# Timekeeping User Manual

# Timekeeping User's Manual Table of Conents

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 time-keeping 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!

## Timekeeping User's Manual

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# Sites

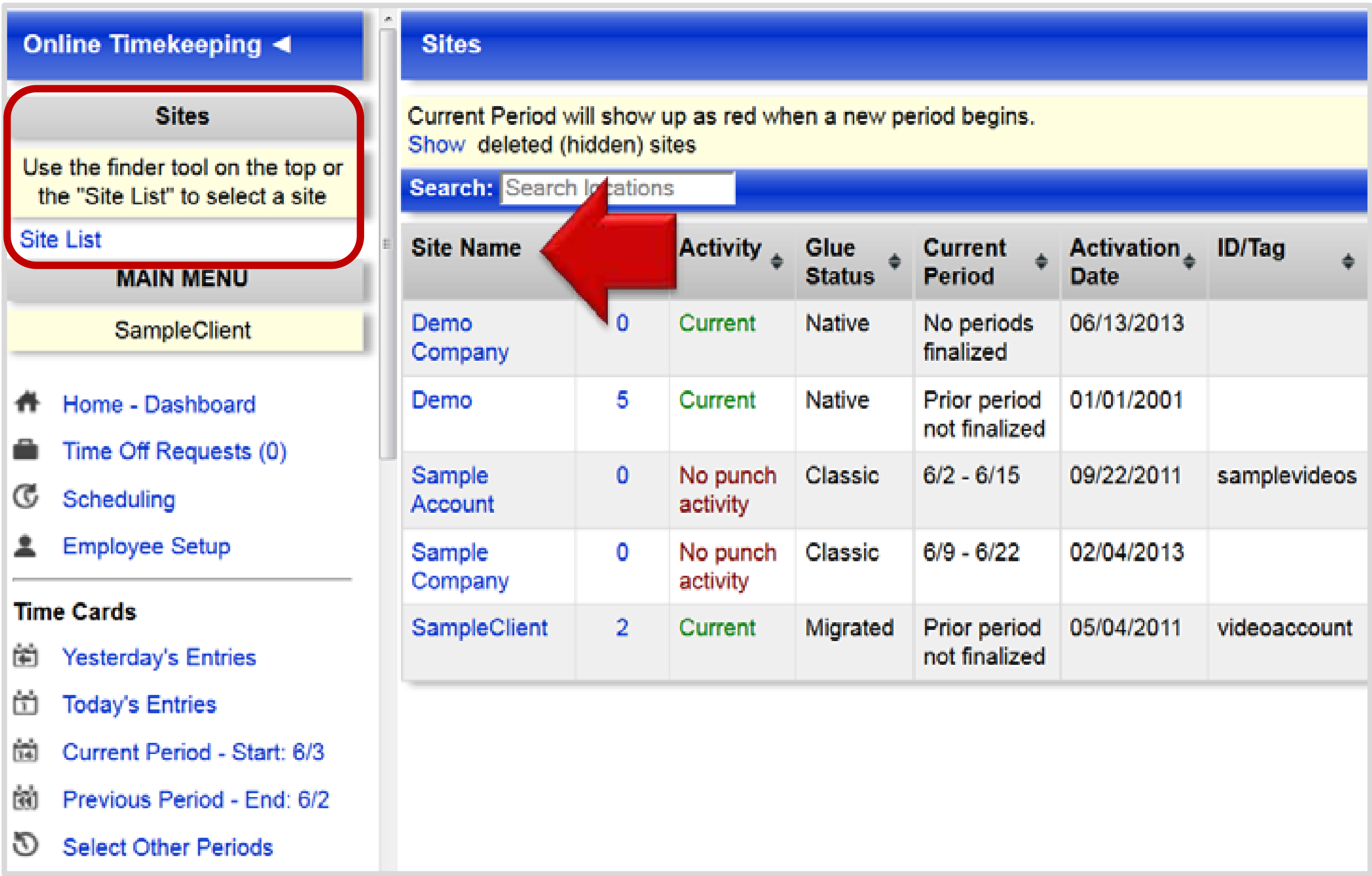
## Site List — Multiple Site Management

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.




**Note:** The "Summary Report" also allows for reporting on multiple sites.

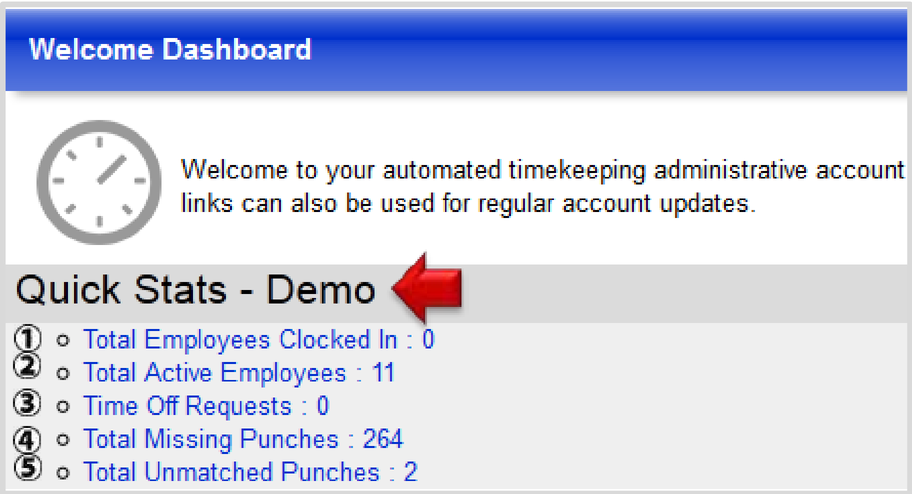
# Main Menu

## 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.”



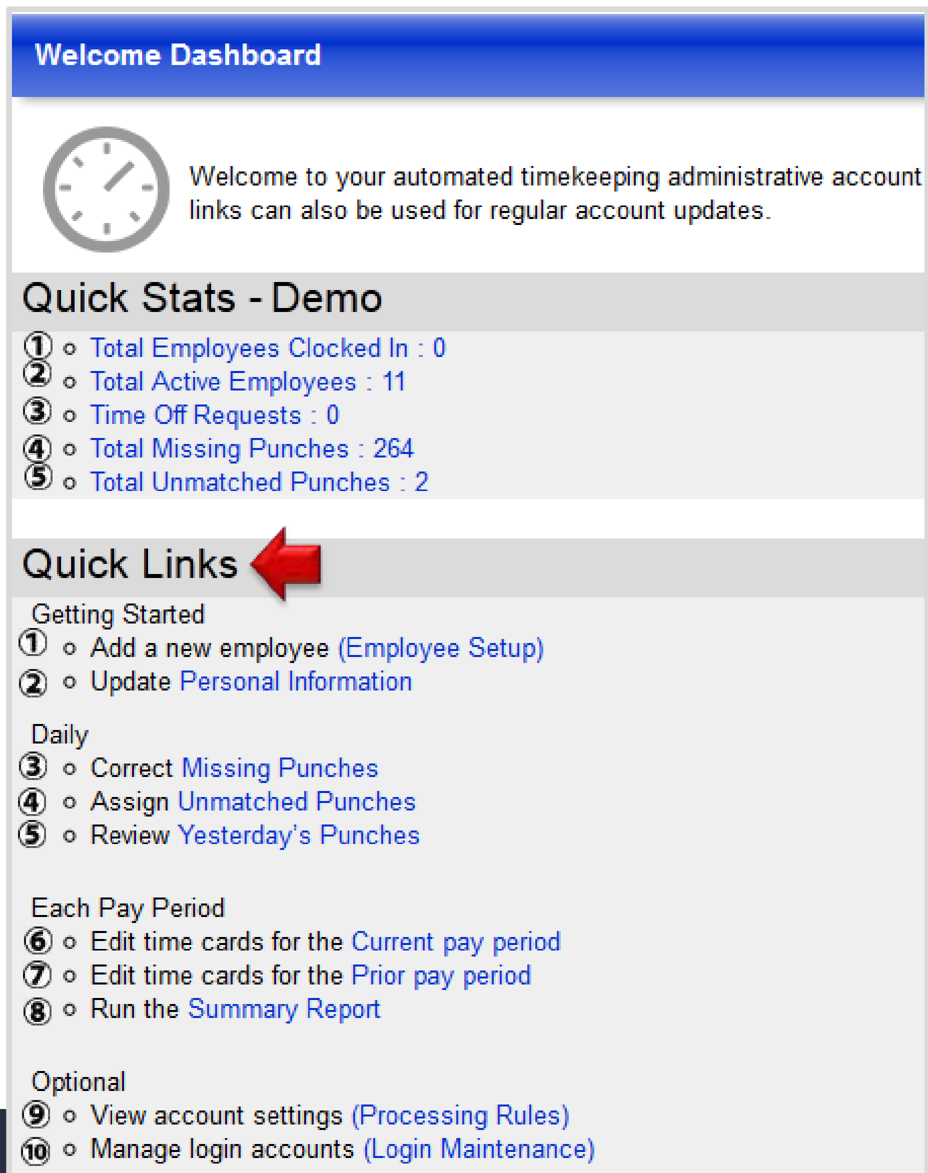

**Quick Links:**

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.

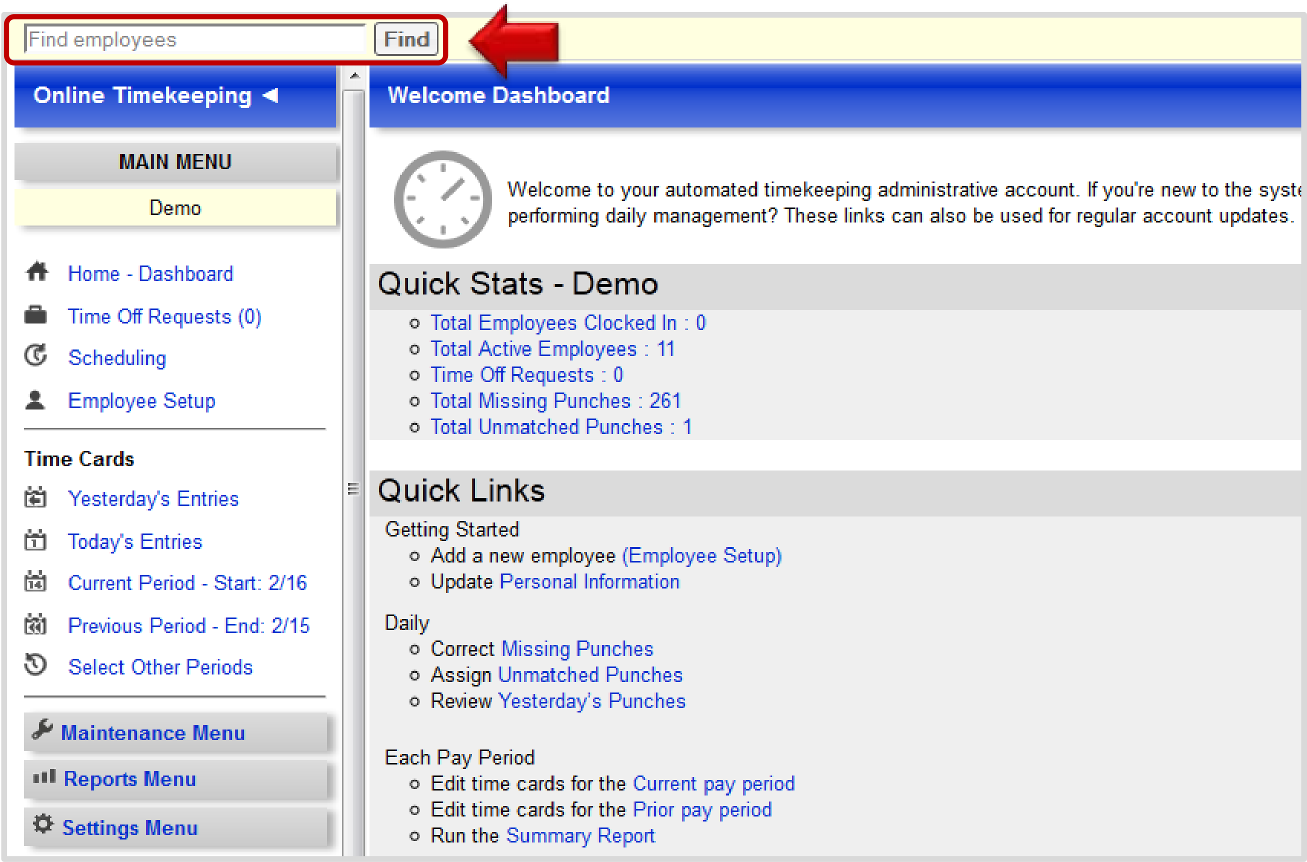


# Main Menu

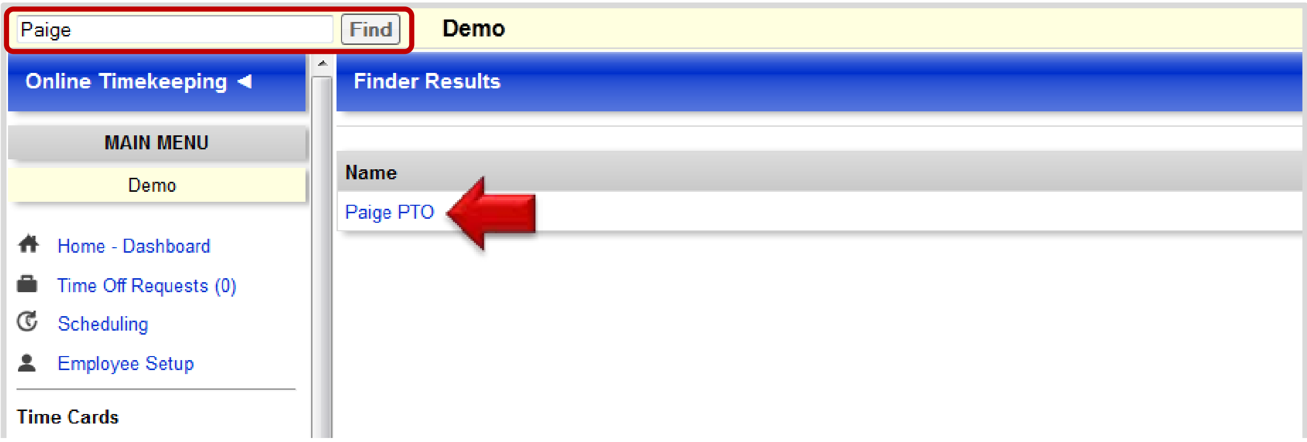
## Find Employees

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.

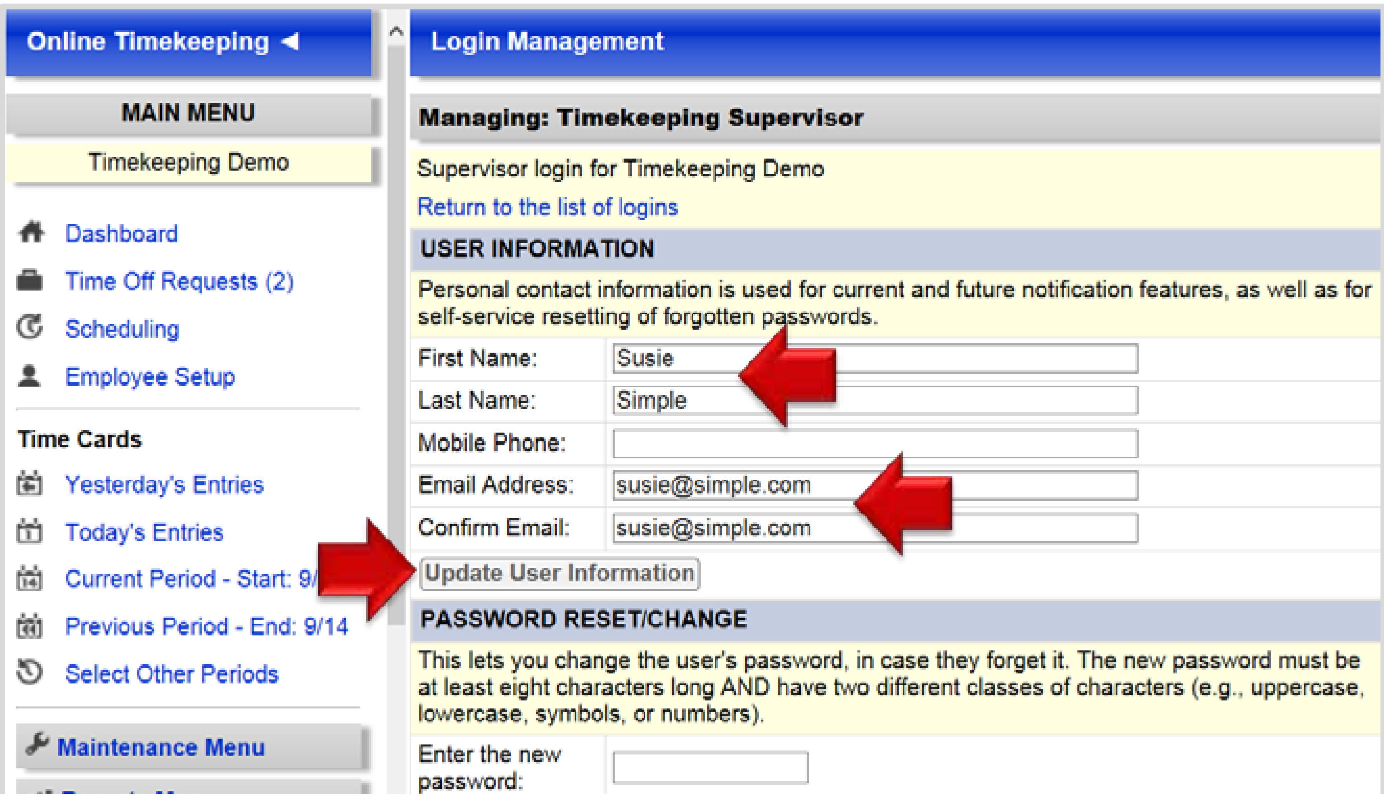
### Employer Steps:

**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.



## 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."

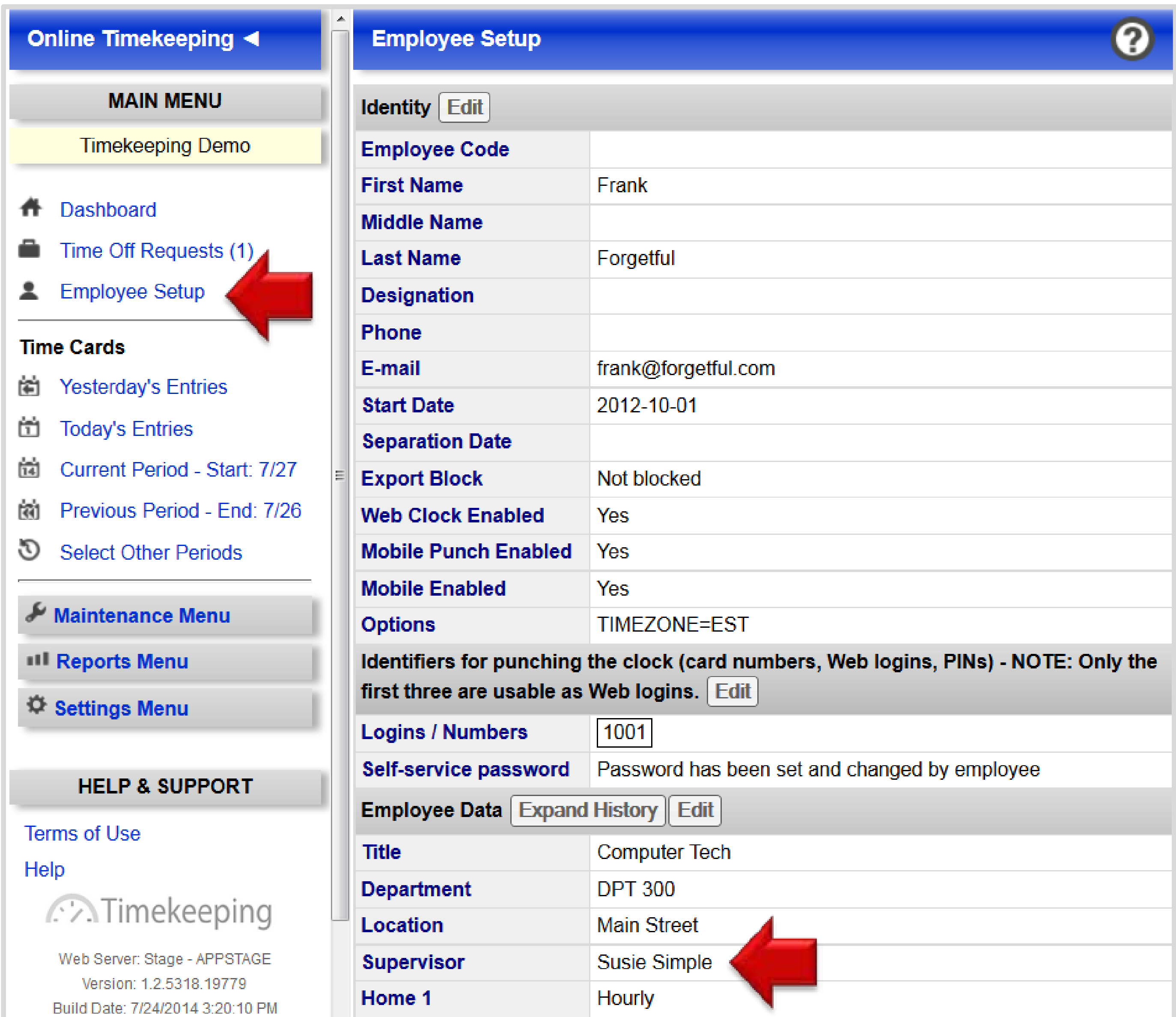
**Step 1.** From the "Main Menu" select "Employee Setup."

**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."



## 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.

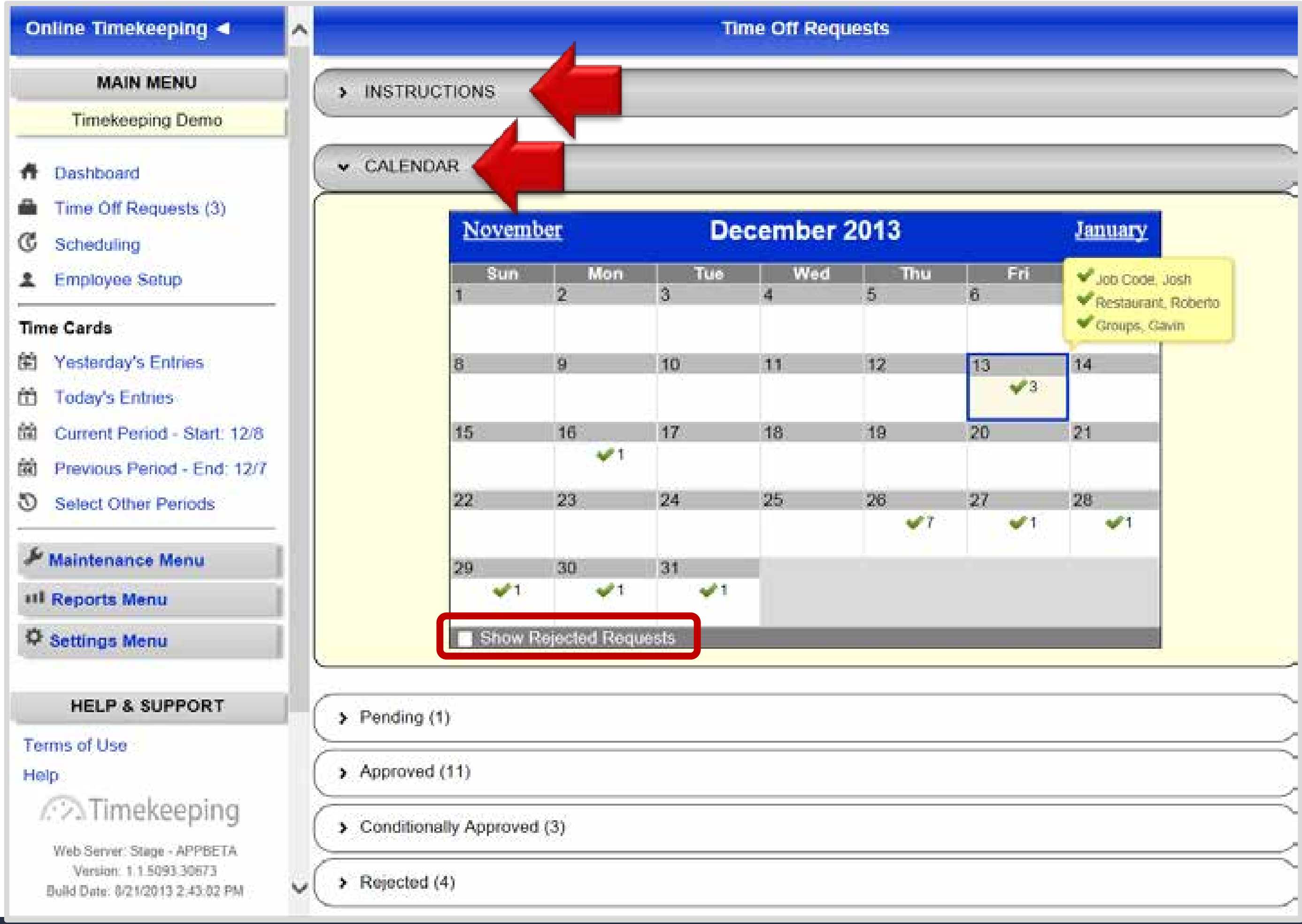
**Note:** The yellow triangle gives a warning that another employee in the same department has been approved for the same time off. Hover over the triangle for employee’s name and to see the dates requested.

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.

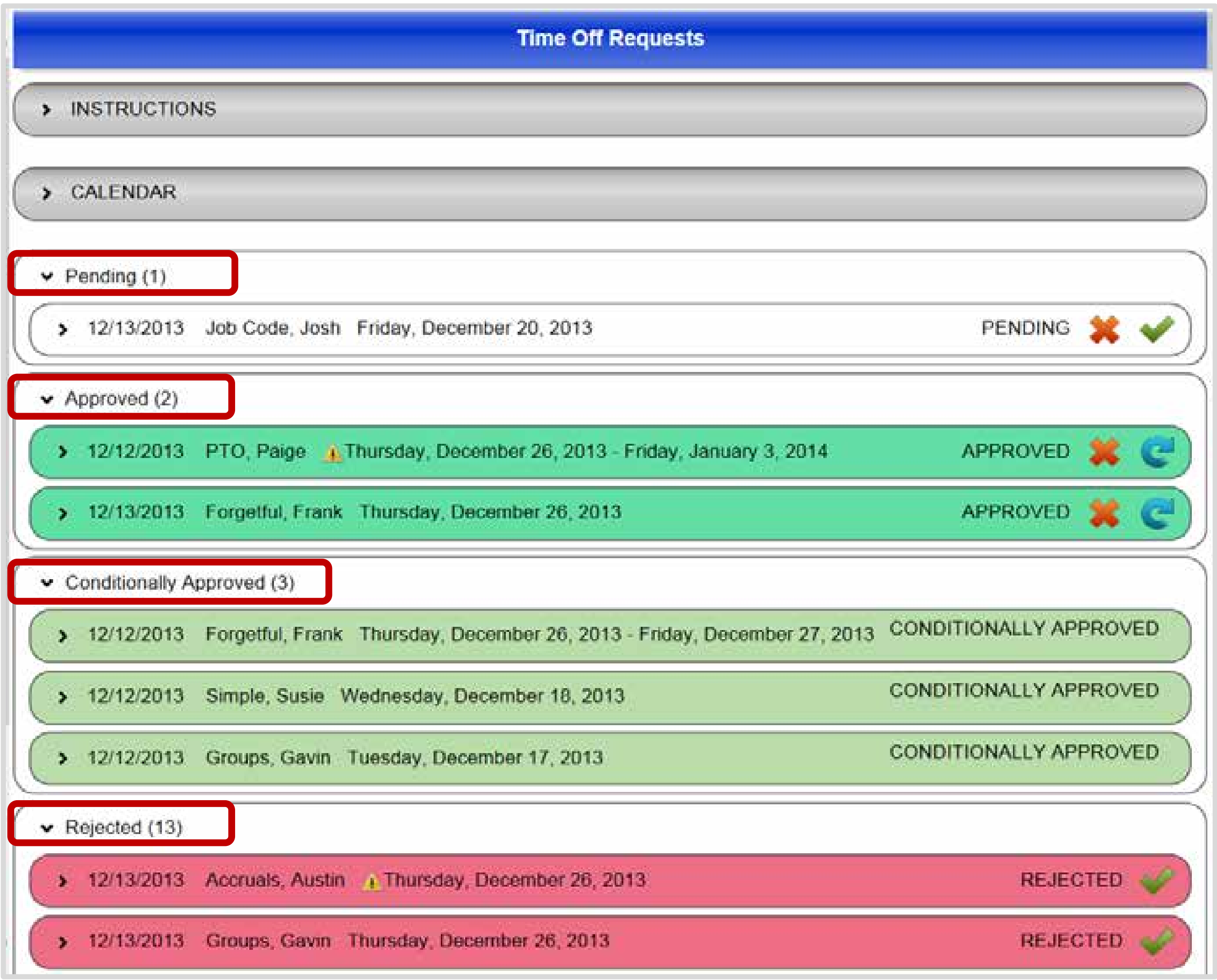
To view requests that have been rejected, check the box found in bottom left corner of the calendar “Show Rejected Requests.”

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



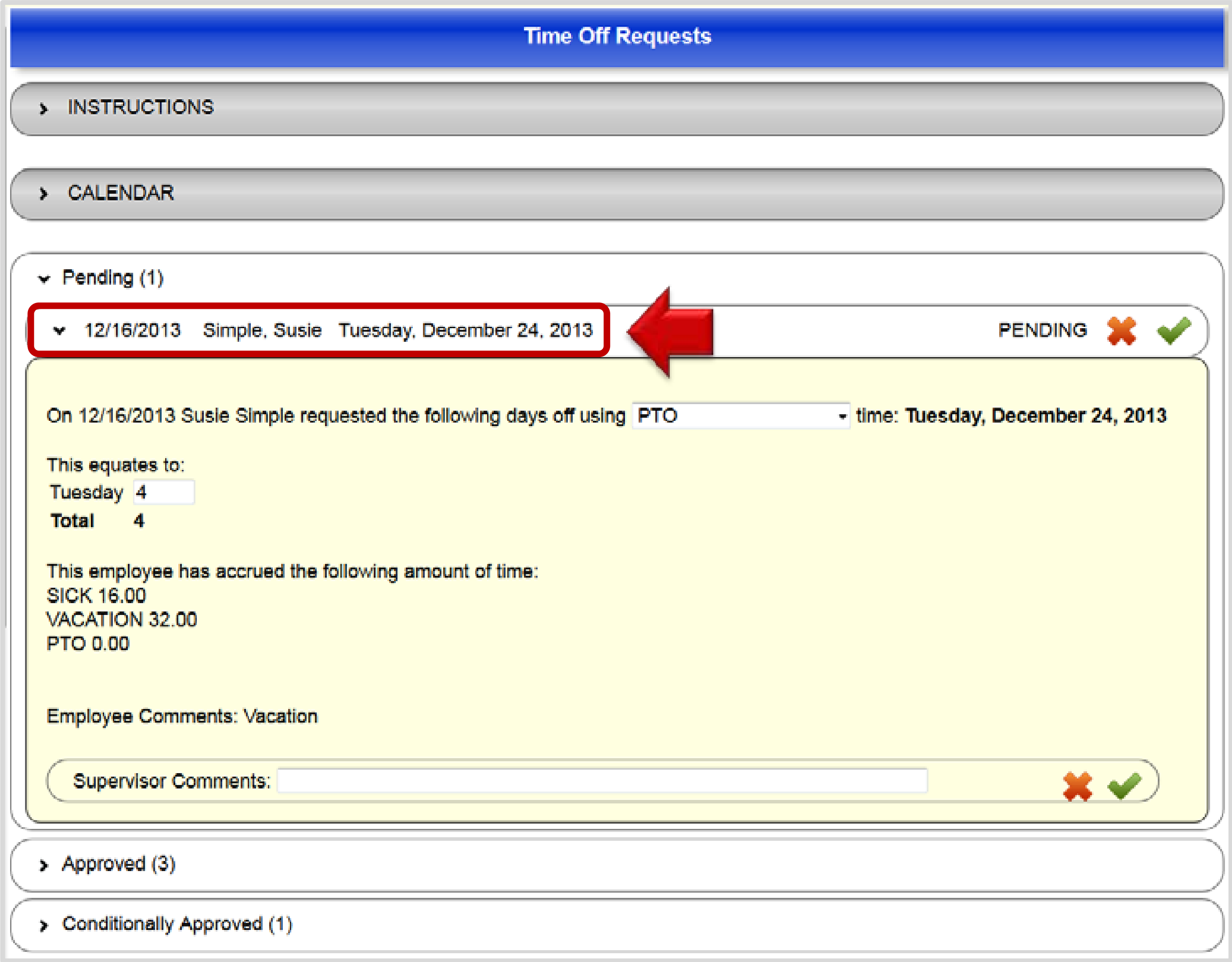
## Time-off Requests - Employer or Supervisor View

**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 - 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.



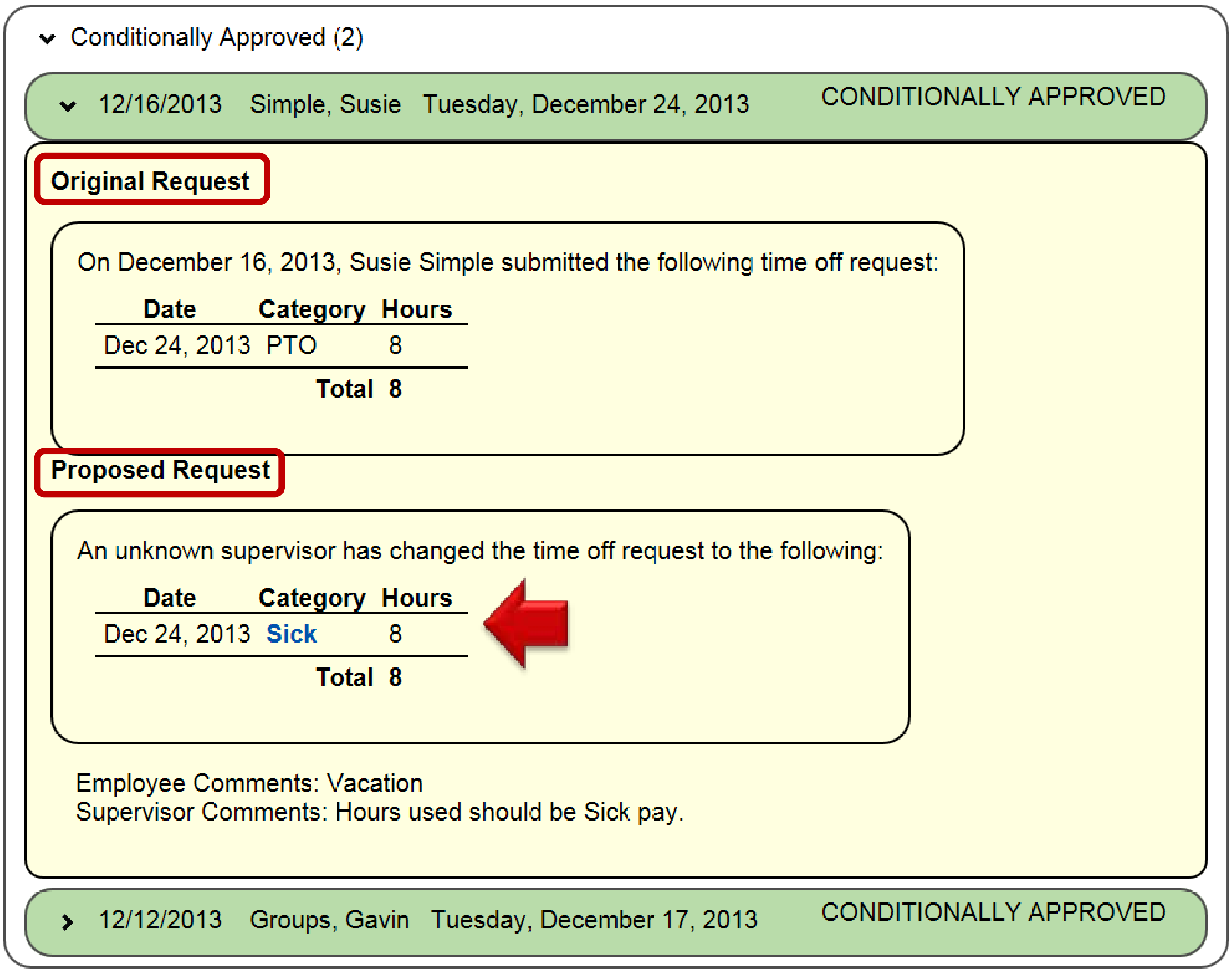

**Note:** To remove previously "Approved" and "Rejected" requests from displaying on this list, finalize the pay periods up to the current period from the "Finalized Pay Period" link. The request history can be accessed through the "Time Off Requests Report" or by un-finalizing pay periods.

## 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 “Conditioanlly 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.



## Time-off Requests - Employer or Supervisor Changes

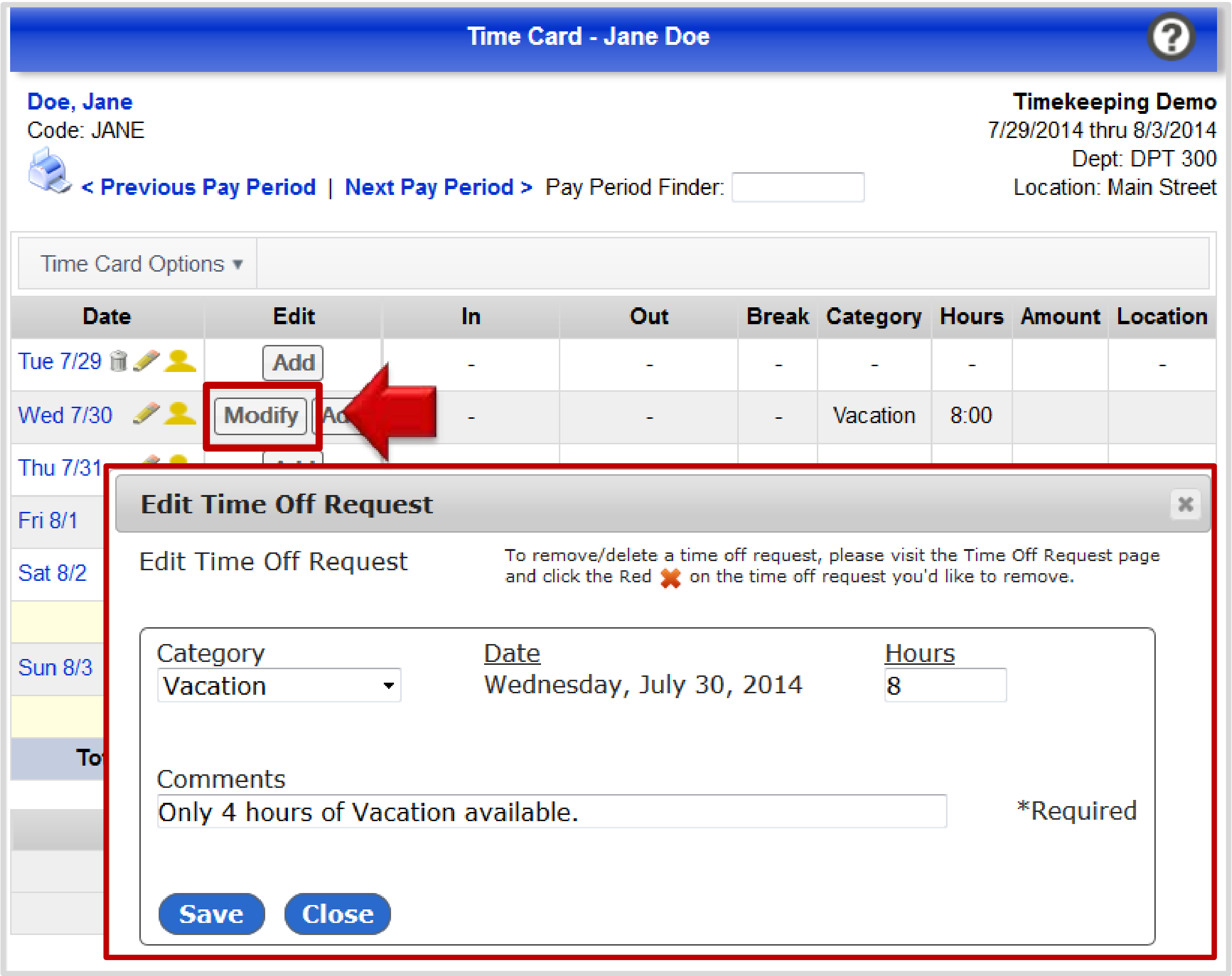
### Changing an approved "Time off Request:"

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."

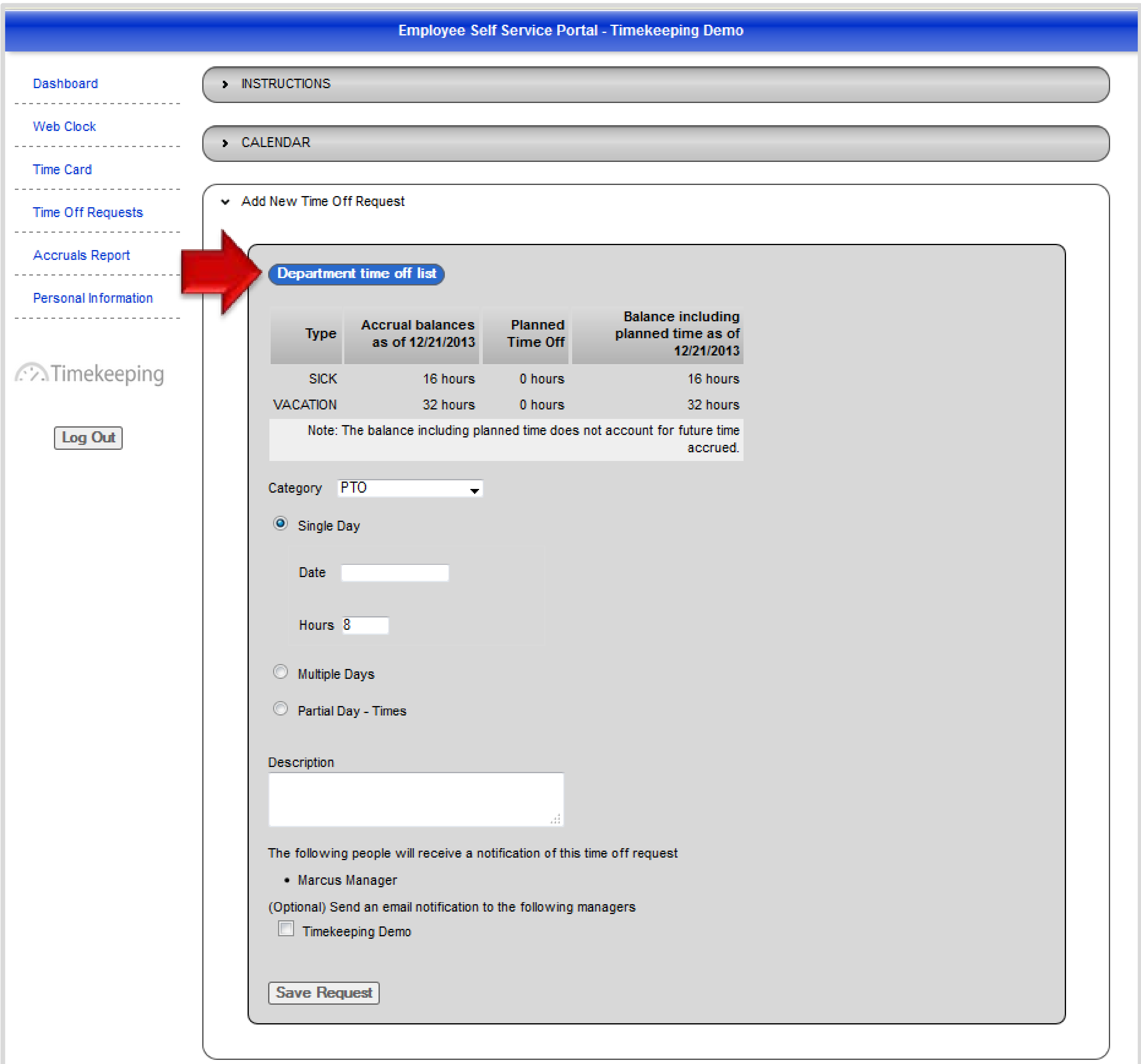


# Main Menu

## 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.

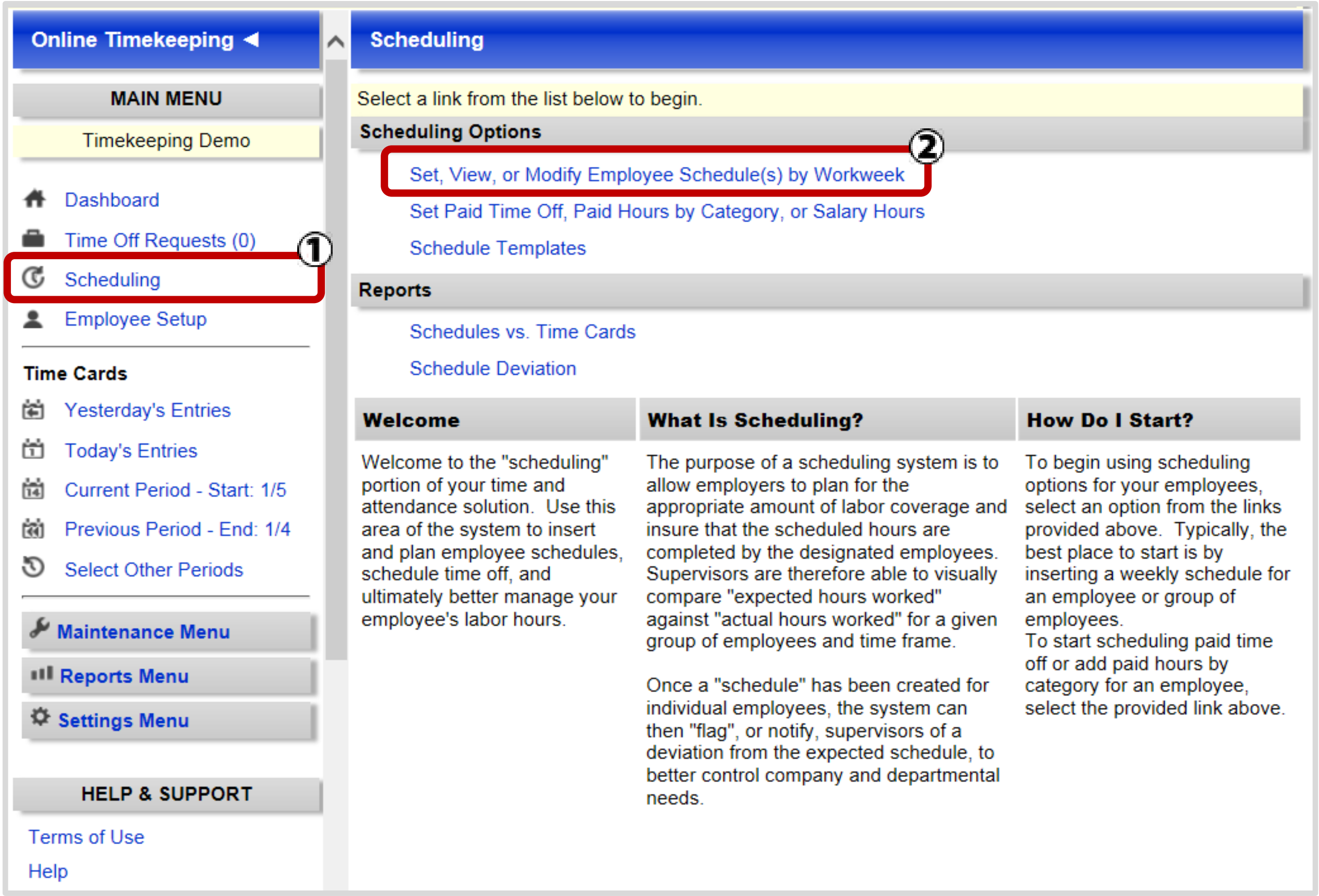


## Scheduling - Create a Schedule

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.

