TIMEIPS DIGITAL TIME CLOCK & ATTENDANCE SYSTEMS 316-264-1600

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TimeIPS What's New - Version 2.0

TimeIPS is continually developed and improved with new features and enhancements. Below is an overview of the newest features and enhancements available with TimeIPS Version 2.0.

TIP: The features and enhancements included in the most recent release of TimeIPS may be indicated with the NEW icon.
NOTE: Features that may require an additional module or hardware device may be indicated with the icon.

*Minor version updates to the major version of TimeIPS you are currently running (i.e. version 2.0) are always available. Simply make sure that **Automatic Updates** checkbox is checked and you will receive regular automatic minor version updates. In some cases, the latest minor version releases are rolled-out in phases. If you'd like to get a minor version update before your roll-out phase, please contact TimeIPS technical support.*

New Features in TimeIPS version 2.0 NEW

- Updated base system components for improved perfomance, compatibilty and expanability
- Support for Spanish language in Telephone Clocking
- Enhanced control over day boundaries in the Sign Off Report
- Option to hide columns from Custom Reporting
- IPSPAPI module allows for programmatic generation of payroll information such as custom reports.
- Additional fields and reports for Work Orders
- Improved controls over the applications of Shift Differentials
- Retroactive Job Reassignments allow employees to specify their job for the day after clocking in.
- Accruals can utilize custom expressions to calculate accrued value
- New schedule option to prevent employees from clocking in late
- Custom Report feature for built in formatting of XML documents.
- Work Order Segments allow for more better control over Work Orders

Improvements in TimeIPS version 2.0

Version 2.0.0-2.0.39

- Spanish language Telephone Clocking
- Spanish language text at walk-up clocking
- Enhanced control over day boundaries in the Sign Off Report
- IPSPAPI module allows for programmatic generation of payroll information such as custom reports.
- Additional fields and reports for Work Orders
- Improved control over Shift Differentials
- Retroactive job reassignments
- Division default starting Benefit Request time
- Expressions in accruals
- Option in employee schedules to deny late clock ins
- Enhanced auditing on Advanced Schedule clock-in/clock-out operations
- New feature in Holidays allows for additional control on counting holiday hours as hours worked for overtime calculations.
- Option in Custom Reporting to generate a report as well formed XML.
- Work Order Segments added to Work Orders
- Additional fields availabl in Shifts for tracking codes or other data
- Automatic clocking rules apply retroactively to any time earlier in the current day

See Also:
TimeIPS What's New - Version 1.11
TimeIPS What's New - Version Comparison Table
1.11 to 2.0 Migration Guide
TimeIPS What's New - Version 2.1

1.11 to 2.0 Migration Guide

TimeIPS version 2.0.x offers many upgrades and improvements over version 1.11.x. To make the most of the new version, please review the following changes: Note: Some of the items listed require optional modules, which may or may not be listed in the description of the change.

- IMPORTANT: TimeIPS 2.0.x upgrades all core system components. Some older TimeIPS hardware servers will need a hardware upgrade to run this new version. If you are still running TimeIPS on a hardware server please check compatibility with your model and SN here.
- Managers may need to be aware of the following:
  1. When using benefits for employees, it is now possible to set the default time-of-day for the benefit to begin, even when the employee has no schedule.
  2. Improvements have been made to the tags in the system for visually impaired users.
  3. The Sign Off report includes new modes for showing the "days" on the report. One of the new options bases days on consecutive work which allows employees who work varied shifts and hours to always see their time grouped as expected, even when their work spans multiple actual andl/or work days.
  4. When using telephone clocking, Spanish language sounds are now available. When and how these are used can be configured under the telephone clocking administration area.
  5. Walk-up clocks can be set to show text in English or Spanish. This is configured on the General tab for each clock.
  6. Employee schedules can be configured to prevent them from clocking in late. In this case, when an employee arrives late, they'll need to go see a manager in person to explain their late arrival and get clocked in.
  7. New "Segments" have been added to Work Orders to track time worked vs. budgeted time. These can be configured for a single work order job, to track time vs. the budget for that job. They can also be configured for groups of jobs, including all jobs on a work order. Alerts can be configured for each segment, to allow managers to know the progress of work vs. budgeted time.
  8. If all time employees work should be tracked against a job and/or work order, a new retroactive job change mode is available. When enabled, the first change job done by an employee clocked in without a job is special. Instead of processing a job change, the original clock in is updated to the job specified.
- In addition, Administrators need to be aware of the following:
  1. IAPI and SAPI customers making JSON requests should note that the returned Content-type is now "application/json" instead of "text/javascript"
  2. Complex accrual rules can now be handled automatically using expression logic in the accrual rules configuration.
  3. Accruals can be configured to run modifications before or after accruals, and a number of special cases, such as when accruals and modifications run at the same time, are handled better. This could cause changes in accrual calculation results, when compared to 1.x system. After upgrade, be sure to review accrual calculations for expected results.
  4. When employees work part of a shift, it may be desirable to still apply the shift differential to the employee. To accommodate this, there are new options to configure the amount of time that qualifies, and the evaluation of multiple segments of time that are used to figure the qualification.
  5. In some situations (employees with identical names, badges, SSN, etc.) it can be helpful to have an internally generated unique identifier for each employee on import and export. This is now provided.
  6. Custom reports and payroll can export files in several formats, including a new XML mode, useful for integration with external systems.
  7. A new payroll API module (IPSPAPI) allows external systems to run custom reports with up-to-date payroll calculations, including shift differentials, overtime, etc.
  8. It is now possible to configure holidays that are not paid, but still reduce the weekly 40 hours-for-overtime requirement.
  9. Work orders have been upgraded with several additional fields to hold details that maybe helpful to employees working on them. A new job routing report is available for work orders that can display large amounts of detail associated with each work order job.
  10. Overtime policies can now set a different number of hours for weekly overtime/doubletime based on the day of the week. For example, overtime can start after a standard 40 hours on Saturday, but could start after only 32 hours on Sunday.
  11. Shifts can be configured with Scheduled Shift Hours. These are the expected number of hours per shift. If employees exceed this time per day, and their overtime policy is configured to use shift hours for overtime per day, then employees will go into overtime when these hours are exceeded. This greatly simplifies overtime configuration when the daily hours before overtime varies by shift and employees frequently changes shifts.
  12. Shifts have new fields for pay code, shift code, status, note and description. These are not required, but can be used to enhance the description and export detail related to shifts.

Internal Information (visible to Administrators only):

Last updated to cover changes up to 2.0.34

2.0 Hardware Compatibility

TimeIPS version 2.0.x updates all core system components and therefore is not compatible will all older hardware servers. Some systems that are not compatible as a Server can still be used as a Clock. However, with 2.0.x, a system acting as a Server CANNOT also be a Clock station.

TimeIPS System Model	Can be 2.0.x Server (Master)	Can be Clock for 2.0.x
IPS120T/IPS125T	No	Yes
IPS200T/IPS210T/IPS220T	No	Yes
IPS142T/IPS143T/IPS151T	Probably not. Some will work. Check your SN.	Yes, if not a Server.
IPS150T	Probably not. Some will work. Check your SN.	Yes, if not a Server.
IPS242T/IPS243T	No	Yes
IPS250T/IPS251T	No	Yes
IPS111T/IPS112T	Probably not. Some will work. Check your SN.	Yes, if not a Server.
IIPS230T	Maybe. Check your SN.	Yes, if not a Server.
IPS260T	Yes	Yes, if not a Server.
IPS265T	Yes	Yes, if not a Server.
IPS150B	Yes	Yes, if not a Server.
IPS150A/IPS150T	Maybe. Check your SN.	Yes, if not a Server.
IPS153T	Yes	Yes, if not a Server.
IPS300T (and 320/340/360)	Yes	Yes, if not a Server.
IPS400T (and 420/440/460)	Yes	Yes, if not a Server.
IPS266T/IPS267T (VM)	Yes	n/a

TimeIPS What's New

The TimeIPS system is continually improved and enhanced. New modules, features and options are available on a regular basis.

TimeIPS releases are tracked in "major" versions and "minor " versions. References to major versions use two numbers, for example, 1.11 or 2.0. Minor versions include three numbers, for example, 1.11.51 or 2.0.4. Major versions include significant changes, features and enhancements. Minor versions include smaller changes, fixes and improvements. Upgrading to a new major version requires an active TimeIPS update account and, because there are so many important changes, an email or phone call to TimeIPS technical support requesting the change. New minor versions are always available (do not require an update account) and do not require contacting technical support.

*All TimeIPS updates (major and minor) are installed with the built-in automatic update system. Update to by going to System -> Updates and clicking the **Update Now** button. Make sure the **Automatic Updates** checkbox is checked if you would like to receive minor version updates automatically.*
For more details on updates and update accounts, please see the "TimeIPS Updates" section in the TimeIPS Services article.

Select your version from the following links to view the latest additions and changes to your TimeIPS system:

To view an interactive overview of differences between versions, view the TimeIPS Features By Version page.

New Release - Version 2.1

Current versions:

- Version 2.1 Migration Guide from Version 2.0 to 2.1
- Version 2.0 Migration Guide from Version 1.11 to 2.0 General Release
- Version 1.11 Migration Guide from Version 1.10 to 1.11
- Version 1.10 Migration Guide from Version 1.9 to 1.10
- Version 1.9 Migration Guide from Version 1.8 to 1.9
- Version 1.8 Migration Guide from Version 1.6 to 1.8

Note on older versions: If you are running TimeIPS series 1.5 or older, we highly recommend an upgrade to Version 1.6 or later.

- Version 1.6
- Version 1.5
- Version 1.4
- Version 1.2
- Version 1.1

See Also:
Modules/Upgrades
Update TimeIPS to the Newest Version
TimeIPS What's New - Version 1.1
TimeIPS What's New - Version 1.2
TimeIPS What's New - Version 1.3
TimeIPS What's New - Version 1.4
TimeIPS What's New - Version 1.5
TimeIPS What's New - Version 1.6
TimeIPS What's New - Version 1.8
TimeIPS What's New - Version 1.9
TimeIPS What's New - Version 1.10
TimeIPS What's New - Version 1.11
TimeIPS What's New - Version 2.0
TimeIPS What's New - Version 2.1

VM & Hardware Server: Initial Configuration

The steps for the initial configuration of your TimeIPS network or VM server are outlined in this article.

TimeIPS Server Types

TimeIPS Servers are available as dedicated hardware servers (network appliances), hosted accounts (TimeIPS ASP), or as a virtual machine (TimeIPS VM). The configuration process for each is similar after the server is running. (See the **ASP Initial Configuration article** to setup your new ASP system.)

- Hardware Server: Requires connection to your network and power. Initial configuration requires a monitor and keyboard to determine/set the IP address.
- TimeIPS VM: Load the virtual machine on a host system and configure ports per the instructions that accompany the VM.

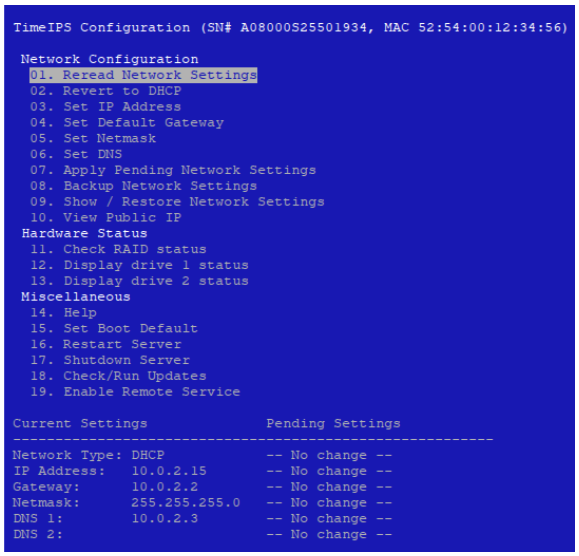
The Configuration Process

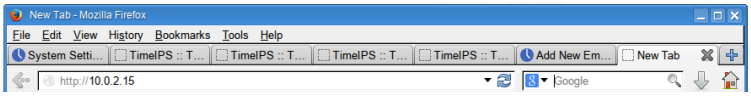
After your server is accessible on the network, the configuration process includes reviewing and accepting the license agreement, entering basic company information and creating a Full Access "Administrative Employee." The configuration process usually just takes a few minutes. Once completed, you can add and edit all settings and employee records as needed.

> **The Full Access Employee**
>
> The employee created on the initial configuration screen will have Full Access permissions and will be an "Administrative Employee." This employee will initially have full administrative privileges and will have access to all parts of the system and system settings. This employee will be able to assign permissions to other employees, and with the optional IPSPRM Enterprise Permissions Module, can create and maintain permissions profiles.

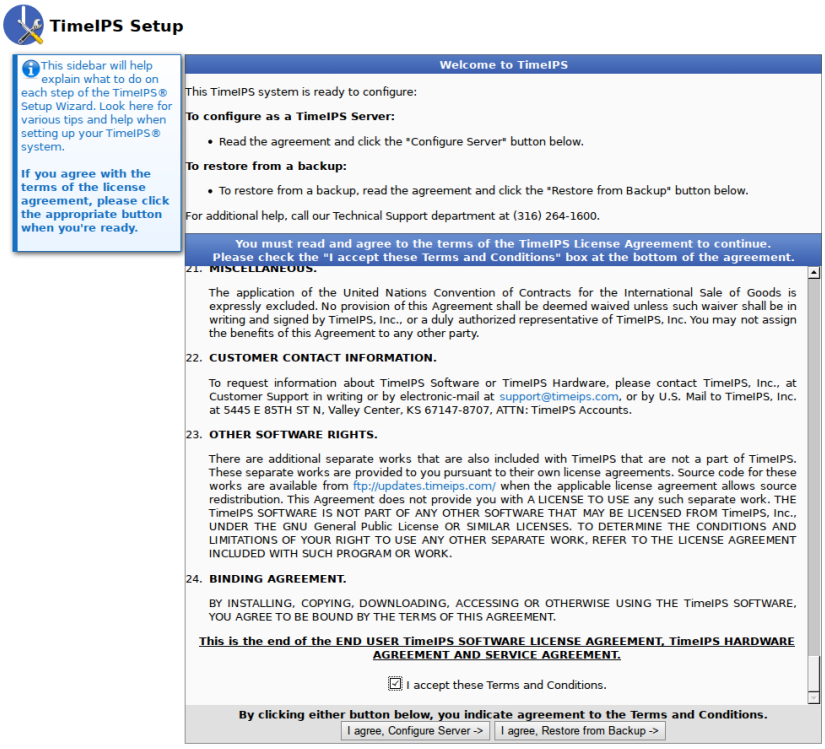
TimeIPS VM & Hardware Server: Initial Configuration

Once a TimeIPS hardware server has been connected to your network, you will need a PC or laptop with a web browser to navigate to the IP address shown on a monitor (or optional LCD Display) connected to the TimeIPS Server. After the boot process is completed, select "Configure Network" on the initial menu, then "Show Network Info" to view the current IP address.





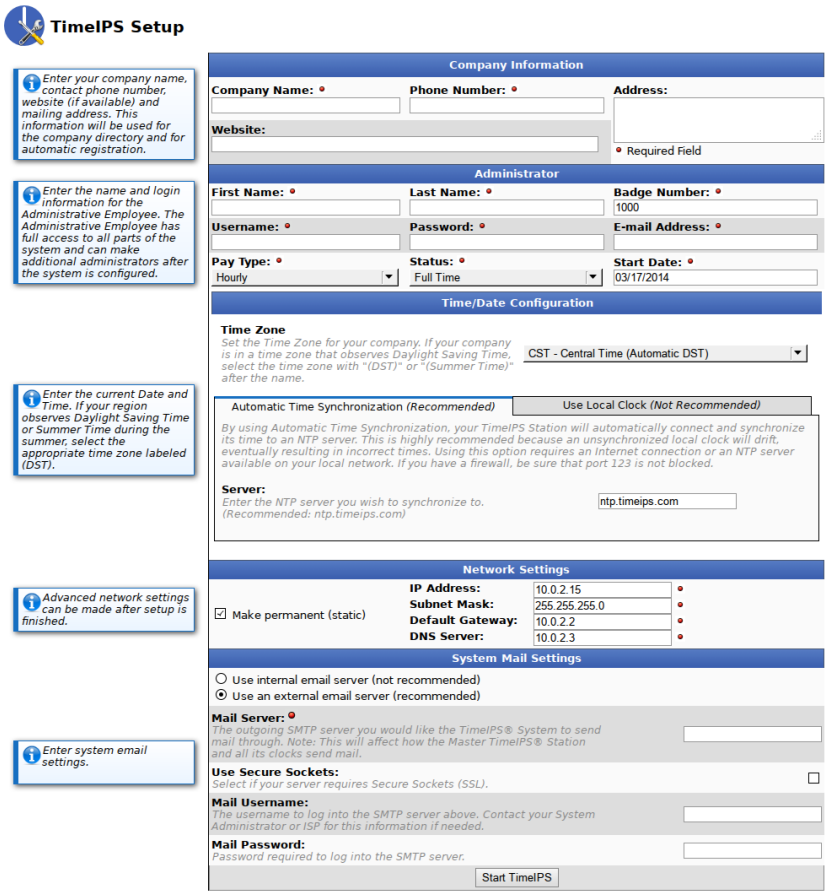
1. Enter the IP address into the address bar of your web browser and hit Enter. The **Welcome to TimeIPS** screen will appear.



2. Accept the License Agreement and click on the **I agree, Configure Server** button.

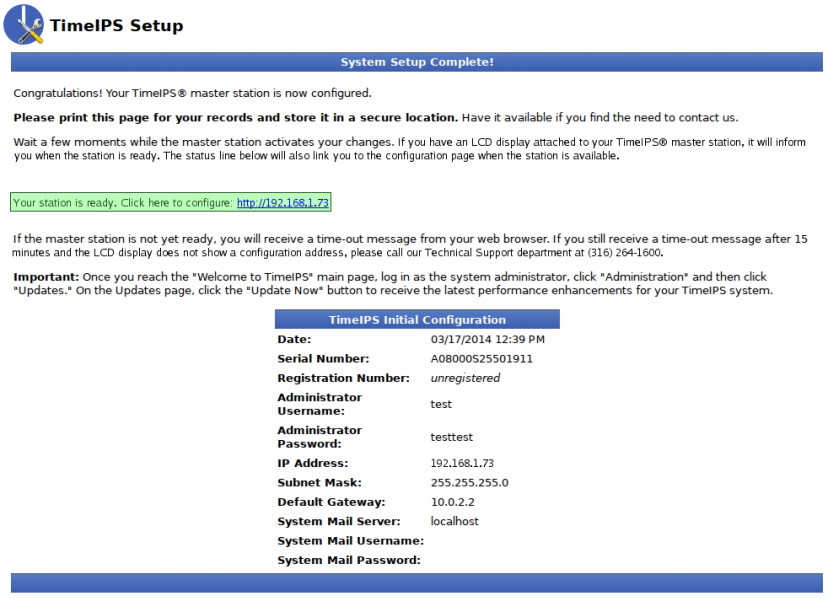
NOTE: You will need to scroll to the bottom of the License Agreement and check the box at the bottom in order to activate the "I Agree, Configure Server" or "Restore from Backup" buttons.

3. The **Company Information** screen will appear. Enter your company information, administrator details, date and time, network settings and system email settings.



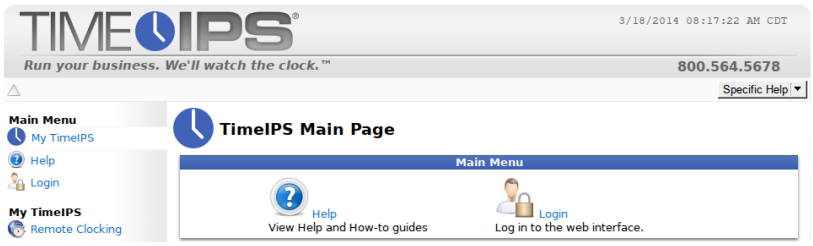
4. Once you have completed adding your details to the **Company Information** screen (above), click on the **Start TimeIPS** button.

5. You will see the message **"System Setup Complete"** with the TimeIPS Initial Configuration information at the bottom of the screen. We recommend you print this page and keep the hard copy in a safe location.



