The **Miscellaneous** Tab



Auto Open the weekly overall schedule when a schedule is opened – if enabled, the Weekly Overall Schedule will be automatically opened when a schedule is opened.

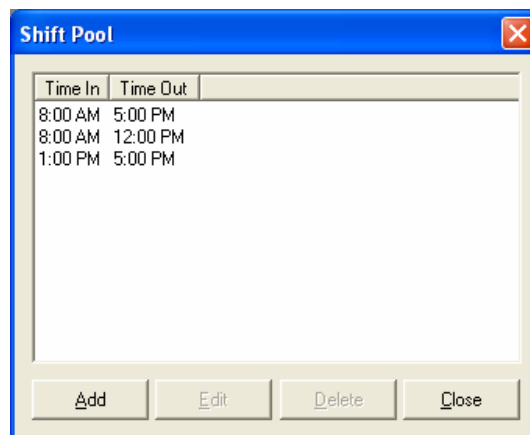
11.3. Establishing Shift Pools (Scheduler Main Menu >Tools >Edit Shift Pool)

If your business has one or more set shifts, a “shift pool” can be created for each for easy assignment to employees (by pressing the **Shift Pool** button on an employee’s schedule screen). Shift Pools can also be used to add special shifts such as **Off**, **On Call**, and **Open** that can be used as follows:

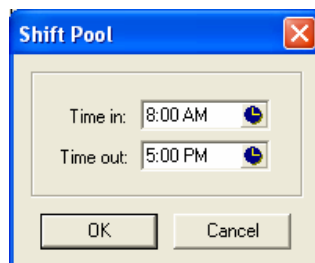
- ✓ **Off** and **On Call** shifts are used to inform an employee that they will be off or on call for the time period specified.
- ✓ An **Open** shift is used to designate a period of time that is open for the employee to clock in and out freely with no need for management approval if they are early or late. For example, if employees come to work on Saturdays at 6:00 a.m. and the manager does not arrive until 8:00 a.m., add an open area from 6:00 to 8:00 a.m. to allow the employees to clock in even if schedule restrictions say they cannot.

11.3.1. To create a Shift Pool:

1. Select the **Edit Shift Pool** option from the Tools Menu of the Scheduler. The Shift pool screen will display with any existing pools listed.



2. Click the **Add** button to display the Shift Pool input box.



3. Enter the start and end times for the new shift in the Time in and Time out fields.

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4. Click **OK** to accept your settings and save the shift (or **Cancel** to exit without saving).

11.3.2. To edit a Shift Pool:

1. Select the Edit Shift Pool option from the Tools Menu of the Scheduler.
2. Click on the shift pool you wish to edit from the Shift Pool list then press the **Edit** button (or double click the pool to access the edit screen). Make required changes to the start or end time and press **OK** to accept your changes and save the shift.

11.3.3. To delete a Shift Pool:

1. Select the Edit Shift Pool option from the Tools Menu of the Scheduler.
2. Click on the pool you wish to delete from the Shift Pool list and press the **Delete** button.



Deleting a Shift Pool will not affect any employee schedules that were previously established using the pool. It will no longer appear on Shift Pool lists.

3. Click the **Close** button to leave the Shift Pool function.

11.4. Designating Necessary Shifts

11.4.1. Creating Necessary Shifts by Manual Input

Necessary Shifts can be established to assist the manager in ensuring staffing during a specific period. If necessary shifts do not change from week-to-week, or change infrequently, the list can be used in building current and future schedules.

As necessary shifts are built users can see who is assigned to each shift and easily see if there are any necessary shifts that are not filled.

11.4.1.1. To create a Necessary Shift:

1. Select Edit Necessary Shift from the Tools Menu of the Scheduler. The Necessary Shifts screen will display.

Job code	Description	Time In	Time Out	Current Assignment
100		8:00 AM	5:00 PM	1-Mick Smythe
200		8:00 AM	5:00 PM	2-Joe Ramos
300		8:00 AM	5:00 PM	3-Willy Smith
300		8:00 AM	5:00 PM	4-Willy Hernandez
400		8:00 AM	5:00 PM	5-Franco Potts
400		8:00 AM	5:00 PM	6-Len Lamos
300		8:00 AM	5:00 PM	7-Joseph Kelly
400		8:00 AM	5:00 PM	8-Arnold Jacobson
300		8:00 AM	5:00 PM	9-Curt Lane
200		8:00 AM	5:00 PM	10-Carol Smith

2. Select the **Add** button and complete the four fields of the Add/Edit window that displays. Once the fields are completed, press **OK** to save the shift (or **Cancel** to return without saving the shift).
3. If any employees are currently assigned to the specified Job Code and Shift, their ID number and name will display in the "Current Assignment" column of the Necessary Shifts table. If no employees have been assigned to the shift record input, the column will display "Not assigned".

11.4.1.2. To edit a Necessary Shift:

1. Select **Edit Necessary Shift** from the Tools Menu of the Scheduler.
2. Click the shift you wish to edit from the Necessary Shift list then press the **Edit** button and complete the four fields of the Add/Edit window that displays.
3. Once the fields have been completed, press the **OK** button to save the shift (or **Cancel** to return without saving the shift).
4. If any employees are currently assigned to the edited shift record, their ID number and name will display in the "Current Assignment" column of the Necessary Shifts table. If no employees have been assigned to the shift record input, the column will display "Not assigned".

11.4.1.3. To copy a Necessary Shift(s) to another day:

1. Select **Edit Necessary Shift** from the Tools Menu of the Scheduler.
2. Click the shift you wish to copy from the Necessary Shift list then press the **Copy** button.
3. Next, click on the days in the week you wish to copy the Necessary Shift to and press **OK** to process and save the copy (or **Cancel** to return without saving the copied shifts).
4. If any employees are currently assigned to the copied shifts, their ID number and name will display in the "Current Assignment" column of the Necessary Shifts table on the appropriate day's tab. If no employees have been assigned to a shift record, the column will display "Not assigned".