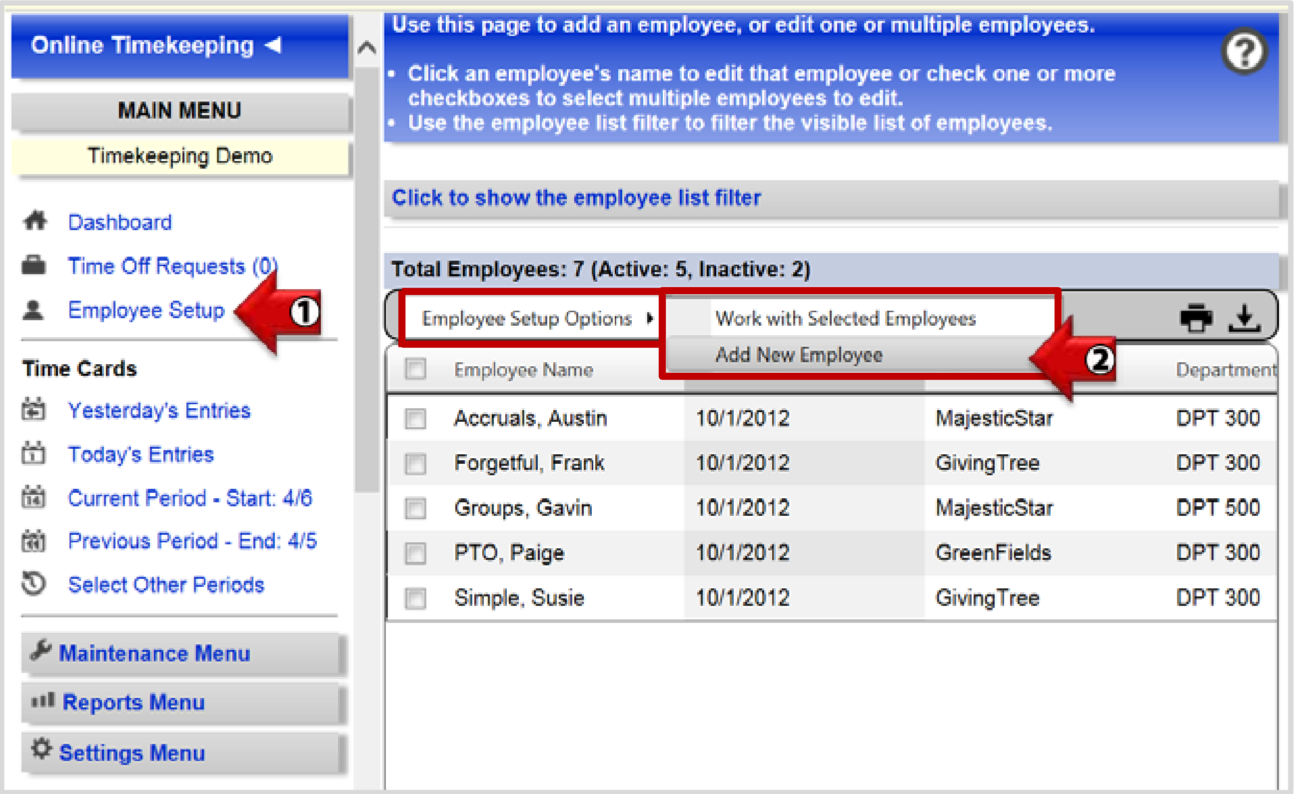


# Employee Setup - Add New Employee

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.

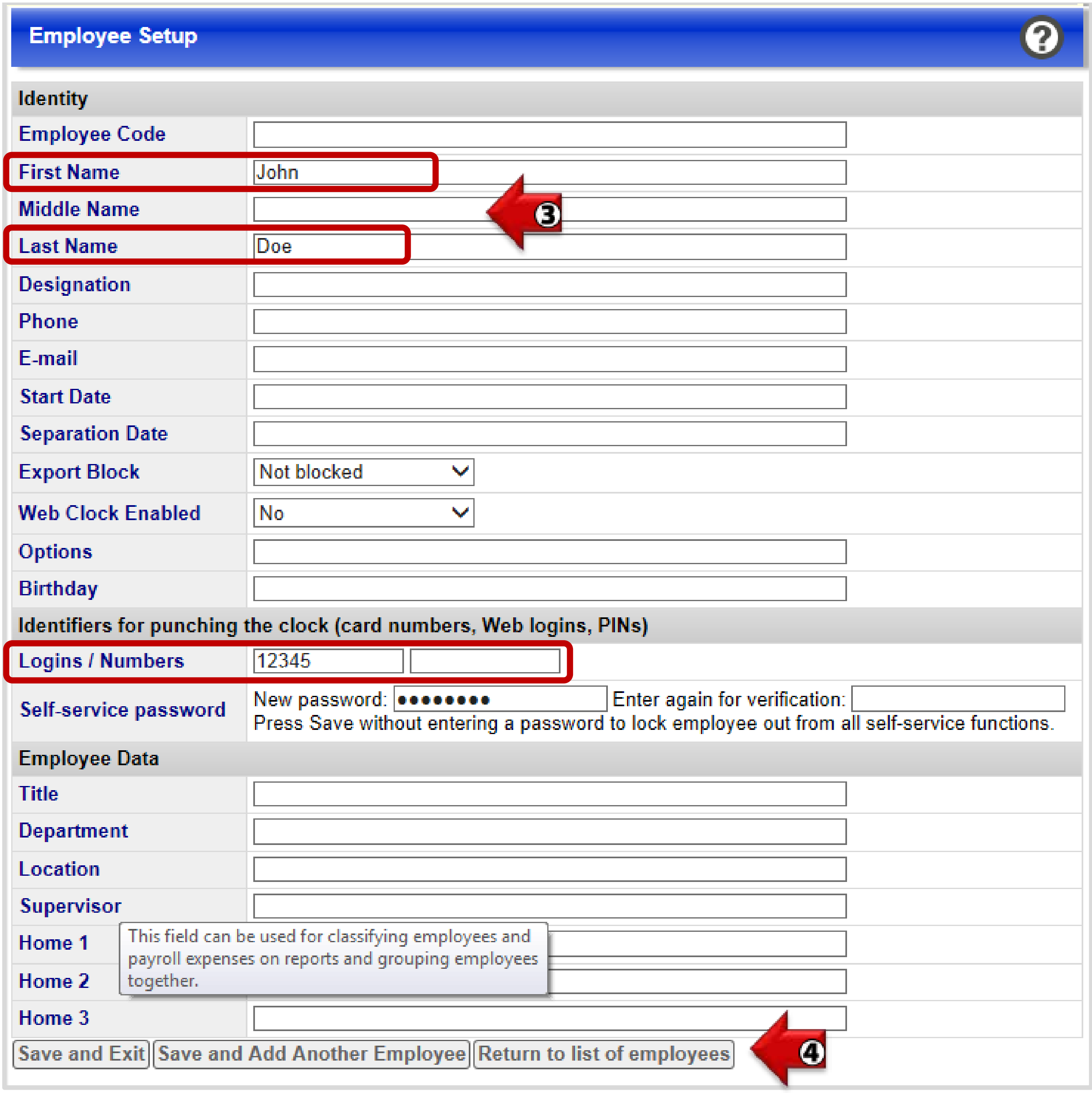
**Step 2.** Select “Add New Employee” found in the “Employee Setup Options” list.




**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.

## Employee Setup  - Add New Employee Continued



## 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.”


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

## 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.

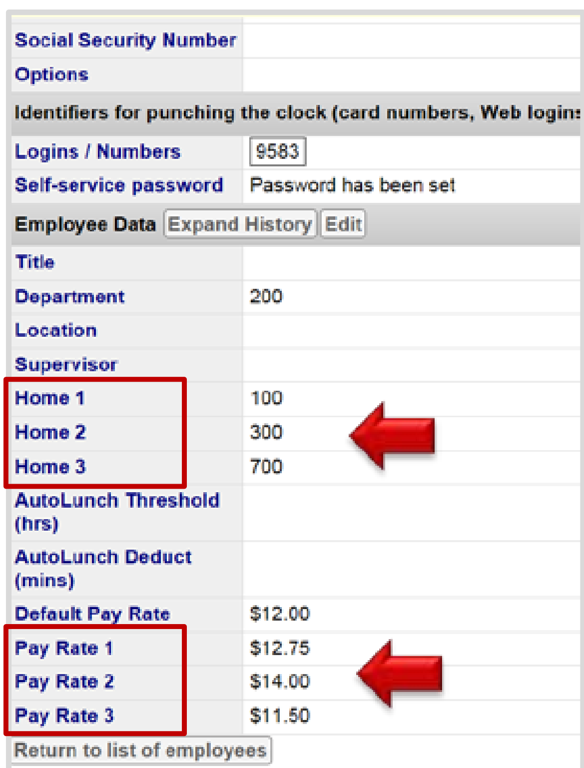
**Step 2.** Entering additional pay rates is accomplished in an employee's personal setup file. To access the file, click on the “Employee Setup” link from the “Main Menu”.

**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.



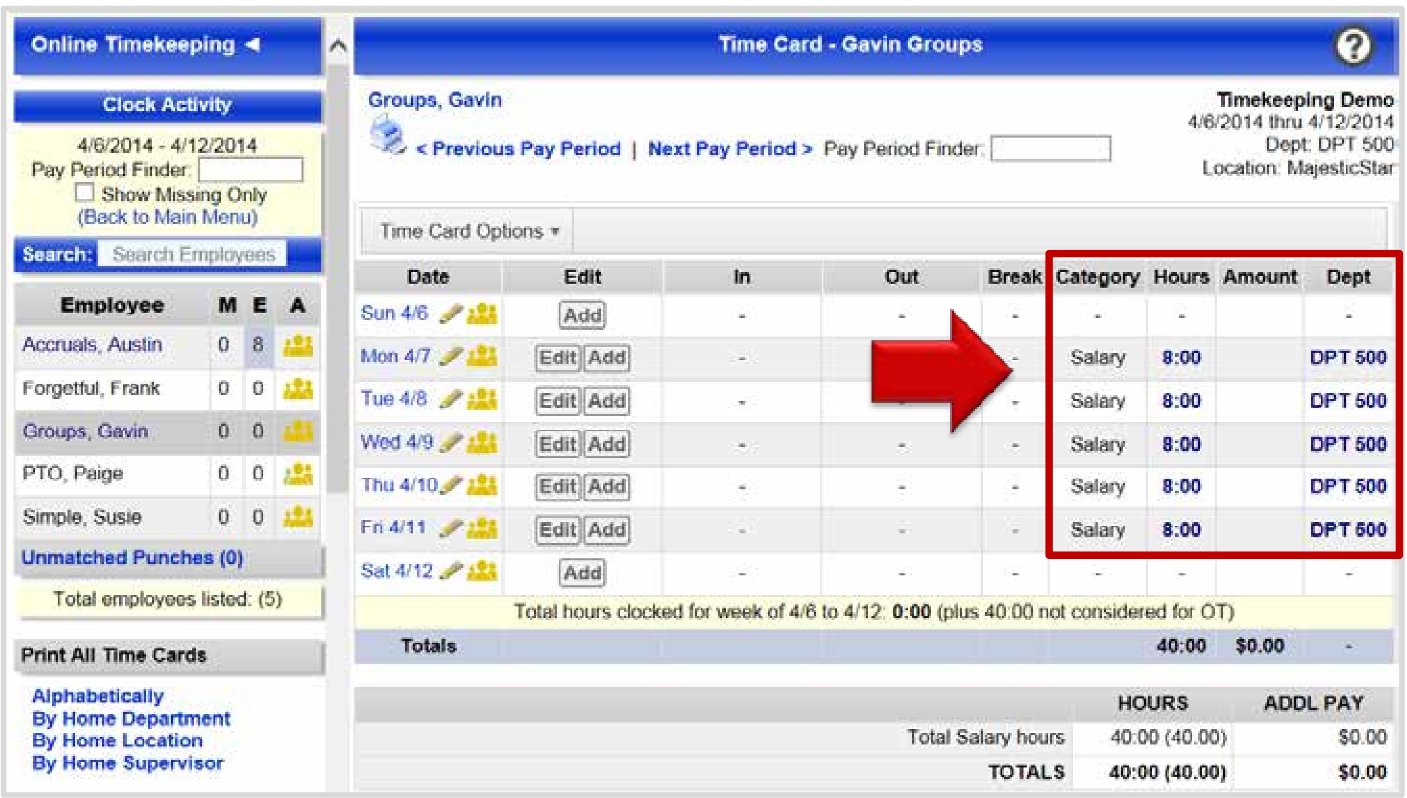
## Employee Setup - Auto Add Hours

“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.



## Employee Setup - Auto-Lunch Deduction

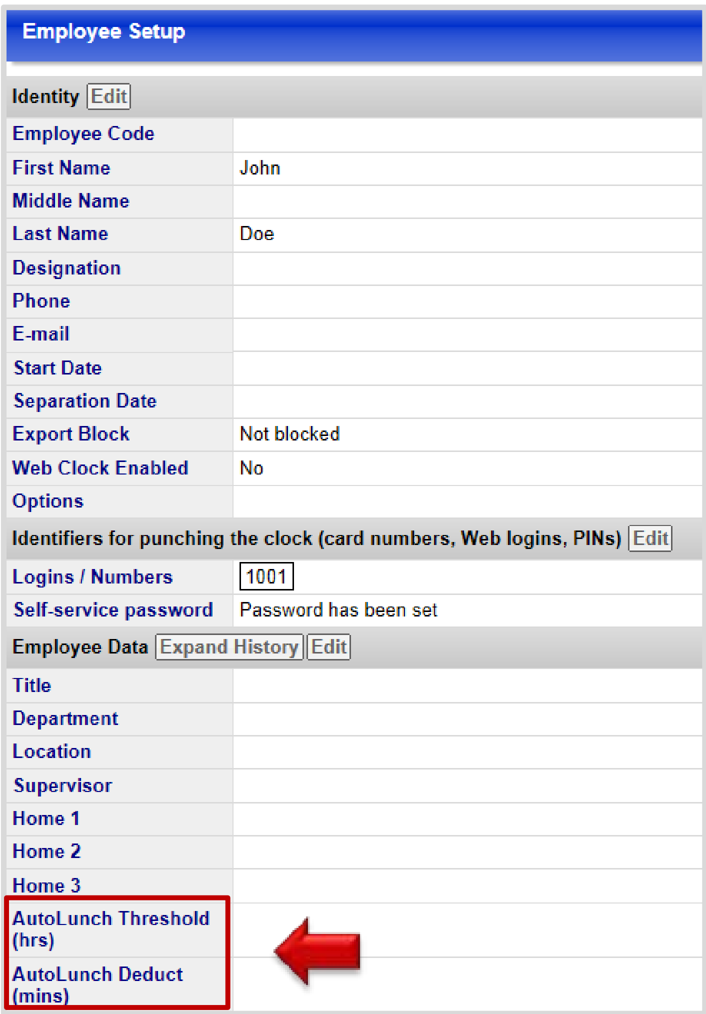
Assigning an Auto-Lunch Deduction will activate an automatic deduction of desired minutes from an employee's time card after a specified amount of consecutive hours have been worked.

**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 - 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"**

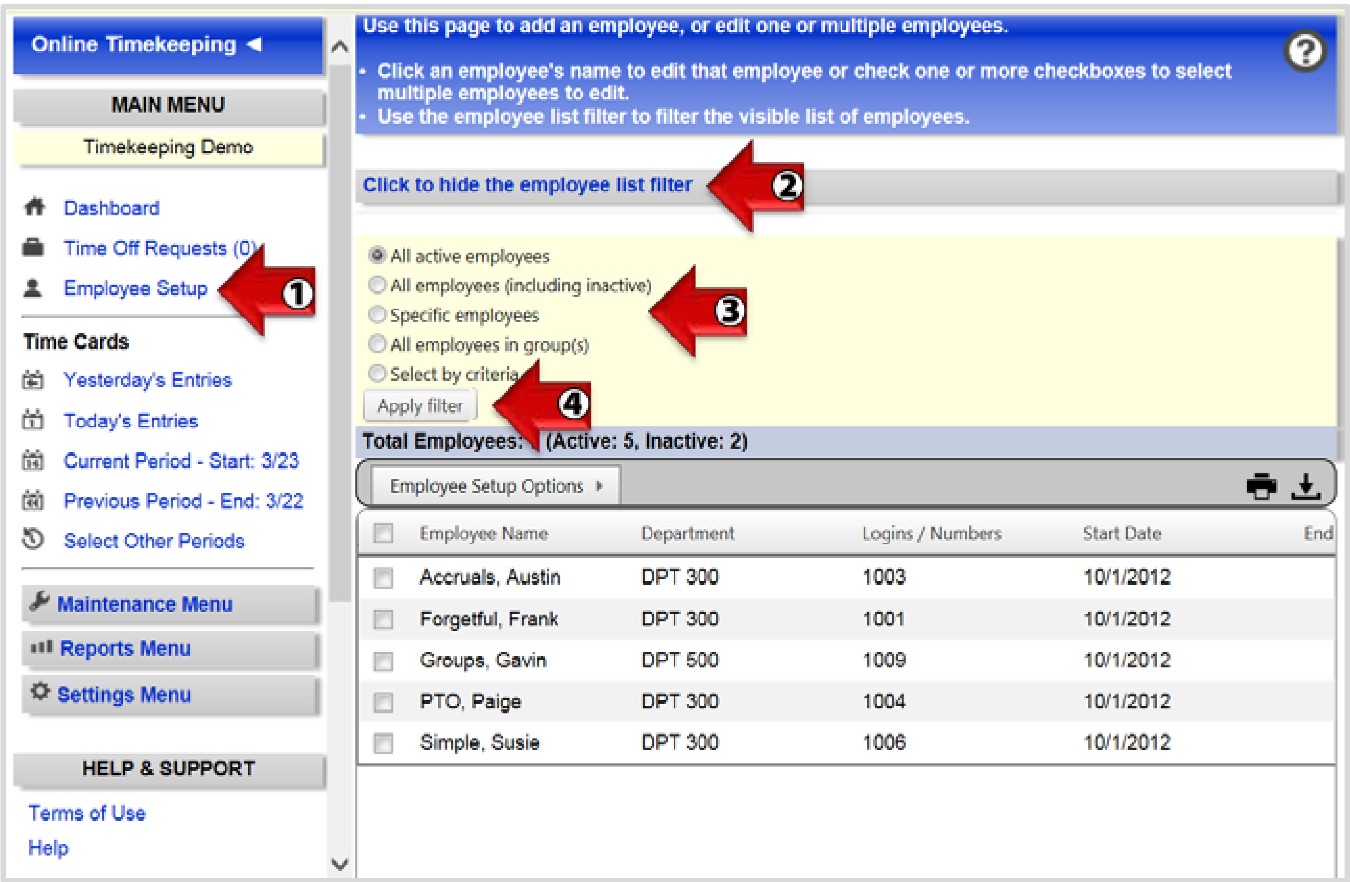
**Step 1.** Select "Employee Setup" found in the "Main Menu."

**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.



## Employee Setup - Employee-Specific Time Zones

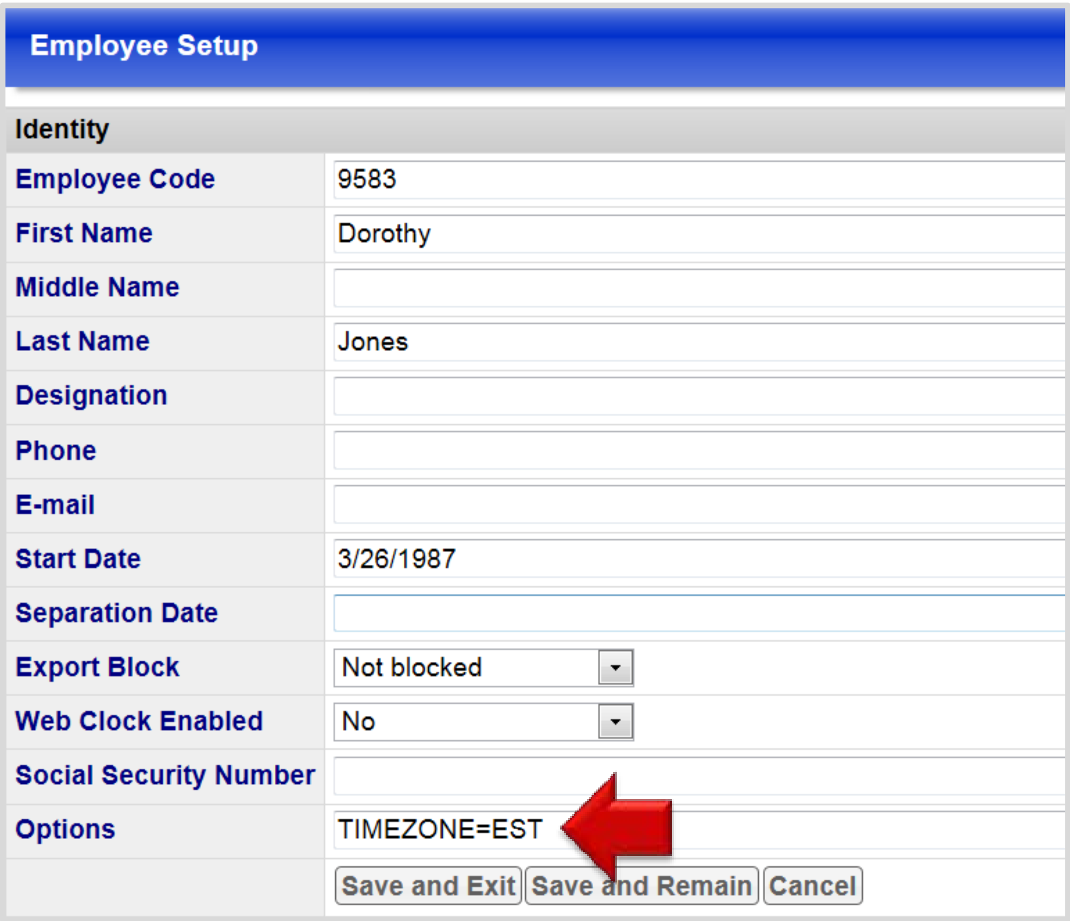
Employee Specific Time Zones are sometimes necessary if one company has multiple locations that fall across multiple time zones. For example, once location may be in California and another in Idaho. It is recommended to set the company time zone to the majority and then the employee specific time zone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

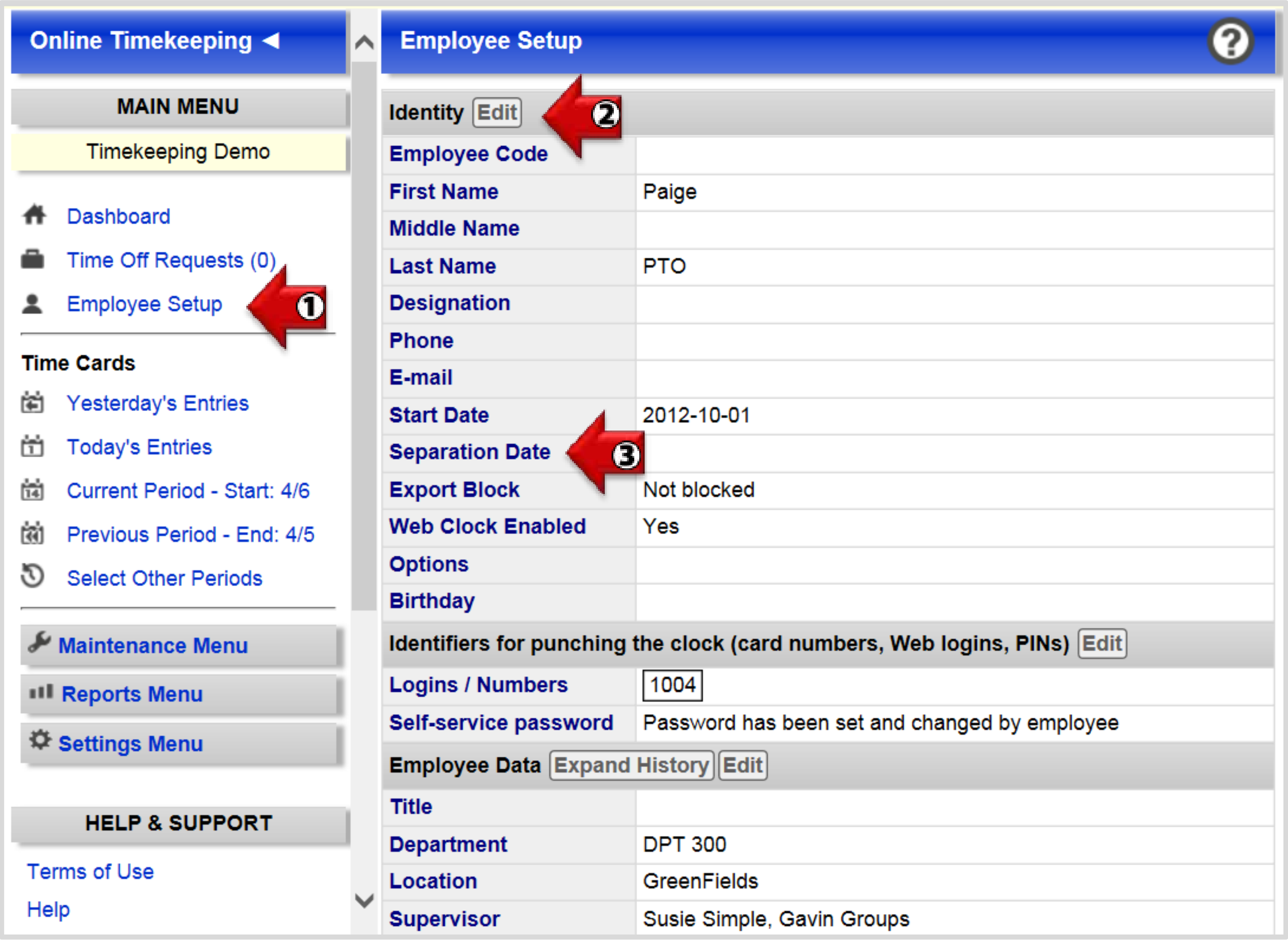
Employees are typically set to inactive when an employee is terminated from the company. The employee will not be purged from the timekeeping system but will be hidden from areas of the system such as Time Cards.

**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."




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

# Main Menu

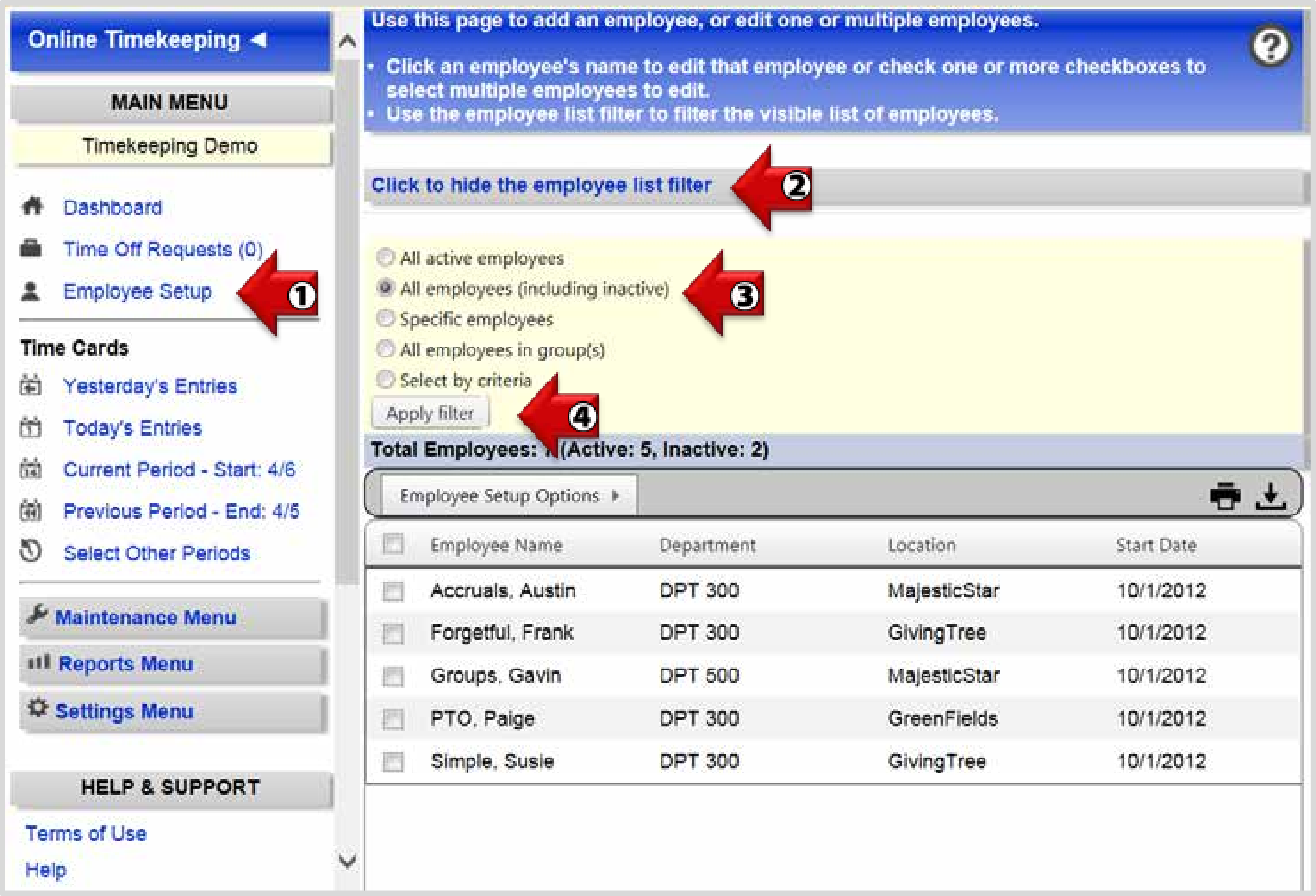
## Employee Setup  - View Inactive Employees

**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.”



# Main Menu

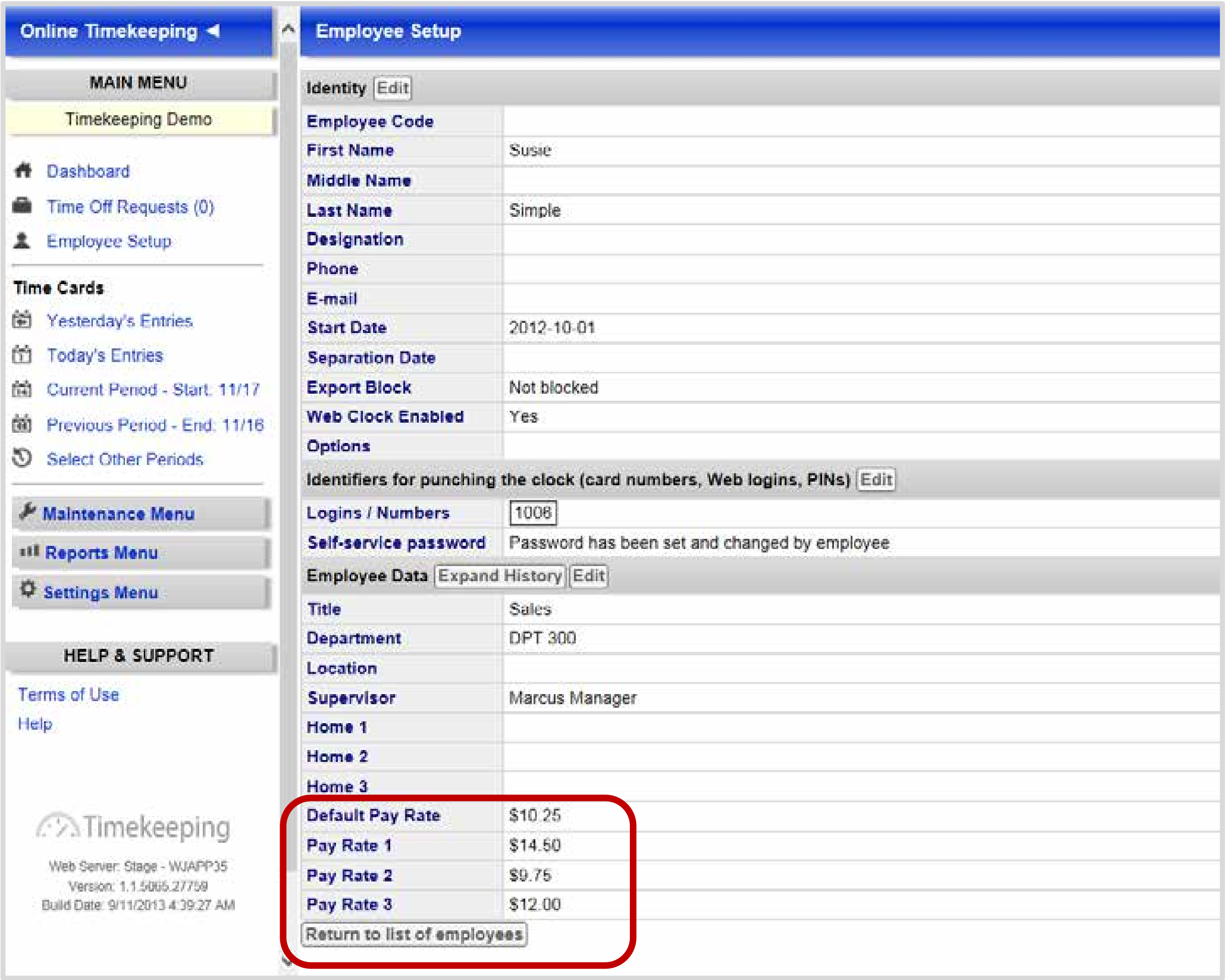
## Employee Setup - Pay Rates

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.



## 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)

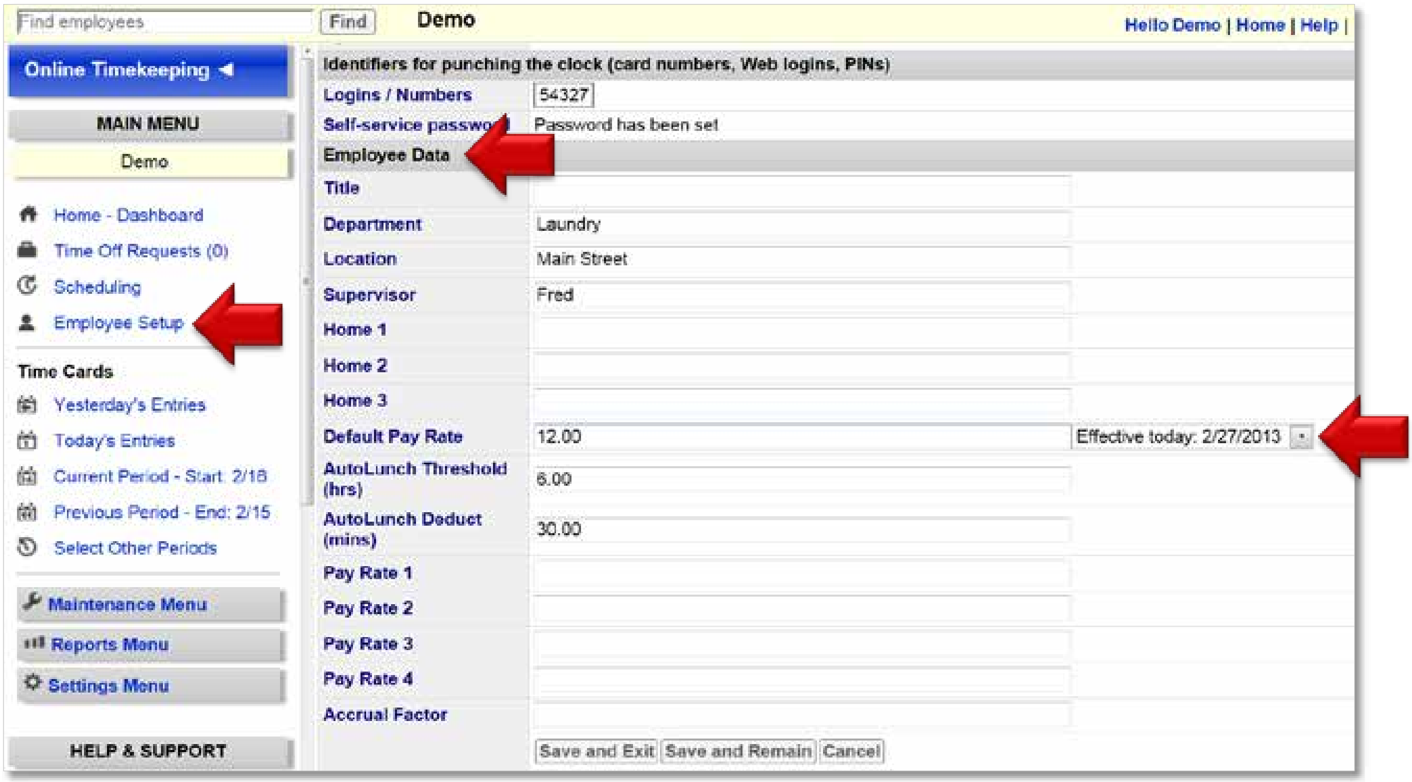
**Step 1.** Select "Employee Setup" from the "Main Menu."

**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.



## Employee Setup - Track Salary Employees

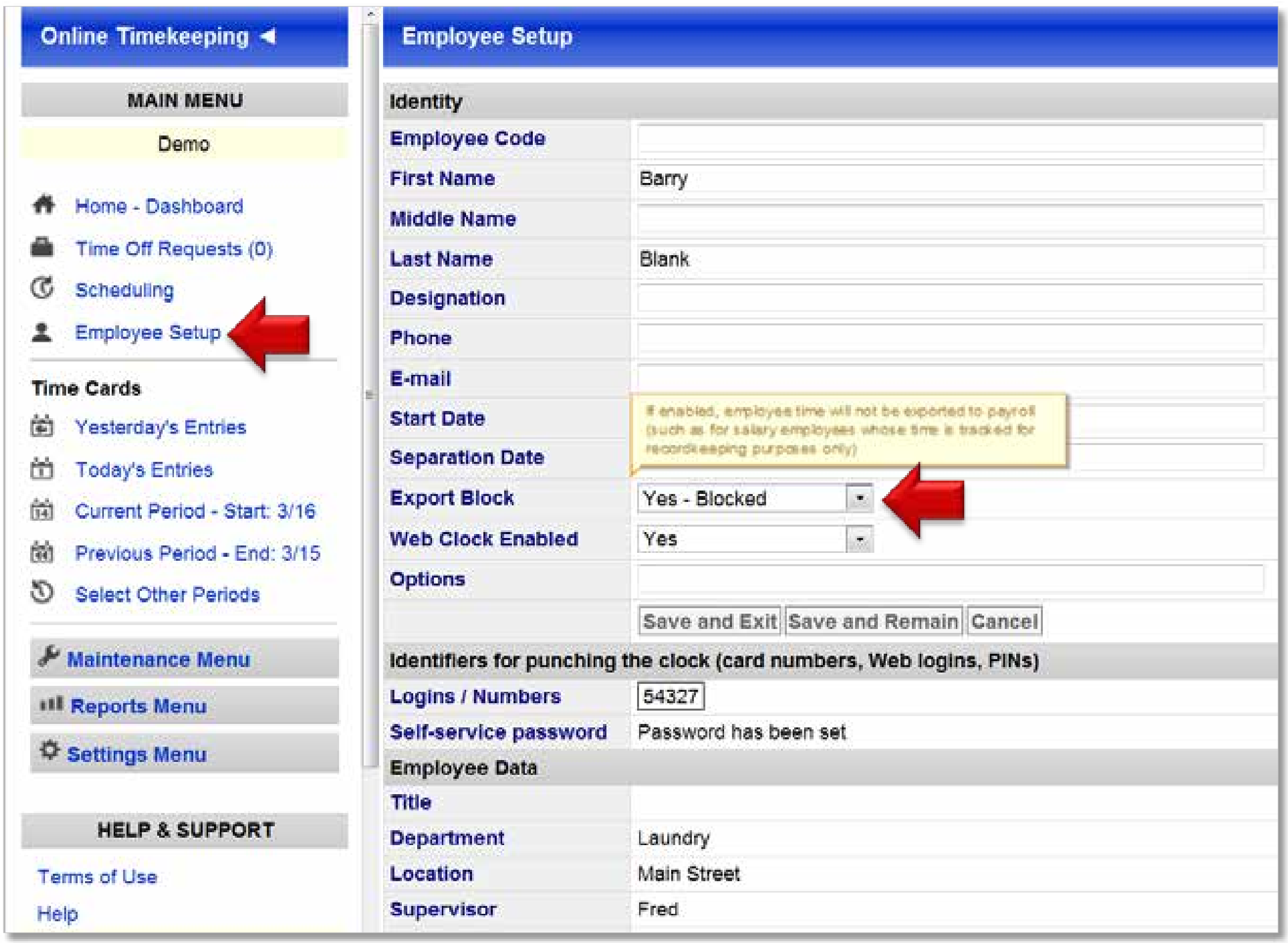
In some cases, the salaried employee, those not assigned to an hourly wage, will clock in/out for tracking purposes only. Time data may not be necessary for payroll processing. This function is supported by blocking the salary employee's data from the payroll file.

**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."




**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.

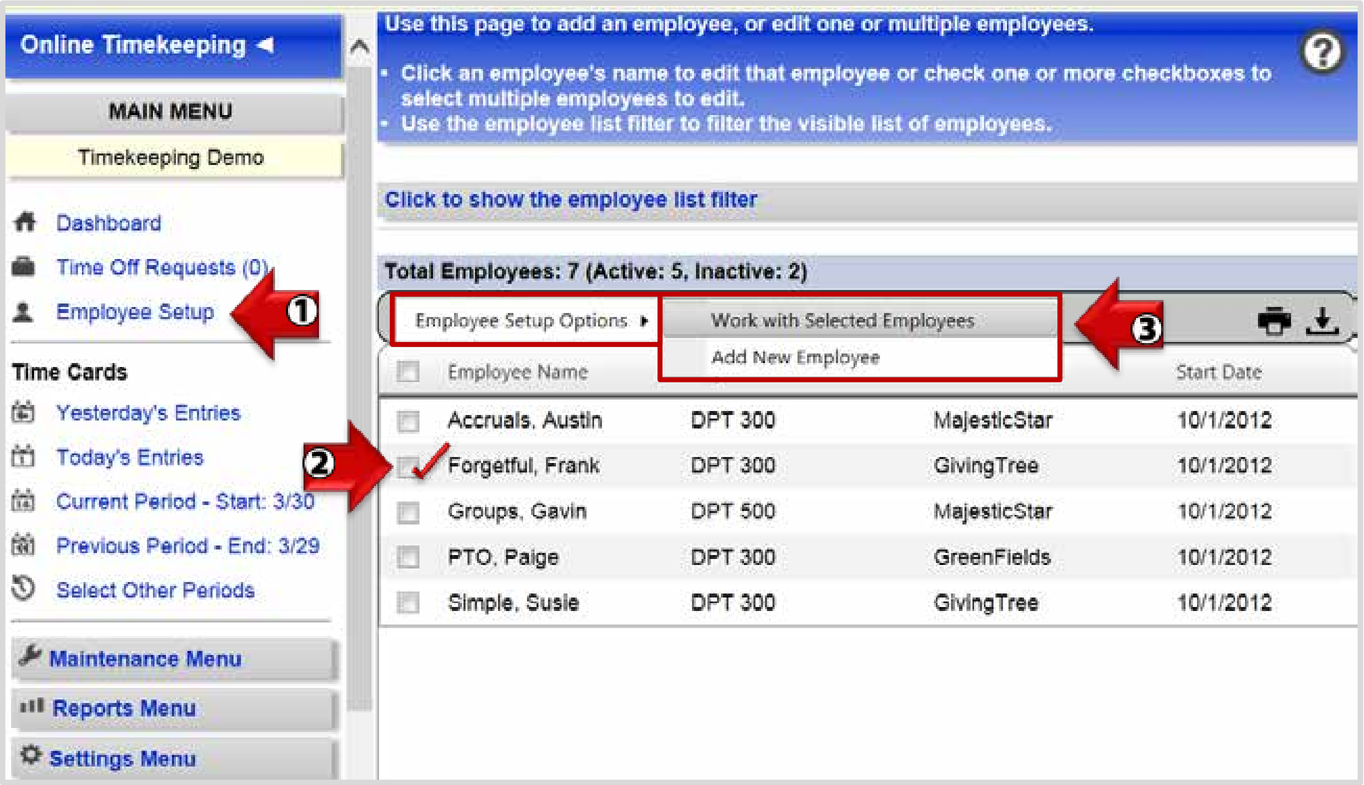
## Employee Setup - Work with Selected Employees

“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.

