



Timekeeping User Manual

Timekeeping User's Manual Table of Contents

Congratulations on your choice to save time and money with automated timekeeping! The content provided in the Timekeeping User Manual is listed in the same order in which it appears in the Main Menu of the online timekeeping system. This will allow you to find information easily in both the system and the user manual.

The Timekeeping User Manual shares step-by-step instructions on how to complete various tasks within the timekeeping system. We encourage you to share this information with other timekeeping administrators in your organization, so they too may increase their system knowledge. The information contained in this manual may also be found in the "Help & Support" section of the Main Menu. The link to reference for this information is titled "Help". If you have additional questions please contact your timekeeping provider for assistance. Thank you!

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Sites

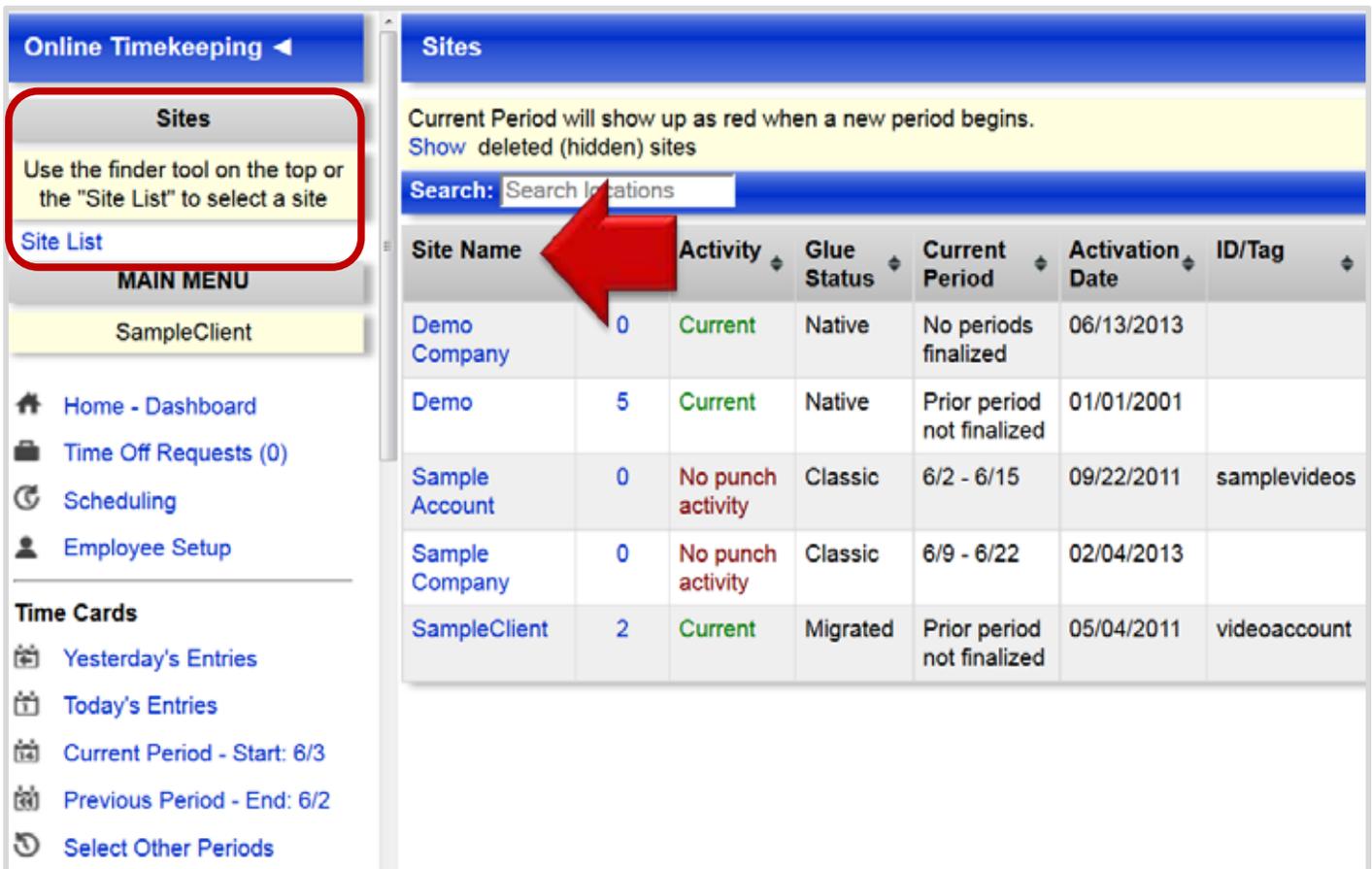
Site List — Multiple Site Management

The Multiple Sites Management tool gives you the ability to combine multiple sites into one site, thus avoiding the time consuming process of having to set up a login and password for each site or company you manage.

Note: To have this feature set up, please contact your timekeeping provider.

When the Multiple Site Management tool has been created for you, it will display as a “Site List,” and appear above the “Main Menu” on the home page.

In the example below, “Site List” is shown in the left pane. After you click on the “Site List” you will see the sites that you manage. The example shows five sites that display on the right pane, which can be managed from one location.



The screenshot shows the 'Online Timekeeping' interface. On the left, the 'Sites' menu item is highlighted with a red box, and a red arrow points to the 'Site List' link. The right pane displays a table of sites with the following data:

Site Name	Activity	Glue Status	Current Period	Activation Date	ID/Tag
Demo Company	0	Current	Native	No periods finalized	06/13/2013
Demo	5	Current	Native	Prior period not finalized	01/01/2001
Sample Account	0	No punch activity	Classic	6/2 - 6/15	09/22/2011 samplevideos
Sample Company	0	No punch activity	Classic	6/9 - 6/22	02/04/2013
SampleClient	2	Current	Migrated	Prior period not finalized	05/04/2011 videoaccount

Note: The “Summary Report” also allows for reporting on multiple sites.

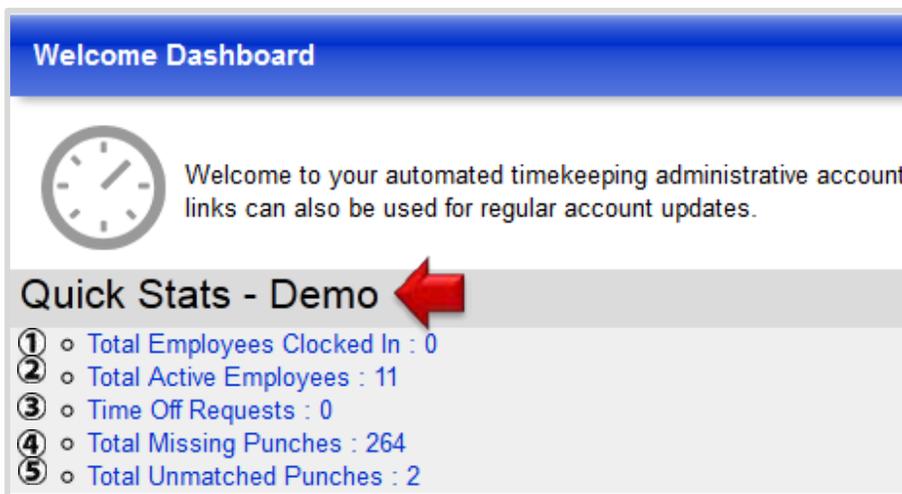
Main Menu

Welcome Dashboard

The “Welcome Dashboard” is a great way to quickly view the activity of your employees with the “Quick Stats” section. And the “Quick Links” section gives you quick access to the areas that you use more frequently. Use the text links as shortcuts to these areas.

Quick Stats:

1. “Total Employees Clocked In” displays the number of employees who are clocked in at the moment. Click on the text link, which will take you to the “Time Card” screen.
2. “Total Active Employees” shows the total number of employees who are actively clocking in and out.
3. The number of “Time Off Requests” sent from employees waiting to be approved.
4. “Total Missing Punches” displays the total number of missing punches flagged by the system when an employee incorrectly punches in or out.
5. “Total Unmatched Punches” shows the number of Unmatched punches which are punches that are received into timekeeping, but not matched to any employee. The most common reason for an unmatched punch is when an employee has not been added to the “Employee Setup.”



Quick Links:

1. The “Add a New Employee (Employee Setup)” link takes you directly to the “Employee Setup” screen, where you can add new employees and manage their profile.
2. “Update Personal Information” gives you the ability to change your Password, Name, Phone, and Email Address for your own account.
3. “Correct Missing Punches” are flagged by the system when an employee incorrectly completes a punch cycle, either by missing a clock in or out.

Main Menu

Welcome Dashboard Continued

4. "Assign Unmatched Punches" are punches received into timekeeping, but that could not be matched to any employee.
5. "Review Yesterday's Punches" will take you to the previous days punches for all employees who clocked in or out.
6. The "Edit time cards for the Current pay period" link takes you directly to the current pay periods time cards.
7. The "Edit time cards for the Prior pay period" link takes you directly to the previous pay periods time cards.
8. "Run the Summary Report" offers totals per employee for hours, wages, and prompt breakdowns.
9. "View Account Settings (Processing Rules)" allow you to view the specific rules which are setup for your company.
10. "Manage Login Accounts (Login Maintenance)" allows you to add or update supervisor or managers logins.

Welcome Dashboard



Welcome to your automated timekeeping administrative account links can also be used for regular account updates.

Quick Stats - Demo

- ① Total Employees Clocked In : 0
- ② Total Active Employees : 11
- ③ Time Off Requests : 0
- ④ Total Missing Punches : 264
- ⑤ Total Unmatched Punches : 2

Quick Links

Getting Started

- ① Add a new employee (Employee Setup)
- ② Update Personal Information

Daily

- ③ Correct Missing Punches
- ④ Assign Unmatched Punches
- ⑤ Review Yesterday's Punches

Each Pay Period

- ⑥ Edit time cards for the Current pay period
- ⑦ Edit time cards for the Prior pay period
- ⑧ Run the Summary Report

Optional

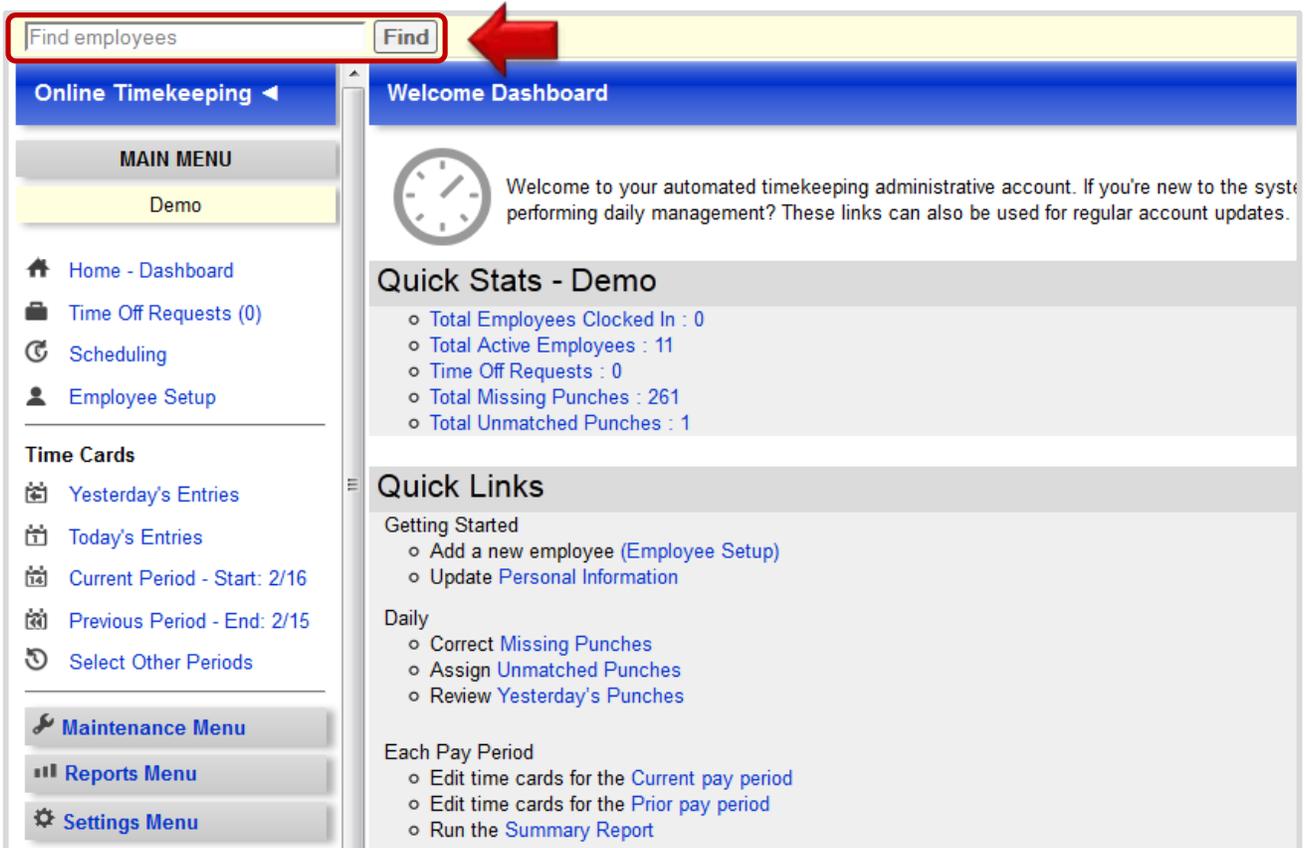
- ⑨ View account settings (Processing Rules)
- ⑩ Manage login accounts (Login Maintenance)

Main Menu

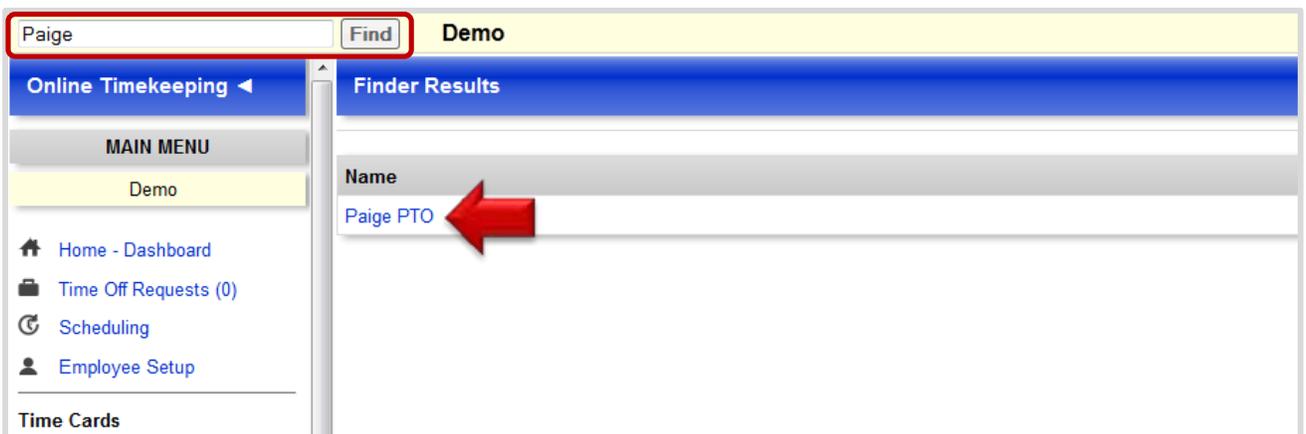
Find Employees

The “Find Employees” field enables you to quickly find an employee by simply typing in the first or last name of the employee. This feature can be found on the top left corner of the main page.

Step 1. Enter the name of the employee you are searching for then click on the “Find” button.



Step 2. The employee name will pull up under the “Finder Results” bar. Click on the employees name and you will be directed to the employee’s current time card.



Main Menu

[Time-off Requests - Intro & Employer Steps](#)

The “Time off Request” feature gives an employee the option to request time off through the Employee Self Service portal (ESS), while giving their supervisor the ability to approve or reject their request.

Note: Both supervisors and managers can use the ESS Portal to request time off from those who have authority to approve their Time Off Requests.

To set up email alerts for supervisors to receive the “Time off Request,” there are two core steps required. The first step is to setup the supervisor login with the necessary information.

Employer Steps:

Step 1. From the “Settings Menu” click on “Login Maintenance” found under “Quick Links.”

Step 2. Click the blue link associated with the supervisor login. (If the supervisor has not been set up, click “Add New Login.”)

Step 3. Add First Name, Last Name, and Email fields, which are required, in the “User Information” section.

Step 4. Click “Update User Information” to save any changes entered.

The screenshot displays the 'Login Management' interface. On the left is a sidebar with a 'Maintenance Menu' button. The main content area is titled 'Managing: Timekeeping Supervisor' and includes a 'Return to the list of logins' link. Below this is the 'USER INFORMATION' section, which contains a warning about personal contact information and several input fields: 'First Name' (Susie), 'Last Name' (Simple), 'Mobile Phone', 'Email Address' (susie@simple.com), and 'Confirm Email' (susie@simple.com). A red arrow points to the 'Update User Information' button. Another red arrow points to the 'Maintenance Menu' button in the sidebar. The 'PASSWORD RESET/CHANGE' section is also visible at the bottom.

Main Menu

[Time-off Requests - Employer or Supervisor Steps](#)

The second step is to enter the supervisor's first and last name into the "Supervisor" field of "Employee Setup."

Step 1. From the "Main Menu" select "Employee Setup."

Step 2. Click on the name of the employee.

Step 3. Click "Edit" next to the "Employee Data" section.

Step 4. Enter the supervisor's first and last name as it is listed in the supervisor login settings.

Step 5. Click "Save and Exit" or "Save and Remain."

Employee Setup	
Identity <input type="button" value="Edit"/>	
Employee Code	
First Name	Frank
Middle Name	
Last Name	Forgetful
Designation	
Phone	
E-mail	frank@forgetful.com
Start Date	2012-10-01
Separation Date	
Export Block	Not blocked
Web Clock Enabled	Yes
Mobile Punch Enabled	Yes
Mobile Enabled	Yes
Options	TIMEZONE=EST
Identifiers for punching the clock (card numbers, Web logins, PINs) - NOTE: Only the first three are usable as Web logins. <input type="button" value="Edit"/>	
Logins / Numbers	<input type="text" value="1001"/>
Self-service password	Password has been set and changed by employee
Employee Data <input type="button" value="Expand History"/> <input type="button" value="Edit"/>	
Title	Computer Tech
Department	DPT 300
Location	Main Street
Supervisor	Susie Simple
Home 1	Hourly

Main Menu

Time-off Requests - Employer or Supervisor Steps Continued

Once the supervisor has received an email notice, the request will need to be “Approved” or “Rejected.” This can be accomplished from the “Main Menu,” by clicking the “Time Off Requests” link.

Step 1. Click on the arrow next to “Instructions” for more details, and to run a report.

Note: The yellow triangle gives a warning that another employee in the same department has been approved for the same time off. Hover over the triangle for employee’s name and to see the dates requested.

To remove the triangle and names from displaying, contact your timekeeping provider.

Step 2. Click the “Calendar” arrow for a quick view of past, current, or future months with approved employee “Time Off Requests.” Hover over any of the days with the a green check mark to view employees with approved time off.

To view requests that have been rejected, check the box found in bottom left corner of the calendar “Show Rejected Requests.”

Note: If the Calendar bar does not display, contact your timekeeping provider to have this feature activated.

The screenshot displays the 'Time Off Requests' interface. On the left is a sidebar menu with sections: 'Online Timekeeping', 'MAIN MENU' (containing 'Timekeeping Demo', 'Dashboard', 'Time Off Requests (3)', 'Scheduling', 'Employee Setup'), 'Time Cards' (containing 'Yesterday's Entries', 'Today's Entries', 'Current Period - Start: 12/8', 'Previous Period - End: 12/7', 'Select Other Periods'), 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. Below the sidebar is a 'HELP & SUPPORT' section with 'Terms of Use' and 'Help' links, and the 'Timekeeping' logo with version and build information.

The main content area is titled 'Time Off Requests' and contains two expandable sections: 'INSTRUCTIONS' and 'CALENDAR'. The 'CALENDAR' section is expanded, showing a calendar for November, December 2013, and January. The calendar grid shows days with green checkmarks indicating approved requests. A yellow tooltip is visible over the date 13, listing: 'Job Code, Josh', 'Restaurant, Roberto', and 'Groups, Gavin'. At the bottom left of the calendar grid, there is a checkbox labeled 'Show Rejected Requests' which is currently unchecked.

Below the calendar is a summary section with expandable items: 'Pending (1)', 'Approved (11)', 'Conditionally Approved (3)', and 'Rejected (4)'.

Main Menu

Time-off Requests - Employer or Supervisor View

Step 3. To view “Pending,” “Approved,” “Conditionally Approved,” or “Rejected” requests, click on the corresponding arrow “>.” To approve a request, click on the green checkmark. To reject a request click on the orange “X.” To return the request to pending, click on the curved blue arrow.

Time Off Requests

- > INSTRUCTIONS
- > CALENDAR
- ▼ Pending (1)
 - > 12/13/2013 Job Code, Josh Friday, December 20, 2013 PENDING ✖ ✓
- ▼ Approved (2)
 - > 12/12/2013 PTO, Paige ⚠ Thursday, December 26, 2013 - Friday, January 3, 2014 APPROVED ✖ ↻
 - > 12/13/2013 Forgetful, Frank Thursday, December 26, 2013 APPROVED ✖ ↻
- ▼ Conditionally Approved (3)
 - > 12/12/2013 Forgetful, Frank Thursday, December 26, 2013 - Friday, December 27, 2013 CONDITIONALLY APPROVED
 - > 12/12/2013 Simple, Susie Wednesday, December 18, 2013 CONDITIONALLY APPROVED
 - > 12/12/2013 Groups, Gavin Tuesday, December 17, 2013 CONDITIONALLY APPROVED
- ▼ Rejected (13)
 - > 12/13/2013 Accruals, Austin ⚠ Thursday, December 26, 2013 REJECTED ✓
 - > 12/13/2013 Groups, Gavin Thursday, December 26, 2013 REJECTED ✓

Main Menu

Time-off Requests - Employer or Supervisor Changes

Step 4. Click on the arrow next to the employee's name for more details about the request (as seen in the screen sample below). The time off category field can be changed from the dropdown menu, for example to change vacation to sick time. Comments can also be added by a supervisor in the "Supervisor Comments" field; however, it is not required.

The screenshot displays the 'Time Off Requests' interface. At the top is a blue header with the text 'Time Off Requests'. Below this are three expandable sections: 'INSTRUCTIONS', 'CALENDAR', and 'Pending (1)'. The 'Pending (1)' section is expanded, showing a single request entry. The entry is highlighted with a red box and a red arrow pointing to it. The entry details are: '12/16/2013 Simple, Susie Tuesday, December 24, 2013'. To the right of the entry is the status 'PENDING' with a red 'X' icon and a green checkmark icon. Below the entry is a detailed view of the request: 'On 12/16/2013 Susie Simple requested the following days off using PTO - time: Tuesday, December 24, 2013'. This is followed by a summary: 'This equates to: Tuesday 4, Total 4'. Below that is the accrued time: 'This employee has accrued the following amount of time: SICK 16.00, VACATION 32.00, PTO 0.00'. At the bottom of the detailed view is the 'Employee Comments: Vacation' and a 'Supervisor Comments:' field with a red 'X' icon and a green checkmark icon. Below the detailed view are two more expandable sections: 'Approved (3)' and 'Conditionally Approved (1)'.

Note: To remove previously "Approved" and "Rejected" requests from displaying on this list, finalize the pay periods up to the current period from the "Finalized Pay Period" link. The request history can be accessed through the "Time Off Requests Report" or by un-finalizing pay periods.

Main Menu

Time-off Requests - Employer or Supervisor Request Overview

Step 5. If changes are made to the “Category” or “Hours” field, such as changing the category from vacation time to PTO, the “Time off Request” will move from “Pending” to “Conditionally Approved.” See example below.

The employee will then have the option to re-approve or reject the change.

Note: The “Sick” time which is in blue is not a hyperlink. The change in color signifies an edit or change has been made to the “Time off Request” just as an edit or change displays in blue on an employees time card.

▼ Conditionally Approved (2)

▼ 12/16/2013 Simple, Susie Tuesday, December 24, 2013 **CONDITIONALLY APPROVED**

Original Request

On December 16, 2013, Susie Simple submitted the following time off request:

<u>Date</u>	<u>Category</u>	<u>Hours</u>
Dec 24, 2013	PTO	8
		Total 8

Proposed Request

An unknown supervisor has changed the time off request to the following:

<u>Date</u>	<u>Category</u>	<u>Hours</u>
Dec 24, 2013	Sick	8
		Total 8

Employee Comments: Vacation
Supervisor Comments: Hours used should be Sick pay.

► 12/12/2013 Groups, Gavin Tuesday, December 17, 2013 **CONDITIONALLY APPROVED**

Main Menu

Time-off Requests - Employer or Supervisor Changes

Changing an approved “Time off Request:”

Once a “Time Off Request” has been approved the hours will automatically appear on the employee’s time card. Changes can be made from the time card through the “Modify” button.

Step 1. Click “Modify” and a pop up screen will appear.

Step 2. You may now make changes to the “Category” or “Hours” field. “Comments” are required before changes can be saved.

Step 3. Click “Save.”

Time Card - Jane Doe

Doe, Jane
Code: JANE

Timekeeping Demo
7/29/2014 thru 8/3/2014
Dept: DPT 300
Location: Main Street

< Previous Pay Period | Next Pay Period > Pay Period Finder:

Time Card Options ▾

Date	Edit	In	Out	Break	Category	Hours	Amount	Location
Tue 7/29	Add	-	-	-	-	-	-	-
Wed 7/30	Modify	-	-	-	Vacation	8:00		
Thu 7/31	Add							
Fri 8/1	Add							
Sat 8/2	Add							
Sun 8/3	Add							

Edit Time Off Request

Edit Time Off Request

To remove/delete a time off request, please visit the Time Off Request page and click the Red ✖ on the time off request you'd like to remove.

Category: Vacation
Date: Wednesday, July 30, 2014
Hours: 8

Comments: Only 4 hours of Vacation available. *Required

Save Close

Main Menu

Time-off Requests - Remove "Department time off list:"

From the "ESS Portal" a "Department time off list" link is available for employees to click, and see if other employees in the same department have time off already approved.

If employees are not allowed to view each other's approved time off for privacy, union, company policy, etc., please contact your timekeeping provider to have the option removed.

Employee Self Service Portal - Timekeeping Demo

Dashboard > INSTRUCTIONS

Web Clock > CALENDAR

Time Card

Time Off Requests

Accruals Report

Personal Information

Timekeeping

Log Out

▼ Add New Time Off Request

Department time off list

Type	Accrual balances as of 12/21/2013	Planned Time Off	Balance including planned time as of 12/21/2013
SICK	16 hours	0 hours	16 hours
VACATION	32 hours	0 hours	32 hours

Note: The balance including planned time does not account for future time accrued.

Category PTO

Single Day

Date

Hours 8

Multiple Days

Partial Day - Times

Description

The following people will receive a notification of this time off request

- Marcus Manager

(Optional) Send an email notification to the following managers

Timekeeping Demo

Save Request

Main Menu

Scheduling - Create a Schedule

The Scheduling feature allows users to create multiple schedules for their employees. Scheduling provides the ability to plan for the appropriate amount of labor hours coverage and to insure that the scheduled hours are completed by the designated employees. To create schedules follow the steps below.

Step 1. To use the scheduling feature click on the “Scheduling” link found under the “Main Menu.” If this option is not listed, contact your timekeeping provider.

Step 2. To add a new schedule, click on the “Set, View, or Modify Employee Schedule(s) by Workweek” link.

The screenshot displays the 'Scheduling' interface. On the left, the 'Scheduling' link in the 'MAIN MENU' is highlighted with a red box and a circled '1'. The main content area shows 'Scheduling Options' with the link 'Set, View, or Modify Employee Schedule(s) by Workweek' highlighted with a red box and a circled '2'. Below this are 'Reports' and a table with three columns: 'Welcome', 'What Is Scheduling?', and 'How Do I Start?'.

Welcome	What Is Scheduling?	How Do I Start?
Welcome to the "scheduling" portion of your time and attendance solution. Use this area of the system to insert and plan employee schedules, schedule time off, and ultimately better manage your employee's labor hours.	The purpose of a scheduling system is to allow employers to plan for the appropriate amount of labor coverage and insure that the scheduled hours are completed by the designated employees. Supervisors are therefore able to visually compare "expected hours worked" against "actual hours worked" for a given group of employees and time frame. Once a "schedule" has been created for individual employees, the system can then "flag", or notify, supervisors of a deviation from the expected schedule, to better control company and departmental needs.	To begin using scheduling options for your employees, select an option from the links provided above. Typically, the best place to start is by inserting a weekly schedule for an employee or group of employees. To start scheduling paid time off or add paid hours by category for an employee, select the provided link above.

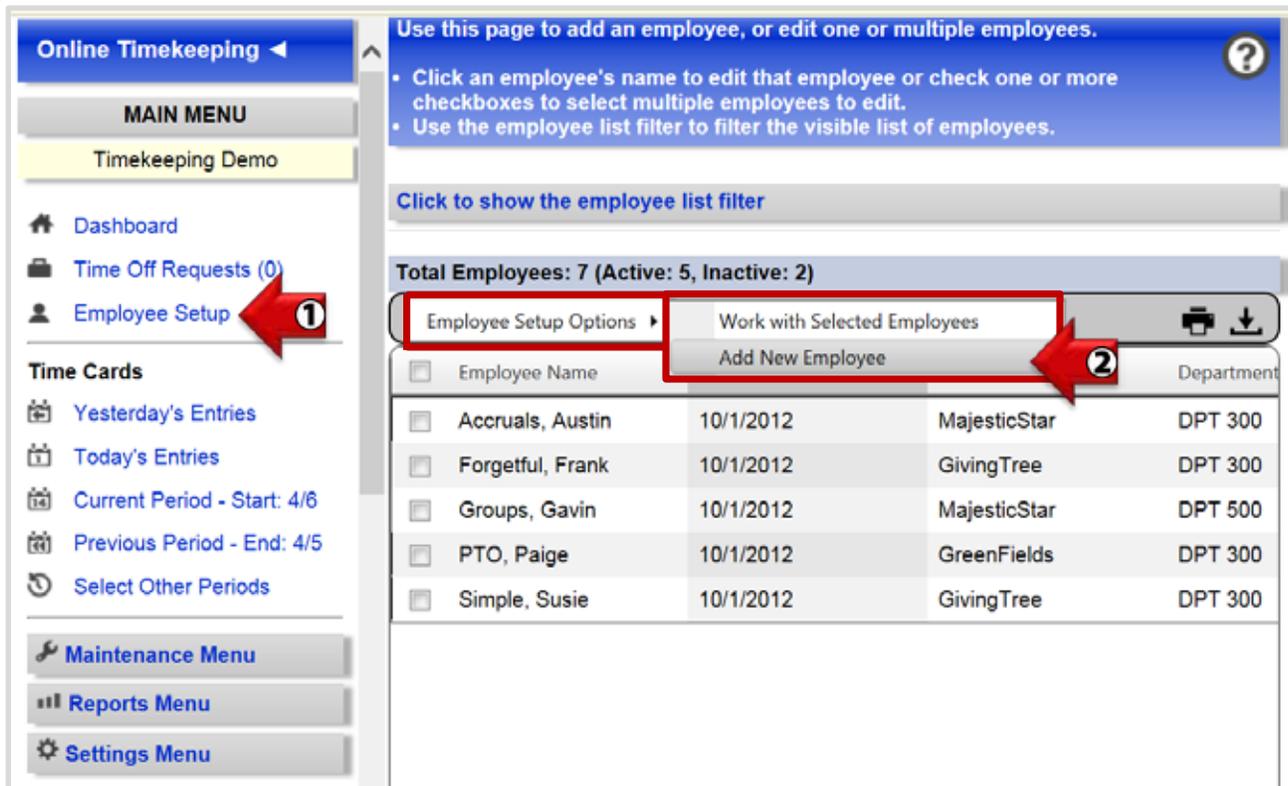
Main Menu

Employee Setup - Add New Employee

Adding a new employee to the timekeeping system is done by an authorized user. Managers or supervisors may not have access to set up a new employee.

Step 1. Click “Employee Setup” from the left pane.

Step 2. Select “Add New Employee” found in the “Employee Setup Options” list.