11.4.2. Building Necessary Shifts Based on Current Schedule

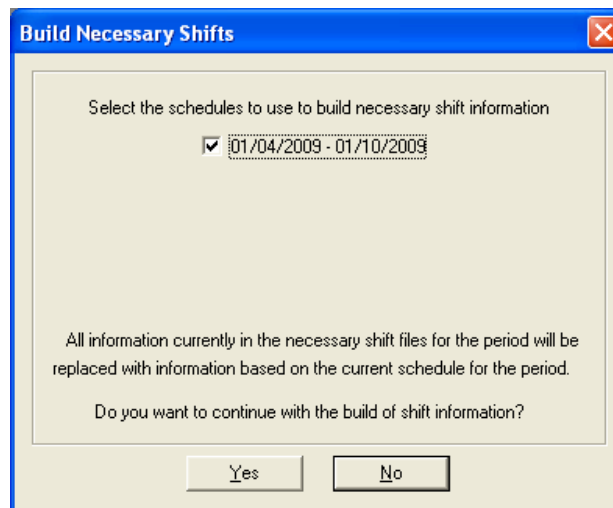
Necessary Shifts can be established automatically from the current schedule. This feature is useful if you are using the scheduling system for the first time and would like to enter the schedule manually then build necessary shifts for future use.



Building Necessary Shifts assigns all of your current employees' schedules as being Necessary Shifts.

11.4.2.1. To Build Necessary Shifts:

1. Select **Build Necessary Shifts** from the Tools Menu of the Scheduler. The Build Necessary Shifts screen will display.



2. Place a check mark next to each week you would like to build a necessary shift for based on the existing schedule. The number of weeks that will display in this list is based on the number you entered in the **Weeks to Schedule** option of Scheduler Preferences (refer to Section 11.2 for more information).
3. To perform the build of necessary shifts, press the **Yes** button (or **No** to cancel without performing the build).



All information in the necessary shifts file for the specified period will be replaced if this process is performed.

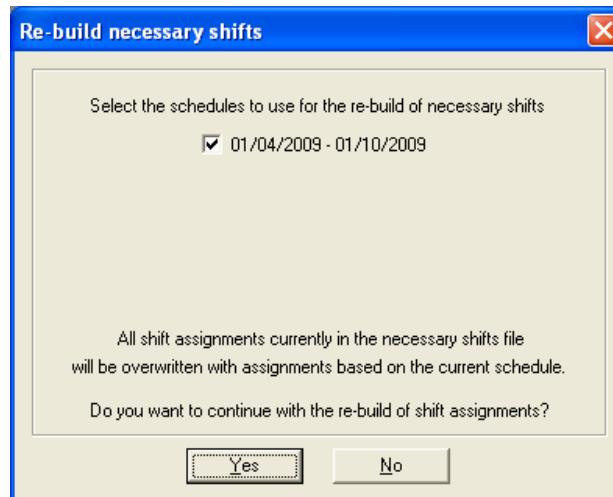
11.4.3. Re-Building Shift Assignments



Rebuilding Necessary Shifts cross references the Necessary Shifts that have been created and the employees' schedules, and those employees' schedules that match the Necessary Shifts are assigned to those Necessary Shifts.

11.4.3.1. To Re-build Necessary Shifts

1. Select Re-build shift assignments from the Tools Menu of the Scheduler. The **Re-build Necessary Shifts** screen will display.
2. Place a check mark next to each week you would like to re-build the shifts for. The number of weeks that will display in this list is based on the number you entered in the Weeks to Schedule option of Scheduler Preferences (refer to Section 11.2 for more information).
3. To perform the Re-build of Necessary Shifts, press the **Yes** button (or **No** to cancel without performing the Re-build).



11.4.4. Designating Employee Availability (Scheduler Main Menu >Tools >Edit Employee Availability)

This function of the Scheduler is used to designate certain days and times in the system that an employee is not available to work. This assists during scheduling because an unavailable message will display on the screen if you attempt to schedule an employee during an unavailable time. There are two types of employee availability settings:

1. Fixed – fixed settings are used to designate which days of every week, Sunday through Saturday, an employee is not available. If an employee cannot work on Sundays you would block the entire day of Sunday.
2. Period – period settings are used to designate availability on a specific date. If an employee cannot work September 5, 2002 because of a prior commitment, you would block the entire day of September 5, 2002.



In determining if an employee is available to work on a particular day the system will first check their “fixed” availability, then their “period” availability.

11.4.4.1. To designate availability for an employee:

1. Select the **Edit Employee Availability** option from the Tools Menu of the Scheduler. The Availability Screen will display with all employees listed down the left hand side.

Number	First	Last
1	Mick	Smythe
2	Joe	Ramos
3	Willy	Smith
4	Willy	Hernandez
5	Franco	Potts
6	Len	Lamos
7	Joseph	Kelly
8	Arnold	Jacobson
9	Curt	Lane
10	Carol	Smith
11	Tom	Jacobs
12	George	Kelly
13	Jack	Kyne

	12 am	1 am	2 am	3 am	4 am	5 am	6 am	7 am	8 am	9 am	10 am	11 am	12 pm	1 pm	2 pm	3 pm	4 pm	5 pm	6 pm	7 pm	8 pm	9 pm	10 pm	11 pm
Sunday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Monday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Tuesday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Wednesday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Thursday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Friday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable
Saturday	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable	Unavailable

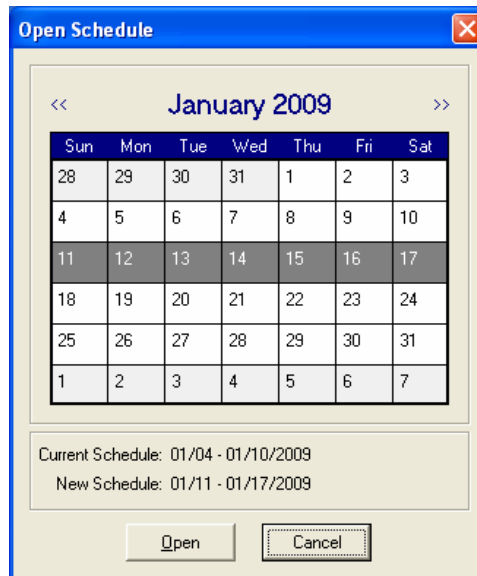
2. Select the employee from the list by clicking on them. Their current fixed availability (weekly) will display on the right hand side of the screen.
3. Click on the **Edit Fixed** button to edit their availability for a day of the week. Using the mouse, click and drag in the grid to enter times that the employee should not be scheduled for this day.
4. Click on the **Period** button to edit their availability for a specific date. Select the date of their unavailability and use the mouse to click and drag to enter times of unavailability.
5. To save your input, press the **Close** button. To exit without saving your input, press the Windows close button **X** on the top right hand side of the Availability screen.