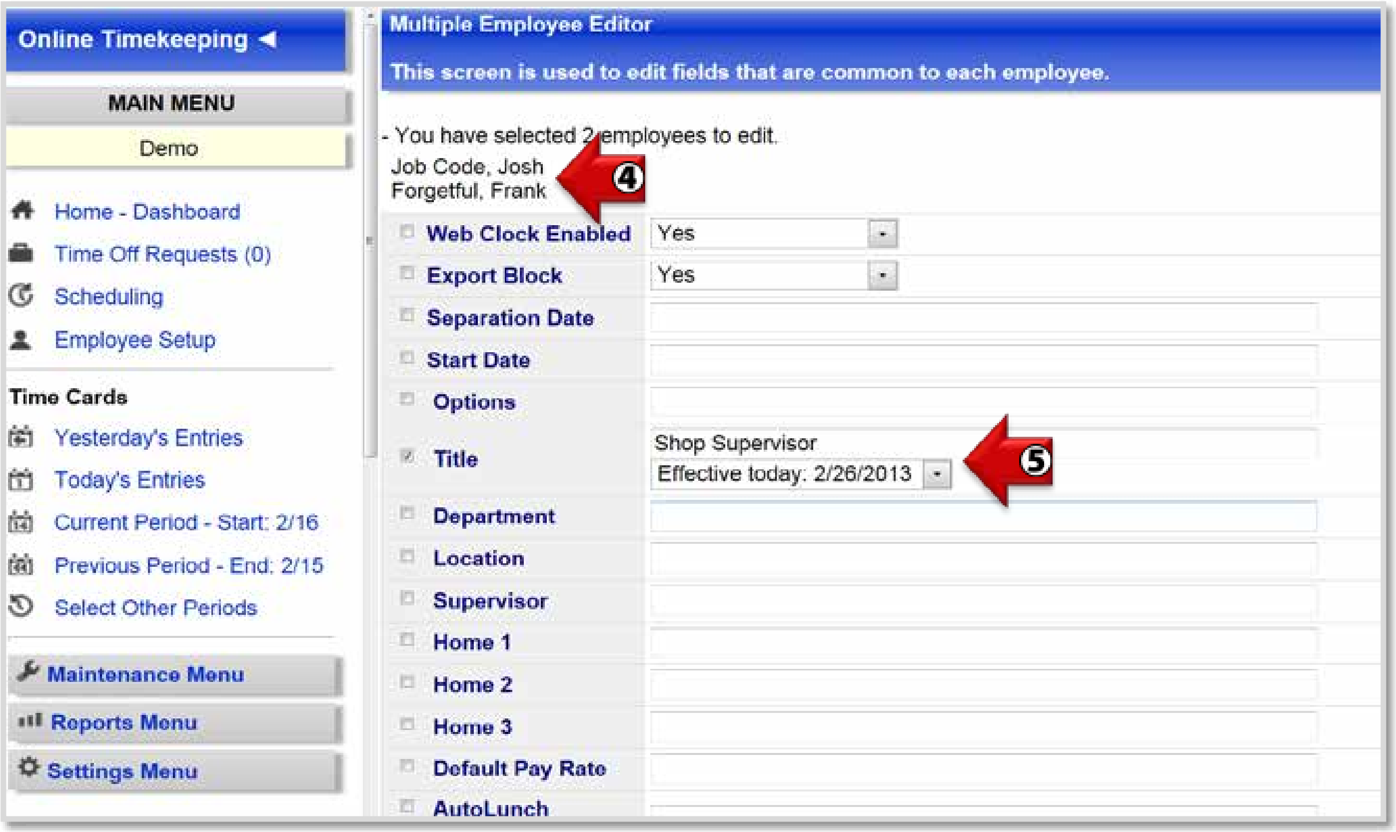
**Step 3.** Select “Work with Selected Employees” option found in the “Employee Setup Options list. See illustration below.



## Employee Setup - Work with Selected Employees Continued

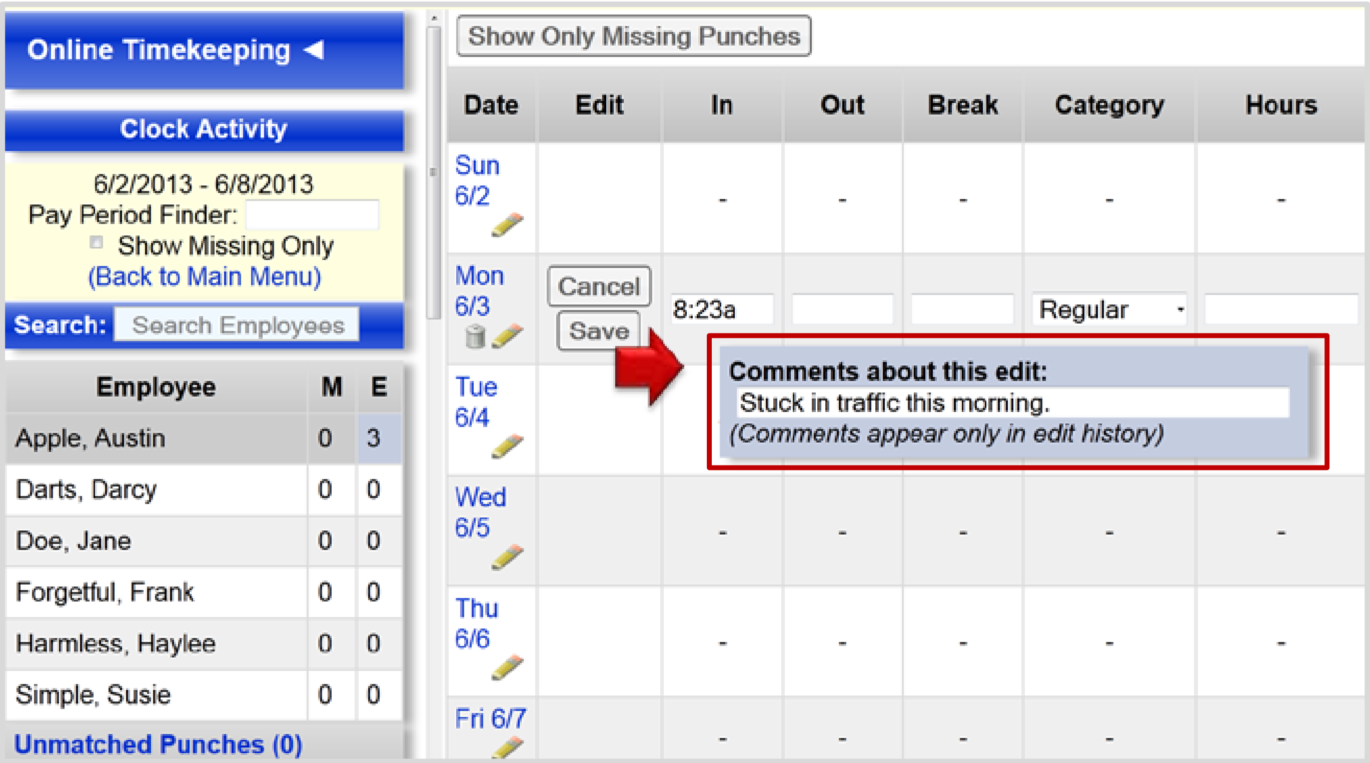
**Step 4.** Verification: Look at the top of the "Multiple Employee Editor" page to confirm the employees you have selected.

**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.



## 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.



## 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.

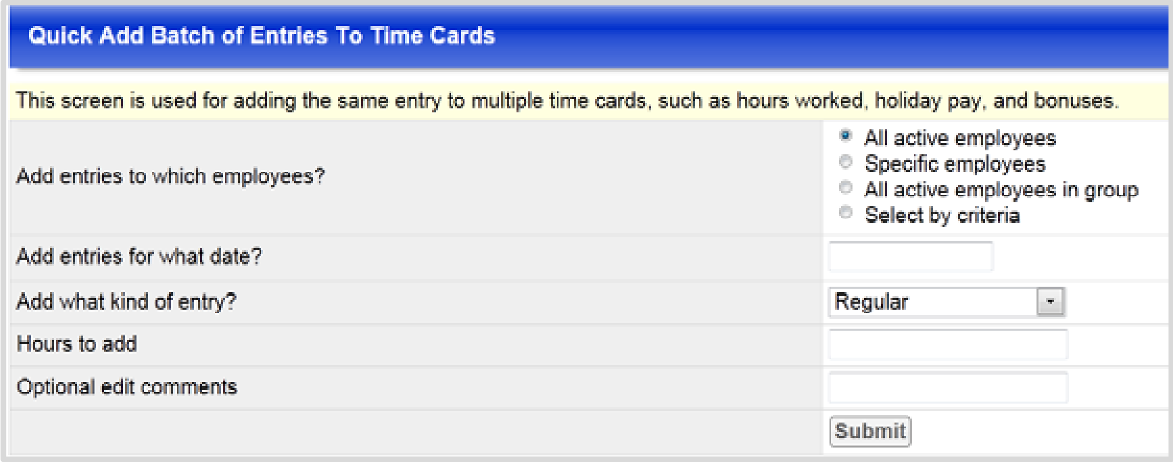
**Step 2.** Key in a date or select a date from the calendar pop up.

**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.

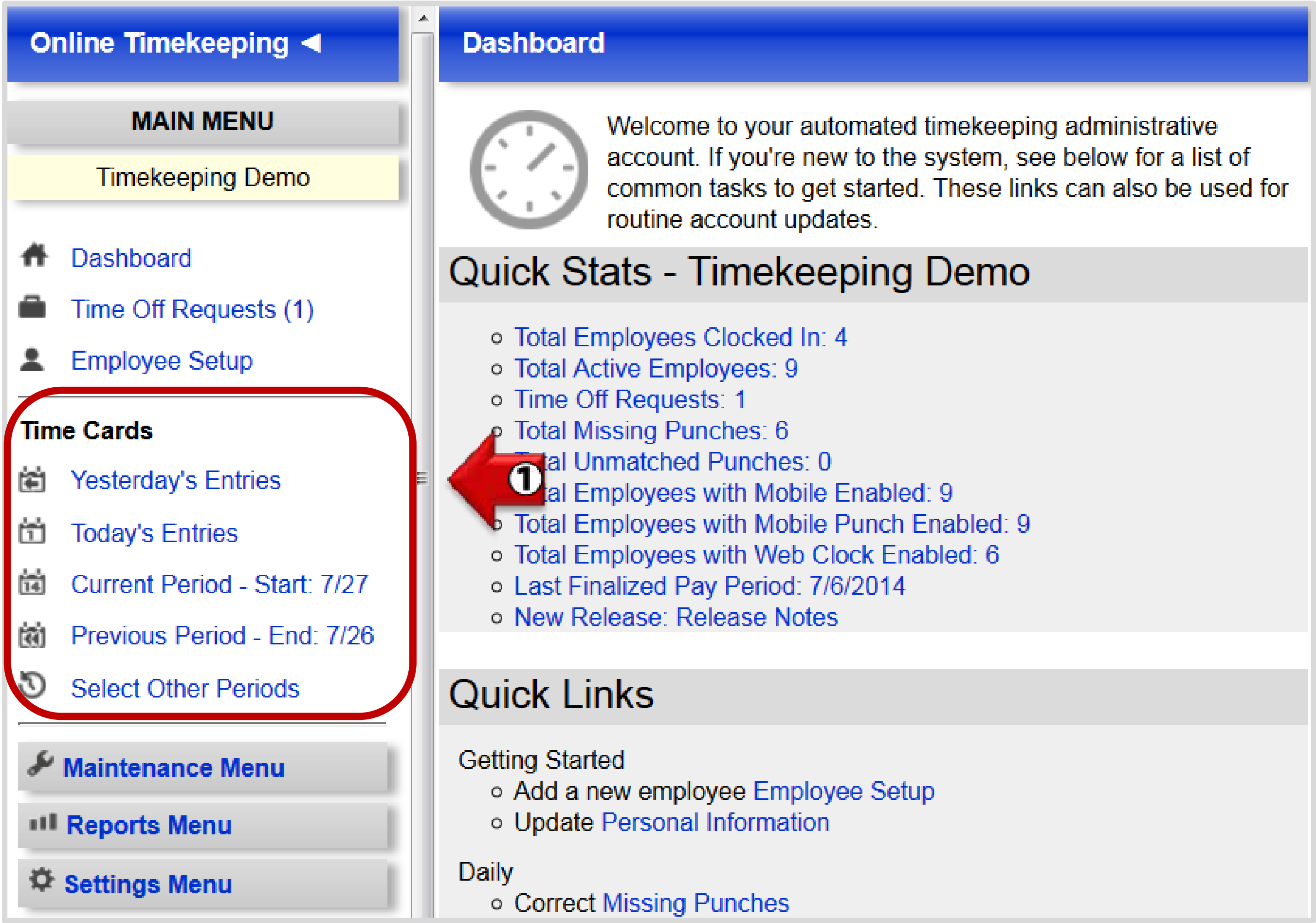
**Step 5.** Adding a comment in the optional edit comments field will flag the employee's timecard with a note. You can view this comment by placing your mouse over the holiday hours on the employee's time card or by running a "Punch Notes Report."

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



## Time Card Management - Edit a Time Card

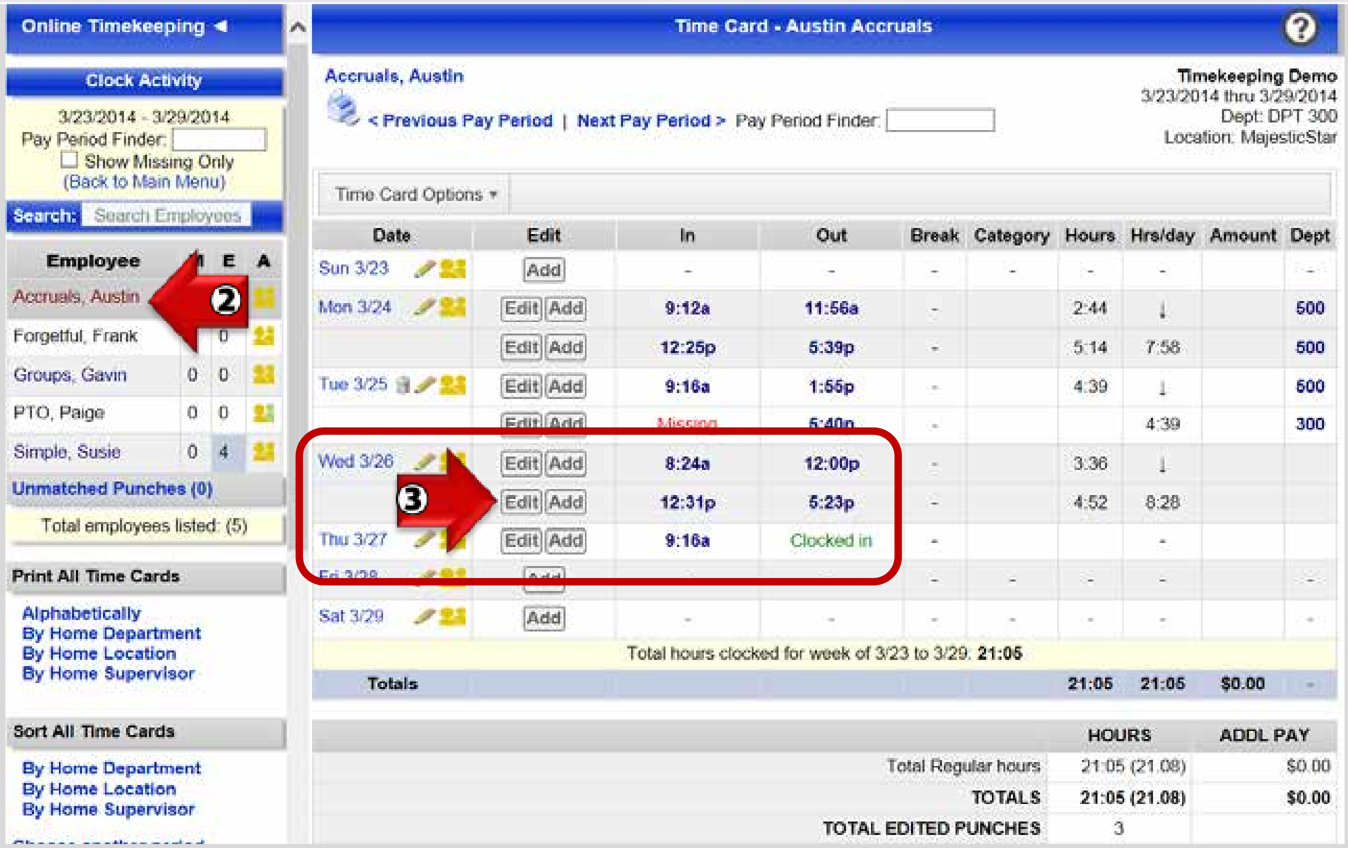
**Step 1.** To edit an employee's time card begin at the "Time Cards" section under "Main Menu". Here you have the option to edit a single day or a pay period. Select one of these options to continue. See below.



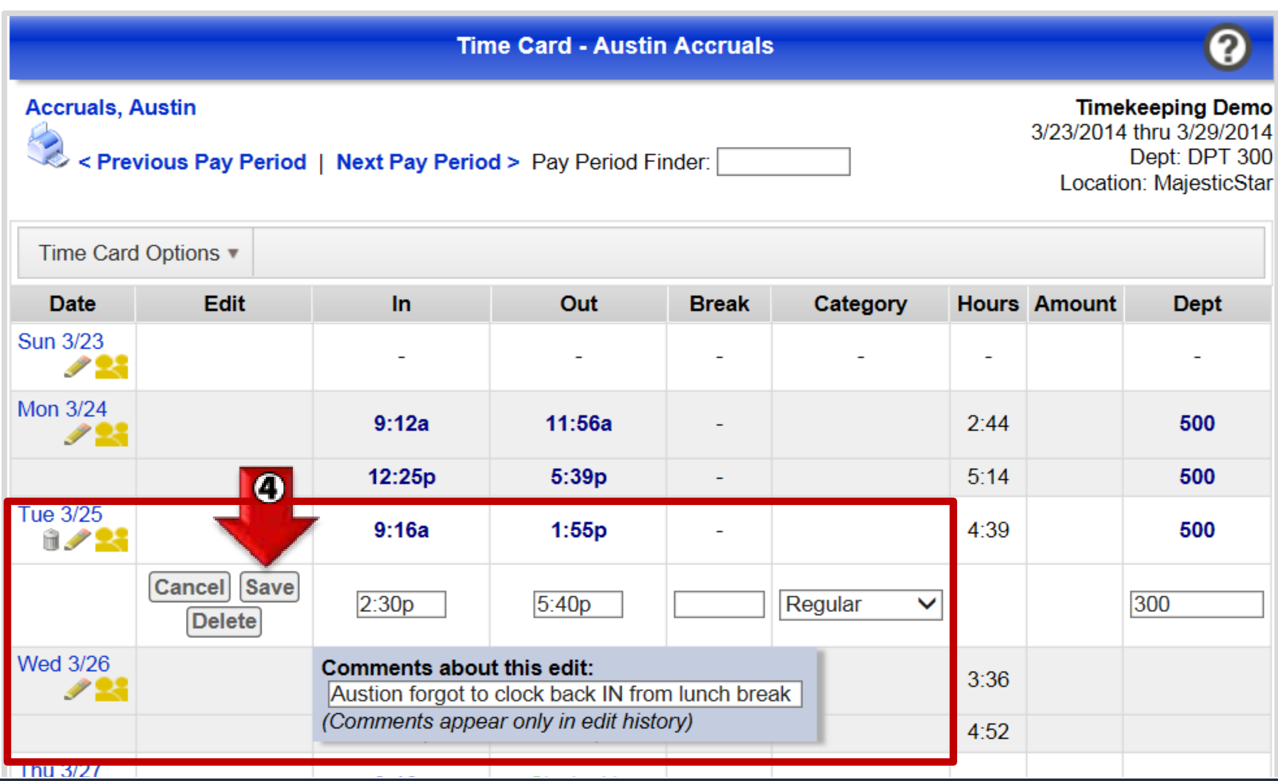

**Step 2.** Next, select an employee to work with by clicking on their name. You should now see the employee's time card.

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

# Time Cards




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



## Time Card Management - Hours Alert

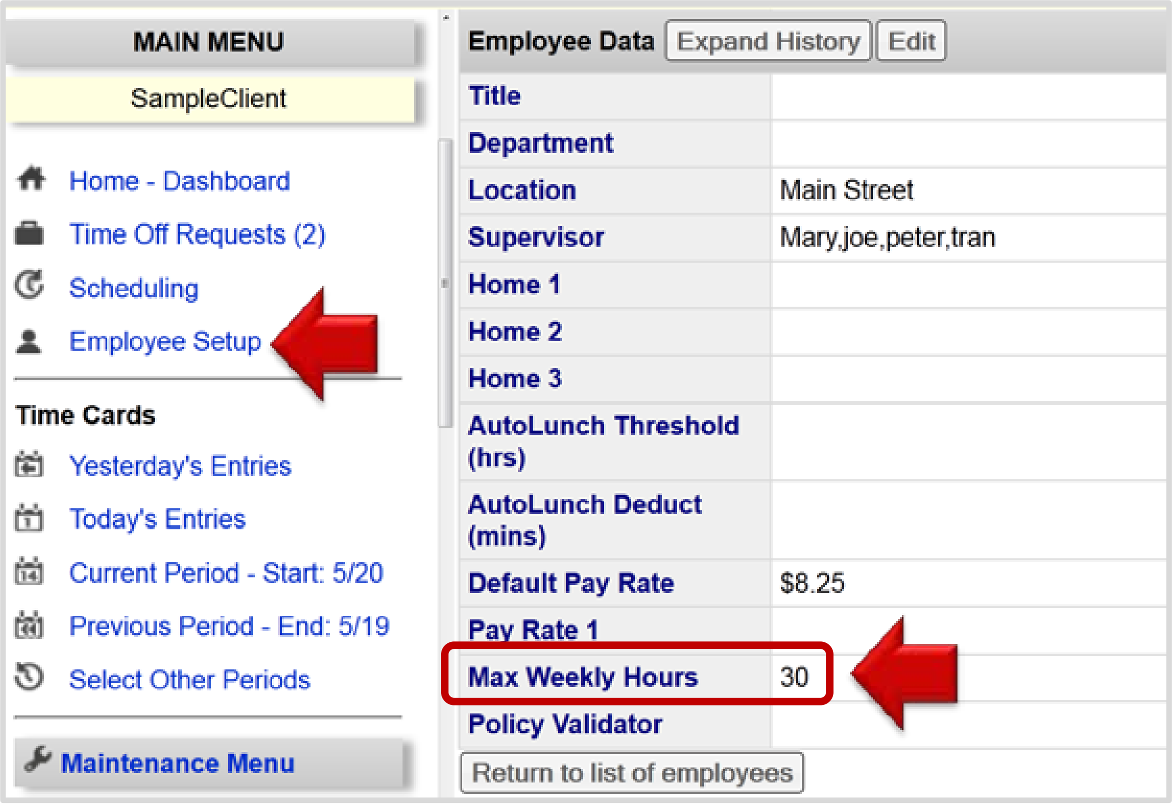
The “Hours Alert” tool is used to give a notification on an employee’s time card, as well as the “Daily Auto Email” report, when they are close to reaching a set amount of hours in a work week. This tool is a great way to help manage hours for the Affordable Care Act (PPACA), but can be used in other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



# 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** | | | | | | | | | |

Employee will reach 30 hours at 4:33 pm.

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

## 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 blow to learn how.

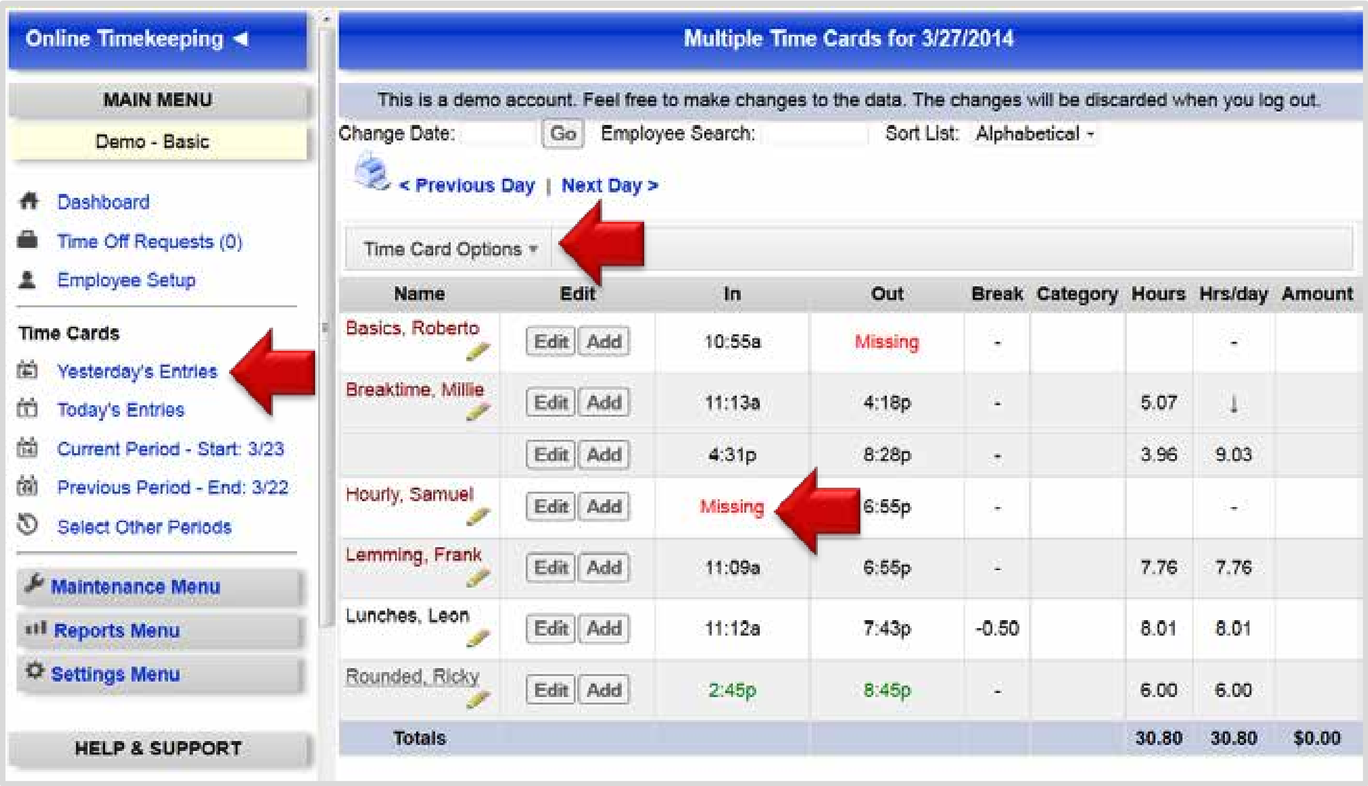
**Option One**

**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.



## Time Card Management - Missing Punches Continued

**Option Two**

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

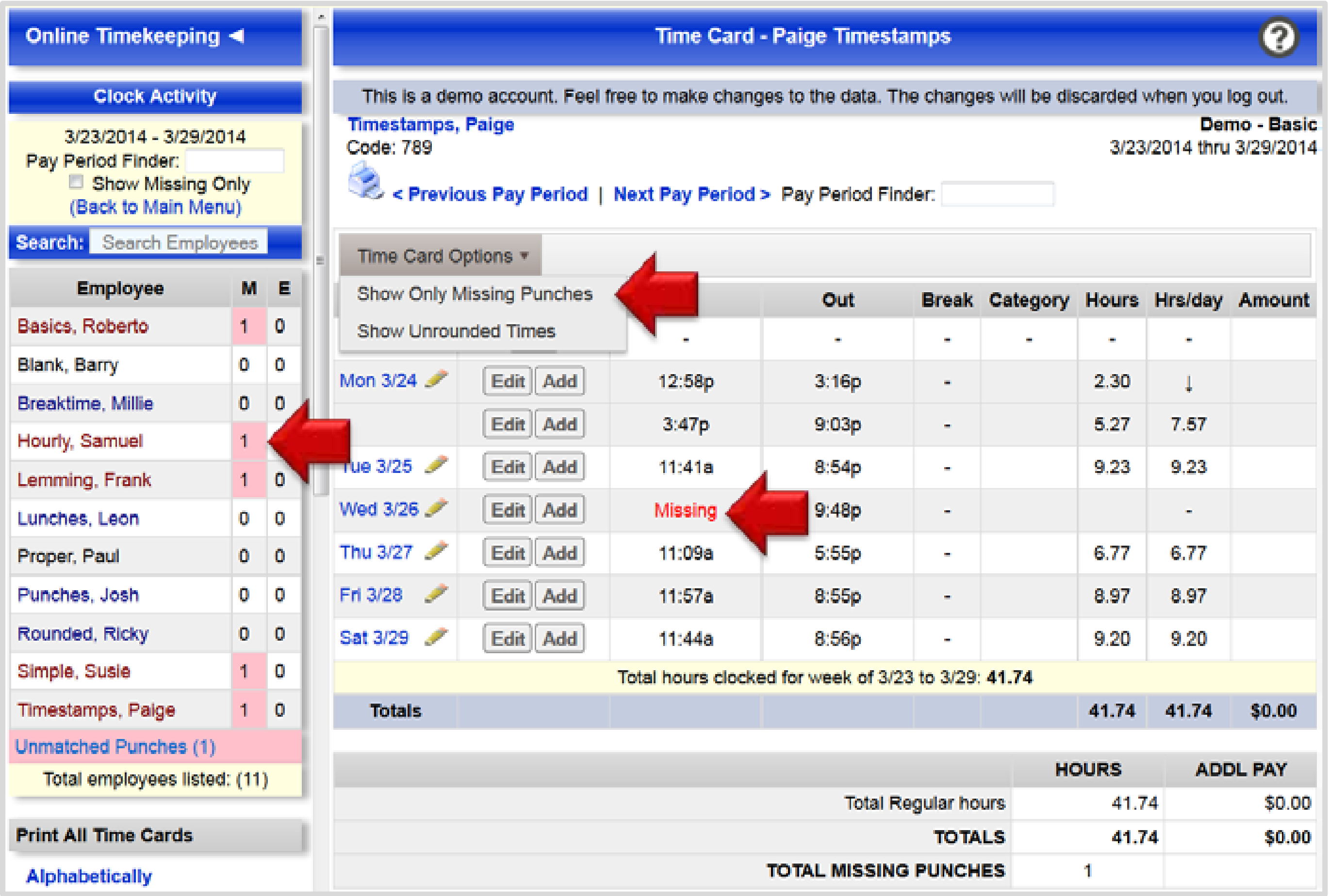
**Step 2.** A list of the employee names will appear along with columns titled M (Missing Punches) and E (Edited Punches). The number associated with the M column indicates the number of missing punches found on that employee's timecard for that specific pay period. The employee names listed in red is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



## 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.

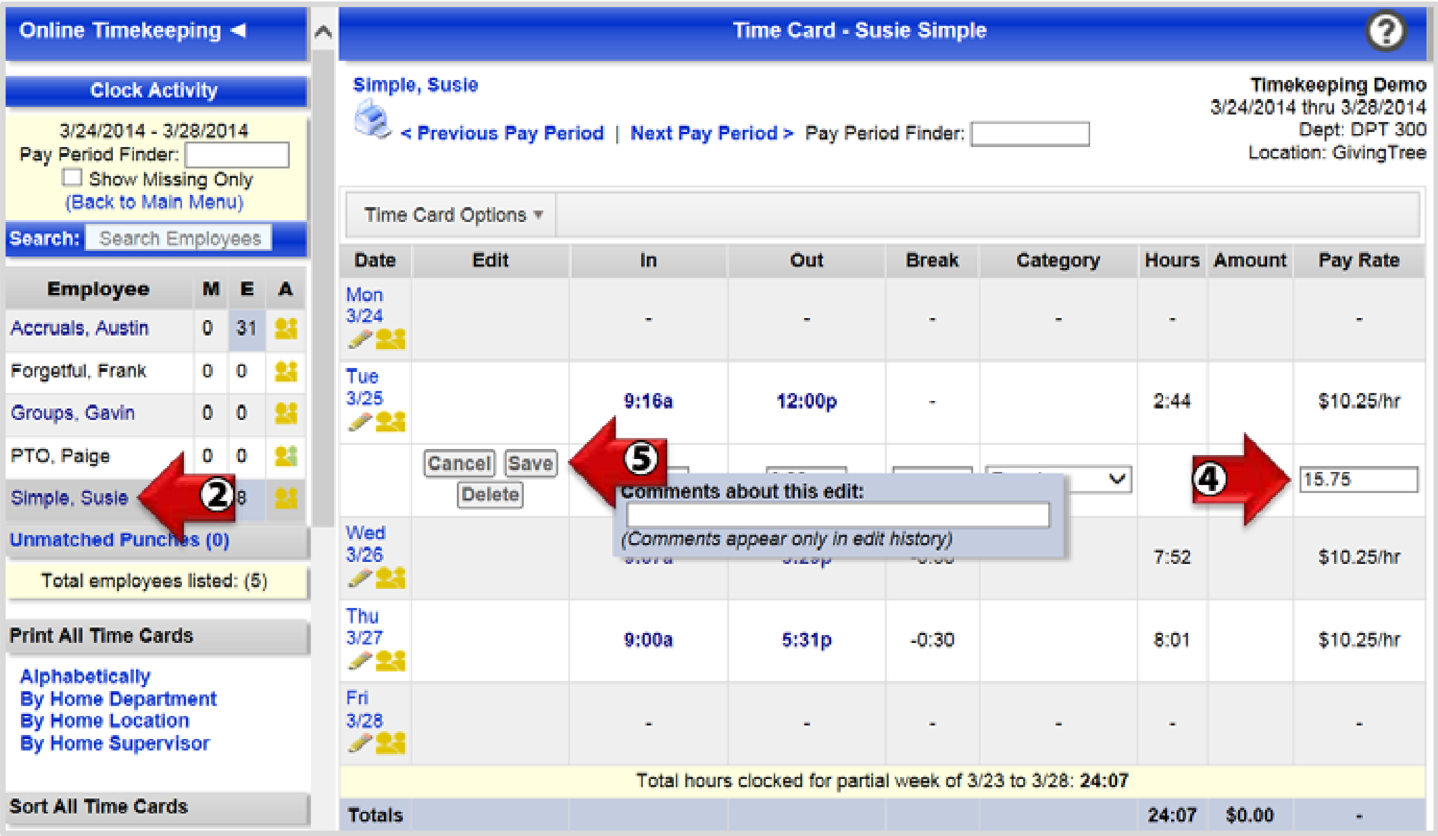
**Step 1.** Select "Current Period" from the left pane.

**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.

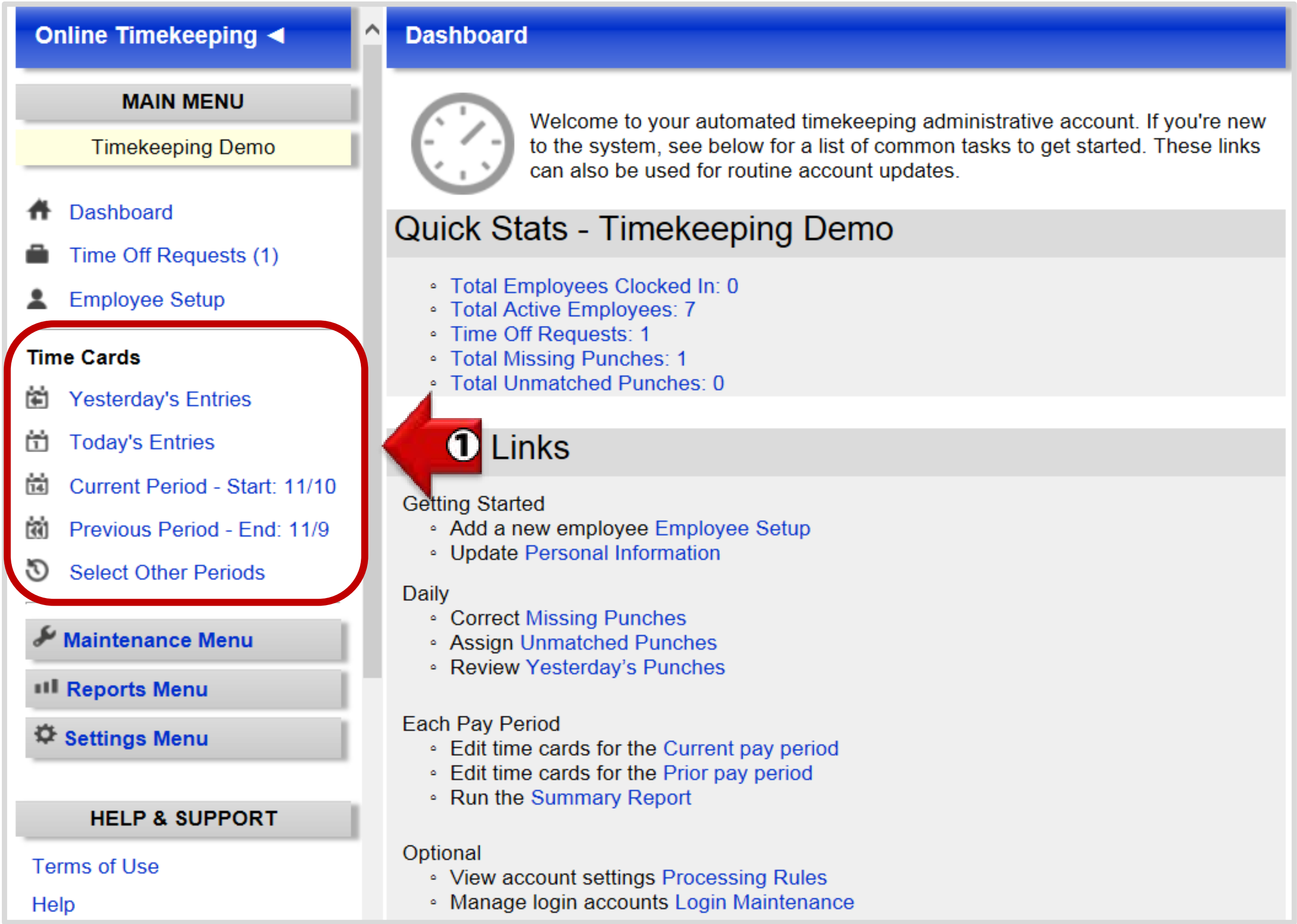


# Time Cards

## 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.

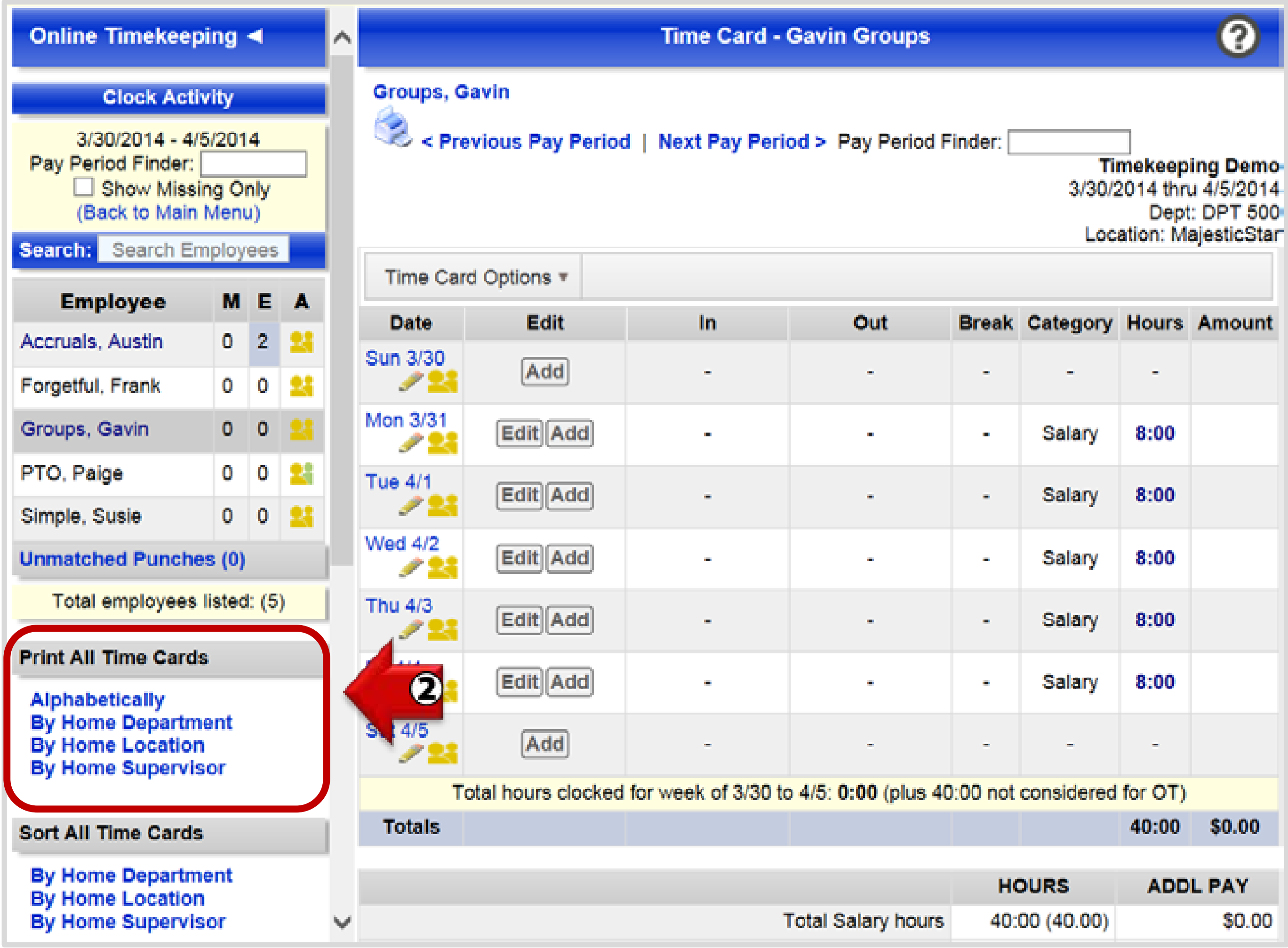
**Step 1**. To access quick-print links for employee time cards, go to the “Time Cards” section found under the “Main Menu.” From here select any of the four options or enter a specific date range by clicking on “Select Other Periods.”



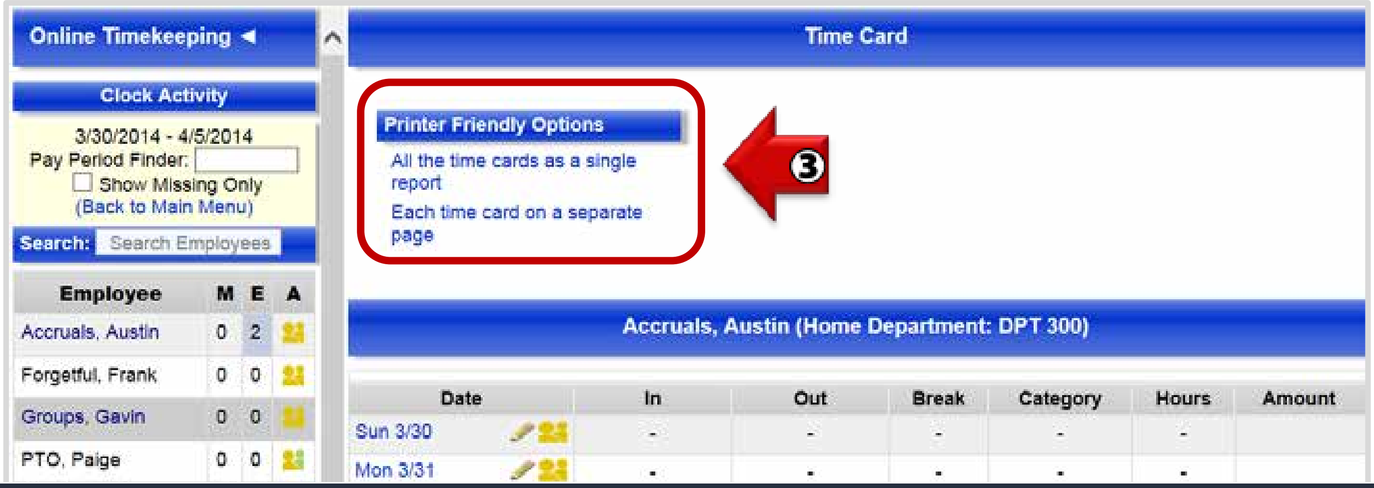

**Step 2.** Depending on the number of employees, you may need to scroll down to the last employee to see the “Print All Time Cards” section in the left pane. Here you have four options to print time cards. Select the order you would like the time cards to be printed.