6. Click on the IP address link next to **"Your station is ready. Click here to configure"**.

7. The **TimeIPS Main Page** will appear. Click the **Login** link and enter your Username and Password.



8. Once logged in, you are ready to start configuring your company policies.

Prepare Your System for Employees

It is essential that you begin by creating **OverTime Policies**, **Workweek Groups** and **Payroll Types** for your employees to belong to when you add them. Please read Understanding Overtime Policies and Workweek Groups and be sure that when adding employees, you assign them to an appropriate Workweek group.

It is a good idea to also configure **Holidays** and your **New Employee Defaults** before adding employees.

Prepare Your Employee Data

You can manually enter your employees into TimeIPS (see instructions below) or you can import the employee data from a spreadsheet. (See Importing/Updating Employee, Department, or Site Information.)

An employee's first and last name and a unique identifier (such as an employee number or badge number) are all that are initially required to set up an employee record. However, TimeIPS has the ability to maintain a vast array of employee details. Additional employee information can be added or edited at any time after the employee record has been created.

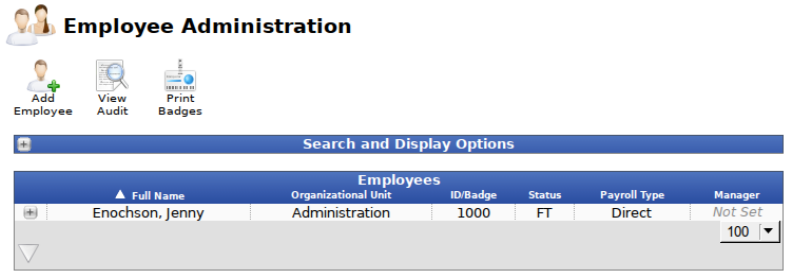
For initial setup, we recommend you prepare a list of your employees by first and last name and a unique identifier, such as an employee number or badge number.

NOTE: TimeIPS uses the badge number field to store the unique identifier for each employee. TimeIPS will automatically generate badge numbers for your employees if you do not assign them.

Manually Add Employees to TimeIPS

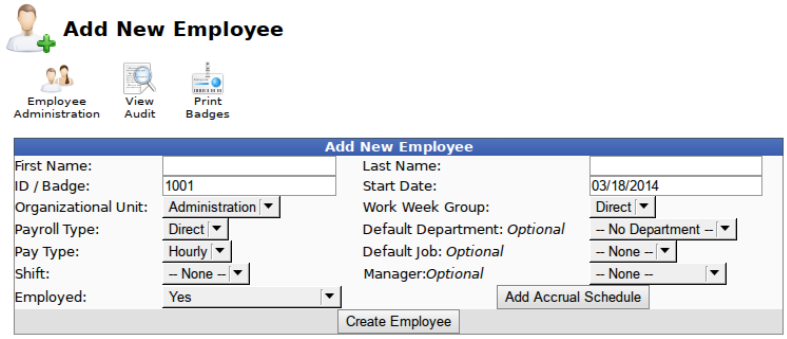
See the Tabbed Employee Administration View for more information about the different employee tabs.

Using the left pane Main Menu » Administration, click on: Employees » Employees



The Employee Administrator (Jenny Enochson, in the above example) will be the first employee record in your TimeIPS system.

1. Click on the **Add Employee** icon to begin adding employees to TimeIPS.



2. Add the employee's first and last name, modify the badge number if needed, select the appropriate Payroll Type, Work Week Group, etc. then click on **Create Employee**. Repeat this step until all employees have been added.

Once your employees are entered into TimeIPS, your TimeIPS system is ready for employees to begin clocking!

See Also:
What's Next?
What's New in TimeIPS?
Initial Configuration of a ASP System

Initial Configuration of an ASP System

The steps for the initial configuration of your TimeIPS ASP server are outlined in this article.

TimeIPS Server Types

TimeIPS Servers are available as dedicated hardware servers (network appliances), hosted accounts (TimeIPS ASP), or as a virtual machine (TimeIPS VM). The configuration process for each is similar after the server is running. (See the **VM & Hardware Server: Initial Configuration** article to setup your new network or VM system.)

- TimeIPS ASP Account: Requires an Internet connection. Then, just browse to the URL and port number provided when you activated your account.

The Configuration Process

After your server is accessible on the network, the configuration process includes reviewing and accepting the license agreement, entering basic company information and creating a Full Access "Administrative Employee." The configuration process usually just takes a few minutes. Once completed, you can add and edit all settings and employee records as needed.

> **The Full Access Employee**
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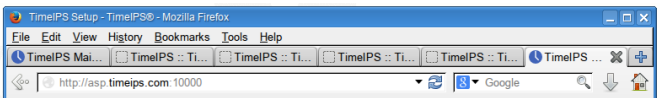
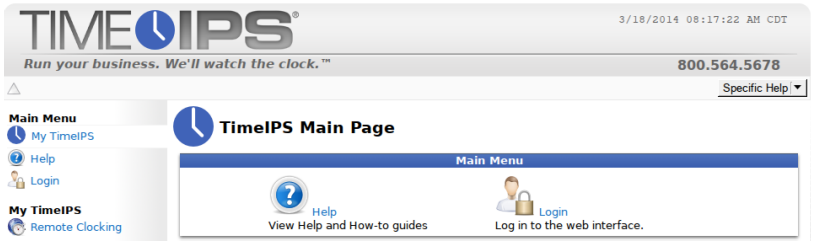
> The employee created on the initial configuration screen will have Full Access permissions and will be an "Administrative Employee." This employee will initially have full administrative privileges and will have access to all parts of the system and system settings. This employee will be able to assign permissions to other employees, and with the optional IPSPRM Enterprise Permissions Module, can create and maintain permissions profiles.

TimeIPS ASP Server: Initial Configuration



1. Type your IP address (http://asp.timeips.com:*your-port-number*) into the address bar of your web browser and hit Enter.

2. The **TimeIPS Main Page** will appear. Click the **Login** link and enter your Username and Password.



3. Once logged in, you are ready to start configuring your company policies.

Prepare Your System for Employees

It is essential that you begin by creating **OverTime Policies**, **Workweek Groups** and **Payroll Types** for your employees to belong to when you add them. Please read Understanding Overtime Policies and Workweek Groups and be sure that when adding employees, you assign them to an appropriate Workweek group.

It is a good idea to also configure **Holidays** and your **New Employee Defaults** before adding employees.

Prepare Your Employee Data

You can manually enter your employees into TimeIPS (see instructions below) or you can import the employee data from a spreadsheet. (See Importing/Updating Employee, Department, or Site Information.)

An employee's first and last name and a unique identifier (such as an employee number or badge number) are all that are initially required to set up an employee record. However, TimeIPS has the ability to maintain a vast array of employee details. Additional employee information can be added or edited at any time after the employee record has been created.

For initial setup, we recommend you prepare a list of your employees by first and last name and a unique identifier, such as an employee number or badge number.

NOTE: TimeIPS uses the badge number field to store the unique identifier for each employee. TimeIPS will automatically generate badge numbers for your employees if you do not assign them.

Manually Add Employees to TimeIPS

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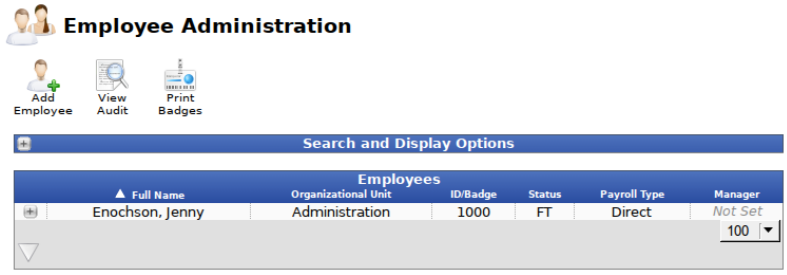

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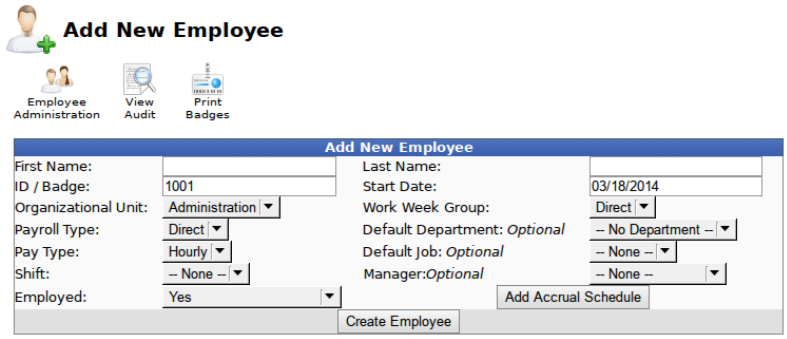
1. Click on the **Add Employee** icon to begin adding employees to TimeIPS.



2. Add the employee's first and last name, modify the badge number if needed, select the appropriate Payroll Type, Work Week Group, etc. then click on **Create Employee**. Repeat this step until all employees have been added.

Once your employees are entered into TimeIPS, your TimeIPS system is ready for employees to begin clocking!

See Also:
What's Next?
What's New in TimeIPS?
VM & Hardware Server: Initial Configuration

Administrator's Implementation Guide

This guide for TimeIPS administrators covers the initial process of configuring and understanding the TimeIPS system. After reviewing this documentation fully, should you have any further questions, please use the knowledgebase search, or contact TimeIPS Support at 316-264-1600.

Thank you! for purchasing a TimeIPS system. Your new TimeIPS system is designed to save you money by simplifying your employee time tracking, streamlining your payroll preparation and increasing your workforce productivity.

*(For aid in navigating this guide, there are multiple "hyperlinks" that will take you to the corresponding article in the TimeIPS knowledge base. Simply click on the subject link in **BLUE** or **PURPLE** (color may vary depending on your browser) anywhere in this document to get more information on that particular subject.)*

Process Overview

This is the general process that you will follow to implement your new TimeIPS system:

1. **Installation of Hardware - Use the printed guides that came with the hardware.**
2. **Settings and Configuration of the TimeIPS System - Read This Administrator's Implementation Guide**
3. **Manager Training - Provide a link to, or print and distribute the Manager's Guide to TimeIPS to all managers using the TimeIPS system. Additionally, there is a *Manager Introduction Video* located at TimeIPS Training Videos.**
4. **Employee Training - Prepare and distribute the Employee's Guide to TimeIPS to all employees using the TimeIPS system, including managers. Additionally, if you're using swipe biometrics, there is a *Fingerprint Swipe Training Video* located at TimeIPS Training Videos**

Administrator's Overview

Besides the installation and training, there are three key areas that a TimeIPS System Administrator **MUST** be informed about and comfortable with because these three areas **MUST** be configured correctly for your TimeIPS system to perform as efficiently as possible. These three areas are **Overtime Policies, Workweek Groups, and Payroll Types**. We will cover these three areas first.

Overtime Policies - *Overtime Policies define how overtime is calculated for workweeks. Once you have reconciled your company policies with your local, state and federal regulations, you can then begin to set up your Overtime Policies within the TimeIPS system. For more instruction on how overtime policies work and the configuration of overtime policies within the TimeIPS system, please see the documentation below.*

- Understanding Overtime Policies and Workweek Groups
- Configuring Overtime Policies

Workweek Groups - *Workweek Groups allow administrators to manage sets of employees who follow the same workweek schedule and have their overtime calculation done in the same way.*

- Understanding Workweeks and Workweek Groups
- Configuring Workweek Groups

Payroll Types - *Payroll Types group employees with the same payroll period. Payroll runs once for each payroll period for each Type. Time Reports and Special Reports may be viewed by Payroll Type.*

- Payroll Types
- Import/Export Payroll Types

Once you have successfully and correctly configured the three main settings above, you can configure the other areas of the TimeIPS system as needed:

- **Employees**
  - Employee Management
  - Importing Employee, Organizational Units, Department or Site Information
  - Customize and Print Employee Barcode Badges
  - Terminating/Rehiring Employees
  - Employee Permissions
    - Permission Levels
  - Organizational Unit Administration
  - Department Administration

- **General Help**
  - What's New In TimeIPS
  - Getting Starting with TimeIPS
  - Clocking In and Out of TimeIPS
  - Using the Calendar Icon
  - Daylight Savings Time Configuration

- **TimeIPS Directory**
  - Entering Company Information for the Directory
  - Employee Directory
  - Employee Status View
    - Adding/Removing a Status Message
    - Using Global Status Message

- **TimeIPS Reports**
  - Overview of TimeIPS Reports
  - Time Edit Reports
    - Managing Detailed & Summary Report Presets
    - Editing Time In/Out or Adding Notes to Time Events
  - Special Reports
    - Audit Report
    - Employee Summary Report
    - Missing Clockout Report
    - Site Summary Report
    - Work Order Report
    - Default Job Report
    - Employee Report Card
    - Management Hierarchy
    - Absentee Report
    - Attendance Hours
    - Attendance Percentage Report
    - Break Violation Report
    - Schedules Per-Hour
    - Schedule Violations
    - Tardy Report
    - Tardy Report by Schedule

        - Approvals
        - Custom Report
        - End of Week Mailer
        - Sign-Off Report
        - Worked Months

- **Benefits**
    - Accruals
        - Accrual Group Association
    - Set, Reset, & Recalculate Benefits Usage
    - Importing/Exporting Benefits
    - Advanced Benefits Tracking Module
    - Benefits Request and Approval Module
        - Benefits Request and Approvals Module - Employee View
        - Benefits Request and Approvals Module - Manager View
    - Benefits Training Video
    - Holidays
        - Holiday Reporting
        - Manually Holidays
        - Automatic Holidays
        - Holiday Groups

- **Payroll**
    - Payroll Types
        - Import/Export Payroll Types
    - Time Edit/Reports
        - Managing Detailed & Summary Report Presets
        - Editing Time In/Out or Adding Notes to Time Events
        - Special Reports
    - Overtime Policies
    - Defining Overtime and How Hours Are Paid Out
    - Adjust Work Week Settings
    - Import/Export Payroll Types
    - ADP Export Settings
    - Ceridian Insync Export Settings
    - Creative Solutions Export Settings
    - Custom Payroll Settings
        - Advanced Formatting for Custom Payroll
    - Fortune 1000 Export Settings
    - Manual Payroll Export
    - Paychex 5 Export Settings
    - Paychex Paylink 9 Export Settings
    - Paychex Preview 6.4 (RapidPay) Export Settings
    - Paywork
    - Peachtree Export Settings
    - PeopleSoft 8 Export Settings
    - QuickBooks Integration - Setup TimeIPS (version 1.6)
        - Quickbooks Integration - Setup QuickBooks
        - QuickBooks Integration - Setup TimeIPS
        - QuickBooks Integration - Run Payroll
    - MasterBuilder Integration - Setup MasterBuilder
        - MasterBuilder Integration - Setup TimeIPS
        - MasterBuilder Integration - Payroll Export

- **Sites**
    - Site Management
    - Importing/Exporting Employee, Department or Site Information

- **Job Tracking**
    - Job Management
    - Print Job Barcode Labels
    - Job Categories
    - Job Customers
    - Job Management Import/Export
    - Real-Time Work Order Tracking

- **TimeIPS Clocking Features**
    - Understanding Clocking
    - ID/Badge Functions
    - Biometric Validation
    - Schedules
    - Schedule Group
    - Group Clocking
    - Remote Clocking
        - Customizing Remote Clocking
    - Telephone Clocking
        - Telephone Clocking Menu Options
        - Telephone Clocking Manager's Menu Options
    - Relay Controls
        - Signaling the Beginning/End of a Shift (Example)
        - Providing Access Control Between Two Areas (Example)
        - Example Devices

- **System Administration**
    - System Settings
        - Company Documents
        - Restarting/Shutting Down TimeIPS
        - Adjusting Time/Date Settings
        - Adjusting SMTP Mail Settings
        - Installing a UPS Battery Backup
        - Viewing Redundant Storage Status
        - Adjusting Network Settings
    - Adjusting Company Information for the Directory
    - Web Access Logs
    - Clock Configuration
        - Configuring & Installing a Network Clock
        - Global Clock Settings
    - Updates
    - Modules/Upgrades
    - Backups
    - Security
    - Warranty/Service
    - TimeIPS Store

- **Troubleshooting**

- Cannot Send/Receive E-mails
- Data is Cut Off When Printing Through the Web Browser
- Password Reset/Forgotten Password
- LCD Display Has Rows of Light
- LCD Display is Black
- Ports Used By TimeIPS
- TimeIPS Will Not Power On
- Unable to Access TimeIPS
- Relay Control Does Not Activate
- DynDNS
- Wide Area Network

- **Enhancing Your TimeIPS System**
  - Modules/Upgrades
    - IPSABO - TimeIPS Automatic Backup Options Module™
      - IPSABO - PDF DataSheet
    - IPSAPP - Approvals Module™
      - IPSAPP - PDF DataSheet
    - IPSASH - Advanced Scheduling Module™
    - IPSBEN - Advanced Benefits Tracking™
      - IPSBEN - PDF DataSheet
    - IPSBRD - Burdened Rate Module™
      - IPSBRD - PDF DataSheet
    - IPSCAPI - TimeIPS Client API Module™
    - IPSCDF - Custom Data Fields Module™
    - IPSCLT - TimeIPS Time Clock Station Support Module™
    - IPSDBRO - Database Read-Only Access™
    - IPSDIV - Division Module™
      - IPSDIV - PDF DataSheet
    - IPSEMA - Employee Mobile Application Clocking License Module™
    - IPSEML - TimeIPS Email Automation Module™
    - IPSEMP - TimeIPS 10 Additional Employees Module™
    - IPSEPC - Customizable Payroll Export™
    - IPSEPI - Enhanced Payroll Integration™
    - IPSHOTSCH Hot Schedules Integration Module™
    - IPSIAPI - TimeIPS Import/Export API Module™
    - IPSIMP - Employee Import/Export Module™
      - IPSIMP - PDF DataSheet
    - IPSIPS - Intelligent Personnel System Upgrade Module™
      - IPSIPS - PDF DataSheet
    - IPSJOB - Real-Time Job/Project Tracking Module™
      - IPSJOB - PDF DataSheet
    - IPSJWO - Real-Time Work Order Tracking Module™
      - IPSJWO - PDF DataSheet
    - IPSLNK - Custom Links Module™
    - IPSLOGIN - Login Integration (LDAP, etc.) Module™
    - IPSMMA - Manager Mobile Application Clocking License Module™
    - IPSOTO - Advanced OverTime Options Module™
      - IPSOTO - PDF DataSheet
    - IPSPAPI - TimeIPS Payroll API Module™
    - IPSPRM - Enterprise Permissions Module™
      - IPSPRM - PDF DataSheet
    - IPSPWT - Piecework, Tips, Commissions and Bonuses Module™
      - IPSPWT - PDF DataSheet
    - IPSQBI - Payroll Integration with Benefits Tracking Module™
      - IPSQBI - PDF DataSheet
    - IPSREM - PC and Web-Based Clocking for Mobile Devices ™
      - IPSREM - PDF DataSheet
    - IPSREMDTC - Remote Clocking License for 1 Desktop/Laptop Module™
    - IPSREMDTE - Remote Clocking via Desktop/Laptop for 1 Employee Module™
    - IPSRPT - TimeIPS Custom Reporting Module™
      - IPSRPT - PDF DataSheet
    - IPSSAPI - TimeIPS Server API Module™
    - IPSSCH - Scheduling Module™
      - IPSSCH - PDF DataSheet
    - IPSSDIV - Sub Division Module™
    - IPSSEC - Enterprise Enhanced Security Module™
      - IPSSEC - PDF DataSheet
    - IPSSFT - Shift and Shift Differential Module™
      - IPSSFT - PDF DataSheet
    - IPSSITE - TimeIPS Site Management Module™
    - IPSSYNC - Automated Synchronization Module™
    - IPSVTE - Visual Time Edit Module™
  - TimeIPS Technical Support™ - (60 minutes)
  - TimeIPS System Password Recovery™
  - 12-Month TimeIPS Update™
  - 12-Month TimeIPS Off-Site Daily Backup™

See Also:
What's New In TimeIPS
Administrator's Implementation Guide
Administrator's Implementation Guide

Clock In and Out from the TimeIPS Station

Once employees have been entered into TimeIPS with an Employee ID/Badge Number, they can begin clocking in and out. Various employee identification devices are available. Any of the following employee identification devices can be used with any TimeIPS system, although not all are included with every system.