11.5. Opening/Creating a Work Schedule

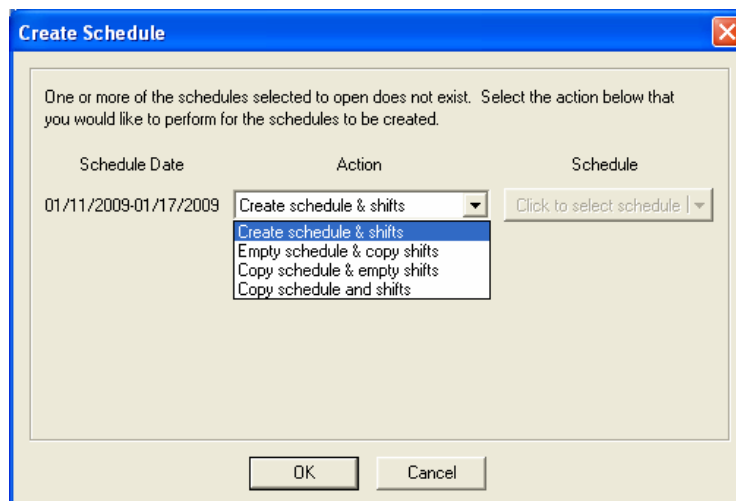
Before individual employee schedules can be created for a week, a schedule for that week must be “opened”. The open process provides a flexible way to create a schedule based on previous weeks, shift assignments, etc.

11.5.1. To Open or Create a Schedule:

1. From the Scheduler Main Menu, select File then Open Schedule. The **Open Schedule** Screen with calendar will display.



2. Use the << and >> buttons to the left and right of the month name to page forward and backward through the months.
3. To select a week, click on any day of that week. The New Schedule line will update to reflect the week selected for scheduling. Press the **Open** button to proceed.
4. If a schedule does not currently exist for the selected week the **Create Schedule** screen will display (if a schedule for the week already exists, it will be opened for editing purposes).



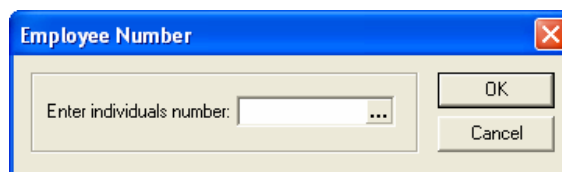
5. On the **Create Schedule** screen designate how to create the schedule by selecting one of the following from the drop down box under Action:
 - Create schedule & shifts – a blank schedule and necessary shifts will be created for the week.
 - Empty schedule & copy shifts – a blank schedule will be created and the necessary shifts from the date specified in the Schedule drop down box will be copied to the new week.
 - Copy schedule & empty shifts – the schedule from the date specified in the Schedule drop down box will be copied to the new week and the necessary shifts will be emptied.
 - Copy schedule & shifts – the schedule and necessary shifts will be copied to the new week from the date specified in the Schedule drop down box.
6. Click on the **OK** button to create the schedule based on the settings (or **Cancel** to exit the schedule creation process without performing any processing).

11.6. Creating/Editing Employee Schedules

Creating and/or editing an employee schedule is performed from the View Menu of the Scheduler Main Menu. There are three methods for creating schedules, all found on the View Menu - Employee Schedule, Weekly Overall Schedule or Daily Overall Schedule, as follows:

11.6.1. Creating Schedules via the Employee Schedule Function

1. Begin by selecting Employee Schedule from the View Menu. The Employee Number box will display.

A screenshot of a dialog box titled "Employee Number" with a blue header bar and a red close button in the top right corner. The dialog contains a text input field with the placeholder text "Enter individuals number:" followed by a small button with three dots "...". To the right of the input field are two buttons: "OK" and "Cancel".

2. Enter the employee's ID number in the Enter individual's number field (or select it from the drop down menu which displays if you press the ... button on the field).

The individual employee's schedule screen will display with the following data sections:

- The middle section of the screen displays the employee's current schedule in a two-dimensional matrix format (days of the week across the top and schedule segments down the left hand side).

- The lower left corner of the screen displays summary information about the week regarding regular and overtime hours scheduled.
- The lower right corner of the screen displays any Schedule Requests made by the employee.

	Sun 01/11	Mon 01/12	Tue 01/13	Wed 01/14	Thu 01/15	Fri 01/16	Sat 01/17
Hours:	0:00	9:00	9:00	9:00	9:00	9:00	0:00
1		08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							

Week hours					Requests	
Week	Regular	Overtime #1	Overtime #2	Total	Date	Request
1	40:00	5:00	0:00	45:00		

Shifts can be added to an employee's individual schedule in several ways, including:

- Manually entering all information by shift/day
- Copy all info from another day or week
- Copy all info from a schedule template
- Copy all info from a previous schedule

11.6.2. To manually enter a schedule for a shift or day

1. Double click on the first empty cell under the required day of the week (in the schedule portion of the screen). You can either enter the data via a Shift Pool (press the **Shift Pool** button and select the pool you wish to assign) or enter the shift in manually.
2. In the **Edit Shift Window** complete the Start Time, End Time and Job Code fields (the description is optional) and enable any of the Segment Flags that apply to this shift, as follows:
 - On break/lunch after this segment – if enabled, this segment will be tied to the next segment in the schedule with a break. This will cause multiple segments to be treated as one shift. When determining absent and tardy the system will look at shifts and not segments. For example, suppose you scheduled 9:00 a.m. – 11:00 a.m. and 12:00 p.m. – 5:00 p.m. To tie these two shifts together as if a break were taken you would check this box in the 9:00 – 11:00 a.m. shift.

- Force Overtime #1/Overtime #2 after this segment – If enabled, overtime #1 or #2 will be forced on this segment. This is only used for labor costing purposes in Scheduler and will not automatically be recorded as forced to overtime when an employee clocks in for this shift, unless the job code used forces overtime.
 - Disable auto deductions for this shift – if enabled, automatic break deductions for this shift will be disabled. This is only used for labor costing purposes in Scheduler and will not automatically be entered in the shift when the employee clocks in.
3. Press the **OK** button to save the shift and return to the employee's schedule screen.