The screenshot shows the 'Employee Setup' page. On the left is a navigation pane with 'Employee Setup' highlighted and a red arrow labeled '1' pointing to it. The main content area has a blue header with instructions and a 'Click to show the employee list filter' button. Below that, it says 'Total Employees: 7 (Active: 5, Inactive: 2)'. A dropdown menu is open under 'Employee Setup Options', with 'Add New Employee' selected and a red arrow labeled '2' pointing to it. The table below lists employees with columns for checkboxes, names, dates, company names, and departments.

<input type="checkbox"/>	Employee Name			Department
<input type="checkbox"/>	Accruals, Austin	10/1/2012	MajesticStar	DPT 300
<input type="checkbox"/>	Forgetful, Frank	10/1/2012	GivingTree	DPT 300
<input type="checkbox"/>	Groups, Gavin	10/1/2012	MajesticStar	DPT 500
<input type="checkbox"/>	PTO, Paige	10/1/2012	GreenFields	DPT 300
<input type="checkbox"/>	Simple, Susie	10/1/2012	GivingTree	DPT 300

Step 3. There are 3 mandatory fields: First Name, Last Name, and Logins / Numbers. The other fields will be populated according to your company’s profile. Note: Hover your mouse over the field titles for brief description.

Step 4. Click “Save and Exit” or “Save and Add Another Employee” found at the bottom of the page. See below.

Main Menu

Employee Setup - Add New Employee Continued

Employee Setup ?

Identity

Employee Code	<input type="text"/>
First Name	<input type="text" value="John"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="Doe"/>
Designation	<input type="text"/>
Phone	<input type="text"/>
E-mail	<input type="text"/>
Start Date	<input type="text"/>
Separation Date	<input type="text"/>
Export Block	Not blocked <input type="button" value="v"/>
Web Clock Enabled	No <input type="button" value="v"/>
Options	<input type="text"/>
Birthday	<input type="text"/>

Identifiers for punching the clock (card numbers, Web logins, PINs)

Logins / Numbers	<input type="text" value="12345"/>	<input type="text"/>
Self-service password	New password: <input type="password" value="••••••••"/>	Enter again for verification: <input type="password"/>

Press Save without entering a password to lock employee out from all self-service functions.

Employee Data

Title	<input type="text"/>
Department	<input type="text"/>
Location	<input type="text"/>
Supervisor	<input type="text"/>
Home 1	<input type="text"/>
Home 2	<input type="text"/>
Home 3	<input type="text"/>

Main Menu

Employee Setup - Assign Employee to a Supervisor(s)

Assigning an employee to a supervisor gives the supervisor the ability to manage the employee's activity. This includes viewing and editing time cards, running reports, approving requested time off, adding PTO hours, setting and viewing schedules, and approving their pay period*.

Step 1. From the "Main Menu" click on "Employee Setup."

Step 2. Select the employee by clicking on the name.

Step 3. In the "Employee Data" section, enter the full name of the supervisor in the "Supervisor" field. (Additional supervisors can be added to this field by separating each supervisor with a comma.)

Step 4. Save by selecting "Save and Exit" or "Save and Remain."

Employee Data	
Title	<input type="text"/>
Department	<input type="text"/>
Location	<input type="text"/>
Supervisor	Susie Simple
Home 1	<input type="text"/>
Home 2	<input type="text"/>
Home 3	<input type="text"/>
AutoLunch Threshold (hrs)	<input type="text"/>
AutoLunch Deduct (mins)	<input type="text"/>
<input type="button" value="Save and Exit"/> <input type="button" value="Save and Remain"/> <input type="button" value="Cancel"/>	

*This feature is available upon request. Fees may apply.

Main Menu

Employee Setup - Assign Multiple Pay Rates

Step 1. If alternate pay rates are needed, the additional pay fields will have to be custom-added to your setup page by your timekeeping provider. Please contact them first then follow steps 2-5.

Step 2. Entering additional pay rates is accomplished in an employee's personal setup file. To access the file, click on the "Employee Setup" link from the "Main Menu".

Step 3. The company "Employee Setup" screen serves as both a navigational tool with hyperlinks to each employee's personal file and as a summary tool, as you can customize each of the columns displayed. The screen toolbar includes a drop-down menu containing all the "Employee Setup" items associated with table buttons such as Show Field and Hide Field to specify the table's display.

Step 4. From the setup screen you may operate in one of two ways: One "Add New Employee" record and two work with an individual employee by clicking on the desired name.

Step 5. Each alternate pay rate is coordinated with a specific department. "Alt Pay #1, 2 and 3" must be assigned to "Home 1, 2 and 3." The employee's default pay rate and Department fields will coincide. (See illustration below) A help pop-up display is available for all setup items by hovering over the item link.

Note: As alternate pay rates are, by necessity, connected with specific departments, the clock must know which department the employee is entering in order to assign the proper pay rate. Using "Clock Prompts" is the appropriate method to filter punch activity into separate departments. Refer to the "Clock Prompts" page for setup details.

Social Security Number	
Options	
Identifiers for punching the clock (card numbers, Web login:	
Logins / Numbers	9583
Self-service password	Password has been set
Employee Data Expand History Edit	
Title	
Department	200
Location	
Supervisor	
Home 1	100
Home 2	300
Home 3	700
AutoLunch Threshold (hrs)	
AutoLunch Deduct (mins)	
Default Pay Rate	\$12.00
Pay Rate 1	\$12.75
Pay Rate 2	\$14.00
Pay Rate 3	\$11.50
Return to list of employees	

Main Menu

Employee Setup - Auto Add Hours

“Auto Add Hours” allows the system to automatically populate hours on an employees time card on an ongoing basis. This feature works great for tracking salaried employee’s hours and “Labor Segments” such as Department or Location.

Other benefits include accurate reporting of hours worked by employees, tracking “Time off Requests,” and if applicable “Accrual” balances.

Before activating this feature the “Finalize Pay Period” will need to be finalized up to the current pay period to ensure “Auto Hours” from being applied to historical pay period data.

Note: To activate “Auto Add Hours” contact your timekeeping provider.

Online Timekeeping ◀

Clock Activity

4/6/2014 - 4/12/2014

Pay Period Finder:

Show Missing Only
(Back to Main Menu)

Search:

Employee	M	E	A
Accruals, Austin	0	8	
Forgetful, Frank	0	0	
Groups, Gavin	0	0	
PTO, Paige	0	0	
Simple, Susie	0	0	

Unmatched Punches (0)

Total employees listed: (5)

Print All Time Cards

Alphabetically
By Home Department
By Home Location
By Home Supervisor

Time Card - Gavin Groups ?

Groups, Gavin **Timekeeping Demo**
4/6/2014 thru 4/12/2014
Dept: DPT 500
Location: MajesticStar

< Previous Pay Period | Next Pay Period > Pay Period Finder:

Time Card Options ▾

Date	Edit	In	Out	Break	Category	Hours	Amount	Dept	
Sun 4/6	Add	-	-	-	-	-	-	-	
Mon 4/7	Edit Add	-	-	-	Salary	8:00		DPT 500	
Tue 4/8	Edit Add	-	-	-	Salary	8:00		DPT 500	
Wed 4/9	Edit Add	-	-	-	Salary	8:00		DPT 500	
Thu 4/10	Edit Add	-	-	-	Salary	8:00		DPT 500	
Fri 4/11	Edit Add	-	-	-	Salary	8:00		DPT 500	
Sat 4/12	Add	-	-	-	-	-	-	-	
Total hours clocked for week of 4/6 to 4/12: 0:00 (plus 40:00 not considered for OT)									
Totals							40:00	\$0.00	-

	HOURS	ADDL PAY
Total Salary hours	40:00 (40.00)	\$0.00
TOTALS	40:00 (40.00)	\$0.00

Category	Hours	Amount	Dept
-	-	-	-
Salary	8:00		DPT 500
Salary	8:00		DPT 500
Salary	8:00		DPT 500
Salary	8:00		DPT 500
Salary	8:00		DPT 500

V5 (0429E)

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Main Menu

Employee Setup - Auto-Lunch Deduction

Assigning an Auto-Lunch Deduction will activate an automatic deduction of desired minutes from an employee's time card after a specified amount of consecutive hours have been worked.

Step 1. Select the employee you wish to work with from the *Employee Setup* screen. In the third section titled Employee Data you will see both the AutoLunch Threshold and AutoLunch Deduct (see illustration below). If you do not see either of these fields you will need to contact your timekeeping provider to have them activated.

Step 2. AutoLunch Threshold (hrs). Enter the number of hours the employee will need to work before any time is deducted from their time card.

Step 3. AutoLunch Deduct (mins). Enter the number of minutes the employee is scheduled to take for their lunch break, most likely 30 or 60 minutes, however you may enter any amount.

Step 4. When your entry has been completed click either Save and Exit or Save and Remain.

Employee Setup	
Identity Edit	
Employee Code	
First Name	John
Middle Name	
Last Name	Doe
Designation	
Phone	
E-mail	
Start Date	
Separation Date	
Export Block	Not blocked
Web Clock Enabled	No
Options	
Identifiers for punching the clock (card numbers, Web logins, PINs) Edit	
Logins / Numbers	1001
Self-service password	Password has been set
Employee Data Expand History Edit	
Title	
Department	
Location	
Supervisor	
Home 1	
Home 2	
Home 3	
AutoLunch Threshold (hrs)	
AutoLunch Deduct (mins)	



Main Menu

Employee Setup - Employee List

A list of active and inactive employees can be found in the “Employee Setup” page. This page is useful for many reasons including adding new employees, inactivating employees, and viewing employees based on certain populated fields. This list can be sorted and filtered in many ways.

Filter the “Employee List”

Step 1. Select “Employee Setup” found in the “Main Menu.”

Step 2. “Click to show the employee list filter” found at the top of the employee list.

Step 3. Select the necessary radio button to set your filter.

Step 4. Select “Apply filter”.

The “Employee List” will display employees according to the selected filter criteria.

The screenshot shows the 'Employee Setup - Employee List' page. On the left is a navigation menu with 'Employee Setup' highlighted and marked with a red arrow and the number 1. At the top of the main content area, there is a blue banner with instructions and a link 'Click to show the employee list filter' marked with a red arrow and the number 2. Below this is a filter selection area with radio buttons for 'All active employees' (selected), 'All employees (including inactive)', 'Specific employees', 'All employees in group(s)', and 'Select by criteria'. The 'All employees (including inactive)' option is marked with a red arrow and the number 3. Below the radio buttons is an 'Apply filter' button marked with a red arrow and the number 4. Below the filter area, it shows 'Total Employees: (Active: 5, Inactive: 2)'. At the bottom is a table with columns: Employee Name, Department, Logins / Numbers, Start Date, and End. The table contains five rows of employee data.

<input type="checkbox"/>	Employee Name	Department	Logins / Numbers	Start Date	End
<input type="checkbox"/>	Accruals, Austin	DPT 300	1003	10/1/2012	
<input type="checkbox"/>	Forgetful, Frank	DPT 300	1001	10/1/2012	
<input type="checkbox"/>	Groups, Gavin	DPT 500	1009	10/1/2012	
<input type="checkbox"/>	PTO, Paige	DPT 300	1004	10/1/2012	
<input type="checkbox"/>	Simple, Susie	DPT 300	1006	10/1/2012	

Main Menu

Employee Setup - Employee-Specific Time Zones

Employee Specific Time Zones are sometimes necessary if one company has multiple locations that fall across multiple time zones. For example, one location may be in California and another in Idaho. It is recommended to set the company time zone to the majority and then the employee specific time zone in the Employee Setup page.

Step 1. Select the employee from the “Employee Setup” page.

Step 2. Click Edit in the Identity section.

Step 3. In the Options box, key in one of the following exactly:

TIMEZONE=PST / TIMEZONE=MST / TIMEZONE=MDT / TIMEZONE=CST / TIMEZONE=EST

Note: applying the time zone rule will affect the confirmation on the Web Clock as well as the time displayed on the timecards and reports. This feature also retroacts changing any time already collected.

Employee Setup	
Identity	
Employee Code	9583
First Name	Dorothy
Middle Name	
Last Name	Jones
Designation	
Phone	
E-mail	
Start Date	3/26/1987
Separation Date	
Export Block	Not blocked <input type="button" value="v"/>
Web Clock Enabled	No <input type="button" value="v"/>
Social Security Number	
Options	TIMEZONE=EST 
<input type="button" value="Save and Exit"/> <input type="button" value="Save and Remain"/> <input type="button" value="Cancel"/>	

Main Menu

Employee Setup - Inactive Employees

Employees are typically set to inactive when an employee is terminated from the company. The employee will not be purged from the timekeeping system but will be hidden from areas of the system such as Time Cards.

Step 1. Select the appropriate employee from the “Employee Setup page.”

Step 2. Click “Edit” from the “Identity” section.

Step 3. Populate the “Separation Date” field with the effective date.

Step 4. Click, “Save and Exit” or “Save and Remain.”

Employee Setup	
Identity	Edit
Employee Code	
First Name	Paige
Middle Name	
Last Name	PTO
Designation	
Phone	
E-mail	
Start Date	2012-10-01
Separation Date	
Export Block	Not blocked
Web Clock Enabled	Yes
Options	
Birthday	
Identifiers for punching the clock (card numbers, Web logins, PINs) Edit	
Logins / Numbers	1004
Self-service password	Password has been set and changed by employee
Employee Data	Expand History Edit
Title	
Department	DPT 300
Location	GreenFields
Supervisor	Susie Simple, Gavin Groups

The employee will no longer be visible in the “Employee Setup” list. **Note:** to reactivate an employee, simply remove the “Separation Date.”

Main Menu

Employee Setup - View Inactive Employees

Step 1. Select “Employee Setup” in the “Main Menu” section.

Step 2. “Click to show the employee list filter” found at the top of the employee list.

Step 3. Choose “All employees (including inactive).”

Step 4. Select “Apply filter.”

The screenshot shows the 'Employee Setup' page. On the left is a navigation menu with 'Employee Setup' highlighted. The main content area has a blue header with instructions. Below it is a filter section with radio buttons for 'All active employees', 'All employees (including inactive)', 'Specific employees', 'All employees in group(s)', and 'Select by criteria'. The 'All employees (including inactive)' option is selected. Below the filter is an 'Apply filter' button. A summary bar shows 'Total Employees: 7 (Active: 5, Inactive: 2)'. Below that is a table of employees with columns for Employee Name, Department, Location, and Start Date. Red arrows with numbers 1-4 point to the 'Employee Setup' menu item, the filter section, the selected radio button, and the 'Apply filter' button respectively.

Employee Setup Options

<input type="checkbox"/>	Employee Name	Department	Location	Start Date
<input type="checkbox"/>	Accruals, Austin	DPT 300	MajesticStar	10/1/2012
<input type="checkbox"/>	Forgetful, Frank	DPT 300	GivingTree	10/1/2012
<input type="checkbox"/>	Groups, Gavin	DPT 500	MajesticStar	10/1/2012
<input type="checkbox"/>	PTO, Paige	DPT 300	GreenFields	10/1/2012
<input type="checkbox"/>	Simple, Susie	DPT 300	GivingTree	10/1/2012

Main Menu

Employee Setup - Pay Rates

By default the “Employee Setup” page does not contain pay rate fields; however, pay rate fields can be added. A “Default Pay Rate,” as well as up to nine additional pay rate fields, can be enabled.

Additional pay rate fields are used for scripting purposes. For example, if an employee works in a specific department or job code, the employees pay rate can be equal to “Pay Rate 2” or “Pay Rate 3.”

Employees can also view pay rates on their time cards from the “Employee Self Service (ESS) Portal” If permissions are enabled. Permissions can also be enabled by a supervisor or client level login to allow pay rates to be editable on the employee’s time card.

Note: To add pay rates to the “Employee Setup” page please contact your timekeeping provider.

Online Timekeeping **Employee Setup**

MAIN MENU
Timekeeping Demo
Dashboard
Time Off Requests (0)
Employee Setup
Time Cards
Yesterday's Entries
Today's Entries
Current Period - Start: 11/17
Previous Period - End: 11/16
Select Other Periods
Maintenance Menu
Reports Menu
Settings Menu
HELP & SUPPORT
Terms of Use
Help
Timekeeping
Web Server: Stage - WJAPP35
Version: 1.1.5065.27759
Build Date: 9/11/2013 4:39:27 AM

Identity [Edit](#)

Employee Code	
First Name	Susie
Middle Name	
Last Name	Simple
Designation	
Phone	
E-mail	
Start Date	2012-10-01
Separation Date	
Export Block	Not blocked
Web Clock Enabled	Yes

Options

Identifiers for punching the clock (card numbers, Web logins, PINs) [Edit](#)

Logins / Numbers	1008
Self-service password	Password has been set and changed by employee

Employee Data [Expand History](#) [Edit](#)

Title	Sales
Department	DPT 300
Location	
Supervisor	Marcus Manager
Home 1	
Home 2	
Home 3	

Default Pay Rate	\$10.25
Pay Rate 1	\$14.50
Pay Rate 2	\$9.75
Pay Rate 3	\$12.00

[Return to list of employees](#)

Main Menu

Employee Setup - Protect Historical Data

When applying changes to an account such as rounding rules, pay frequency, or scripts; both future and past records will be altered by default. If changes to previous pay periods are unwanted, the appropriate records must be finalized to be protected. Refer to the “Finalize Pay Period” article for further instructions.

Changes made to the “Employee Data” section of the “Employee Setup” page will only take effect on the date specified. (See illustration)

Step 1. Select “Employee Setup” from the “Main Menu.”

Step 2. Choose the name of employee the changes will affect.

Step 3. Click “Edit” in the “Employee Data” section.

Step 4. Apply the necessary changes and choose the “Effective” date.

Step 5. Click “Save and Exit” or “Save and Remain” found at the bottom of the page.

The screenshot shows a web application interface for employee setup. On the left is a sidebar menu with sections: 'Online Timekeeping', 'MAIN MENU' (containing 'Demo'), 'Time Cards', 'Maintenance Menu', 'Reports Menu', 'Settings Menu', and 'HELP & SUPPORT'. The 'Employee Setup' link in the 'MAIN MENU' is highlighted with a red arrow. The main content area is titled 'Demo' and contains a form for 'Identifiers for punching the clock (card numbers, Web logins, PINs)'. The form fields include: 'Logins / Numbers' (54327), 'Self-service password' (Password has been set), 'Employee Data' (highlighted with a red arrow), 'Title', 'Department' (Laundry), 'Location' (Main Street), 'Supervisor' (Fred), 'Home 1', 'Home 2', 'Home 3', 'Default Pay Rate' (12.00), 'AutoLunch Threshold (hrs)' (6.00), 'AutoLunch Deduct (mins)' (30.00), 'Pay Rate 1', 'Pay Rate 2', 'Pay Rate 3', 'Pay Rate 4', and 'Accrual Factor'. The 'Default Pay Rate' field has a dropdown menu showing 'Effective today: 2/27/2013', which is also highlighted with a red arrow. At the bottom of the form are buttons for 'Save and Exit', 'Save and Remain', and 'Cancel'.

Main Menu

Employee Setup - Track Salary Employees

In some cases, the salaried employee, those not assigned to an hourly wage, will clock in/out for tracking purposes only. Time data may not be necessary for payroll processing. This function is supported by blocking the salary employee's data from the payroll file.

Step 1. From the "Main Menu" click on "Employee Setup."

Step 2. Select the employee by clicking on their name or add the employee by clicking "Add New" at the top of the employee list.

Step 3. Find "Export Block" in the "Identity" section and choose "Yes-Blocked" from the drop-down.

Step 4. Click "Save and Exit" or "Save and Remain."

Identity	
Employee Code	
First Name	Barry
Middle Name	
Last Name	Blank
Designation	
Phone	
E-mail	
Start Date	<small>If enabled, employee time will not be exported to payroll (such as for salary employees whose time is tracked for recordkeeping purposes only)</small>
Separation Date	
Export Block	Yes - Blocked
Web Clock Enabled	Yes
Options	
Save and Exit Save and Remain Cancel	
Identifiers for punching the clock (card numbers, Web logins, PINs)	
Logins / Numbers	54327
Self-service password	Password has been set
Employee Data	
Title	
Department	Laundry
Location	Main Street
Supervisor	Fred

Note: The option to create a Salary group is available for use in other areas of the site. To find out more about groups, please reference the "Employee Groups" how-to article.

Main Menu

Employee Setup - Work with Selected Employees

“Work with Selected Employees” is found in the “Employee Setup” area and allows for changes to employee setup fields in a bulk manner. This feature is a wonderful timesaver especially when there are many employees and/or if changes happen often. “Work with Selected Employees” is most commonly used when applying the Auto Lunch feature, adding a new Supervisor, or updating Departments and Locations.

Step 1. Select “Employee Setup” from the left pane. The list of employees will appear in the right pane.

Step 2. Check the boxes next to the employee names that the change will affect.

Step 3. Select “Work with Selected Employees” option found in the “Employee Setup Options list. See illustration below.

The screenshot shows the 'Employee Setup' page. On the left is a navigation pane with 'Employee Setup' selected. The main area has a blue header with instructions and a table of employees. A red box highlights the 'Employee Setup Options' menu, and a red arrow points to the 'Work with Selected Employees' option. Another red arrow points to the checkbox for 'Forgetful, Frank' in the employee list.

<input type="checkbox"/>	Employee Name			Start Date
<input type="checkbox"/>	Accruals, Austin	DPT 300	MajesticStar	10/1/2012
<input checked="" type="checkbox"/>	Forgetful, Frank	DPT 300	GivingTree	10/1/2012
<input type="checkbox"/>	Groups, Gavin	DPT 500	MajesticStar	10/1/2012
<input type="checkbox"/>	PTO, Paige	DPT 300	GreenFields	10/1/2012
<input type="checkbox"/>	Simple, Susie	DPT 300	GivingTree	10/1/2012

Main Menu

Employee Setup - Work with Selected Employees Continued

Step 4. Verification: Look at the top of the “Multiple Employee Editor” page to confirm the employees you have selected.

Step 5. To remove information, simply check the box next to the field and leave the field blank. To add or update information, populate the necessary field with the changes and set the effective date. Once complete, click “Save” at the bottom of the page. See illustration below.

The screenshot shows the 'Multiple Employee Editor' interface. On the left is a navigation menu with 'Online Timekeeping' and 'MAIN MENU' (containing 'Demo', 'Home - Dashboard', 'Time Off Requests (0)', 'Scheduling', and 'Employee Setup'). Below this are 'Time Cards' (Yesterday's Entries, Today's Entries, Current Period - Start: 2/16, Previous Period - End: 2/15, Select Other Periods) and three menu buttons: 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. The main content area is titled 'Multiple Employee Editor' and contains the text 'This screen is used to edit fields that are common to each employee.' Below this, it states '- You have selected 2 employees to edit.' and lists 'Job Code, Josh' and 'Forgetful, Frank'. A red arrow with the number '4' points to this list. Below the list is a form with several fields: 'Web Clock Enabled' (Yes), 'Export Block' (Yes), 'Separation Date', 'Start Date', 'Options', 'Title' (Shop Supervisor, Effective today: 2/26/2013), 'Department', 'Location', 'Supervisor', 'Home 1', 'Home 2', 'Home 3', 'Default Pay Rate', and 'AutoLunch'. A red arrow with the number '5' points to the 'Title' field.

Time Cards

Time Card Management - Add Comments to a Time Card

This feature allows the employer, supervisor, or employee (if given permission to edit their time card) to add “Comments” to a punch In or punch Out while in edit mode on the time card. The “Comments” can then be viewed by hovering over the edited time punch in the In or Out fields, and from the “Punch Notes” report.

Online Timekeeping ◀

Clock Activity

6/2/2013 - 6/8/2013
Pay Period Finder:
 Show Missing Only
(Back to Main Menu)

Search: Search Employees

Employee	M	E
Apple, Austin	0	3
Darts, Darcy	0	0
Doe, Jane	0	0
Forgetful, Frank	0	0
Harmless, Haylee	0	0
Simple, Susie	0	0

Unmatched Punches (0)

Show Only Missing Punches

Date	Edit	In	Out	Break	Category	Hours
Sun 6/2		-	-	-	-	-
Mon 6/3	Cancel Save	8:23a			Regular	
Tue 6/4						
Wed 6/5		-	-	-	-	-
Thu 6/6		-	-	-	-	-
Fri 6/7		-	-	-	-	-

Comments about this edit:
Stuck in traffic this morning.
(Comments appear only in edit history)

Time Cards

Time Card Management - Add Holiday Hours

To add Holiday Pay to multiple employees or specific groups of employee's time cards you will need to manually add them through the "Quick Add Time Card Entries" link. This link is found on the "Main Menu" under the "Maintenance Menu" bar.

Step 1. Select which employees you want to work with by clicking on one of the four radio buttons.

Step 2. Key in a date or select a date from the calendar pop up.

Step 3. From the drop-down field select the pay code Holiday.

Step 4. Enter the number of hours to be paid for the Holiday.

Step 5. Adding a comment in the optional edit comments field will flag the employee's timecard with a note. You can view this comment by placing your mouse over the holiday hours on the employee's time card or by running a "Punch Notes Report."

Step 6. Click the Submit button. The system will then ask you to confirm the hours before they are applied.

The screenshot shows a web form titled "Quick Add Batch of Entries To Time Cards". Below the title is a yellow instruction bar: "This screen is used for adding the same entry to multiple time cards, such as hours worked, holiday pay, and bonuses." The form contains several fields and a list of radio buttons:

- Add entries to which employees?**: A list of radio buttons with the following options:
 - All active employees
 - Specific employees
 - All active employees in group
 - Select by criteria
- Add entries for what date?**: A text input field.
- Add what kind of entry?**: A dropdown menu currently showing "Regular".
- Hours to add**: A text input field.
- Optional edit comments**: A text input field.
- Submit**: A button at the bottom right of the form.

Time Cards

Time Card Management - Edit a Time Card

Step 1. To edit an employee's time card begin at the "Time Cards" section under "Main Menu". Here you have the option to edit a single day or a pay period. Select one of these options to continue. See below.

The screenshot shows the 'Online Timekeeping' interface. On the left is a 'MAIN MENU' sidebar with 'Timekeeping Demo' highlighted. Below it are links for 'Dashboard', 'Time Off Requests (1)', and 'Employee Setup'. The 'Time Cards' section is circled in red and contains links for 'Yesterday's Entries', 'Today's Entries', 'Current Period - Start: 7/27', 'Previous Period - End: 7/26', and 'Select Other Periods'. At the bottom of the sidebar are 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. The main content area is titled 'Dashboard' and includes a welcome message, a 'Quick Stats - Timekeeping Demo' section with various metrics, and a 'Quick Links' section with 'Getting Started' and 'Daily' tasks.

Online Timekeeping ◀

MAIN MENU

Timekeeping Demo

Dashboard

Time Off Requests (1)

Employee Setup

Time Cards

Yesterday's Entries

Today's Entries

Current Period - Start: 7/27

Previous Period - End: 7/26

Select Other Periods

Maintenance Menu

Reports Menu

Settings Menu

Dashboard

Welcome to your automated timekeeping administrative account. If you're new to the system, see below for a list of common tasks to get started. These links can also be used for routine account updates.

Quick Stats - Timekeeping Demo

- Total Employees Clocked In: 4
- Total Active Employees: 9
- Time Off Requests: 1
- Total Missing Punches: 6
- Total Unmatched Punches: 0
- Total Employees with Mobile Enabled: 9
- Total Employees with Mobile Punch Enabled: 9
- Total Employees with Web Clock Enabled: 6
- Last Finalized Pay Period: 7/6/2014
- New Release: Release Notes

Quick Links

Getting Started

- Add a new employee [Employee Setup](#)
- Update [Personal Information](#)

Daily

- Correct [Missing Punches](#)

Step 2. Next, select an employee to work with by clicking on their name. You should now see the employee's time card.

Step 3. To edit or add a punch, click on the appropriate button and enter the change.

Time Cards

Online Timekeeping | **Time Card - Austin Accruals**

Accruals, Austin | Timekeeping Demo | 3/23/2014 thru 3/29/2014 | Dept: DPT 300 | Location: MajesticStar

Pay Period Finder: | [< Previous Pay Period](#) | [Next Pay Period >](#)

Time Card Options ▾

Date	Edit	In	Out	Break	Category	Hours	Hrs/day	Amount	Dept
Sun 3/23		-	-	-	-	-	-	-	-
Mon 3/24	<input type="button" value="Add"/>	9:12a	11:56a	-	-	2:44	↓	500	
	<input type="button" value="Edit"/> <input type="button" value="Add"/>	12:25p	5:39p	-	-	5:14	7:58	500	
Tue 3/25	<input type="button" value="Add"/>	9:16a	1:55p	-	-	4:39	↓	500	
	<input type="button" value="Edit"/> <input type="button" value="Add"/>	Missing	5:40p	-	-		4:39	300	
Wed 3/26	<input type="button" value="Add"/>	8:24a	12:00p	-	-	3:36	↓		
	<input type="button" value="Edit"/> <input type="button" value="Add"/>	12:31p	5:23p	-	-	4:52	8:28		
Thu 3/27	<input type="button" value="Edit"/> <input type="button" value="Add"/>	9:16a	Clocked in	-	-	-	-	-	-
Fri 3/28	<input type="button" value="Add"/>	-	-	-	-	-	-	-	-
Sat 3/29	<input type="button" value="Add"/>	-	-	-	-	-	-	-	-
Totals						21:05	21:05	\$0.00	-

Total hours clocked for week of 3/23 to 3/29: **21:05**

	HOURS	ADDL PAY
Total Regular hours	21:05 (21:08)	\$0.00
TOTALS	21:05 (21:08)	\$0.00
TOTAL EDITED PUNCHES	3	

Annotations: A red arrow labeled '2' points to the 'Accruals, Austin' link in the left sidebar. A red arrow labeled '3' points to the 'Edit' button for the entry on Wednesday 3/26.

Step 4. Once this is done click the Save button to complete. See below.

Time Card - Austin Accruals

Accruals, Austin | Timekeeping Demo | 3/23/2014 thru 3/29/2014 | Dept: DPT 300 | Location: MajesticStar

Pay Period Finder: | [< Previous Pay Period](#) | [Next Pay Period >](#)

Time Card Options ▾

Date	Edit	In	Out	Break	Category	Hours	Amount	Dept
Sun 3/23		-	-	-	-	-	-	-
Mon 3/24		9:12a	11:56a	-	-	2:44		500
		12:25p	5:39p	-	-	5:14		500
Tue 3/25		9:16a	1:55p	-	-	4:39		500
	<input type="button" value="Cancel"/> <input type="button" value="Save"/> <input type="button" value="Delete"/>	<input type="text" value="2:30p"/>	<input type="text" value="5:40p"/>	<input type="text"/>	Regular ▾			<input type="text" value="300"/>
Wed 3/26						3:36		
						4:52		

Comments about this edit:
Auston forgot to clock back IN from lunch break
(Comments appear only in edit history)

Annotation: A red arrow labeled '4' points to the 'Save' button in the edit form for Tuesday 3/25.

Time Cards

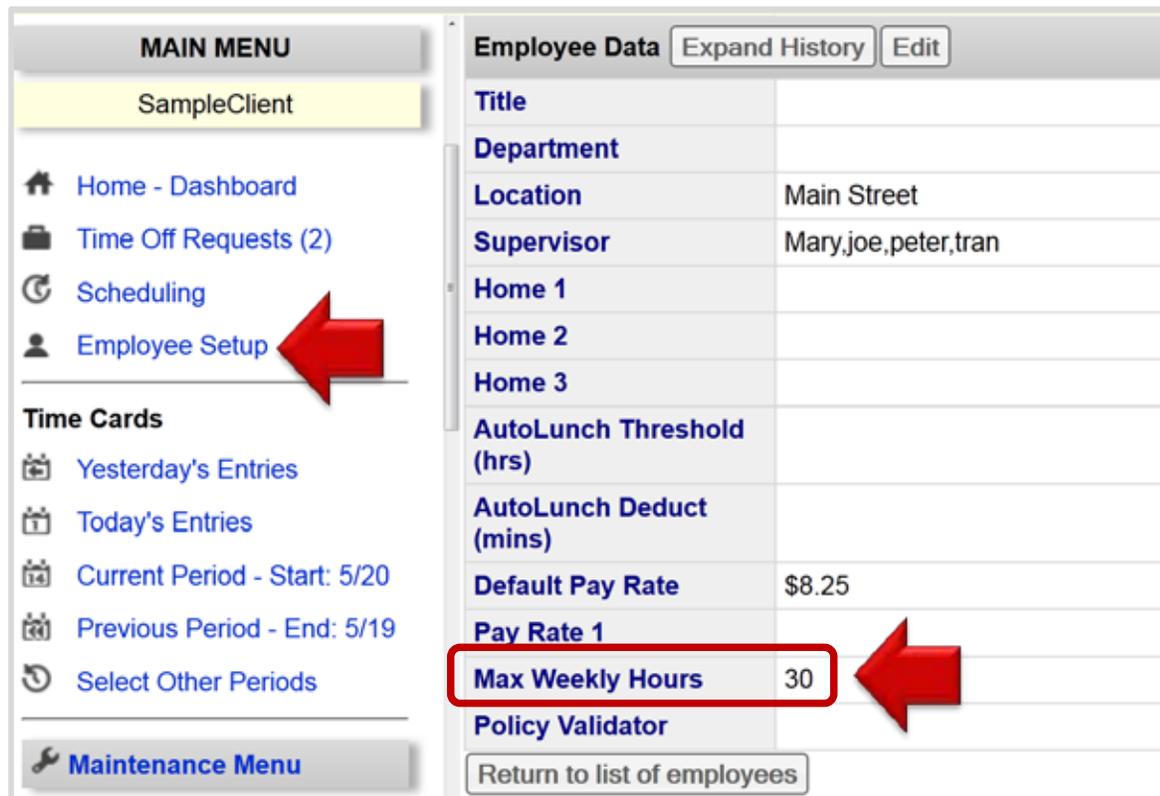
Time Card Management - Hours Alert

The “Hours Alert” tool is used to give a notification on an employee’s time card, as well as the “Daily Auto Email” report, when they are close to reaching a set amount of hours in a work week. This tool is a great way to help manage hours for the Affordable Care Act (PPACA), but can be used in other instances as well, such as overtime warnings.