Clocking Modes

TimeIPS clocks offer three operating modes:

- **Smart Clocking Only**

  If you are only using automatic input devices, such as barcode scanners or proximity card readers, you may wish to use "Smart Clocking Only" in order to disable the explicit "Clock In" and "Clock Out" functions, which are designed to be used with a keypad. Older versions of TimeIPS (Prior to Version 1.6) only supported Smart Clocking mode.

- **Explicit Clocking Only**

If you have a keypad, you may wish to use "Explicit Clocking Only" to require employees to specify whether they are clocking in or clocking out. This behavior is recommended to help identify missed clocks and simplify those corrections.

- **Both Methods**

  By default, both methods are accepted. This allows automatic input devices to work, and allows employees to specify the intent of their clock.

Configure clocking modes under Administration -> Clocking -> Clock Configuration on the Input tab.

The clocking mode can be set per clock, so that clocks with automatic input devices can behave differently than clocks with keypads, if desired.

Numeric Keypad Overview

NUMERIC KEYPAD

The keypad is the most common and most versatile clocking device. It allows employees to clock in, clock out, change jobs, check status and enter notes.

Clock Events Using Keypad in "Smart Clocking" Mode

Key Label	Key Name	Description
/ [Info]	Information Code	Retrieves clock-in/out status and hourly time information for an employee
* [ID]	Time Entry Code	Denotes that the following ID number is for time entry
ENTER	Enter Key	Submits job code and/or ID number combinations to the system
Num Lock (if present)	Keypad Lock	Locks and unlocks the keypad
Esc (if present)	Escape	Cancels the current input or exits the current menu
0-9	Number Keys	Used to enter ID numbers and job codes
BS	Backspace	Used to remove last typed character in case of incorrect entry

- A successful clock IN or OUT will generate the "In" or "Out" voice confirmation and the LCD will indicate the current date, time, employee name and time IN or OUT.
- If you mistype when entering any number, use the "BS" (Backspace) key on the keypad to clear incorrectly typed numbers.
- The NumLock key must be active for proper keypad function.

To Clock-In/Clock-Out Using the Numeric Keypad

- Type an Employee ID/Badge Number and press [Enter].
  Example: 112233 [Enter]

To Check Clocked In/Out Status and Hours Remaining

- Type forward slash on keypad followed by an Employee ID/Badge Number and press [Enter].
  Example: /112233 [Enter]

NOTE: Hours remaining only display for hourly employees.

If your system includes Job Tracking

Clock-In to a Job/Change to a New Job

- Type the Job Code * and an Employee ID/Badge Number and press [Enter].
  Example: 4567*112233 [Enter]

"Smart Clocking" Keypad Command Examples

Employee Enters at Keypad/Keyboard: *	WORK STATUS	
	OUT	IN
ID/BADGE# **[NOTE]++ ID/BADGE#**	Clocks employee IN (To default job, if set. Otherwise, no job) Clock In note, if set	Clocks employee OUT Clock Out Note, if set
[JOB CODE] * ID/BADGE# **[NOTE]++[JOB CODE] * ID/BADGE#**	Clocks employee IN to the specified job Clock In Note, if set	Clocks employee OUT, then IN to the specified job Clock Note on previous Out and new In, if set
[DEPT CODE] ** ID/BADGE# **[NOTE]++[DEPT CODE] ** ID/BADGE#**	Clocks employee IN to the specified department Clock In Note, if set	Clocks employee OUT. Department is ignored. Clock Note on Out, if set
[WO CODE] * [JOB CODE] * ID/BADGE# **[NOTE]++[WO CODE] * [JOB CODE] * ID/BADGE#**	Clocks employee IN to the specified work order and job Clock In Note, if set	Clocks employee OUT, then IN to the specified work order and job Clock Note on previous Out and new In, if set
[WO CODE] * [JOB CODE] /[PHASE]* ID/BADGE# **[NOTE]++[WO CODE] * [JOB CODE] /[PHASE]* ID/BADGE#**	Clocks employee IN to the specified work order and job on the specified phase Clock In Note, if set	Clocks employee OUT, then IN to the specified work order and job on the specified phase Clock Note on previous Out and new In, if set
[DEPT CODE] ** [WO CODE] * [JOB CODE] /[PHASE]* ID/BADGE# **[NOTE]++[DEPT CODE]**[WO CODE] * [JOB CODE] /[PHASE]* ID/BADGE#**	Clocks employee IN to the specified department, work order and job on the specified phase Clock In Note, if set	Clocks employee OUT, then IN to the specified department, work order and job on the specified phase Clock Note on previous Out and new In, if set
0 * ID/BADGE# **[NOTE] ++0 * ID/BADGE#**	Clocks employee IN (to default job, if set, otherwise clocks into no job) Clock In Note, if set	Clocks employee OUT, then IN (to default job, if set, otherwise clocks back into no job) Clock Note on previous Out and new In, if set

[DEPT CODE] ** 0 * ID/BADGE# **[NOTE] ++ [DEPT CODE] ** 0 * ID/BADGE#**	Clocks employee IN (to default job, if set, otherwise clocks into no job) and the specified department. Clock In Note, if set	Clocks employee OUT, then IN (to default job, if set, otherwise clocks back into no job) and the specified department. Clock Note on previous Out and new In, if set

** The above commands are followed by pressing [ENTER] on the keypad/keyboard*
Note: Job and Work Order functions require IPSJOB and or IPSJWO modules

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Clock Events Using Keypad in "Explicit Clocking" Mode

Key Label	Key Name	Description	
/ [Info]	Information Code	Retrieves clock-in/out status and hourly time information for an employee	
* [ID]	Change Job	Denotes that the employee wants to change jobs	
+ [Next]	Clock In	Denotes that the employee wants to clock in	
- [Prev]	Clock Out	Denotes that the employee wants to clock out	
ENTER	Enter Key	Submits job code and/or ID number combinations to the system	
Num Lock	Keypad Lock	Locks and unlocks the keypad	
Esc (if present)	Escape	Cancels the current input or exits the current menu	
0-9	Number Keys	Used to enter ID numbers and job codes	
BS	Backspace	Used to remove last typed character in case of incorrect entry	

- A successful clock IN or OUT will generate the "In" or "Out" voice confirmation and the LCD will indicate the current date, time, employee name and time IN or OUT.
- If you mistype when entering any number, use the "BS" (Backspace) key on the keypad to clear incorrectly typed numbers.
- The NumLock key must be active for proper keypad function.
- Additional data may be gathered after entering the badge number, including department, work order, job and note. The prompt mode is set per clock, and can be code input, or selection from a list.

To Clock-In/Clock-Out Using the Numeric Keypad

- Type either + or -, then an Employee ID/Badge Number and press [Enter].
  Example: +112233 [Enter]

To Check Clocked In/Out Status and Hours Remaining

- Type forward slash on keypad followed by an Employee ID/Badge Number and press [Enter].
  Example: /112233 [Enter]

NOTE: Hours remaining only display for hourly employees.

If your system includes Job Tracking

Clock-In to a Job

- Type + and an Employee ID/Badge Number and press [Enter]. Then, enter a job code and press [Enter].
  Example: +112233 [Enter]
  Example: 4567 [Enter]

Change to a New Job

- Type * and an Employee ID/Badge Number and press [Enter]. Then, enter a job code and press [Enter].
  Example: *112233 [Enter]
  Example: 4567 [Enter]

If your system includes Work Orders

Clock-In to a Work Order and Job

- Type + and an Employee ID/Badge Number and press [Enter]. Enter a Work Order code and press [Enter]. Then, enter a job code and press [Enter].
  Example: +112233 [Enter]
  Example: 2000 [Enter]
  Example: 4567 [Enter]

Change to a new Work Order and Job

- Type * and an employee ID/badge number and press [Enter]. Enter a Work Order code and press [Enter]. Then, enter a job code and press [Enter].
  Example: *112233 [Enter]
  Example: 2000 [Enter]
  Example: 4567 [Enter]

"Explicit Clocking" Keypad Command Examples

Employee Enters at Keypad/Keyboard: *	WORK STATUS		
	OUT	IN	IN JOB
+ ID/BADGE#	Clocks employee IN	Clocks employee OUT, then back IN	Clocks employee OUT, then back IN
- ID/BADGE#	Clocks employee IN, then back OUT	Clocks employee OUT	Clocks employee OUT
* ID/BADGE#, JOB#	Clocks employee IN to the specified job	Clocks employee OUT of the default job, then IN to the specified job	Clocks employee OUT of current job and IN to the specified job

** The above commands are followed by pressing [ENTER] on the keypad/keyboard*

Biometric Reader Overview

BIOMETRIC

TimeIPS can validate employee identification using biometric fingerprint/thumbprint authentication. Employees clock in and out of TimeIPS and are asked to present their thumb for validation.

TimeIPS offers multiple types of biometric readers, suited to the needs of different businesses. Please review the enrollment and training instructions that are included in the manual that accompanied your biometric device.

Configuration for biometrics are under Administration -> Clocking -> Biometric Validation

See the article on Biometric Validation (keyword "bio") for details.

Magnetic Swipe Badge Reader Overview

MAGNETIC SWIPE BADGE

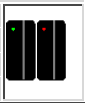
The magnetic swipe badge reader is an optional employee identification device for use with employee magnetic swipe badges.

Swiping a Magnetic Swipe Badge

When preparing to swipe a badge, be sure that the front of the badge is facing away from the indicator light and the badge's magnetic strip is facing toward the light. Insert the badge starting at either end of the reader slot and swipe completely through it, exiting the other side. If swiped correctly, the reader will beep to indicate success. If there is no beep, you may have the card backward. Turn the badge so that the magnetic strip is facing the indicator light and try again.

If the clock event is successful, an audible tone will be heard for "In" or "Out" and the LCD display will indicate the current date and time, employee name and the time IN or OUT.

INDICATOR	EVENT	DESCRIPTION
Green Light	Ready to swipe	The reader is ready to read or has successfully read your badge
Audible Beep	Successful swipe	The reader has successfully read your badge
Red Light	Incomplete Swipe	Swipe the badge again with a full swipe
Does not blink or beep	Badge is backward	Reorient the badge so that the back is facing the indicator light and the magnetic strip is fully inserted into the reader



Setting Up Employee Badges

For information on how to set up employee badges, see the article on Setting Up Employee ID and Badge Numbers for Swipe Badge Systems (keyword "badge").

Barcode Reader Overview

BARCODE SCAN

The barcode badge reader is an optional employee identification device for entering employee time and Job Tracking information.

Typically, barcode readers are used in "Smart Clocking" mode. A Job or Work Order barcode is scanned first, then a badge with a barcode for the employee's ID.

Proximity Card Reader Overview

Proximity readers make it fast and easy for employees to clock IN and OUT. In addition, there's no chance of entering an incorrect badge number, reducing errors and saving time for managers.

PROXIMITY CARD

The proximity badge reader is an optional employee identification device for use with employee proximity badges that offers higher-security employee identification.

Web Browser Overview

WEB BROWSER

The Remote Clocking module allows employees to clock in/out, change jobs and check their status using a computer terminal and web browser.

See the article on Remote Clocking (keyword "remote") for details.

Telephone Clocking Overview

TELEPHONE DIAL-IN

Employees can clock in/out, record a clock note, check current status, and listen to messages.

See the article on Telephone Clocking (keyword "phone") for details.

Wireless Device Overview

WIRELESS WEB DEVICE

Wireless devices such as PDA's and web-enabled phones can be used to clock in/out and check status remotely.

See the article on Remote Clocking (keyword "remote") for details.

General Clocking Overview

		Job/Clock Notes	Jobs	Clock In/Out	Validate Employee's Identity
Identification Devices	**Keypad/ Keyboard**	Type Job/Clock Notes Press <+> key twice	Type Job Code	Press **<ID>** key, Type ID Number, Press **<ENTER>** key	
	Magnetic Swipe Badge Reader			Swipe Employee ID Badge	
	Barcode Scanner		Scan Job Code Label	Scan Employee ID Badge	
	Proximity Card			Touch Employee Badge to reader	
	Biometric Reader				Present Thumb
	VOIP (Voice Over IP)	Select option and Record Voice note	Select option and Enter Job Code	Select Option	Enter PIN number AND/OR Record Name when prompted

Internal Information (visible to Administrators only):

Work Orders Explicit Clocking - Accurate Tables - States & results for Smart Clocking In a job - smart clocking - clock out Add Column - Work Order/Job First Row - Job - Clock Out Completely

See Also:
TimeIPS Store
TimeIPS Clock Station Menu

Understanding Overtime Policies and Workweek Groups

In TimeIPS, an Overtime Policy is a set of rules that allow the payroll engine to calculate overtime. If you have non-exempt employees, this is the most important payroll configuration item in TimeIPS. Workweek groups connect employees to Overtime Policies, and set the legal workweek for weekly overtime rules.

What is an Overtime Policy?

In TimeIPS, an Overtime Policy is a set of rules that allow the payroll engine to calculate overtime.

These rules include such things as:

- The number of hours worked in a day before overtime and/or doubletime starts
- The number of hours worked in a week before overtime and/or doubletime starts
- Special rules such as 7th day overtime

What is a workweek?

A workweek is a 168 hour period consisting of seven 24-hour days. In many areas, labor laws dictate that after a certain number of hours in a workweek, additional work must be paid as overtime. The seven 24-hour days within the workweek are called workdays, and in some areas, labor laws dictate that after a certain number of hours in a workday, additional work must be paid as overtime. Most businesses will have workweeks and workdays aligned with calendar days, but this is not required. When employees follow workweeks that start in the middle of the calendar day, most reports and exports will follow the workweeks and workdays, rather than calendar days.

What is a Workweek Group?

Workweek Groups provide:

- A way to connect employees to Overtime Policies
- A way to set the starting day and time of workweeks for employees
- A way to change the effective Overtime Policy over time

What is the purpose of having an "Overtime Policy?" Isn't overtime just time over 40 hours in a week?

In some locations, with some kinds of employees, working a single shift, with a steady schedule, overtime might be that simple. But, in many cases it's not.

Overtime policies allow TimeIPS to accurately calculate overtime for employees:

- Working night shifts
- Working changing schedules
- In locations where labor laws have special rules or limits on work each day
- In locations where overtime can trigger on consecutive days
- In locations or with company/union policies that dictate overtime on holidays
- When labor laws or union contracts change over time

How does TimeIPS use Overtime Policies?

Different groups of employees, doing different kinds of work, in different areas, in different years, may all need different overtime rules. TimeIPS allows you to create Overtime Policies for all such situations. Then, TimeIPS allows you to use Workweek Groups to connect Overtime Policies to groups of employees. The connections can change and are tracked by date. Each time an employee works, TimeIPS looks at the Workweek Group the employee belongs to, at that very moment, finds the Overtime Policy in use at that time, and calculates the resulting overtime.

How will I know what overtime rules apply?

It is essential that you know the labor laws that apply to your work force and configure an Overtime Policy to match. This will allow TimeIPS to calculate overtime accurately and will help you comply with labor laws. If you have employees in multiple states, or doing multiple types of work, you may have different labor laws and rules that cover them. TimeIPS will allow you to create an overtime policy for each such group. If you're not sure what laws apply to you:

- We suggest you seek advice from an attorney that specializes in labor law.
- You may also benefit from state websites such as: State Labor Offices
- Read the Fair Labor Standards Act to find out which employees are eligible to declare overtime and which ones are exempt from such regulations. The Fair Labor Standards Act also specifies how much you should pay for overtime (usually one-and-a-half times the normal hourly rate), what happens with overtime hours worked during holidays or weekends and who has the right to approve the overtime.

More suggestions:

- We suggest you create a written policy outlining everything related to overtime and provide this to your employees and managers. This will help reduce questions about overtime calculations performed by TimeIPS.

- If you have questions about how to enter your Overtime Policies into TimeIPS, you can reference the Overtime Policies article in this Knowledge Base. Referencing your written overtime policy will make this procedure very quick and uncomplicated.
- We suggest naming the policy for the area and year of the policy. For example, California 2010. This will make it easy to differentiate future policies you'll make when labor laws change.

TimeIPS Services

TimeIPS services make it easy to keep your system up-to-date, secure and running smoothly. Available services include updates, backup, warranty and support. These are optional and only need to be purchased and used if needed by your organization. Please review the following service information to ensure your needs are met. If you have any questions, or would like to purchase extensions or renewals, please contact TimeIPS Sales at 877.846.3256.

TimeIPS Updates

TimeIPS continuously improves and extends the system and software. These improvements fall into three categories: Major Version Updates, Minor Version Updates and Modules.

	Major Version Updates	**Minor Version Updates**	**Modules**
Requires Active Update Account	Yes	No	Only if module requires a new Major Version
Type of change included	Many new features Major changes to parts of the system All cumulative bug/issue fixes Access to new modules Support for the latest hardware	Limited new features Minor changes to the system Fixes for bugs/issues	Specific major new feature or feature set
Installation Procedure	Review extent of changes and needed preparation with TimeIPS Support. Schedule a time for the update. Update will process automatically when released and usually takes 1-2 hours.	Varies by the content of the update. Usually, updates will apply automatically without any intervention. In order to minimize any chance for unexpected changes, some non-critical updates will only apply as-needed or on request.	Installs automatically overnight after purchase. If Major Version update is required, update will be required before module can be used.
Example Version / Name	1.6.100 to 1.8.61	1.8.60 to 1.8.61	IPSSCH

Off-site Backups

TimeIPS data is critical and we strongly recommend regular backups for all TimeIPS systems. Backups are easy to create, just click on System -> Backups and select "Create Backup." A single backup is good, but as new data comes into TimeIPS every day, a complete backup solution makes backups daily and stores in a secure off-site location. The TimeIPS off-site backup service provides this option in a convenient and easy-to-use package.

TimeIPS servers typically include 12 months of automatic off-site backups. By extending your off-site backup account, you can ensure that backups are being made each day and are stored off-site where they can be accessed to restore your system and/or where they can be accessed by TimeIPS technical support for you in the event that your system or facility were to become inaccessible. Off-site backups provide an affordable, reliable and hassle-free way to ensure you have the data you need, when you need it.

The TimeIPS off-site backup service can be purchased in a variety of file-size designations based on the amount of data stored in your TimeIPS server. As the number of employees and the amount of clock data stored grows over time, you may need to upgrade your backup account to a larger file-size.

For more information about using backups in TimeIPS, please see the Backup System article.

Extended Warranty

TimeIPS hardware typically includes 12 months of limited warranty coverage (see license/warranty agreement for details). The warranty service can be extended at any time during the initial warranty period. An extended warranty is the most cost-effective way to allow TimeIPS to repair or replace any components of your TimeIPS system that wear out or have any other difficulty. To keep your TimeIPS system working smoothly with extended warranties, please contact TimeIPS Sales at 877.846.3256.

Technical Support

877-846-3256

Each TimeIPS system includes an allotment of technical support time to assist with the initial installation/configuration and to answer questions regarding the use of the system's features and capabilities.

TimeIPS Technical Support provides professional, efficient and friendly service over the phone and via e-mail. As well, our online Knowledge Base with comprehensive information regarding each of the TimeIPS features, including step-by-step instructions for using each, is available, free of charge, 24 hours a day, 7 days a week, at http://support.timeips.com.

TimeIPS Technical Support can provide telephone and e-mail based assistance for any aspect of the installation and configuration of your TimeIPS system. In most cases the included time is more than sufficient. For some organizations with complex policies and/or requirements, additional time may be needed. Additional technical support time can be purchased in blocks ranging from 30 minutes to 50 hours. For more information regarding technical support and/or to purchase additional time, please contact TimeIPS sales at 877.846.3256.