*You can view and assign Necessary Shifts while setting up an employee shift. To view/assign an employee to a Necessary Shift, press the **Shifts** button on the employees shift window. To assign a necessary shift to the employee, click on it to select it from the Necessary Shifts List displayed.*

11.6.3. To copy one day's schedule to another:

1. Select the day you will copy the schedule from by clicking on it once.
2. Press the **Copy** button on the employee's schedule screen and select Copy Day (this places the schedule data on the clipboard).
3. Select the cell of the employee's schedule where you wish to copy the selected information to. Press the **Copy** button again, and then select Paste Day to paste the selected day to the next cell.

11.6.4. To paste from a previous schedule:

1. With the employee's schedule screen displayed, press the **Copy** button from the box's toolbar and select the Paste a Previous Schedule option.
2. Select the week you wish to paste the schedule from and press the **OK** button to complete the paste process.

11.6.5. Using a Schedule Template:

Templates of employee schedules can be saved and used for quick entry of required shifts during the scheduling process. Templates are created and accessed for use via the **Copy** button on the Employee Schedule screen.

11.6.5.1. To copy an existing schedule to a template:

1. Once you have created a schedule you wish to save, press the **Copy** button and select the Copy Schedule to Template option.
2. Enter a name in the Template Name field and press **Save**. It can now be used in the future for any schedule or employee.

11.6.5.2. To copy from an existing template:

1. Press the **Copy** button and select the Paste Template to Schedule option.

11.6.5.3. To delete an existing schedule template:

1. Press the **Copy** button and select the Delete Schedule Templates option.
2. Select the template you wish to delete from the displayed list and press **OK** to delete it (or **Cancel** to halt the deletion process).

The **Detail** Button on the individual schedule screen displays a screen with all details about the employees schedule including shifts and cumulative regular and overtime hours.



To ensure that multiple segments are treated as a single shift, they must be attached with breaks.

11.6.6. Creating Schedules via the Weekly Overall Schedule

The Weekly Overall Schedule option presents the week's schedule, by employee, with shift detail for each day. The leftmost column of this window contains the list of employees that are currently scheduled. Each column holds a day's schedule for each employee.

Weekly Overall Schedule - January 4, 2009 to January 10, 2009							
	Sun 01/04	Mon 01/05	Tue 01/06	Wed 01/07	Thu 01/08	Fri 01/09	Sat 01/10
Mick Smythe #1		08:00 AM-05:00 PM 100-Administrative	08:00 AM-05:00 PM 100-Administrative	08:00 AM-05:00 PM 100-Administrative	08:00 AM-05:00 PM 100-Administrative	08:00 AM-05:00 PM 100-Administrative	
Joe Ramos #2		08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	
Willy Smith #3		08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	
Willy Hernandez #4		08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	
Franco Potts #5		08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	
Len Lamos #6		08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	
Joseph Kelly #7		08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	
Arnold Jacobson #8		08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	08:00 AM-05:00 PM 400-Assembly II	
Curt Lane #9		08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	08:00 AM-05:00 PM 300-Assembly I	
Carol Smith #10		08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	08:00 AM-05:00 PM 200-Engineering	

1. To add a schedule for an employee while in Weekly Overall Schedule, double click on the cell containing the day's schedule for that employee. The Individual Schedule window will display for that employee and edits can be made as described in the section above.

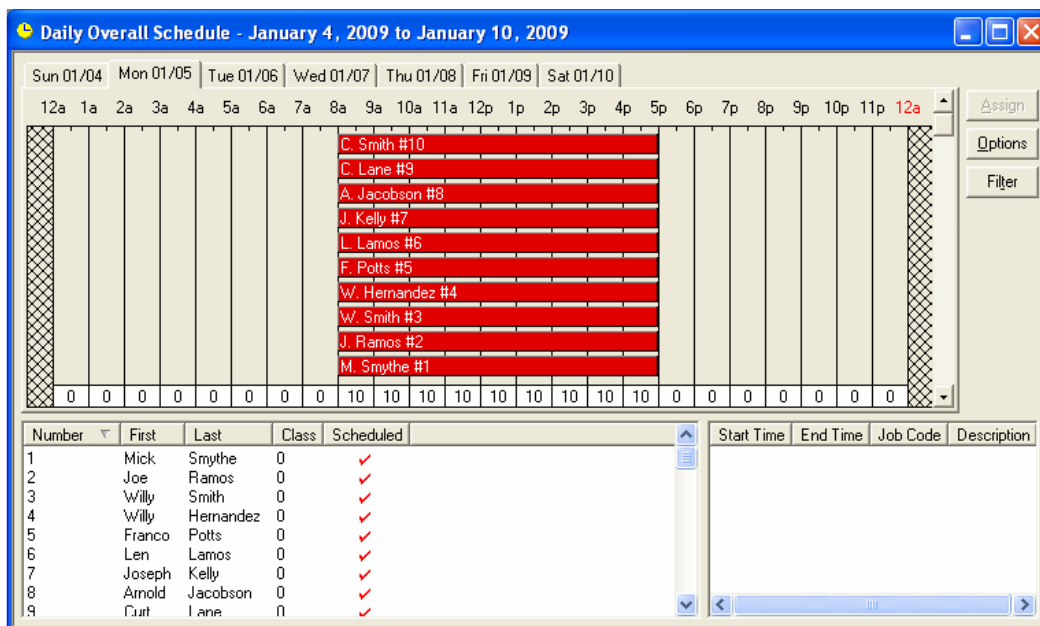
11.6.6.1. Weekly Overall Schedule Options

The **Options** Button is used to configure how information is displayed in the Weekly Overall Schedule display.

- **Individual Sort Order** – select the method you wish the system to use when sorting employees for display in the Weekly Overall Schedule.
- **Display Options:**
 - Show individuals number in the list** – if enabled, the Employee ID number will display next to each employee's name.
 - Show individuals classification in the list** – if enabled, the employee's classification code will display.
- **Name Format** – select how you want employee names to display in the schedule.

11.6.7. Create Schedules via the **Daily Overall Schedule** using Necessary Shifts

The **Daily Overall Schedule** provides a visual representation (graph form) of daily shift assignments (each tab provides a schedule for each weekday).