Note: For more information on activating this rule, and discussing its many benefits, please contact your timekeeping provider.

An example of this would be to set a notification to alert you when an employee approaches 30 hours in the work week. See below.

- Once the “Hours Alert” rule is activated by your timekeeping provider, a new column called “Max Weekly Hours” is added to the employee profiles on the “Employee Setup” page.
- In the “Max Weekly Hours” field, you have the ability to set, and change the total number of max hours for the trigger to send a notification per employee. A date stamp will also display in this field. In the example below, the max hours have been set to 30 hours.



The screenshot displays the 'Employee Setup' page for 'SampleClient'. The left sidebar contains a 'MAIN MENU' with options: Home - Dashboard, Time Off Requests (2), Scheduling, Employee Setup (highlighted with a red arrow), Time Cards (Yesterday's Entries, Today's Entries, Current Period - Start: 5/20, Previous Period - End: 5/19, Select Other Periods), and Maintenance Menu. The main content area is titled 'Employee Data' and includes 'Expand History' and 'Edit' buttons. The data table lists fields: Title, Department, Location (Main Street), Supervisor (Mary,joe,peter,tran), Home 1, Home 2, Home 3, AutoLunch Threshold (hrs), AutoLunch Deduct (mins), Default Pay Rate (\$8.25), Pay Rate 1, Max Weekly Hours (30, highlighted with a red box and a red arrow), and Policy Validator. A 'Return to list of employees' button is at the bottom.

Employee Data	
Title	
Department	
Location	Main Street
Supervisor	Mary,joe,peter,tran
Home 1	
Home 2	
Home 3	
AutoLunch Threshold (hrs)	
AutoLunch Deduct (mins)	
Default Pay Rate	\$8.25
Pay Rate 1	
Max Weekly Hours	30
Policy Validator	

Time Cards

Time Card Management - Hours Alert Continued

- The notification will appear as an information icon, a blue circle with an “i” in the “Alert” column. To view its message hover over the icon. An example of a message might be “employee will hit 30 hours at 4:33pm” or “the employee will hit 30 hours in 5 hours.”
- In this example, the “Hours Alert” rule was set by the timekeeping provider to trigger a notification 10 hours before the employee reaches the max hours of 30.
- The “Hours Alert” can also be set up with a “Clock Prompt” by your timekeeping provider. In the example below the “Clock Prompt” is the “Hours Notice” column. The notification is displayed in text form on the employee’s time card. See below.

Date	Alert	In	Out	Break	Category	Hours	Hrs/day	Amount	Hours Notice
Sun 5/26		-	-	-	-	-	-		
Mon 5/27		6:00a	11:00a	-		5.00	↓		
		11:30a	4:30p	-		5.00	10.00		
Tue 5/28		6:01a	11:00a	-		4.98	↓		
		11:33a	4:33p	-		5.00	9.98		
Wed 5/29		5:58a	11:01a	-		5.05	↓		Employee will reach 30 hours in 4.97 hours.
		11:35a	Missing	-			5.05		Employee will reach 30 hours at 4:33 pm.
Thu 5/30		-	-	-	-	-	-		-
Fri 5/31		-	-	-	-	-	-		-
Sat 6/1		-	-	-	-	-	-		-
Total hours clocked for week of 5/26 to 6/1: 25.03									

Note: The “Hours Alert” can display on other reports. Contact your timekeeping provider for details as fees may apply.

Time Cards

Time Card Management - Missing Punches

“Missing Punches” are flagged by the system when an employee incorrectly completes a punch cycle. Because the employee is required to specify whether they are clocking in or out, if either one is skipped, the timecard will display a missing punch flag.

Note: An automated alert is not available if punches are missing; however, a daily report can be sent via email to provide all punch activity for the previous day. See the “Daily Auto Email” report for more details.

There are two options for correcting a missing punch. Follow the steps below to learn how.

Option One

Step 1. Select “Yesterday’s Entries” from the left pane.

Step 2. Punches from the previous day for ALL employees will be displayed. You can scroll through to see the missing punches or choose “Show Only Missing Punches” from the “Time Card Options” drop-down.

Step 3. Click the “Edit” button and key the missing time into the empty field.

Step 4. Click “Save” once finished.

The screenshot displays the 'Online Timekeeping' interface for 'Multiple Time Cards for 3/27/2014'. The left-hand navigation menu includes sections for 'MAIN MENU', 'Time Cards', 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. Under 'Time Cards', 'Yesterday's Entries' is selected. The main content area shows a table of punches with columns for Name, Edit, In, Out, Break, Category, Hours, Hrs/day, and Amount. Several punches are marked as 'Missing' in red text. Red arrows highlight the 'Yesterday's Entries' menu item, the 'Time Card Options' dropdown, and the 'Missing' status for Samuel Hourly.

Name	Edit	In	Out	Break	Category	Hours	Hrs/day	Amount
Basics, Roberto	Edit Add	10:55a	Missing	-			-	
Breaktime, Millie	Edit Add	11:13a	4:18p	-		5.07	↓	
	Edit Add	4:31p	8:28p	-		3.96	9.03	
Hourly, Samuel	Edit Add	Missing	6:55p	-			-	
Lemming, Frank	Edit Add	11:09a	6:55p	-		7.76	7.76	
Lunches, Leon	Edit Add	11:12a	7:43p	-0.50		8.01	8.01	
Rounded, Ricky	Edit Add	2:45p	8:45p	-		6.00	6.00	
Totals						30.80	30.80	\$0.00

Time Cards

Time Card Management - Missing Punches Continued

Option Two

Step 1. Select “Current Period” from the left pane

Step 2. A list of the employee names will appear along with columns titled M (Missing Punches) and E (Edited Punches). The number associated with the M column indicates the number of missing punches found on that employee’s timecard for that specific pay period. The employee names listed in red is another indication of missing punches.

Step 3. Punches for the current pay period will be displayed. You can scroll through the page to see the missing punches or choose “Show Only Missing Punches” from the “Time Card Options” drop-down to narrow the search.

Step 4. Select the employee in need of the edit by clicking their name.

Step 5. Click the “Edit” button and key the missing time into the empty field.

Step 6. Click “Save” once finished.

Online Timekeeping | **Time Card - Paige Timestamps**

This is a demo account. Feel free to make changes to the data. The changes will be discarded when you log out.

Timestamps, Paige | **Demo - Basic**
Code: 789 | 3/23/2014 thru 3/29/2014

Pay Period Finder: | [< Previous Pay Period](#) | [Next Pay Period >](#) | Pay Period Finder:

Time Card Options ▼

- Show Only Missing Punches
- Show Unrounded Times

	Out	Break	Category	Hours	Hrs/day	Amount
Mon 3/24	12:58p	3:16p	-	2.30	↓	
Tue 3/25	3:47p	9:03p	-	5.27	7.57	
Wed 3/26	Missing	9:48p	-		-	
Thu 3/27	11:09a	5:55p	-	6.77	6.77	
Fri 3/28	11:57a	8:55p	-	8.97	8.97	
Sat 3/29	11:44a	8:56p	-	9.20	9.20	
Total hours clocked for week of 3/23 to 3/29: 41.74						
Totals				41.74	41.74	\$0.00

	HOURS	ADDL PAY
Total Regular hours	41.74	\$0.00
TOTALS	41.74	\$0.00
TOTAL MISSING PUNCHES	1	

Employee List:

Employee	M	E
Basics, Roberto	1	0
Blank, Barry	0	0
Breaktime, Millie	0	0
Hourly, Samuel	1	0
Lemming, Frank	1	0
Lunches, Leon	0	0
Proper, Paul	0	0
Punches, Josh	0	0
Rounded, Ricky	0	0
Simple, Susie	1	0
Timestamps, Paige	1	0

Unmatched Punches (1)
Total employees listed: (11)

[Print All Time Cards](#)
[Alphabetically](#)

Time Cards

Time Card Management - Pay Rate Override

Default pay rates may need to be overridden for any number of reasons. As an example, an employee's standard rate of pay is \$10.25 per hour, but attends a training seminar and should be paid \$15.75 per hour for the training hours. The process to override pay rates is easily done case-by-case.

Step 1. Select "Current Period" from the left pane.

Step 2. Click the employee's name from the left pane.

Step 3. The employee's time card will appear. Click "Edit" on the day necessary.

Step 4. Override the default pay rate by populating the "Pay Rate" box.

Step 5. Click "Save" on the left next to the date.

The screenshot displays the 'Time Card - Susie Simple' interface. On the left, the 'Employee' list includes 'Simple, Susie' with a red arrow and the number '2' pointing to her name. The main area shows a time card grid for the week of 3/24 to 3/28. The grid has columns for Date, Edit, In, Out, Break, Category, Hours, Amount, and Pay Rate. On Tuesday, 3/25, the 'Pay Rate' column shows '\$10.25/hr' and a text input field containing '15.75'. A red arrow and the number '4' point to this input field. A dialog box titled 'Comments about this edit:' is open over the Tuesday row, with a red arrow and the number '5' pointing to the 'Save' button. The dialog box contains a text input field and the text '(Comments appear only in edit history)'. At the bottom of the grid, a yellow bar indicates 'Total hours clocked for partial week of 3/23 to 3/28: 24:07'. The 'Totals' row shows 24:07 hours and \$0.00 amount.

Date	Edit	In	Out	Break	Category	Hours	Amount	Pay Rate	
Mon 3/24		-	-	-	-	-	-	-	
Tue 3/25		9:16a	12:00p	-		2:44	\$10.25/hr	15.75	
Wed 3/26						7:52	\$10.25/hr		
Thu 3/27		9:00a	5:31p	-0:30		8:01	\$10.25/hr		
Fri 3/28		-	-	-	-	-	-	-	
Total hours clocked for partial week of 3/23 to 3/28: 24:07									
Totals							24:07	\$0.00	-

Time Cards

Time Card Management - Print Time Cards

You are able to print all time cards sorted “Alphabetically,” by “Department,” by “Location,” by “Supervisor,” or individually without running a specific report.

Step 1. To access quick-print links for employee time cards, go to the “Time Cards” section found under the “Main Menu.” From here select any of the four options or enter a specific date range by clicking on “Select Other Periods.”

The screenshot displays the 'Online Timekeeping' dashboard. On the left is a 'MAIN MENU' sidebar with a 'Time Cards' section highlighted by a red rounded rectangle. This section includes links for 'Yesterday's Entries', 'Today's Entries', 'Current Period - Start: 11/10', 'Previous Period - End: 11/9', and 'Select Other Periods'. Below this are 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. At the bottom of the sidebar are 'HELP & SUPPORT' links for 'Terms of Use' and 'Help'. The main dashboard area has a 'Dashboard' header, a welcome message with a clock icon, and a 'Quick Stats - Timekeeping Demo' section with the following data:

- Total Employees Clocked In: 0
- Total Active Employees: 7
- Time Off Requests: 1
- Total Missing Punches: 1
- Total Unmatched Punches: 0

Below the stats is a 'Links' section with a red arrow pointing to it from the sidebar. The links are categorized as follows:

- Getting Started**
 - Add a new employee [Employee Setup](#)
 - Update [Personal Information](#)
- Daily**
 - Correct [Missing Punches](#)
 - Assign [Unmatched Punches](#)
 - Review [Yesterday's Punches](#)
- Each Pay Period**
 - Edit time cards for the [Current pay period](#)
 - Edit time cards for the [Prior pay period](#)
 - Run the [Summary Report](#)
- Optional**
 - View account settings [Processing Rules](#)
 - Manage login accounts [Login Maintenance](#)

Step 2. Depending on the number of employees, you may need to scroll down to the last employee to see the “Print All Time Cards” section in the left pane. Here you have four options to print time cards. Select the order you would like the time cards to be printed.

Time Cards

Time Card Management - Print Time Cards Immediately

Step 1. To print single time cards immediately click on the desired employee's name.

Step 2. Once you see the time card, click on the printer icon in the top left corner.

Step 3. You will then be prompted to either open the record for printing or to save. For best results use the PDF file format.

Online Timekeeping | **Time Card - Gavin Groups**

Clock Activity
3/30/2014 - 4/5/2014
Pay Period Finder:
 Show Missing Only
(Back to Main Menu)

Search: Search Employees

Employee	M	E	A
Accruals, Austin	0	2	2
Forgetful, Frank	0	0	2
Groups, Gavin	0	0	2
PTO, Paige	0	0	2
Simple, Susie	0	0	2

Unmatched Punches (0)
Total employees listed: (5)

Print All Time Cards

Alphabetical By Home

Time Card Options

Date	Edit	In	Out	Break	Category	Hours	Amount
Sun 3/30	Add	-	-	-	-	-	-
Mon 3/31	Edit Add	-	-	-	Salary	8:00	
Tue 4/1	Edit Add	-	-	-	Salary	8:00	
Wed 4/2	Edit Add	-	-	-	Salary	8:00	
Thu 4/3	Edit Add	-	-	-	Salary	8:00	

Timekeeping Demo
3/30/2014 thru 4/5/2014
Dept: DPT 500
Location: MajesticSta

Do you want to open or save TimeCard_Timekeeping Demo_3_31_2014_2_06_14_PM.pdf (4.64 KB) from payrollservers.us?

Open Save Cancel

Time Cards

Time Card Management - Punch Categories

“Punch Categories” are the “Category” selections found on an employees time card that can be changed while in edit mode. The selections for “Category” are displayed as a drop down menu, and include Regular (overtime and regular are combined as one category, therefore, overtime will not display as a separate category in the dropdown list), Sick, Vacation, Personal, Holiday, Misc, Bonus, and Commission.

Depending on what the needs for your company are, you can choose to remove all the “Category” selections, except Regular, and replace with the categories that work for you, or simply have additional categories added to the standard list.

The screenshot displays the 'Time Card - Susie Simple' interface. On the left, there is a sidebar with 'Online Timekeeping' and a list of employees: Accruals, Austin; Forgetful, Frank; Groups, Gavin; PTO, Paige; and Simple, Susie. The main area shows the time card for Susie Simple for the pay period 3/30/2014 - 4/5/2014. A table lists dates from Sun 3/30 to Sat 4/5. The 'Category' column for Mon 3/31 is being edited, with a dropdown menu open showing options: Regular, Sick, Vacation, Personal, Holiday, Misc, Bonus, and Commission. A red arrow points to this dropdown. A 'Comments about this edit' box is overlaid on the table, containing a text input field and the note '(Comments appear only in edit history)'. The 'Totals' row at the bottom shows 'Total hours clocked for week of 3/30 to 4/5: 0:00'.

Date	Edit	In	Out	Break	Category	Hours
Sun 3/30		-	-	-	-	-
Mon 3/31	Cancel Save	8:00a	5:00p		Regular	
Tue 4/1		-	-	-	-	-
Wed 4/2		-	-	-	-	-
Thu 4/3		-	-	-	-	-
Fri 4/4		-	-	-	-	-
Sat 4/5		-	-	-	-	-
Total hours clocked for week of 3/30 to 4/5: 0:00						
Totals						0:00

Note: To change or add selections to the “Category” field on the time cards, contact your Timekeeping Provider.

Time Cards

Time Card Management - Punch History

The “Punch History” is a great way to view the history in detail of what has occurred with any specific punch IN or Out on an employee’s time card, much like an audit trail.

To view “Punch History” you have two options. One, hover over a clock In or Out punch on the employee’s time card. Two, run the “Punch Notes Report” found in the “Reports” menu.

In the example below the “Punch History” displays the following information in the pop up box:

- “1” means there was one occurrence for this time punch. This will also reflect as many edits as is made to a specific punch In/Out.
- The “Clock” indicates that the punch was made from a physical time clock at the City Creek location.
- “901404459” is the serial number of the time clock.
- “OUT” shows the punch was a “clock out” along with the date and time.

Note: Depending on the set up and features active on your account, you may have additional information on your “Punch History” such as department, IP address, Mileage, ect.

The screenshot displays the 'Online Timekeeping' interface. On the left, there is a sidebar with 'Clock Activity' for the period 6/1/2013 - 6/15/2013, a 'Pay Period Finder' with a search box, and a list of employees with columns for 'M', 'E', and 'A'. The main area shows a time card for Saturday, June 1st, 2013, with an 'In' time of 8:05a and an 'Out' time of 3:28p. A red arrow points from the 'Out' time to a 'Punch History' pop-up box. The pop-up box contains the following text: '1. Clock CITY CREEK (901404459) OUT Jun 1 2:28:46pm -7'. Below the time card, there is a summary table for the week.

Date	Edit	In	Out	Punch History	on-OT	OT	Amc
Sat 6/1	Edit Add	8:05a	3:28p	1. Clock CITY CREEK (901404459) OUT Jun 1 2:28:46pm -7	-	7.39	-
Total hours clocked for week							
Sun 6/2	Add	-	-	-	-	-	-
Mon 6/3	Add	-	-	-	-	-	-
Tue 6/4	Edit Add	8:01a	6:04p	-	-	10.06	10.06

Time Cards

Time Card Management - Show Unrounded Punches

When a rounding rule is active, the employee's time card will display the clock "IN" or "OUT" times in green. The original punches, or real time punches, can be viewed from within the employee's time card by clicking "Show Unrounded Times."

Note: To activate a rounding rule contact your timekeeping provider.

Step 1. Go to the "Main Menu," and select one of the options to view "Time Cards." (For the examples below the "Current Period" was selected).

Step 2. From an employee's time card, click on "Time Card Options" and select "Show Unrounded Punches." Real time punches will be displayed on the time card beneath the rounded punch.

The screenshot displays the 'Time Card - Austin Accruals' interface. On the left, there is a sidebar with navigation options like 'Online Timekeeping', 'Clock Activity', and a list of employees. The main area shows a table of punches for 'Accruals, Austin'. A red box highlights the 'Time Card Options' dropdown menu, which includes 'Show Only Missing Punches' and 'Show Unrounded Times'. A red arrow points to the 'Show Unrounded Times' option. The table below shows punch times in green, indicating rounded times. The 'Totals' row at the bottom shows a total of 24:30 hours clocked for the partial week of 3/23 to 3/26.

Employee	M	E	A	In	Out	Break	Category	Hours	Hrs/day	Amount		
Accruals, Austin	0	24		9:15a	12:00p	-		2:45	↓			
Forgetful, Frank	0	2		12:30p	5:45p	-		5:15	8:00			
Groups, Gavin	0	0		9:15a	2:00p	-		4:45	↓			
PTO, Paige	0	2		2:30p	5:45p	-		3:15	8:00			
Simple, Susie	0	6		8:30a	12:00p	-		3:30	↓			
				12:30p	5:30p	-		5:00	8:30			
Totals										24:30	24:30	\$0.00

Time Cards

Time Card Management - Show Unrounded Punches Continued

Step 3. To remove the displayed “Unrounded Punches” simply click “Hide Unrounded Times.”

Time Card - Austin Accruals ?

Accruals, Austin

[< Previous Pay Period](#) | [Next Pay Period >](#) Pay Period Finder:

Timekeeping Demo
3/24/2014 thru 3/26/2014
Dept: DPT 300
Location: MajesticStar

Time Card Options ▾

Show Only Missing Punches

Hide Unrounded Times

	In	Out	Break	Category	Hours	Hrs/day	Amount
3/24	9:12:00a	12:00p 11:56:00a	-		2:45	↓	
	12:30p 12:25:00p	5:45p 5:39:00p	-		5:15	8:00	
Tue 3/25	9:15a 9:16:00a	2:00p 1:55:00p	-		4:45	↓	
	2:30p 2:26:00p	5:45p 5:52:00p	-		3:15	8:00	
Wed 3/26	8:30a 8:24:00a	12:00p	-		3:30	↓	
	12:30p 12:31:00p	5:30p 5:23:00p	-		5:00	8:30	

Time Cards

Time Card Management - Time Card Approvals

Time Card Approvals is a feature that allows an employee, supervisor, and/or manager to have the ability to approve time cards electronically prior to payroll. This eliminates the cost of printing and storing signed time cards while still ensuring the approval process takes place.

Note: To activate Approvals contact your timekeeping provider. Additional fees may apply.

Understanding Approval Images:

- No image means the Approvals feature is not active.
- One level of Approval - Own status 
- Two levels of Approval - Own and another's statuses 
 - I. If logged in as a supervisor the larger image on the left is the supervisor with the employee on the right.
 - II. If logged in as an employee the image on the left is the employee, with the supervisor on the right.
- Three levels of Approval - Own and two others' statuses 
 - I. If logged in as a supervisor the middle image the supervisor, the employee on the left and management on the right.
 - II. If logged in as an employee the middle image is the employee, the supervisor on the left and management on the right.
 - III. If logged in as management the middle image is management, the left is the employee and the right side the supervisor)

The Time Card Approval process can be accomplished in two ways.

- One, approve only certain days by selecting the approval image then clicking on “Time Card Options,” “Approve Time Card” and “Approve Selected.” In the example below the time card is set at one level of approval.
 - (1) Click on the yellow approval image for a single day to be approved.
 - (2) The image background will turn black indicating this image has been selected and will allow you to select additional days.
 - (3) Click on the Approve Selected button found at the top of the page to approve.
 - (4) The approval image will then change to green indicating the approval was accepted.

Time Cards

Time Card Management - Time Card Approvals Continued

Time Card - Susie Simple ?

Simple, Susie

[< Previous Pay Period](#) | [Next Pay Period >](#) Pay Period Finder:

Timekeeping Demo
 3/30/2014 thru 4/2/2014
 Dept: DPT 300
 Location: GivingTree

Time Card Options ▾
Show Only Missing Punches

Approve Time Card ▸

Approve All Entries
Approve Selected ③

		In	Out	Break	Category	Hours	Hrs/day	Amount
Mon 3/31	① Add	8:33a	12:01p	-	-	3:28	↓	
	Edit Add	12:30p	5:00p	-		4:30	7:58	
Tue 4/1	② Add	7:59a	12:00p	-		4:01	↓	
	Edit Add	12:32p	4:59p	-		4:27	8:28	
Wed 4/2	④ Add	8:00a	12:13p	-		4:13	↓	
	Edit Add	12:45p	5:01p	-		4:16	8:29	
Total hours clocked for partial week of 3/30 to 4/2: 24:55								
Totals						24:55	24:55	\$0.00

Time Cards

Time Card Management - Time Card Approvals Continued

- Two, approve the whole pay period by clicking “Approve All Entries.” Once approved the approval image will change from yellow to green. In the example below, the time card has three levels necessary for approval.

Time Card - Susie Simple ?

Simple, Susie **Timekeeping Demo**
3/30/2014 thru 4/2/2014
Dept: DPT 300
Location: GivingTree

[< Previous Pay Period](#) | [Next Pay Period >](#) Pay Period Finder:

Time Card Options ▾

Show Only Missing Punches

Approve Time Card ▸

		In	Out	Break	Category	Hours	Hrs/day	Amount
Mon 3/31 	<input type="button" value="Edit"/> <input type="button" value="Add"/>	8:33a	12:01p	-	-	3:28	↓	
	<input type="button" value="Edit"/> <input type="button" value="Add"/>	12:30p	5:00p	-	-	4:30	7:58	
Tue 4/1 	<input type="button" value="Edit"/> <input type="button" value="Add"/>	7:59a	12:00p	-	-	4:01	↓	
	<input type="button" value="Edit"/> <input type="button" value="Add"/>	12:32p	4:59p	-	-	4:27	8:28	
Wed 4/2 	<input type="button" value="Edit"/> <input type="button" value="Add"/>	8:00a	12:12p	-	-	4:12	↓	
	<input type="button" value="Edit"/> <input type="button" value="Add"/>	12:45p	5:01p	-	-	4:16	8:28	
Total hours clocked for partial week of 3/30 to 4/2: 24:54								
Totals						24:54	24:54	\$0.00

To “UN-approve” a time card, simply edit or add information to a time card. Once the changes are saved you will then need to approve the time card again, along with any other levels of approvals needed.

Note: For approval reporting options, see the “Approvals Report” found in the “Reports Menu.”

Time Cards

Time Card Management - Tomorrow Rule

The “Tomorrow Rule” is typically used when a shift has hours that cross the midnight hours, or when an entire shift needs to display on the actual day worked.

Note: To have the “Tomorrow Rule” activated and set up to your company’s requirements, contact your timekeeping provider.

An example would be to have all punches with an OUT punch between 12:00am and 3:00am moved to the next day. In the example below the employee clocked in at 10:00pm on Sunday.

Date	Edit	In	Out	Break	Category	Hours
Sun 5/12 	<input type="button" value="Edit"/> <input type="button" value="Add"/>	10:00p	Clocked in	-		
Mon 5/13 	<input type="button" value="Add"/>	-	-	-	-	-
Tue 5/14 	<input type="button" value="Add"/>	-	-	-	-	-

When the employee clocked out for lunch at 2:00am, both punches were moved to the next day. The “-1” indicates this punch was pushed forward one day. The full shift now displays on the same day.

Date	Edit	In	Out	Break	Category	Hours	Hrs/day
Sun 5/12 	<input type="button" value="Add"/>	-	-	-	-	-	-
Mon 5/13 	<input type="button" value="Edit"/> <input type="button" value="Add"/>	10:00p-1	2:00a	-		4:00	↓
	<input type="button" value="Edit"/> <input type="button" value="Add"/>	2:30a	6:30a	-		4:00	8:00
Tue 5/14 	<input type="button" value="Add"/>	-	-	-	-	-	-

Maintenance Menu

Accruals

Accruals allow the time and attendance system to track Paid-Time-Off (PTO) hours that have been earned, or used based on a specific HR policy. As an example, a semi-monthly employee who has met their one year anniversary may earn 40 vacation hours within the year. Their time would have accrued at 1.67 hours at the close of each pay period.

In most cases, accruals can be administered by the payroll software package; however, having the accruals feature in the time and attendance system creates convenience for employers as well as the employees. Balances can be adjusted instantly by either adding to or subtracting from the current balances and an expiration date may also be put in place.

Available Accrual Balances as of Tuesday, February 5, 2013			
All balances are as of the end of the listed reporting date.			
Name	Sick	Vacation	
Blank, Barry	0.00	0.00	
Forgetful, Frank	2.00	0.00	
Job Code, Josh	2.50	0.00	
Location, Leon	4.50	0.00	
Mileage, Millie	2.75	0.00	
Prompts, Paul	2.50	0.00	
PTO, Paige	-72.00	-96.00	
Restaurant, Roberto	2.25	0.00	
Rounded, Ricky	2.25	0.00	
Shift, Samuel	3.00	0.00	
Simple, Susie	1.50	0.00	
Totals	-48.75	-96.00	

Note: Sample "Available Accrual Balances" report. TimeWorksPlus. February 2013

How to Set Up Accruals

Step 1. Complete the Accrual Form to ensure your accruals are properly set up.

Step 2. Submit the form to your time and attendance provider.

Maintenance Menu

Adjust Accrual Balances

Adjusting accrual balances is commonly done if a balance was originally entered incorrectly. Balance totals can be either added to or subtracted from. The process to adjust a balance is simple though sensitive due to the effective date.

Note: For access to the “Adjust Accrual Balances” page, the Accruals Processing Rule must be activated. Contact your time and attendance provider for details. Additional fees may apply.

Step 1. Select “Adjust Accrual Balances” from the “Maintenance Menu.”

Step 2. Choose the employee(s) you would like to work with. “All active employees,” “Specific employees” (from within a group, Check All, or manually make your selection) or “Select by criteria.”

Step 3. Choose which category’s balance you want to adjust. **Note:** the options provided are custom to your settings.

Step 4. Choose the effective date. **Note:** It is important to be sure of the date you are selecting. If a date is incorrect and an attempt to adjust the mistake occurs, incorrect accrual balances may result. Corrections are possible but the best solution is to be sure of your effective date.

Step 5. Click “Show Employees and Balances.”

Find employees Demo

Accrual Balance Adjustment

Employee(s) whose balances you want to adjust

All active employees
 Specific employees
from within

Mileage, Millie

Which category's balance do you want to adjust?

Sick
 Vacation

What will be the effective date of your changes?

Maintenance Menu

- Home - Dashboard
- Time Off Requests (0)
- Scheduling
- Employee Setup
- Time Cards**
- Yesterday's Entries
- Today's Entries
- Current Period - Start: 4/1
- Previous Period - End: 3/31
- Select Other Periods
- Maintenance Menu**
- Adjust Accrual Balances**
- Employee Groups
- Finalize Pay Period
- Quick Add Time Card Entries
- Unmatched Punches

Maintenance Menu

Adjust Accrual Balances Continued

Step 6. Choose the type of balance changes to make. Either “add,” “subtract,” or “Replace” existing balance. Note: Click “Explain choices” for more details.

Step 7. Enter an expiration date if desired. If the field is populated, any balance will be forfeited if not used by the specified date. Note: Click “Explain expiration” for more details.

Step 8. Enter the desired amounts and click “Save changes” when complete.

Accrual Balance Adjustment

Type of balance changes to make: [Explain choices](#)

Effective date of changes: 2013-04-10

Expiration date of any added balance: [Explain expiration](#)

Name	Sick Balance as of 2013-04-10	Amount
Blank, Barry		<input type="text"/>
Forgetful, Frank	2.00	<input type="text"/>
Job Code, Josh	2.50	<input type="text" value=".50"/>
Location, Leon	4.25	<input type="text" value="-.25"/>
Mileage, Millie	2.75	<input type="text" value="2"/>
Prompts, Paul	2.50	<input type="text"/>
PTO, Paige	-192.00	<input type="text"/>
Restaurant, Roberto	2.25	<input type="text"/>
Rounded, Ricky	2.25	<input type="text"/>
Shift, Samuel	3.00	<input type="text"/>
Simple, Susie	1.50	<input type="text"/>

Maintenance Menu

Employee Groups

The “Employee Groups” feature lets you group employees together for easy selection elsewhere in the site. One example would be to use “Employee Groups” when setting up supervisor permissions. Employees can be selected from a list, or can be defined by matching certain criteria.

Two kinds of groups are available. A “List Group” contains a specific selection of employees, and is automatically created when you choose employees individually with checkboxes.

A “Smart Group” is created when you choose criteria that can be automatically matched (such as their name, department, or other selection). Employees are automatically added to and dropped from smart groups whenever their information is updated.

Create an “Employee Group”

Step 1. From the home page, go to the “Maintenance Menu” and click on “Employee Groups.” Then click “Add New Group.” (See illustration 1.1).

The screenshot shows the 'Employee Groups' page. On the left is a navigation sidebar with a 'Maintenance Menu' section containing several options, with 'Biometrics Maintenance' highlighted. The main area displays a table of existing groups and an 'Add New Group' button.