# Time Cards

## Time Card Management - Print Time Cards Continued




**Step 3.** After selecting the print order you should see the "Printer Friendly Options." Print the time cards as a single report, or each time card on a separate page. See below.



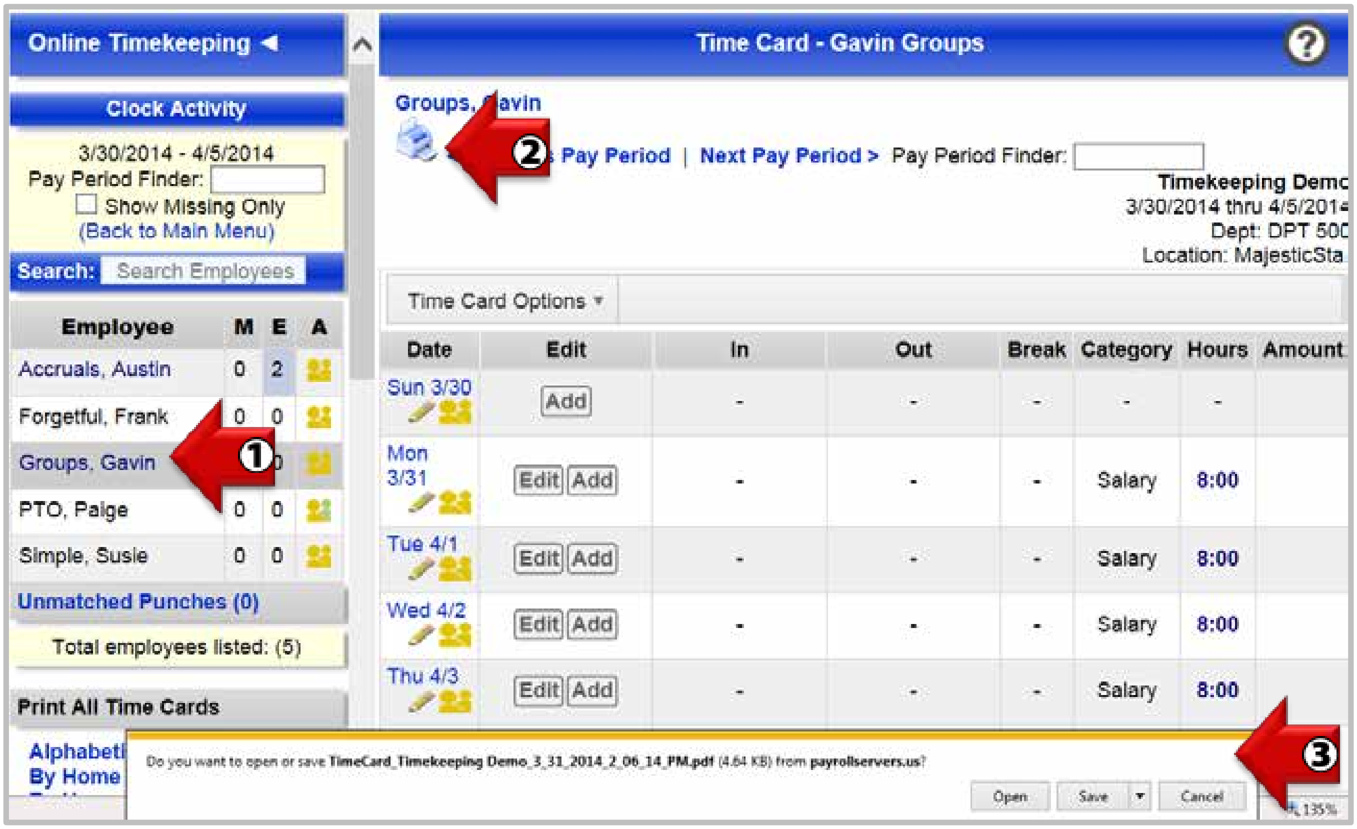
# Time Cards

## 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.

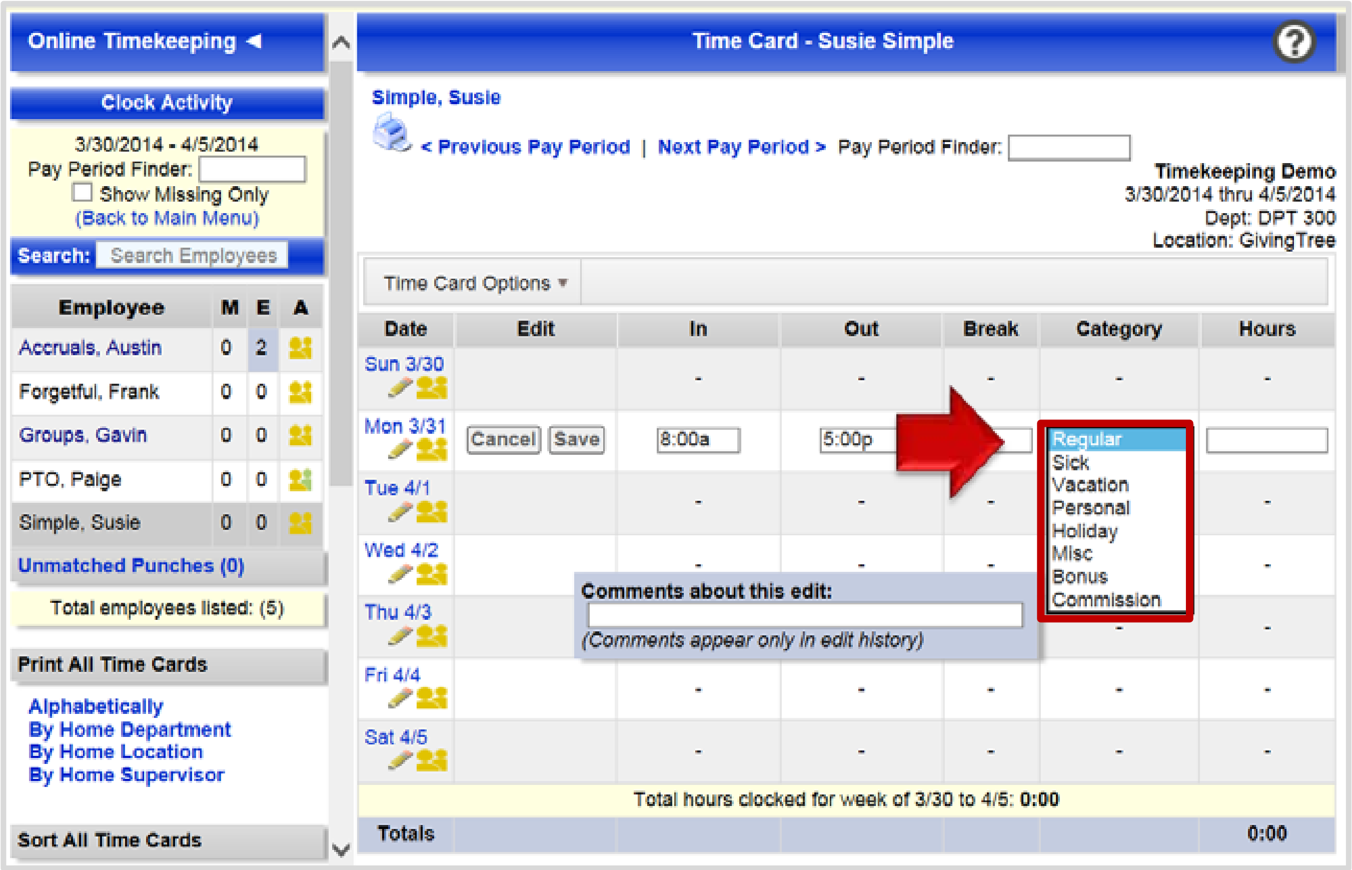
**Step 3.** You will then be prompted to either open the record for printing or to save.  For best results use the PDF file format.



## 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.




**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.

# Time Cards

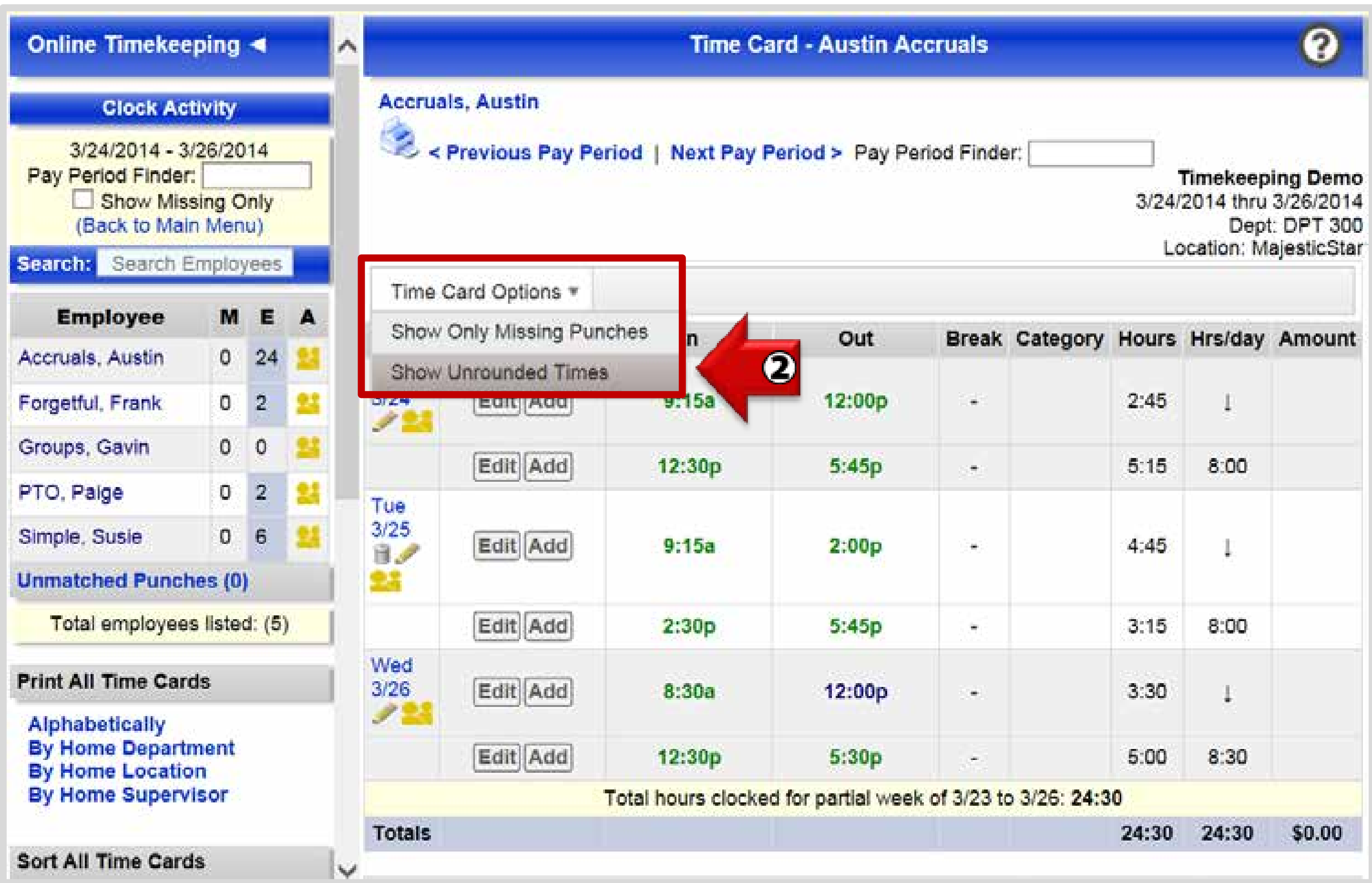
## Time Card Management - Show Unrounded Punches

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.

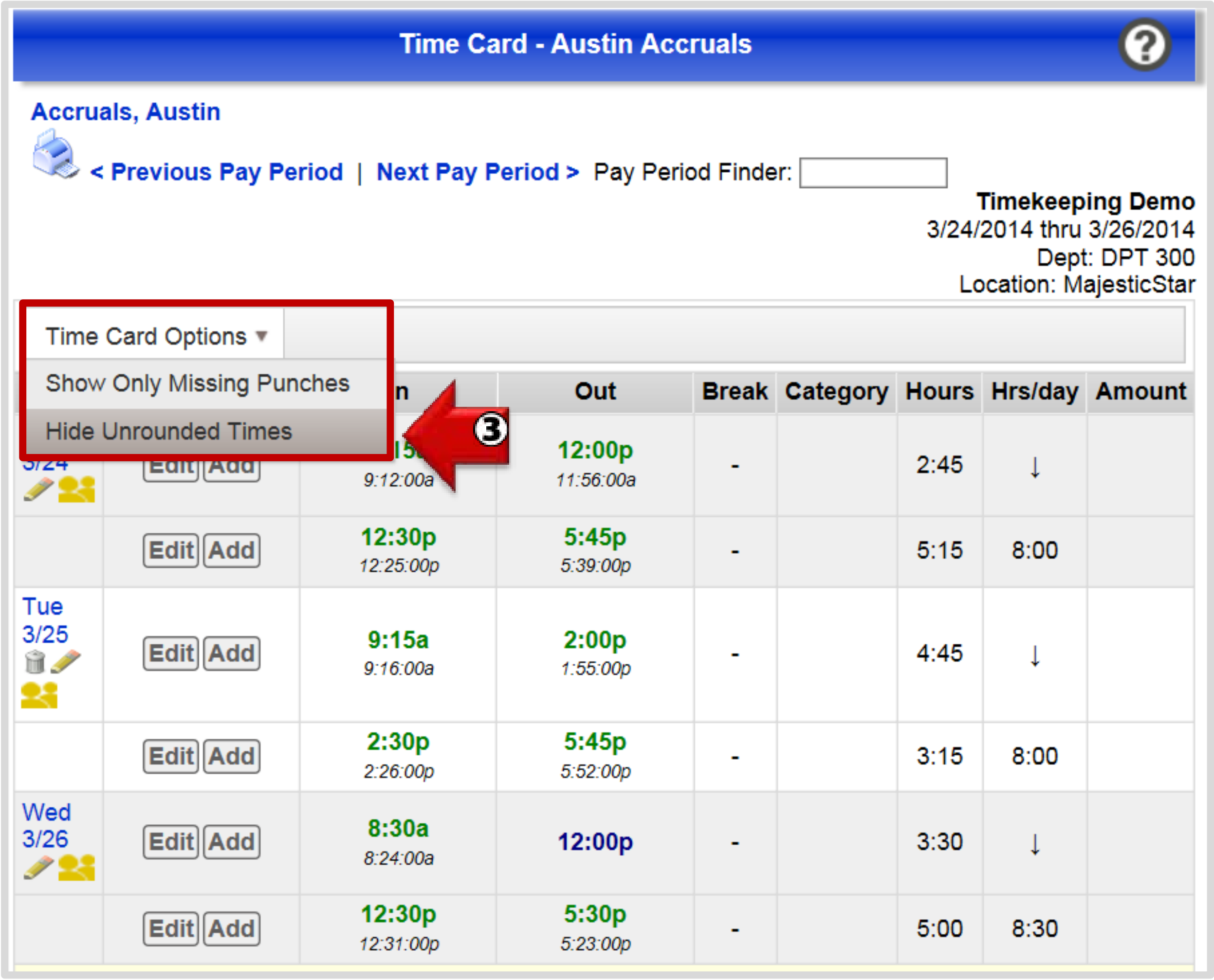
**Step 1.** Go to the "Main Menu," and select one of the options to view "Time Cards." (For the examples below the "Current Period" was selected).

**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.



## Time Card Management - Show Unrounded Punches Continued

**Step 3.** To remove the displayed "Unrounded Punches" simply click "Hide Unrounded Times."



## 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.

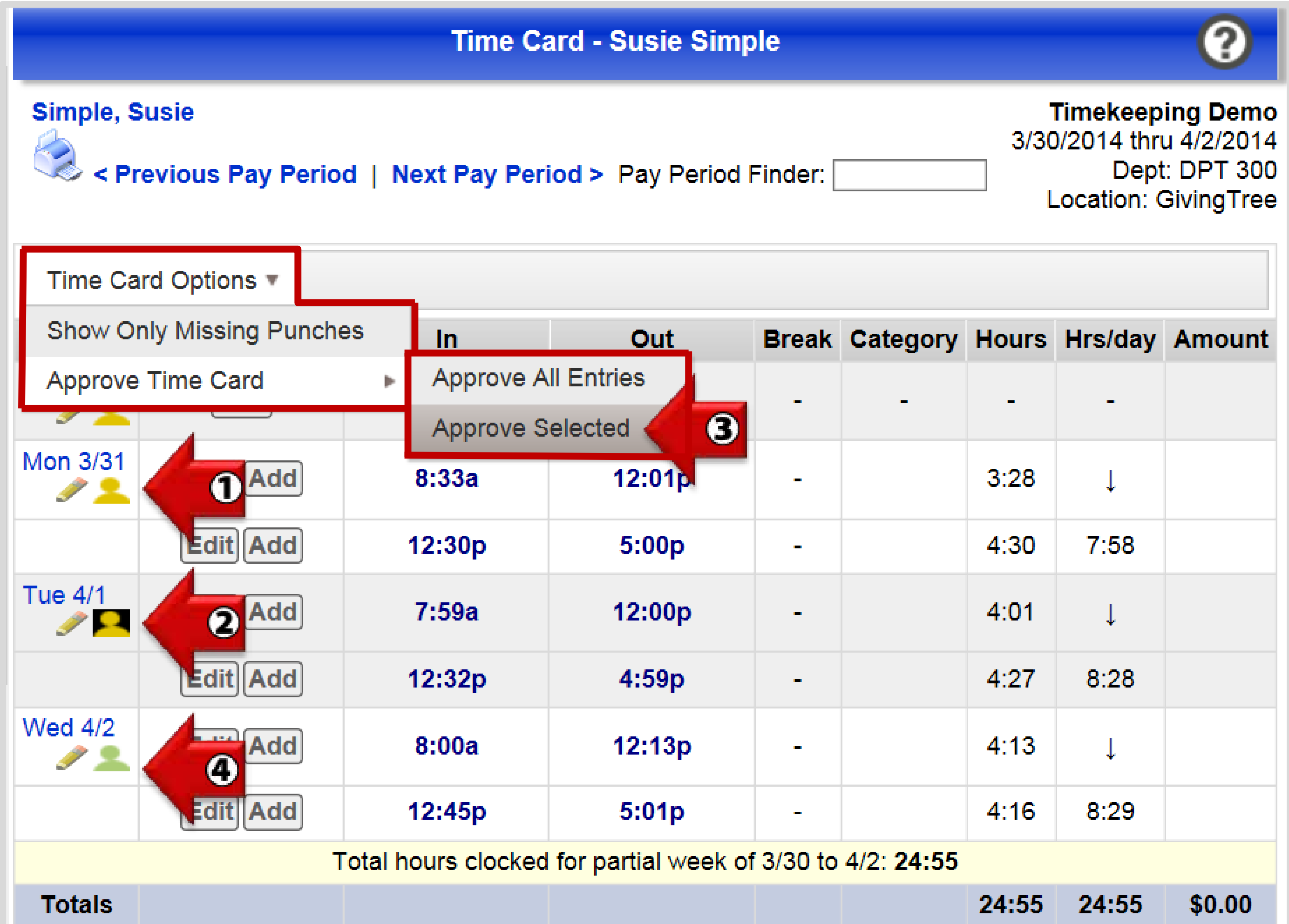
  (2) The image background will turn black indicating this image has been selected and will allow you to select additional days.

  (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.

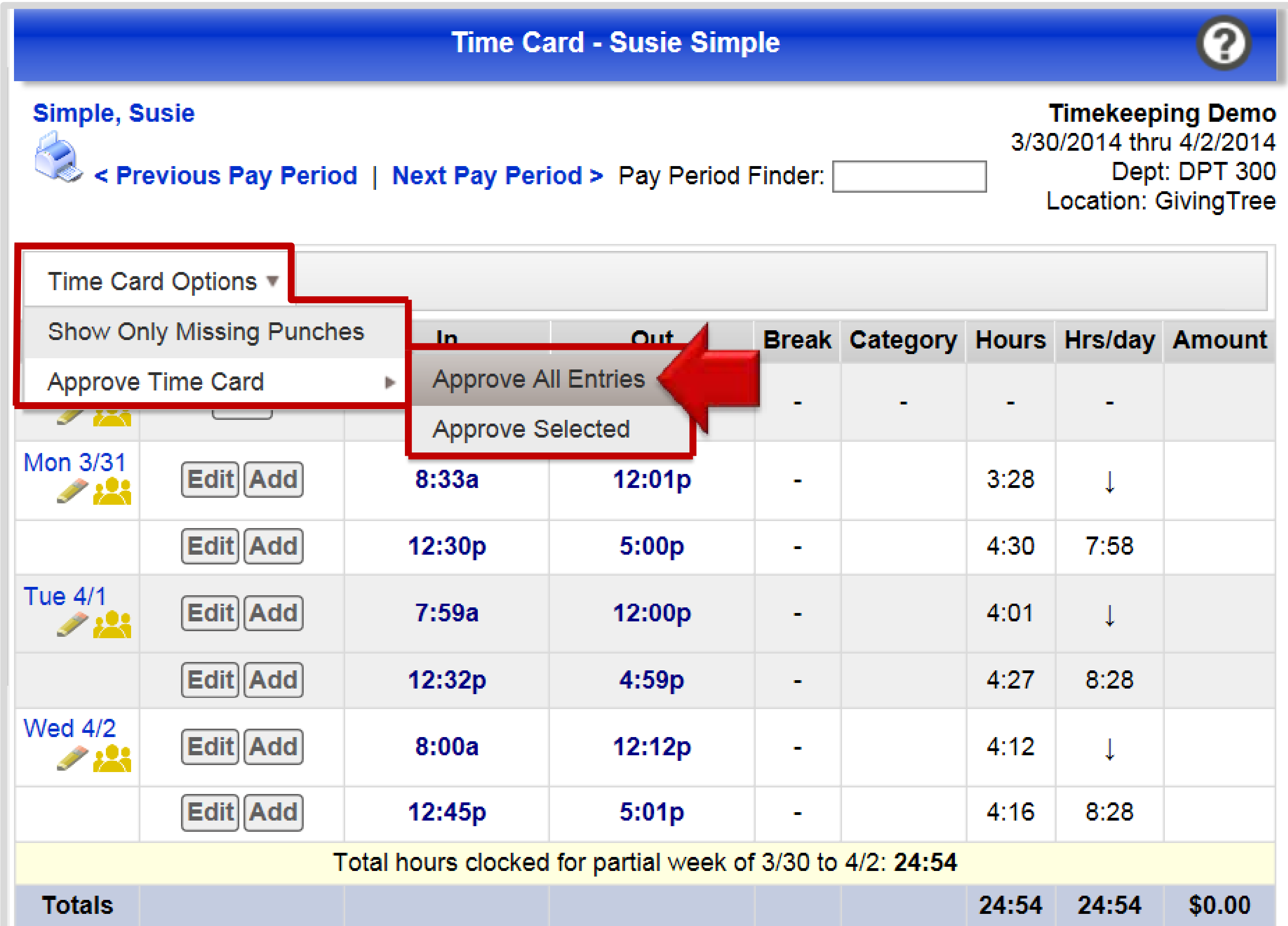
# Time Cards

## Time Card Management - Time Card Approvals Continued



## Time Card 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.




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 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 | Edit Add | 10:00p | Clocked in | - | | |
| Mon 5/13 | Add | - | - | - | - | - |
| Tue 5/14 | 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 | Add | - | - | - | - | - | - |
| Mon 5/13 | Edit Add | 10:00p-1 | 2:00a | - | | 4:00 | ↓ |
| | Edit Add | 2:30a | 6:30a | - | | 4:00 | 8:00 |
| Tue 5/14 | Add | - | - | - | - | - | - |

## 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.

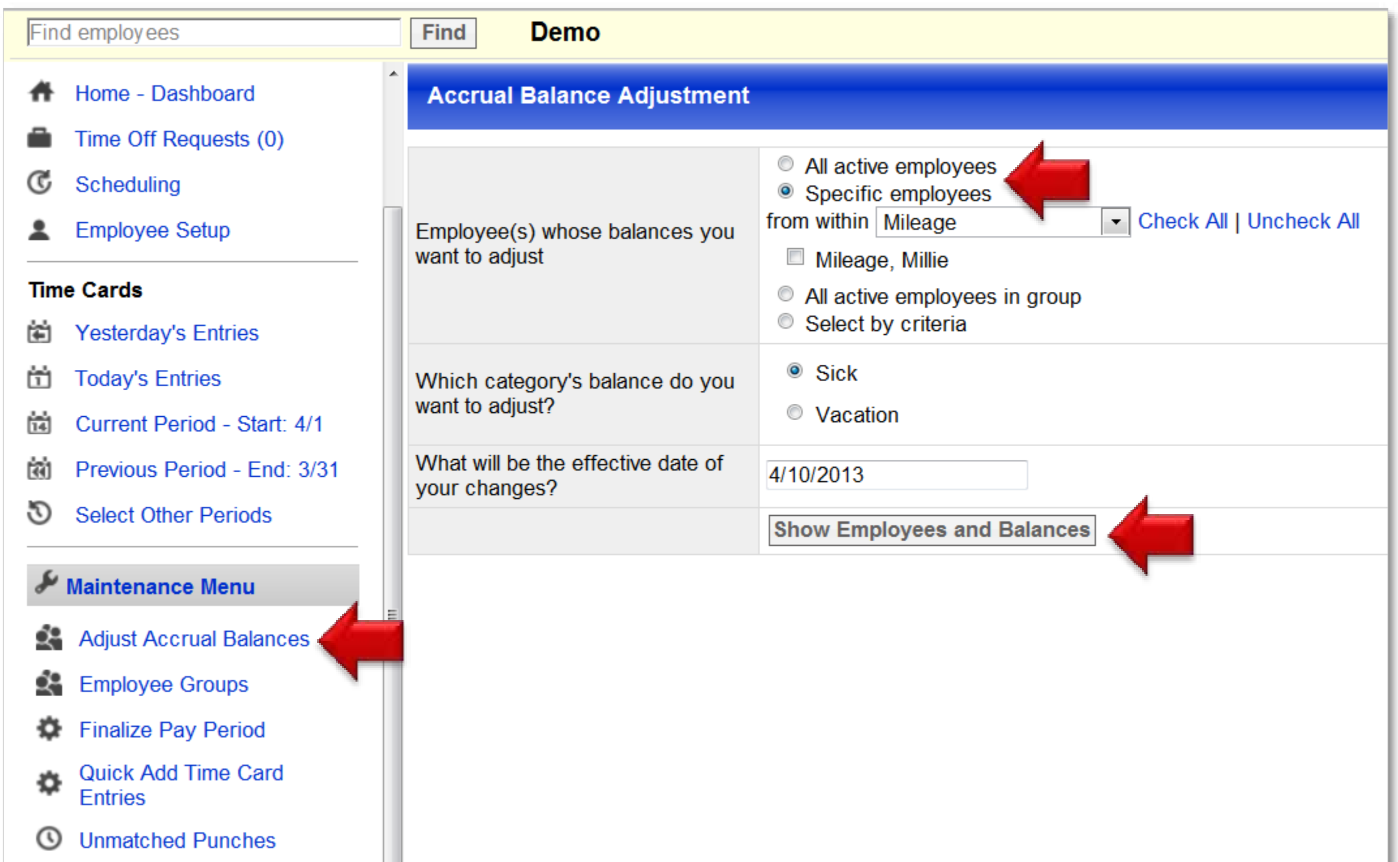
**Step 1**. Select “Adjust Accrual Balances” from the “Maintenance Menu.”

**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.”



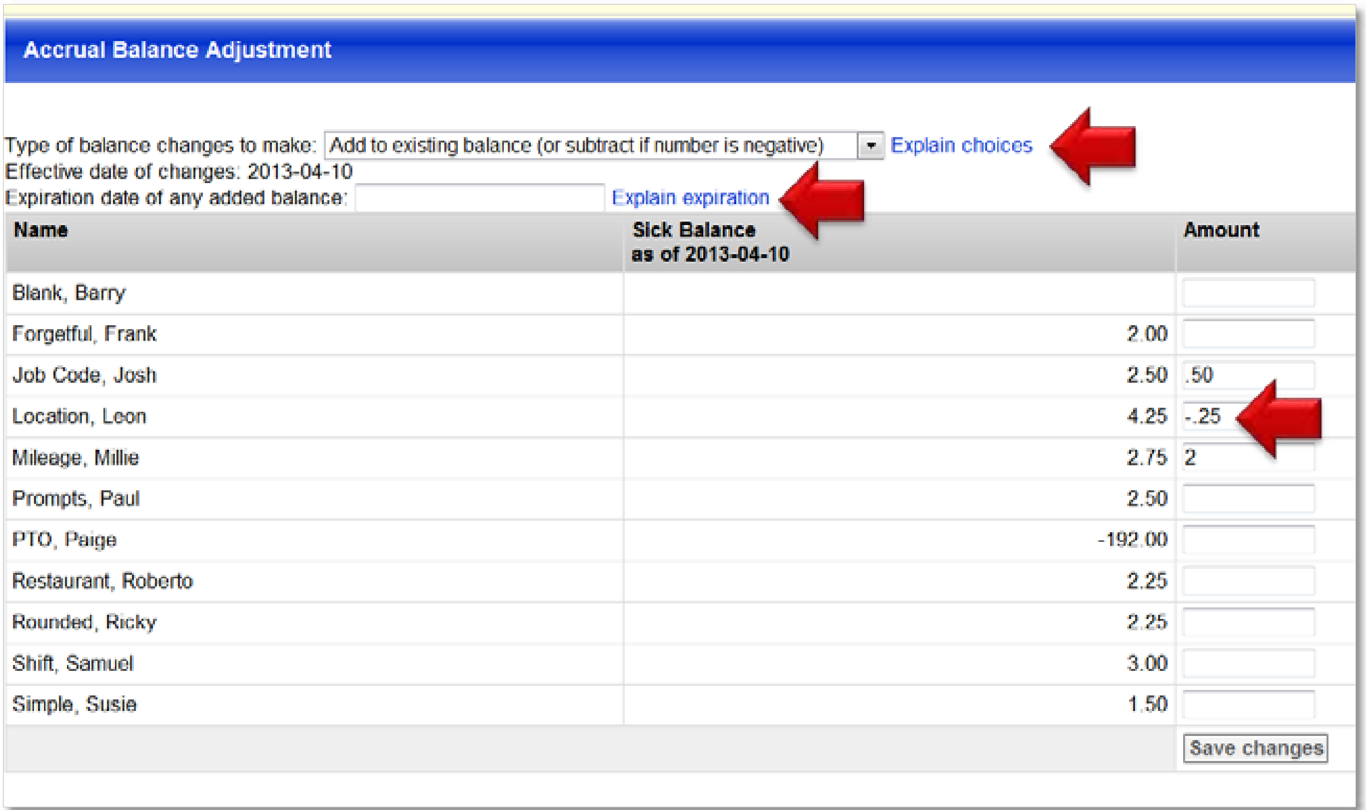
# Maintenance Menu

## 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: Add to existing balance (or subtract if number is negative) 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 | | |
| Forgetful, Frank | 2.00 | |
| Job Code, Josh | 2.50 | .50 |
| Location, Leon | 4.25 | -.25 |
| Mileage, Millie | 2.75 | 2 |
| Prompts, Paul | 2.50 | |
| PTO, Paige | -192.00 | |
| Restaurant, Roberto | 2.25 | |
| Rounded, Ricky | 2.25 | |
| Shift, Samuel | 3.00 | |
| Simple, Susie | 1.50 | |
| | | Save changes |

# Maintenance Menu

## Employee Groups

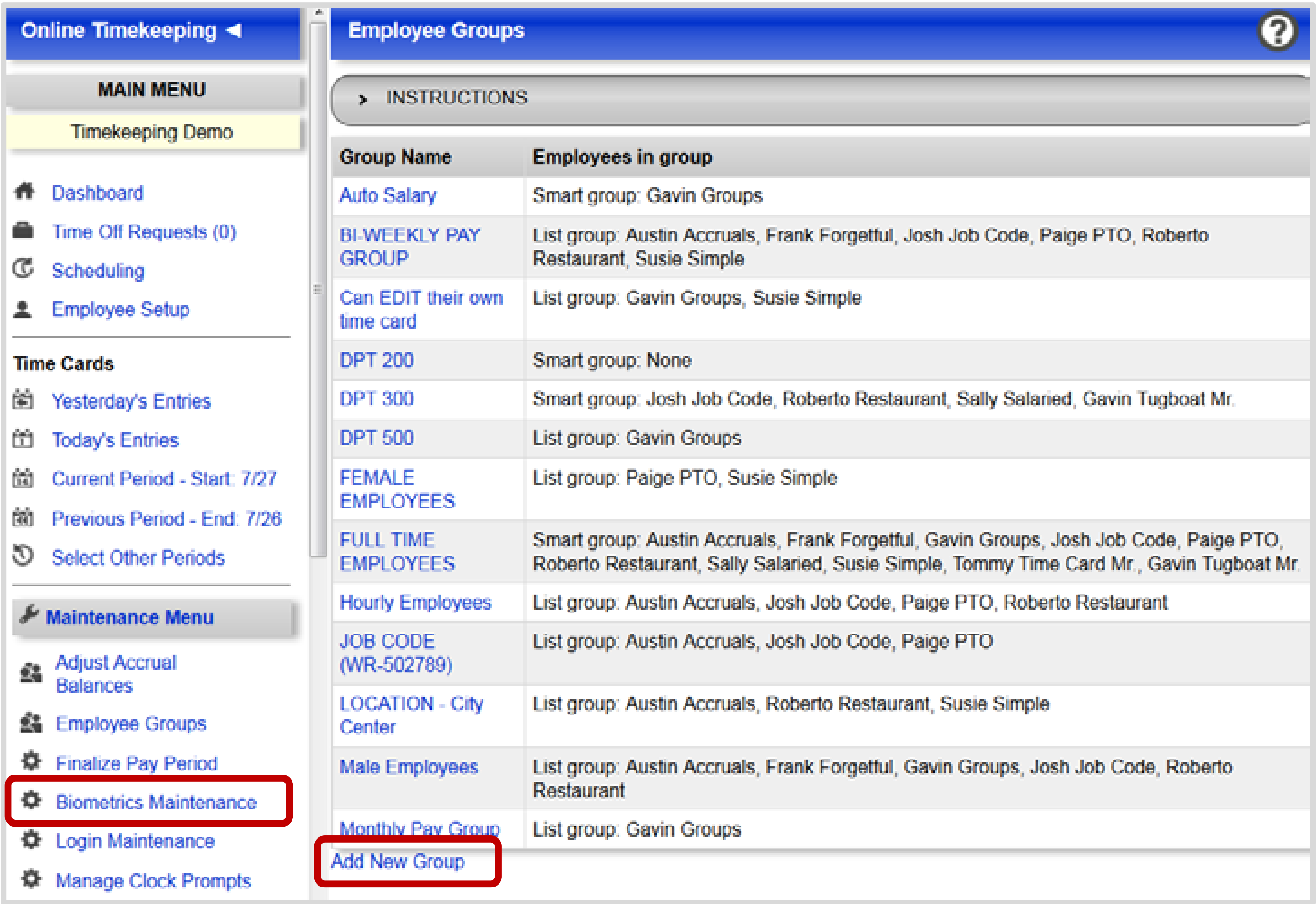
The “Employee Groups” feature lets you group employees together for easy selection elsewhere in the site. One example would be to use “Employee Groups” when setting up supervisor permissions. Employees can be selected from a list, or can be defined by matching certain criteria.

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).




*(Illustration 1.1)*

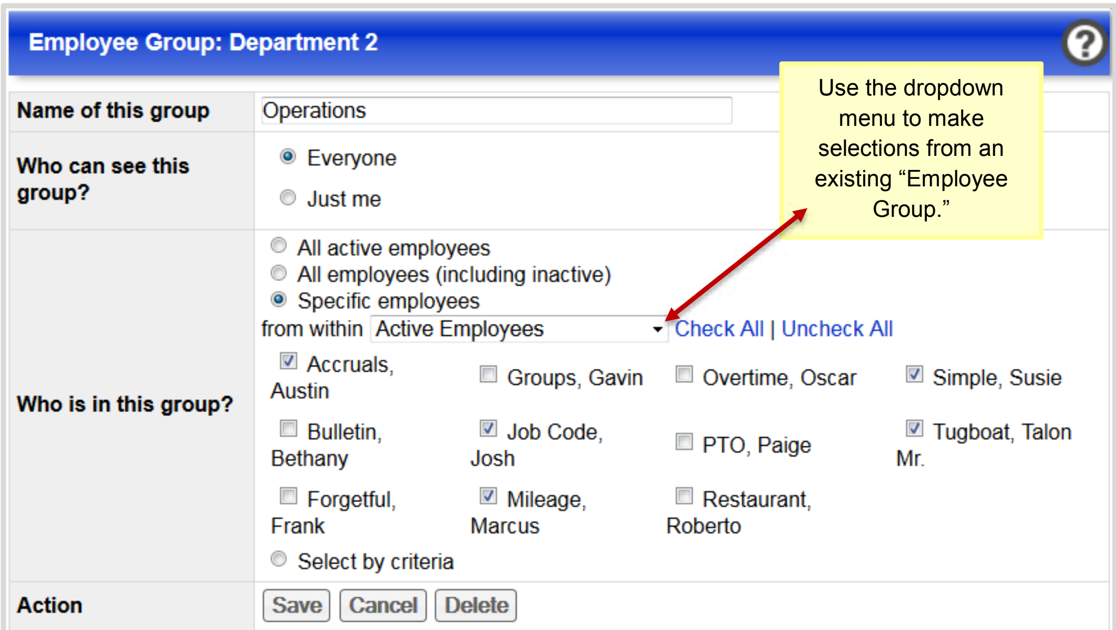
**Step 2.** Enter the “Name of this group,” (See illustration 1.2).

## Employee Groups Continued

**Step 3.** Determine "Who can see this group?"

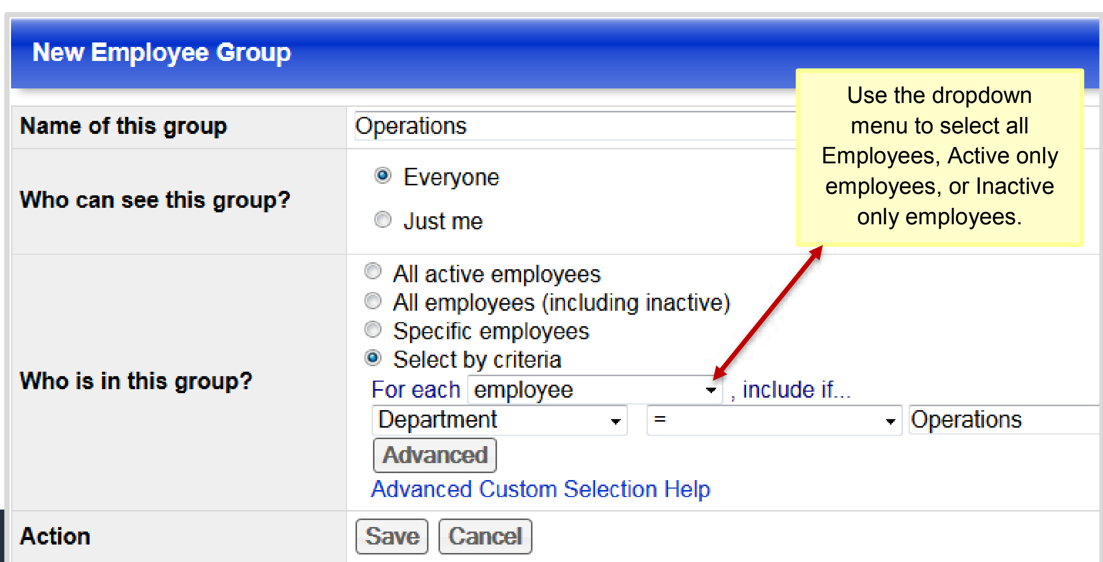
**Step 4.** Decide "Who is in the group?" by selecting one of the four radio buttons.

- 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.




*(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.




 *(Illustration 1.3)*

## 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

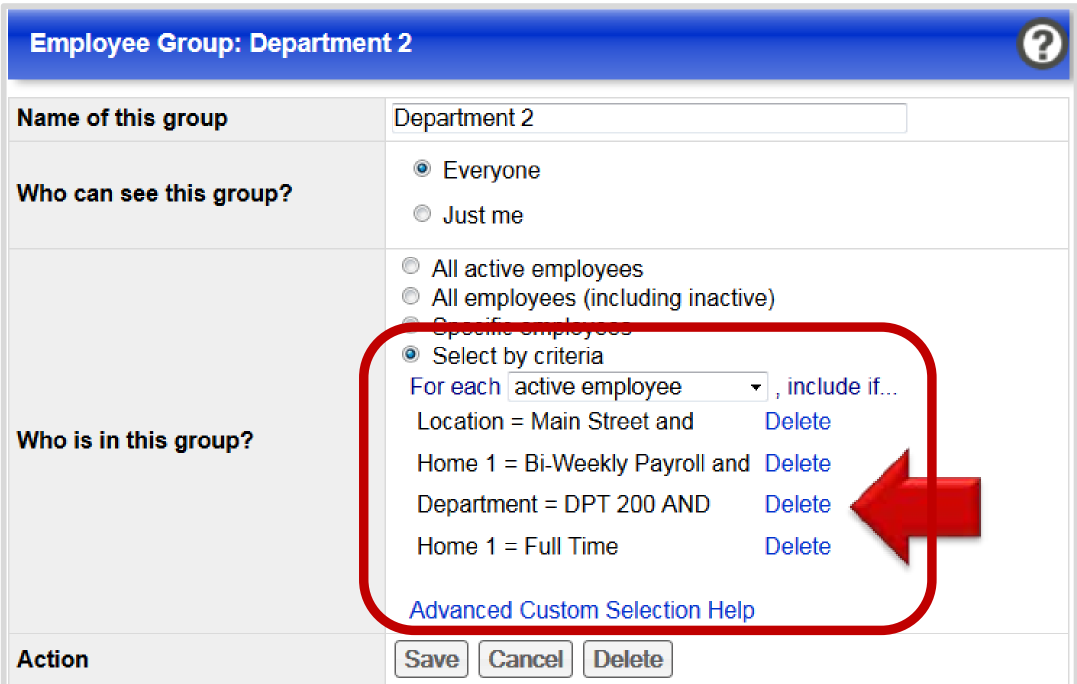
| Group Name | Employees in group |
|---|---|
| Auto Salary | Smart group: Gavin Groups, Talon Tugboat Mr. |
| BI-WEEKLY PAY GROUP | List group: Austin Accruals, Frank Forgetful, Josh Job Code, Paige PTO, Roberto Restaurant, Susie Simple |
| Can EDIT their own time card | List group: Gavin Groups, Susie 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).

## Employee Groups Continued




*(Illustration 1.4)*

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

## 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."

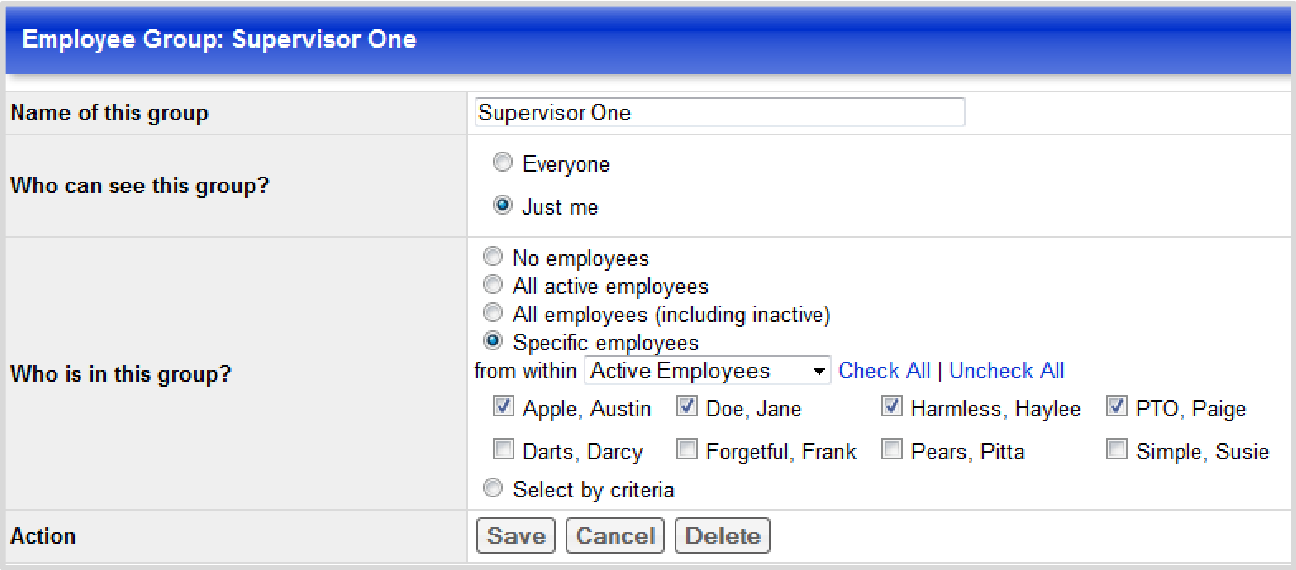
**Step 1.** From the home page, go to the "Maintenance Menu" and click on "Employee Groups." Then click "Add New Group."