My TimeIPS

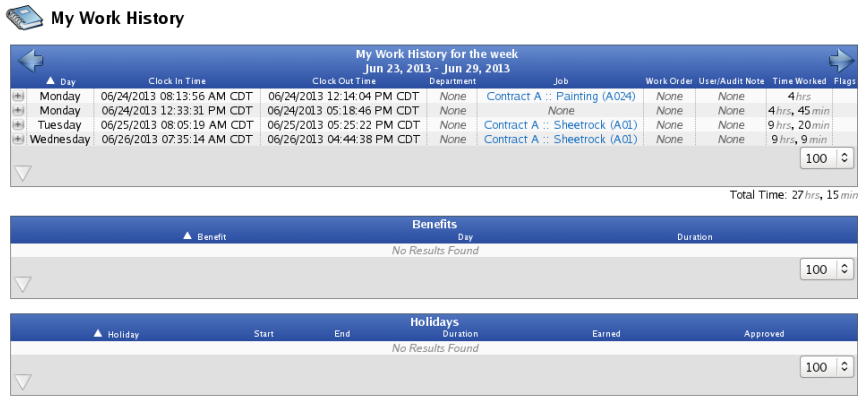
My TimeIPS allows employees to quickly view their work history and weekly schedule. It also allows employees to track time worked on specific jobs, if using the IPSIPS or Unlimited Job Tracking optional modules.

Employee and Manager View may differ depending on permission level assigned.

My Work History

Employees can view their work history and leave notes regarding their time in and out for their manager.

Using the left pane Main Menu, click on: My Work History under My TimeIPS



NOTE: By clicking on an event it will take you to the Edit Event screen. You are unable to edit an event without the proper permission level.

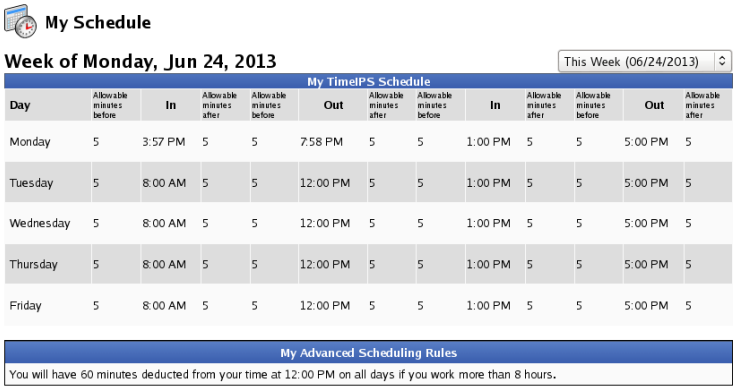
Internal Information (visible to Administrators only):

NOTE: If Biometrics are being used you will not be able to add a note to a time event. Biometrics notes every clock event with "Note: User identified via biometrics" and once the note is added, the day's note is locked and can not be viewed or changed by the employee.

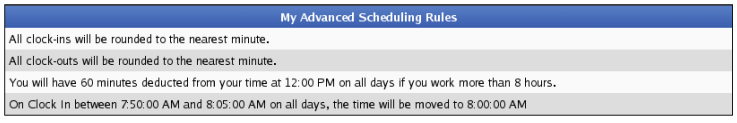
My Schedule

Employees can view their weekly work schedule.

Using the left pane click on: My Schedule under My TimeIPS



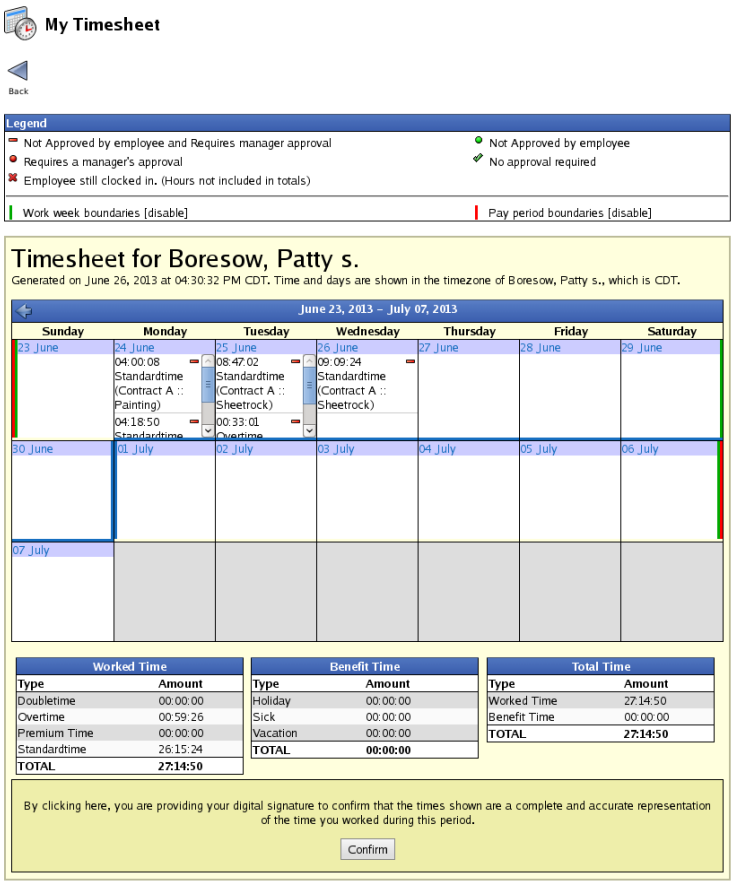
- The **Allowable minutes before** and after the Clock In, Lunch Out, Lunch In, and Clock Out events are listed. The schedule may or may not be set for e-mail notifications and/or enforcements.
- The employee's manager, an Employee Administrator, or a Payroll Administrator can adjust the employee's schedule through the Employees section.
- The **My Advanced Scheduling Rules** display if scheduling rules such as time rounding, automatic lunch deductions, or time snaps (such as shown in the image below) are set for the employee using the optional Scheduling module IPSSCH. To set the rules, click on **Time Adjustments** under Schedules in the left pane.



My Timesheet

Using the left pane, click on: My Timesheet under My TimeIPS

- This will take the employee to their current Timecard and provide an option to approve their time by clicking on **Confirm**.
- To view or approve a previous period click on the arrow **|<** on the left side of the date range bar at the top of the calendar.



- Employees are able to navigate through the different weeks by clicking on the blue arrows on row of the date.

My Benefit Requests

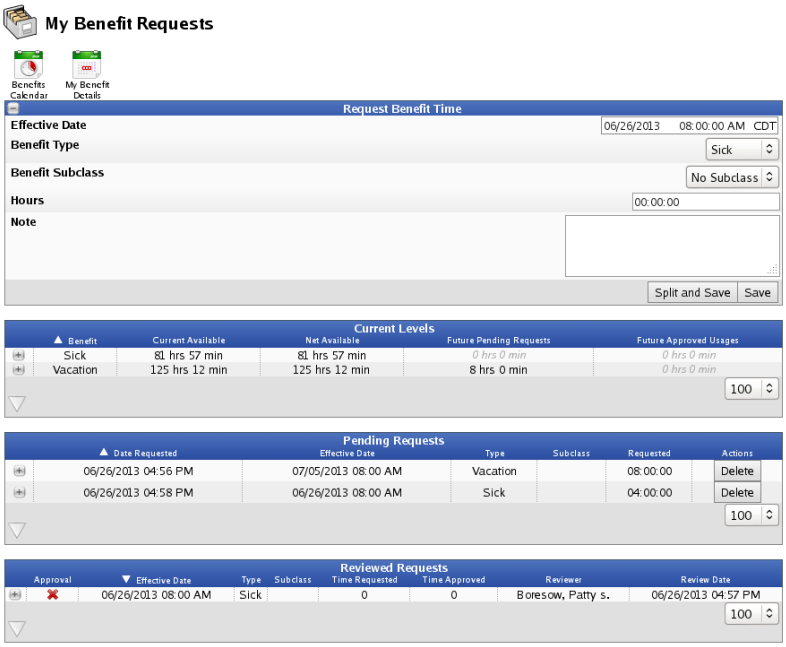
My Benefit Requests allows employees to view their benefits availability and request benefit time. Manager's are automatically notified and can approve or deny the request.

The Benefits Request and Approval module (IPSAPP) is required.

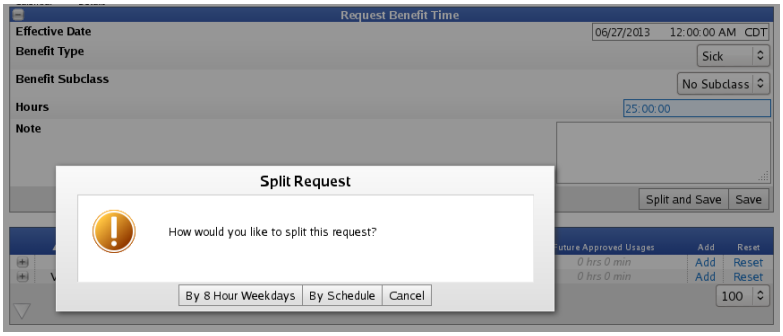
Using the left pane Main Menu » My TimeIPS, click on: My Benefit Request

Create a Benefit Request

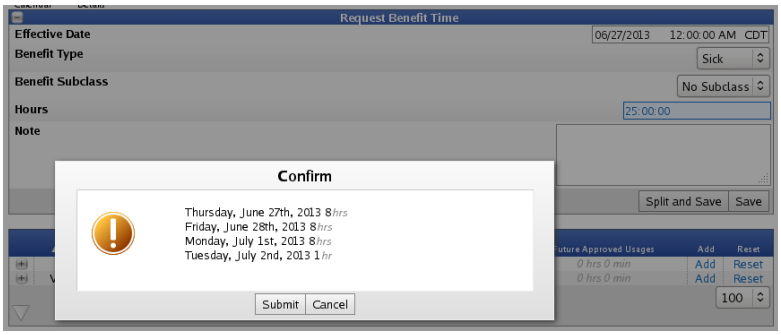
- Click on the **+** sign next to **Request Benefit Time** to expand the window.



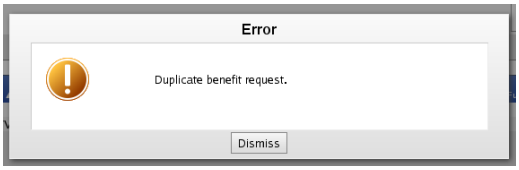
- Enter **Effective Date** of request, **Benefit Type** being used, and the amount of **Hours** requested.
  - Employees also have the option to add a **Note**.
  - If set up in the system, Employees may also specify **Subclass.**
- Click on **Save** or **Split and Save**. **Split and Save** allows employees to enter in hours to be spread across multiple days. A pop-up window will ask if the time should be split **By 8 Hour Weekdays** or **By Schedule.**



- Confirm the split is correct by clicking **Submit**.



- If a benefit request overlaps a previous request, the following **Error** prompt will display.

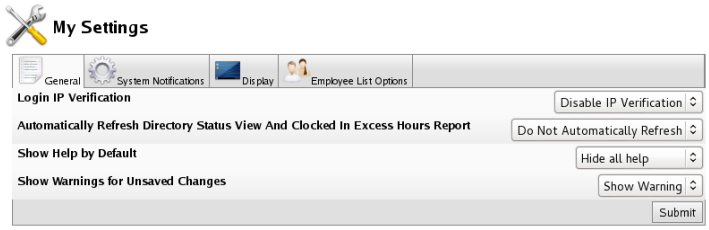


My Settings

Use My Settings to configure IP Verification settings and to set display options in Employee Administration.

Using the left pane Main Menu, click on: My Settings under My TimeIPS.

General tab:



IP Verification *is a security feature to help prevent cross-site scripting exploits. Some Internet Service Providers (ISPs), most notably AOL, use an aggressive proxying system that may result in users being logged out of the TimeIPS system prematurely. If you use AOL or a similar ISP that has confirmed it does aggressive proxying, you may disable IP Verification.*

- The "Enable IP Verification" option prevents a username and password from being used simultaneously from two different IP addresses.
- For users of Internet Service Providers (ISPs) with aggressive proxying systems, such as AOL, the "Disable IP Verification" option may be used to help prevent you from being logged out of TimeIPS prematurely.

- Choose "Refresh Automatically " on the **Automatically Refresh Directory Status View and Clocked In Excess Hours Report** option to automatically refresh the Employee Status View page when employees clock out or once every minute. Otherwise, select "Do not automatically refresh".

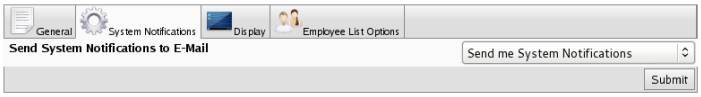
- The default help setting can be changed under **Show Help by Default**. The help icon is always viewable in the top right hand corner of the TImeIPS Interface for quick toggling between views.

- Use the **Show Warnings for Unsaved Changes** section to turn off the friendly reminder that there are unsaved changes.

- After choosing your preferences, click on the **Submit** button to save.

System Notifications tab:

System notifications are notices about operational changes or actions needed in the TimeIPS system. These notifications can be sent to your e-mail.

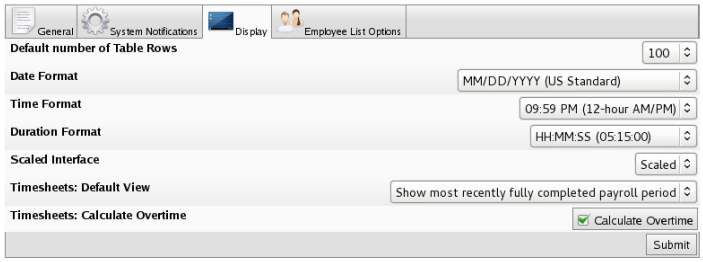


- The **System Notifications** tab is viewable to those with the appropriate permission level.
- Choose **Send me System Notifications** if you want to receive an e-mail regarding operational changes or actions needed in the TimeIPS system.

  TIP: Some examples of system notifications that might be sent are power outage and renewal notifications to Site Administrators, or notification to Payroll Administrators of missing settings for default accrual profiles.

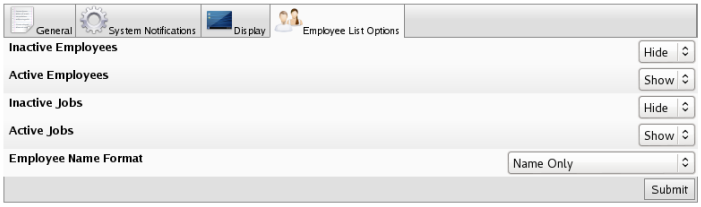
- Choose **Do not send me System Notifications** to disable this option.
- After choosing your preference, click on the **Submit** button to save.

Display tab:



- The **Default number of Table Rows** allows you to select how many rows appear in a table.
- The **Date Format** option lets you select how you would like the date arranged. It gives you 3 **US Standard** selections, 3 **International** selections, and a **ISO 8601 Standard** selection.
- Under the **Time Format,** you can specify between a **12 hour** and **24 hour** display.
- The time can be set to display HH:MM:SS or in decimals under the **Duration Format**.
- You are able to specify between a fixed or **Scaled Interface** within your browser window.
- Under **Timesheets: Default View**, select the default time range to use when viewing timesheets.
- Checking "Calculate Overtime" under **Timesheets: Calculate Overtime**, enables automatic calculation of overtime worked.
- After choosing your preferences, click on the **Submit** button to save.

Employee List Options tab:



- You are able to toggle between hiding and/or showing both Inactive and Active employees on Selection Lists throughout the system.

- You also have the functionality to toggle between hiding and/or showing Inactive and Active jobs on Selection Lists.
- The last option is how you would like the Employee name to be displayed in Selection Lists throughout the entire system.
- After choosing your preferences, click on the **Submit** button to save.

Internal Information (visible to Administrators only):

Automatic Refresh option was added in 1.4.3

Remote Clocking Interface

Remote Clocking allows employees to clock in from a computer or other web browsing device such as a smart phone. To use remote clocking, employees must be individually activated with a checkbox on the Remote Clocking page.

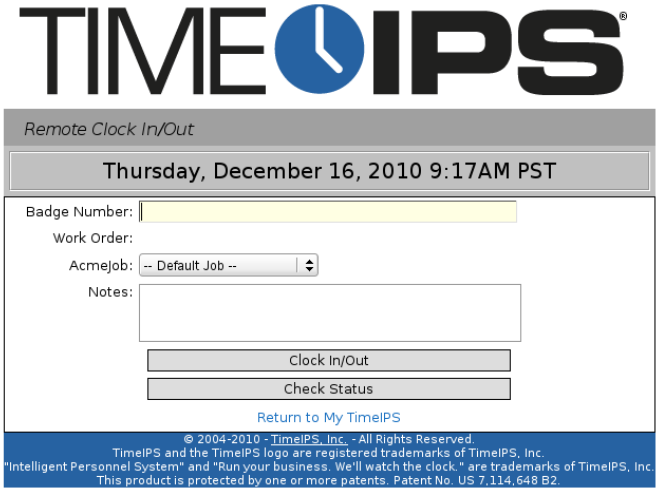
Using the left pane Main Menu, click on: Remote Clocking under My TimeIPS.

-or-

Browse to the TimeIPS IP address followed by /remote/ or a colon and the number 81.

EXAMPLE: If the TimeIPS Master station's IP address is 192.168.1.225, employees will browse to http://192.168.1.225/remote/ or http://192.168.1.225:81 to remotely clock in and out.

The appearance of the Remote Clocking page varies, based on the configuration set on the Remote Clocking Setup page.



The Remote Clock In/Out Screen with Badge Number

1. Enter **a badge number.** If you'd rather use a login name and password, select that option in the configuration.
2. If necessary, select the **Job Code** you will be working on from the pull-down and enter any **Notes**.

NOTE: IPSIPS is required for Job Tracking.

TIP: Notes are stored with the Time In/Out pair. Clock Out notes will not overwrite any notes entered during a Clock In.
NOTE: The Job field name can be renamed in the configuration. In this example, it's set to "AcmeJob."

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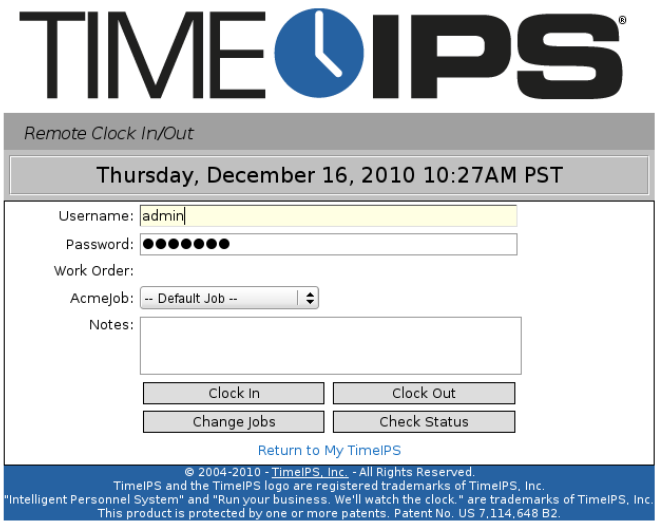
3. Click on the **Clock In**, **Clock Out**, or **Change Jobs** as applicable, or click on the **Check Status** button to view your current clock in/out status.
4. If "Use One-Button Interface" was selected in the Remote Clock Setup options, click on the **Clock In/Out** button to clock in or out, or click on the **Check Status** button to view your current clock in/out status.



The Remote Clock In/Out Screen Using Username and Multi-Button Interface

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NOTE: For instructions on how to clock in/out using customized fields see the article on Customizing Remote Clocking.

Internal Information (visible to Administrators only):

We need to add a section about how to remote clock from out side the network. passably mention the port forwarding and what the customer would actually type in to log in to the clock.