Group Name	Employees in group
Auto Salary	Smart group: Gavin Groups
BI-WEEKLY PAY GROUP	List group: Austin Accruals, Frank Forgetful, Josh Job Code, Paige PTO, Roberto Restaurant, Susie Simple
Can EDIT their own time card	List group: Gavin Groups, Susie Simple
DPT 200	Smart group: None
DPT 300	Smart group: Josh Job Code, Roberto Restaurant, Sally Salaried, Gavin Tugboat Mr.
DPT 500	List group: Gavin Groups
FEMALE EMPLOYEES	List group: Paige PTO, Susie Simple
FULL TIME EMPLOYEES	Smart group: Austin Accruals, Frank Forgetful, Gavin Groups, Josh Job Code, Paige PTO, Roberto Restaurant, Sally Salaried, Susie Simple, Tommy Time Card Mr., Gavin Tugboat Mr.
Hourly Employees	List group: Austin Accruals, Josh Job Code, Paige PTO, Roberto Restaurant
JOB CODE (WR-502789)	List group: Austin Accruals, Josh Job Code, Paige PTO
LOCATION - City Center	List group: Austin Accruals, Roberto Restaurant, Susie Simple
Male Employees	List group: Austin Accruals, Frank Forgetful, Gavin Groups, Josh Job Code, Roberto Restaurant
Monthly Pay Group	List group: Gavin Groups

(Illustration 1.1)

Step 2. Enter the “Name of this group,” (See illustration 1.2).

Maintenance Menu

Employee Groups Continued

Step 3. Determine “Who can see this group?”

Step 4. Decide “Who is in the group?” by selecting one of the four radio buttons.

- To create a **List Group**, select “Specific employees” by checking the checkboxes next to the individual employee’s names. Selections can also be made from an existing “Employee Group” through the dropdown menu.

Employee Group: Department 2	
Name of this group	Operations
Who can see this group?	<input checked="" type="radio"/> Everyone <input type="radio"/> Just me
Who is in this group?	<input type="radio"/> All active employees <input type="radio"/> All employees (including inactive) <input checked="" type="radio"/> Specific employees from within Active Employees Check All Uncheck All <input checked="" type="checkbox"/> Accruals, Austin <input type="checkbox"/> Groups, Gavin <input type="checkbox"/> Overtime, Oscar <input checked="" type="checkbox"/> Simple, Susie <input type="checkbox"/> Bulletin, Bethany <input checked="" type="checkbox"/> Job Code, Josh <input type="checkbox"/> PTO, Paige <input checked="" type="checkbox"/> Tugboat, Talon Mr. <input type="checkbox"/> Forgetful, Frank <input checked="" type="checkbox"/> Mileage, Marcus <input type="checkbox"/> Restaurant, Roberto <input type="radio"/> Select by criteria
Action	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/>

(Illustration 1.2)

- To create a **Smart Group**, choose “Select by criteria.” From employee dropdown menu choose from Active, Inactive, or All Employees to build your smart list from. Enter the filtering options. In the example below (illustration 1.3) the filter is set for employees with Department equal to Operations, meaning if the Department field in the “Employee Setup” page has the word Operations entered, then those employees will be added to this Employee Smart Group.

New Employee Group	
Name of this group	Operations
Who can see this group?	<input checked="" type="radio"/> Everyone <input type="radio"/> Just me
Who is in this group?	<input type="radio"/> All active employees <input type="radio"/> All employees (including inactive) <input type="radio"/> Specific employees <input checked="" type="radio"/> Select by criteria For each employee , include if... Department = Operations <input type="button" value="Advanced"/> Advanced Custom Selection Help
Action	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

V5 (0429E) (Illustration 1.3)

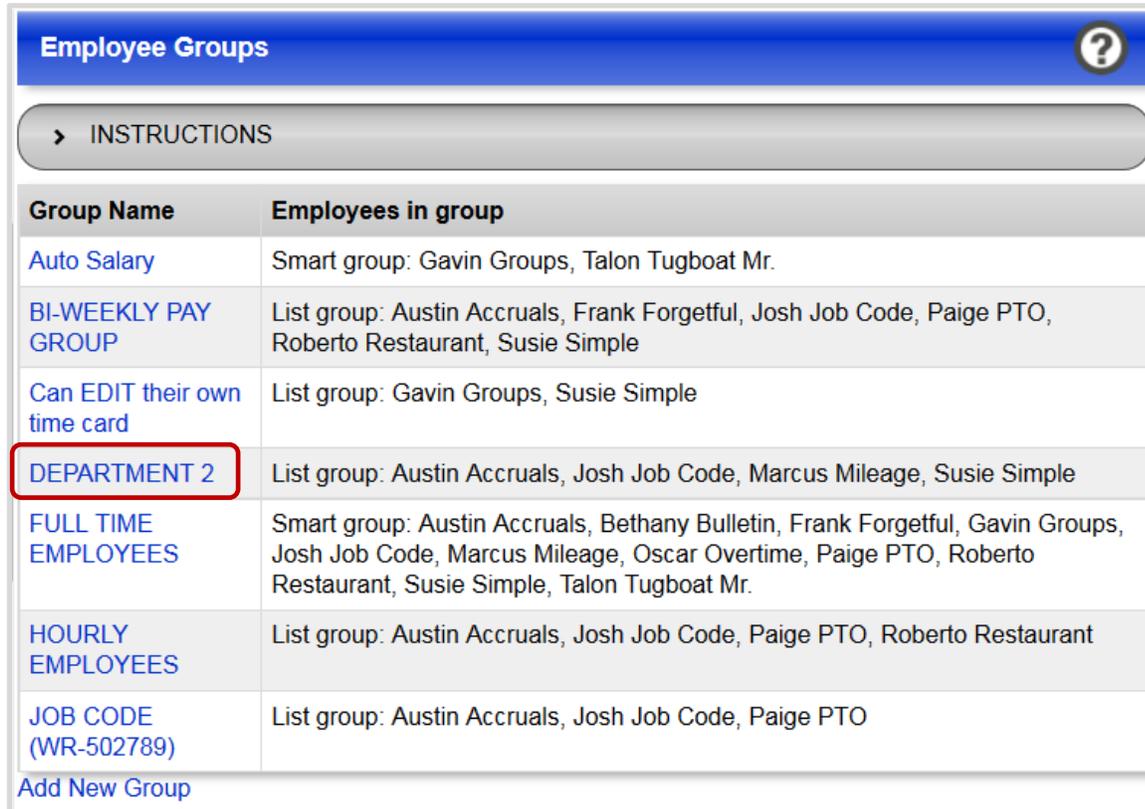
Maintenance Menu

Employee Groups Continued

Step 5. Click the “Save” button to save the “Employee Group.”

Edit an existing “Employee Group”

Step 1. From the “Employee Groups” page click on the “Group Name” you would like to edit. For this example “Department 2” was selected. (See illustration 1.3).



Employee Groups 	
INSTRUCTIONS	
Group Name	Employees in group
Auto Salary	Smart group: Gavin Groups, Talon Tugboat Mr.
BI-WEEKLY PAY GROUP	List group: Austin Accruals, Frank Forgetful, Josh Job Code, Paige PTO, Roberto Restaurant, Susie Simple
Can EDIT their own time card	List group: Gavin Groups, Susie Simple
DEPARTMENT 2	List group: Austin Accruals, Josh Job Code, Marcus Mileage, Susie Simple
FULL TIME EMPLOYEES	Smart group: Austin Accruals, Bethany Bulletin, Frank Forgetful, Gavin Groups, Josh Job Code, Marcus Mileage, Oscar Overtime, Paige PTO, Roberto Restaurant, Susie Simple, Talon Tugboat Mr.
HOURLY EMPLOYEES	List group: Austin Accruals, Josh Job Code, Paige PTO, Roberto Restaurant
JOB CODE (WR-502789)	List group: Austin Accruals, Josh Job Code, Paige PTO

[Add New Group](#)

(Illustration 1.3)

Step 2. Make the necessary changes to the “Employee Group.” If making changes to the “Select by Criteria” filter you may need to delete existing filters in order to change or create a new filter (see illustration 1.4).

Maintenance Menu

Employee Groups Continued

Employee Group: Department 2 

Name of this group Department 2

Who can see this group?

- Everyone
- Just me

Who is in this group?

- All active employees
- All employees (including inactive)
- Specific employees
- Select by criteria

For each active employee, include if...

- Location = Main Street and [Delete](#)
- Home 1 = Bi-Weekly Payroll and [Delete](#)
- Department = DPT 200 AND [Delete](#)
- Home 1 = Full Time [Delete](#)

[Advanced Custom Selection Help](#)

Action

(Illustration 1.4)

Step 3. Once changes are made “Save” your changes. The “Employee Group” will now reflect the changes made.

Maintenance Menu

Employee Groups - Assign Multiple Supervisors through a List Group

One way of assigning multiple supervisors to an employee can be accomplished by creating a “List Group.” This is done from within the “Employee Groups” feature. Follow the steps below to create one or more “List Groups.”

Step 1. From the home page, go to the “Maintenance Menu” and click on “Employee Groups.” Then click “Add New Group.”

Step 2. Enter the name of the supervisor in the “Name of this group” field.

Step 3. Determine “Who can see this group?”

Step 4. Decide “Who is in this group?” by selecting “Specific employees.” Then check the box next to the names of the employees to be added to this supervisor’s “List Group.”

Step 5. Click “Save.”

Employee Group: Supervisor One

Name of this group	<input type="text" value="Supervisor One"/>
Who can see this group?	<input type="radio"/> Everyone <input checked="" type="radio"/> Just me
Who is in this group?	<input type="radio"/> No employees <input type="radio"/> All active employees <input type="radio"/> All employees (including inactive) <input checked="" type="radio"/> Specific employees from within Active Employees Check All Uncheck All <input checked="" type="checkbox"/> Apple, Austin <input checked="" type="checkbox"/> Doe, Jane <input checked="" type="checkbox"/> Harmless, Haylee <input checked="" type="checkbox"/> PTO, Paige <input type="checkbox"/> Darts, Darcy <input type="checkbox"/> Forgetful, Frank <input type="checkbox"/> Pears, Pitta <input type="checkbox"/> Simple, Susie <input type="radio"/> Select by criteria
Action	<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/>

Step 6. Steps two through five can be repeated several times with employees assigned to more than one of these “List Groups.” See examples below.

Group Name	Employees in group
Supervisor One	List group: Austin Apple, Jane Doe, Haylee Harmless, Paige PTO
Supervisor Three	List group: Jane Doe, Haylee Harmless, Pitta Pears, Paige PTO, Susie Simple
Supervisor Two	List group: Austin Apple, Jane Doe, Pitta Pears, Susie Simple
Add New Group	

Maintenance Menu

Employee Groups - Assign Multiple Supervisors through a Smart Group

A “Smart Group” is one way to assign multiple supervisors to an employee. This is done from within the “Employee Groups” feature. An example would be setting up a “Smart Group” for any employees who have “Supervisor One” or “Supervisor Four” in the “Supervisor” field on the “Employee Setup.” See example below.

Step 1. Select the “Maintenance Menu” from the left pane, and click on “Employee Groups,” then click “Add New Group.”

Step 2. Enter the name of the supervisor in the “Name of this group” field.

Step 3. Determine “Who can see this group?”

Step 4. Decide “Who is in this group?” by selecting “Select by criteria.”

New Employee Group	
Name of this group	<input type="text" value="Supervisor One & Four"/>
Who can see this group?	<input checked="" type="radio"/> Everyone <input type="radio"/> Just me
Who is in this group?	<input type="radio"/> All active employees <input type="radio"/> All employees (including inactive) <input type="radio"/> Specific employees <input checked="" type="radio"/> Select by criteria For each <input type="text" value="employee"/> , include if... <input type="text" value="Supervisor"/> <input type="text" value="contains"/> <input type="text" value="Supervisor One"/> <input type="text" value="..."/> Advanced Custom Selection Help
Action	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Step 4a. The first dropdown asks which employees to include in the search. The dropdown field defaults to “employee;” however, you have the option to select “active employee” or “inactive employee.”

Step 4b. The next dropdown asks what information you want to filter by from the “Employee Setup” page. For this example select “Supervisor.”

Step 4c. The next dropdown defaults to “=” change this to “Contains.” (When “Contains” is selected, this will prompt the system to look for a specific supervisor name in the “Employee Setup” page, even if more than one supervisor name is listed.) See the example of supervisors in “Employee Setup” directly below.

Maintenance Menu

Employee Groups - Assign Multiple Supervisors/Smart Group Continued

✓	Employee Name (add new)	Supervisor
<input type="checkbox"/>	Apple, Austin	Supervisor Two
<input type="checkbox"/>	Darts, Darcy	Supervisor One, Supervisor Three
<input type="checkbox"/>	Doe, Jane	Supervisor Three
<input type="checkbox"/>	Forgetful, Frank	Supervisor One, Supervisor Three, Supervisor Four
<input type="checkbox"/>	Harmless, Haylee	Supervisor Two
<input type="checkbox"/>	Pears, Pitta	Supervisor One, Supervisor Three
<input type="checkbox"/>	PTO, Paige	Supervisor Two
<input type="checkbox"/>	Simple, Susie	Supervisor Three

Step 4d. In the next field enter the supervisors name exactly as it is entered in “Employee Setup.”

Step 4e. Click the “Advanced” button, for more options, and select the lower case “or.” Note: The lower case “and”/ “or” determine the order of operations. Click “Advanced Custom Selection Help” for further details.

Step 4f. Enter the next supervisor’s name. Continue this step until all supervisors have been assigned to the Smart Group.

Who is in this group?	<input type="radio"/> All active employees
	<input type="radio"/> All employees (including inactive)
	<input type="radio"/> Specific employees
	<input checked="" type="radio"/> Select by criteria
	For each <input type="text" value="employee"/> , include if...
	Supervisor contains Supervisor One or Delete
	<input type="text" value="Supervisor"/> contains <input type="text" value="Supervisor Three"/>
	<input type="text" value="..."/>
	Advanced Custom Selection Help
Action	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Step 5. Click “Save.”

Maintenance Menu

Finalize Pay Period

Finalizing a pay period will set the period to a “Finalized” status and the data can no longer be changed in the time cards. However, if necessary, a pay period may be “un-finalized” by your timekeeping provider or by you if authorized to do so. Additionally, your service provider will have access to view if your pay period is finalized and ready to initiate payroll processing.

Steps to Finalize a Pay Period:

Step 1. Click on the “Maintenance Menu” to open the list of options. Then select Finalize Pay Period.

Step 2. Under “Finalization Status”, check to verify the correct pay period is displayed if not, you may need to “Finalize” a previous pay period to continue.

Step 3. Under the Action bar click “Finalize (Current Pay Period).”

Step 4. Click on the Submit button and the pay period is now finalized.

Finalize Pay Period

About Finalization

Finalizing a pay period will ensure your pay period's timekeeping data is in sync with payroll. Additionally, your Payroll Service Bureau has access to view if your pay period is finalized to initiate payroll processing.:

When a pay period is finalized, the following occurs:

- Time cards are no longer able to be edited for the period.
- A copy of the data for the finalized period is created for payroll purposes.
- Finally, if "Accruals" are being tracked in the timekeeping system (optional), the balances are carried to the next period.

Note: To make changes for a finalized pay period, the period must first be “un-finalized.” To un-finalize the most recent finalized pay period, select the un-finalize option below and click “Submit”. Please note you can only un-finalize the last finalized period. As an additional control, your payroll service provider has the ability to prevent you from un-finalizing the most recent period. If this feature has been activated, the un-finalize option will not be available. In this event, please contact your service provider to un-finalize the period.

Finalization Status

The pay period from Tuesday, January 1, 2013 through Tuesday, January 15, 2013 has ended but has not yet been finalized.

Action

Finalize (current pay period)

Maintenance Menu

Un-Finalize Pay Period

Step 1. Click on the “Maintenance Menu” to open its list of options. Then select “Finalize Pay Period.”

Step 2. Select “Unfinalize” (should be for the most recent finalized pay period).

Step 3. If the pay period has been “Accepted” no changes can be made. To “Unfinalize” the accepted pay period, contact your timekeeping service provider.

Step 4. Click “Submit.”

Step 5. The period should now be un-finalized and available to be edited or changed as needed. Note: Only the prior finalized pay period can be un-finalized.

Finalization Status
The prior pay period (Tuesday, January 1, 2013 through Tuesday, January 15, 2013) has already been finalized, but has not yet been accepted for processing. You may unfinalize it if you need to make changes. The current pay period is almost over and can be finalized early if all information is in the system and if no further punches are expected from clocks.
Action
<input type="radio"/> Finalize (current pay period) <input type="radio"/> Unfinalize (prior pay period)
<input type="button" value="Submit"/>



Maintenance Menu

Manage Clock Prompts

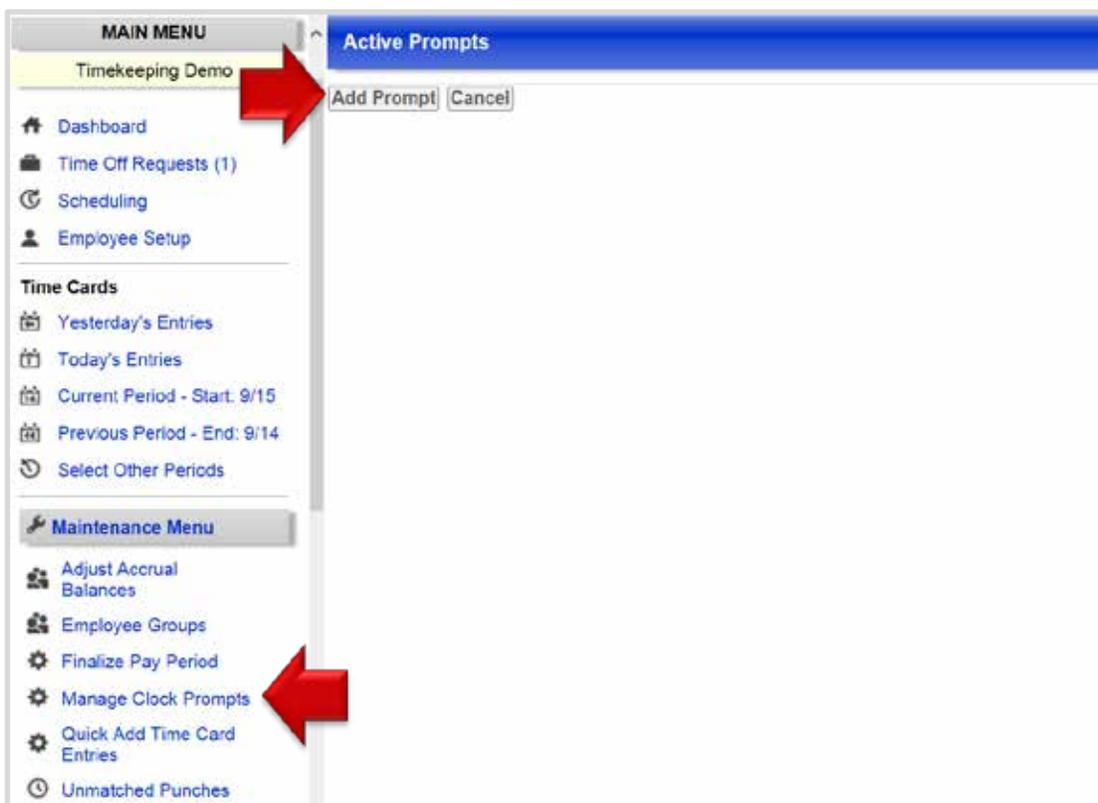
Clock prompts are questions that a time clock or WebClock asks an employee at the punch-IN or punch-OUT time. These prompts can be set to collect labor or numerical data which can be used for reporting.

There are two types of prompts available, Numeric and Labor Code. Numeric prompts are typically used for gathering earning amounts such as tips, mileage, piece pay, etc. Labor Code prompts are used to gather data for reporting on department, location, job code, etc.

Follow the steps below to set up a Numeric and a Labor Code Prompt.

Step 1. From the “Maintenance Menu” select the “Manage Clock Prompts” link.

Note: If you do not see the “Manage Clock Prompts” link, contact your timekeeping provider.



Step 2. Click on the “Add Prompt” button.

Step 3. To set up a numeric prompt select one of the three available prompts: I, J, or K.

Note: For a description of the available prompts, hover your mouse over “Prompt Assignments.” Click the dropdown to make your selection.

- **Prompt Assignment:** In this dropdown menu you have a list of available prompts to select from. Once a specific prompt has been used, it will be removed from the list. For example, if you set up Prompt K, it will be removed from the list.

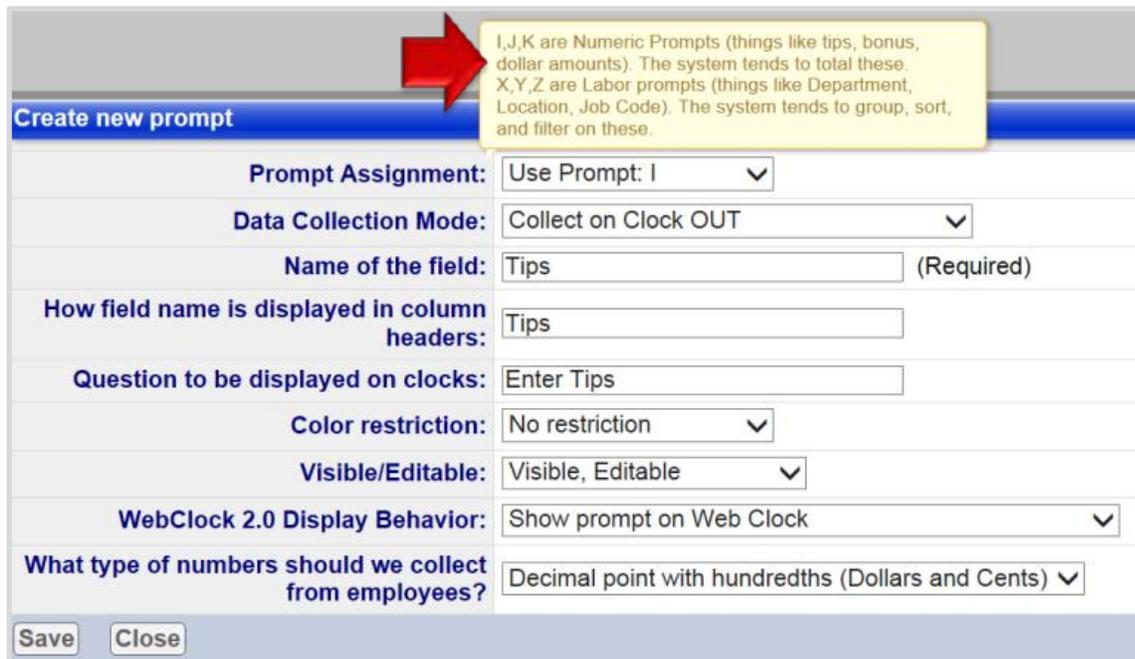
Maintenance Menu

Manage Clock Prompts Continued

- **Data Selection Mode:** You have three options to collect data including “Collect on Clock IN,” “Collect on Clock OUT,” and “Show online, but do not collect anything.”
- **Name of the field:** This allows you to name the prompt for use on the time card, and reports.
- **How field name is displayed in column headers:** Enter the name for what the column header should be on the time card.
- **Question to be displayed on clocks:** Enter the question to be displayed while an employee is clocking IN or OUT. In this example “Enter Dept” is used.
- **Color restriction:** This is used for time cards with a specific color such as red, blue or green.

Note: The time cards can be encoded for specific clock prompting purposes. For example, if we want only a specific group of employees to be prompted, we can select the blue card option so that only people with blue cards will be prompted. This setting only affects the prompt on the physical clock terminal. All employees will be prompted on WebClock because no cards are used.

- **Visible/Editable:** Select from three options to choose how the punches collected will be editable and visible on the time card.
- **Web Clock 2.0 Display Behavior:** Decide if the prompt should prompt you while using the WebClock.
- **What type of numbers should we collect from employees?:** Select numbers displayed and collected as “Whole numbers only, no decimals,” or “Decimal point with hundredths (Dollars and Cents).”



The screenshot shows the 'Create new prompt' form. A red arrow points to the 'Prompt Assignment' dropdown menu, which is currently set to 'Use Prompt: I'. A yellow callout box explains that I, J, K are Numeric Prompts (things like tips, bonus, dollar amounts) and X, Y, Z are Labor prompts (things like Department, Location, Job Code). The system tends to total these. The form includes the following fields:

- Prompt Assignment:** Use Prompt: I
- Data Collection Mode:** Collect on Clock OUT
- Name of the field:** Tips (Required)
- How field name is displayed in column headers:** Tips
- Question to be displayed on clocks:** Enter Tips
- Color restriction:** No restriction
- Visible/Editable:** Visible, Editable
- WebClock 2.0 Display Behavior:** Show prompt on Web Clock
- What type of numbers should we collect from employees?:** Decimal point with hundredths (Dollars and Cents)

Buttons for 'Save' and 'Close' are located at the bottom left of the form.

Step 4. Click “Save” when done.

Step 5. To set up a labor prompt select one of the three available prompts X, Y, or Z.

- **Prompt Assignment:** This dropdown menu provides a list of available prompts to select from. Once a specific prompt has been used, it will be removed from the list. For example, if you set up Prompt K, it will be removed from the list.

Maintenance Menu

Manage Clock Prompts Continued

- **Data Collection Mode:** Choose from three options to collect data including “Collect on Clock IN,” “Collect on Clock OUT” and “Show online, but do not collect anything.”
- **Name of the field:** Name the prompt for use on the time card, and reports.
- **How field name is displayed in column headers:** Enter the name for what the column header should be on the time card.
- **Question to be displayed on clocks:** Enter a question to be displayed while an employee is clocking IN or OUT. In this example “Enter Tips” is used.
- **Visible/Editable:** Here you have three options to choose how the punches collected will be editable and visible on the time card.
- **WebClock 2.0 Display Behavior:** Decide if the prompt should or should not prompt you, or display as a dropdown selection while using the WebClock.
- **What should happen if the employee doesn’t enter anything for the clock prompt:** You have two options to select from. “Allow it” or “Don’t allow it, force them to enter something.”

Note: Additional options such as the employee’s home department, location, or supervisor are available for selection through scripting. Contact your timekeeping provider to discuss this option as fees may apply.

- **Length of Entry:** This determines the amount of characters which can be used to name the prompt.
- **Prompt List:** A list of entries can be entered which will restrict the employee from entering something other than what is on the list, or give them a selection to choose from if dropdown was selected in “WebClock 2.0 Display Behavior.”

Note: Leave this field blank to have employees key in an entry. You can have up to 32,000 characters in this field.

- **Type of Entry:** This gives you two options to select whether the prompt list entries are “Numeric” or “Alphanumeric.”

The screenshot shows a 'Create new prompt' dialog box with the following fields and values:

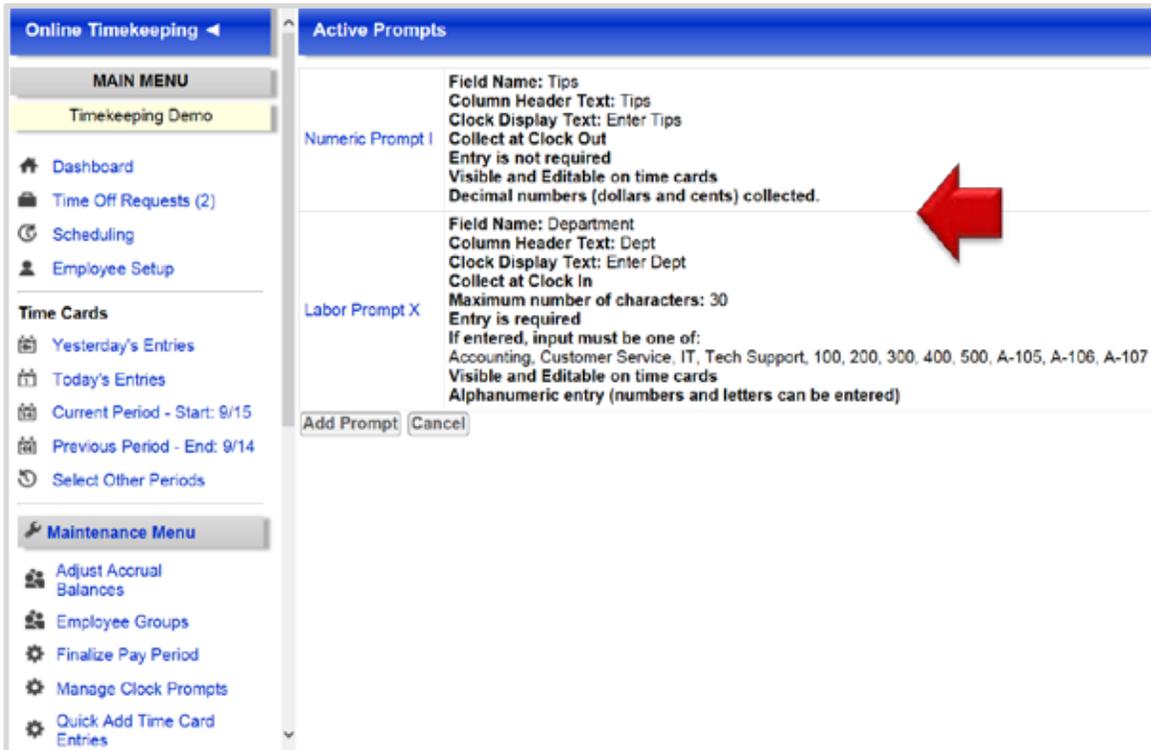
- Prompt Assignment:** Use Prompt: X
- Data Collection Mode:** Collect on Clock IN
- Name of the field:** Department (Required)
- How field name is displayed in column headers:** Dept
- Question to be displayed on clocks:** Enter Dept
- Color restriction:** No restriction
- Visible/Editable:** Visible, Editable
- WebClock 2.0 Display Behavior:** Display prompt on Web Clock as drop-down selection
- What should happen if the employee doesn't enter anything for the clock prompt?:** Don't allow it, force them to enter something
- Length of Entry:** Minimum: 0, Maximum: 30 (50 max)
- Prompt List:** Accounting, Customer Service, IT, Tech Support, 100, 200, 300, 400, 500, A-105, A-106, A-107 (92 characters)
- Type of Entry:** Alphanumeric

Buttons: Save, Close

Maintenance Menu

Manage Clock Prompts Continued

Step 6. Click “Save” when done. You should now see both prompts listed on the “Manage Clock Prompts” page.



Note: To make changes to a prompt, or to delete a prompt, click on the prompt. You can then make your edits and save, or delete the prompt.

Maintenance Menu

Quick Add Time Card Entry

The Quick Add Time Card Entries page allows you to add the same type of entry to multiple employee time cards at once. This is most commonly used for adding Holiday hours and/or Bonus dollar amounts. You can select all employees, specific employees, employees from a specific group or by certain criteria. This feature is a great time saver and allows you to have control over the hours/dollars applied.

Quick Add Batch of Entries To Time Cards	
This screen is used for adding the same entry to multiple time cards, such as hours worked, holiday pay, and bonuses.	
Add entries to which employees?	<input checked="" type="radio"/> All active employees <input type="radio"/> Specific employees <input type="radio"/> All active employees in group <input type="radio"/> Select by criteria
Add entries for what date?	<input type="text"/>
Add what kind of entry?	Regular <input type="button" value="v"/>
Hours to add	<input type="text"/>
Optional edit comments	<input type="text"/>
<input type="button" value="Submit"/>	

Maintenance Menu

Unmatched Punches

Unmatched Punches are punches that were received from a clock but cannot be matched to any employee. These punches typically belong to new hires and their punches will automatically be matched as soon as their information has been added to the timekeeping system. Otherwise, the punches may have come from miss keyed data. If this is the case, they can be matched and reprocessed through here.

Unmatched Punches

The following are punches received that could not be matched to any employee. If these punches belong to new-hires, the punches will automatically be matched as soon as the new-hires have been entered into the system.

Select For Deletion	Number	In/Out	Punch Date/Time	Source
<input type="checkbox"/> Select All	-	-	-	-
<input type="checkbox"/>	2576	In	1/4/2013 7:56:28 AM	Clock 749801470096

Delete Selected

Reports Menu

Select by Criteria

“Select by criteria” is a search tool which gives the ability to refine your search or create multiple comparisons when searching for specific employees. This search tool can be found on many of the reports, as well as options “Adjust Accrual Balances,” “Employee Groups,” “Quick Add Time Card Entries,” and “Login Maintenance.”

In the example below, the “Select by Criteria” is set to search for any employee who has department 100 set in the “Department” field in their “Employee Setup” profile.

All active employees
 All employees (including inactive)
 Specific employees
 Select by criteria

For each , include if...

=

To broaden or expand your search, click on the “Advanced” button.

All active employees
 All employees (including inactive)
 Specific employees
 Select by criteria

For each , include if...