**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."




**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

## Employee Groups - Assign Multiple Supervisors through a Smart Group

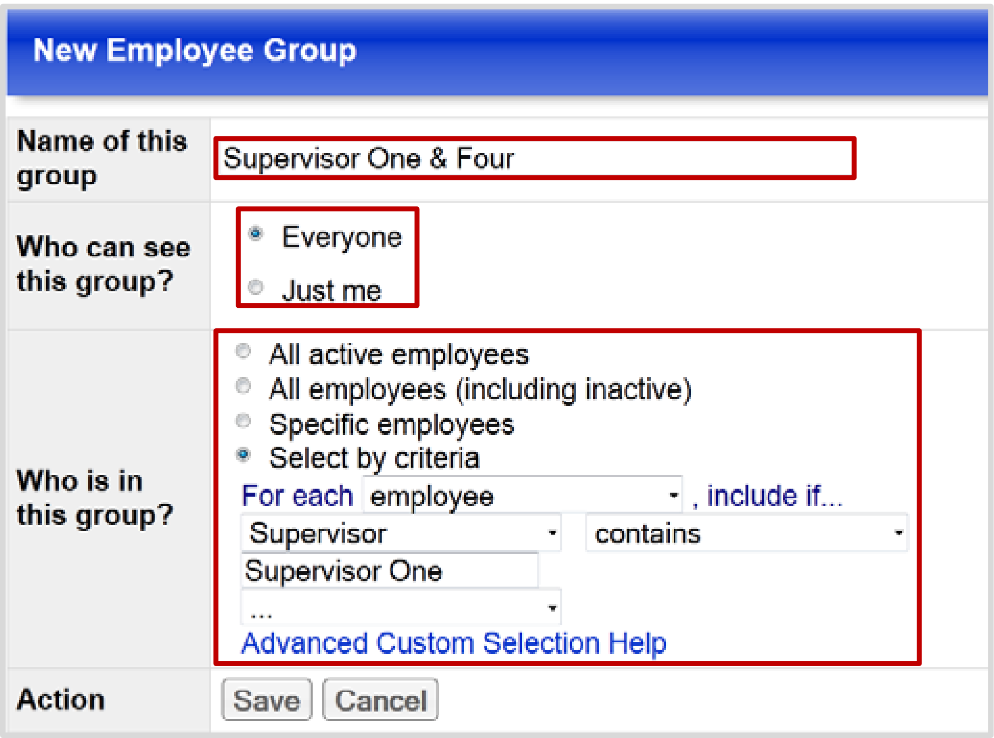
A “Smart Group” is one way to assign multiple supervisors to an employee. This is done from within the “Employee Groups” feature. An example would be setting up a “Smart Group” for any employees who have “Supervisor One” or “Supervisor Four” in the “Supervisor” field on the “Employee Setup.” See example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




**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.

## Employee Groups - Assign Multiple Supervisors/Smart Group Continued

| ✓ | Employee Name (add new) | Supervisor |
|---|---|---|
| ☐ | Apple, Austin | Supervisor Two |
| ☐ | Darts, Darcy | Supervisor One,Supervisor Three |
| ☐ | Doe, Jane | Supervisor Three |
| ☐ | Forgetful, Frank | Supervisor One,Supervisor Three,Supervisor Four |
| ☐ | Harmless, Haylee | Supervisor Two |
| ☐ | Pears, Pitta | Supervisor One,Supervisor Three |
| ☐ | PTO, Paige | Supervisor Two |
| ☐ | 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?** | ○ All active employees<br>○ All employees (including inactive)<br>○ Specific employees<br>◉ Select by criteria<br>For each employee, include if...<br>Supervisor contains Supervisor One or Delete<br>Supervisor contains<br>Supervisor Three<br>...<br>Advanced Custom Selection Help |
| **Action** | Save 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.

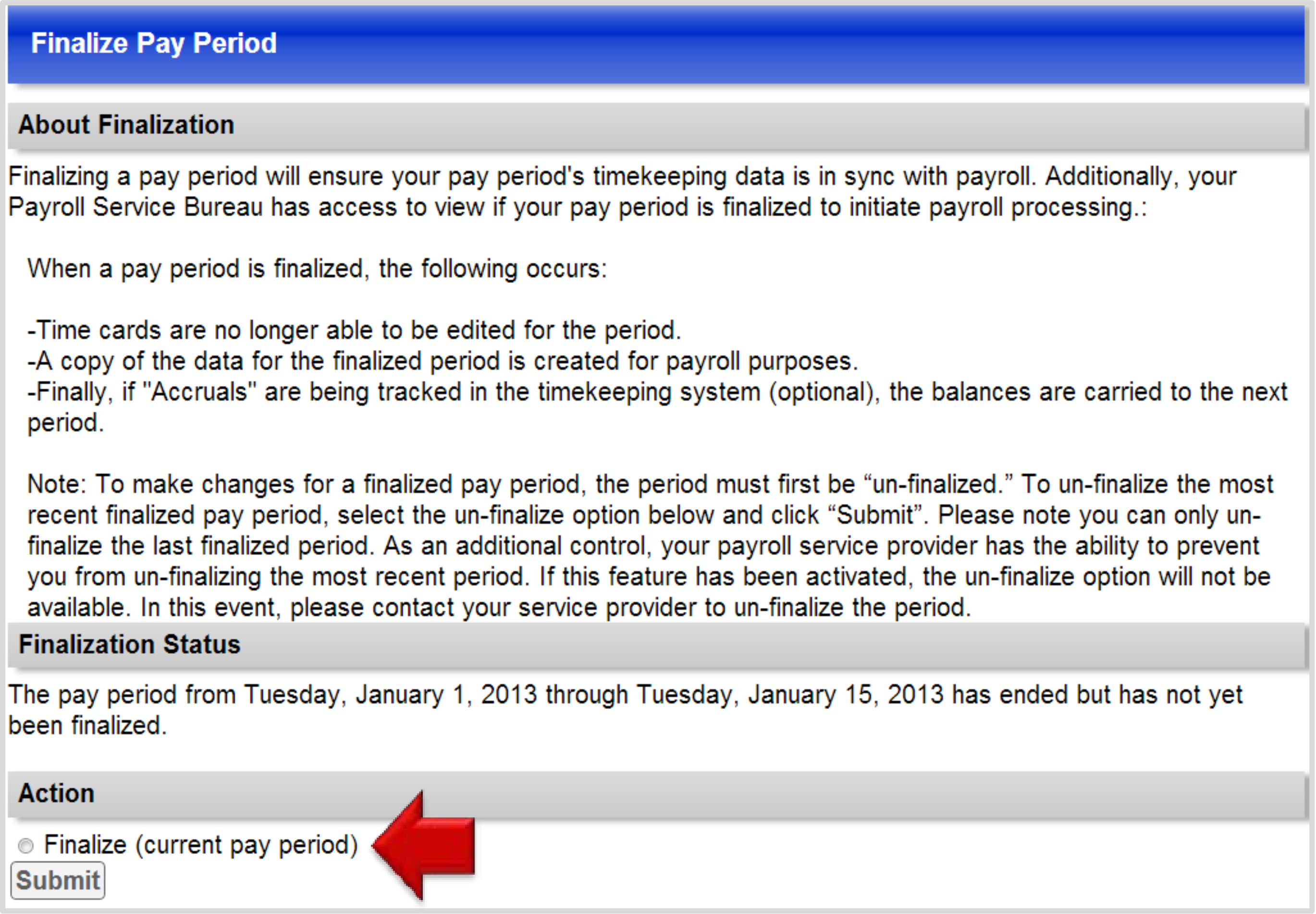
**Steps to Finalize a Pay Period:**

**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)

Submit

## Un-Finalize Pay Period

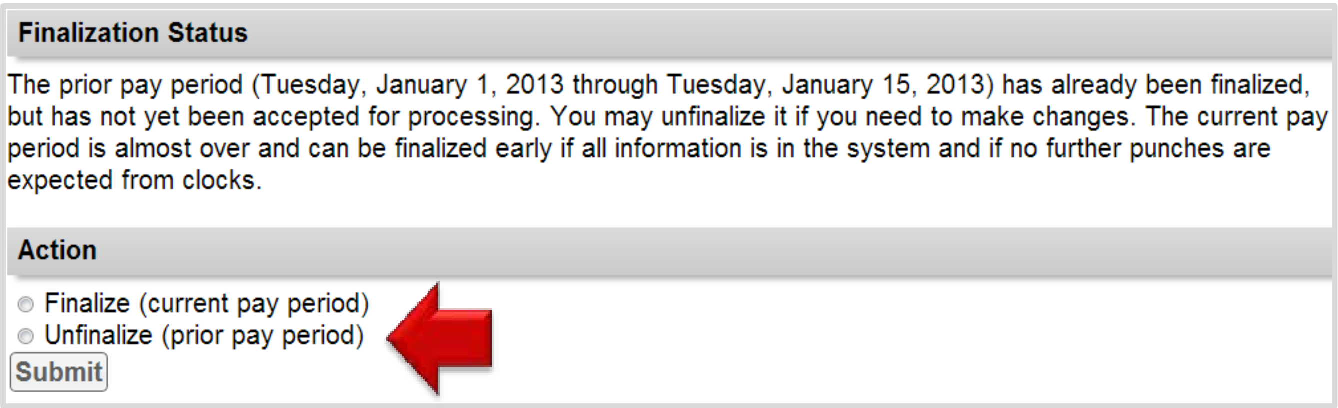
**Step 1.** Click on the “Maintenance Menu” to open its list of options. Then select “Finalize Pay Period.”

**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.



# Maintenance Menu

## Manage Clock Prompts

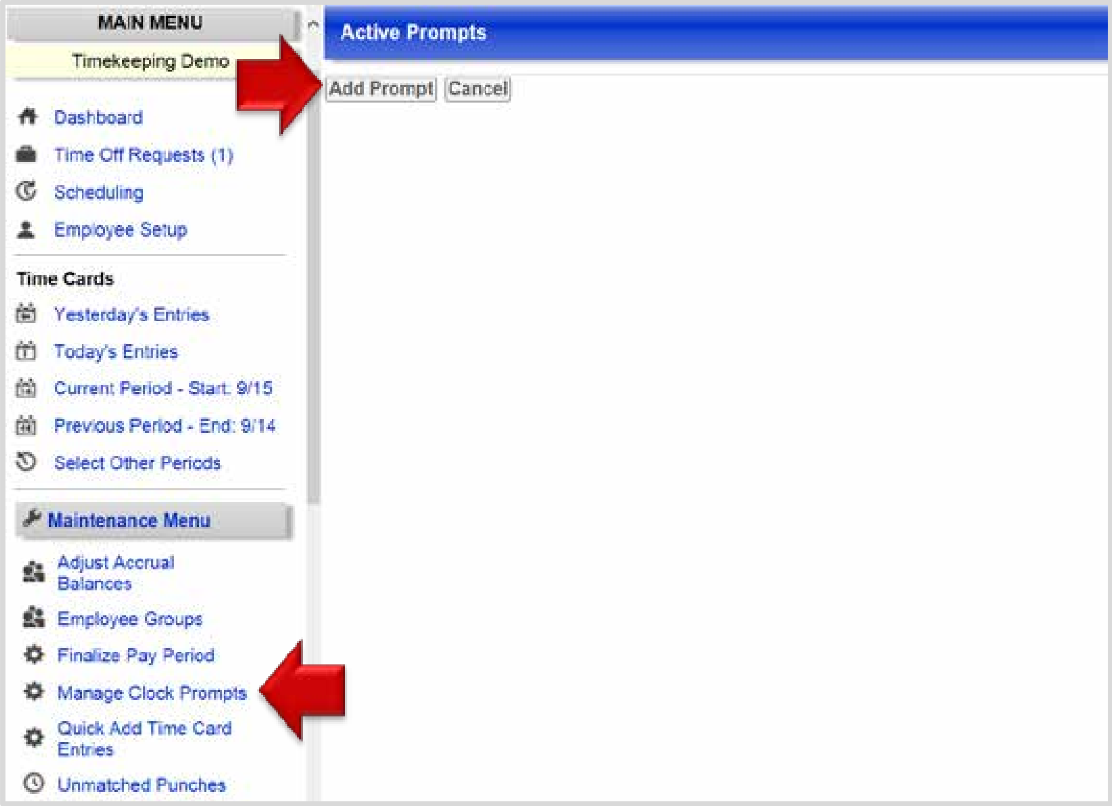
Clock prompts are questions that a time clock or WebClock asks an employee at the punch-IN or punch–OUT time. These prompts can be set to collect labor or numerical data which can be used for reporting.

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.

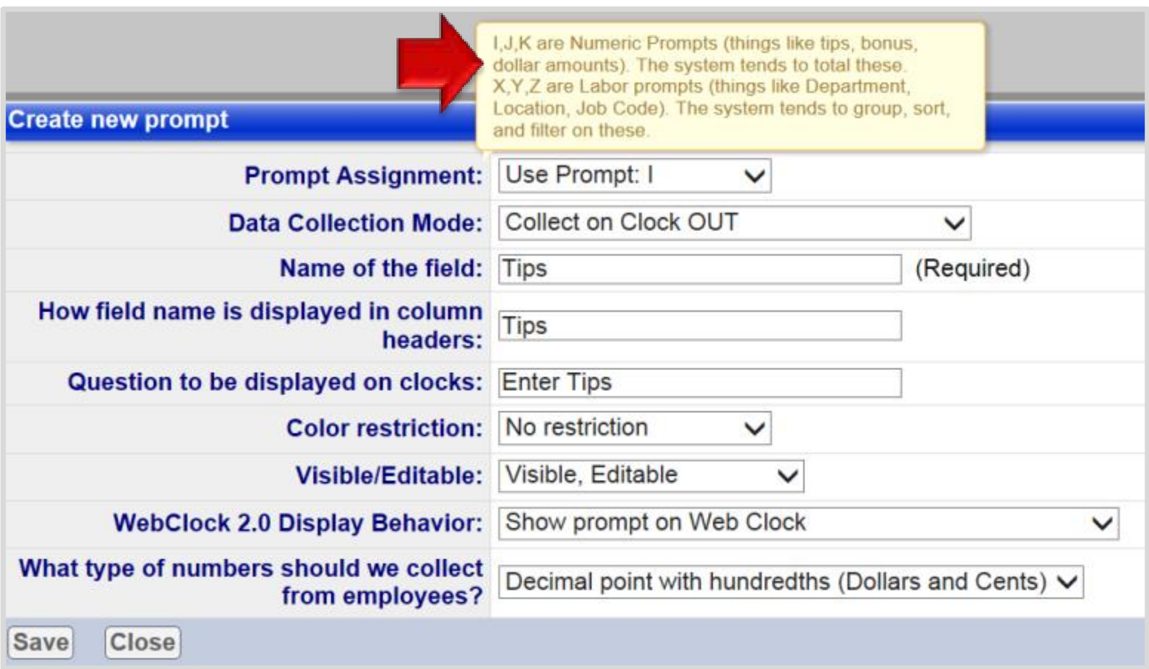
# Maintenance Menu

## 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).”




**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.

## Manage Clock Prompts Continued

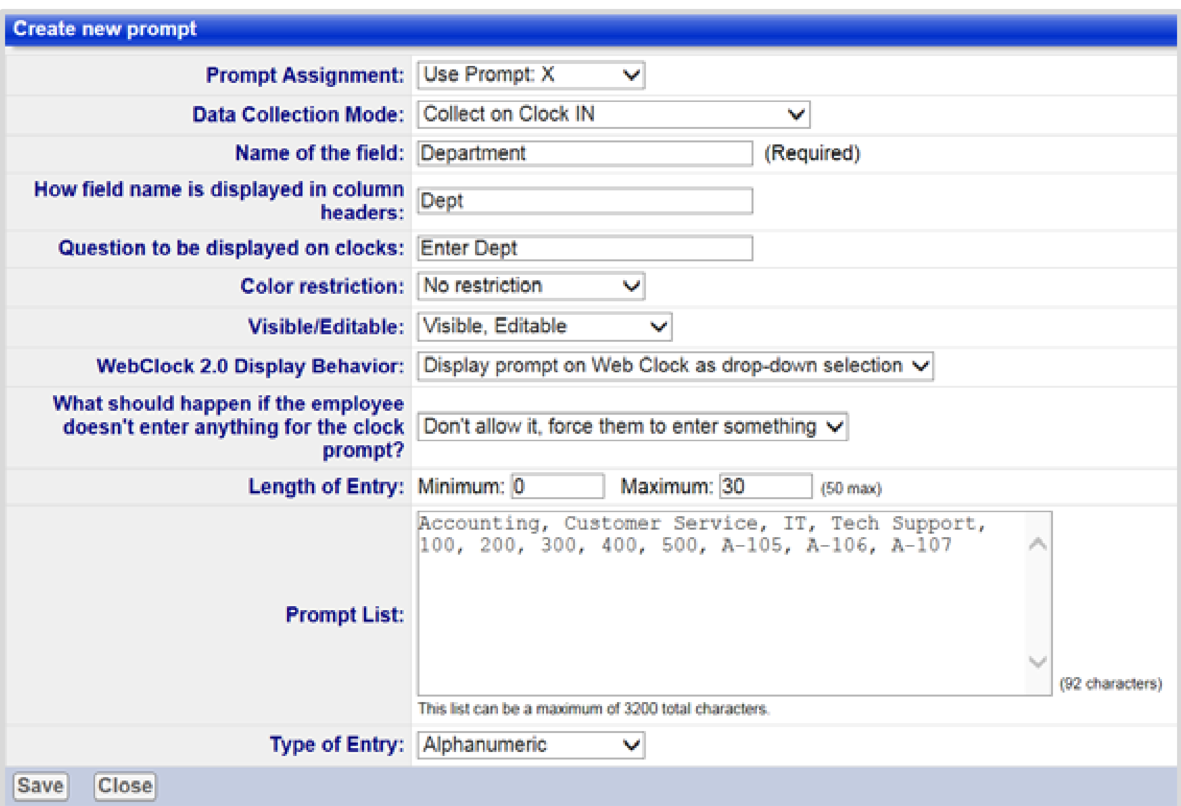
- **Data Collection Mode:** Choose from three options to collect data including “Collect on Clock IN,” “Collect on Clock OUT” and “Show online, but do not collect anything.”
- **Name of the field:** Name the prompt for use on the time card, and reports.
- **How field name is displayed in column headers:** 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.

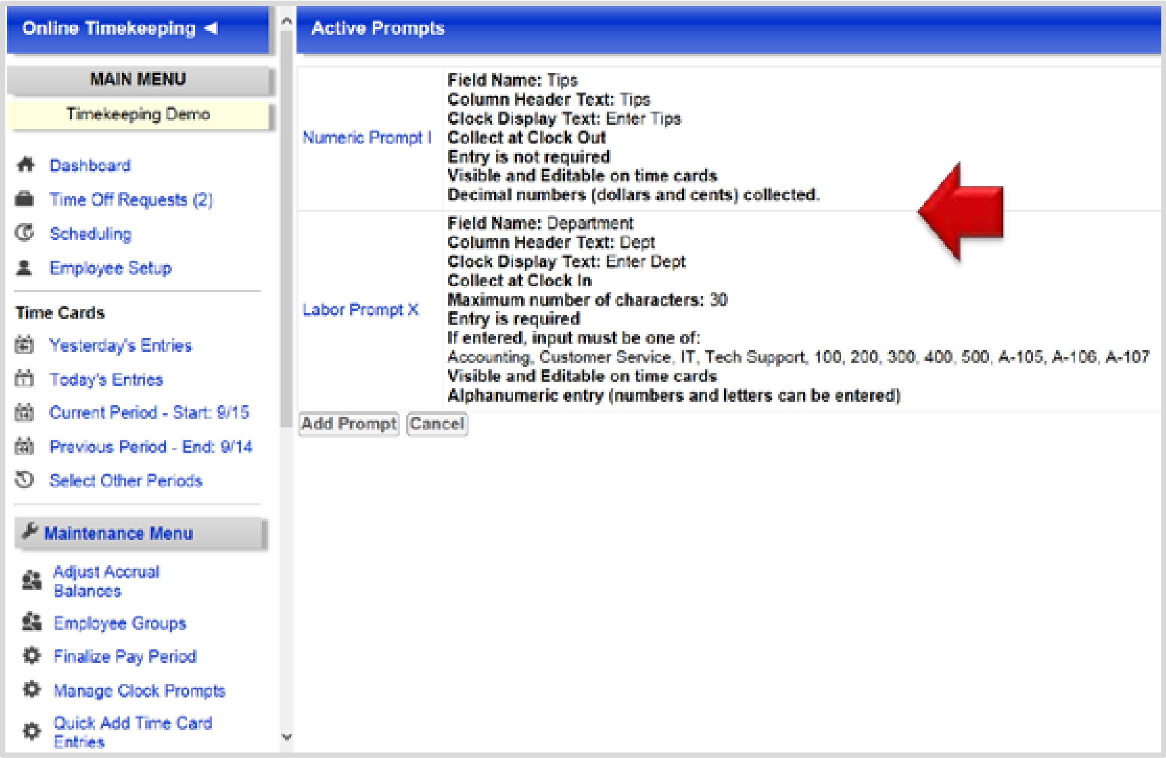
- **Type of Entry:** This gives you two options to select whether the prompt list entries are “Numeric” or “Alphanumeric.”



# Maintenance Menu

## Manage Clock Prompts Continued

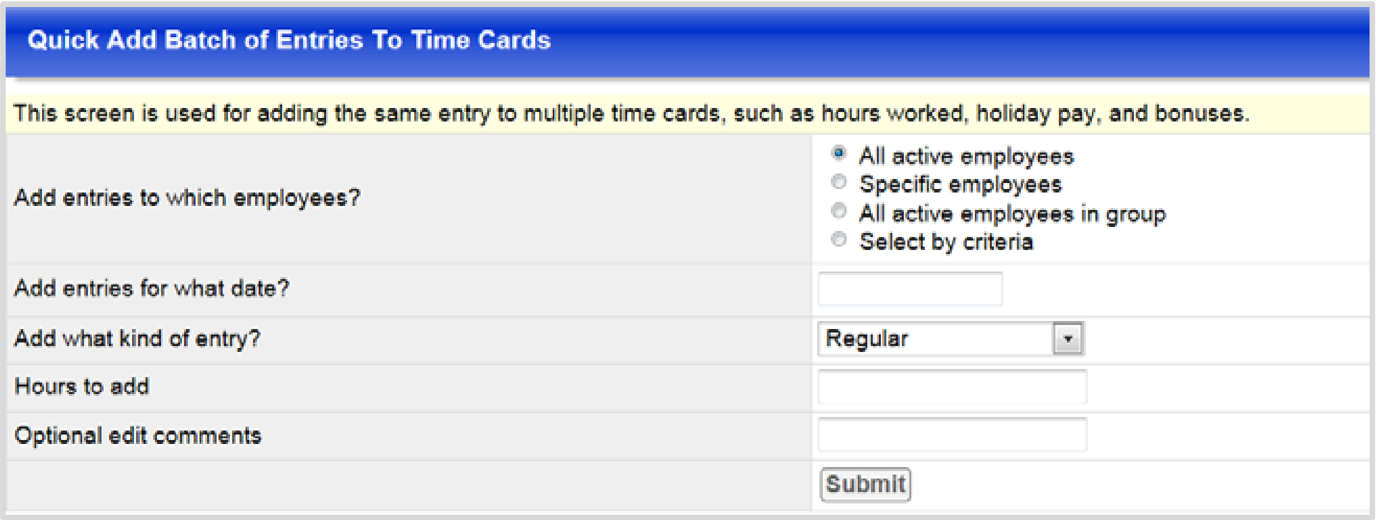
**Step 6.** Click "Save" when done. You should now see both prompts listed on the "Manage Clock Prompts" page.




**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.

## 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.



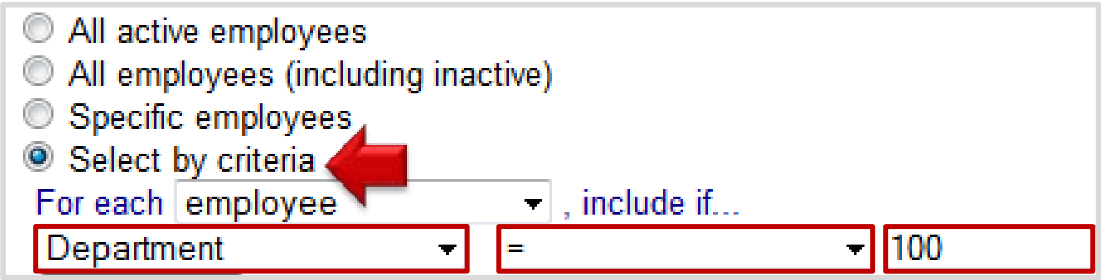
## Unmatched Punches

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.

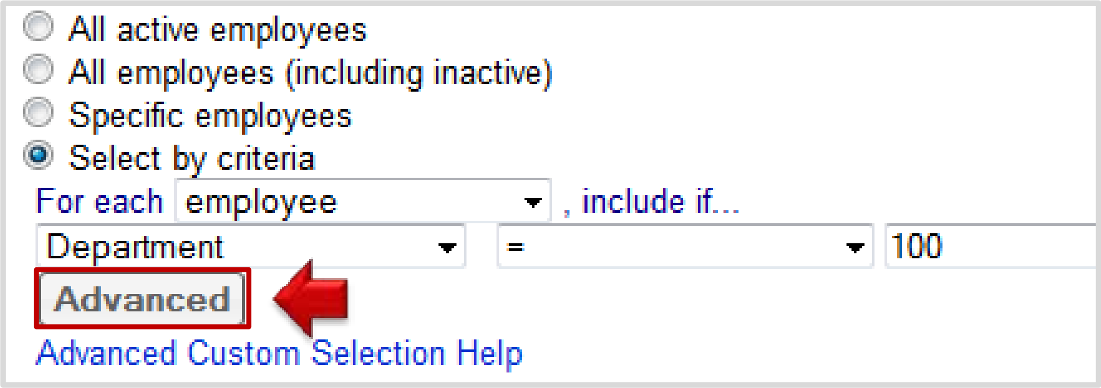
## Select by Criteria

"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."

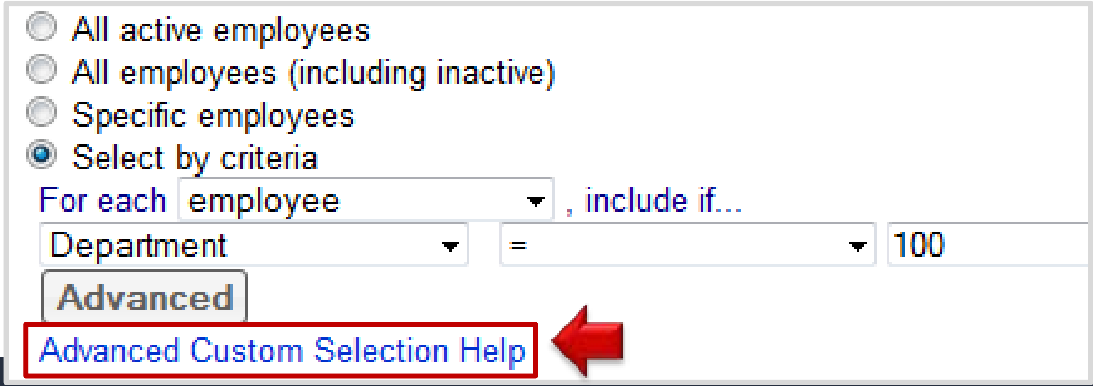
In the example below, the "Select by Criteria" is set to search for any employee who has department 100 set in the "Department" field in their "Employee Setup" profile.




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




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



## 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

## 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.

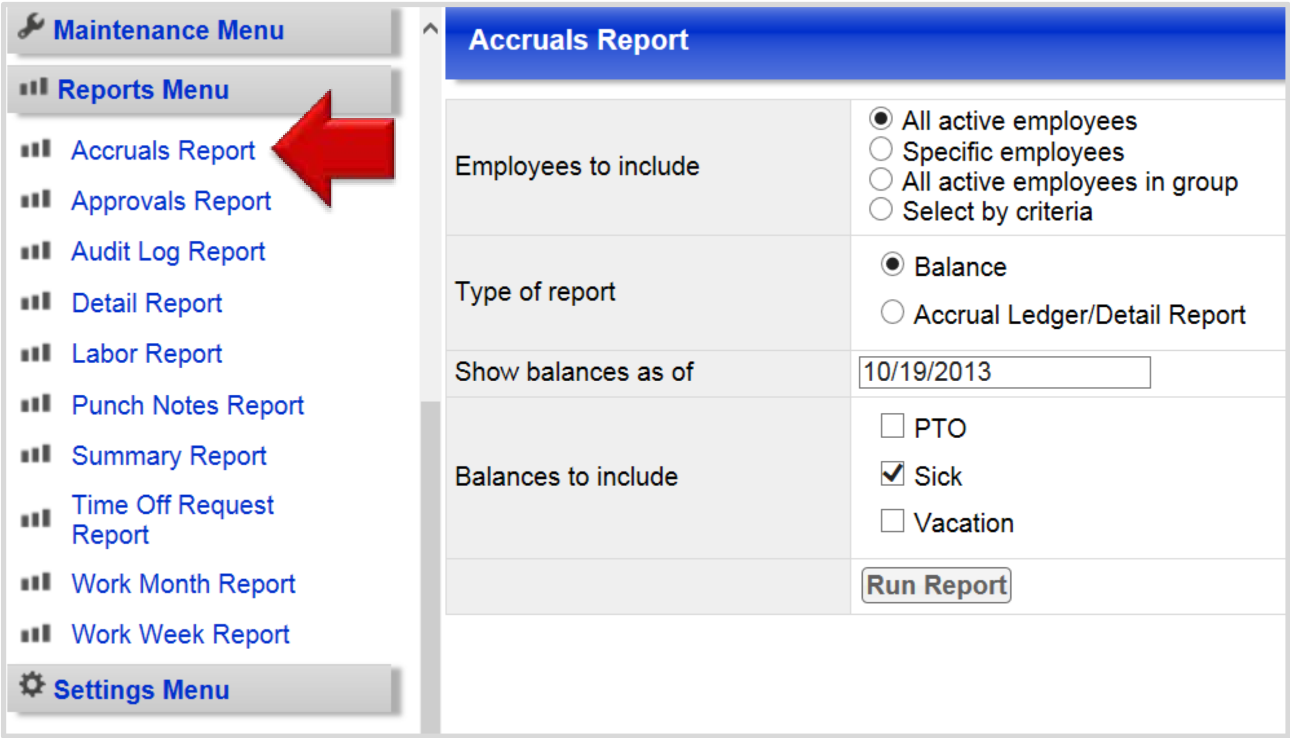
**Step 2.** Click "Accruals Report."

**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."

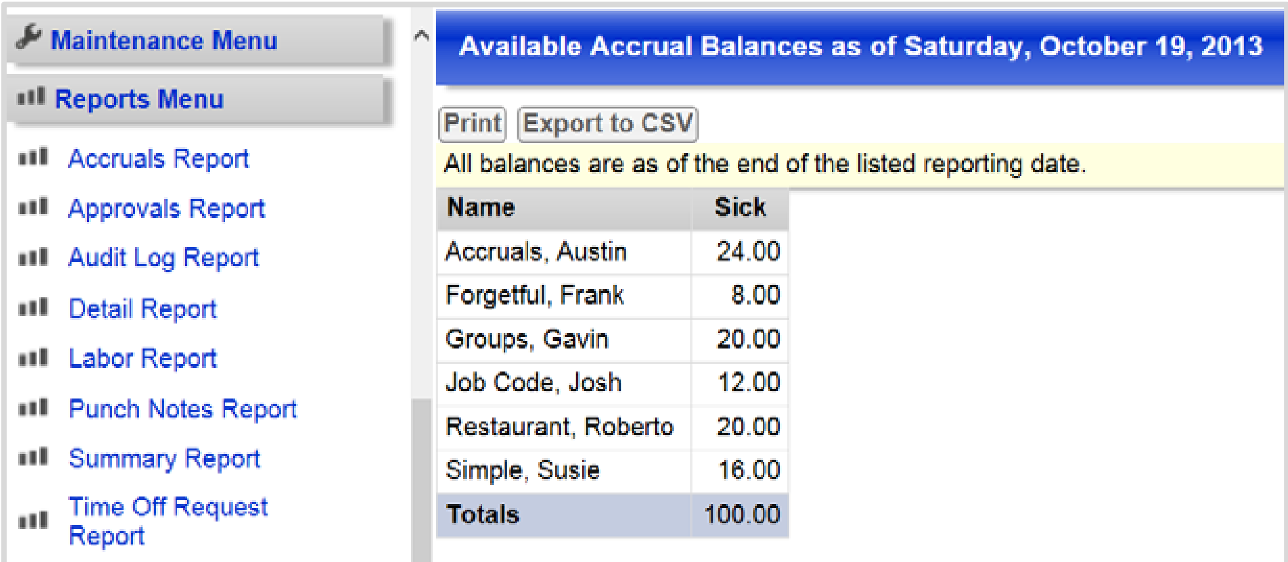



**Step 7.** You have three options: "Print," "Export to CSV," or to view the report online.

# Reports Menu

## Accruals Report - Continued

Example of a “Balance Report:”




Example of an “Accrual Ledger/Detail Report:”

## 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.


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

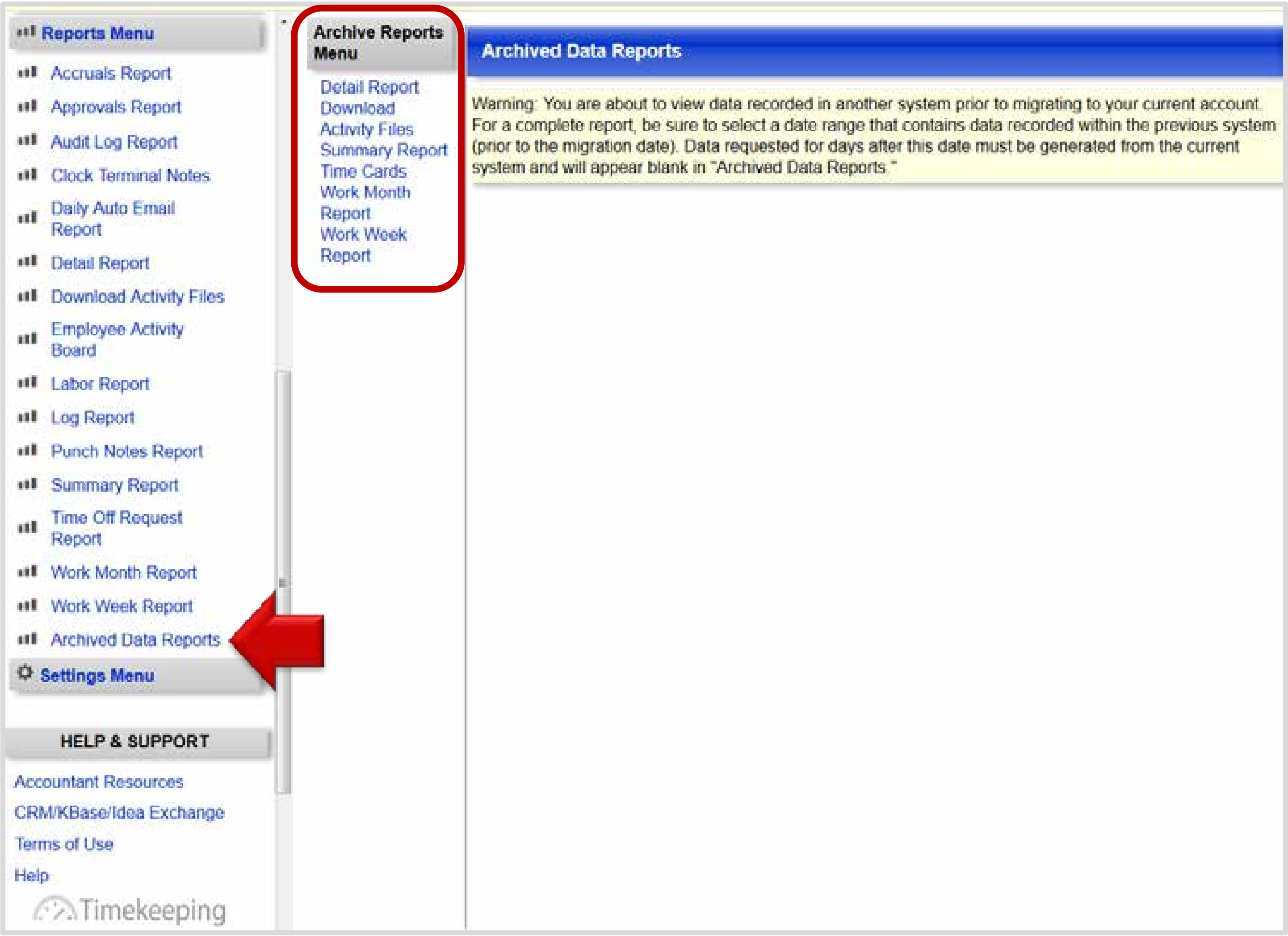
## Archived Data Report

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.



## 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.

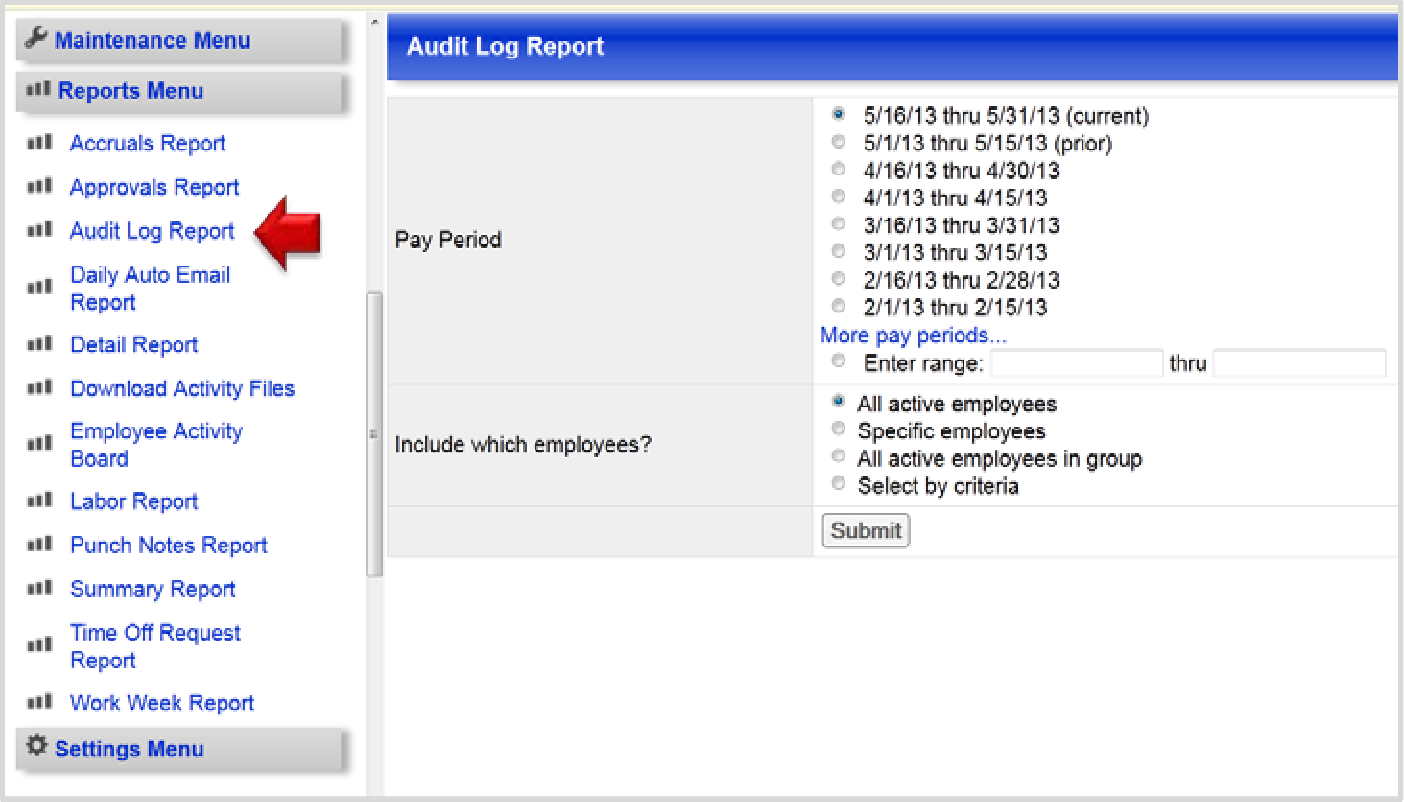
**Step 1.** To run the "Audit Log" report, select "Reports Menu" from the left pane.

**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.

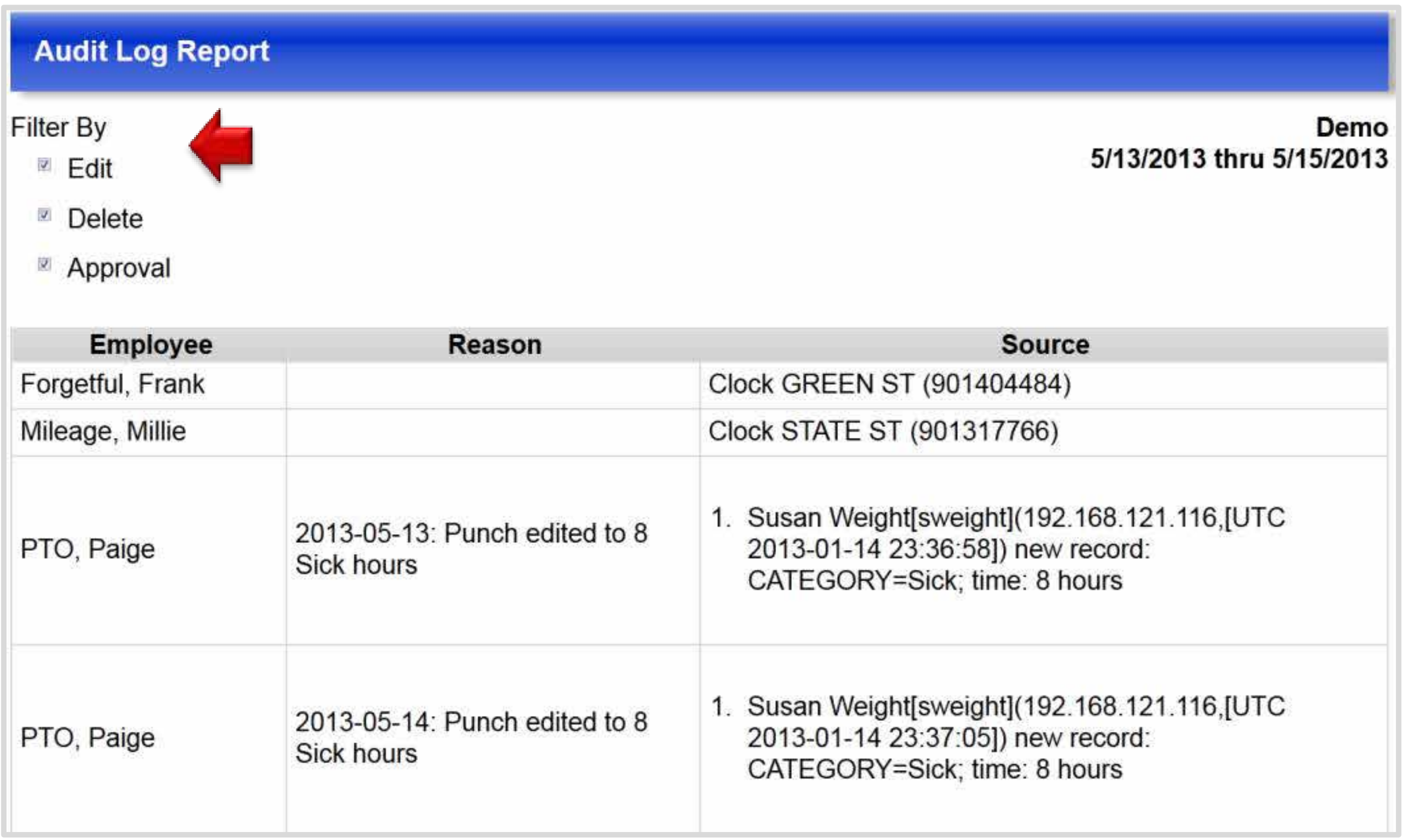
**Step 5.** Click "Submit."