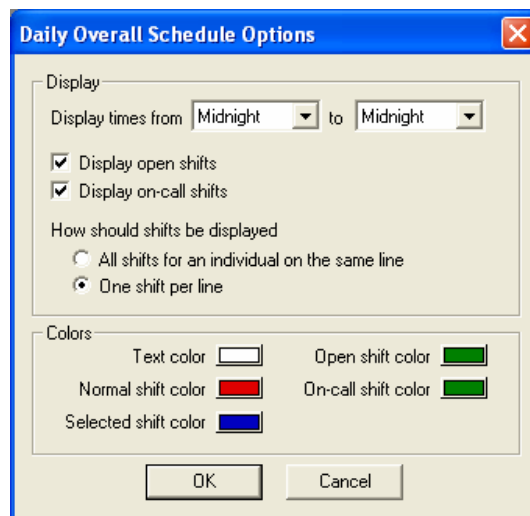


There are three sections to the **Daily Overall Schedule** screen. The upper section contains a grid representing the shifts scheduled (by day, per tab selected). The lower left section of the screen contains a list of employees and the lower right contains a list of necessary shifts that are available on the day selected (by tab).

11.6.7.1. To assign a necessary shift to an employee:

1. Select the day you want to schedule from the tabs at the top of the window.
2. Select the employee to schedule from the list at the lower left by clicking on the employee to highlight them.
3. Assign a necessary shift to this employee (on the selected day) by double clicking on the necessary shift (or single clicking the shift and pressing the **Assign** button).

The **Options** button on the Daily Overall Schedule controls display options for viewing schedules of employees.



Display times from/to: – this option allows you to display a particular time period for schedule viewing. For example, if your business is only open from 7:00 a.m. to 7:00 p.m. you may not want to display information before or after these times.

Display open shifts – if enabled, open shifts will be displayed in the graph.

Display on-call shifts – if enabled, on-call shifts will be displayed in the graph.

How should shifts be displayed:

All shifts for an individual on the same line – if enabled, all shifts for a single employee will display on one line of the graph.

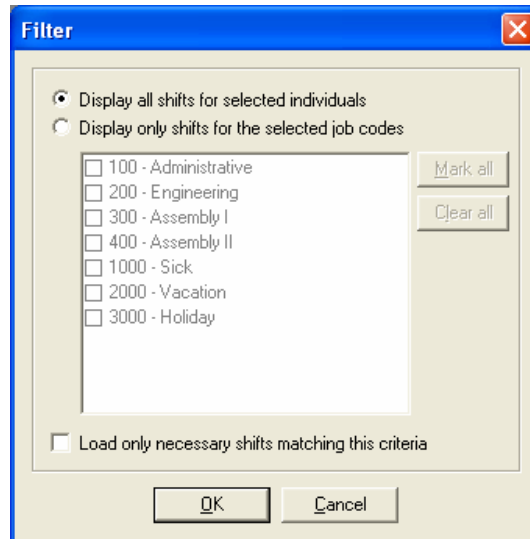
One shift per line – if enabled, all shifts for a single employee will display by staggered and on multiple lines of the graph.

Colors:

Each type of shift can display in a different color. To change the color of a specific type of shift, click on the box next to the item and select a new color from the dialog displayed.

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The **Filter** button allows you to control which shifts are displayed in the grid.



1. To display all shifts that are scheduled, enable Display all shifts for selected individuals.
2. To display only the shifts associated with selected job codes, enable Display only shifts for the selected job codes and mark those codes you wish to include by clicking them in the display list.
3. To select or deselect all codes, use the Mark all or Clear all buttons.



To only display necessary shifts, place a check in the box next to Load only necessary shifts matching this criteria.

11.6.8. Importing an Employee's Schedule (Scheduler Main Menu >File >Import Schedule Data)

The process for importing employee schedules from another system or file is identical to that used in the TimeClock Manager (during the set up of employees, job codes, et cetera). Please review Section VI for detailed instructions on performing imports.

The schedule import process is accessed from the Scheduler Main Menu > File > Import Schedule Data. The following 15 fields are available during this mapping process so your source file can include any or all of these fields:

Employee ID Number	Shift Hours (in minutes)
Job Code	Flag Force Overtime 1
Date In	Flag Force Overtime 2
Time In	Flag Disable Auto Deduct
Date Out	Day Offset (0-schedule period)

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Time Out	Shift Flag (Off, On Call, Open)
Shift Hours (in hundreds)	Shift Description
On Break Flag	

11.7. Day-to-Day Management of Employee Schedules

This section provides information on other features provided by the Scheduler, including transferring scheduled vacation time (or other job codes) to the TimeClock Manager, receiving and viewing employee schedule requests, reporting, and exporting schedules.

11.7.1. Transferring Job Information from Scheduler to Time Records (Scheduler Main Menu > Tools > Transfer Job Information)

The Transfer Job Information function is used to copy scheduled hours directly to an employee's time records in the TimeClock Manager database. This function is mainly used to transfer scheduled vacation hours to hours worked but it can be used to transfer any job code.



When you transfer job information it is just as if the employee clocked in and out in the TimeClock program.

11.7.1.1. To transfer job information:

1. Select Transfer Job Information from the Tools Menu. The **Transfer Job Information** screen will display.

2. From the list at the left select each job code you would like to transfer from the schedule to actual time records by clicking on it. Multiple job codes can be selected by holding down your computer CTRL key as they are clicked.
3. Enter the date range to transfer in the Transfer Dates section of the screen.



Data for any period can be transferred from Scheduler to TimeClock Manager as long as the data is after the start of the current TimeClock week (the date displayed in the status bar in TimeClock Manager). The transfer does not care what week is open in Scheduler. You will receive an error message if any portion of the date range is before the current week in the TimeClock Manager.

4. Click on the **Criteria** button to select what employees to transfer schedule data for.
5. Click on the **Preview** button to review the transfer you have defined.
6. Click on the **Process** button to perform the transfer, or **Cancel** to close the process without performing the transfer.