=

[Advanced Custom Selection Help](#)

For help in using the “Advanced” search tool, click on “Advanced Custom Selection Help” located directly below the “Advanced” button.

All active employees
 All employees (including inactive)
 Specific employees
 Select by criteria

For each , include if...

=

[Advanced Custom Selection Help](#)

Reports Menu

Select by Criteria Continued

Advanced

Advanced Custom Selection Help 

You can combine multiple comparisons with AND and OR. You have a choice of capital AND/OR, and lowercase and/or. They work exactly the same, except when and/or are both combined. The lowercase ones tell the system which comparisons to consider together (as illustrated by underlining).

Consider: Location=4 **AND** Department=1 or Department=2 or Department=3

Using a lowercase "or" between the department choices ensures that the department choices are evaluated together as a group before considering Location=4. Someone must be in Location 4 regardless of their department in order to be included.

Compare to: Location=4 and Department=1 **OR** Department=2 **OR** Department=3

In this example, Location=4 and Department=1 are considered together. The comparisons for Department=2 and Department=3 are completely separate. Someone in departments 2 or 3 will be included regardless of their location.

Filters are not case sensitive.

Save

Cancel

Reports Menu

Accruals Report

The Accruals Report gives you the ability to view balances of employee accrued earnings such as Paid Time off (PTO), Sick Time, or Vacation. This report tracks and manages accrual balances of employee(s).

Step 1. To run the “Accruals Report,” select “Reports Menu” from the left pane.

Step 2. Click “Accruals Report.”

Step 3. Decide which employees to include.

Step 4. Select “Balance” or “Accrual Ledger/Detail Report,” which gives a detailed report of balances adjusted, earned and used.

Step 5. Select “Balance(s) to include.” In the example below there are three options; however, depending on your accrual policy you may have one or more to select from.

Step 6. Click “Run Report.”

Accruals Report	
Employees to include	<input checked="" type="radio"/> All active employees <input type="radio"/> Specific employees <input type="radio"/> All active employees in group <input type="radio"/> Select by criteria
Type of report	<input checked="" type="radio"/> Balance <input type="radio"/> Accrual Ledger/Detail Report
Show balances as of	<input type="text" value="10/19/2013"/>
Balances to include	<input type="checkbox"/> PTO <input checked="" type="checkbox"/> Sick <input type="checkbox"/> Vacation
<input type="button" value="Run Report"/>	

Step 7. You have three options: “Print,” “Export to CSV,” or to view the report online.

Reports Menu

Accruals Report - Continued

Example of a "Balance Report:"

Maintenance Menu

Reports Menu

- Accruals Report
- Approvals Report
- Audit Log Report
- Detail Report
- Labor Report
- Punch Notes Report
- Summary Report
- Time Off Request Report

Available Accrual Balances as of Saturday, October 19, 2013

Print Export to CSV

All balances are as of the end of the listed reporting date.

Name	Sick
Accruals, Austin	24.00
Forgetful, Frank	8.00
Groups, Gavin	20.00
Job Code, Josh	12.00
Restaurant, Roberto	20.00
Simple, Susie	16.00
Totals	100.00

Example of an "Accrual Ledger/Detail Report:"

Online Timekeeping

Accruals Report as of Wednesday, October 23, 2013

Print Export to CSV

All balances are as of the end of the listed reporting date.

Accruals, Austin	Sick
10/9/2013	24.00
10/19/2013	24.00
Forgetful, Frank	Sick
10/9/2013	8.00
10/19/2013	8.00
Groups, Gavin	Sick
10/9/2013	20.00
10/19/2013	20.00
Job Code, Josh	Sick
10/9/2013	12.00
10/19/2013	12.00
Restaurant, Roberto	Sick
10/9/2013	20.00
10/19/2013	20.00
Simple, Susie	Sick
10/9/2013	16.00
10/19/2013	16.00

MAIN MENU

Timekeeping Demo

- Dashboard
- Time Off Requests (0)
- Scheduling
- Employee Setup

Time Cards

- Yesterday's Entries
- Today's Entries
- Current Period - Start: 10/20
- Previous Period - End: 10/19
- Select Other Periods

Maintenance Menu

Reports Menu

- Accruals Report

Reports Menu

Approvals Report

The Approvals Report allows you to quickly view which employee timecards have been approved and by whom. You are also able to see missing punches and total hours for the pay period. Clicking an employee's name will act as a quick link to their time card.

The screenshot shows a web application window titled "Approvals Report". At the top right, it displays "G & O" and the date range "12/1/2012 thru 12/15/2012". Below the title bar, there is a "Show Approved" button. A summary section contains the following text: "13 employees are active this pay period. 13 of them have NOT approved their own time card. 11 supervisors are active this pay period. 11 of them have NOT approved time for 13 employees. Management has NOT approved the time cards." Below this is a table with the following columns: "Name", "Approval (Employee / Supervisor / Manager)", "Missing Punches", and "Hours". The table lists several employees and their approval status.

Name	Approval (Employee / Supervisor / Manager)	Missing Punches	Hours
Training (Jod)			
ALVARNAS, ANDREA	Not Approved / Not Approved / Not Approved	0	0.00
HS HK (ann)			
George, Tarneshia	Not Approved / Not Approved / Not Approved	0	0.00
Music (Bubbles)			
Jackson, Michael	Not Approved / Not Approved / Approved	12	12.04
AC ST ()			
Jones, Christina	Not Approved / Not Approved / Not Approved	0	0.00
LA LW ()			
Jones, Dorothy	Not Approved / Not Approved / Not Approved	0	0.00
NS NA ()			

Note: To have the Approvals feature available, contact your provider. Additional fees may apply.

Reports Menu

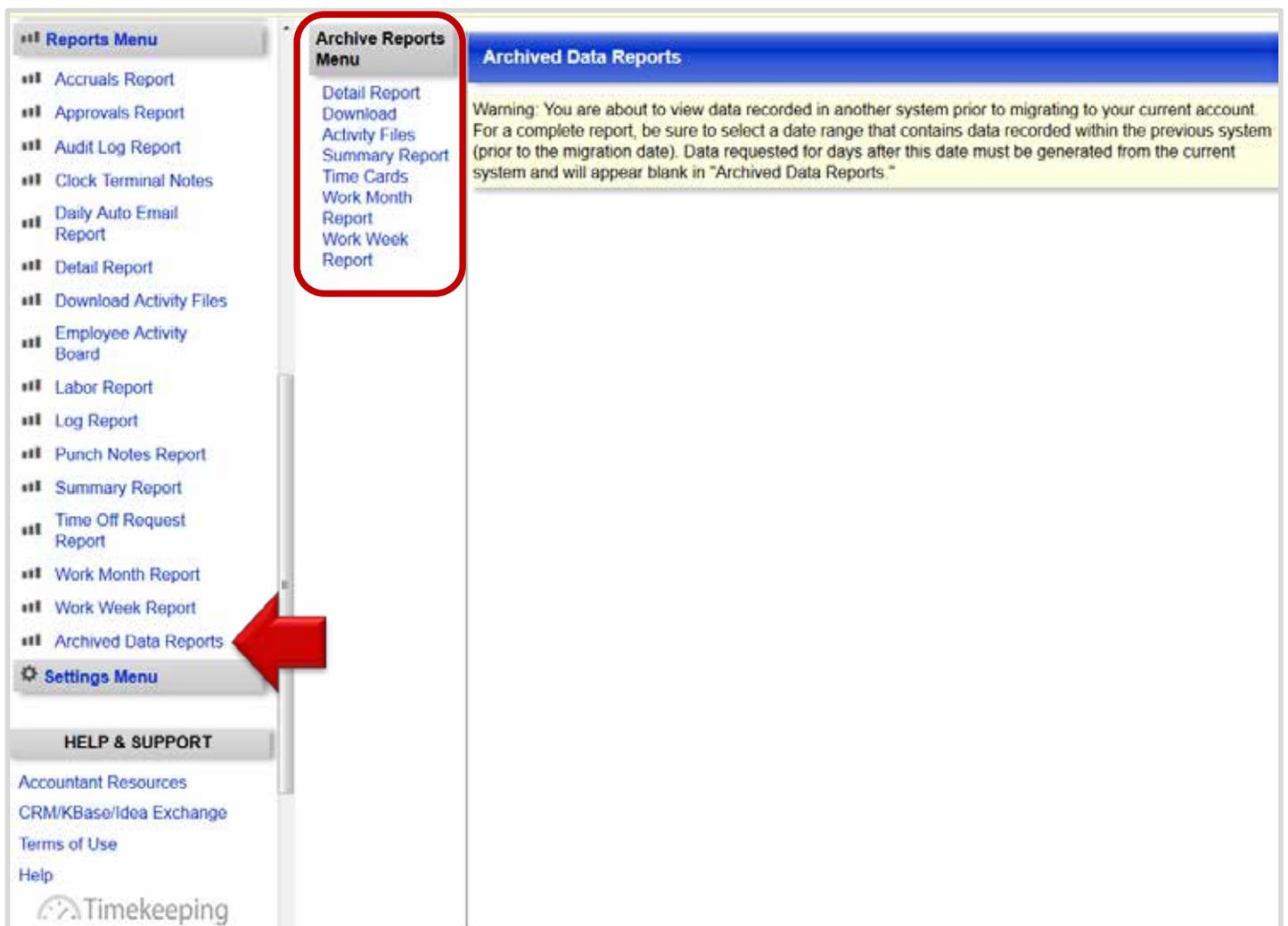
Archived Data Report

The “Archived Data Reports” area provides access to selected reports found in the classic timekeeping system. The reports display system data collected prior to migrating to the Glue timekeeping system, and are valuable for reporting purposes.

Step 1. From the home page select the “Reports Menu.”

Step 2. Select the “Archived Data Reports.”

Step 3. Click on any of the reports displayed in the right pane to access the historical data.



Reports Menu

Audit Log Report

The Audit Log Report will display any changes made to the employee's time cards. This report also tracks all edits, deletions, and approvals made on the time card from an employee, supervisor, manager, or timekeeping provider.

Step 1. To run the "Audit Log" report, select "Reports Menu" from the left pane.

Step 2. Click "Audit Log Report."

Step 3. Select a "Pay Period" or enter a specific date range.

Step 4. Decide which employees to include.

Step 5. Click "Submit."

Maintenance Menu

Reports Menu

- Accruals Report
- Approvals Report
- Audit Log Report**
- Daily Auto Email Report
- Detail Report
- Download Activity Files
- Employee Activity Board
- Labor Report
- Punch Notes Report
- Summary Report
- Time Off Request Report
- Work Week Report

Settings Menu

Audit Log Report

Pay Period

- 5/16/13 thru 5/31/13 (current)
- 5/1/13 thru 5/15/13 (prior)
- 4/16/13 thru 4/30/13
- 4/1/13 thru 4/15/13
- 3/16/13 thru 3/31/13
- 3/1/13 thru 3/15/13
- 2/16/13 thru 2/28/13
- 2/1/13 thru 2/15/13

More pay periods...

Enter range: thru

Include which employees?

- All active employees
- Specific employees
- All active employees in group
- Select by criteria

Submit

Reports Menu

Audit Log Report Continued

Step 6. Select from one of the following three options to “Filter By,” or select all.

- Edit: All edits made on an employee’s time card.
- Delete: Any deletion of information on an employee’s time card.
- Approval: All approvals made by the employee, supervisor or manager. **Note:** The “Approvals” rule must be active for the information to be displayed.

Audit Log Report		
Employee	Reason	Source
Forgetful, Frank		Clock GREEN ST (901404484)
Mileage, Millie		Clock STATE ST (901317766)
PTO, Paige	2013-05-13: Punch edited to 8 Sick hours	1. Susan Weight[sweight](192.168.121.116,[UTC 2013-01-14 23:36:58]) new record: CATEGORY=Sick; time: 8 hours
PTO, Paige	2013-05-14: Punch edited to 8 Sick hours	1. Susan Weight[sweight](192.168.121.116,[UTC 2013-01-14 23:37:05]) new record: CATEGORY=Sick; time: 8 hours

Reports Menu

Custom Reports

Custom Reports will help you get the data you need from your timekeeping system. Through the custom reports section you will be able to choose a date, the employees to include, and select any of the reports listed in the report section. Since the reports are basically a template of selected settings, the reports can be run again and again with different dates and employees. Follow the steps below.

Starting from the home page, click “Reports Menu” and select the “Custom Reports” link. Note: If the “Custom Reports” link is not available, contact your timekeeping provider to request this tool.

Step 1. Select a pay period from the drop down or enter a specific date range.

Step 2. Decide which employees to include in the report.

Step 3. Click on the report name to view the report.

> INSTRUCTIONS ?

Select a date for your report:

7/13/14 thru 7/19/14 (finalized) 1

All active employees

All employees (including inactive)

Specific employees

All employees in group(s) 2

DPT 300

Select by criteria

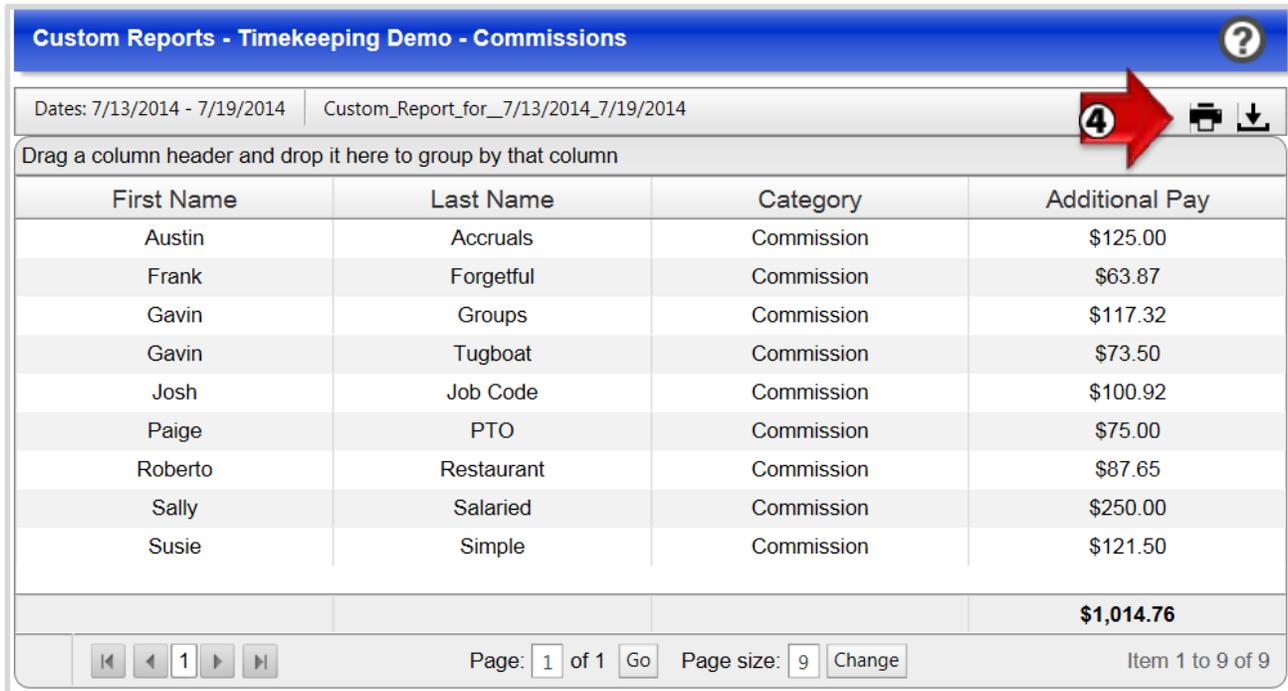
Click report's title to run a report:

Title	Description	Owner	Created	Updated
Email List	List of all employee emails.	TimekeepingDemo	7/24/2014	7/24/2014
Supervisor List	List of Employees and their Supervisor	WebinarC	7/8/2014	7/8/2014
<u>Commissions</u> 3	Commissions by Departments	TimekeepingDemo	7/24/2014	7/24/2014

Reports Menu

Custom Reports - Continued

Step 4. To print the report, click on the printer icon; located at the top right of the screen, or download the report as a CSV or PDF file.



Custom Reports - Timekeeping Demo - Commissions

Dates: 7/13/2014 - 7/19/2014 | Custom_Report_for_7/13/2014_7/19/2014

Drag a column header and drop it here to group by that column

First Name	Last Name	Category	Additional Pay
Austin	Accruals	Commission	\$125.00
Frank	Forgetful	Commission	\$63.87
Gavin	Groups	Commission	\$117.32
Gavin	Tugboat	Commission	\$73.50
Josh	Job Code	Commission	\$100.92
Paige	PTO	Commission	\$75.00
Roberto	Restaurant	Commission	\$87.65
Sally	Salaried	Commission	\$250.00
Susie	Simple	Commission	\$121.50
			\$1,014.76

Page: 1 of 1 Go Page size: 9 Change Item 1 to 9 of 9

The report also allows the following functionality:

- Columns may be moved around by clicking on the column header and dragging it to the desired location.
- Columns may be sorted by clicking the column header.
- Columns may be resized by hovering between the columns until the double ended arrow appears.
- Column headers may be used to group the columns by clicking the header name and dragging it directly above the header bar.
- Additional options such as filtering may be selected by right clicking on a column header.

Reports Menu

Custom Reports - Manage Custom Reports

The “Manage Custom Reports” feature gives those with client level logins the ability to write their own custom reports. As the creator of the report you will have the ability to modify or delete the reports you created. Permissions can be given to allow supervisor level logins the ability to view specific reports, based on their permissions.

Step 1. To access the “Manage Custom Reports” feature go to the “Reports Menu” and click on the link. (See illustration 1.1).

Note: If you do not see the “Manage Custom Reports” link, contact your timekeeping provider to request this tool.

Step 2. Click on “Modify” or “Delete” to make changes to a report. The “View” option will only allow you to view the report settings when you are not the “Owner” or creator of the report.

Step 3. To create a “Custom Report” click on the “Add New Report” button.

The screenshot displays the 'Custom Reports Manager' interface. On the left is a sidebar menu with sections: 'MAIN MENU' (Timekeeping Demo), 'Time Cards', and 'Maintenance Menu'. Under 'Reports Menu', 'Manage Custom Reports' is highlighted with a red arrow labeled '1'. The main content area shows a table of reports with columns: Title, Description, Owner, Created, Updated, and Settings. The table contains three rows: 'Email List', 'Supervisor List', and 'Commissions'. The 'Settings' column for each row contains buttons: 'Modify' and 'Delete' for 'Email List' and 'Commissions', and 'View' for 'Supervisor List'. A red box highlights these buttons, with a red arrow labeled '2' pointing to them. At the bottom of the table is an 'Add New Report' button, highlighted with a red arrow labeled '3'.

Title	Description	Owner	Created	Updated	Settings
Email List	List of all employee emails.	Timekeepir	7/24/2014	7/24/2014	Modify Delete
Supervisor List	List of Employees and their Supervisor.	WebinarC	7/8/2014	7/8/2014	View
Commissions	Commissions by Departments	Timekeepir	7/24/2014	7/24/2014	Modify Delete

(Illustration 1.1)

Reports Menu

Custom Reports - Manage Custom Reports Continued

Step 4. Enter the “Report Name” and “Report Description” to easily identify the report in the “Custom Reports” list. (See illustration 1.2).

Step 5. Select which fields from the “Employee Setup” page to include on the report.

Step 6. Choose the data to include from the employee time cards which may include “Clock Prompts” collected when the employee punches IN/OUT.

Step 7. Organize the selected columns by clicking and dragging the column in the order that works best for you.

Step 8. Select the Supervisor box to allow supervisors to access and view this report. Supervisors will only be able to view employees based on the employee visibility permissions they have been given.

Step 9. Click “Save.” You will then be redirected to “Custom Reports” where you will be able to access the reports created through “Manage Custom Reports.” (See illustration 1.3).

The screenshot shows the 'Custom Report Settings' form with the following elements and annotations:

- Report Name:** A text input field containing 'Sample', with a red arrow labeled '4' pointing to it.
- Report Description:** A text input field containing 'Sample Report', with a red arrow labeled '4' pointing to it.
- Employee Setup Data Fields:** A section titled '(Select fields to display)' with a red arrow labeled '5' pointing to it. It contains three columns of checkboxes:
 - Column 1: Department, Employee Code, Home 1, Last Name (checked), Middle Name, Options, Separation Date, Title.
 - Column 2: Designation, Export Block, Home 2, Last, First, Mobile Enabled, Phone, Start Date, Web Clock Enabled.
 - Column 3: E-mail, First Name (checked), Home 3, Location, Mobile Punch Enabled, Record Number, Supervisor (checked).
- Time Card Data:** A section titled '(Select fields to display)' with a red arrow labeled '6' pointing to it. It contains checkboxes for Hours (checked), Edited Punched, Category (checked), Additional Pay (checked), and Missing Punched. A 'Clock Prompts' sub-section contains checkboxes for Dept (checked) and Mileage (checked).
- Column Order:** A section titled '(Click and drag columns to change their order)' with a red arrow labeled '7' pointing to it. It shows a row of buttons: Last Name, First Name, Hours, Category, All (dropdown), Additional Pay, Mileage, Dept, Supervisor.
- Supervisor Access:** A section titled 'Supervisor Access' with a red arrow labeled '8' pointing to the checkbox 'Supervisor Level Logins can access this report'.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right, with a red arrow labeled '9' pointing to the 'Save' button.

(Illustration 1.2)

Reports Menu

Custom Reports - Manage Custom Reports Continued

Note: See the How-To for step by step instructions on how to use the “Custom Reports.”

The screenshot displays the 'Custom Reports' interface. On the left, the 'Reports Menu' is highlighted in the navigation pane. The main area shows a table of reports with the following data:

Title	Description	Owner	Created	Updated
Email List	List of all employee emails.	TimekeepingDemo	7/24/2014	7/24/2014
Sample	Sample Report	TimekeepingDemo	7/24/2014	7/24/2014
Supervisor List	List of Employees and their Supervisor	WebinarC	7/8/2014	7/8/2014
Commissions	Commissions by Departments	TimekeepingDemo	7/24/2014	7/24/2014

(Illustration 1.3)

Reports Menu

Daily Auto Email Report

With daily auto e-mail subscriptions, a report can be sent regularly to a specified e-mail address. The report can be run either for an entire company or for a specific department or location using the filtering feature.

Step 1. To receive your “Daily Auto Email Report” you will need to subscribe. You can set up a subscription by selecting the “Reports” Menu located on the left pane. From this “Reporting” menu, click the “Daily Auto Email Report” link to complete the subscription (see illustration).

Daily Auto Email Report

Listed below are all the people who are subscribed to the Daily Auto Email Report. This report is a summary of the activity that occurred during the pay period. The report breaks the activity down and groups it by Pay Period, Week, and Daily Activity.

Populate from existing login: If you select someone from this list, the report will automatically contain the employees that are visible to that login.

Employee Group Filter: Use the employee groups to set filters or to add extra filters for the employees that a given login can see. **The visible employees of the given login will take precedence over the employee group filter.**

Note: Clock Prompt information will not be included in the report if the login field is not populated.

Send or View a Report Now

Login:

Recipient Email:

Group Filter:

Date:

Daily Email Subscriptions: Emails listed below will receive a daily email with yesterday's punch activity and a summary of employee's hours in the current pay period. Requested Send Time 07:00

Actions	Login (optional)	Recipient Email	Employee Group Filter	Begin Date	Last Report Ran For Day	Status	Send Email Now
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Deactivate"/>	Marcus Manager	marcus@manager.com		October 02, 2013	November 11, 2013	Active	<input type="button" value="Send"/>
<input type="button" value="Save"/>	<input type="text"/>	<input type="text"/>	Employee Groups				

From the subscription screen, you may operate in several ways:

Populate from existing login: If you select someone from this list, the report will automatically contain the employees that are visible to that login.

Employee Group Filter: Use the employee groups to set filters or to add extra filters for the employees that a given login can see.

Note: The visible employees of the given login will take precedence over the employee group filter.

Reports Menu

Detail Report

The Detail Report displays time card information in a calendar grid format. It will show detailed information day by day including in/out times, total hours and information collected through active prompts. There are many ways to sort and filter, however this report does not display pay for hours worked or lunch minutes.

Find employees
Find Demo
Hello Demo

Maintenance Menu

Reports Menu

- Accruals Report
- Approvals Report
- Audit Log Report
- Daily Auto Email Report
- Detail Report**
- Download Activity Files
- Labor Report
- Punch Notes Report
- Summary Report

Payroll Detail

Blank, Barry () D:Laundry L:Main Street HOURLY COUNT TOTAL HRS 0.00	Sun 1/20	Mon 1/21	Tue 1/22	Wed 1/23	Thu 1/24	Fri 1/25	Sat 1/26
	Sun 1/27	Mon 1/28	Tue 1/29	Wed 1/30	Thu 1/31		
				Wed 1/16	Thu 1/17	Fri 1/18	Sat 1/19
Forgetful, Fr ank () D:200 L:Green Street HOURLY COUNT Regular 48.83 Overtime 5.05 TOTAL HRS 53.88	Sun 1/20	Mon 1/21	Tue 1/22 703a-426p ?-521p Regular HRS 9.39	Wed 1/23 637a-354p Regular HRS 9.28	Thu 1/24 703a-704a 704a-357p Regular HRS 8.89	Fri 1/25 701a-342p Regular HRS 8.69	Sat 1/26 656a-706a 706a-344p Regular HRS 8.80
	Sun 1/27	Mon 1/28	Tue 1/29 658a-348p Regular HRS 8.83	Wed 1/30 646a-___?	Thu 1/31		

Reports Menu

Download Activity Files

The “Download Activity Files” report is used to create and export timekeeping data out of the timekeeping system to upload into your payroll software. This should remove the need for manual data entry.

To access the “Download Activity Files”, select the “Reports Menu” found under the “Main Menu.” Next, follow steps 1 thru 7 to create the file you can upload into your payroll software.

Step 1. Select the “Pay Period”.

Step 2. Select “All Employees” or use the filter options to select specific employees.

Step 3. The “Additional Filtering” drop down field displays only if “Clock Prompts” are active in the system.

Step 4. To create the file, click the “Download” radio button. To view the file in a browser, click the “Show in Browser” radio button.

Step 5. Enter the custom file format code. If you don’t know the format code, contact your service provider.

Step 6. Click the “Submit” button.

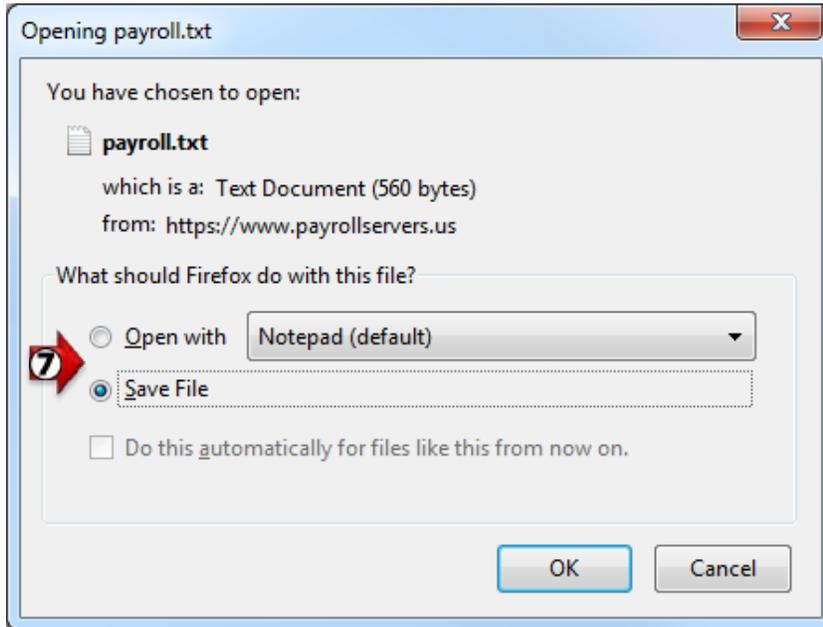
The screenshot shows the 'Download Activity Files' configuration page. On the left is a 'Maintenance Menu' with a 'Reports Menu' sub-menu. The 'Download Activity Files' option is highlighted with a red box. The main content area is titled 'Download Activity Files' and contains several sections:

- Pay Period:** A list of date ranges with radio buttons. A red arrow with the number '1' points to the '11/10/13 thru 11/16/13 (current)' option.
- Employees to include:** A list of employee selection options with radio buttons. A red arrow with the number '2' points to the 'All active employees' option.
- Additional Filtering:** A dropdown menu. A red arrow with the number '3' points to the dropdown.
- What to do with file:** Radio buttons for 'Download' and 'Show in browser'. A red arrow with the number '4' points to the 'Download' option.
- File format name:** A text input field. A red arrow with the number '5' points to the field.
- Click to proceed:** A 'Submit' button. A red arrow with the number '6' points to the button.

Reports Menu

Download Activity Files- Continued

Step 7. Once you click submit you will be directed to open, or save. To view the file, select “Open With”, and choose a format to view the file in. To save the file, select the “Save” option and save the file to your desktop, timekeeping folder, or someplace you can easily find when you are ready to upload the file to your payroll software.



Reports Menu

Employee Activity Board Report

The “Employee Activity Board” report is best used for an employer or supervisor to view the In/Out status of employees, at a glance, as well as their current job code, department, location, etc., collected by a prompt.

Step 1. To run the “Employee Activity Board” report, select “Reports Menu” from the left pane.

Step 2. Click “Employee Activity Board.”

Step 3. Select a “Labor Code to Include.” Labor codes will not populate if clock prompts are not active. Skip to the next step to view an employees’ clock In/Out status.

Step 4. Click “Go” to run the report.

The screenshot shows a software interface for the "Employee Activity Board" report. On the left is a "Reports Menu" sidebar with a list of report options. A red arrow with the number 1 points to the "Reports Menu" header. Another red arrow with the number 2 points to the "Employee Activity Board" option in the list. The main content area has a blue header "Employee Activity Board" and a yellow sub-header "Shows clock information about employees in near real time." Below this is a large grey area labeled "Labor Codes to include" with a red arrow and number 3 pointing to it. To the right of this area is a dropdown menu with "Department", "JobCode", and "Location" options; "Location" is selected and highlighted in blue. At the bottom of the main area is a "Go" button with a red arrow and number 4 pointing to it.

Reports Menu

Employee Activity Board Report- Continued

Notes:

Auto Refresh: The system will auto refresh the timekeeping data every few minutes to keep the report current. The “Last Update” box will show the last system refresh.

Column Sort: To change the order of any specific column, click the up/down arrows directly below the column header name.

Employee Activity Board

This page allows you to see in near real time the number of employee's who are clocked in to a selected labor code.