## 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**

Filter By
- Edit
- Delete
- Approval

**Demo**
**5/13/2013 thru 5/15/2013**

| 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

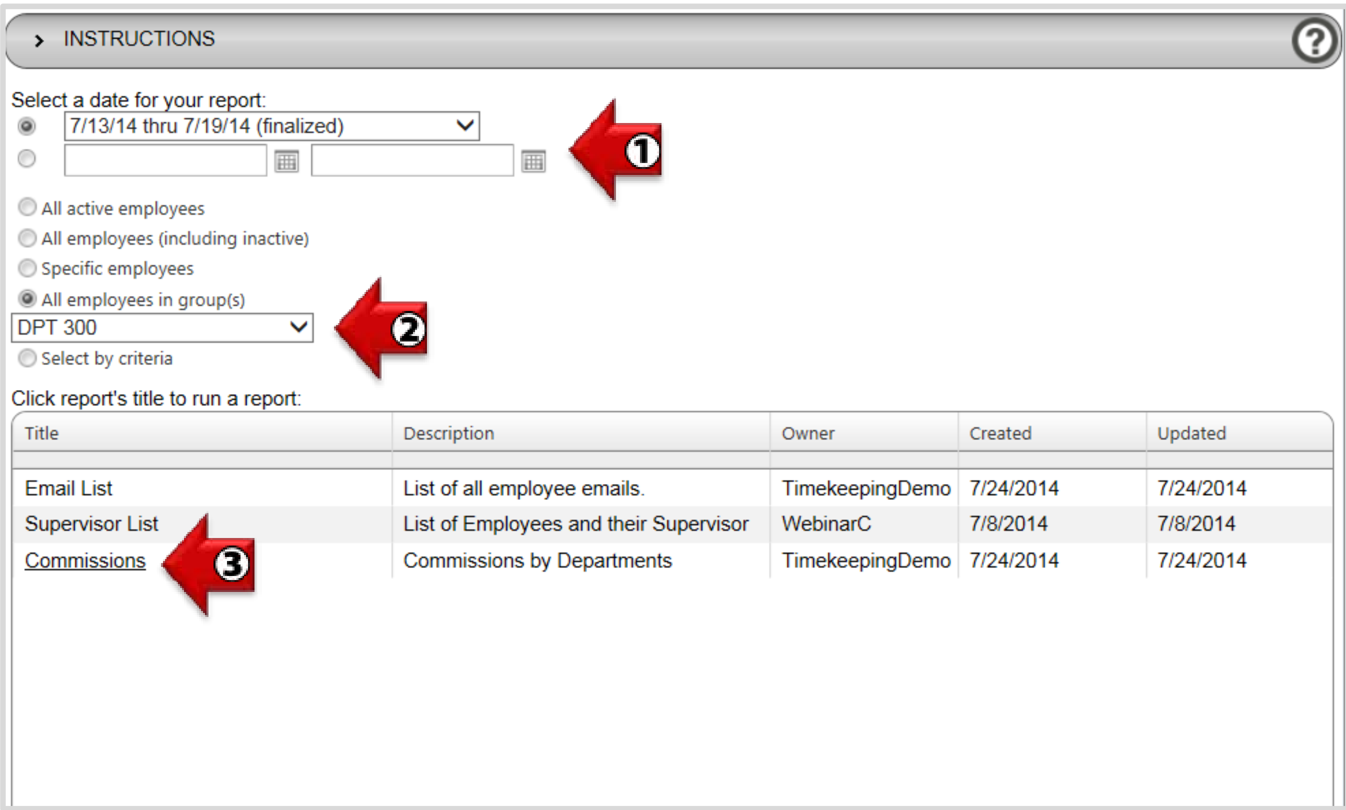
Custom Reports will help you get the data you need from your timekeeping system. Through the custom reports section you will be able to choose a date, the employees to include, and select any of the reports listed in the report section. Since the reports are basically a template of selected settings,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

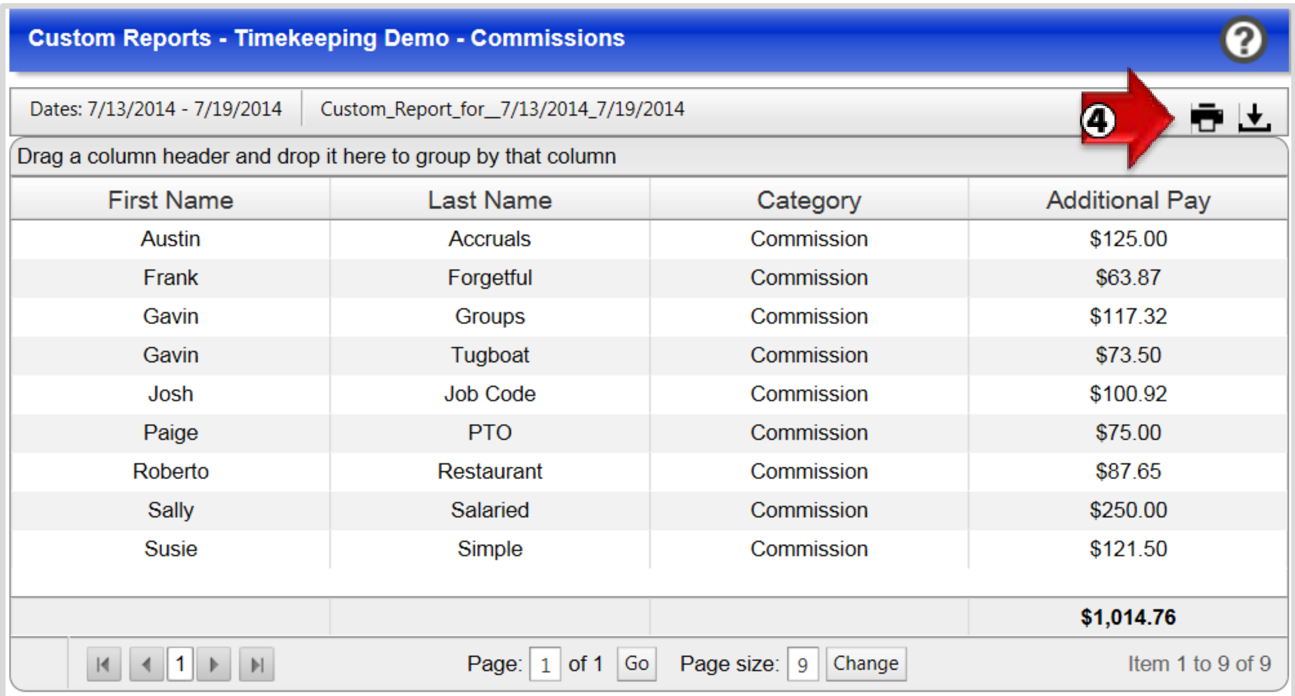
**Step 2**. Decide which employees to include in the report.

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



## 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.




| 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** |

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.

## Custom Reports - Manage Custom Reports

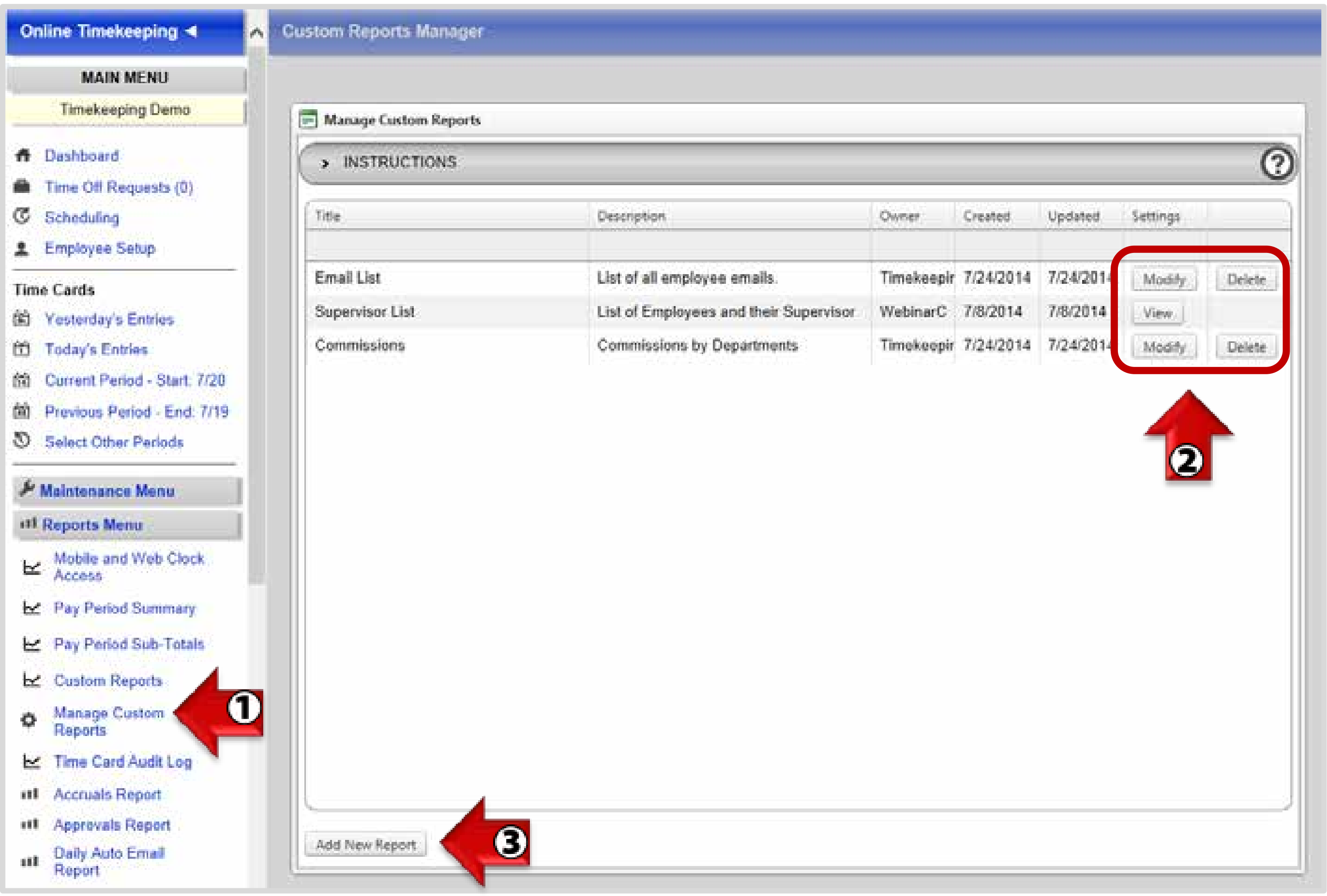
The “Manage Custom Reports” feature gives those with client level logins the ability to write their own custom reports. As the creator of the report you will have the ability to modify or delete the reports you created. Permissions can be given to allow supervisor level logins the ability to view specific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

**Step1**. 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.



*(Illustration 1.1)*

## 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).

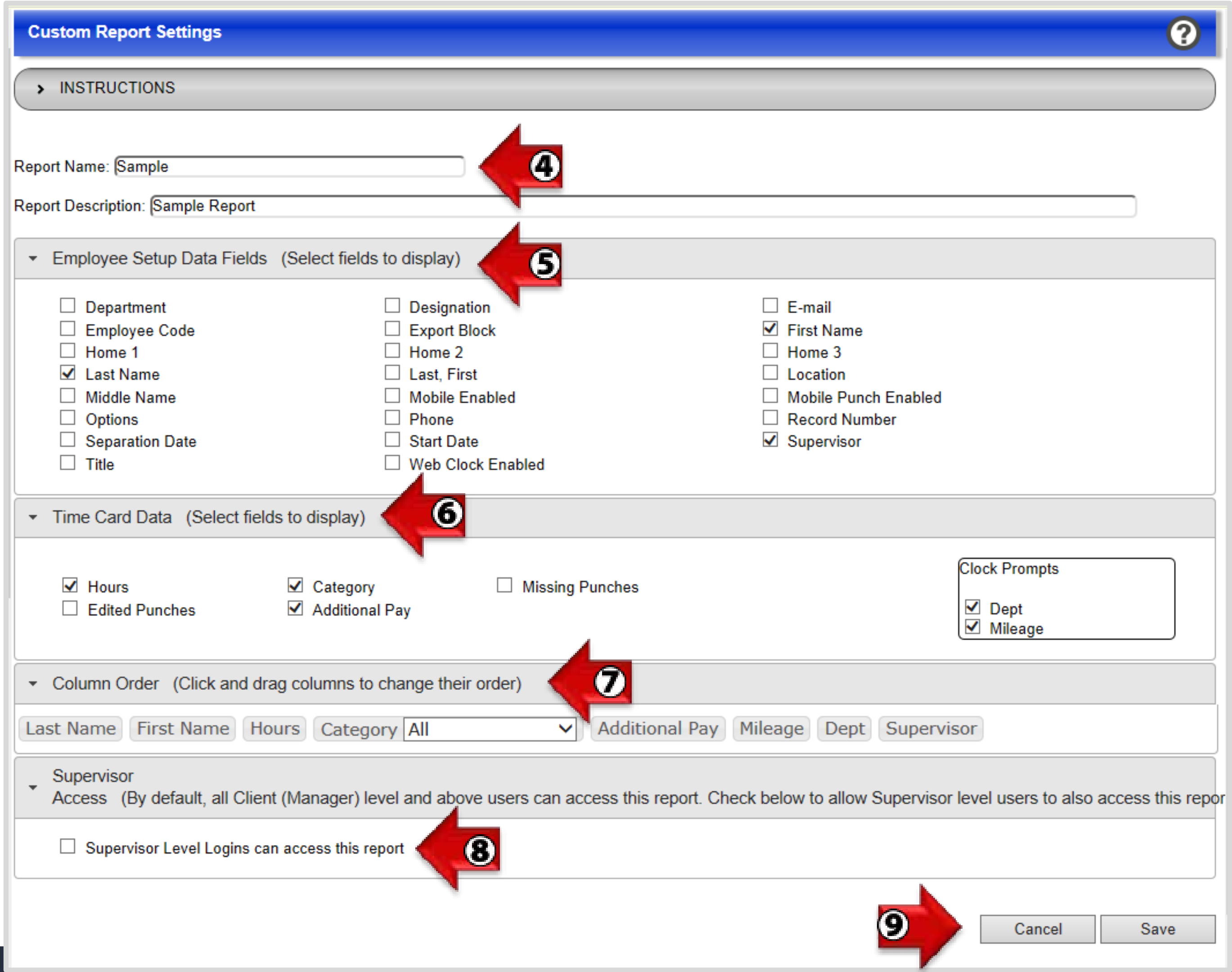
**Step 5**. Select which fields from the “Employee Setup” page to include on the report.

**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).

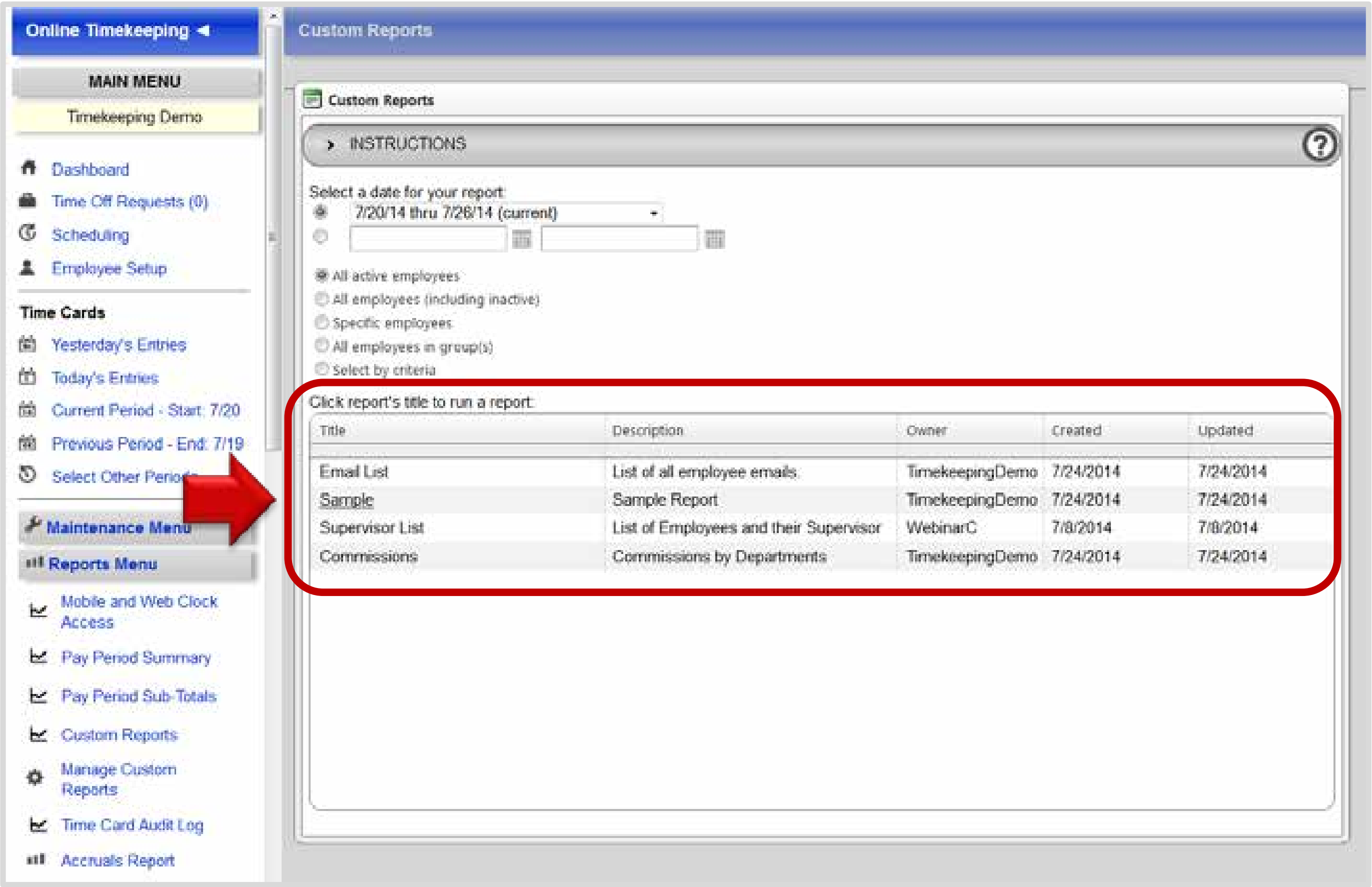



*(Illustration 1.2)*

# 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."



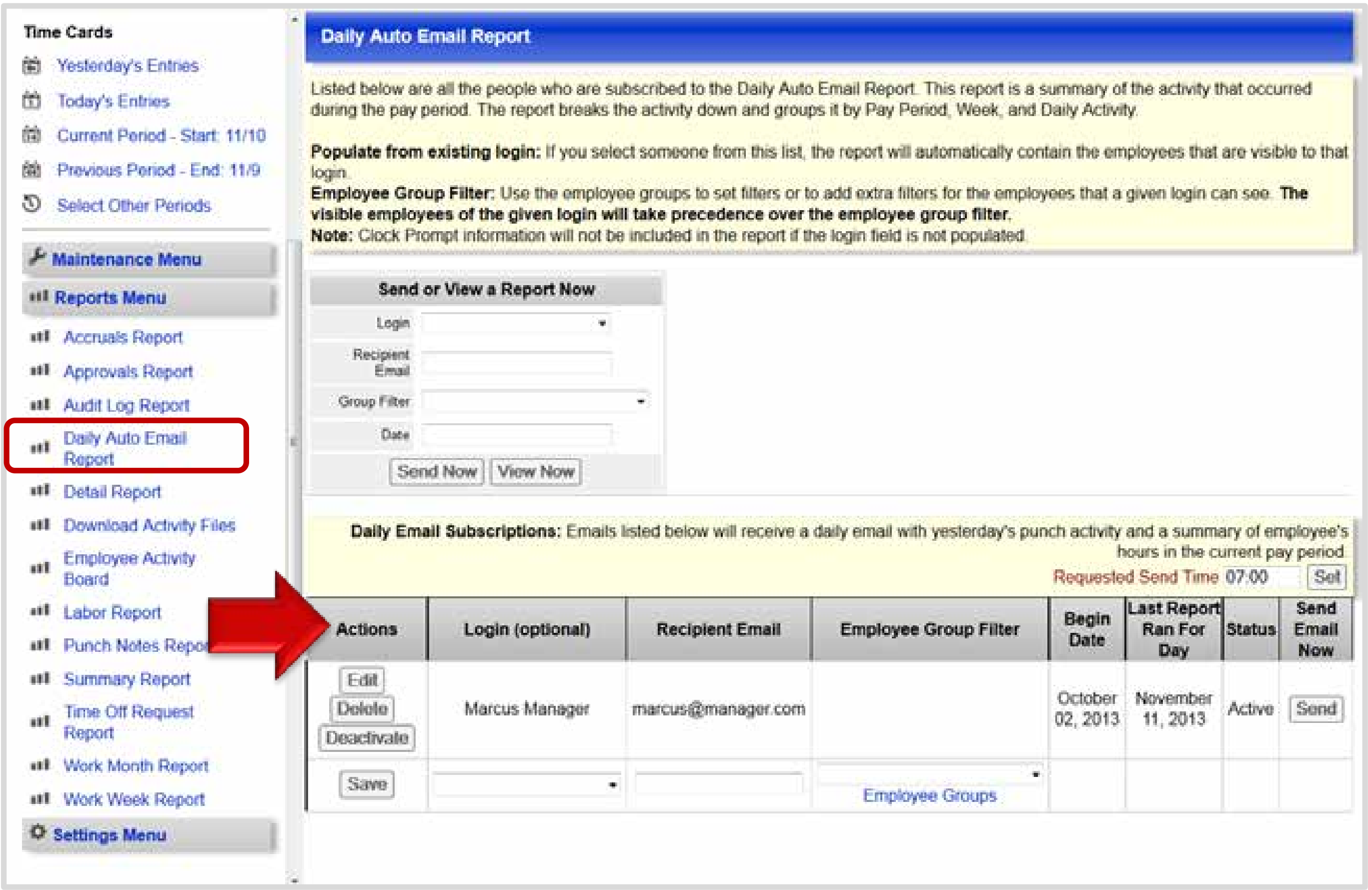

*(Illustration 1.3)*

# 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).



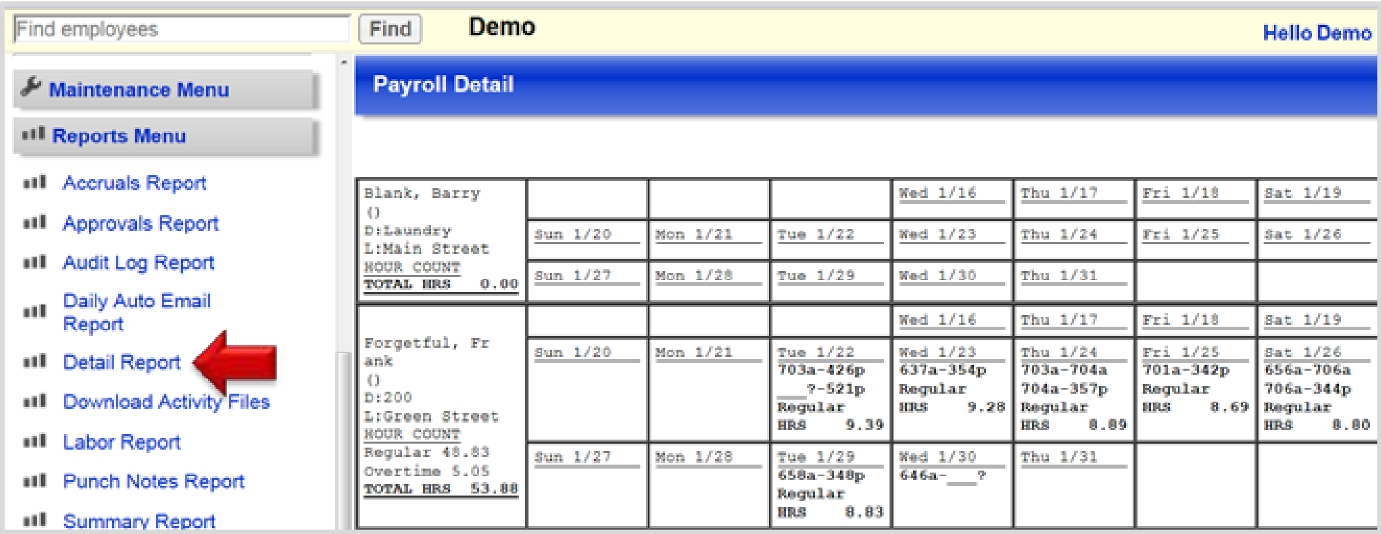

From the subscription screen, you may operate in several ways:

**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.

## 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.



## 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”.

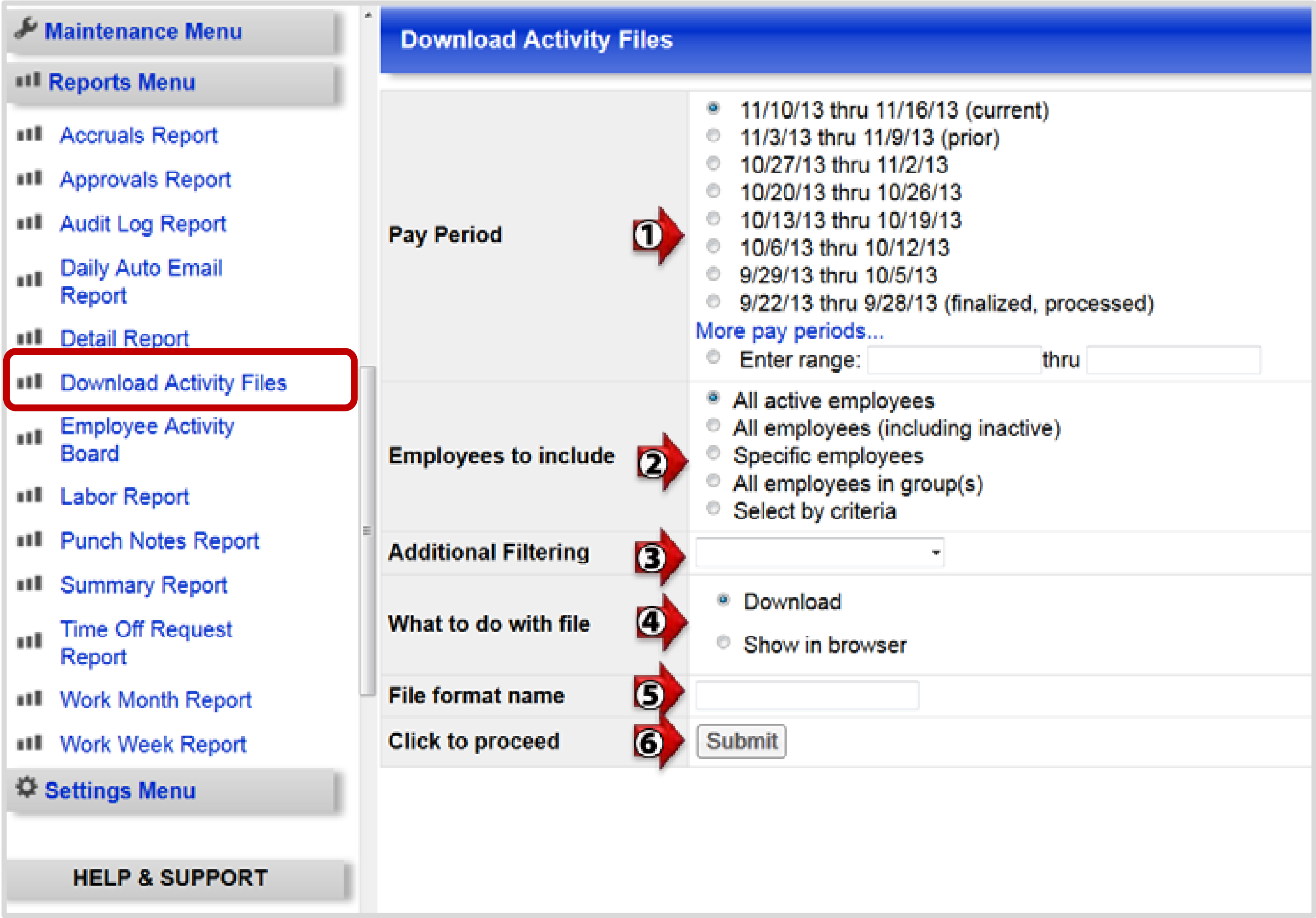
**Step 2.** Select “All Employees” or use the filter options to select specific employees.

**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.

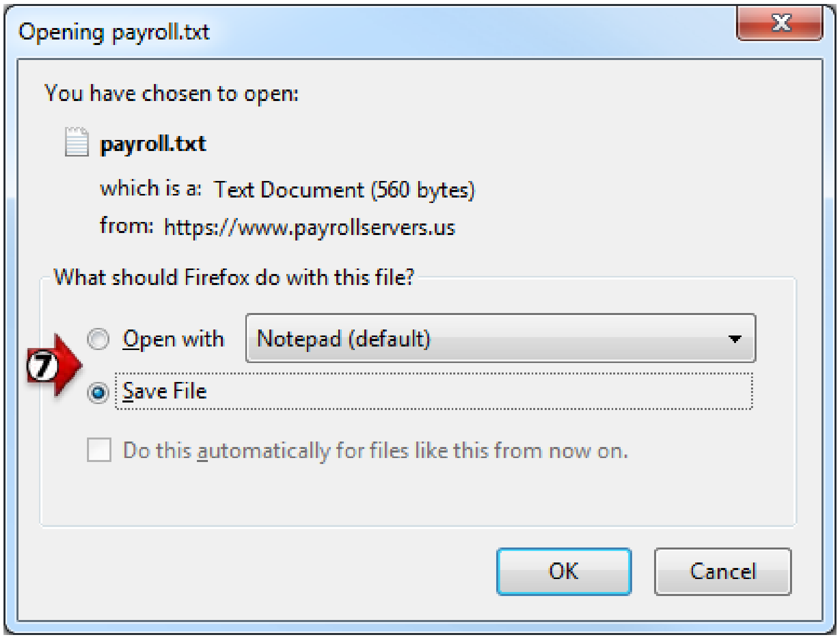
**Step 5.** Enter the custom file format code. If you don’t know the format code, contact your service provider.

**Step 6.** Click the “Submit” button.



## 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.



## Employee Activity Board Report

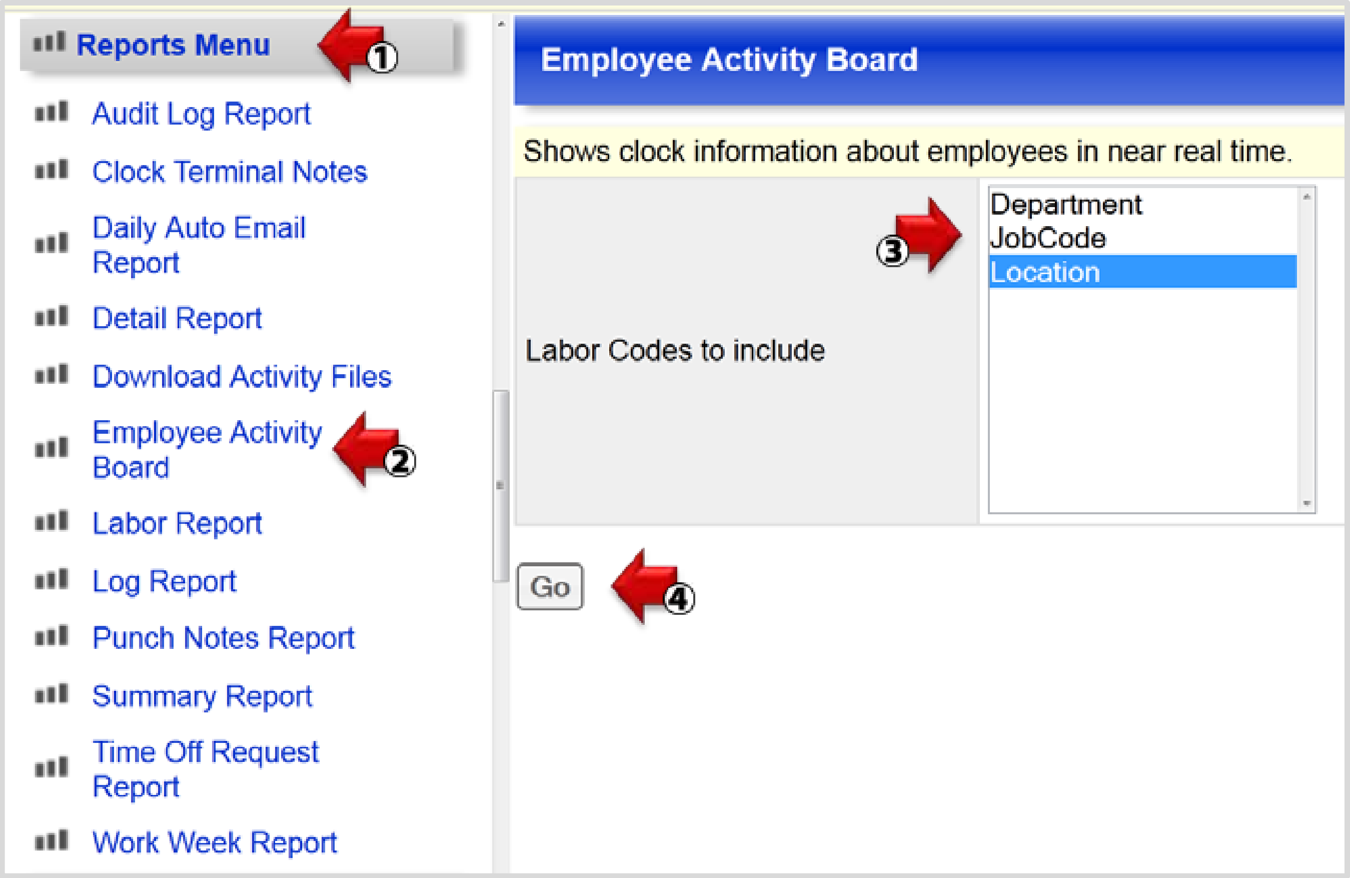
The “Employee Activity Board” report is best used for an employer or supervisor to view the In/Out status of employees, at a glance, as well as their current job code, department, location, etc., collected by a prompt.

**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.



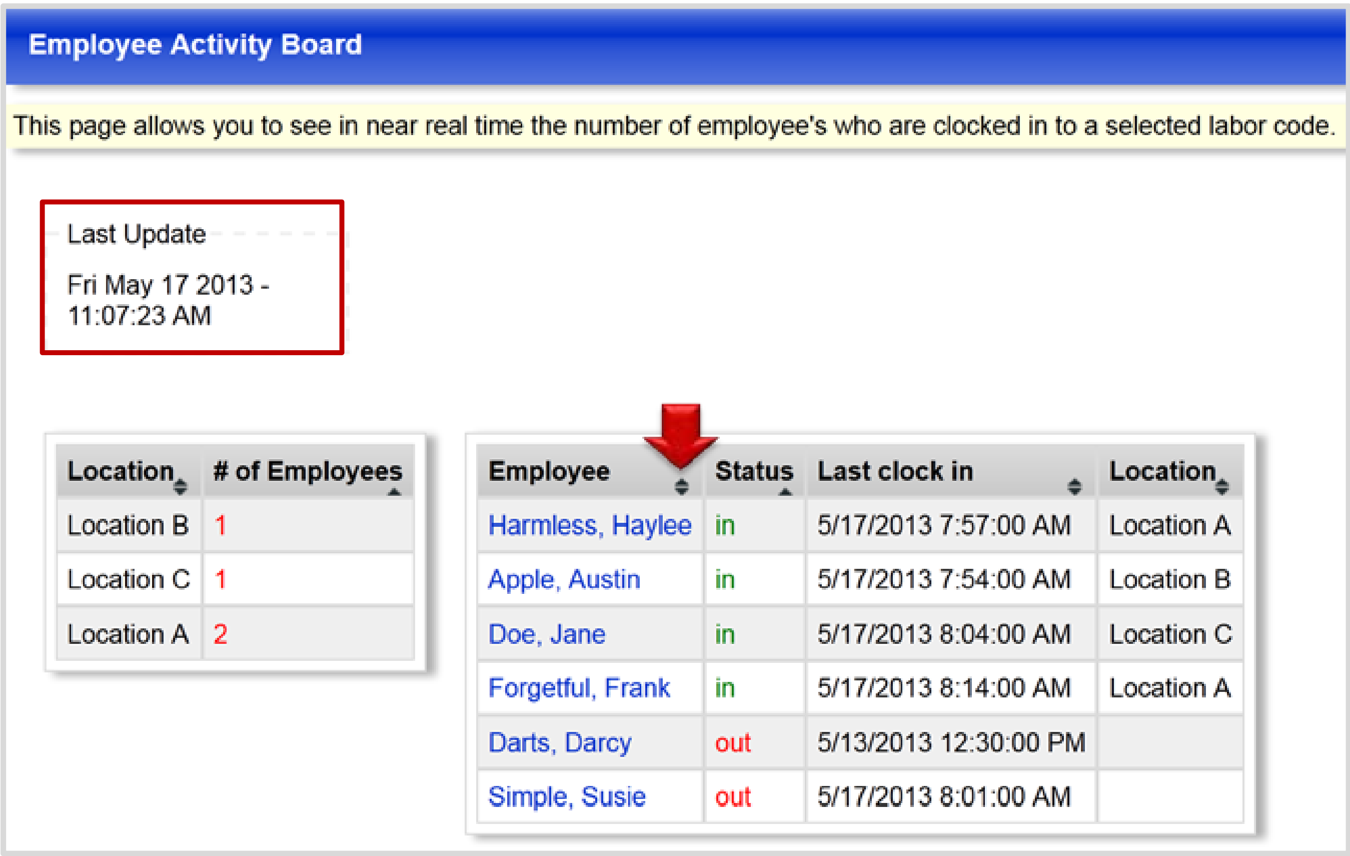
# Reports Menu

## 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.

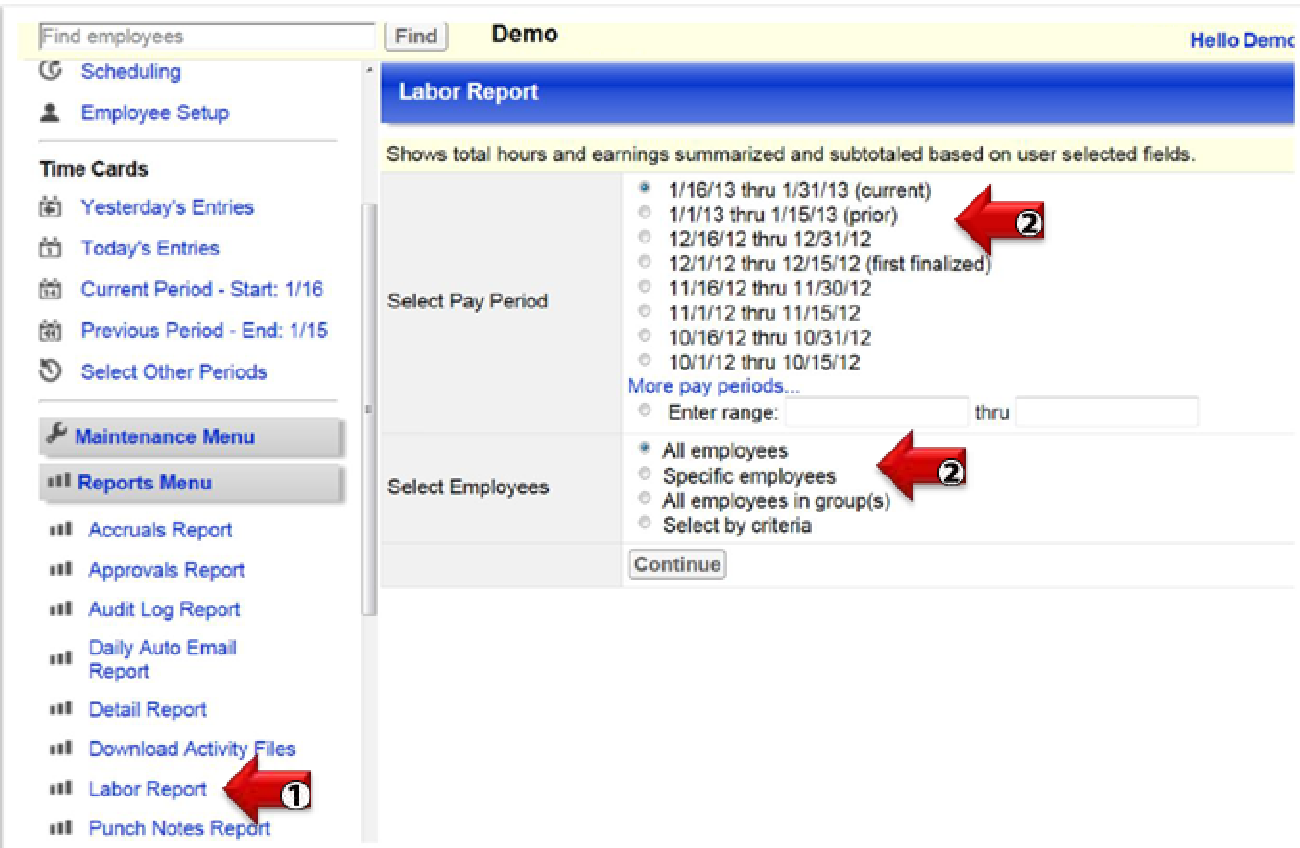


## Labor Report

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.

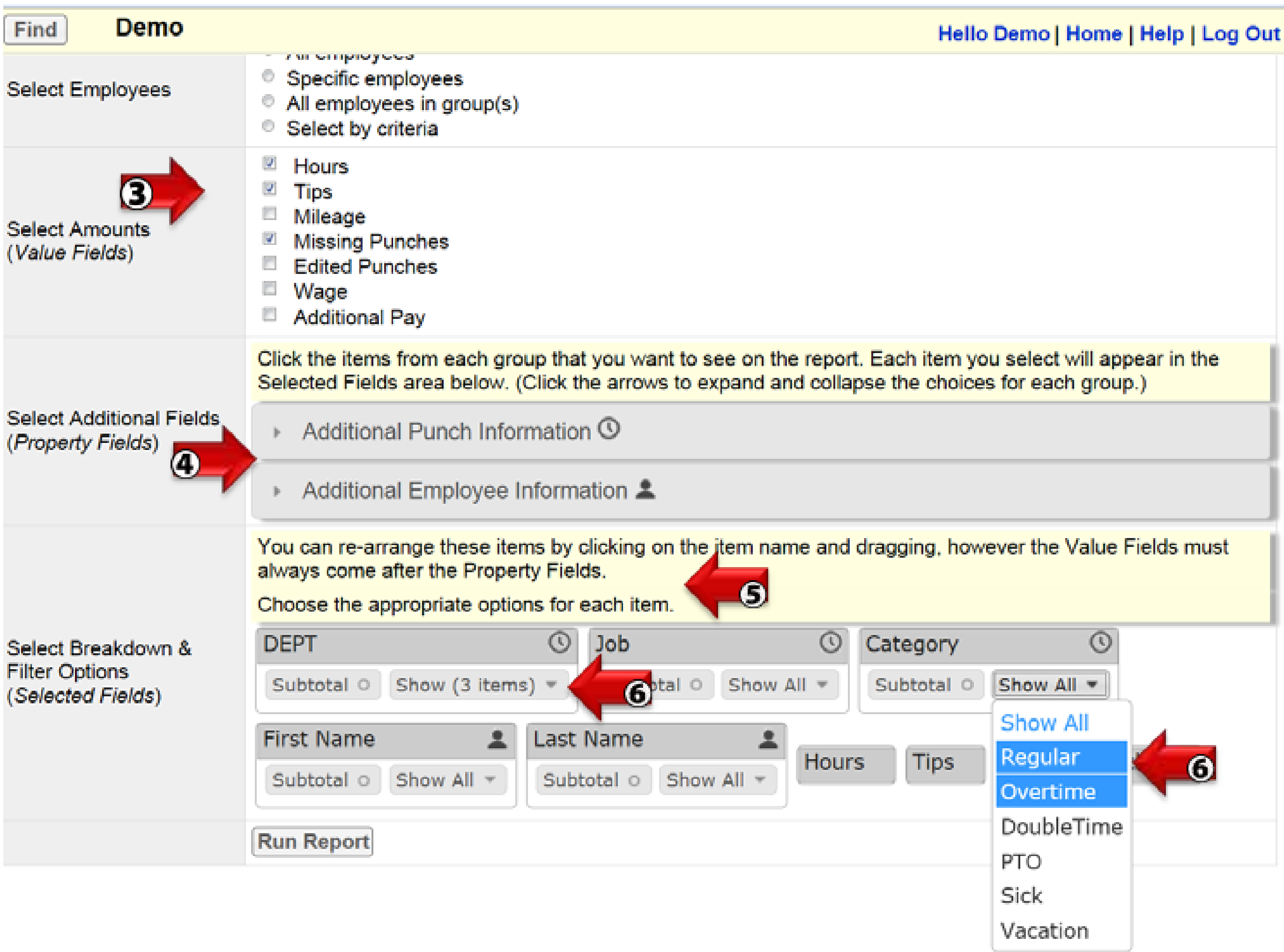
**Step 4.** The Property Fields include Punch Information: Pay Categories, Labor Prompts and Pay Rates. Additional Employee Information can also be added to the report which is all data collected from the Employee Setup page.

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

## 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.




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

## 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.

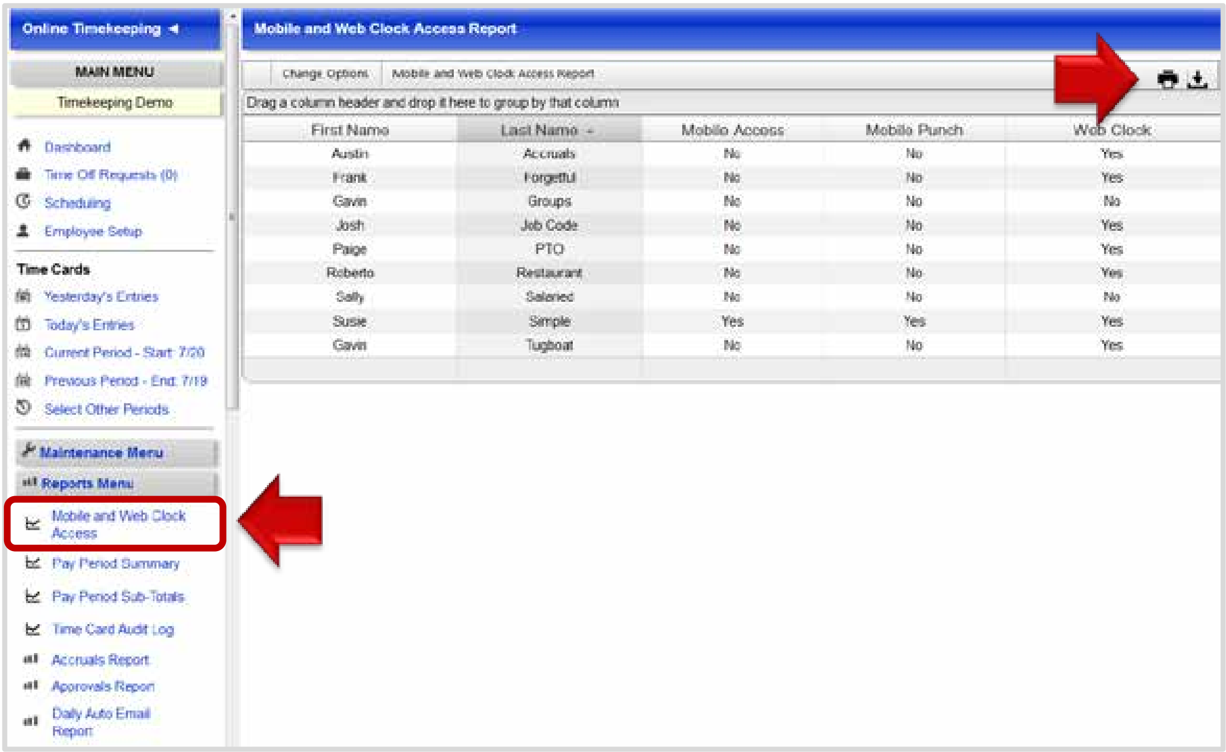
To view the report, follow the steps below.