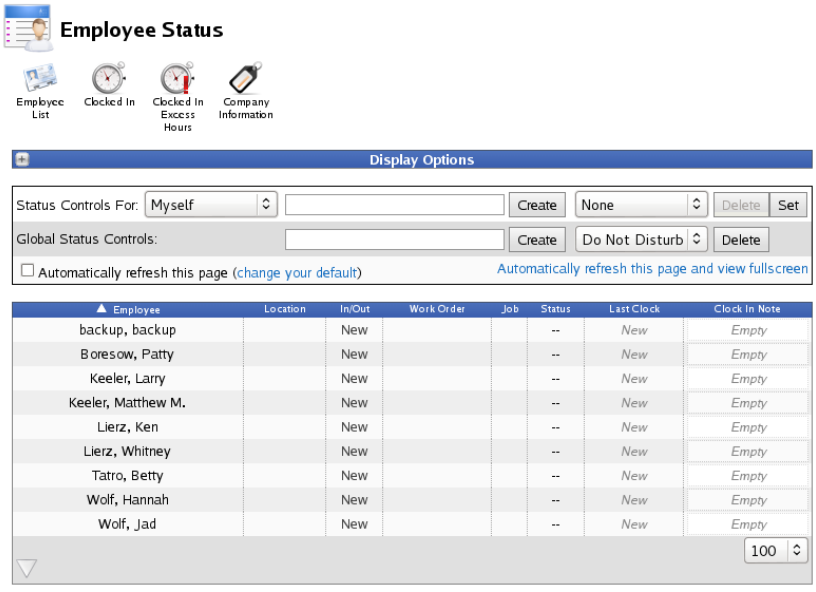
See Also:
Remote Clocking Interface
Remote Clocking

Directory

The Directory allows all employees to view general company and employee information. As well, employees can view, in real-time, who is currently clocked in.

Directory - Employee Status

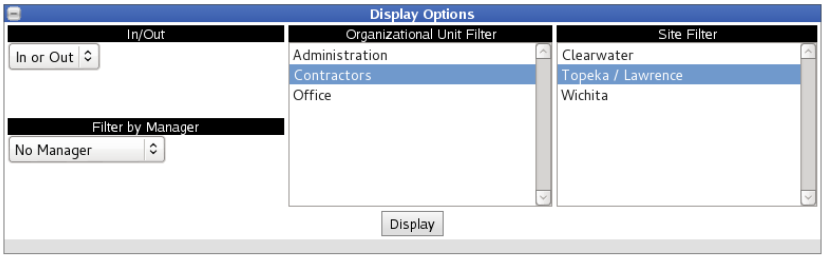
Using the left pane Main Menu, click on: Directory

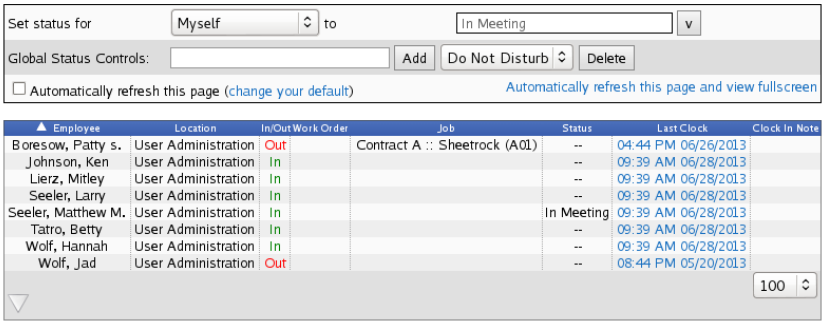


- Click on the + (plus) sign to the left of **Display Options** to view/change the display preferences of the **Employee Status** window below.
- Click on the **Display** button to view the changes made.

- For more detail, go to the Employee Status VIew article.

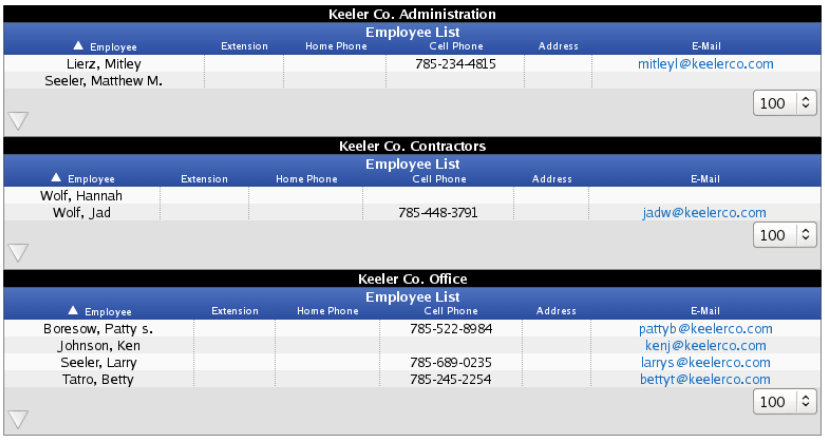
- The middle window allows employees to set their own status, where as admins can set their own and an employee's status.
- Under **Global Status Controls**, Admins can also create and delete the status options that appear in the drop down.
- For more detail, go to the Adding/Removing a Status Message and Using Global Status Message articles.





Employee List

Click on the Employee List Icon



- The **Employee List** information is pulled from the Employee page.

Using the left pane Main Menu » Administration, click on: Employees » Employees

Below is a list of the employee data included on the Directory and the Employee page and field the information is pulled from:

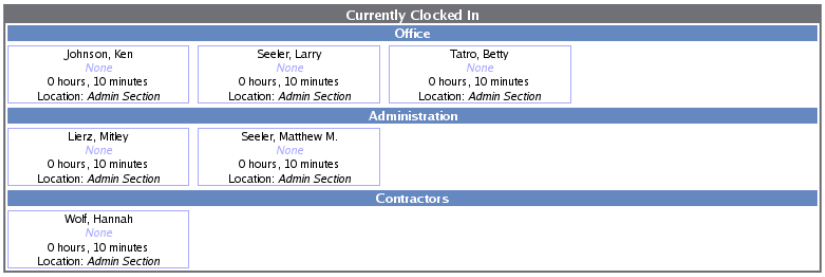
DIRECTORY DATA	EMPLOYEE PAGE	EMPLOYEE FIELD
Name	Personal Information	First Name, Middle Name/Initial, and Last Name
Department	Employment Information	Department
Phone Ext	Contact Information	Phone Extension
Home Phone	Contact Information	Home Phone **NOTE: Check the box next to Publicly Viewable if you want the Home**

		Phone to appear in the Directory.
Cell Phone	Contact Information	Cell Phone **NOTE: Check the box next to Publicly Viewable if you want the Cell Phone to appear in the Directory.**
Address	Contact Information	Address **NOTE: Check the box next to Publicly Viewable if you want the Address to appear in the Directory.**
E-mail	Time Reports/E-mail Alerts	E-mail address marked as Employee's E-mail or Default. **NOTE: Check the box next to Publicly Viewable if you want the Email to appear in the Directory.**

NOTE: Employee phone numbers will display only if marked as Publicly Viewable in the employee's information. To show or hide an employee's phone numbers, see the Contact tab under Employees section.

Clocked In

Click on the Clocked In Icon

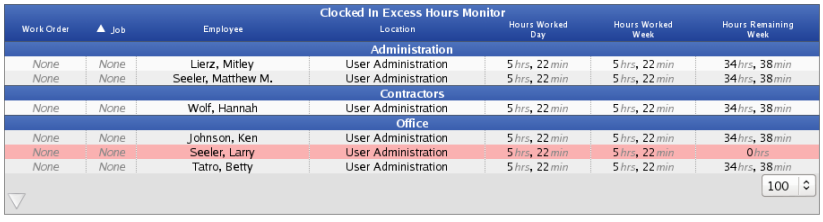


- **Currently Clocked In** Employees are grouped by their Organizational Unit.

NOTE: If there are more employees clocked in than fit on your screen you can click anywhere in the Currently Clocked In box, which will allow you to scroll up and down within the box.

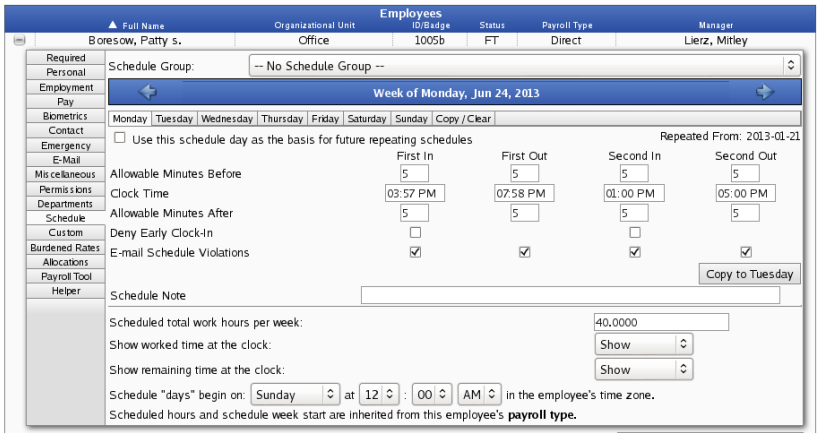
Clocked In Excess Hours

Click on the Clocked In Excess Hours Icon



- Employees exceeding their scheduled total work hours will be highlighted in red. These limits are set in the Employee section on the Schedule Tab.

Using the left pane Main Menu » Administration, click on: Employees » Employees » Schedule



- The bottom half of the **Schedule** tab is used to generate the **Clocked In Excess Hours Monitor**.
- The **Scheduled total work hours per week** would need to be specified. If you would like the employee to see their hours worked or the remaining time to be worked in a week, select "SHOW."
- Employee's schedules must have a start time for the week. Select the **Begins on** day of week and time of day from the drop-down boxes. If an employee's day begins at a time other than midnight, you may want to have one or more of the schedule points fall on a different calendar day. For example, an employee's schedule begins at noon, their first in could be 8pm, first out could be 12am, second in could be 1am, second out could be 4am.

TIP: Click on the "Copy" tab above the daily In/Out times to quickly clear the schedule, load a standard 8-5 schedule, copy Monday to Tuesday-Friday, copy Monday to Tuesday-Sunday, copy a schedule forward to the next week, or to copy one employee's schedule to another's.

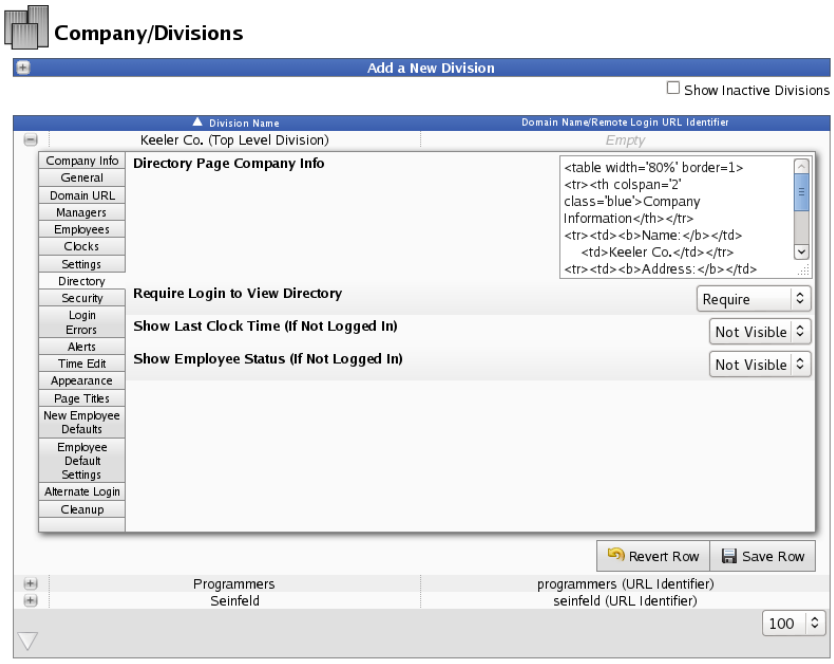
Company Information

Click on the Company Information Icon

Company Information	
Name:	Blue Shades Records
Address:	9876 Rockin Road Chicago, IL 60202
Phone:	1.800.555.1234
Website	http://www.blueshadesrecords.com

The Company information includes general information about your company and can be customized using HTML tags from the Directory section of the Company/Divisions page.

Using the left pane Main Menu » Administration, click on: System » Company/Divisions » Directory



- The **Directory Page Company Info** allows you to customize the information available in the directory with HTML formatting.

TIP: IF you are not familiar with HTML coding, use the example HTML code provided. Locate the example information such as phone number and website then replace it with your company's information. You may also check out one of the many HTML guides available online. Click HERE for an example HTML website.

Additional Directory Options

- **Require Login to View Directory** is by default set to *Require*. Employees must have a username and password in order to view the Company Directory.

NOTE: By changing this option to *Not Required*, anyone with access to your network will be able to view your employee list and contact details. This may not be desirable, especially if your system is port-forwarded to the Internet.

- Select *Visible* under **Show Last Clock Time** if you want the last clocked in date and time of all employees to be viewable by all employees (who are not logged in) on the Employee Status View screen of the Directory page.

- Select *Visible* under **Show Employee Status** if you want all employees (who are not logged in) to be able to view all statuses on the Employee Status View screen of the Directory page.

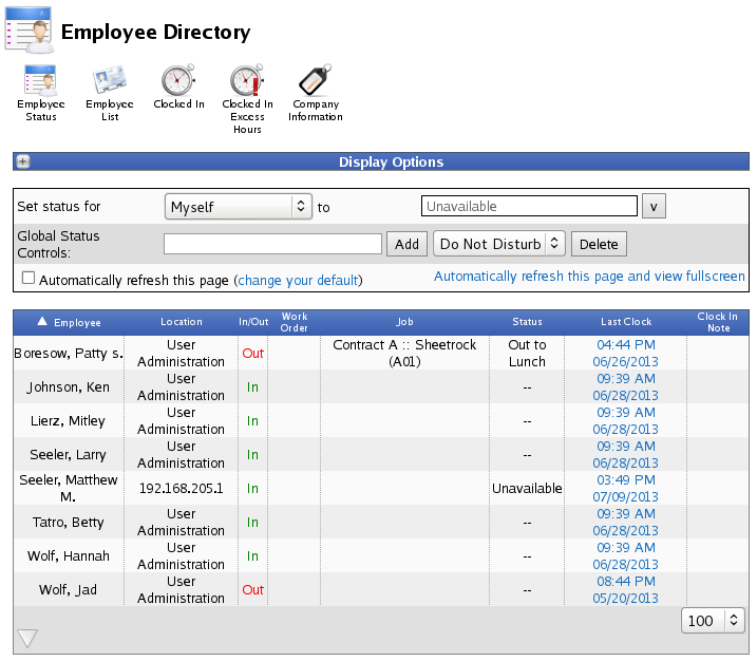
- Be sure to **SAVE ROW** when you have finished making changes.

- Once formatted, your **Company Information** will appear on the **Directory** page.

Employee Status View

The Employee Status View is an electronic In/Out board for tracking employee's status throughout the day.

Using the left pane Main Menu, click on: Directory



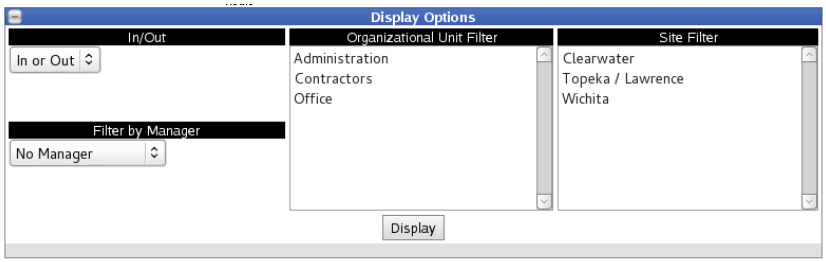
General Information

- All active employees are listed on the Employee Status View screen along with their current In or Out status and the last Job they worked. By default, this information is viewable by all employees.

NOTE: To require employees to be logged in to view employee status, go to Administration >> System >> Company/Divisions >> Directory tab.

- Employees currently clocked IN have their clock status displayed in green text.
- Employees currently clocked OUT have their clock status displayed in red text.

Display Options

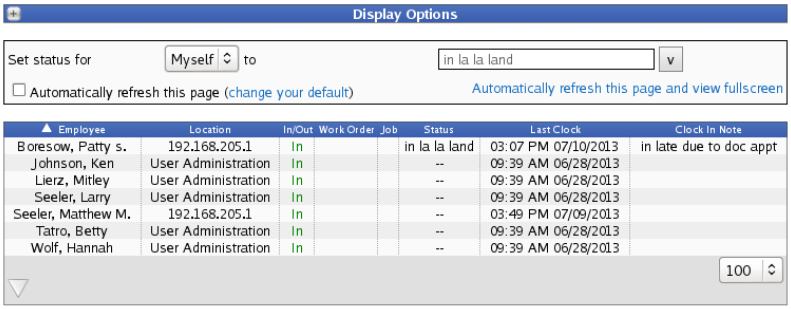


- To expand the **Display Options** window, click on the **+** (plus) sign in the upper left-hand corner of the Display Options bar.
- The Employee Status View can be filtered by clock status (in or out), Manager, Organizational Unit, or Site.

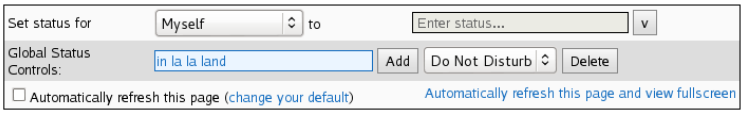
NOTE: Employees who clock in at a site via telephone or remote clocking will not appear on the filtered list unless the applicable site coverage tracking has been set in the Global Settings under Site Administration.

- Choose the filters you want to use, then click on the **Display** button to view the changes made.

Status Messages



- Employees can view the Status message for all employees, but can only edit the Status message for themselves, unless Directory Status permissions have been set up by an administrator.
- Managers can view the Status message for all employees, but can only edit the Status message for themselves, their employees, and/or their employee's employees.
- Those with Directory Status permissions can edit the status message for all employees. See the article on Adding and Removing Status Messages for more information.
- Payroll Administrators can also add, change or remove status messages from the default list by using Global Status Controls since they have Global Directory Status permissions. Those with these permissions can also apply them to other employees/admins.



Automatic Refresh

- When viewing the Employee Status screen, users can choose to automatically refresh the Status View screen at clock out or once every minute by navigating to the Main Menu » My Settings and selecting "Refresh Automatically " on the General tab.

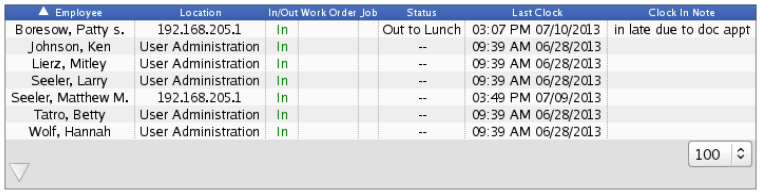
TIP: Click on "change your default" to go directly to the My Settings page.

- If your default setting in My Settings is configured *not* to automatically refresh the Employee Status View screen, you can overwrite this setting by checking **Automatically refresh this page** at the top of the Status View list.

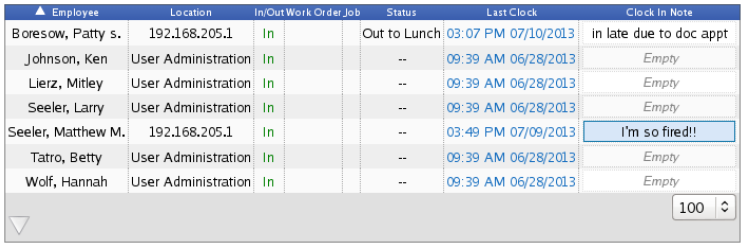
NOTE: When the automatic refresh option is activated, the Employee Status View screen will not refresh while you are making changes. It will refresh after one minute of inactivity.

Clock In Note

- When clocking in or out, a comment can be entered to accompany it. The clock in comment then appears on the Employee Status page as the **Clock In Note**.



- Employees can view but not edit **Clock In Note**s.



Employee	Location	In/Out	Work Order	Job	Status	Last Clock	Clock In Note
Boresow, Patty s.	192.168.205.1	In			Out to Lunch	03:07 PM 07/10/2013	in late due to doc appt
Johnson, Ken	User Administration	In			--	09:39 AM 06/28/2013	*Empty*
Lierz, Mitley	User Administration	In			--	09:39 AM 06/28/2013	*Empty*
Seeler, Larry	User Administration	In			--	09:39 AM 06/28/2013	*Empty*
Seeler, Matthew M.	192.168.205.1	In			--	03:49 PM 07/09/2013	I'm so fired!!
Tatro, Betty	User Administration	In			--	09:39 AM 06/28/2013	*Empty*
Wolf, Hannah	User Administration	In			--	09:39 AM 06/28/2013	*Empty*

100

- Administrators with permission to edit Clock Events, can add and edit **Clock In Note**s for either all employees or just the ones they manage. This can be done from the Employee Status View screen and by editing the event in the employee's Time Edit/Report.