11.7.2. Employee Schedule Requests

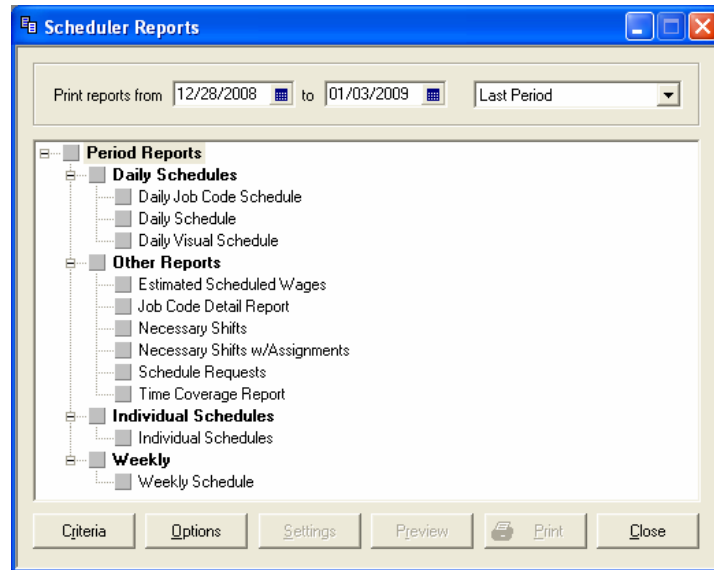
TimeClock provides a method for employees to request schedule changes either from the On-Screen TimeClock (if this ability is enabled during its configuration) or via the Scheduler (see Section 11.7.2 of this User Guide for more information on the input of schedule request). These requests are maintained and presented for viewing in the Scheduler application by selecting Edit Employee Schedule Requests from the Tools Menu.

From this function schedule change requests can be Added, Edited or Removed. The display can be filtered by employee, day or week by pressing the **View** button.

Schedule Requests can also be printed in hard copy by printing the Schedule Request Report.

11.7.3. Scheduler Reporting (Scheduler Main Menu > Reports)

There are several standard schedule-related reports provided with the system. Most are customizable, including the ability to change the report title and include/exclude non-essential data. In addition, the **Criteria** Button is available when running reports to provide the selection/filtering of employees to be included in the report.



Scheduler Reports are categorized into several different sections, as follows:

- ✓ Daily Schedules
 - Daily Job Code Schedule
 - Daily Schedule
 - Daily Visual Schedule
- ✓ Other Reports
 - Estimated Scheduled Wages
 - Job Code Detail Report
 - Necessary Shifts
 - Necessary Shifts with Assignments
 - Schedule Requests
 - Time Coverage Report
- ✓ Individual Schedules
 - Individual Schedules
- ✓ Weekly Schedules
 - Weekly Schedules

For more information on printing reports see Section 9.4 of this User Guide.



*Press the **Criteria** button to designate which employee(s) to include in a report.*

11.7.4. Exporting Schedules (Scheduler Main Menu > File > Export Schedule Data)

Schedules can be exported from the Scheduler for use in other applications. The Export Schedule Data process produces a file containing fields of data for each employee

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record. This export can be produced in an ASCII text file or comma delimited format. Layouts for the standard schedule export file are as follows:

Employee ID Number	Time Out
Export Code	Shift Hours (hundredths)
Full Name	Rate of Pay
First Name	On Break Flag
Last Name	Shift Hours (minutes)
SSN	Flag Force OT1
Classification	Flag Force OT2
Job Code	Flag Disable Auto Deduct
Job Code (Export As)	Break Length
Date In	Day Offset (0-Schedule Period)
Time In	Shift Flag (Off, On Call, Open)
Date Out	Shift Description

For more information on the exporting process see Section 9.5 of this User Guide.

11.8. Other Features and Functions of the Scheduler

11.8.1. Calculating Labor Cost based on Schedules (Scheduler Main Menu >Tools >Calculate Scheduled Labor Cost)

This function provides an hour-by-hour breakdown of labor costs, for a specified period, based on schedules within the system and hourly rates for employees. It allows you to enter estimated sales on an hourly or weekly basis to generate an estimated labor cost percentage as well.

Estimated Schedule Labor Cost

Labor cost for the period of 01/04/2009 to 01/10/2009

Hours scheduled:	450.00	Estimated wages:	\$2,218.73	<input type="radio"/> View daily figures
Total sales:	\$4,000.00	Salary wages:	N/A	<input checked="" type="radio"/> View weekly figures
Labor percentage:	55.47%	Total wages:	\$2,218.73	

Time	Hours	Wages	Sales	Labor%	Time	Hours	Wages	Sales	Labor%
12am	0.00	0.00	0.00	N/A	12pm	50.00	256.91	200.00	128.45
1am	0.00	0.00	0.00	N/A	1pm	50.00	256.91	200.00	128.45
2am	0.00	0.00	0.00	N/A	2pm	50.00	256.91	300.00	85.64
3am	0.00	0.00	0.00	N/A	3pm	50.00	256.91	600.00	42.82
4am	0.00	0.00	0.00	N/A	4pm	50.00	256.91	600.00	42.82
5am	0.00	0.00	0.00	N/A	5pm	0.00	0.00	400.00	0.00
6am	0.00	0.00	0.00	N/A	6pm	0.00	0.00	0.00	N/A
7am	0.00	0.00	0.00	N/A	7pm	0.00	0.00	0.00	N/A
8am	50.00	233.55	400.00	58.39	8pm	0.00	0.00	0.00	N/A
9am	50.00	233.55	500.00	46.71	9pm	0.00	0.00	0.00	N/A
10am	50.00	233.55	600.00	38.93	10pm	0.00	0.00	0.00	N/A
11am	50.00	233.55	200.00	116.78	11pm	0.00	0.00	0.00	N/A

Update Options Print Period << >>

For more information on the Labor Cost function, see Section 9.8 of this user guide.

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11.8.2. Deleting Past Schedules

(Scheduler Main Menu > Tools > Delete Past Schedules)

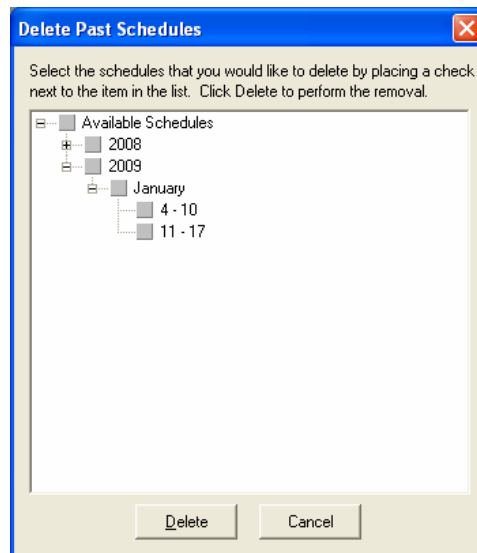
This function is provided to enable the user to delete any schedules that are no longer needed. Schedules should only be deleted if they are no longer necessary for absent/tardy monitoring, managing employees to schedule and/or reporting purposes.



Schedules that are not currently open will not be displayed on the Delete Past Schedules screen.