Last Update -----
Fri May 17 2013 -
11:07:23 AM

Location	# of Employees
Location B	1
Location C	1
Location A	2

Employee	Status	Last clock in	Location
Harmless, Haylee	in	5/17/2013 7:57:00 AM	Location A
Apple, Austin	in	5/17/2013 7:54:00 AM	Location B
Doe, Jane	in	5/17/2013 8:04:00 AM	Location C
Forgetful, Frank	in	5/17/2013 8:14:00 AM	Location A
Darts, Darcy	out	5/13/2013 12:30:00 PM	
Simple, Susie	out	5/17/2013 8:01:00 AM	

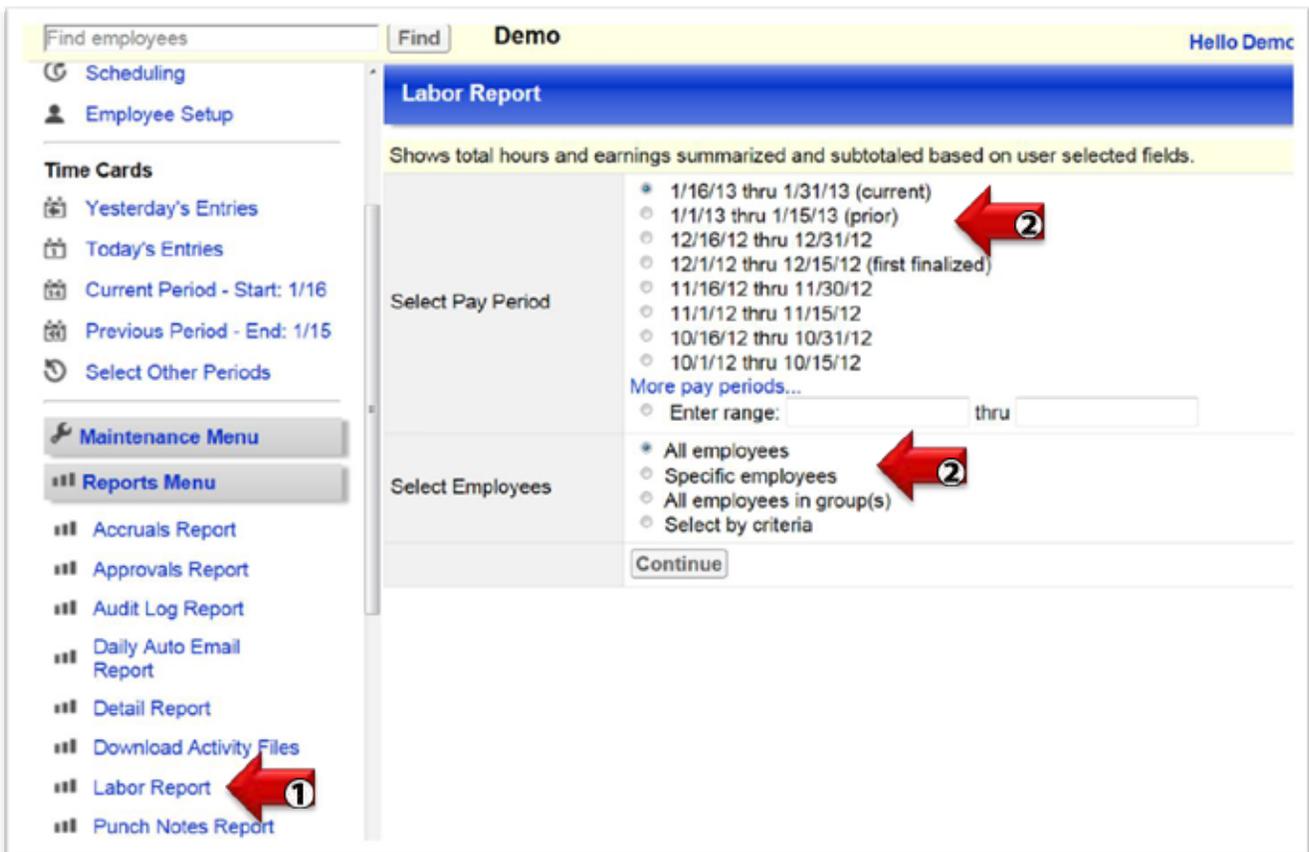
Reports Menu

Labor Report

The Labor Report is best used for tracking and reporting total labor hours and earnings per job, department, task, etc. This report is completely customizable, you will select ALL information you want displayed in the report. Sorting and filtering at the user's discretion makes this report a valuable addition to the timekeeping system.

Step 1. Select Reports found on the left pane. This is where the Labor Report can be found. Once you have selected the Labor Report, there are many configuration options available.

Step 2. Choose a specific date range and select the employees you want included in your report. Click Continue.



Step 3. You are able to drill down by picking the Value Fields which include Hours, Missing and Edited Punches, Wages, Numeric Prompts, etc.

Step 4. The Property Fields include Punch Information: Pay Categories, Labor Prompts and Pay Rates. Additional Employee Information can also be added to the report which is all data collected from the Employee Setup page.

Step 5. You can then re-arrange the Property Fields by the simple drag-and-drop method.

Reports Menu

Labor Report - Continued

Step 6. And lastly, you have the option to subtotal and/or determine what field you would like shown per Property Field. Your selection will turn blue and the Show All button will change to display the number of items you have selected.

Note: The filter will only display the activity that has been collected for the pay period selected.

Example: The available jobs are 100,200,300 but no employee worked in job 300 during the pay period; the property field Job would not display 300 as an option to filter by.

The screenshot shows a web interface for configuring a labor report. It is titled "Find Demo" and includes navigation links for "Hello Demo", "Home", "Help", and "Log Out".

The interface is divided into several sections:

- Select Employees:** Includes radio buttons for "All employees", "Specific employees", "All employees in group(s)", and "Select by criteria".
- Select Amounts (Value Fields):** Includes checkboxes for "Hours", "Tips", "Mileage", "Missing Punches", "Edited Punches", "Wage", and "Additional Pay". A red arrow labeled "3" points to this section.
- Select Additional Fields (Property Fields):** Includes expandable sections for "Additional Punch Information" and "Additional Employee Information". A red arrow labeled "4" points to this section.
- Select Breakdown & Filter Options (Selected Fields):** Includes dropdown menus for "DEPT", "Job", and "Category", each with "Subtotal" and "Show" options. Below these are "First Name" and "Last Name" fields, also with "Subtotal" and "Show" options. A red arrow labeled "5" points to the "Job" dropdown. A red arrow labeled "6" points to the "Show (3 items)" dropdown. A red arrow labeled "6" also points to the "Regular" option in the "Category" dropdown menu, which is highlighted in blue. A "Run Report" button is at the bottom.

Instructions within the interface include: "Click the items from each group that you want to see on the report. Each item you select will appear in the Selected Fields area below. (Click the arrows to expand and collapse the choices for each group.)" and "You can re-arrange these items by clicking on the item name and dragging, however the Value Fields must always come after the Property Fields. Choose the appropriate options for each item."

Note: All the options shown above are specific to the account's configuration. The reporting options will vary accordingly.

Reports Menu

Mobile & Web Access Report

The “Mobile and WebClock Access” report is a user friendly report that will save time in defining which employees have been given access to use WebClock, Mobile Access, and Mobile Punch. WebClock allows employees to clock in or out from a web browser. Mobile access allows employees to access the mobile app. Mobile punch gives supervisors and employee’s access to punch in or out.

To view the report, follow the steps below.

Step 1. Click on the “Report Menu” to open its list of options.

Step 2. Select the “Mobile and WebClock Access” report link.

Step 3. Click on the “Run” button to view the report data.

Step 4. To print the report, click on the printer icon; located at the top right of the screen, or select the download icon to export the report as a CSV or PDF file.

The screenshot shows the 'Mobile and Web Clock Access Report' interface. On the left, the 'Reports Menu' is expanded, and 'Mobile and Web Clock Access' is highlighted with a red box and a red arrow. The main area displays a table with the following data:

First Name	Last Name	Mobile Access	Mobile Punch	Web Clock
Austin	Accruals	No	No	Yes
Frank	Forgetful	No	No	Yes
Gavin	Groups	No	No	No
Josh	Job Code	No	No	Yes
Paige	PTO	No	No	Yes
Roberto	Restaurant	No	No	Yes
Sally	Salenec	No	No	No
Susie	Simple	Yes	Yes	Yes
Gavin	Tugboat	No	No	Yes

A red arrow points to the printer icon in the top right corner of the report area.

The report also allows the following functionality:

- Columns can be moved around by clicking on the column header and dragging it to the desired location.
- Columns can be sorted by clicking the column header.
- Columns can be resized by hovering between the columns until the double ended arrow appears.
- Column headers can be used to group the columns by clicking in the header name and dragging it directly above the header bar.
- Additional options such as filtering can be selected by right clicking on a column header.

Reports Menu

Punch Notes Report

The Punch Notes Report will display the notes added to the employee's time cards. As with the other available reports, you are able to select the date range and which employee's notes you would like to view. This report has been used for annual reviews and any other reason necessary.

Notes Report	
Show Punch Notes -- for a pay period or custom date range.	
Pay Period	<input type="radio"/> 1/1/13 thru 1/15/13 (current) <input type="radio"/> 12/16/12 thru 12/31/12 (prior) <input checked="" type="radio"/> 12/1/12 thru 12/15/12 <input type="radio"/> 11/16/12 thru 11/30/12 <input type="radio"/> 11/1/12 thru 11/15/12 <input type="radio"/> 10/16/12 thru 10/31/12 <input type="radio"/> 10/1/12 thru 10/15/12 <input type="radio"/> 9/16/12 thru 9/30/12 More pay periods... <input type="radio"/> Enter range: <input type="text"/> thru <input type="text"/>
Report Options	<input type="checkbox"/> Exclude Comments
Include which employees?	<input checked="" type="radio"/> All employees <input type="radio"/> Specific employees <input type="radio"/> All employees in group(s) <input type="radio"/> Select by criteria
<input type="button" value="Submit"/>	

Punch Notes Report	
#	Employees
1	Jones, Dorothy (Employee Code: 9583) 2012-12-04 Notes: Dorothy stayed 1/2 hour late to help with project XYZ.

Reports Menu

Time Card Audit Log Report

The “Time Card Audit Log” report will display an audit trail of all manual changes that have taken place on the employee time cards (excluding any actual punch activity). The report includes auto generated hours that have been applied automatically such as holiday or salary hours and also displays notes that have been made to the time card.

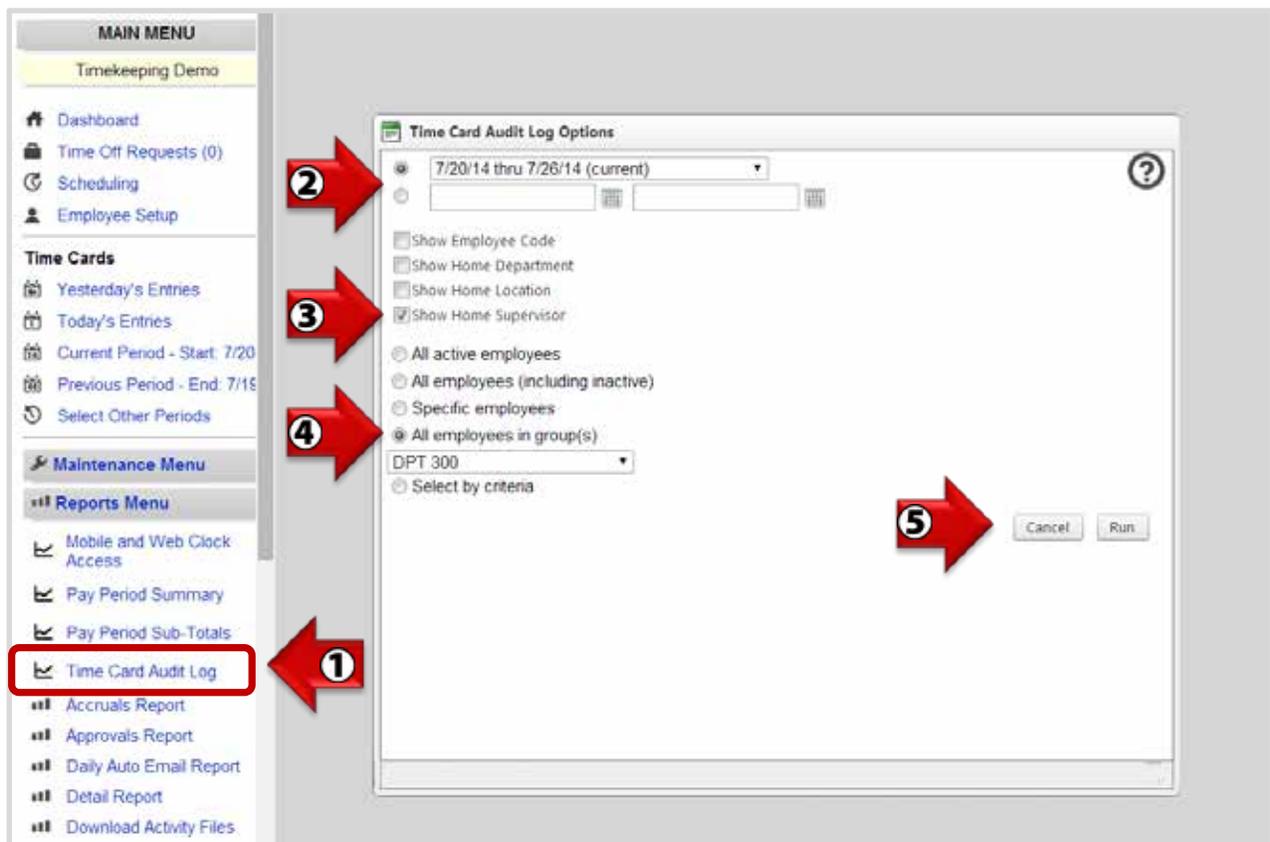
Step 1. To run the “Time Card Audit Log” report, select the “Reports Menu” and click on the “Time Card Audit Log” report link. (See illustration 1.1).

Step 2. Select a pay period from the drop down menu or enter a specific date range.

Step 3. Decide what options to show on the report. In the illustration below, “Show Home Supervisor” to include each employee’s home supervisor as entered in their “employee Setup” profile.

Step 4. Choose the employees to include on the report. In the illustration below, an “Employee Group” set up with employees in department 300 was selected.

Step 5. Click “Run” to view the report.



(Illustration 1.1)

Reports Menu

Time Card Audit Log Report- Continued

Step 6. Click on “Change Options” to change the date, employees selected, or fields to show from “Employee Setup.”

Step 7. Print or download the report as a CSV File or PDF File. (See illustration 1.2).

The report also allows the following functionality:

- Columns can be moved around by clicking on the column header and dragging it to the desired location.
- Columns can be sorted by clicking the column header.
- Columns can be resized by hovering between the columns until the double ended arrow appears.
- Column headers can be used to group the columns by clicking the header name and dragging it directly above the header bar.
- Additional options such as filtering can be selected by right clicking on a column header.

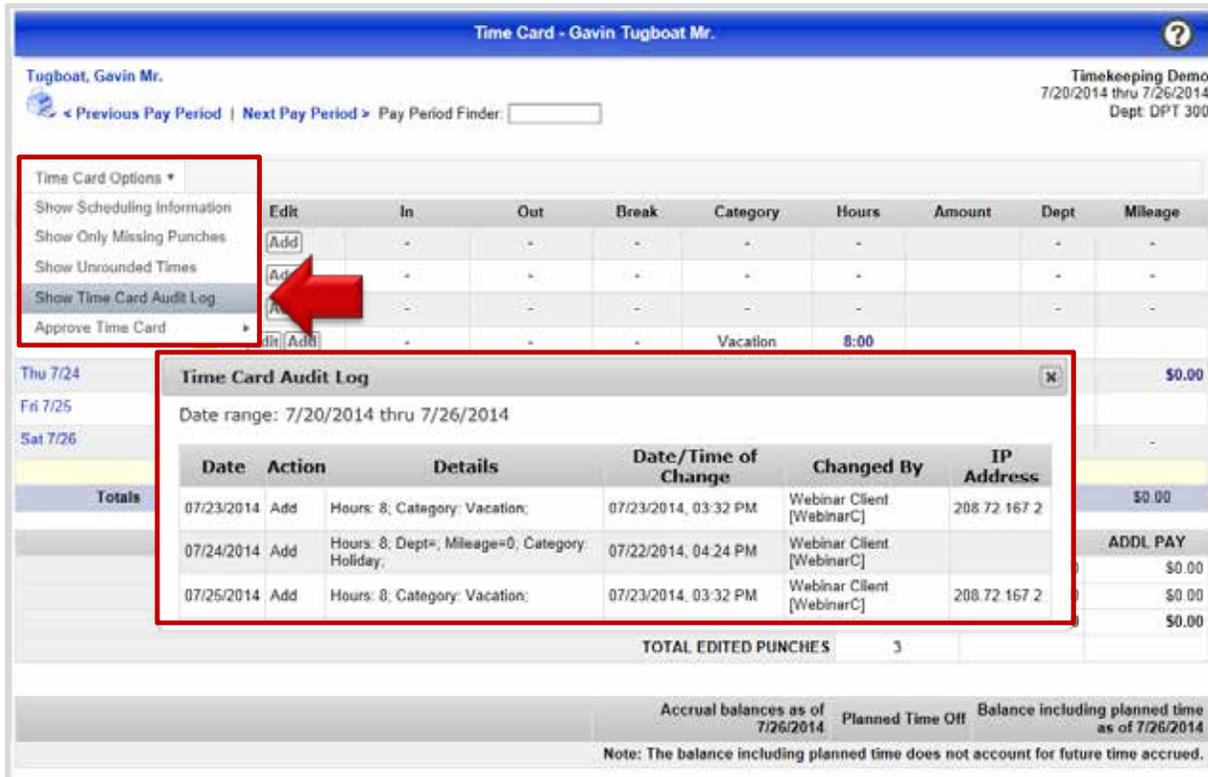
Dates: 7/20/2014 - 7/26/2014		Change Options	Time Card Audit Log						
Drag a column header and drop it here to group by that column									
Employee First	Employee Last	Supervisor	Date	Action	Details	Changed By	Date/Time of Change	IP Address	
Austin	Accruals	Susie Simple, Gavin Groups	07/24/2014	Add	Hours: 8; Dept=: Mileage=0; Category: Holiday;	Webinar Client [WebinarC]	07/22/2014, 04:24 PM		
Frank	Forgetful	Susie Simple	07/24/2014	Add	Hours: 8; Dept=: Mileage=0; Category: Holiday;	Webinar Client [WebinarC]	07/22/2014, 04:24 PM		
Gavin	Groups	Marcus Manager	07/21/2014	Add	Hours: 8; Category: Salary; Dept=DPT 500;	Auto Generated Line	04/08/2014, 10:16 AM		
Gavin	Groups	Marcus Manager	07/22/2014	Add	Hours: 8; Category: Salary; Dept=DPT 500;	Auto Generated Line	04/08/2014, 10:16 AM		
Gavin	Groups	Marcus Manager	07/23/2014	Add	Hours: 8; Category: Salary; Dept=DPT 500;	Auto Generated Line	04/08/2014, 10:16 AM		
Gavin	Groups	Marcus Manager	07/24/2014	Add	Hours: 8; Category: Salary; Dept=DPT 500;	Auto Generated Line	04/08/2014, 10:16 AM		
Gavin	Groups	Marcus Manager	07/25/2014	Add	Hours: 8; Category: Salary; Dept=DPT 500;	Auto Generated Line	04/08/2014, 10:16 AM		
Gavin	Groups	Marcus Manager	07/24/2014	Add	Hours: 8; Dept=: Mileage=0; Category: Holiday;	Webinar Client [WebinarC]	07/22/2014, 04:24 PM		
Gavin	Groups	Marcus Manager	07/24/2014	Delete	Deleted	Marcus Manager [MarcusManag	07/23/2014, 03:16 PM	208.72.167.2	
Josh	Job Code	Gavin Groups	07/24/2014	Add	Hours: 8; Dept=: Mileage=0; Category: Holiday;	Webinar Client [WebinarC]	07/22/2014, 04:24 PM		
Paige	PTO	Susie Simple, Gavin Groups	07/24/2014	Add	Hours: 8; Dept=: Mileage=0; Category: Holiday;	Webinar Client [WebinarC]	07/22/2014, 04:24 PM		
Paige	PTO	Susie Simple, Gavin Groups	07/20/2014	Approval	Employee	1005	09/12/2013, 02:19 PM	50.73.45.241	
Paige	PTO	Susie Simple, Gavin Groups	07/21/2014	Approval	Employee	1005	09/12/2013, 02:19 PM	50.73.45.241	
Paige	PTO	Susie Simple, Gavin Groups	07/22/2014	Approval	Employee	1005	09/12/2013, 02:19 PM	50.73.45.241	

(Illustration 1.2)

Reports Menu

Time Card Audit Log Report- Continued

Note: The “Time Card Audit Log” can also be viewed from the employees’ individual time cards by selecting “Show Time Card Audit Log” from the “Time Card Options” drop down menu. This view will only display audits related to the selected employee’s time card. (See illustration 1.3).



Time Card - Gavin Tugboat Mr.

Tugboat, Gavin Mr. Timekeeping Demo
7/20/2014 thru 7/26/2014
Dept: DPT 300

< Previous Pay Period | Next Pay Period > Pay Period Finder:

Time Card Options

- Show Scheduling Information
- Show Only Missing Punches
- Show Unrounded Times
- Show Time Card Audit Log**
- Approve Time Card

Edit	In	Out	Break	Category	Hours	Amount	Dept	Mileage
Add	-	-	-	-	-	-	-	-
Add	-	-	-	-	-	-	-	-
Add	-	-	-	Vacation	8:00			

Time Card Audit Log X

Date range: 7/20/2014 thru 7/26/2014

Date	Action	Details	Date/Time of Change	Changed By	IP Address	Amount
07/23/2014	Add	Hours: 8; Category: Vacation;	07/23/2014, 03:32 PM	Webinar Client [WebinarC]	208.72.167.2	\$0.00
07/24/2014	Add	Hours: 8; Dept=: Mileage=0; Category: Holiday;	07/22/2014, 04:24 PM	Webinar Client [WebinarC]		ADDL PAY \$0.00
07/25/2014	Add	Hours: 8; Category: Vacation;	07/23/2014, 03:32 PM	Webinar Client [WebinarC]	208.72.167.2	\$0.00

TOTAL EDITED PUNCHES 3

Accrual balances as of 7/26/2014 Planned Time Off Balance including planned time as of 7/26/2014

Note: The balance including planned time does not account for future time accrued.

(Illustration 1.3)

Reports Menu

Time-Off Request Report

The “Time off Request Report” displays both approved and rejected time off requests. This report can be run for a specific date range, as well as specific employees.

Step 1. To run the “Time off Request Report,” select “Reports Menu” from the left pane.

Step 2. Click “Time off Request Report.”

Step 3. Decide which employees to include.

Step 4. Enter the date range, or use the pop up calendar (accessed by clicking in the date form field) to select the desired start and end dates.

Step 5. Click “Run Report.”

The screenshot shows the 'Time Off Request Report' configuration interface. On the left, a sidebar lists various reports, with 'Time Off Request Report' highlighted by a red box and a red arrow pointing to it. The main panel is titled 'Time Off Request Report' and contains the following options:

- Employees to include:** Radio buttons for 'All active employees' (selected), 'Specific employees', 'All active employees in group', and 'Select by criteria'.
- Show time off requests between:** Text input fields for 'Start Date' (11/1/2013) and 'End Date' (11/30/2013).
- Run Report:** A button to execute the report.

Step 6. The online view is displayed. To export the report, click on the “Printer Friendly” icon to print and or save the report.

The screenshot shows the online view of the 'Time Off Request Report'. A red box highlights the 'Printer Friendly' icon with a red arrow. Below the icon is a table with the following data:

Employee	Request Date	Status	Comments	Category	Requested Start Date	Requested End Date	From	To	Total Hours
Job Code, Josh	6/27/2013	Approved	Employee Comments: Thanksgiving with the in-laws Request Time Off Approved - Supervisor Comments: Approved Approved Hours: - 11/25/2013: 8:00 - 11/26/2013: 8:00 - 11/27/2013: 8:00 -	Vacation	Monday, November 25, 2013	Wednesday, November 27, 2013	-	-	24

Reports Menu

Work Month Report

The “Work Month Report” is designed to help clients with the Patient Protection and Affordable Care Act (PPACA) by providing total hours for each employee based on hours worked or all hours reported on the time card, with the exception of unpaid hours. The hours are broken out by full-time (FT), full-time equivalent (FTE), and non-full-time (NONFT) employees for a month’s time period.

Step 1. Select the “Reports Menu” from the left pane.

Step 2. Click “Work Month Report” found at the bottom.

Step 3. Choose the number of months you would like to include in the report, or

Step 4. Select the specific month/months.

Step 5. Enter the number of hours that are considered to be a full-time work month (commonly 130 hours).

Step 6. Determine which employees to include, for example, employees in a specific group.

Step 7. Choose which pay categories to include.

Step 8. Choose how the report should initially be sorted (The report can also be sorted while displayed).

Step 9. Identify what data to include (Tip: Try all three options to determine your preference).

Step 10. Click “Submit.”

The screenshot shows a software interface for generating a Work Month Report. On the left is a navigation menu with categories: Maintenance Menu, Reports Menu, and Settings Menu. The Reports Menu is expanded, showing options like Mobile and Web Clock Access, Pay Period Summary, Pay Period Sub-Totals, Custom Reports, Time Card Audit Log, Detail Report, Labor Report, Punch Notes Report, Summary Report, Time Off Request Report, Work Month Report, and Work Week Report. The main area is titled 'Work Month Report' and contains a description: 'Shows total hours for each employee, broken down by full-time and non-full-time. To report Salary or Seasonal Employees you will need to put the keyword "Salary" or "Seasonal" in to the Employee Setup Options field'. Below this are several configuration sections: 'Report Months' with radio buttons for One Month, Two Months, Three Months (selected), Four Months, Five Months, Six Months, 1 Year, and Select Months; 'Hours for determining a Full-Time Work Month.' with a text input field containing '130'; 'Include which employees?' with radio buttons for All active employees (selected), All employees (including inactive), Specific employees, All employees in group(s), and Select by criteria; 'Category Options' with radio buttons for All Categories (selected) and Select Categories; 'Sort By' with radio buttons for Name (Last,First) (selected) and Employee Code; and 'Show Data' with checked checkboxes for Show Summary, Show Employee Details, and Show Monthly Breakdown. A 'Submit' button is at the bottom right.

Reports Menu

Work Month Report - Continued

The Work Month Report can be exported to a .csv format.

Work Month Report												
											Timekeeping Demo 11/1/2014	
Print		Export to CSV										
Report Date : 2014-11 to 2014-11												
Type	Total Employees	Total Hours	Average Monthly Hours									
Salary Employees	1	-	-									
Seasonal Employees	1	-	-									
Full-Time Employees	1	143.62	143.62									
Non-Full-Time Employees	9	614.40	68.27									
Full-Time Equivalent Employees	5	-	-									
Total Full-Time and Equivalent Employees	7	-	-									

*The hours in this report exclude any hours listed in the "Unpaid" column on timecards.

#	Name	Start Date	End Date	Employee Type	Home Department	Home Location	Home Supervisor	Days Worked	Total Hours	Average Monthly Hours	Employee Type (Calculated)	2014-11
1	Accruals, Austin	2003-10-01		Hourly Full Time	DPT 300	Maple Blvd	Susie Simple, Gavin Groups	18	143.62	143.62	Full-Time	143.62
2	Bulletin, Bethany	2014-10-20		Seasonal	DPT 100	Corporate	Susie Simple	11	64.37	64.37	Seasonal	64.37
3	Forgetful, Frank	2011-10-01		Hourly	DPT 300	Main Street	Susie Simple	16	83.17	83.17	Non-Full-Time	83.17
4	Groups, Gavin	2010-06-23		Hourly Full Time	DPT 500	Maple Blvd	Marcus Manager	2	16.00	16.00	Non-Full-Time	16.00
5	Job Code, Josh	2012-10-01		Hourly	DPT 200	Main Street	Gavin Groups	14	67.33	67.33	Non-Full-Time	67.33
6	Mileage, Marcus	2007-03-05		Hourly Full Time	DPT 300	Corporate	Susie	17	77.55	77.55	Non-Full-Time	77.55
7	Overtime, Oscar	2007-03-05		Hourly	DPT 100	Main Street	Gavin Groups	14	75.97	75.97	Non-Full-Time	75.97
8	PTO, Paige	2012-10-01		Hourly	DPT 300	Corporate	Susie Simple	12	74.02	74.02	Non-Full-Time	74.02

Note: The ACA requirement states that if the combined total of Full-Time Employees and Full-Time Equivalent Employees are 50 or more, health insurance is required for all Full-Time Employees.

Reports Menu

Work Week Report

The “Work Week Report” is designed to help clients with the Patient Protection and Affordable Care Act (PPACA) by providing total hours for each employee based on hours worked or all hours reported on the time card, with the exception of unpaid hours. The hours are broken out by full-time (FT), full-time equivalent (FTE), and non-full-time (NONFT) employees for a month’s time period.

- Step 1.** Select the “Reports Menu” from the left pane.
- Step 2.** Click “Work Week Report” found at the bottom.
- Step 3.** Enter the Beginning Date to determine where the report should start.
- Step 4.** Specify the number of weeks the report should include.
- Step 5.** Enter the number of hours that are considered as a full-time work week.
- Step 6.** Determine which employees to include, as an example, employees in a specific group.
- Step 7.** Choose how the report should be sorted.
- Step 8.** Identify what data to include.
- Step 9.** Click “Submit.”

Work Week Report	
Shows total hours for each employee, broken down by full-time and non-full-time. To report Salary or Seasonal Employees you will need to put the keyword "Salary" or "Seasonal" in to the Employee Setup Options field	
Ending Date of Report	<input type="text" value="11/22/2014"/>
Count of Weeks to Report	<input type="text" value="4"/>
Hours for determining a Full-Time Work Week.	<input type="text" value="30"/>
Include which employees?	<input checked="" type="radio"/> All active employees <input type="radio"/> All employees (including inactive) <input type="radio"/> Specific employees <input type="radio"/> All employees in group(s) <input type="radio"/> Select by criteria
Category Options	<input checked="" type="radio"/> All Categories <input type="radio"/> Select Categories
Sort By	<input checked="" type="radio"/> Name (Last,First) <input type="radio"/> Employee Code
Show Data	<input checked="" type="checkbox"/> Show Summary <input checked="" type="checkbox"/> Show Employee Details <input checked="" type="checkbox"/> Show Weekly Breakdown
<input type="button" value="Submit"/>	

Reports Menu

Work Week Report Continued

This report may be printed or exported to a .csv format.

Work Week Report												
											Timekeeping Demo 11/4/2014 thru 11/24/2014	
<input type="button" value="Print Summary"/> <input type="button" value="Print Employees"/> <input type="button" value="Export to CSV"/>												
Report Date: 2014-11-04 to 2014-11-24												
Type	Total Employees	Total Hours	Average Weekly Hours									
Full-Time Employees	3	360.88	40.10									
Non-Full-Time Employees	8	454.95	18.96									
Total Full-Time Employees	3	-	-									

*The hours in this report exclude any hours listed in the "Unpaid" column on timecards

Report Date: 2014-11-04 to 2014-11-24													
#	Name	Start Date	Employee Type	Home Department	Home Location	Home Supervisor	Days Worked	Total Hrs	Average Weekly Hrs	Employee Type (Calculated)	11/18/2014 thru 11/24/2014	11/11/2014 thru 11/17/2014	11/4/2014 thru 11/10/2014
1	Accruals, Austin	2003-10-01	Hourly	DPT 300	Maple Blvd	Susie Simple, Gavin Groups	15	120.03	40.01	Full-Time	40.00	40.03	40.00
2	Bulletin, Bethany		Hourly	DPT 100			11	64.37	21.46	Non-Full-Time	17.02	22.80	24.55
3	Forgetful, Frank	2011-10-01	Hourly	DPT 300	Main Street	Susie Simple	13	62.17	20.72	Non-Full-Time	20.98	18.38	22.80
4	Groups, Gavin	2010-06-23	Hourly Part Time	DPT 500	Maple Blvd	Marcus Manager	15	120.00	40.00	Full-Time	40.00	40.00	40.00
5	Job Code, Josh	2012-10-01	Hourly	DPT 200	Main Street	Gavin Groups	11	46.33	15.44	Non-Full-Time	14.07	18.87	13.40
6	Mileage, Marcus	2007-03-05	Hourly	DPT 300	Corporate	Susie	14	59.10	19.70	Non-Full-Time	17.88	16.33	24.88
7	Overtime, Oscar	2007-03-05	Hourly	DPT 100	Main Street	Gavin Groups	11	52.97	17.66	Non-Full-Time	18.00	18.65	16.32
8	PTO, Paige	2012-10-01	Hourly	DPT 300	Corporate	Susie Simple	9	53.02	17.67	Non-Full-Time	17.00	16.17	19.85
9	Restaurant, Roberto	2012-10-01	Hourly	DPT 200	Main Street	Gavin Groups	13	56.35	18.78	Non-Full-Time	17.57	14.17	24.62
10	Simple, Susie	2012-10-01		DPT 500	Main Street	Marcus Manager	15	120.85	40.28	Full-Time	40.00	40.10	40.75

Note: The ACA requirement states that if the combined total of Full-Time Employees and Full-Time Equivalent Employees are 50 or more, health insurance is required for all Full-Time Employees.

Settings

Employee Bulletin

The “Employee Bulletins” feature allows you and your supervisors to add an “announcement” that will appear on the dashboard of the “Employee Self Service” portal. The announcement can be applied to all employees for general information or to specific employees depending on the message you are relaying.

Step 1. Select the “Settings Menu” from the left pane.

Step 2. Select “Employee Bulletins.”

Step 3. Click the “Add New” button.

Step 4. Name the bulletin. Example: ‘Annual Review’

Step 5. Select the start date of when you would like the announcement posted.

Note: If no end date is selected, the announcement will stay active until it is deleted or an end date has been added

Step 7. Select the end date of when the announcement should be removed.

Note: If no end date is selected, the announcement will stay active until it is deleted or an end date has been added.

Step 8. Choose the employees that the announcement should be visible to.

Step 9. Key or copy/paste the announcement into the box provided.