NOTE: See a break down of permission defaults for the different admin levels.

- To add or edit, simply click on the "Empty" box or on an existing comment. Type the new message and hit Tab. The box will be blue while editing and will turn white once it's saved.

- Once a clock note is entered, it can be edited only until the employee clocks again. After the employee clocks again, the clock note is "locked" from future edit and is cleared from the Employee Status View screen.

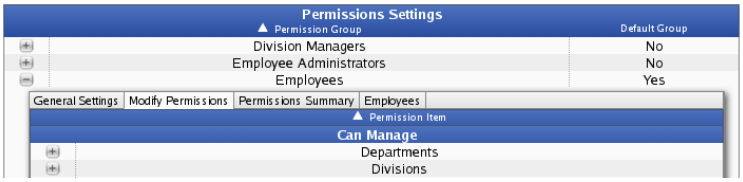
See Also:
Adding / Removing a Status Message
Using Global Status Messages
Employee Status View

Adding/Removing a Status Message

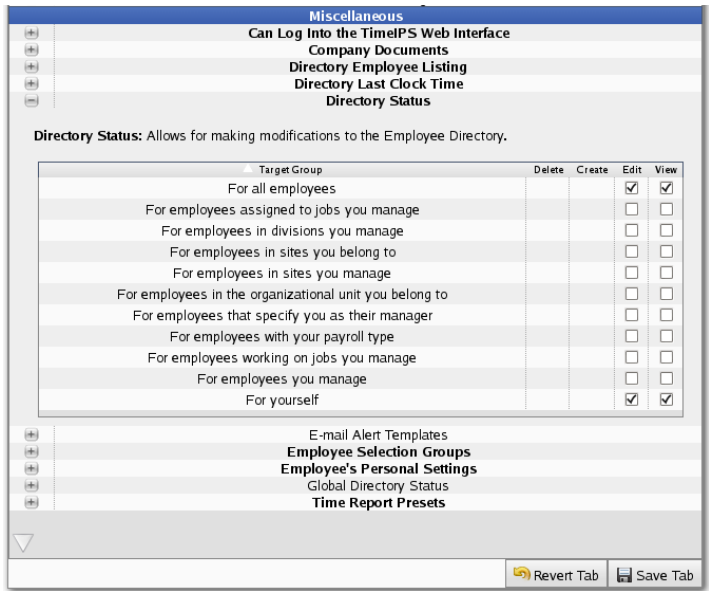
By default, employees are able to view and edit their own Status message, as well as view other's status message. In order for employees to set the status message for other employees, Directory Status permissions must be set by a System Administrator.

Using the left pane Main Menu » Administration, click on: Employees » Permissions

- Under Permission Settings, click the **+** (plus) sign to the far left of **Employees**. Click on the **Modify Permissions** tab.

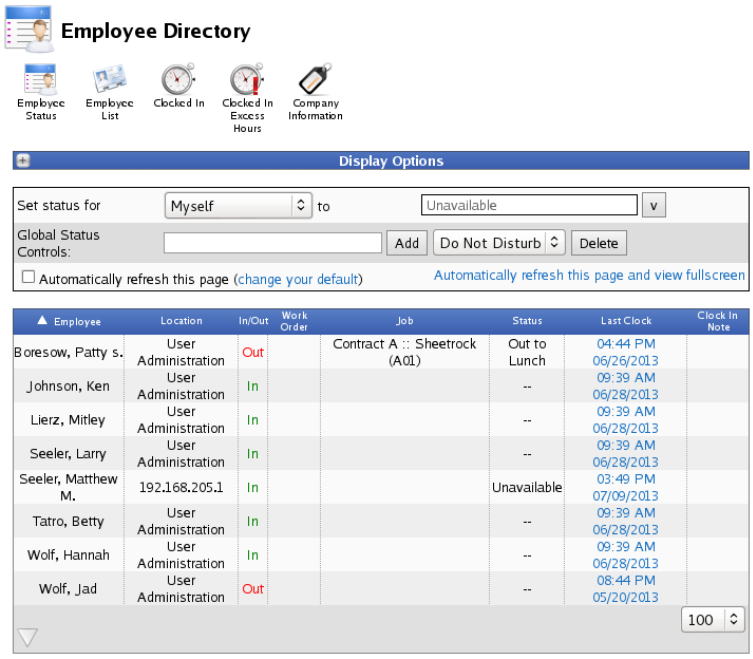


- Then under **Miscellaneous**, click on the **+** (plus) sign to the far left of **Directory Status** to expand that section. Check the **Edit** box next to **For all employees** to allow all employees to edit all statuses.

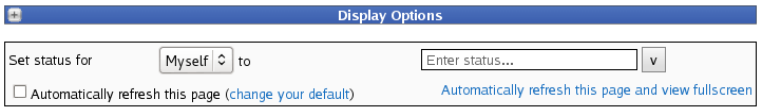


- Once your changes are made, be sure to click on **Save Tab**.
- Now head over to the Directory to view and edit status messages.

Using the left pane Main Menu, click on: Directory



Using a Default Status Message:



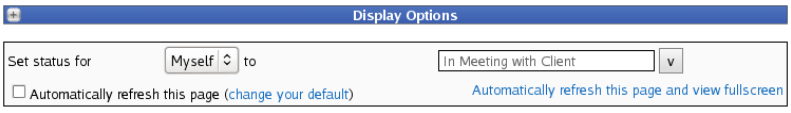
1. Click on the drop-down button next to **Set status for** to choose the employee name.

2. Click on the **V** button next to "Enter Status..." to choose from the default status messages.

- Do Not Disturb
- In Meeting
- On Vacation
- Out to Lunch
- Unavailable

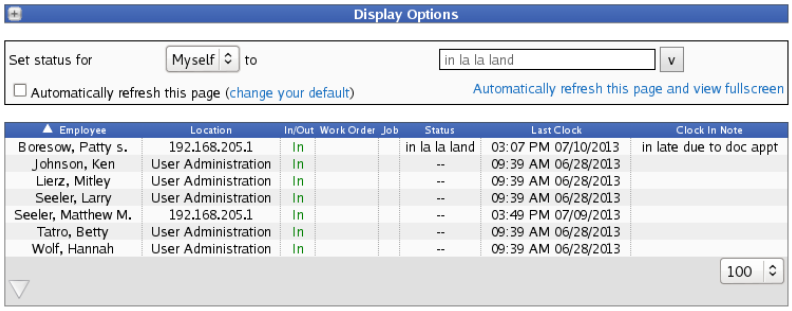
Adding a Custom Status Message:

- You can easily customize your status message by:
  a. Adding text before or after the default status messages.



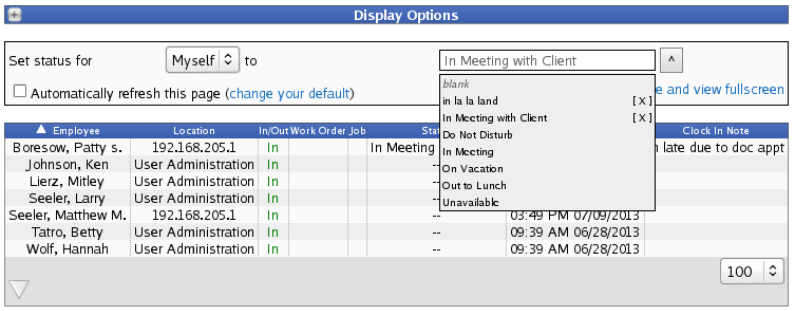
NOTE: In the image shown above, employee Patty added "with Client" after the default "In Meeting" status message. This message will remain on the Employee Status View screen unless or until Patty, her manager, or someone else with permission to, changes it.

  b. Typing in your custom status message.



- Custom status messages are saved for each employee and can be re-used at any time.

Removing a Custom Status Message:



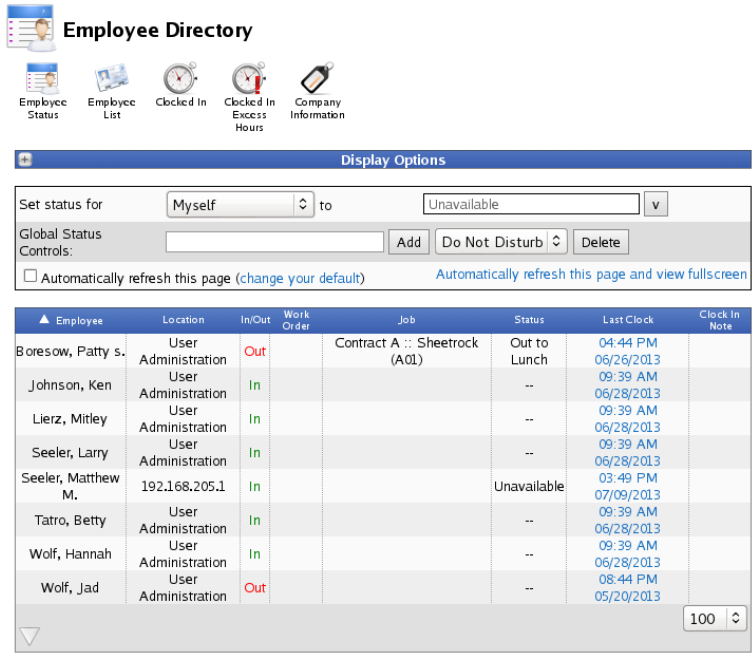
- To delete a custom status message from the list, click on the **[X]** next to the status message you wish to remove.

NOTE: Payroll Administrators can also add, change or remove status messages from the default list by using Global Status Controls since they have Global Directory Status permissions. Those with these permissions can also apply them to other employees/admins.

See Also:
Employee Status View
Adding/Removing a Status Message
Using Global Status Messages

Using Global Status Messages

Using the left pane Main Menu, click on: Directory

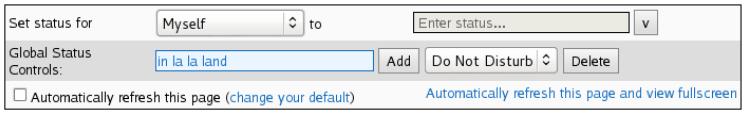


- This brings you directly to the Employee Status page.

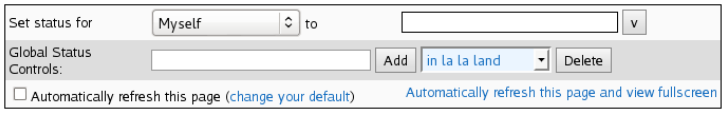
Using Global Controls to Add, Change, or Delete the Default Status Messages:

Users with Global Directory Status permissions (Such as Payroll Administrators) can add, change, or delete the default status messages using global controls.

Default status messages are made available to all employees. Additions, removals and changes made to this list are global.



- To add a new status message to the default list, click in the box next to **Global Status Controls**, type your new status message, and click on the **Add** button. The new status message will be added to the default list for all employees.



- To delete an existing status message from the default list, click on the drop-down box, select the status message you want to remove and click on the **Delete** button.

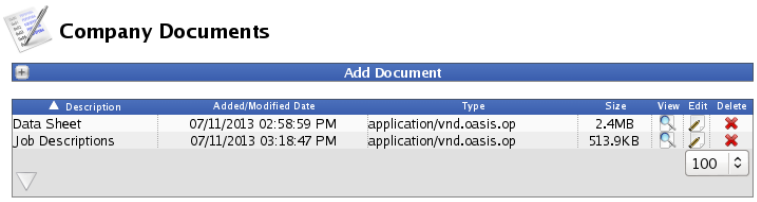
NOTE: To enter a custom status message for a single employee, see the article on Adding/Removing Status Messages.

See Also:
Employee Status View
Adding / Removing a Status Message
Using Global Status Messages

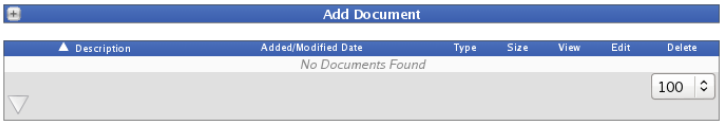
Company Documents

TimeIPS can store company documents for employee access. Users with "Company Documents" permissions can create, edit, and remove company documents. Employees have view only access.

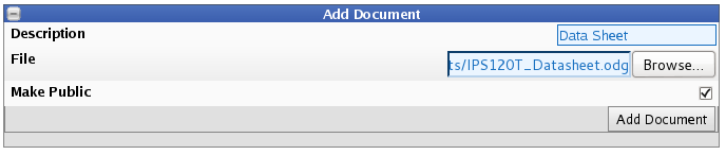
Using the left pane Main Menu, click on: Company Documents



To Add a Company Document



1. Click on the **+** (plus) sign in the top-left corner of the **Add Documtment** bar.
2. Enter the **Description.**
3. Next to "File", click on the **Browse** button and navigate to the location of the document.



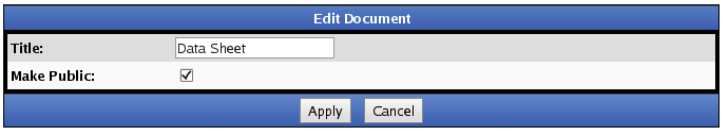
4. Check the **Make Public** checkbox if all employees with Login Access should be able to view the document.
5. Click on the **Add Document** button to upload the document.

To View a Company Document

1. To **View**, click on the magnifying glass icon .
2. The document opens based on the document's file format.

To Edit a Company Document

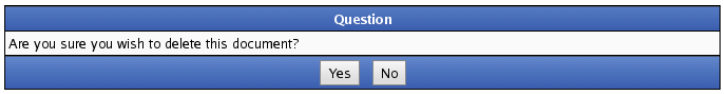
1. To **Edit**, click on the pencil and paper icon .
2. The Edit Document window displays.



3. Adjust the information as necessary.
4. Click on the **Apply** button to save the changes or the **Cancel** button to leave the page without applying the adjustments.

To Remove a Company Document.

1. To **Delete,** click on the red X icon .
2. A confirmation page displays.



3. Click on **Yes** to remove the document or **No** to leave the page without removing the document.

General Help

When navigating the TimeIPS administration screens, you will find an array of resources to help you with each function. There are three basic types of help resources available.

Level One: The Help button

The Help button is part of the TimeIPS web interface navigation. It is located in the top right hand corner of each page.

You can choose to:

- **Hide Help**
- Show **General Help**
- Show **Specific Help**
- Show **All Help**

- **General Help** typically appears at the top of a page inside a light blue box. It can be identified by its **i** (info) icon .

- **Specific Help** appears inline near each of the functions. Shown in the example below, it appears in the gray sections under each bold title.

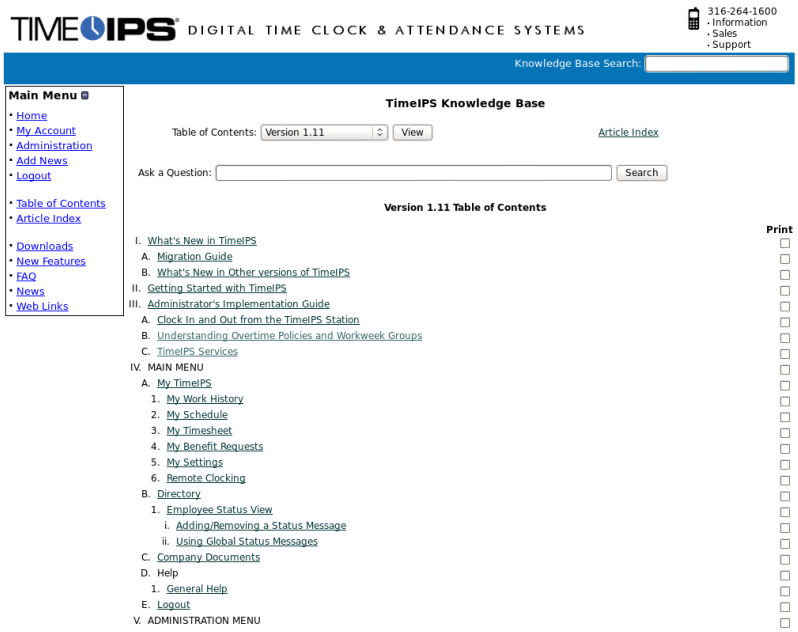
NOTE: By default, the help panels are visible and can be hidden by using the previously mentioned Help button or you can change the default under My Settings.

Using the left pane Main Menu » My TimeIPS, click on: My Settings.

- This takes you to the **General** settings page shown in the image above.
- Set your preference under **Show Help by Default** and select **Submit** to save.

Level Two: support.timeips.com

The TimeIPS Support Portal is an on-line support and information center.



The TimeIPS Support Portal includes the following helpful tools:

- The **Getting Started** article provides information and links to step-by-step instructions regarding setting up and using your TimeIPS system.
- The **What's New** article includes information about the many new features and enhancements to recent TimeIPS releases.
- Use the **Knowledge Base Search** at the top right and the Knowledge Base will return a listing of the most relevant articles.

TIPS on Searching: Search for help by entering keywords related to your issue. For example, if you want more information on running payroll, try typing "How do I run payroll?"

- In addition, you can find the following navigation tools under the **Main Menu** at the top left:
  - The **Table of Contents** provides a list of articles organized in the same manner as the TimeIPS Main Menu.
  - The **Article Index** provides a list of articles by article title.
  - The **Downloads** section contains programs, tools and examples that we recommend for use with your TimeIPS system.
  - The **New Features** section contains a search tool used to view and compare the features added in different versions of TimeIPS. Additionally, you may also select a category to only see related features.
  - The **FAQ** section includes general questions and answers regarding the Support Portal and getting help with TimeIPS.
  - The **News** section includes news articles regarding coming features and products and news relevant to TimeIPS customers.

- The **Web Links** section contains links to other sites that may be helpful to TimeIPS users.

Level Three: TimeIPS Technical Support

The TimeIPS Technical Support department is available Monday - Friday, from 8:00 AM - 5:00 PM CT at 877.846.3256 option 2 and by email at support@timeips.com.

Our professionally trained support team can assist you in setting up your TimeIPS system as well as answer questions reguarding its tools and features.

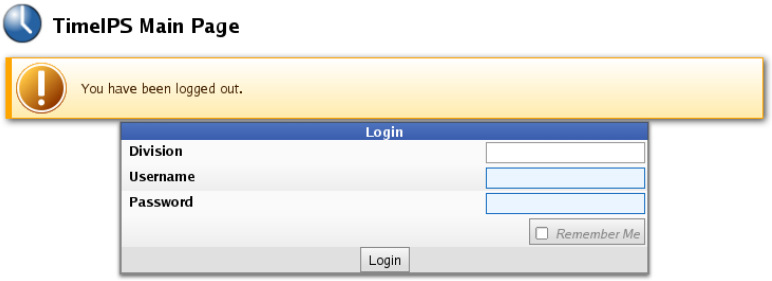
The support number is also listed in your TimeIPS system's administrative pages. The automated phone system will prompt you to enter either your Registration or your Serial Number. Both can be found in the page footer of your TimeIPS administrative pages. Enter the * key in place of the dash or any letters.

Logging Out of TimeIPS

To manually log out of TimeIPS web interface

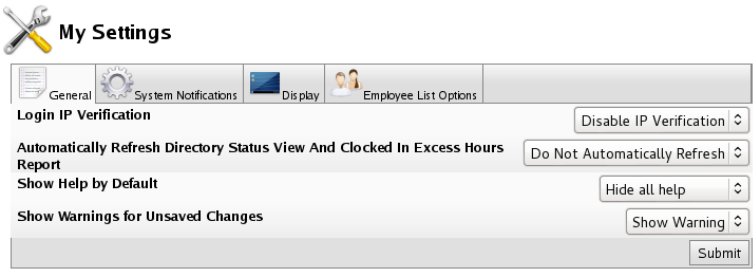
Use the left pane Main Menu, click on: Logout.