**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.

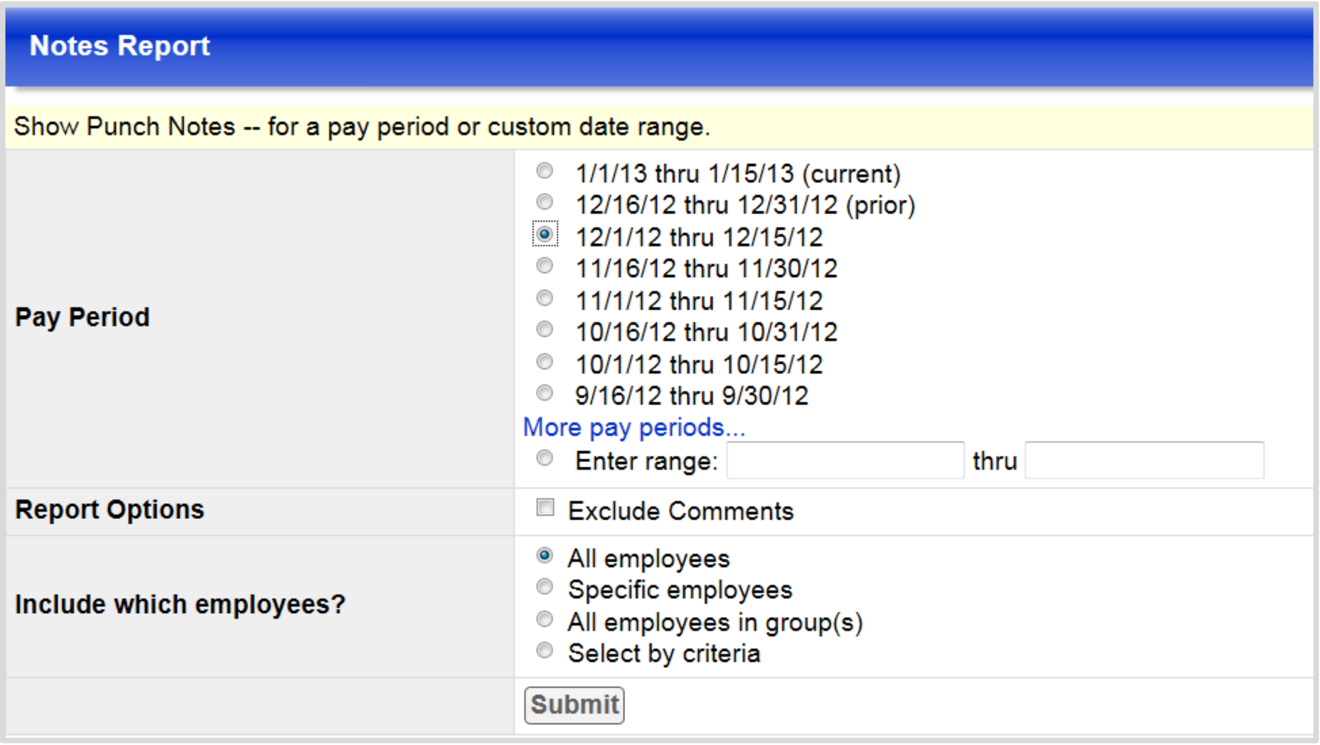


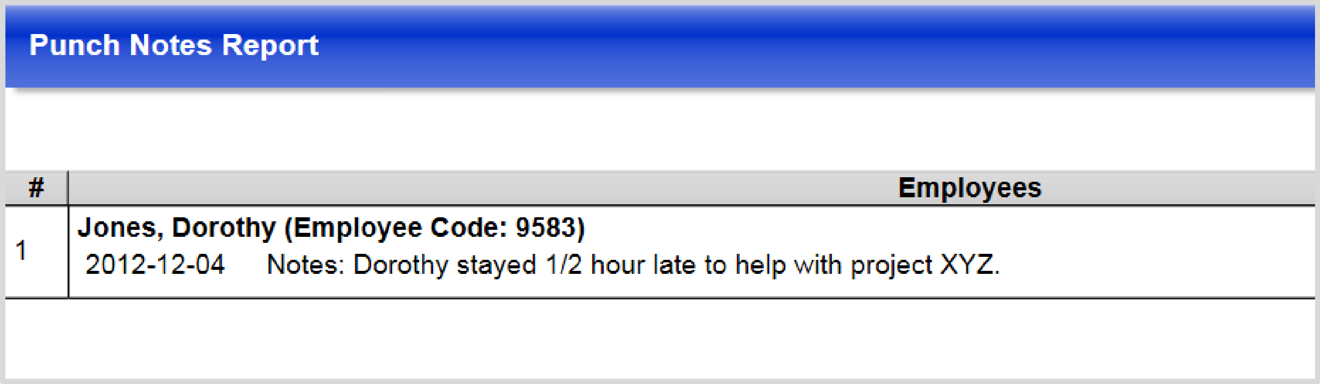

The report also allows the following functionality:

- 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 untinl the double ended arrow appears.
- Column headers can be used to grop the columns by clickin 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.

## 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.



## 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.

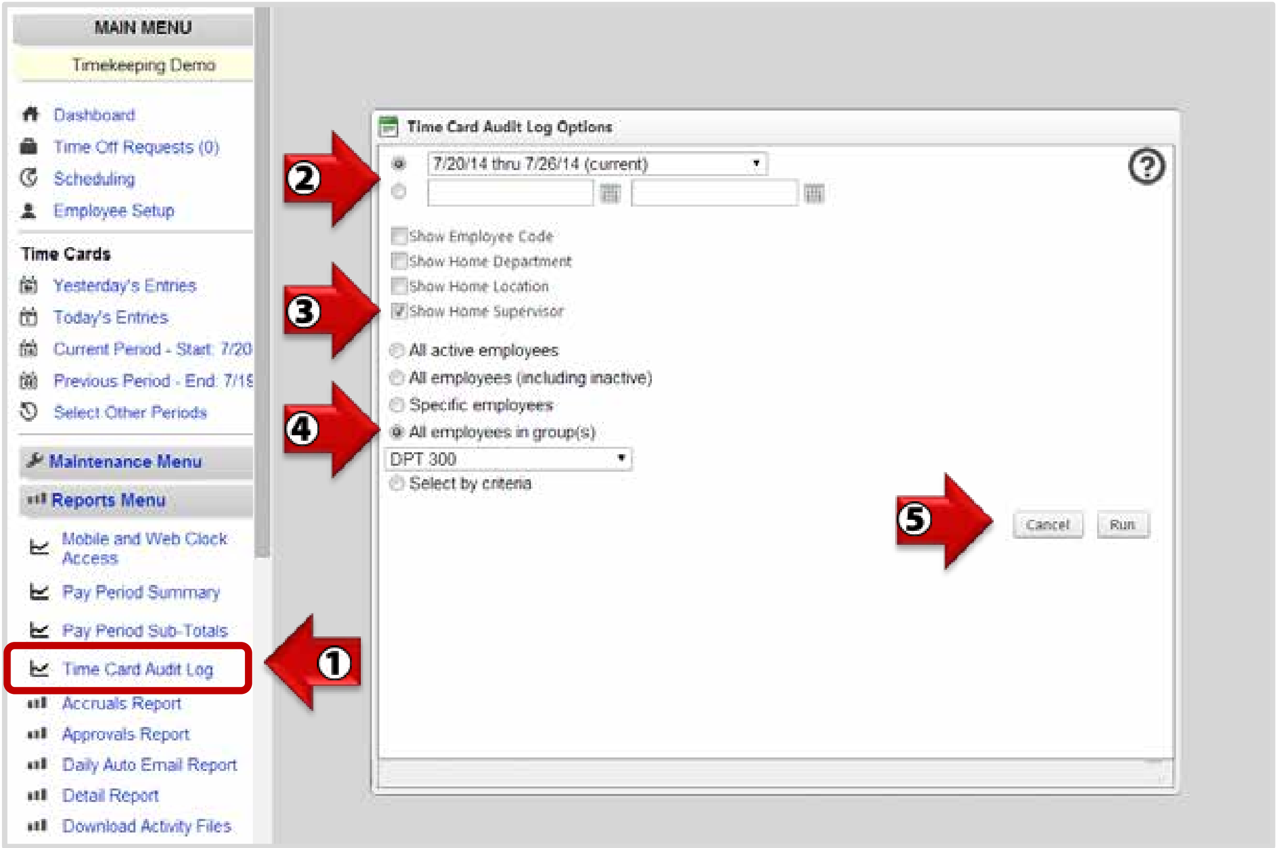
**Step 1**. To run the “Time Card Audit Log” report, select the “Reports Menu” and click on the “Time Card Audit Log” report link. (See illustration 1.1).

**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

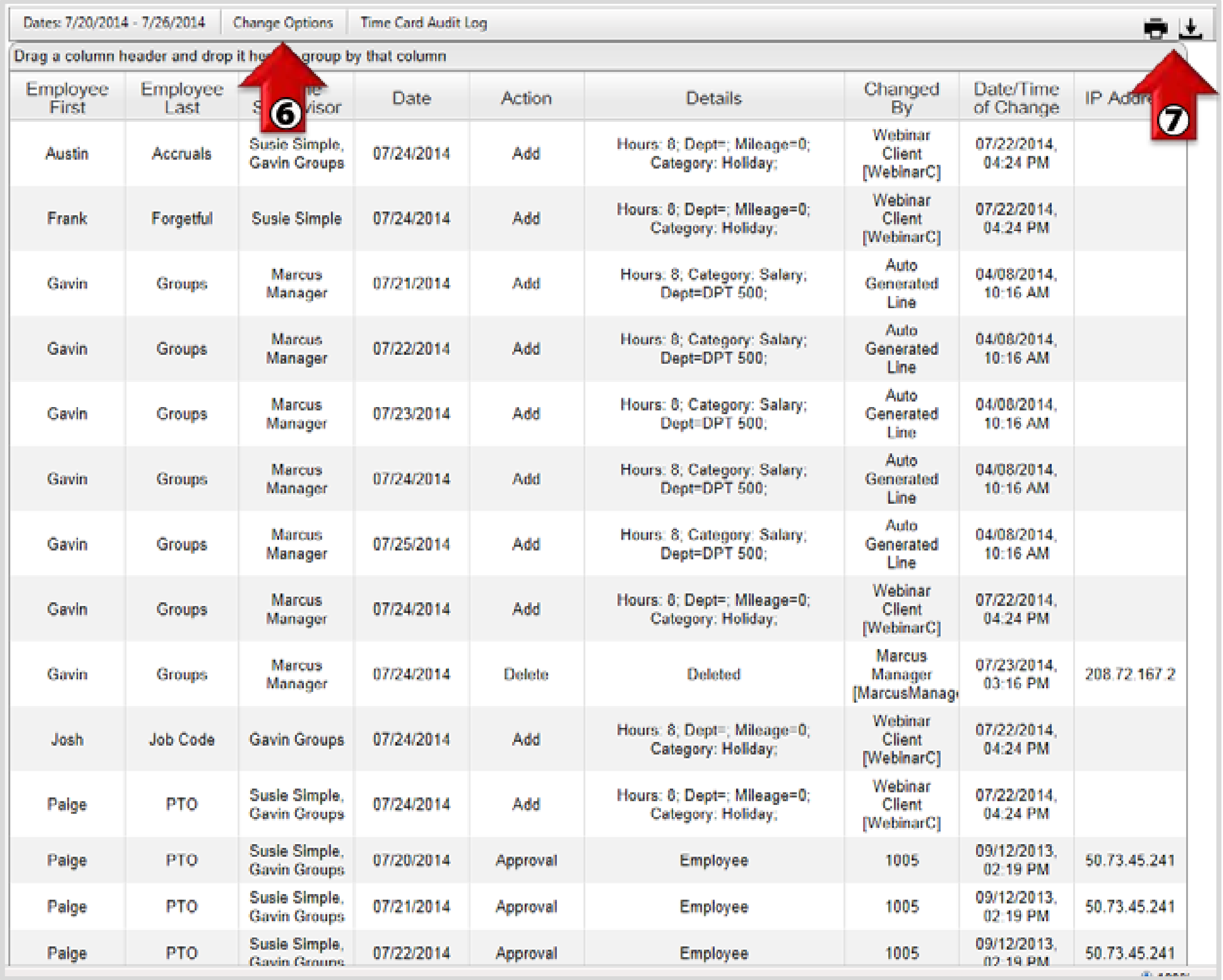
## Time Card Audit Log Report- Continued

**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.

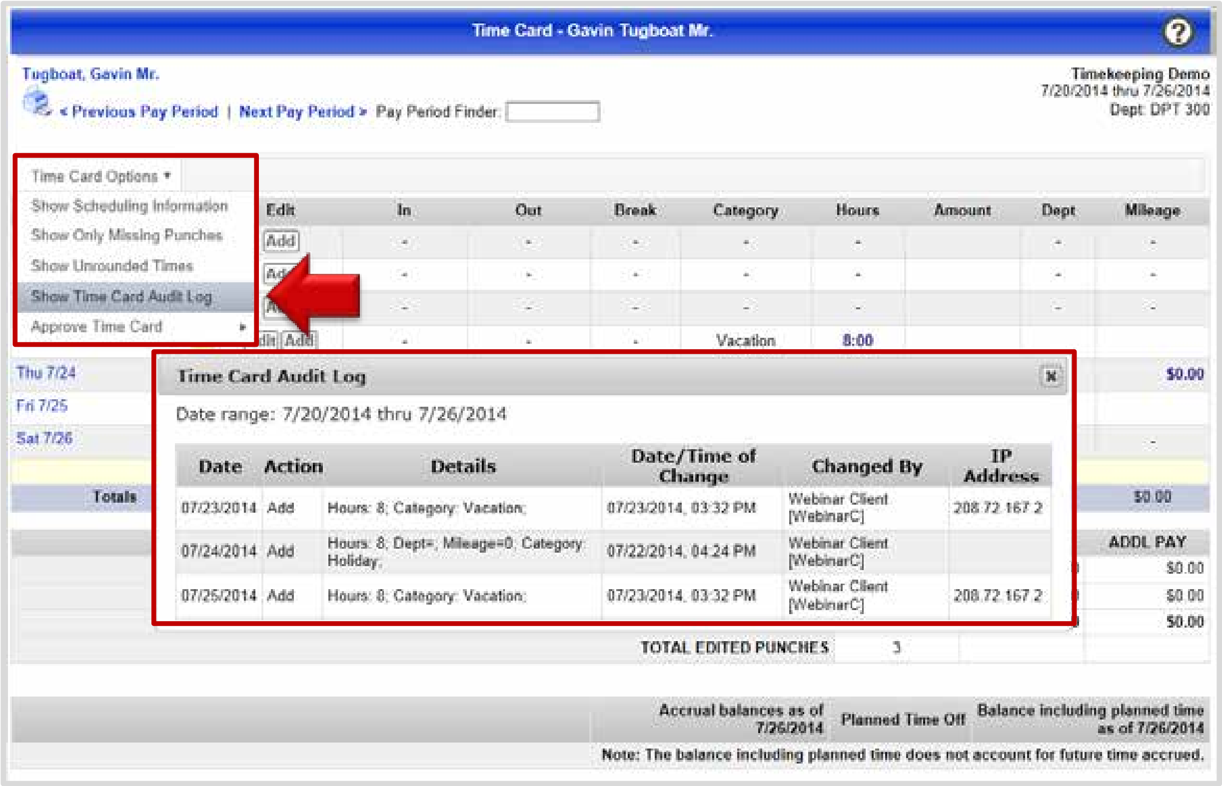



| Employee First | Employee Last | Supervisor | Date | Action | Details | Changed By | Date/Time of Change | IP Addr |
|---|---|---|---|---|---|---|---|---|
| Austin | Accruals | Susie Simple, Gavin Groups | 07/24/2014 | Add | Hours: 8; Dept=; Mileage=0; Category: Holiday; | Webinar Client [WebinarC] | 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)*

## 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).




*(Illustration 1.3)*

## 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.

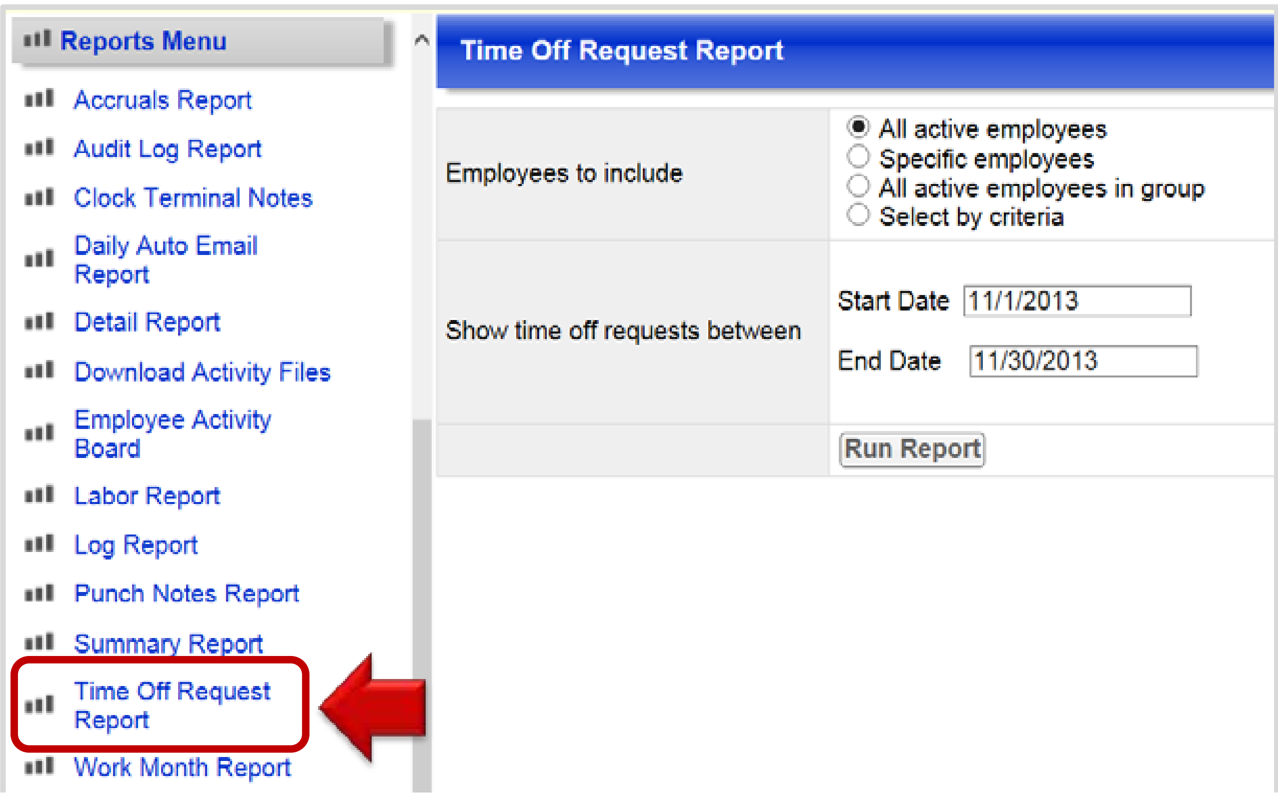
**Step 1.** To run the “Time off Request Report,” select “Reports Menu” from the left pane.

**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.”




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


Time Off Request Report

< Printer Friendly

| 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<br>Request Time Off Approved - Supervisor Comments: ApprovedApproved 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 |

## 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).

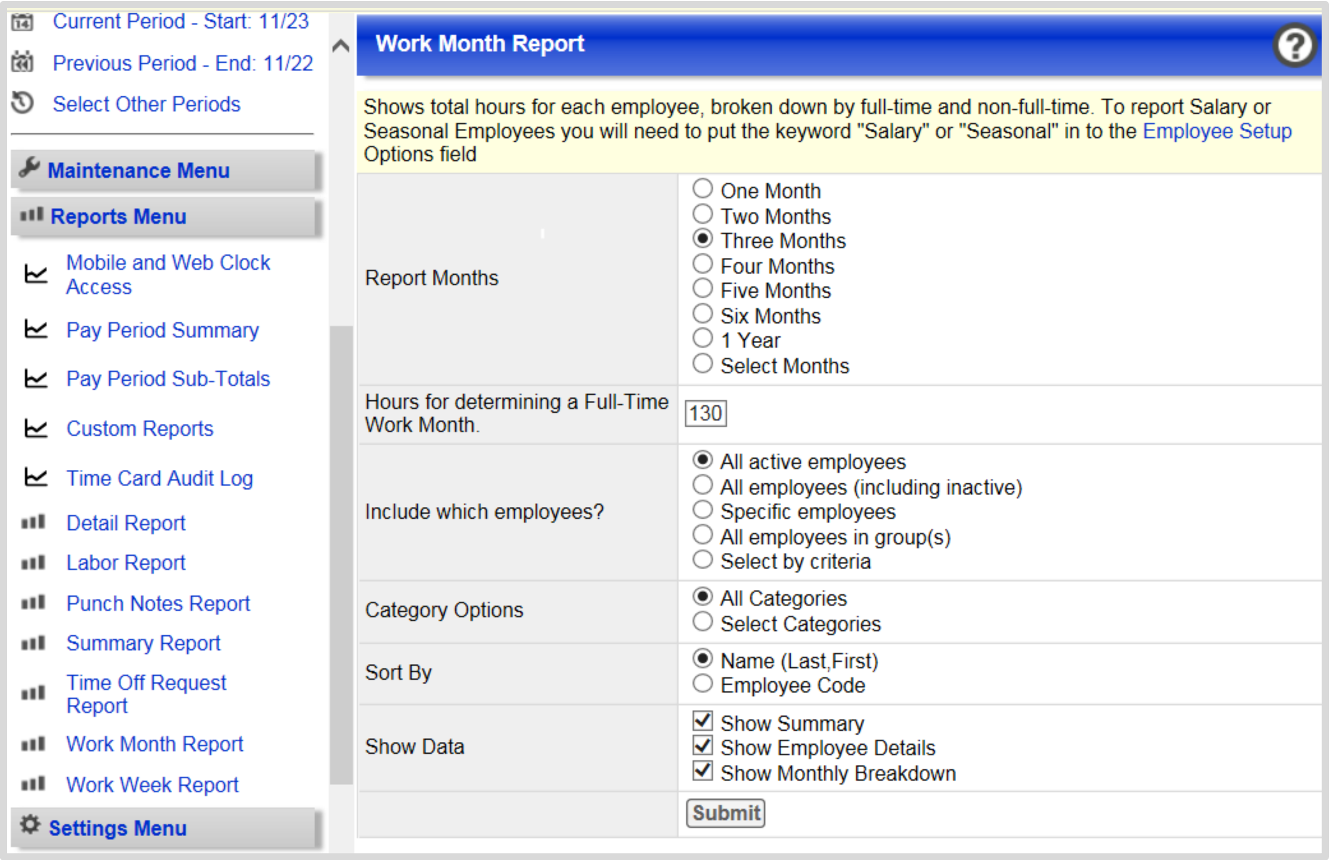
**Step 6.** Determine which employees to include, for example, employees in a specific group.

**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.”



## 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.

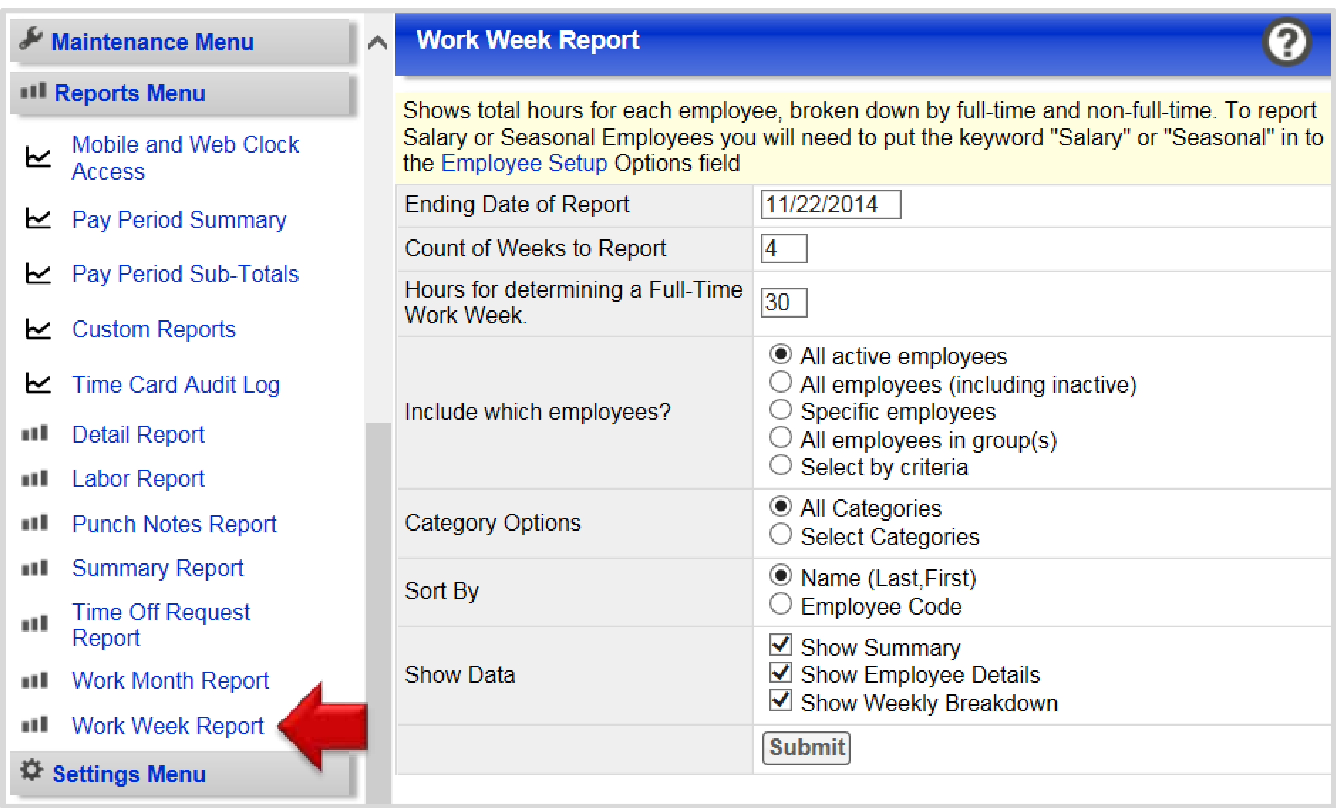
**Step 5.** Enter the number of hours that are considered as a full-time work week.

**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 Continued

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

**Work Week Report**

Timekeeping Demo
11/4/2014 thru 11/24/2014

Print Summary | Print Employees | 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.

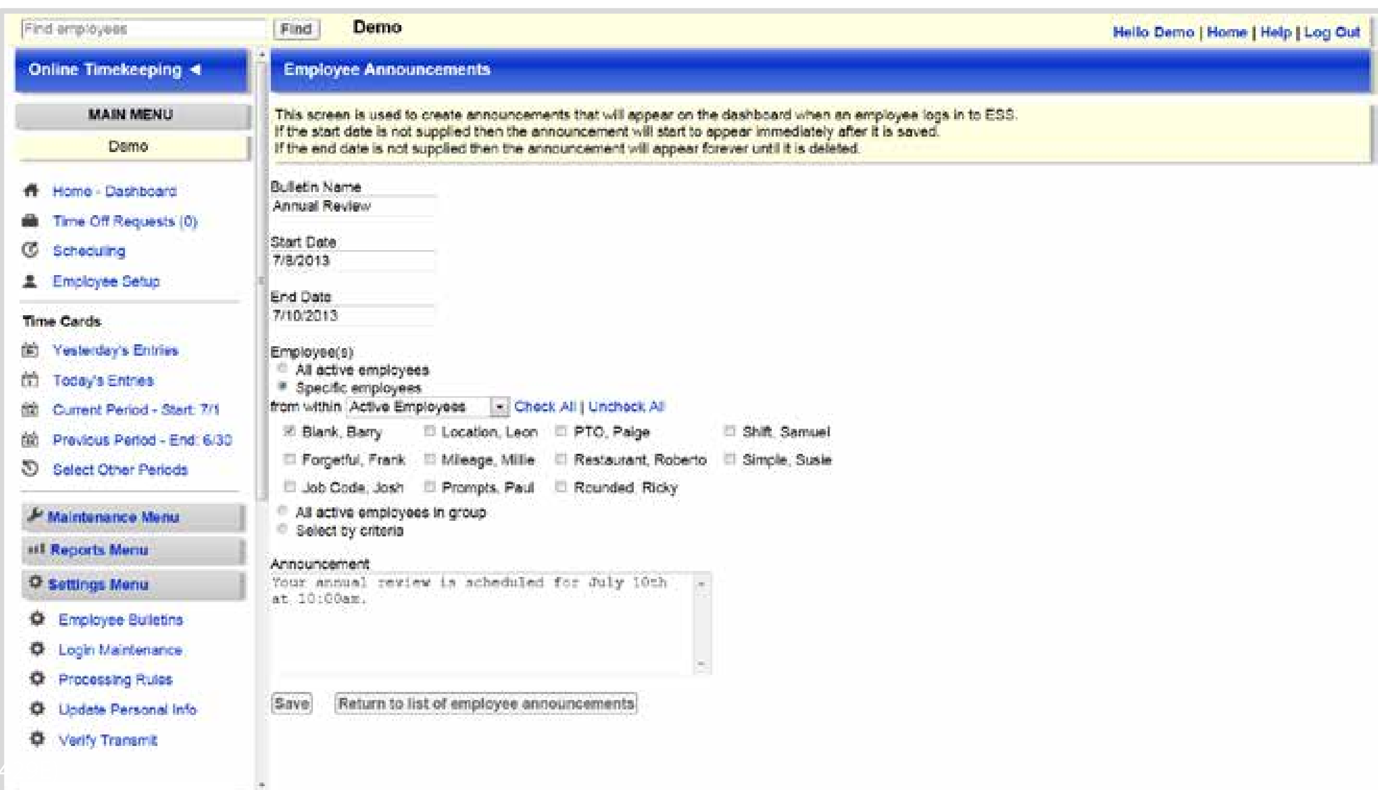
Note: If no end date is selected, the announcement will stay active until it is deleted or an end date has been added.

**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.

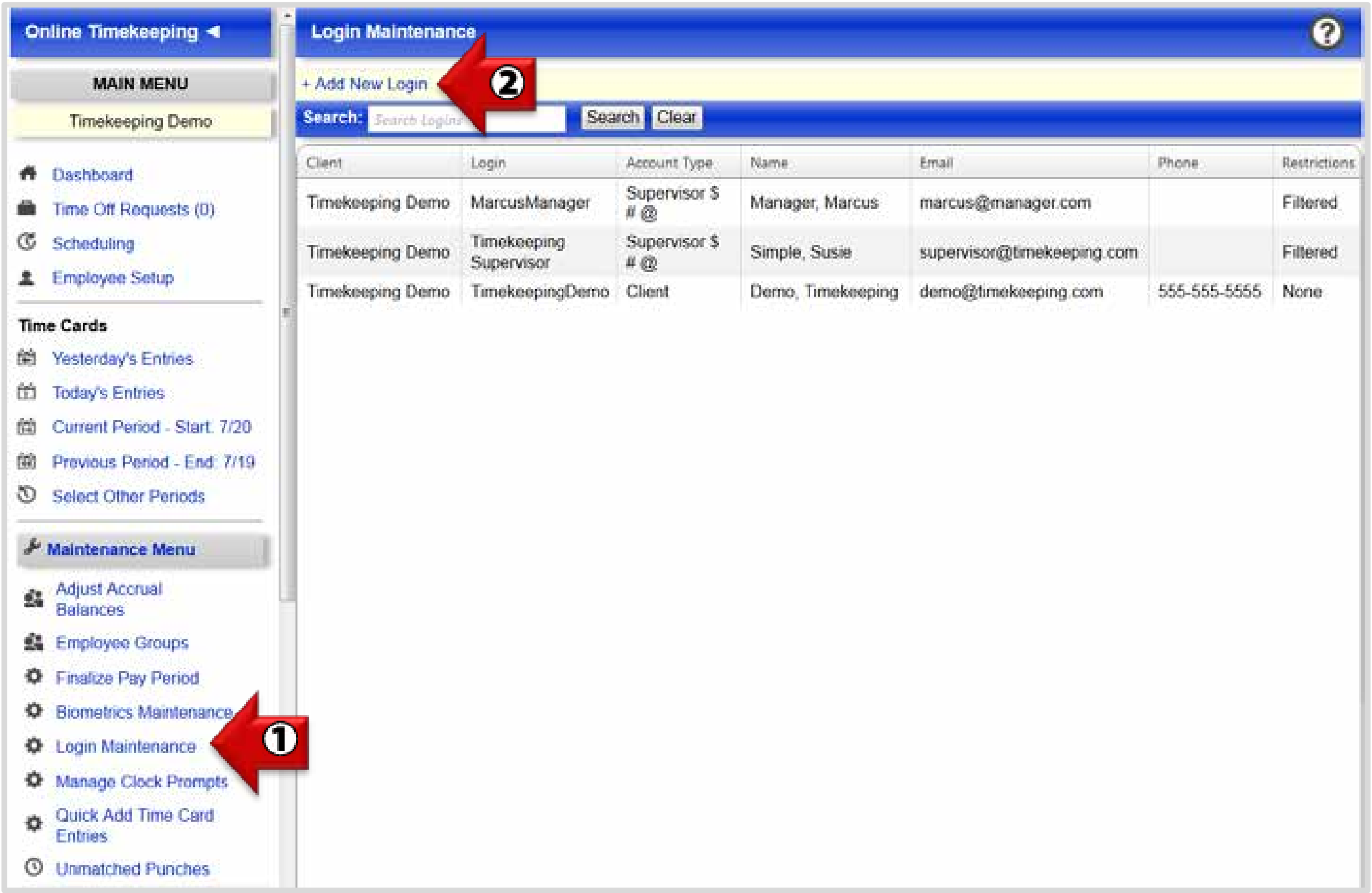


## Add a Supervisor Login

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.

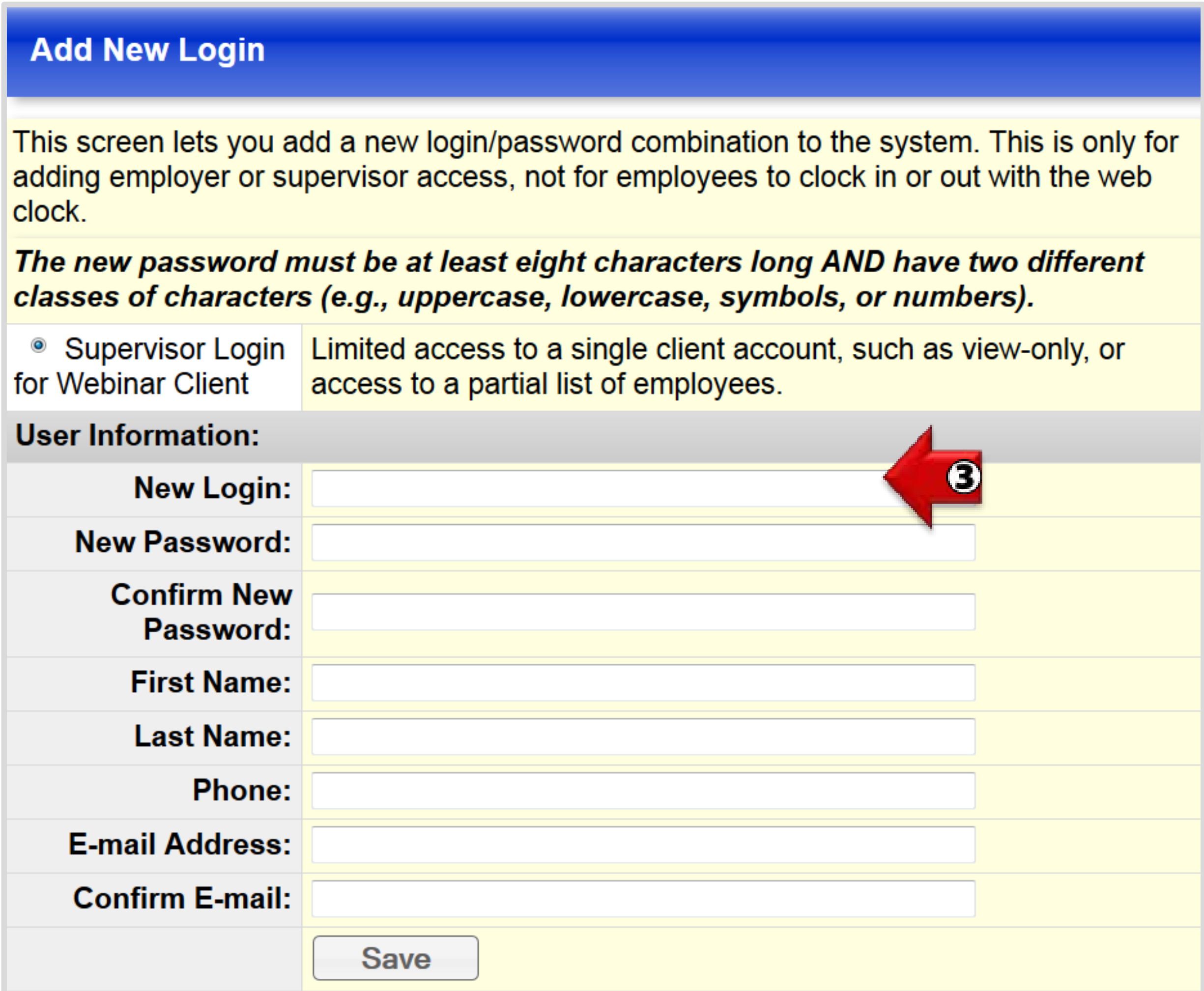
**Step 2.** Click the "Add New Login" link which is found at the top of the page. (See illustration 1.1).



*(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).

## 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.

***The new password must be at least eight characters long AND have two different classes of characters (e.g., uppercase, lowercase, symbols, or numbers).***

| | |
|---|---|
| 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:** | |
| **New Password:** | |
| **Confirm New Password:** | |
| **First Name:** | |
| **Last Name:** | |
| **Phone:** | |
| **E-mail Address:** | |
| **Confirm E-mail:** | |
| | Save |

3

*(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.”

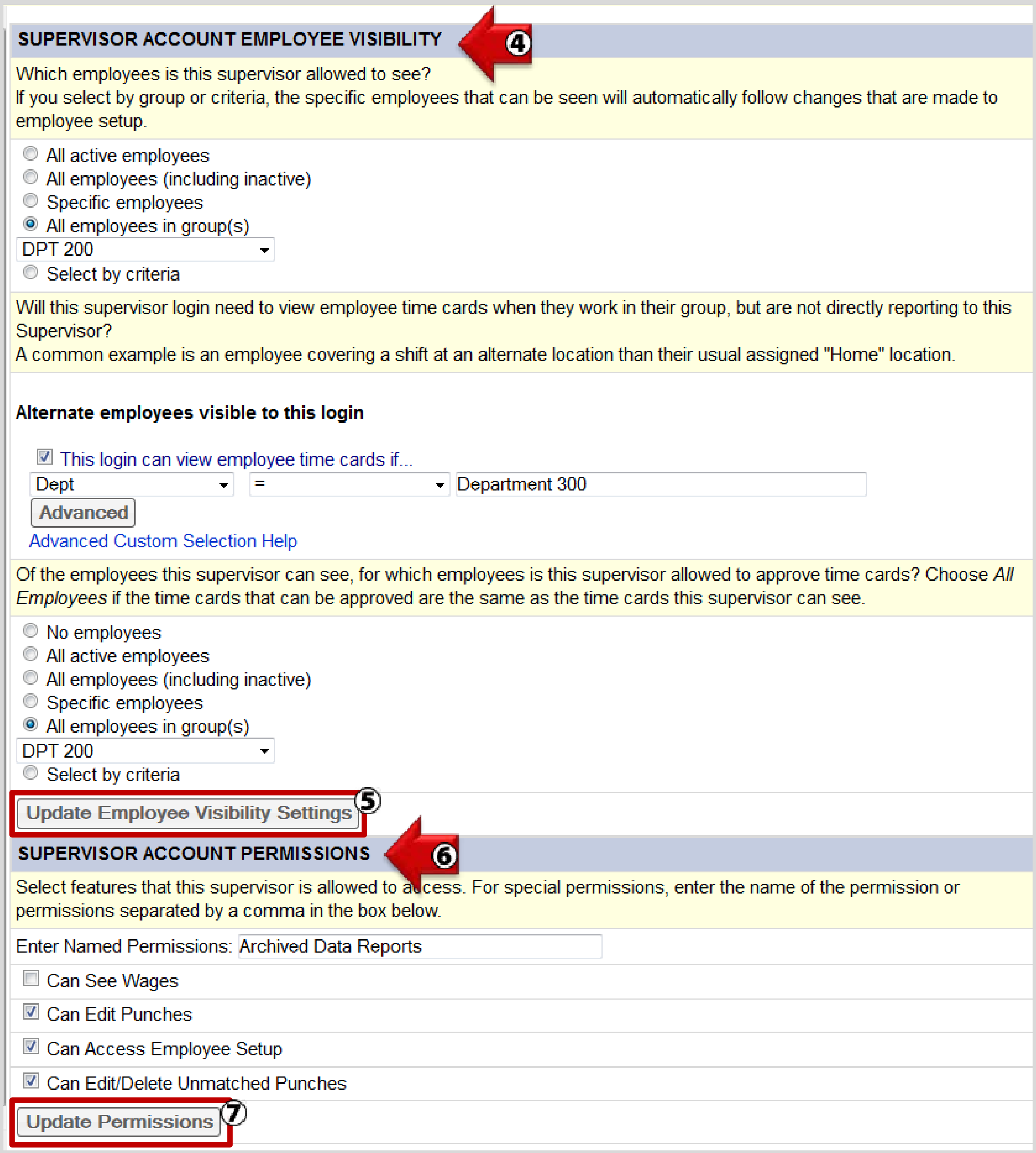
**Step 6.** Next, determine which permissions the supervisor will have access to from the list of options in the “Supervisor Account Permissions.”

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




*(Illustration 1.3)*

## 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.


| 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 |

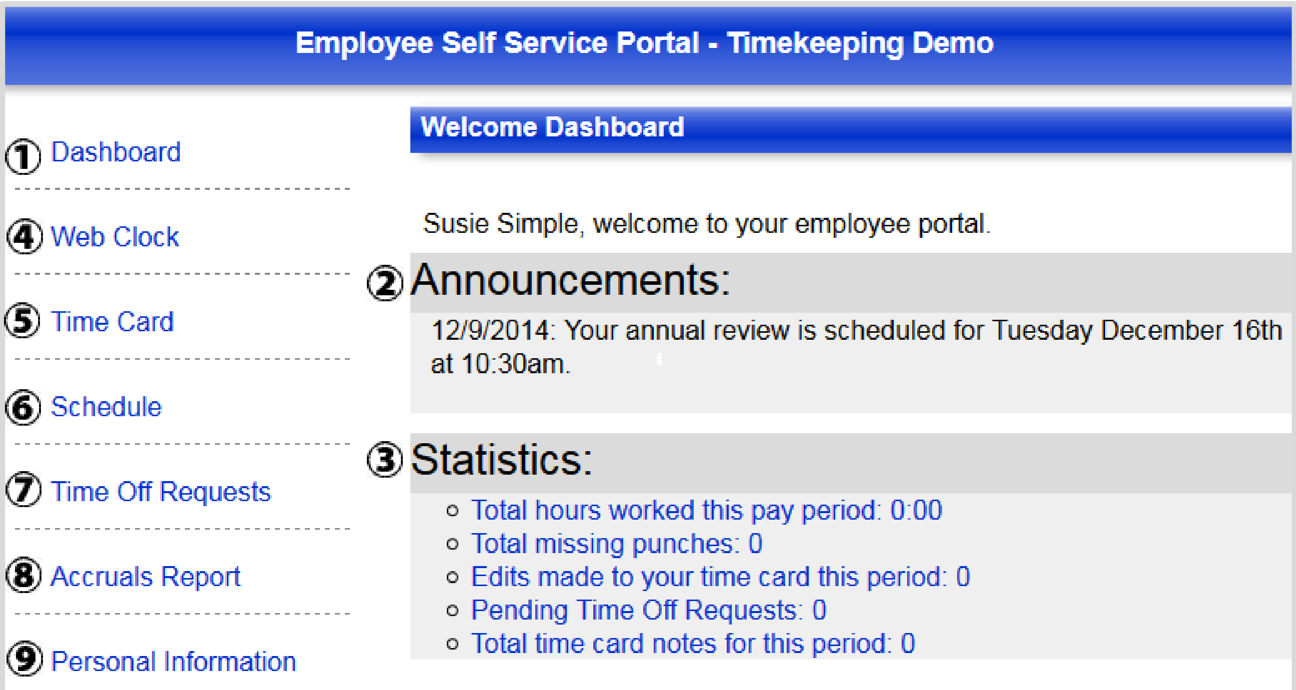
## Employee Self-Service Portal

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.