Note: The announcement will appear exactly as you have entered it.

Step 10. Click “Save” once complete.

The screenshot shows a web application interface for "Employee Announcements". The top navigation bar includes "Find employees", "Find Demo", and "Hello Demo | Home | Help | Log Out". The left sidebar contains a "MAIN MENU" with "Demo" selected, and a "Settings Menu" with "Employee Bulletins" selected. The main content area is titled "Employee Announcements" and contains the following fields and options:

- Bulletin Name:** Annual Review
- Start Date:** 7/8/2013
- End Date:** 7/10/2013
- Employee(s):** Radio buttons for "All active employees" (selected) and "Specific employees". Below this is a dropdown menu set to "Active Employees" and "Check All | Uncheck All" links.
- Employee Selection:** A grid of checkboxes for individual employees: Blank, Barry; Location, Leon; PTO, Paige; Shift, Samuel; Forgetful, Frank; Mileage, Millie; Restaurant, Roberto; Simple, Susie; Job Code, Josh; Prompts, Paul; Rounded, Ricky.
- Announcement:** A text area containing the message: "Your annual review is scheduled for July 10th at 10:00am."
- Buttons:** "Save" and "Return to list of employee announcements".

Settings

Add a Supervisor Login

To give access to a set of administrative capabilities for a particular login account, create supervisor logins. The administrative account settings are accessible via a login and password that you create. Permissions and restrictions can be assigned upon login.

Step 1. From the “Maintenance Menu” on the left pane, select the "Login Maintenance" link. (See illustration 1.1). Selecting the "Login Maintenance" link will display your current login accounts. Note: You can change or delete any of the login accounts by selecting the login name and using the options provided.

Step 2. Click the "Add New Login" link which is found at the top of the page. (See illustration 1.1).

Client	Login	Account Type	Name	Email	Phone	Restrictions
Timekeeping Demo	MarcusManager	Supervisor \$ # @	Manager, Marcus	marcus@manager.com		Filtered
Timekeeping Demo	Timekeeping Supervisor	Supervisor \$ # @	Simple, Susie	supervisor@timekeeping.com		Filtered
Timekeeping Demo	TimekeepingDemo	Client	Demo, Timekeeping	demo@timekeeping.com	555-555-5555	None

(Illustration 1.1)

Step 3. This screen allows you to add a new supervisor level login/password combination to the system. Complete the “New Login”, “New Password”, “Confirm New Password”, “First” and “Last” name fields. The supervisor will be prompted to complete the remaining fields during their first login. (See illustration 1.2).

Settings

Add a Supervisor Login Continued

Add New Login	
This screen lets you add a new login/password combination to the system. This is only for adding employer or supervisor access, not for employees to clock in or out with the web clock.	
<i>The new password must be at least eight characters long AND have two different classes of characters (e.g., uppercase, lowercase, symbols, or numbers).</i>	
<input checked="" type="radio"/> Supervisor Login for Webinar Client	Limited access to a single client account, such as view-only, or access to a partial list of employees.
User Information:	
New Login:	<input type="text"/>
New Password:	<input type="password"/>
Confirm New Password:	<input type="password"/>
First Name:	<input type="text"/>
Last Name:	<input type="text"/>
Phone:	<input type="text"/>
E-mail Address:	<input type="text"/>
Confirm E-mail:	<input type="text"/>
<input type="button" value="Save"/>	



(Illustration 1.2)

Step 4. After you have saved the login and password, you are able to set permissions/restrictions. The restrictions section is based on the “Supervisor Account Employee Visibility.” Select which employees the supervisor will be able to view. If using “Time Card Approvals,” select which employee time cards the supervisor can approve. (See illustration 1.3).

Step 5. Once complete, Click “Update Employee Visibility Settings.”

Step 6. Next, determine which permissions the supervisor will have access to from the list of options in the “Supervisor Account Permissions.”

Note: If this client was previously active on the TimeWorks system, enter “Archived Data Reports” in the “Enter Named Permissions” field. This provides the supervisor with access to view history from the TimeWorks system through select reports.

Step 7. Once complete, click Update Permissions.

Settings

Add a Supervisor Login Continued

SUPERVISOR ACCOUNT EMPLOYEE VISIBILITY

Which employees is this supervisor allowed to see?
If you select by group or criteria, the specific employees that can be seen will automatically follow changes that are made to employee setup.

- All active employees
- All employees (including inactive)
- Specific employees
- All employees in group(s)

DPT 200

- Select by criteria

Will this supervisor login need to view employee time cards when they work in their group, but are not directly reporting to this Supervisor?
A common example is an employee covering a shift at an alternate location than their usual assigned "Home" location.

Alternate employees visible to this login

This login can view employee time cards if...

Dept = Department 300

Advanced

[Advanced Custom Selection Help](#)

Of the employees this supervisor can see, for which employees is this supervisor allowed to approve time cards? Choose *All Employees* if the time cards that can be approved are the same as the time cards this supervisor can see.

- No employees
- All active employees
- All employees (including inactive)
- Specific employees
- All employees in group(s)

DPT 200

- Select by criteria

Update Employee Visibility Settings 

SUPERVISOR ACCOUNT PERMISSIONS

Select features that this supervisor is allowed to access. For special permissions, enter the name of the permission or permissions separated by a comma in the box below.

Enter Named Permissions: Archived Data Reports

- Can See Wages
- Can Edit Punches
- Can Access Employee Setup
- Can Edit/Delete Unmatched Punches

Update Permissions 

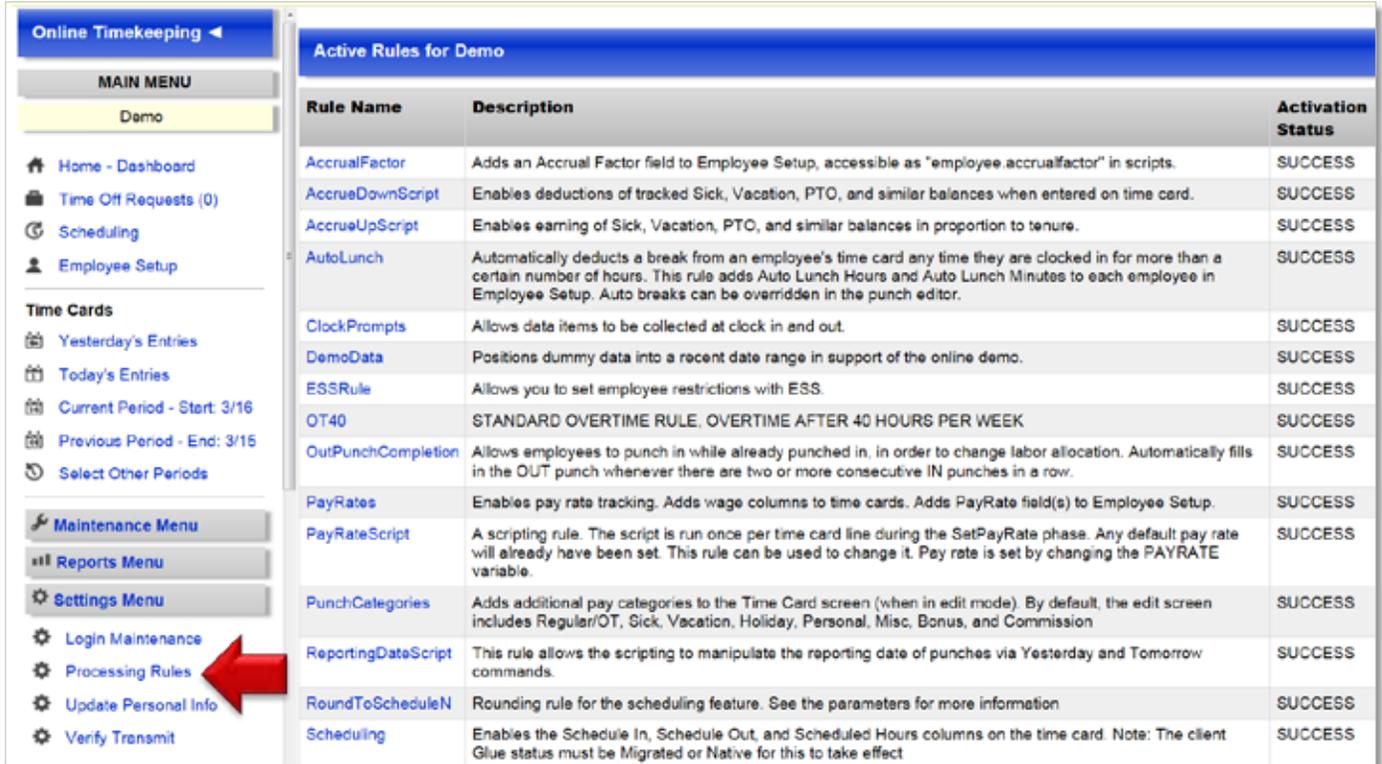
(Illustration 1.3)

Settings

Processing Rules

“Processing Rules” found in the “Settings Menu” will list all of your active company-wide rules. For questions concerning this list, please contact your timekeeping service provider.

Note: The image below is of a demo account; your list will differ depending on your specific settings.



The screenshot displays the 'Online Timekeeping' application interface. On the left is a navigation menu with sections: 'MAIN MENU' (containing 'Demo'), 'Time Cards' (with options like 'Yesterday's Entries', 'Today's Entries', 'Current Period - Start: 3/16', 'Previous Period - End: 3/15', 'Select Other Periods'), 'Maintenance Menu', 'Reports Menu', and 'Settings Menu'. Under 'Settings Menu', there are options for 'Login Maintenance', 'Processing Rules' (highlighted with a red arrow), 'Update Personal Info', and 'Verify Transmit'. The main content area is titled 'Active Rules for Demo' and contains a table with the following data:

Rule Name	Description	Activation Status
AccrualFactor	Adds an Accrual Factor field to Employee Setup, accessible as "employee accrualfactor" in scripts.	SUCCESS
AccrueDownScript	Enables deductions of tracked Sick, Vacation, PTO, and similar balances when entered on time card.	SUCCESS
AccrueUpScript	Enables earning of Sick, Vacation, PTO, and similar balances in proportion to tenure.	SUCCESS
AutoLunch	Automatically deducts a break from an employee's time card any time they are clocked in for more than a certain number of hours. This rule adds Auto Lunch Hours and Auto Lunch Minutes to each employee in Employee Setup. Auto breaks can be overridden in the punch editor.	SUCCESS
ClockPrompts	Allows data items to be collected at clock in and out.	SUCCESS
DemoData	Positions dummy data into a recent date range in support of the online demo.	SUCCESS
ESSRule	Allows you to set employee restrictions with ESS.	SUCCESS
OT40	STANDARD OVERTIME RULE, OVERTIME AFTER 40 HOURS PER WEEK	SUCCESS
OutPunchCompletion	Allows employees to punch in while already punched in, in order to change labor allocation. Automatically fills in the OUT punch whenever there are two or more consecutive IN punches in a row.	SUCCESS
PayRates	Enables pay rate tracking. Adds wage columns to time cards. Adds PayRate field(s) to Employee Setup.	SUCCESS
PayRateScript	A scripting rule. The script is run once per time card line during the SetPayRate phase. Any default pay rate will already have been set. This rule can be used to change it. Pay rate is set by changing the PAYRATE variable.	SUCCESS
PunchCategories	Adds additional pay categories to the Time Card screen (when in edit mode). By default, the edit screen includes Regular/OT, Sick, Vacation, Holiday, Personal, Misc, Bonus, and Commission	SUCCESS
ReportingDateScript	This rule allows the scripting to manipulate the reporting date of punches via Yesterday and Tomorrow commands.	SUCCESS
RoundToScheduleN	Rounding rule for the scheduling feature. See the parameters for more information	SUCCESS
Scheduling	Enables the Schedule In, Schedule Out, and Scheduled Hours columns on the time card. Note: The client Glue status must be Migrated or Native for this to take effect	SUCCESS

Employee Self-Service (ESS) Portal

Employee Self-Service Portal

The “Employee Self Service Portal” provides employees a set of self-management options for their personal time and attendance activities.

Note: This feature requires a discussion with your timekeeping provider and additional fees may apply.

Each option below is universal and available to all employees when activated; however, the option to edit the time card can be set specifically for each employee. Each option can be activated and deactivated depending on your specific requirements.

1. The “Welcome Dashboard” serves two purposes. “Announcements” for the employee, and a quick view for the current pay period “Statistics.”
2. The “Announcements” are messages from a supervisor or management informing you of upcoming events, meetings, etc.
3. “Statistics” gives you a quick view of the current pay periods stats such as the number of hours worked, edits made to the time card, requests for time off, etc.
4. The “Web Clock” allows an employee to clock in or out from within the ESS portal.
5. The “Time Card” is a standard feature that gives the employee the ability to view their time card. An option is available to allow employees to add notes, edit, or add time punches to their own time card.
6. “Schedule” is a great way for supervisors or managers to inform their employees as to what their schedule will be for a specific date range.
7. With “Request Time Off” the employee can manage and send requests for time off to a supervisor, manager or both.
8. With the “Accruals Report” the employee will be able to enter a date range and view accrual balances such as vacation, sick, or paid time off (PTO).
9. The “Personal Information” section gives an employee the ability to update their own basic information such as password, phone number, and email address.

The screenshot shows a web interface titled "Employee Self Service Portal - Timekeeping Demo". On the left is a vertical navigation menu with items 1 through 9: Dashboard, Web Clock, Time Card, Schedule, Time Off Requests, Accruals Report, and Personal Information. The main content area is titled "Welcome Dashboard" and contains a welcome message from "Susie Simple". Below the message are two sections: "Announcements" with a notice about an annual review on December 16th, and "Statistics" showing various metrics like total hours worked, missing punches, and pending requests, all with a value of 0.

Menu Item	Content
1 Dashboard	Welcome Dashboard
4 Web Clock	Susie Simple, welcome to your employee portal.
5 Time Card	2 Announcements: 12/9/2014: Your annual review is scheduled for Tuesday December 16th at 10:30am.
6 Schedule	3 Statistics: <ul style="list-style-type: none">Total hours worked this pay period: 0:00Total missing punches: 0Edits made to your time card this period: 0Pending Time Off Requests: 0Total time card notes for this period: 0
7 Time Off Requests	
8 Accruals Report	
9 Personal Information	

Employee Self-Service (ESS) Portal

Employee Self-Service Schedule

The “Employee Self Service” (ESS) portal is a great way for your employees to have access to their schedule, making it easy for them to know when they are expected to be at work. Both the employer and supervisor can set up, and maintain, the employee schedules.

Employee Self Service Portal - Timekeeping Demo

View your assigned schedule below.

View a pay period by date:

< [Previous Pay Period](#) | [Next Pay Period](#) >

Sun 12/7/2014	Mon 12/8/2014	Tue 12/9/2014	Wed 12/10/2014	Thu 12/11/2014
IN <input type="text"/>	IN <input type="text" value="9:00 AM"/>	IN <input type="text" value="1:00 PM"/>	IN <input type="text" value="10:00 AM"/>	IN <input type="text"/>
OUT <input type="text"/>	OUT <input type="text" value="4:00 PM"/>	OUT <input type="text" value="6:00 PM"/>	OUT <input type="text" value="5:00 PM"/>	OUT <input type="text"/>

Fri 12/12/2014	Sat 12/13/2014
IN <input type="text" value="9:00 AM"/>	IN <input type="text" value="8:00 AM"/>
OUT <input type="text" value="5:00 PM"/>	OUT <input type="text" value="4:30 PM"/>



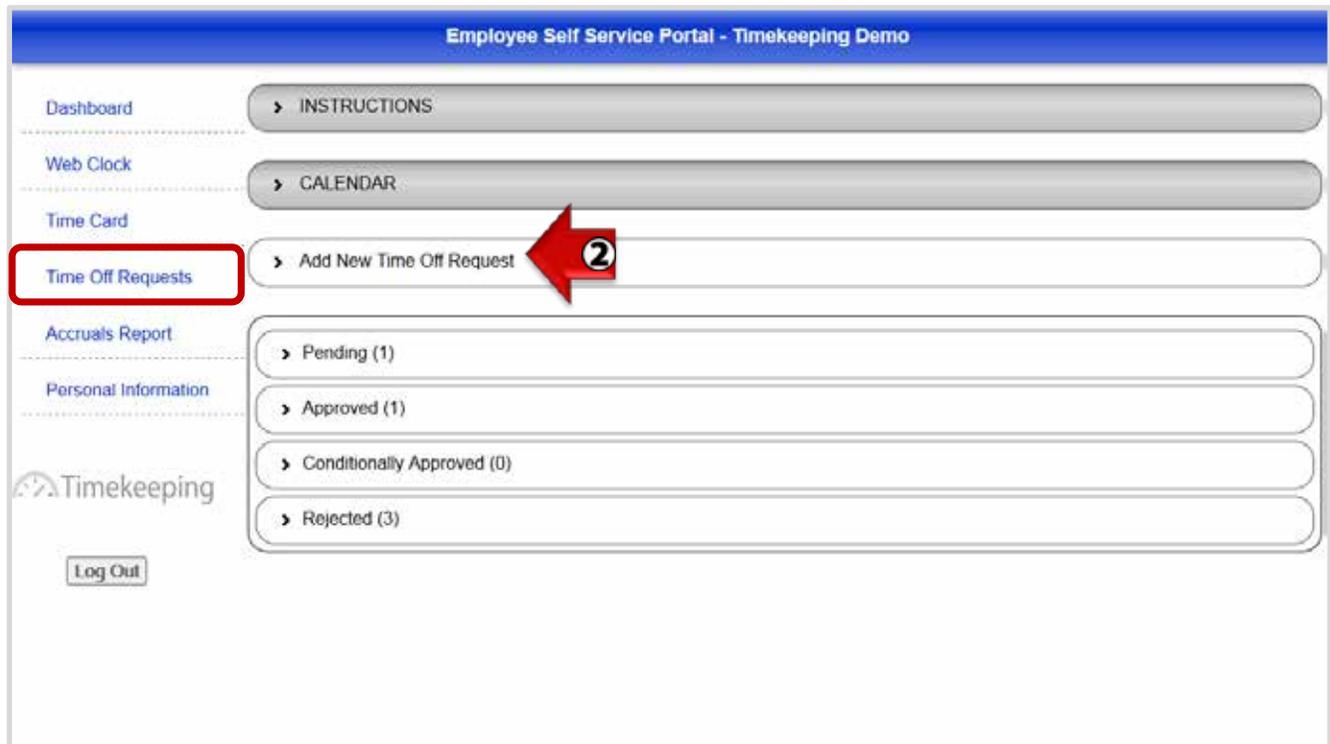
Employee Self-Service (ESS) Portal

Time-Off Request Employee Steps

From the ESS Portal, click on “Request Time Off,” and follow the steps on the page to submit a time off request. Click on the “Instructions” arrow (>) for a general overview of the “Time off Request” process. Click on the “Calendar” arrow (>) to view approved time off for the entire month. If an employee needs access to the ESS Portal, see the ESS How To article.

Step 1. Login to the ESS Portal and click “Time off Requests.”

Step 2. Click the “Add New Time off Request” (>) to view options.



Step 3. Click the blue “Department Time Off List” button to see if other employees in the department have time off already approved (see screen view below).

Step 4. Select the “Category” that best represents the request such as vacation or sick time.

Step 5. Select single day, multiple days or a partial day.

Step 6. Enter a “Description” for the requested time Off. This field is required.

Step 7. This section displays the name of the supervisor that the email notification will go to by default when you submit your request. There is an option to send your “Time off Request” to another manager as well.

Step 8. Review the form, and click “Save Request” to submit your request.

Employee Self-Service (ESS) Portal

Time-Off Request Employee Steps - Continued

Department time off list **3**

Type	Accrual balances as of 12/21/2013	Planned Time Off	Balance including planned time as of 12/21/2013
SICK	8 hours	0 hours	8 hours
VACATION	48 hours	0 hours	48 hours

Note: The balance including planned time does not account for future time accrued.

Category **PTO** **4**

Single Day

Date

Hours **5**

Multiple Days

Partial Day - Times

Description **6**

The following people will receive a notification of this time off request **7**

- Susie Simple
- Gavin Groups

(Optional) Send an email notification to the following managers

Timekeeping Demo

Save Request **8**

Employee Self-Service (ESS) Portal

Time-Off Request Employee Steps Continued

Once a "Time off Request" is made the request will move to the "Pending" section. From there, the request will either move to the "Approved," "Conditionally Approved," or "Rejected" section depending on the supervisor or manager's decision. The employee will be notified of the decision via email.

Details of a request can be viewed from the "Pending," "Approved," "Conditionally Approved," and "Rejected" sections. For example click on "Approved" to see the list of "Approved" requests (as seen below). Click the (>) on a specific "Approved" request to view details.

The screenshot shows the 'Employee Self Service Portal - Timekeeping Demo' interface. It features a blue header bar with the title. Below the header are several menu items: 'INSTRUCTIONS', 'CALENDAR', 'Add New Time Off Request', 'Pending (0)', 'Approved (2)', 'Conditionally Approved (0)', and 'Rejected (3)'. The 'Approved (2)' section is expanded, showing two requests. The first request is for PTO on Thursday, December 26, 2013, to Friday, January 3, 2014, for Paige. The second request is for PTO on Friday, December 20, 2013, for Paige. A red arrow points to the 'Approved (2)' section. Below the list, there is a detailed view of the December 20, 2013 request, including a summary of the time off, a breakdown of the days (Friday 4), a total of 4 days, and comments from the employee and supervisor.

Date	Type	Requester	Period	Status
12/12/2013	PTO	Paige	Thursday, December 26, 2013 - Friday, January 3, 2014	APPROVED
12/16/2013	PTO	Paige	Friday, December 20, 2013	APPROVED

On 12/16/2013 you requested the following days off using PTO time: **Friday, December 20, 2013**

This equates to:
Friday 4
Total 4

Employee Comments: Family party.
Supervisor Comments: Approved by Timekeeping Demo and no comments provided.

Employee Self-Service (ESS) Portal

Time-Off Request Employee Steps - Continued

If a supervisor or management changes the “Category” or number of “Hours,” then the “Time off Request” will be moved to “Conditionally Approved” (see example below). From there the employee has the option to add a note or to “Approve” or “Reject” the change.

Note: The change will display in bold blue, just as an edit or addition displays in bold blue on the time card.

▼ Conditionally Approved (1)

▼ 12/16/2013 Simple, Susie Tuesday, December 24, 2013 **CONDITIONALLY APPROVED** ✖ ✔

Original Request

On December 16, 2013, you submitted the following time off request:

Date	Category	Hours
Dec 24, 2013	PTO	8
Total		8

Proposed Request

Your Supervisor has changed your time off request to the following:

Date	Category	Hours
Dec 24, 2013	Sick	8
Total		8

Employee Comments: Vacation
Supervisor Comments: Hours used should be Sick pay.

TimeWorks Mobile

TimeWorks Mobile For the Employee

The TimeWorks Mobile app allows employees to track their hours on-the-go, punch IN\OUT, view available time off hours, and more. The mobile app is available on either the iTunes™ App Store (IOS devices) or GooglePlayT™ App Store (Android devices). The app can be downloaded for free.

Follow the steps below to access and use the mobile app.

Step 1. Download TimeWorks Mobile app from iTunes, for the iPhone and iPad, or from the Google Play Store for Android phones and tablets. Look for the TimeWorks Mobile app icon below.



Step 2. On your mobile device open the “TimeWorks Mobile” app and enter your user name and password (Fig 1.1). If this is the first time you are logging in, you will be prompted to change your password. Enter the password, which you should have received from your supervisor/employer, and create the new password (Fig 1.2).

Note: If the supervisor login and the employee login are the same, the supervisor will be directed to the supervisor portal and cannot access the employee portal. A separate user ID and password (different from what is setup in Login Maintenance) will need to be setup in the supervisor’s “Employee Setup” profile.

A screenshot of the TimeWorks Mobile app's login screen. At the top, the status bar shows 'Verizon LTE', '9:14 AM', and '70%' battery. The app title 'TimeWorks Mobile' is centered at the top. Below it is a blue header with the text 'Please Log in'. Underneath are two input fields: 'Username' and 'Password'. A blue 'Log in' button is positioned below the fields. At the bottom, the text 'Version 1.6.1' is displayed.A screenshot of the TimeWorks Mobile app's 'Change Password' screen. At the top, there is a 'Back' button and the title 'TimeWorks Mobile'. The main heading is 'Change Password'. Below this, a message states: 'You are required to change your password.' This is followed by instructions: 'Instructions: Passwords must be at least eight characters and contain at least two types of characters (uppercase, lowercase, symbol or number)'. There are three input fields labeled 'Current Password', 'New Password', and 'Confirm New Password'. A 'Submit' button is located at the bottom right.

TimeWorks Mobile

TimeWorks Mobile for the Employee Continued

Step 3. “TimeWorks Mobile” offers several options to the employee. See below for details (Fig. 1.3)

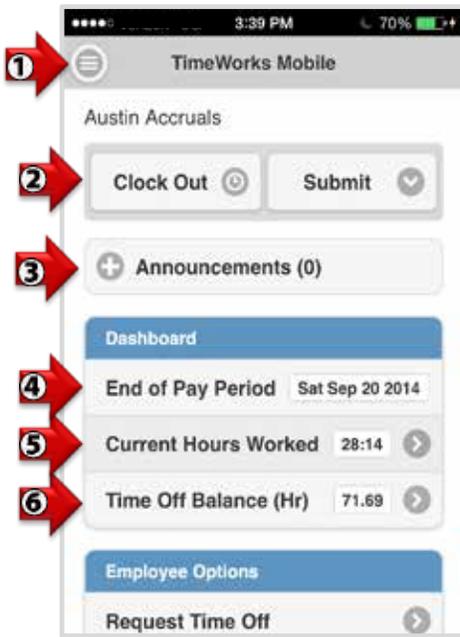


Figure 1.3 TimeWorks Mobile Main Menu

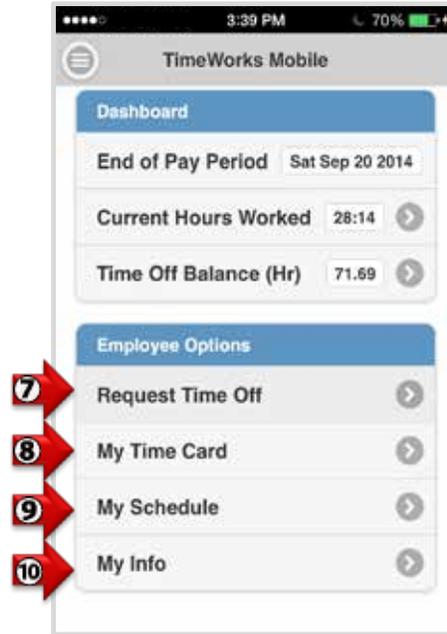


Figure 1.4 TimeWorks Mobile Main Menu

1. Menu icon, see Fig. 1.3. Tap on the menu icon to access additional features. See Fig. 1.4.
2. Clock IN and OUT by tapping on the “Clock IN/OUT” button, and then tap the “Submit” button. This option will not display if you do not have permissions to clock IN or OUT on the mobile app.
3. View “Announcements” from your supervisor or manager. Tap the (+) symbol.
4. Displays the last day of the current pay period.
5. Tap the arrow to see an overview of hours e.g. regular or overtime hours.
6. Tap the arrow to see an overview of accrued hours such as Vacation or PTO. NOTE: This feature will only display if accruals are tracked through your timekeeping account.
8. View your time card for the current pay period one day at a time. Also, If give permissions you may edit existing punches, approve your time card, and view “Pinpoint GPS” information.
9. View your schedule one day at a time for the current pay period.
10. Tap the arrow to see employee name, department, email, employee number, etc.

Step 4. Tap on the menu icon (see number one of figure 1.3) to access the following features (Fig. 1.5).

TimeWorks Mobile

TimeWorks Mobile for the Employee Continued

The TimeWorks Mobile app allows employees to track their hour's on-the-go, punch IN\OUT, view available time off hours, and more. The mobile app is available on either the iTunes™ App Store (IOS devices) or GooglePlayT™ App Store (Android devices). The app can be downloaded for free.

Follow the steps below to access and use the mobile app.

Step 1. Download TimeWorks Mobile app from iTunes, for the iPhone and iPad, or from the Google Play Store for Android phones and tablets. Look for the TimeWorks Mobile app icon below.



Step 2. On your mobile device open the “TimeWorks Mobile” app and enter your user name and password (Fig 1.1). If this is the first time you are logging in, you will be prompted to change your password. Enter the password, which you should have received from your supervisor/employer, and create the new password (Fig 1.2).

Note: If the supervisor login and the employee login are the same, the supervisor will be directed to the supervisor portal and cannot access the employee portal. A separate user ID and password (different from what is setup in Login Maintenance) will need to be setup in the supervisor’s “Employee Setup” profile.

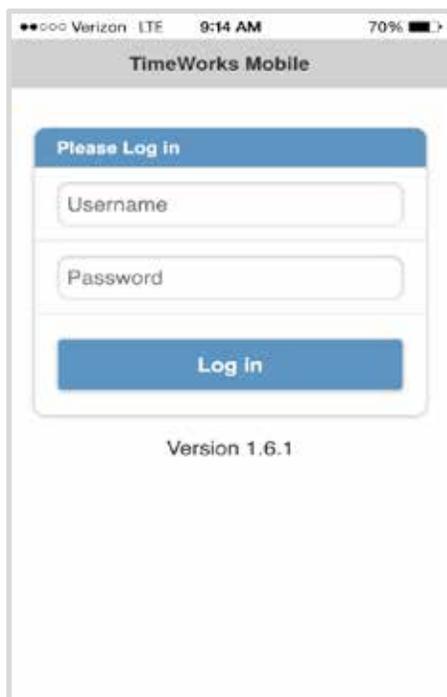


Figure 1.1 TimeWorks Mobile Log in

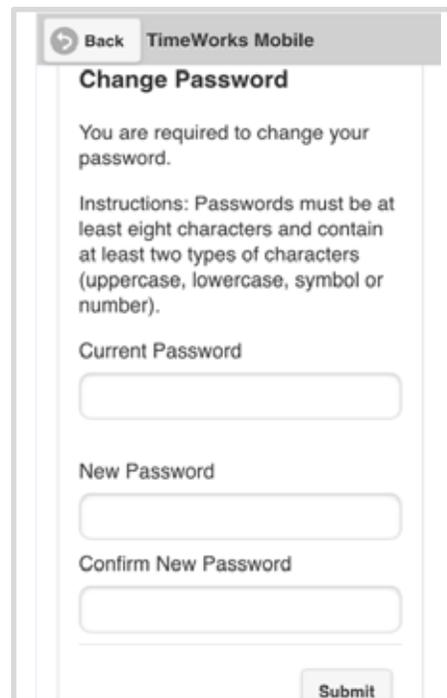


Figure 1.2 TimeWorks Mobile Password

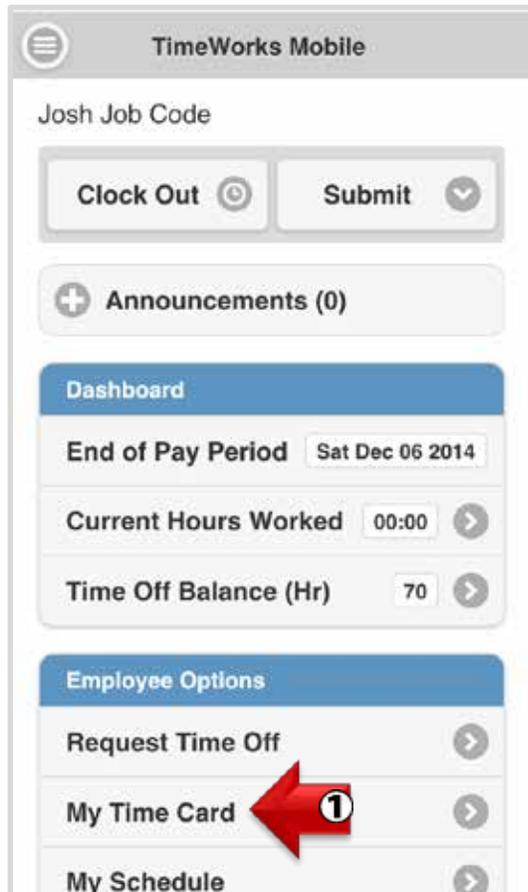
TimeWorks Mobile

Pinpoint GPS for the Employee

TimeWorks Mobile app Pinpoint GPS captures the location of where an employee is when they clock IN/OUT. There are two views provided: 1) a map with pinpoints, and 2) the address with nearest location.