- This brings you back to the TimeIPS Main Login Page and confirms you have been logged out.



Continually being logged out of TimeIPS

- IP Verification is set to Enabled by default. This means, if you are logged in at the first computer and log in at a second computer, you will automatically be logged out of the first computer.
- The setting to disable IP Verification is found under My TimeIPS » My Settings



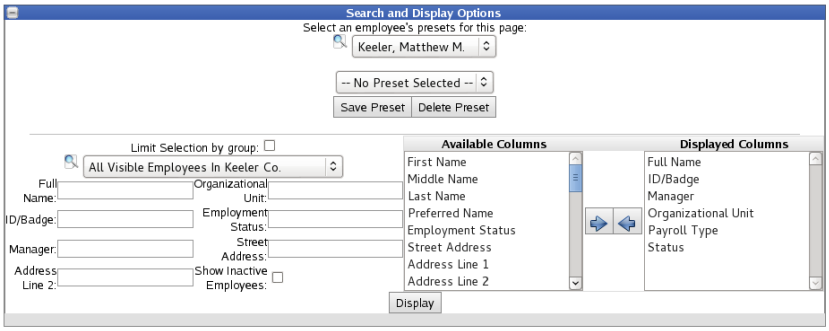
NOTE: The current system settings will automatically log you out after approximately 24 minutes of inactivity. This setting cannot be changed.

Tabbed Employee Administration View

Employee Administration stores information on each of your employees, including their login username/password, ID/badge number, and current employment status.

Using the left pane Main Menu, click on: Employees » Employees.

Search and Display Options

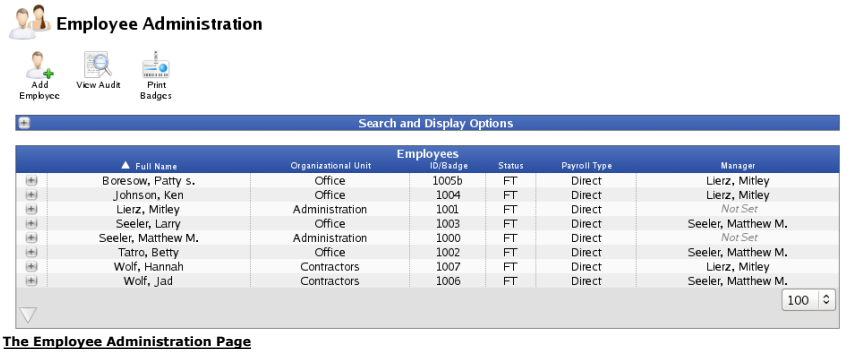


- Click on the + (plus) sign in the upper left corner of the **Search and Display Options** bar.
- Here you can filter which employees and which fields show in the **Employees** table below.

- On the left, there are a series of search boxes.
- On the right, there is a list of **Available Columns** and a list of **Displayed Columns**.
  - Move items from the Available Columns window to the Displayed Columns window by clicking on the desired field to highlight it, then clicking on the blue right arrow to move it. You can also just simply double click the item you wish to move.
  - Move unwanted items from the Displayed Columns list by clicking on the field to highlight it, then clicking on the blue left arrow to remove it. Again, you can also just simply double click the item you wish to move.

TIP: You can select multiple items to move by holding down the CTRL key while clicking on the individual fields. All the selected fields will be highlighted.

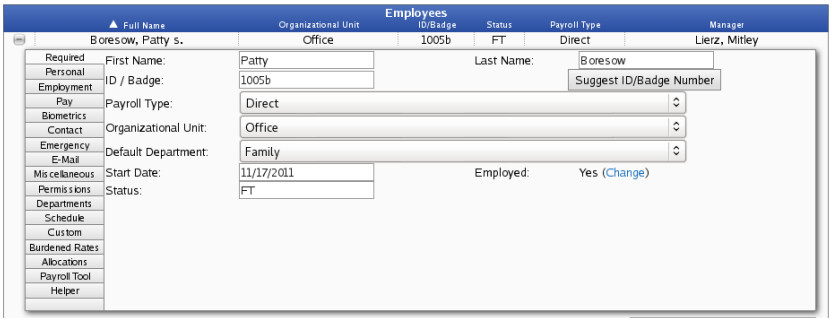
- Once you have selected your desired fields, click on the **Display** button to view your selections.
- To quickly bring up this same filter in the future, click **Save Preset**. Enter a name for it, then choose who can use this preset: personal, division, or global.
- To save this as the default, click the **Make Default** button while the preset is selected.



The Employee Administration Page

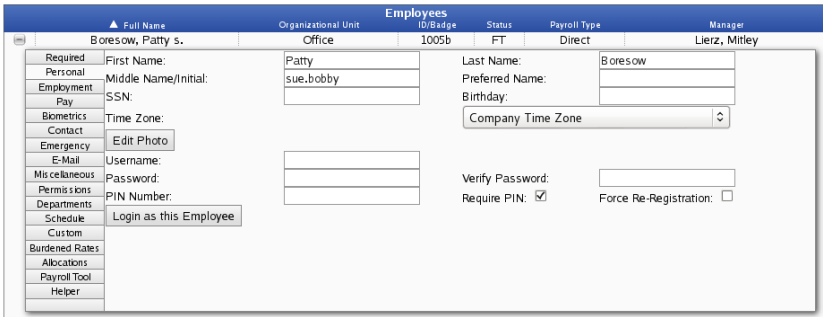
- Click on the + (plus) sign to the left of the employee's name to view/edit details.
- Click on the column header (Full Name, Organizational Unit, etc) to sort the table by the selected column values.
- Click on a column value (such as an Employee's Name, ID/Badge number, etc) to quickly access that detailed information for the employee.
- Employee Information can be imported from and exported to a spreadsheet program using the Employee Import/Export optional module.

Required tab



- All employee information required to start using the TimeIPS system is conveniently displayed in the Required Information tab.

Personal tab

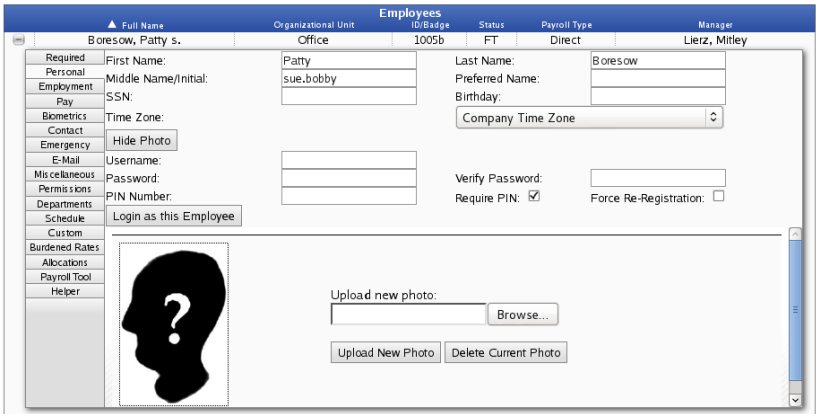


- How names are viewed in the TimeIPS web pages is defined in Administration » System » Company/Divisions » Division Settings. How names are viewed on the small display when employees clock in and out is defined in Administration » Clocking » Clock Configuration.
- The **Username** and **Password** fields are not required for the employee to clock in or clock out from a TimeIPS time station. They are required for employees to view or edit information in TimeIPS or to clock in/out from a computer terminal (Remote Clocking).
- Employee Social Security Numbers (**SSN**) can only be viewed by a payroll administrator.
- Check **Require PIN** if the employee is required to enter an employee-defined Personal Identification number when Telephone Clocking. Check **Force Re-registration** to require the employee to define a new Personal Identification Number on his next clock in/out using Telephone Clocking. **Validate PIN numbers for employees with 'Require PIN' is set** must be selected under Telephone Clocking.

NOTE: If using web based clocking from a computer terminal, a username and password must be defined on the employee's Personal Information tab.

To Add a Photo

1. Click on **Edit Photo**. The employee's Personal tab will expand as shown below.



2. Click on the **Browse** button and navigate to the folder containing the employee's photo.

TIP: Employee photos can be taken with a regular digital camera and then saved to your computer or loaded directly from the camera's memory card.

NOTE: Employee photographs must be saved in .png or .jpg format for use with TimeIPS barcode ID badges. Images over 180 x 180 pixels will be scaled to fit the ID badge.

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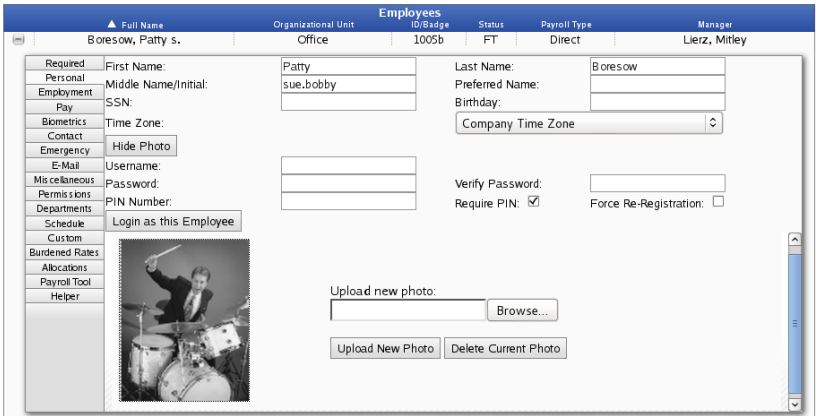
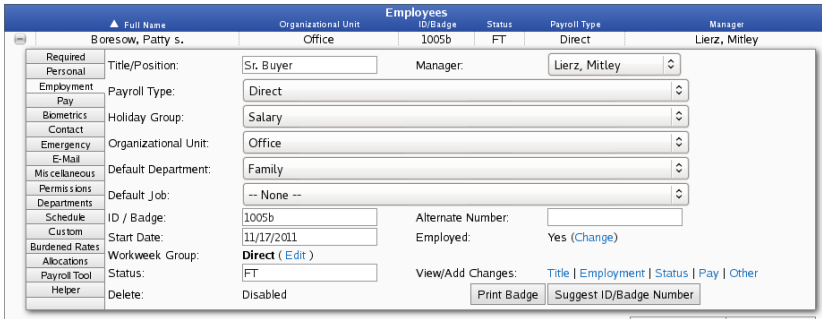
3. Select the employee's photo and click on **Upload New Photo**.
4. The employee's photo will appear.



TIP: To hide the employee's photo section, click on the "Hide Photo" button.

NOTE: To delete an employee's photo, click on the "Delete Current Photo" button.

Employment tab

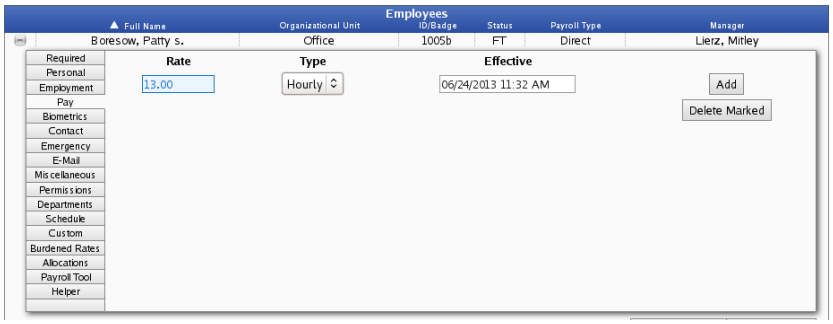


- (Optional) Enter the employee's title in the **Title/Position** field.
- All employees with the **Manager** Administrative Privilege are listed in the **Manager** drop-down menu. Select the employee's manager from the list.

TIP: When initially adding employees, add your manager's first and mark them as such in the Administrative tab.

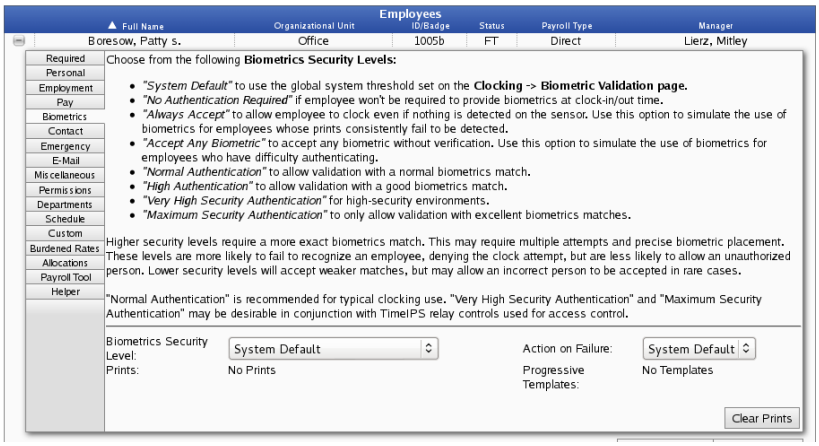
- TimeIPS uses **Payroll Types** to group employees with the same payroll period and Holiday qualifications. Payroll is run once for each Payroll Type. Time Reports and Special Reports may be run per Payroll Type.
- **Holiday Groups** are used to assign employees different sets of holiday rules.
- TimeIPS uses **Organizational Units** to designate employee groups in the Directory and on the Currently In Employees Status View. The employee's Organizational Unit is included on most exported reports for sorting purposes.
- If departments have been set-up, employees can be assigned a **Default Department**. Whenever the employee clocks in without specifying a department, they will automatically be clocked into the department selected here. (The IPSIPS optional module is required for Job Management.) The employee's default department will also be automatically selected when Group Clocking or inserting events in the Time Edit/Report.
- If jobs have been set-up, employees can be assigned a **Default Job**. Whenever the employee clocks in without specifying a job, they will automatically be clocked into the job selected here. (The IPSIPS optional module is required for Job Management.) The employee's default job will also be automatically selected when Group Clocking or inserting events in the Time Edit/Report.
- The **Employee ID/Badge Number** is 1-64 alphanumeric characters. The employee will either key this number into the key pad or swipe, scan, or touch the corresponding badge/device through a reader to clock in and out.
- The **Alternate Number** is an optional employee tracking number that is included on reports and payroll exports. Enter the Volt or ADP employee identification number if using either of those Payroll Exports.
- TimeIPS uses the **Start Date** to determine benefit accruals and Holiday waiting periods when using the Accruals feature. See Quick Books Integration with Benefits Tracking optional module for more information.
- "Yes" in the **Employed** field indicates that the employee is currently employed by the company. When an employee is terminated, select "No" and indicate whether they are available for rehire or not.
- Click "Edit" next to **Workweek Group** to bring up the workweek group configuration page.
- The employee's Manager, Employee Administrators and Payroll Administrators can **View Changes** that have been made to the employee's Title, Employment, and Status by clicking on the appropriate link. The employee's Manager and Payroll Administrators can **View Changes** that have been made to the employee's pay rate by clicking on the Pay link.
- You can print an individual employee's barcode badge by clicking on the "Print Badge" button.
- If needed, use the **Suggest ID/Badge Number** button to create a new badge number for the employee.

Pay tab



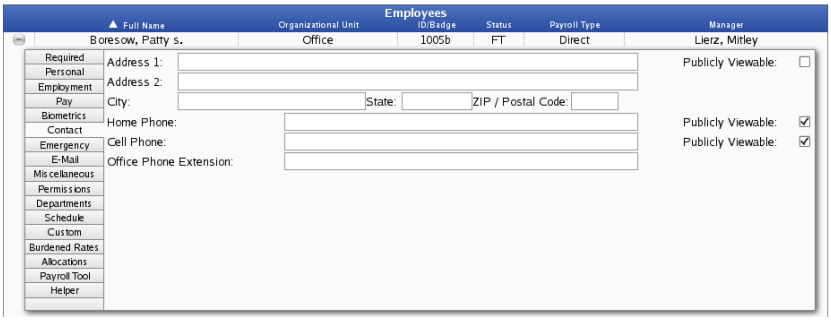
- To enter an employee's **Pay Rate**, click on the "Pay" tab.
- Enter the employees **Rate**, select whether the pay **Type** is Hourly or Salary and enter the date and time this rate becomes **Effective**.
- Click on the **Add** button to add the employee's pay rate.

Biometrics tab



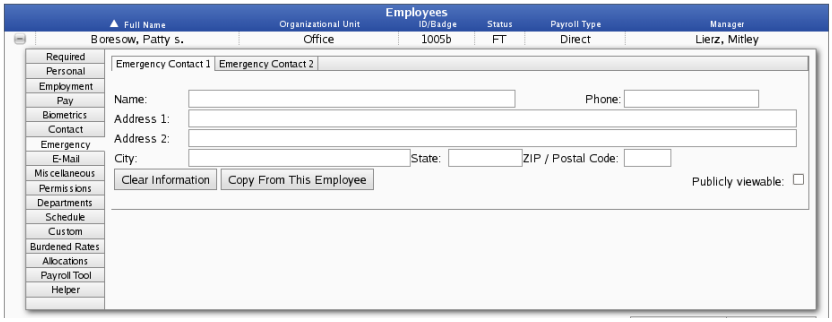
- To set an employee's **Biometric Security Level**, click on the "Biometrics" tab.

Contact tab



- Phone number(s) display in the Employee Directory if **Publicly Viewable** is marked as "Yes".

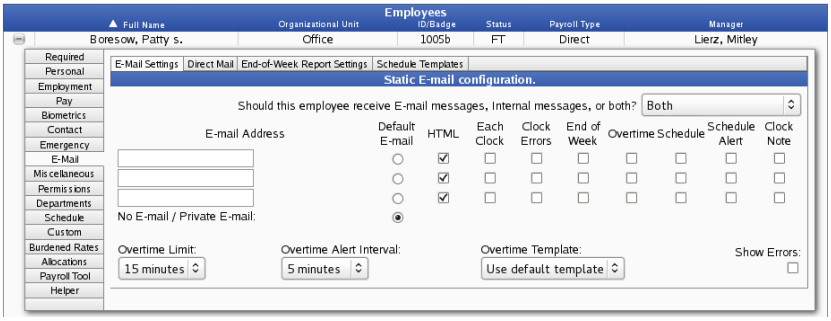
Emergency tab



- Click on the Contact #2 tab to enter an additional emergency contact.
- Check **Publicly Viewable** if the emergency contact information should be viewable by others.

Email tab

Email Settings

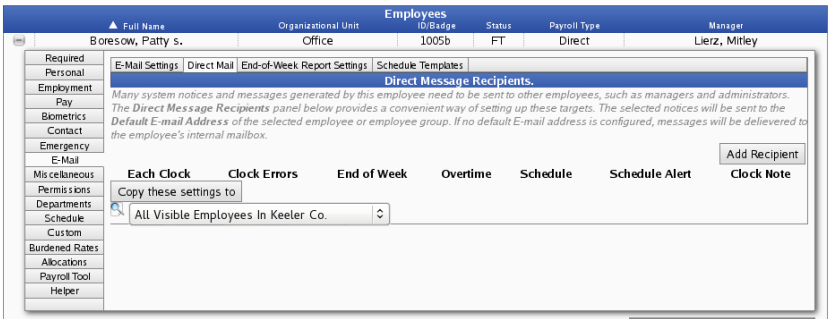


- Mark the employee's email address as the **Default E-mail** and it will display in the Company Directory. Mark **No E-mail/Private E-mail** radio button if the employee's e-mail address is not entered or if you do not want the employee's e-mail address to display in the Employee Directory.
- Check the **HTML** checkbox to generate End of Week reports in HTML, or leave the checkbox unchecked to generate a text version of the End of Week report.
- Check the **Each Clock** checkbox to e-mail a notification to the corresponding e-mail address each time the employee clocks in or out
- Check the **Clock Errors** checkbox to e-mail a notification to the corresponding e-mail address of every clock event error. A Clock Error occurs when an employee clocks in then back out, or vice versa, within 60 seconds.
- Check the **End of Week** checkbox to e-mail the employee's weekly time report to the corresponding e-mail address.

NOTE: The End of Week report includes a detail of clocks and time worked, End of Week Benefit status, and Hours Worked This Pay Period.