11.8.2.1. To delete schedules from the system:

1. Select the Delete Past Schedules option from the Tools Menu. The following screen will display.



2. Select the schedule(s) you wish to delete by placing a check mark in the box to the left. Multiple schedules can be selected.
3. Press the **Delete** button to perform the deletion (or **Cancel** to exit without performing the deletion).



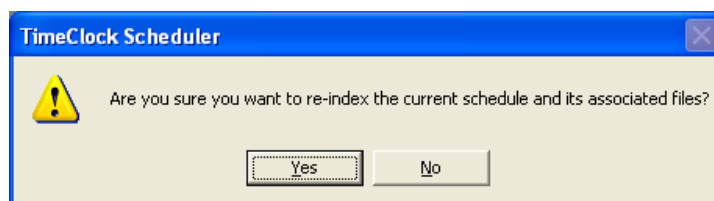
By selecting a parent item (with a minus sign in the box to its left), all schedules underneath it will be selected.

11.8.3. Re-Indexing Data Files

(Scheduler Main Menu > Tools > Re-index data files)

Indexes are used throughout the TimeClock system to provide quick and accurate access to data when any processes are performed. From time to time these indexes may be out of order and negatively affect the performance of your system. Indexes can also be corrupted due to a loss of power or network problems during the use of the TimeClock system. A Re-index of your data files should be performed if you believe that system performance is slowing or if database errors are occurring.

1. To perform a data file re-index, from the Scheduler Main Menu, select Tools then Re-index data files. The following screen will display.



2. Note that all data files are checked to be included in the re-indexing and this is recommended. You can select only specific data files by de-selecting those you do not wish to re-index.
3. Press the **Process** button to perform the re-index.
4. Once the re-index is complete, press the **Cancel** button to return to the main menu.

11.8.4. Optimizing Data Files

(Scheduler Main Menu >Tools >Optimize Data Files)

When information is "deleted" from database files it is not really deleted. It is marked so as to be ignored by future operations. This approach is taken for efficiency and speed when using the system. On systems with a lot of activity, the database files can become very large, resulting in a slowdown for the TimeClock system. To actually delete the data, you must optimize the data files. During the optimization process, all databases are searched and data previously marked for deletion is purged from the system.

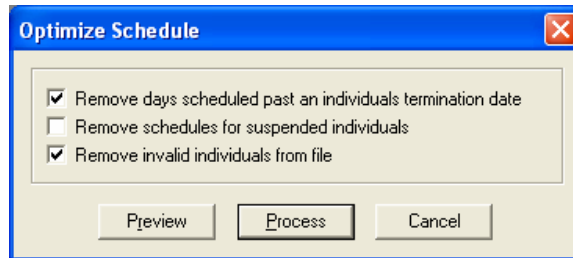


Only perform the Optimize Data Files process when TimeClock use is at a minimum.



It is highly recommended that you perform a backup of your system before the optimization process.

1. To optimize your data files, from the Scheduler Main Menu, select Tools then Optimize Data Files. The following Optimize Schedule screen will display.



2. Enable any or all of the three options on the Optimize Schedule screen based on your operations.
3. Press the **Process** button to perform the optimization (or **Preview** to review your settings, or **Cancel** to exit without performing the optimization).

SECTION XIV: AUTOUPDATE OF THE TIMECLOCK PLUS APPLICATIONS

The AutoUpdate Module is used to periodically update your TimeClock Plus applications via the Internet. These updates are made available to all valid licensees of the TimeClock Plus applications at no cost and often contain enhancements to the system. This is also where fixes are made available. It is recommended that you run AutoUpdate once every few weeks to check for possible updates and download/install them if any are available.

12. AutoUpdate

12.1. The AutoUpdate Process

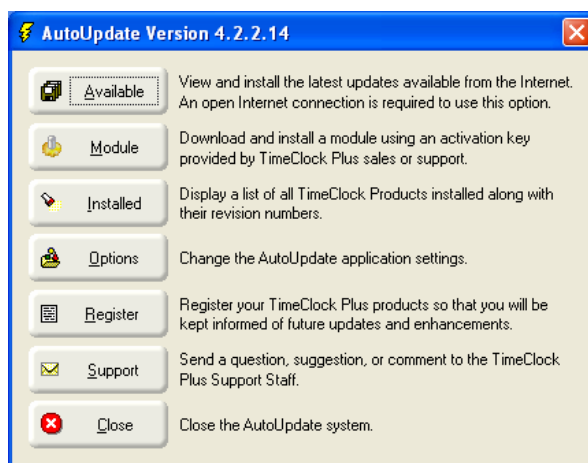
(TimeClock Manager Main Menu >Launch >AutoUpdate)



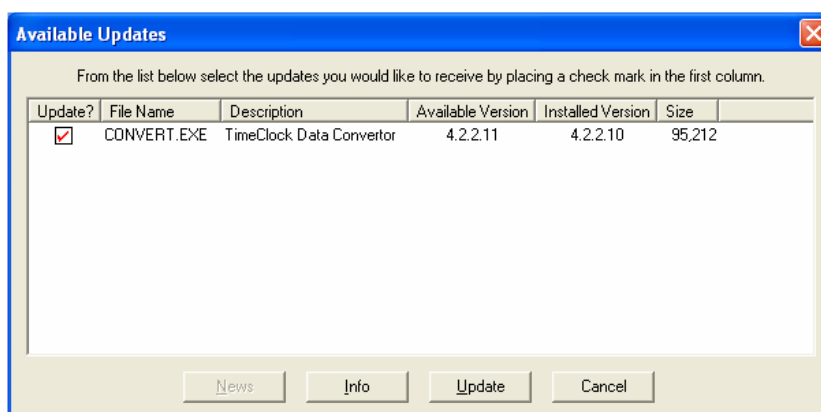
You *must* close all TimeClock Plus applications (including the On-Screen TimeClock and the TimeClock Manager) before attempting to perform an AutoUpdate. This includes any applications that may be running on your network.

12.1.1. To AutoUpdate Directly from the Internet:

1. To begin the AutoUpdate process it must be launched via the Windows Start process or it can also be launched from the TimeClock Manager via the Launch Menu; however, because all TimeClock applications must be closed you will have to close the TimeClock Manager when prompted. The **AutoUpdate** screen will display, including your current version number.



2. On the AutoUpdate window press the **Available** button. The **Available Updates** screen will display, only containing those items that require update at this time (based on the versions you have currently installed).