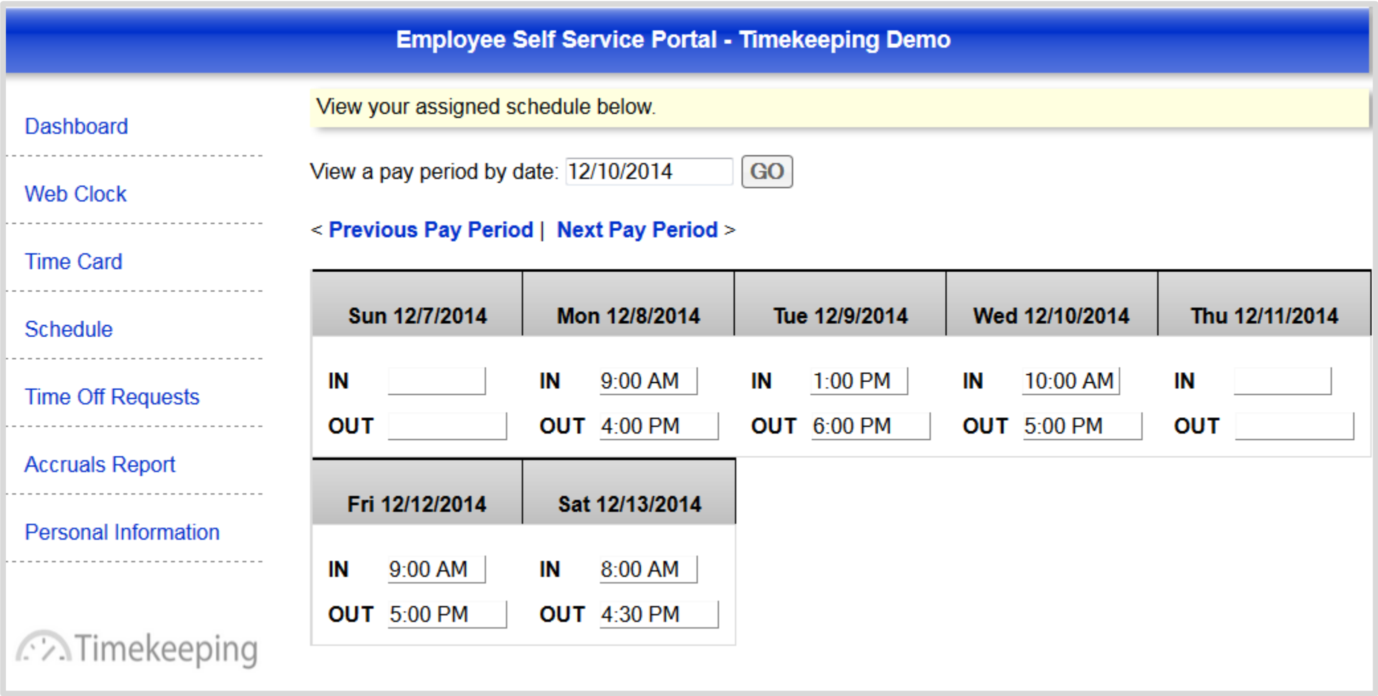
1. The “Welcome Dashboard” serves two purposes. “Announcements” for the employee, and a quick view for the current pay period “Statistics.”
2. The “Announcements” are messages from a supervisor or management informing you of upcoming events, meetings, etc.
3. “Statistics” gives you a quick view of the 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.



# 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.

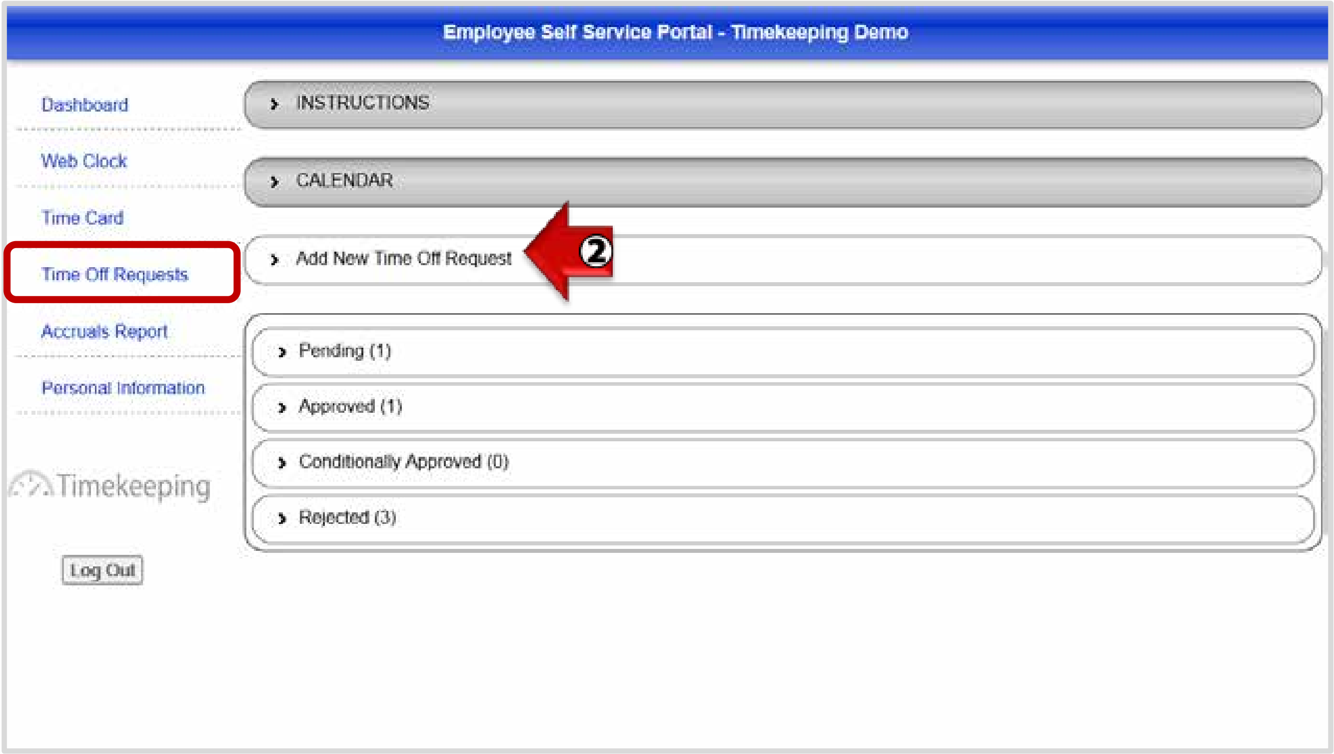


## Time-Off Request Employee Steps

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.

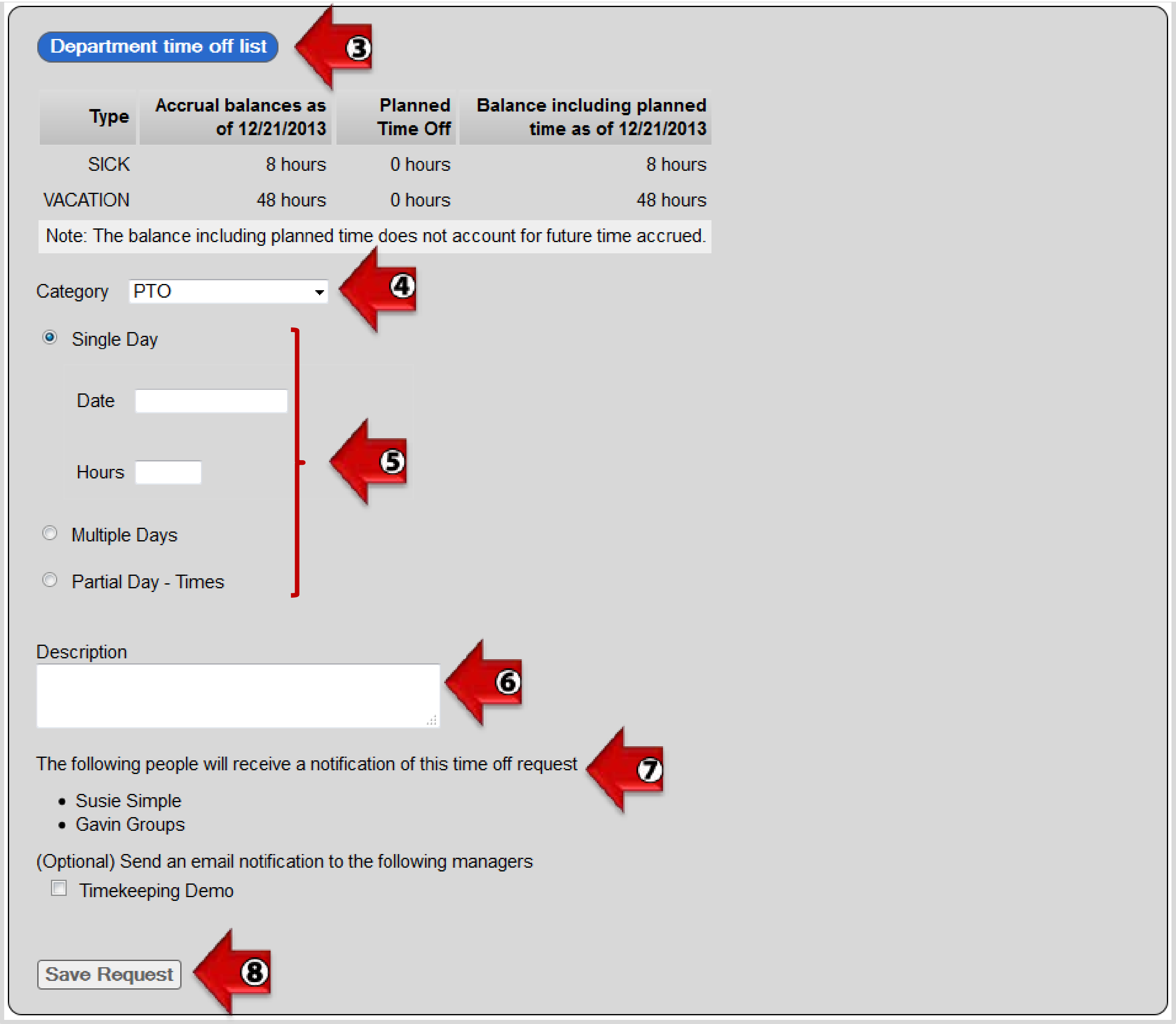
**Step 5.** Select single day, multiple days or a partial day.

**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.

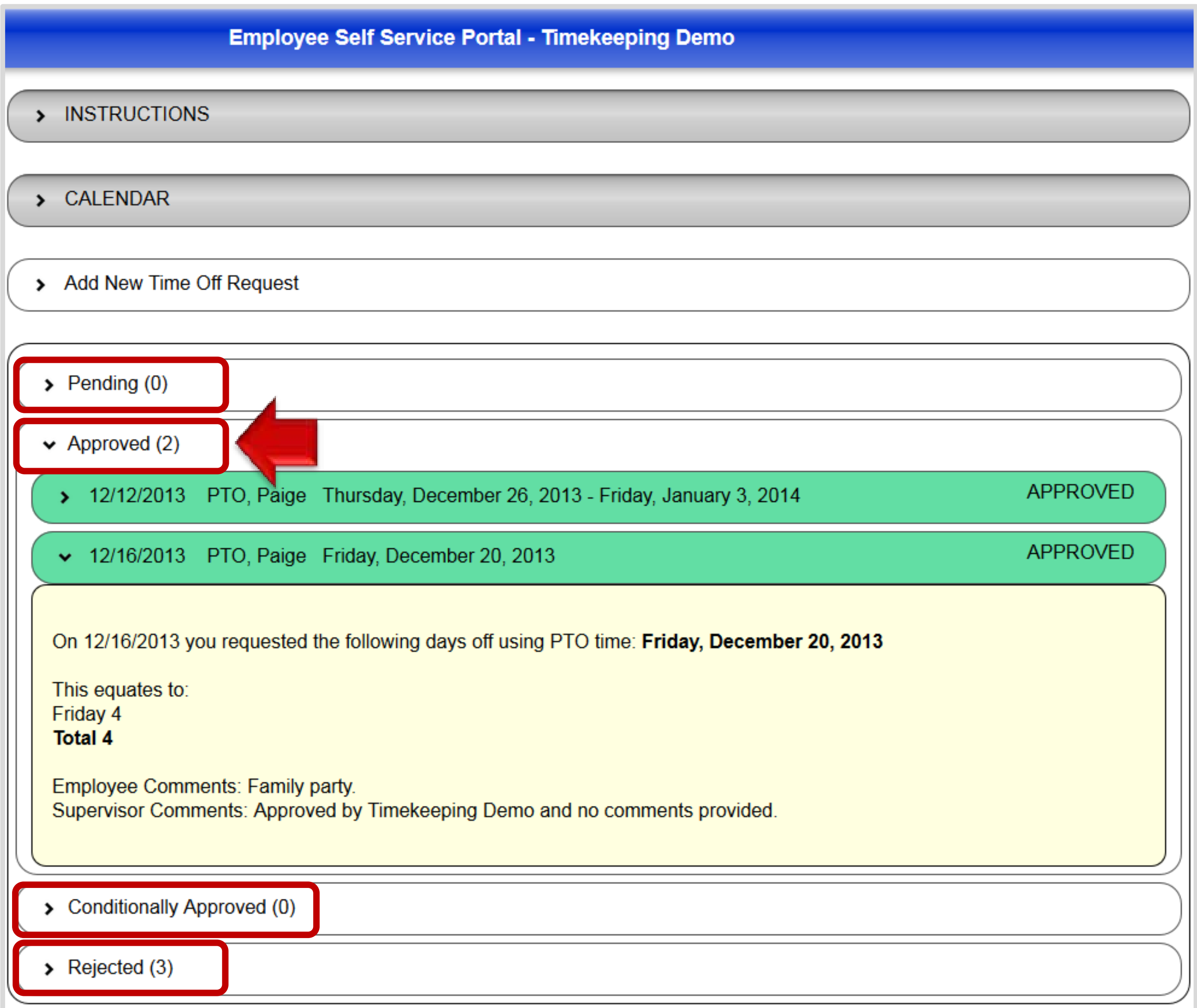
## Time-Off Request Employee Steps - Continued



## 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.

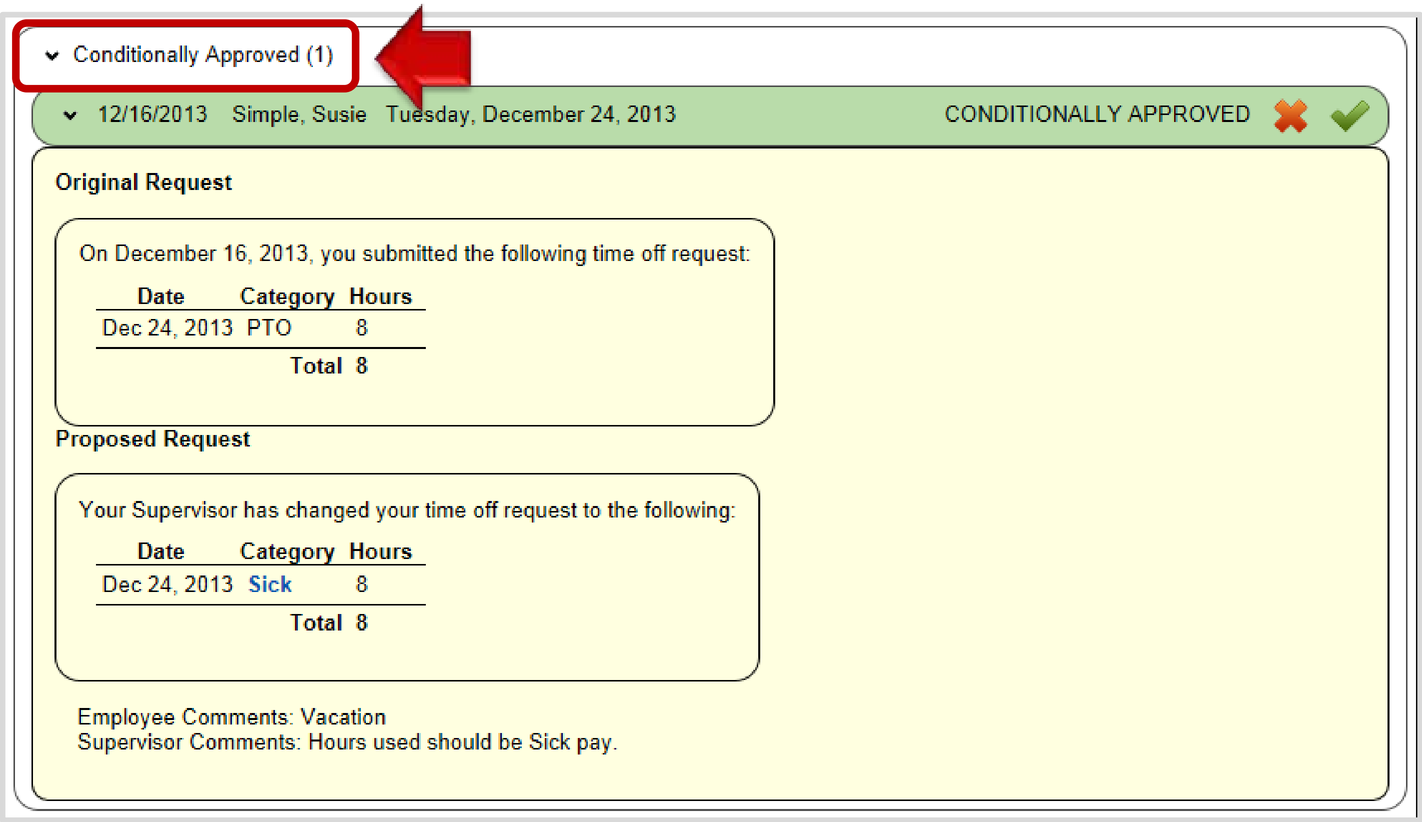
Details of a request can be viewed from the “Pending,” “Approved,” “Conditionally Approved,” and “Rejected” sections. For example click on “Approved” to see the list of “Approved” requests (as seen below). Click the (>) on a specific “Approved” request to view details.



## 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.



## TimeWorks Mobile For the Employee

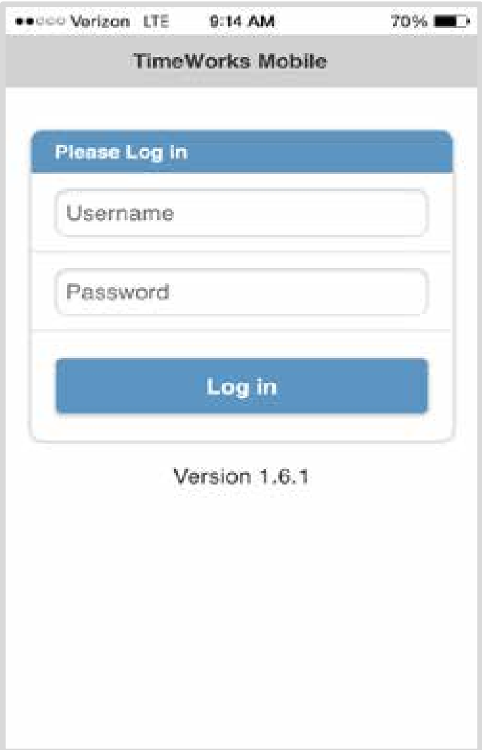
The TimeWorks Mobile app allows employees to track their hour's on-the-go, punch IN\OUT, view available time off hours, and more. The mobile app is available on either the iTunes™ App Store (IOS devices) or GooglePlayT™ App Store (Android devices). The app can be downloaded for free.

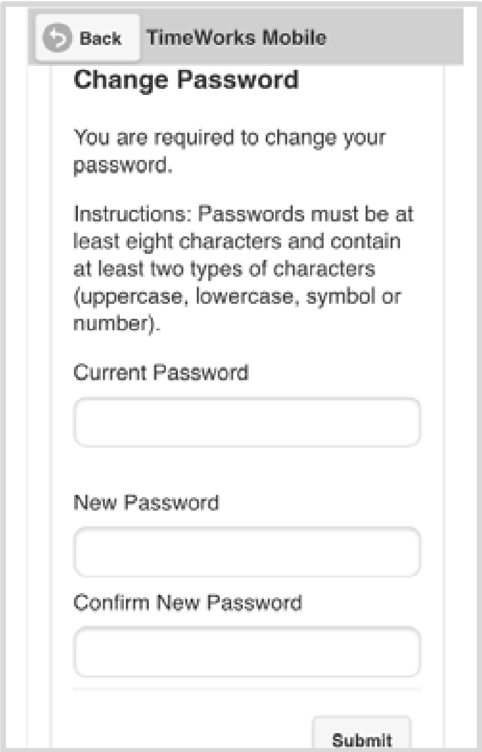
Follow the steps below to access and use the mobile app.

**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.



# TimeWorks Mobile for the Employee Continued

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

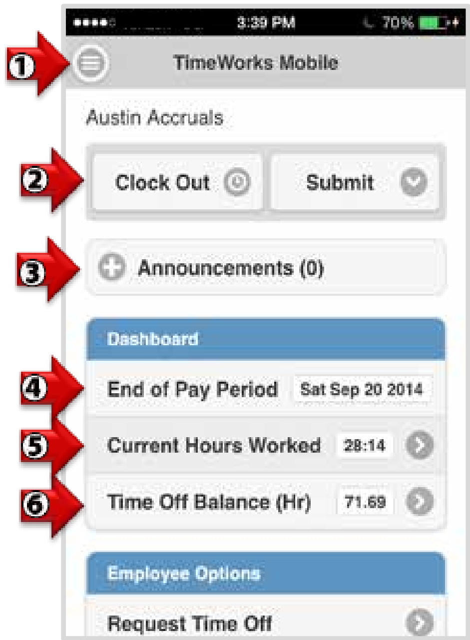



*Figure 1.3 TimeWorks Mobile Main Menu*

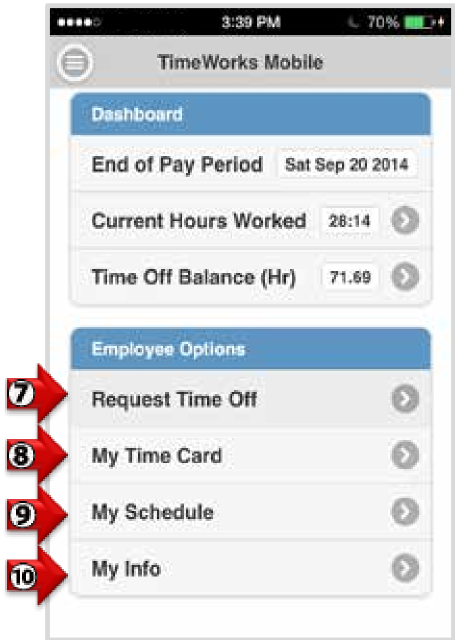



*Figure 1.4 TimeWorks Mobile Main Menu*

**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 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.

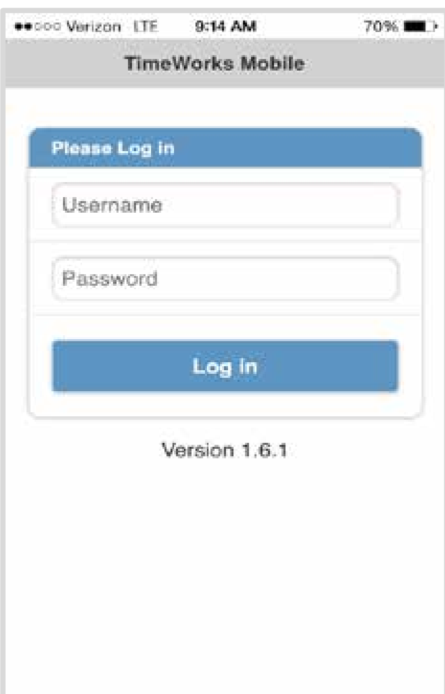



*Figure 1.1 TimeWorks Mobile Log in*

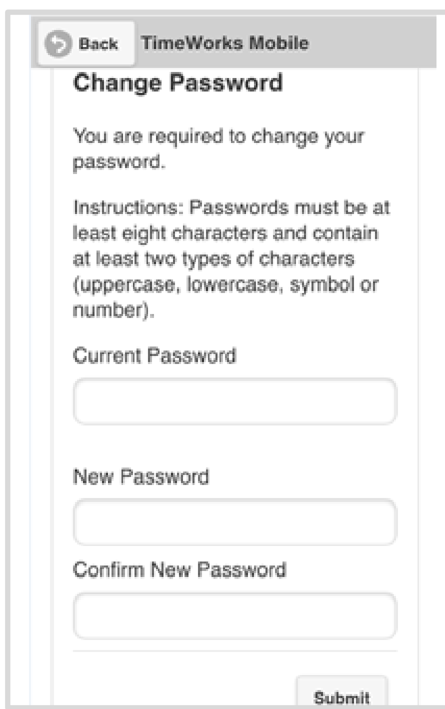


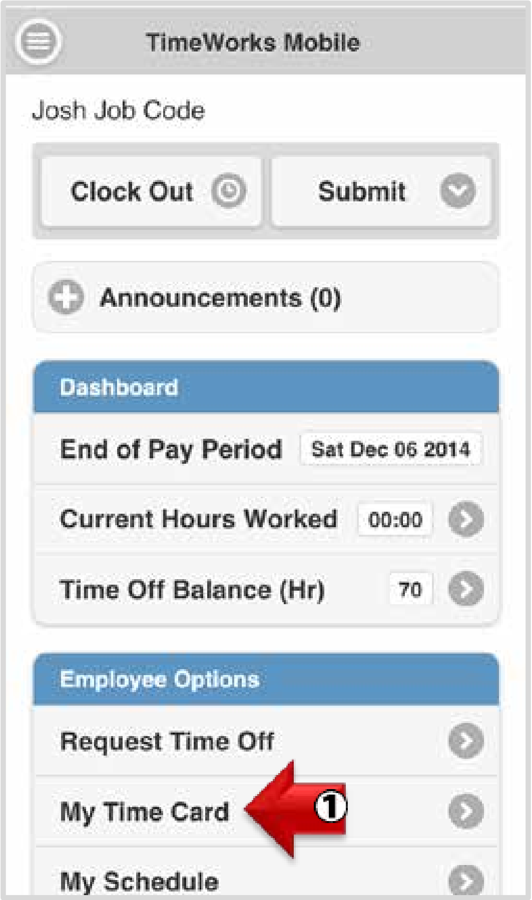

*Figure 1.2 TimeWorks Mobile Password*

## 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.”



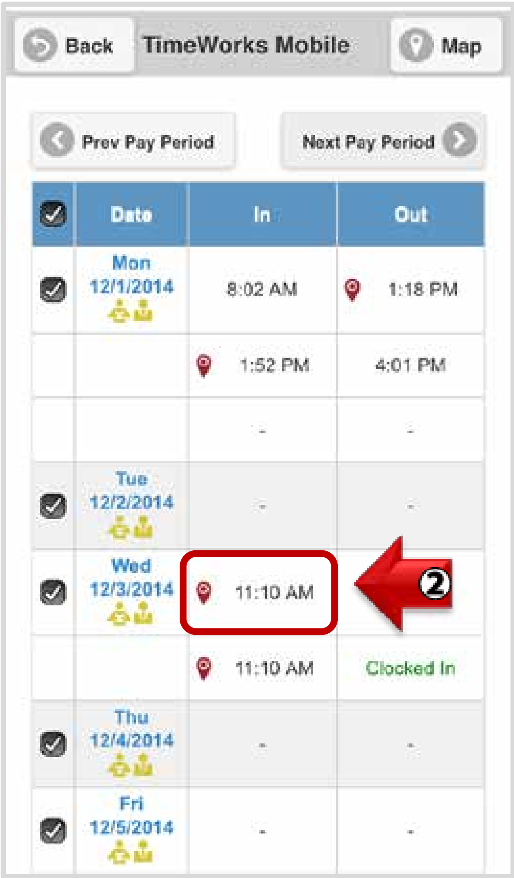

Pinpoint GPS only applies to punches made with the TimeWorks Mobile app. On the time card the red pin icon (looks like an upside down rain drop) indicates the time punch was made from a mobile device.

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.

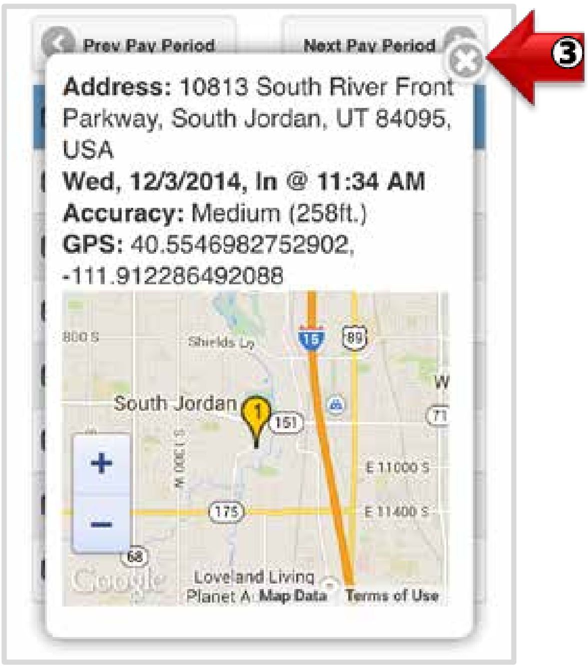
**Step 2**. Tap on the time punch to view the Pinpoint GPS coordinates.

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

## Pinpoint GPS for the Employee Continued




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 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.

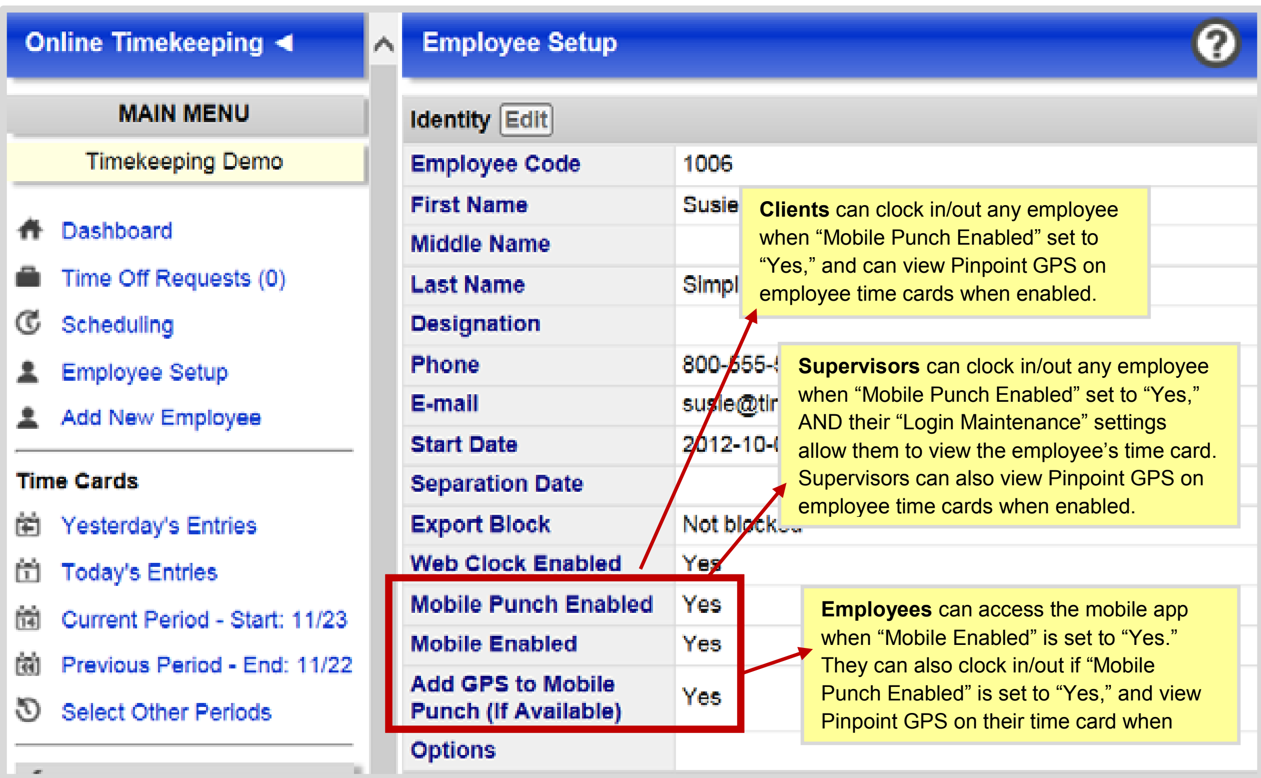
Before using the mobile app, you will need to contact your timekeeping provider to have any or all of the following options enabled:

*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.

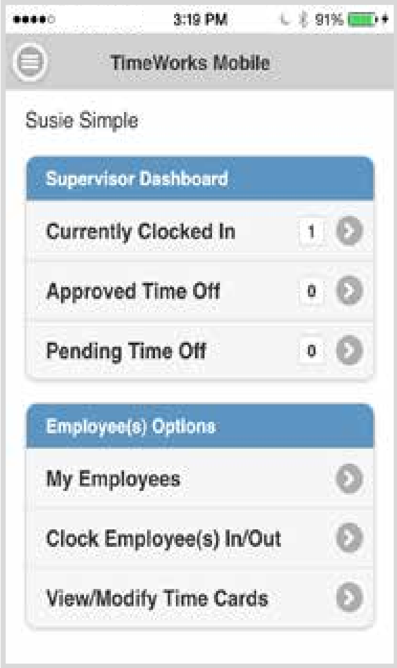


*(Illustration 1.1)*

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 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.

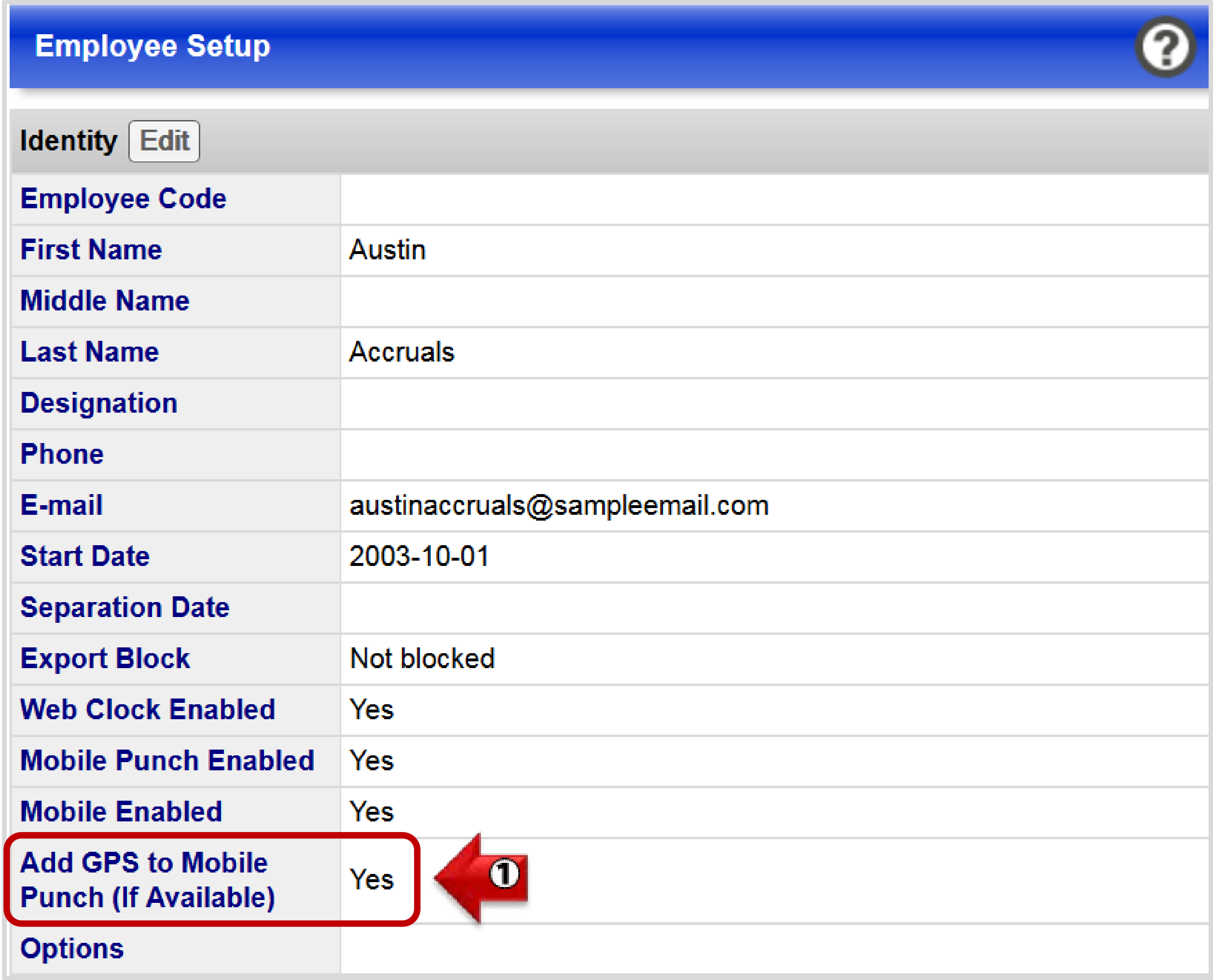
# Pinpoint GPS View for the Client and Supervisor

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

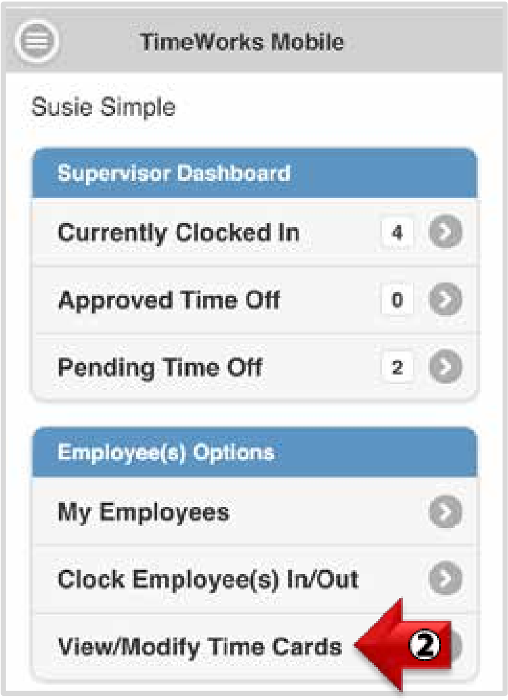
Identity Edit

| | |
|---|---|
| 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 | |

1

# 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.

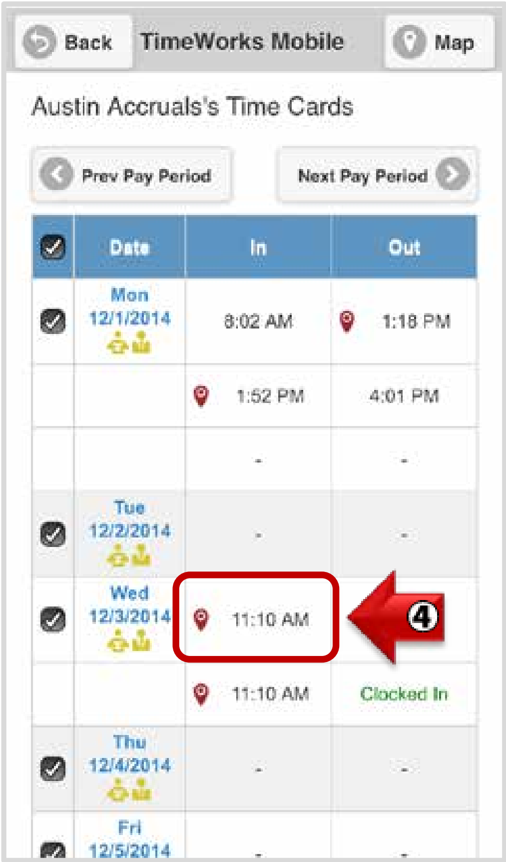
## Pinpoint GPS View for the Client and Supervisor Continued

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.

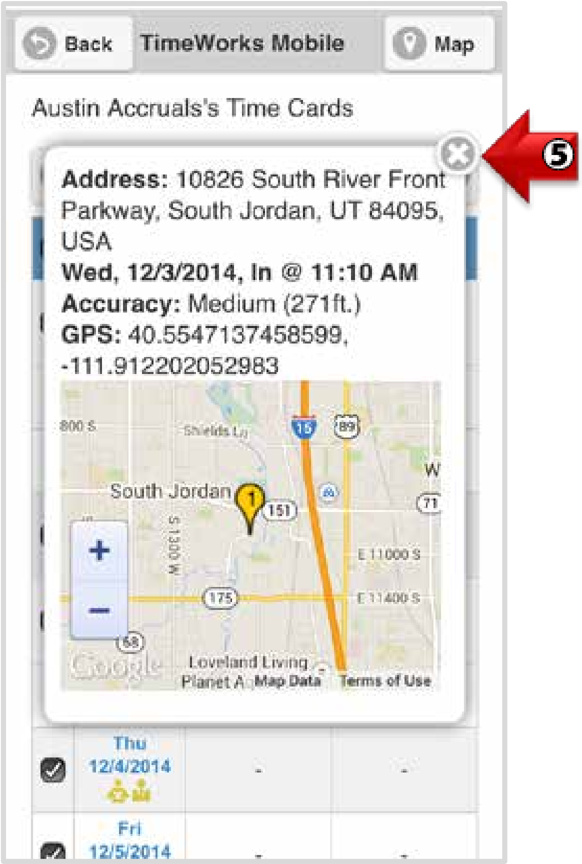
The map displays detailed information regarding the address, date, accuracy of location, and GPS coordinates. To view more of the map tap on the plus (+) or minus (-) buttons.



## 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 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.

## 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.

**<u>TO CLOCK IN:</u>**

**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.


**<u>TO CLOCK OUT:</u>**

**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.

## 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.

## 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.

## 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.

## 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.

## 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.

## 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.

## 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.

## 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.

## 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.

## 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.

## 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.

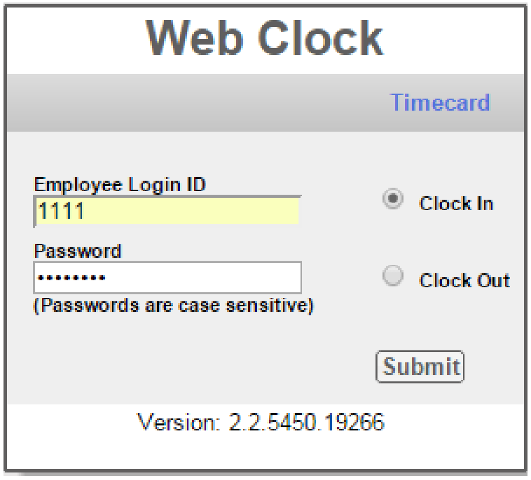
**TO CLOCK IN**:

**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.

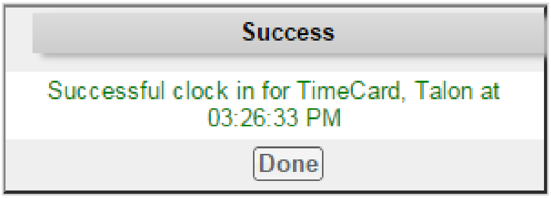
**Step 3.** Click the radio button for “Clock In.”

**Step 4.** Click the “Submit” button.




*(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.




*(Illustration 1.2)*

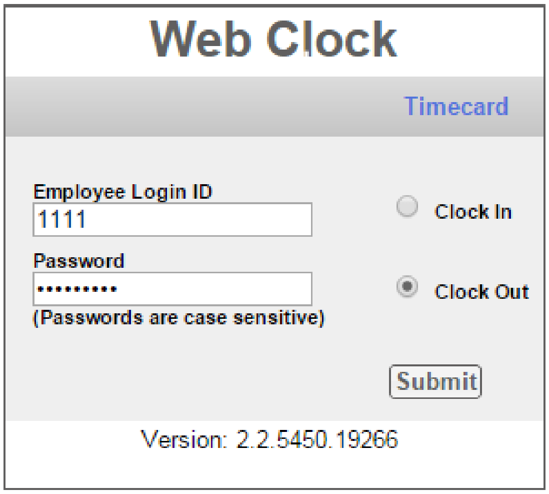
## How to Clock Out on a WebClock

**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.

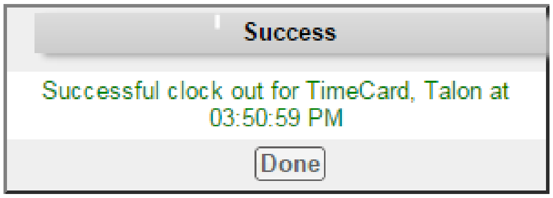
**Step 3.** Click the radio button for “Clock Out.”

**Step 4.** Click the “Submit” button.




*(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

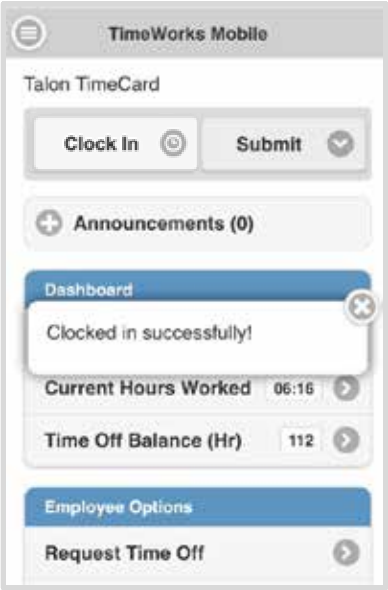
Before you are able to clock In/Out on TimeWorks Mobile you will need to obtain a Login ID and Password from your supervisor, manager, or employer. When TimeWorks Mobile records a time (sometimes referred to as a 'punch') for an employee, it will need to know if the employee is clocking in or clocking 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).



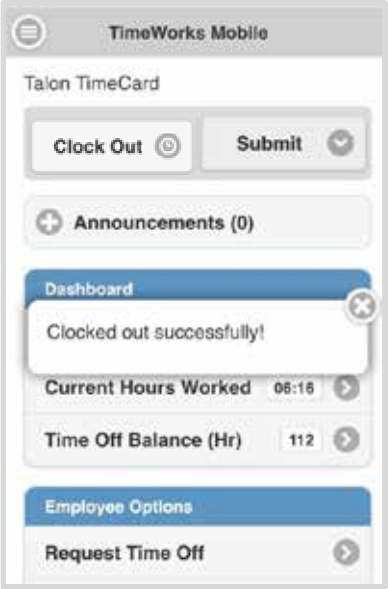

*(Illustration 1.1)*

**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)*

# Notes

# Notes