Before using the Pinpoint GPS feature you will need to accept the permissions to allow Pinpoint GPS to activate the location services on your mobile device.

Step 1. From the dashboard page on your mobile device tap on “My Time Card.”



Pinpoint GPS only applies to punches made with the TimeWorks Mobile app. On the time card the red pin icon (looks like an upside down rain drop) indicates the time punch was made from a mobile device.

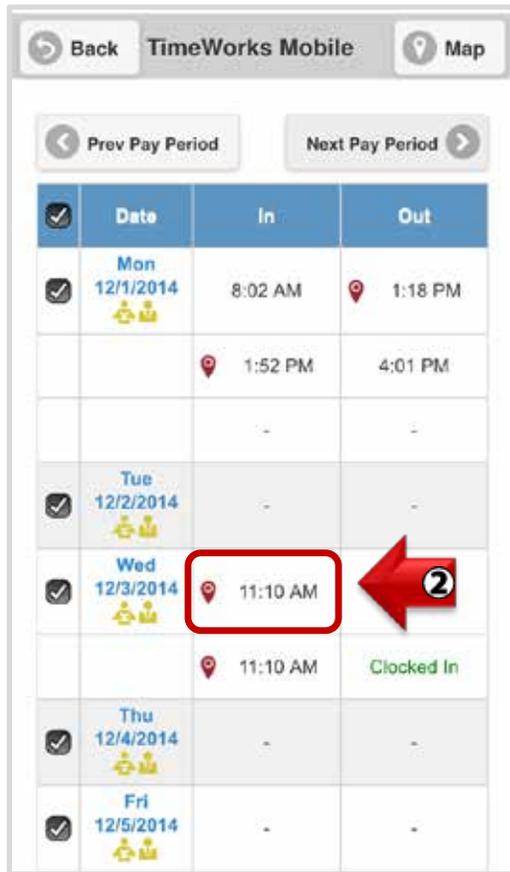
If the icon appears with a slash through it this means that Pinpoint GPS was unable to capture the location data, hence the location data is not available.

Step 2. Tap on the time punch to view the Pinpoint GPS coordinates.

Note: You may also tap on the “Map” button located in the top right corner to access the Pinpoint GPS map.

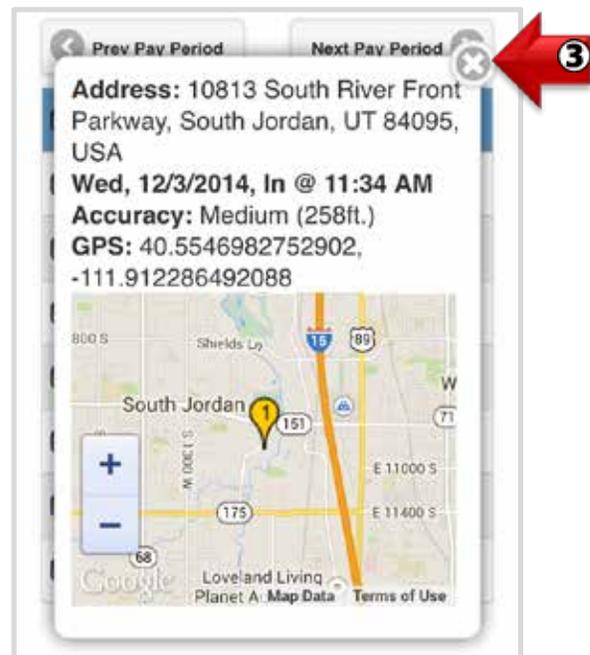
TimeWorks Mobile

Pinpoint GPS for the Employee Continued



✓	Date	In	Out
✓	Mon 12/1/2014	8:02 AM	1:18 PM
		1:52 PM	4:01 PM
✓	Tue 12/2/2014	-	-
✓	Wed 12/3/2014	11:10 AM	Clocked In
✓	Thu 12/4/2014	-	-
✓	Fri 12/5/2014	-	-

The map displays detailed information regarding the address, date, accuracy of location, and GPS coordinates.



Step 3. To exit the Pinpoint GPS map tap on the (X) button located in the top right corner.

Note: To view more of the map tap on the plus (+) or minus (-) buttons.

TimeWorks Mobile

TimeWorks Mobile for Management

The “TimeWorks Mobile” app allows client and supervisor level logins to track employee hours, approve or reject time off requests, clock employees IN/OUT, and view basic employee information including Pinpoint GPS on both Apple and Android devices. Follow the steps below to access and use the “TimeWorks Mobile” app.

Before using the mobile app, you will need to contact your timekeeping provider to have any or all of the following options enabled:

Option one: “Mobile Enabled,” which allows access to the “TimeWorks Mobile” app, and adds a field to the “Employee Setup” for employee by employee access to the mobile app. (see illustration 1.1).

Option two: “Mobile Punch Enabled,” which allow employees to clock In/Out through the mobile app, and adds a field to the “Employee Setup” for employee by employee access to mobile punch.

Option three: “Add GPS to Mobile Punch,” which allows access to view the location and address of where an employee clocked In/Out of.

Note: The mobile app must be enabled in order for employees to clock In/Out.

Identity <input type="button" value="Edit"/>	
Employee Code	1006
First Name	Susie
Middle Name	
Last Name	Simpl
Designation	
Phone	800-555-4
E-mail	susie@tir
Start Date	2012-10-4
Separation Date	
Export Block	Not blockou
Web Clock Enabled	Yes
Mobile Punch Enabled	Yes
Mobile Enabled	Yes
Add GPS to Mobile Punch (If Available)	Yes
Options	

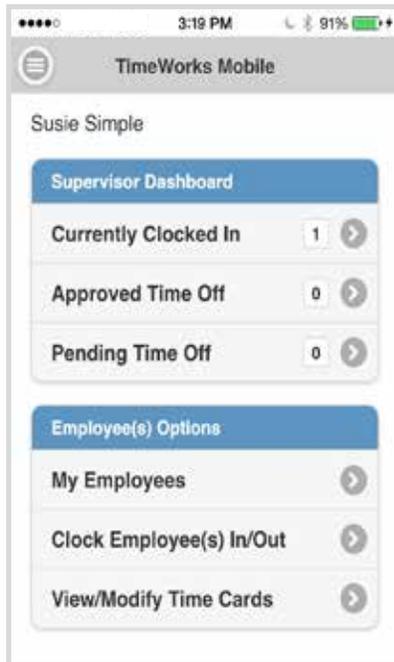
(Illustration 1.1)

Log into “TimeWorks Mobile” with a client or supervisor level login. Set up login credentials from the “Login Maintenance” page. If credentials are already set up go ahead and log in.

Note: The “Refresh” button will update the “TimeWorks Mobile” page with new information. An example of when you might find this useful is when an employee requests time off.

TimeWorks Mobile

TimeWorks Mobile for Management Continued



The feature within the “TimeWorks Mobile” Supervisor Portal include:

Currently Clocked In:

- View the number of employees currently clocked IN.
- By tapping on the arrow (>) you will see the list of employees currently clocked in. This screen allows you to view punch IN details such as, what department an employee punched into.

Approved Time Off:

- View the number of employees with approved time off for the current day.
- Move backwards and forwards a day at a time to view other employees with approved time off.
- Expand and view available details for each employee with time off. For full details, log into the timekeeping system.

Pending Time Off:

- View the number of pending time off requests.
- Expanding to see available details of each request such as total hours accrued, add comments, and reject or approve request. For full detail, log into the timekeeping system.

My Employees:

- View the list of employees that you supervise.
- See basic details about employees such as start date, department, email address, etc.
- Clock employees IN or OUT.

Clock Employee(s) In/Out:

- View which employees are currently clocked IN.
- Clock one or multiple employees IN or OUT.

View/Modify Time Cards:

- View and approve employee’s time cards.
- Edit existing In/Out time punches on your employee’s time card.
- View where an employee is at the time of their clock In/Out through Pinpoint GPS.

TimeWorks Mobile

Pinpoint GPS View for the Client and Supervisor

TimeWorks Mobile Pinpoint GPS captures the location of where an employee is when they clock IN/OUT. There are two views provided: 1) a map with pinpoints, and 2) the address with nearest location.

Before using the Pinpoint GPS feature you will need to accept the permissions to allow Pinpoint GPS to activate the location services on your mobile device.

Step 1. In the “Employee Setup” field “Add GPS to Mobile Punch (If Available)” will need to be set to “Yes” this will enable you to view Pinpoint GPS data on mobile punches.

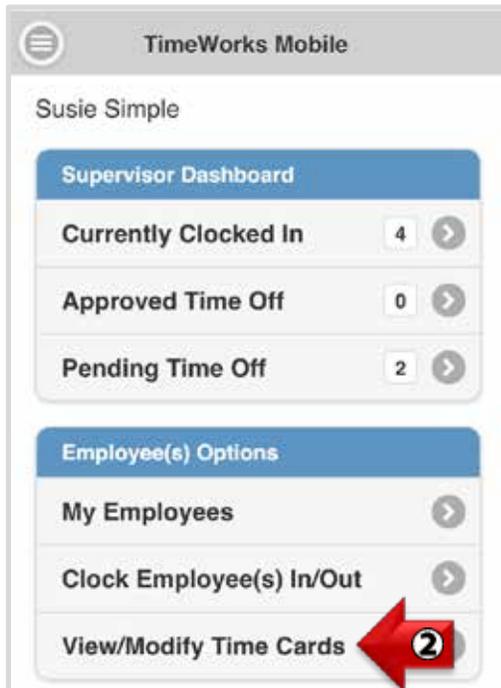
Note: As with any cellular service there may be instances when a mobile user may be without a cellular data signal and in this instance data would not be available. Also, if the user turns off the “location services” setting on their iPhone, iPad or Android device the Pinpoint GPS wouldn't be able to collect their punch location data.

Employee Setup 	
Identity <input type="button" value="Edit"/>	
Employee Code	
First Name	Austin
Middle Name	
Last Name	Accruals
Designation	
Phone	
E-mail	austinaccruals@sampleemail.com
Start Date	2003-10-01
Separation Date	
Export Block	Not blocked
Web Clock Enabled	Yes
Mobile Punch Enabled	Yes
Mobile Enabled	Yes
Add GPS to Mobile Punch (If Available)	Yes 
Options	

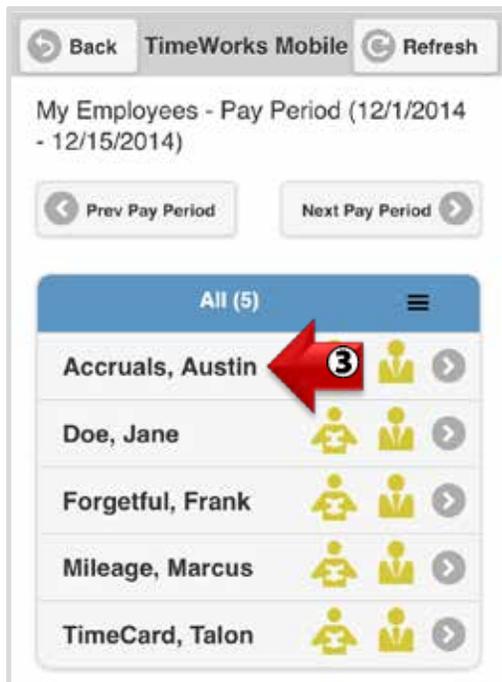
TimeWorks Mobile

Pinpoint GPS View for the Client and Supervisor Continued

Step 2. From the dashboard page on your mobile device tap on “View/Modify Time Cards.”



Step 3. Tap on an employee's name to view the time card.



TimeWorks Mobile

Pinpoint GPS View for the Client and Supervisor Continued

Pinpoint GPS only applies to punches made with the TimeWorks Mobile app. On the time card the red pin icon (looks like an upside down rain drop) indicates the time punch was made from a mobile device.

If the icon appears with a slash through it this means that Pinpoint GPS was unable to capture the location data, hence the location data is not available.

Step 4. Tap on the time punch to view the Pinpoint GPS coordinates.

The map displays detailed information regarding the address, date, accuracy of location, and GPS coordinates. To view more of the map tap on the plus (+) or minus (-) buttons.

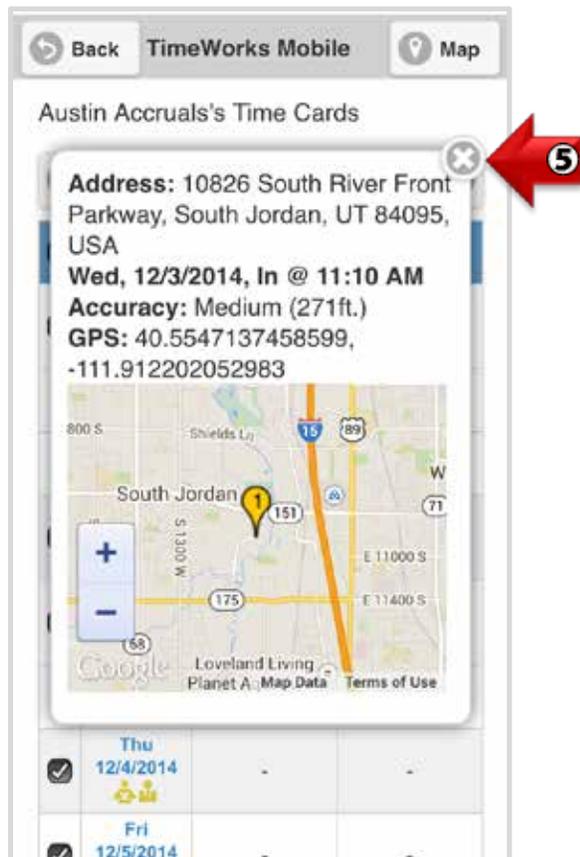
✓	Date	In	Out
✓	Mon 12/1/2014	8:02 AM	1:18 PM
		1:52 PM	4:01 PM
		-	-
✓	Tue 12/2/2014	-	-
✓	Wed 12/3/2014	11:10 AM	
		11:10 AM	Clocked In
✓	Thu 12/4/2014	-	-
✓	Fri 12/5/2014	-	-

TimeWorks Mobile

Pinpoint GPS View for the Client and Supervisor Continued

Step 5. To exit the Pinpoint GPS map tap on the (X) button located in the top right corner.

Note: You may also tap on the “Map” button located in the top right corner to access the Pinpoint GPS map.



Hosted VoiceClock

Hosted VoiceClock

Hosted VoiceClock is a telephone-enabled timekeeping collection device that provides timekeeping punch collection through the convenience of a phone line.

Whether your employees work remotely, are located temporarily off-site, or simply do not have access to a traditional time clock, VoiceClock enables employees to punch IN and OUT remotely; over the phone.

To access the VoiceClock you will need a phone number and company code. If you do not have either of these numbers, contact your timekeeping provider.

Employee Steps

Step 1. Using your telephone or mobile device enter the designated phone number to access the VoiceClock. If you do not have the phone number, contact your employer.

Step 2. You will be prompted to enter a four digit company code. If you do not have the company code contact your employer.

Step 3. You will be asked to enter your employee pin number followed by the pound (#) sign. If you are unsure of what the pin number is contact your employer.

Step 4. At this point you will be asked to select one of the following three options:

- To punch IN press “1”
- To Transfer press “2”
- To punch OUT press “3”

Punch IN: The system will give you the punch IN time.

Transfer: The Transfer option allows you to document labor data. For example, employer requirements to document each time you change departments during the work day. Use the Transfer option to enter the change or select from a list of options.

If prompts are not available the system will automatically punch you IN and give you the punch IN time.

Punch OUT: The system will give you the punch OUT time.

Once you have completed your selection you may hang up.

Time Clock Devices

How to Clock In on a Trans 330/380 Time Clock

Before you are able to clock IN/OUT on the time clock you will need to obtain either a time card or a PIN number from your supervisor, manager, or employer.

To Clock IN:

Step 1. To clock IN, Press the number “1” key.

Step 2. Swipe your time card, or manually key in your PIN number and press the blue “Enter” key. A beep will then sound and the clock will display “Clocked IN.” You are now clocked IN.



To Clock OUT:

Step 3. Press the number “2” key to clock OUT.

Step 4. Swipe your time card or manually key in your PIN number and press the blue “Enter” key. A beep will then sound and the clock will then display “Clocked OUT.” You are now clocked OUT.



Note: If you are unable to clock IN/OUT contact your supervisor or employer for assistance.

Time Clock Devices

How to Clock In on a Vx510 Time Clock

Before you are able to clock In/Out on the Vx510 time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Vx510 records a time (sometimes referred to as a 'punch') for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Press the number "1" key.

Note: If you press the wrong key while clocking IN, simply press the "X" key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success IN." The display screen will once again show the date and time.

TO CLOCK OUT:

Step 1. Press the number "2" key.

Note: If you press the wrong key while clocking OUT, simply press the "X" key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success OUT." The display screen will once again show the date and time.

Note: If you are unable to clock IN/OUT contact your supervisor, manager or employer for assistance.



Time Clock Devices

How to Clock In on a Vx510G Time Clock

Before you are able to clock In/Out on the Vx510G time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Vx510G records a time (sometimes referred to as a 'punch") for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Press the number "1" key.

Note: If you press the wrong key while clocking IN, simply press the "X" key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success IN." The display screen will once again show the date and time.

TO CLOCK OUT:

Step 1. Press the number "2" key.

Note: If you press the wrong key while clocking OUT, simply press the "X" key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success OUT." The display screen will once again show the date and time.

Note: If you are unable to clock IN/OUT contact your supervisor, manager or employer for assistance.



Time Clock Devices

How to Clock In on a Vx570 Time Clock

Before you are able to clock In/Out on the Vx570 time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Vx570 records a time (sometimes referred to as a ‘punch’) for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Press the number “1” key.

Note: If you press the wrong key while clocking IN, simply press the “X” key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press “OK.” A beep will then sound and the clock will display “Success IN.” The display screen will once again show the date and time.

TO CLOCK OUT:

Step 1. Press the number “2” key.

Note: If you press the wrong key while clocking OUT, simply press the “X” key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press “OK.” A beep will then sound and the clock will display “Success OUT.” The display screen will once again show the date and time.

Note: If you are unable to clock IN/OUT contact your supervisor, manager or employer for assistance.



Time Clock Devices

How to Clock In on a Vx610G Time Clock

Before you are able to clock In/Out on the Vx610G time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Vx610G records a time (sometimes referred to as a 'punch') for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Press the number "1" key.

Note: If you press the wrong key while clocking IN, simply press the "X" key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success IN." The display screen will once again show the date and time.

TO CLOCK OUT:

Step 1. Press the number "2" key.

Note: If you press the wrong key while clocking OUT, simply press the "X" key to cancel.

Step 2. Swipe your card on the right side of the time clock or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success OUT." The display screen will once again show the date and time.

Note: If you are unable to clock IN/OUT contact your supervisor, manager or employer for assistance.



Time Clock Devices

How to Clock In on a Z11 Time Clock

Before you are able to clock In/Out on the Z11 time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Z11 records a time (sometimes referred to as a 'punch') for an employee, it will need to know if the employee is clocking in or clocking out.

CLOCK IN:

Step 1. To clock IN, Press the number "1" key.

Note: If you press the wrong key while clocking IN, simply press the "X" key to cancel.



Step 2. Hold your proximity card or key fob in front of the Z11 time clock. A beep will then sound and the clock will display "Success IN." The display screen will once again show the date and time.



Proximity Card

Or manually input your employee PIN number and press the "OK" key. A beep will sound and the clock will display "Success IN." The display screen will once again show the date and time.



PIN Entry

Note: If you are unable to clock IN contact your supervisor, manager or employer for assistance.

Time Clock Devices

How to Clock In on a Z11 Time Clock (Continued)

CLOCK OUT:

Step 1. To clock “OUT” press the number “2” key.

Note: If you press the wrong key while clocking OUT, simply press the “X” key to cancel.



Step 2. Hold your proximity card or key fob in front of the Z11 time clock. A beep will then sound and the clock will display “Success OUT.” The display screen will once again show the date and time



Proximity Card

Or manually input your employee PIN number and press the “OK” key. A beep will sound and the clock will display “Success OUT.” The display screen will once again show the date and time.



PIN Entry

Note: If you are unable to clock OUT contact your supervisor, manager or employer for assistance.

Time Clock Devices

How to Clock In on a Z14 Magstripe Time Clock

Before you are able to clock In/Out on the Z14 time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Z14 records a time (sometimes referred to as a 'punch') for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Press the green "IN" button.

Note: If you press the wrong key while clocking IN, simply press the "X" key to cancel.

Step 2. Swipe your mag card on the right side of the time clock (see illustration 1.1) or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success IN." The display screen will once again show the date and time.



(Illustration 1.1)

TO CLOCK OUT:

Step 1. Press the red "OUT" button.

Note: If you press the wrong key while clocking OUT, simply press the "X" key to cancel.

Step 2. Swipe your mag card on the right side of the time clock (see illustration 1.1) or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success OUT." The display screen will once again show the date and time.

Note: If you are unable to clock IN/OUT contact your supervisor, manager or employer for assistance.

Time Clock Devices

How to Clock In on a Z14 Proximity Card Time Clock

Before you are able to clock In/Out on the Z14 time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Z14 records a time (sometimes referred to as a 'punch') for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Press the green "IN" button.

Note: If you press the wrong key while clocking IN, simply press the "X" key to cancel.

Step 2. Hold your proximity card or key fob in front of the word "Card" on Z14 time clock (see illustration 1.1), or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success IN." The display screen will once again show the date and time.



(Illustration 1.1)

TO CLOCK OUT:

Step 1. Press the red "OUT" button.

Note: If you press the wrong key while clocking OUT, simply press the "X" key to cancel.

Step 2. Hold your proximity card or key fob in front of the word "Card" on Z14 time clock (see illustration 1.1), or enter your PIN number on the key pad and press "OK." A beep will then sound and the clock will display "Success OUT." The display screen will once again show the date and time.

Note: If you are unable to clock IN/OUT contact your supervisor, manager or employer for assistance.

Time Clock Devices

How to Clock In on a Z18 Time Clock

Before you are able to clock In/Out on the Z18 time clock you will need to obtain either a time card or a Personal Identification Number (PIN) from your supervisor, manager, or employer. When the Z18 records a time (sometimes referred to as a ‘punch’) for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Press the number “1” key.

Note: If you press the wrong key while clocking IN, simply press the “X” key to cancel.

Step 2. Enter your PIN number on the key pad and press “OK.” A beep will then sound and the clock will display “Success IN.” The display screen will once again show the date and time.



(Illustration 1.1)

TO CLOCK OUT:

Step 1. Press the number “2” key.

Note: If you press the wrong key while clocking OUT, simply press the “X” key to cancel.

Step 2. Enter your PIN number on the key pad and press “OK.” A beep will then sound and the clock will display “Success OUT.” The display screen will once again show the date and time.

Note: If you are unable to clock IN/OUT contact your supervisor, manager or employer for assistance.

Time Clock Devices

How to Clock In on a Z33 or Z34 Time Clock

Before you are able to clock In/Out on the Z33 or Z34 time clock you will need to obtain a Personal Identification Number (PIN) along with having your fingerprint enrolled on the time clock by your supervisor, manager, or other designated individual. When the Z33/Z34 records a time (sometimes referred to as a ‘punch’) for an employee, it will need to know if the employee is clocking in or clocking out.

CLOCK IN:

Step 1. To clock “IN” press the number “1” key. See (illustration 1.1).

Step 2. Enter your PIN number and press “Ok.” (If you are not required to enter one, skip this step).

Step 3. Touch the fingerprint sensor using the same finger you enrolled with. A beep will sound letting you know you are clocked “IN.” The display screen will display “Success IN,” and return to showing the date and time.



(Illustration 1.1)

CLOCK OUT:

Step 1. To clock “OUT” press the number “2” key. See (illustration 1.1).

Step 2. Enter your PIN number and press “Ok.” (If you are not required to enter one, skip this step).

Step 3. Touch the fingerprint sensor using the same finger you enrolled with. A beep will sound letting you know you are clocked “OUT.” The display screen will display “Success OUT,” and return to showing the date and time.

Note: If you are unable to clock In/Out contact your supervisor, manager, or other designated individual for assistance.

Time Clock Devices

How to Clock In on a GT-400 Time Clock

Before you are able to clock In/Out on the GT-400 time clock you will need to obtain a Personal Identification Number (PIN) along with having your handprint enrolled on the time clock by your supervisor, manager, or other designated individual. When the GT-400 records a time (sometimes referred to as a “punch”) for an employee, it will need to know if the employee is clocking in or clocking out.

CLOCK IN:

Step 1. To clock “IN” press the number “1” key.

Step 2. Enter your PIN number on the keypad and press “Enter.”

Step 3. Place your hand over the outline of the handprint on the time clock with each finger touching one of the five sensors. The hand icon, located on the right side of the keypad will display a red light which corresponds with each sensor. When the correct fingers are touching the correct sensors the red lights will turn off and a beep will sound letting you know you are clocked “IN.” The display screen will display “Success IN,” and return to showing the date and time.



CLOCK OUT:

Step 1. To clock “OUT” press the number “2” key.

Step 2. Enter your PIN number on the keypad and press “Enter.”

Step 3. Place your hand over the outline of the handprint on the time clock with each finger touching one of the five sensors. The hand icon, located on the right side of the keypad will display a red light which corresponds with each sensor. When the correct fingers are touching the correct sensors the red lights will turn off and a beep will sound letting you know you are clocked “OUT.” The display screen will display “Success OUT,” and return to showing the date and time.

Note: If you are unable to clock In/Out contact your supervisor, manager, or other designated individual for assistance.

Time Clock Devices

How to Clock In on a WebClock

Before you are able to clock In/Out on the WebClock you will need to obtain an “Employee Login ID” and “Password” from your supervisor, manager, or employer. When the WebClock records a time (sometimes referred to as a ‘punch’) for an employee, it will need to know if the employee is clocking in or clocking out.

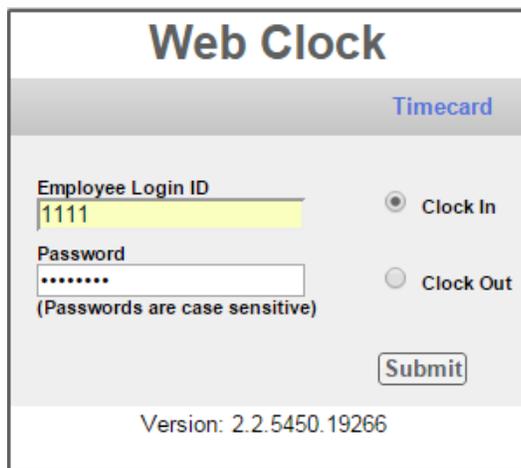
TO CLOCK IN:

Step 1. Enter your login ID in the “Employee Login ID” field. (See illustration 1.1).

Step 2. Enter your password in the “Password” field.

Step 3. Click the radio button for “Clock In.”

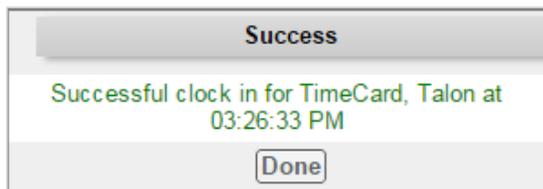
Step 4. Click the “Submit” button.



The screenshot shows a web interface titled "Web Clock" with a "Timecard" tab. It features two input fields: "Employee Login ID" containing the number "1111" and "Password" containing seven asterisks. Below the password field is the text "(Passwords are case sensitive)". To the right of the input fields are two radio buttons: "Clock In" (which is selected) and "Clock Out". A "Submit" button is located below the radio buttons. At the bottom of the form, the text "Version: 2.2.5450.19266" is displayed.

(Illustration 1.1)

Step 5. A window will display letting you know the clock “IN” was a success (see illustration 1.2). Click “Done” to exit.



The screenshot shows a "Success" message window. The title bar says "Success". The main text reads "Successful clock in for TimeCard, Talon at 03:26:33 PM". A "Done" button is located at the bottom of the window.

(Illustration 1.2)

Time Clock Devices

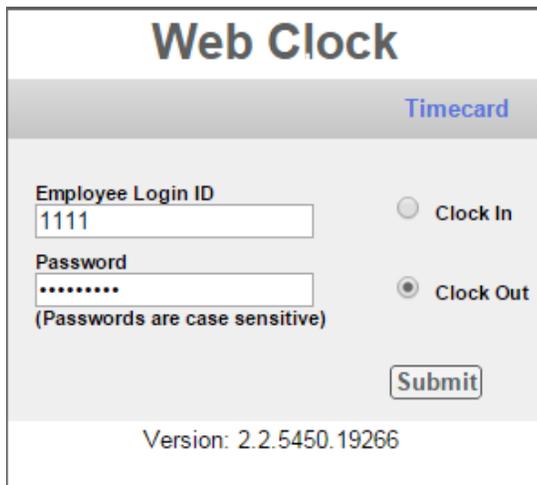
How to Clock Out on a WebClock

Step 1. Enter your login ID in the “Employee Login ID” field. (See illustration 1.3).

Step 2. Enter your password in the “Password” field.

Step 3. Click the radio button for “Clock Out.”

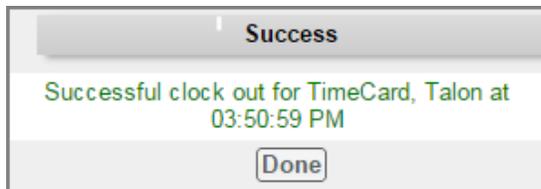
Step 4. Click the “Submit” button.



The screenshot shows a web interface titled "Web Clock" with a sub-header "Timecard". It features two input fields: "Employee Login ID" with the value "1111" and "Password" with masked characters "*****". Below the password field is the text "(Passwords are case sensitive)". To the right of the input fields are two radio buttons: "Clock In" (unselected) and "Clock Out" (selected). A "Submit" button is located below the radio buttons. At the bottom of the interface, the version number "Version: 2.2.5450.19266" is displayed.

(Illustration 1.3)

Step 5. A window will display letting you know the clock “OUT” was a success (see illustration 1.4). Click “Done” to exit.



(Illustration 1.4)

Note: If you are unable to clock IN/OUT contact your supervisor, manager, or employer for assistance.

Time Clock Devices

How to Clock In on TimeWorks Mobile

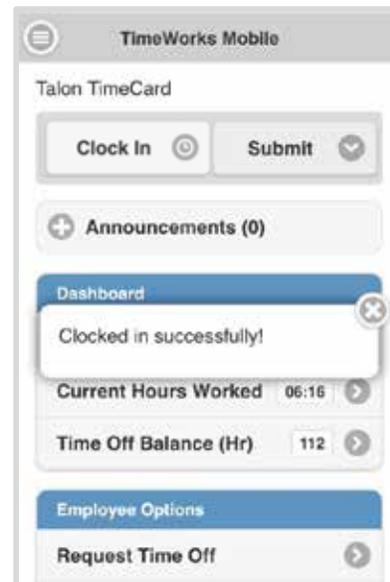
Before you are able to clock In/Out on TimeWorks Mobile you will need to obtain a Login ID and Password from your supervisor, manager, or employer. When TimeWorks Mobile records a time (sometimes referred to as a 'punch') for an employee, it will need to know if the employee is clocking in or clocking out.

TO CLOCK IN:

Step 1. Log onto your TimeWorks Mobile app.

Step 2. Tap on the clock button making sure it reads "Clock In."

Step 3. Tap "Submit." A window will then display stating "Clocked in successfully" (see illustration 1.1).



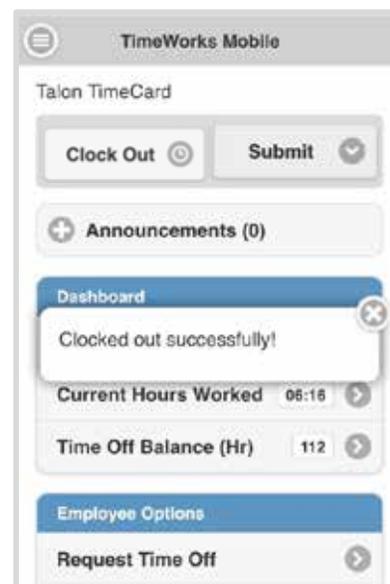
(Illustration 1.1)

TO CLOCK OUT:

Step 1. Log onto your TimeWorks Mobile app.

Step 2. Tap on the clock button making sure it reads "Clock Out."

Step 3. Tap "Submit." A window will then display stating "Clocked out successfully" (see illustration 1.2).



(Illustration 1.2)