3. To view News or Info about an available update, click on the update in the list to highlight it and press the **News** and/or **Info** buttons.
4. To begin the update process, select or deselect the individual updates you wish to install from the available updates list then press the **Update** button (or the **Cancel** button if you wish to exit the AutoUpdate process without applying any changes).
5. When the update is complete the system will provide you a list of which updates were installed successfully.
6. To exit AutoUpdate, press the **Close** button.

12.2. Other Options Available via AutoUpdate:

12.2.1. The **Module** Button

Optional modules can be purchased from TimeClock Plus and downloaded via the AutoUpdate system. Press the **Module** button and the **Module Download** screen will display. Enter the Module Activation key provided to you by TimeClock Plus and click the

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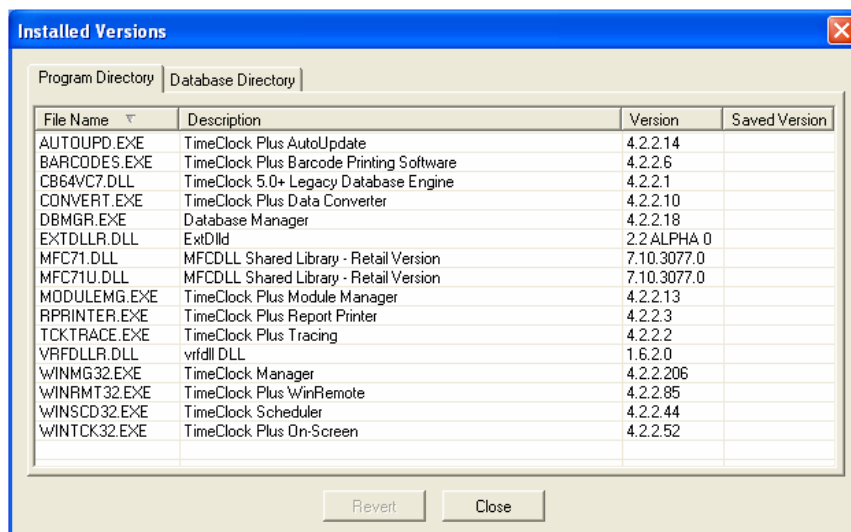
OK button to download the module. Once the module is downloaded, you must enable it through Module Manager.



You must have a connection to the internet to download the module.

12.2.2. The **Installed** Button

If pressed, the system will display a list of all TimeClock Plus products installed along with their version/revision numbers. From this screen you can revert to a previously installed version of an application or module if one is installed. To do so, select it from the list by clicking on it then press the **Revert** button on the bottom of the screen.



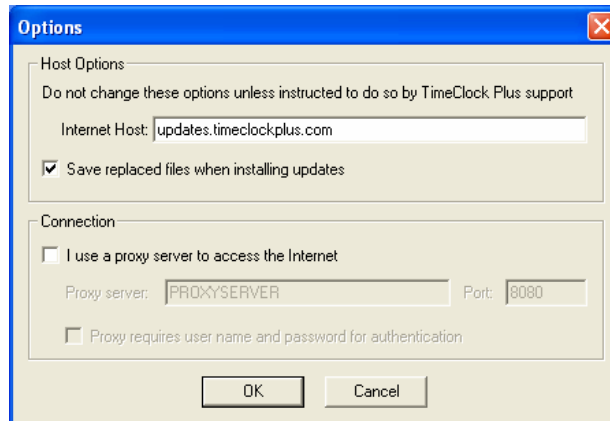
To be able to Revert to a previous version you must have the Save replaced files when installing updates option enabled on the Options screen (see next section of this guide)

12.2.3. The **Options** Button

If pressed, the **Options** screen will display for changing Host Options and Transfer Timeouts.



It is not recommended that these options be changed unless you are instructed to do so by a member of the TimeClock Plus Technical Support Team.



Internet Host – this is the website where the TimeClock updates are located.

Save replaced files when installing updates – if enabled, the files being replaced will remain on your system. This option must be enabled if you want to option to revert to previous versions after installed updates.

Press **OK** to save your AutoUpdate options.

12.2.4. The **Register** Button

This option can be used to register your TimeClock Plus system after installation. It is recommended that you register so we can keep you informed of future versions and enhancements.

12.2.5. The **Support** Button

The Support option is used to send a question, comment, or suggestion to the DMI Technical Support Team (or you can send them via regular email to support@timeclockplus.com).

When you click on the Support button, you will be presented with two options:

Open the TimeClock web site to submit a support question – if enabled, when you click OK, your default web browser will open and you will be directed to the TimeClock Plus web site to send an email to TimeClock Plus Technical Support.

Create a company backup to send to TimeClock Plus support – if enabled, when you click Ok, you will be able to create a backup of your system to submit to TimeClock Plus Technical Support.



Submitting a backup through the Support Button requires a submission ID given by a TimeClock Plus Support Technician.

12.2.5.1. To create a backup to send to Support via AutoUpdate:

1. Launch TimeClock Manager, and from the TimeClock Manager Main Menu select Tools, then "Backup System Information". The **Backup System Information** screen will display.
2. For the Server Directory, enter the directory on the server (machine hosting the TimeClock Database) that you would like the backup to be created. If you enter C:\TCBackup, then the backup will be created and placed on the server, in the C:\TCBackup directory.



The directory specified is on the server (the machine hosting the TimeClock Database), not the local machine. So if you enter C:\TCBackup, it is referring to the C:\TCBackup directory on the server, not locally on the machine performing the backup procedure.

3. For the File name, enter the name that you would like the backup file to be named.
4. Click on the **Start Backup** button to begin the creation of the backup.

You can then submit the backup by two different ways:

Submit Automatically:

1. On the Submit dialog box, click the Next button.
2. At the Transfer dialog box, you will be prompted to enter the Submission ID given by the TimeClock Plus Support Technician.
3. Add any additional comments in the comments section that you feel might be beneficial to the Technician.
4. To submit the backup, click the Finish button.

Submit Manually:

1. On the Submit dialog box, click the Submit Manually button.
2. You will then be prompted to save the backup to a location.
3. Once the file has been saved in a location (i.e. Desktop). You then should email the backup to support through your normal email account.

Please note that the Support Team cannot respond to e-mail requests by telephone. If you submit a question via e-mail, be sure and include a valid e-mail address so the Support Team can respond via e-mail.