- Check the **Overtime** checkbox to e-mail a notification to the corresponding address when the employee is approaching overtime based on their Scheduled Hours per Week and Overtime Limit.
  - The **Overtime Limit** is the number of minutes prior to overtime that Overtime alerts should be sent. The employee's Scheduled Hours per Week are defined in Administration » Payroll and Reports » Payroll Settings. The Payroll Integration with Benefits Tracking optional module is required to customize employee's work weeks and define custom overtime/doubletime rules. By default, employees go into overtime after 40 hours worked during the work week or 12 hours worked in a day.
  - The **Overtime Alert Interval** determines how often the overtime alert should be sent. The alerts will automatically stop when the employee either clocks out or goes into overtime.
- Check **Schedule Alert** to e-mail a notification to the corresponding address when the employee deviates from his/her set schedule. The employee's schedule is set on the Scheduling Information page. The IPSIPS optional module is required to enter an employee's weekly work schedule.
- Check the **Show Errors** checkbox if you would like the small LCD display to denote the clock event as a Schedule Error.

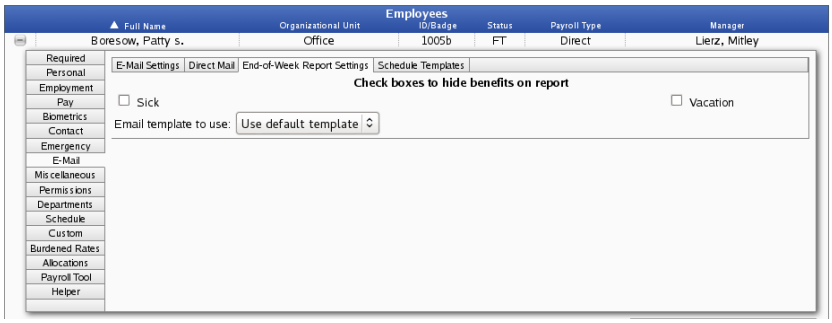
Direct Mail



- If there are more than 3 recipients needed, use the **Direct Mail** tab to add additional recipients.

TIP: Save time by choosing to "copy these settings to" other employees.

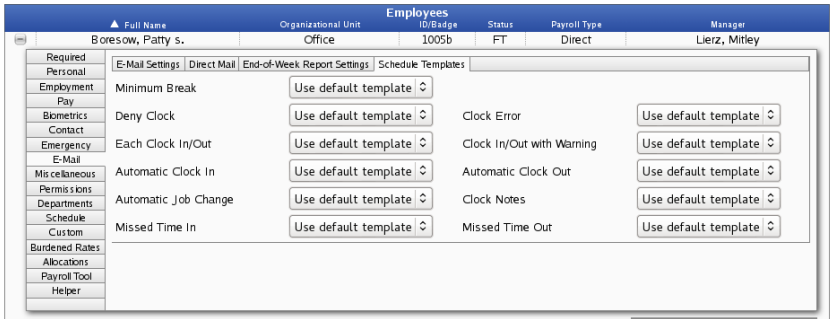
End-of-week Report Options



- (Optional) Check the applicable **check boxes to hide benefits on report** to exclude specific benefit details on the EOW report. This option can be set per employee.
- These checkboxes will be unchecked by default.

NOTE: If using the Advanced Benefits Module, any benefit types added are available to be selected.

Schedule Templates



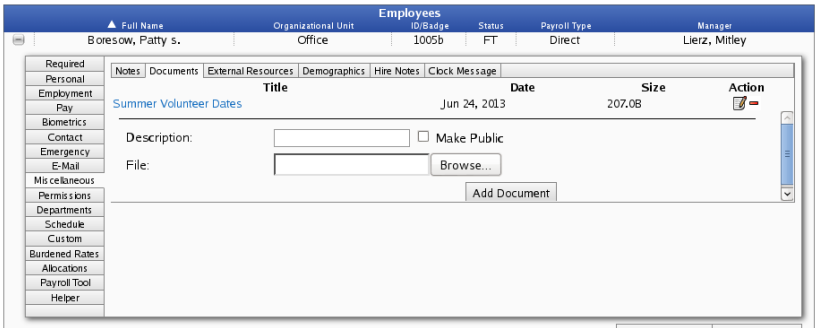
- If IPSEML is being used, customized emails can be sent in response to a variety of situtions.

Miscellaneous tab

Notes

- The "Equipment List", "Physical Keys", and "Alarm Access" fields are automatically audited.
- "Notes" will display in the Employee Directory ⇒ Employee Lists for all employees to view.

Documents

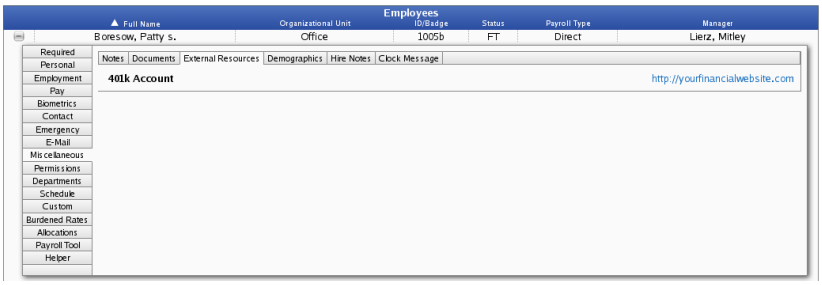


1. Click on the **Documents** tab to attach documents associated with the employee.
2. Click the **Browse** button and navigate to the document.
3. Enter identifying information about the document in the **Description** field and click on the **Add Document** button.
4. Check the box for **Make Public** if you would like the document to appear on the employee's Documents list in Classic View.

TIP: The documents section can be used to store employee-related documents such as job applications, W-2's, and contracts.

NOTE: Documents saved in this area can be included in your back-ups by choosing "System » Backups" and clicking on the "User Media Backup" option. Please note, however, that this may increase the file size of your back-ups significantly.

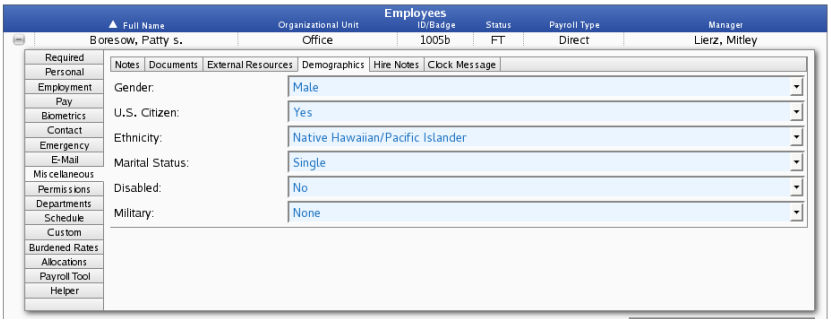
External Resources



- Click on the **External Resources** tab to view a list of resources available to the employee.

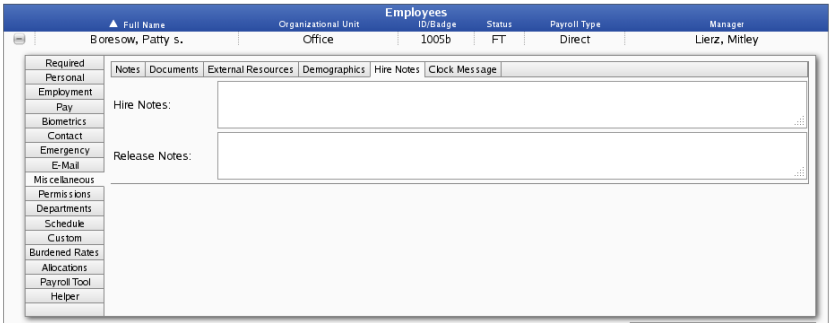
NOTE: This feature requires the IPSLNK module. For more information, go to the IPSLNK External Employee Resources page.

Demographics



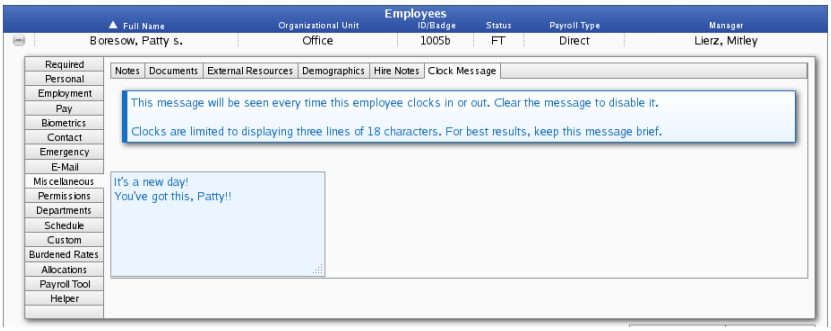
- Click on the **Demographics** tab to enter information regarding the employee's gender, U.S. citizenship, ethnicity, marital status, disability status, and military status.

Hire Notes



- Click on the **Hire Notes** tab to add relevant employee notes related to the employee's hiring and/or the employee's release.

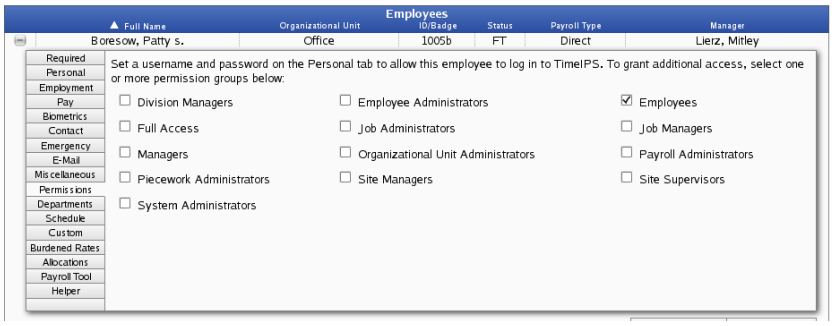
Clock Message



- Click on the **Clock Message** tab to save a message that will be seen every time this employee clocks in or out. Clear the message to disable it.

NOTE: Clocks are limited to displaying three lines of 18 characters. For best results, keep this message brief.

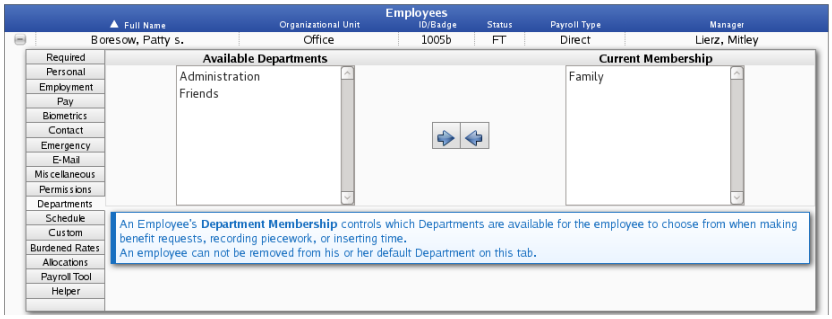
Permissions tab



- Click on the **Permissions** tab to assign the employee's TimeIPS permission level(s).
- Check the corresponding box for each permission group that needs to include the employee. The employee will receive the sum of all the permissions allocated by the permission groups selected.

NOTE: Go to the Permission article for a detailed description of what each permission level entails.

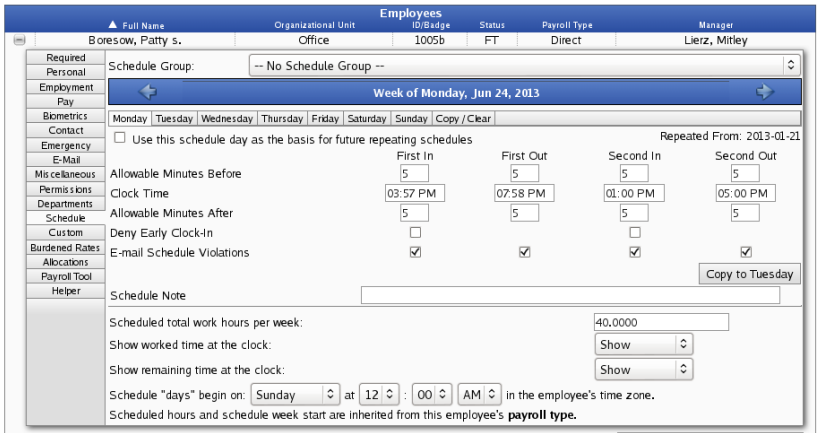
Departments tab



- The **Departments** tab allows you to select the employee's **Department Membership** which controls which Departments are available for the employee to choose from when making benefit requests, recording piecework, or inserting time.

NOTE: An employee can not be removed from his or her default Department on this tab.

Schedule tab

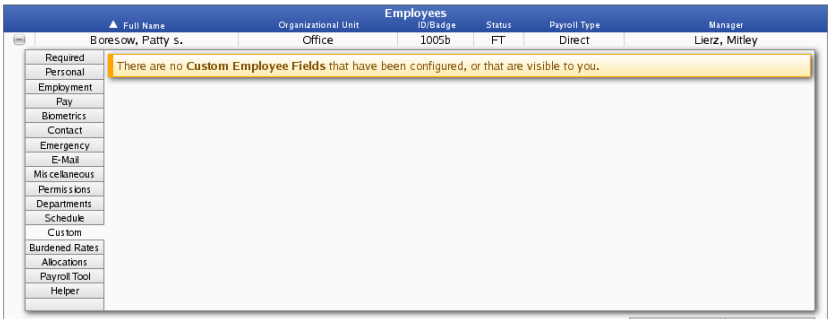


- The **Schedule** tab allows you to enter the employee's individual work schedule by day, including the total minutes allowed before or after the scheduled clock times.
- Select the employee's **Schedule Group** from the drop-down box.
- Checkmark **Deny Early Clock-In** to prevent the employee from clocking in or out of TimeIPS when they are outside of their schedule (includes the additional minutes before or after their scheduled clock times.)
- Checkmark **E-Mail Schedule Violations** to generate an e-mail notification when the employee clocks in or out of TimeIPS outside of their assigned schedule.

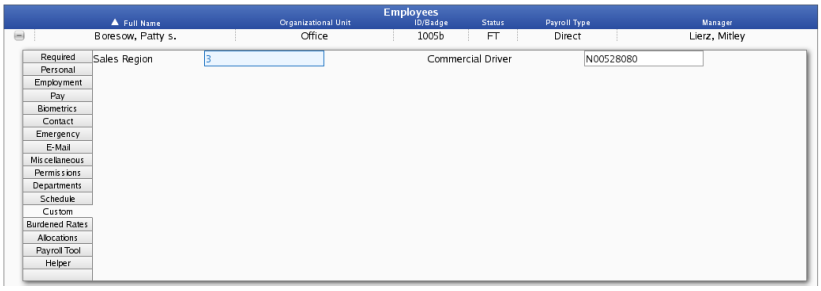
TIP: Click on the "Copy" tab above the daily In/Out times to quickly clear the schedule, load a standard 8-5 schedule, copy Monday to Tuesday-Friday, copy Monday to Tuesday-Sunday, copy a schedule forward to the next week, or to copy one employee's schedule to another's.

- The **Scheduled total work hours per week** that the employee is expected to work can be specified. If you would like the employee to see their hours worked or remaining time to be worked in a week, select "SHOW." When the employee clocks in or out at a network clock, telephone clock, or remote clocking, it can show the number of work hours remaining for the week.
- Employee's schedules must have a start time for the week. Select the **Begins on** day of week and time of day from the drop-down boxes. If an employee's day begins at a time other than midnight, you may want to have one or more of the schedule point fall on a different calendar day. For example, an employee's schedule begins at noon, their first in could be 8pm, first out could be 12am, second in could be 1am, second out could be 4am.

Custom Tab



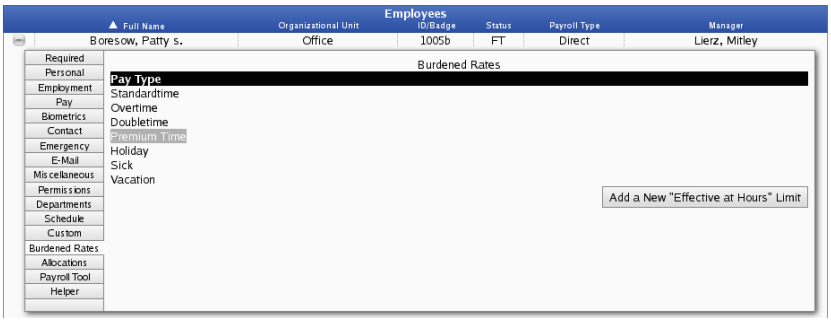
- The **Custom** tab will display the above message prior to creating custom fields.
- To create custom fields, go to the left hand navigation column: Administration >> Employees>> Custom Fields. Add a Field Key and Field Title, then press create.



- The **Custom** tab will now display those custom fields which can be filled in with the employee's corresponding information.

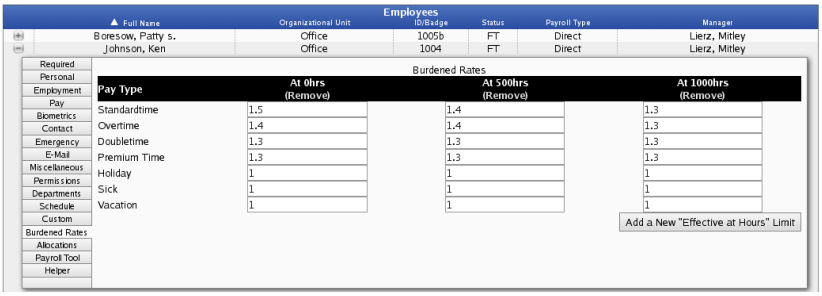
NOTE: This feature requires the IPSCDF module.

Burdened Rates tab



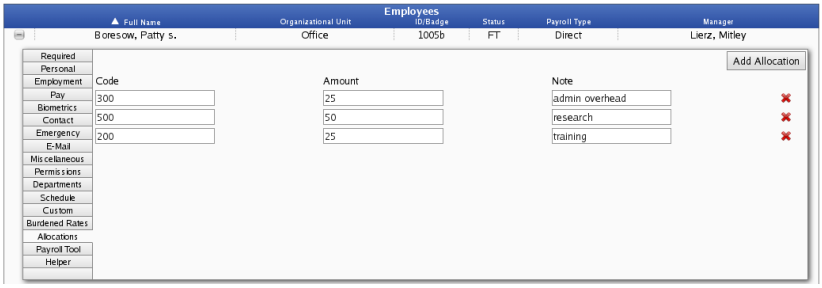
- The **Burdened Rates** tab allows you to track the the actual cost for employee's time in comparsion to the employee's wages. For example, an employee making $10 per hour actually costs the company $15 per hour based on company overhead, taxes, etc.
- Often used for employees from a PEO or Staffing Agency where a set markup applies. In addition, PEOs and Staffing Agencies often reduce the markup after a certain amount of hours have been worked. Click "Add a New Effective at Hours Limit" to add a new burderned rate level for an employee who has worked a larger number of hours.

NOTE: This feature requires the IPSBRD module.



- Here is an example of the Burdened Rates specified.

Allocations tab



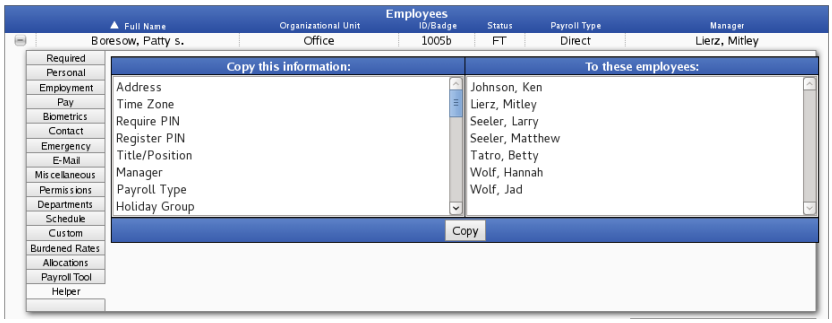
- The **Allocations** tab allows you to allocate the employee's time into categories.
- Allocations are commonly used for employees working in multiple locations and in conjuction with grants. Generally displayed on custom reports or custom payroll to show the proportion of time worked in different areas.

NOTE: This feature requires the IPSBRD module.

Payroll Tool tab

- The **Payroll Tool** tab allows you to see the payroll exports that included the employee.

Helper tab

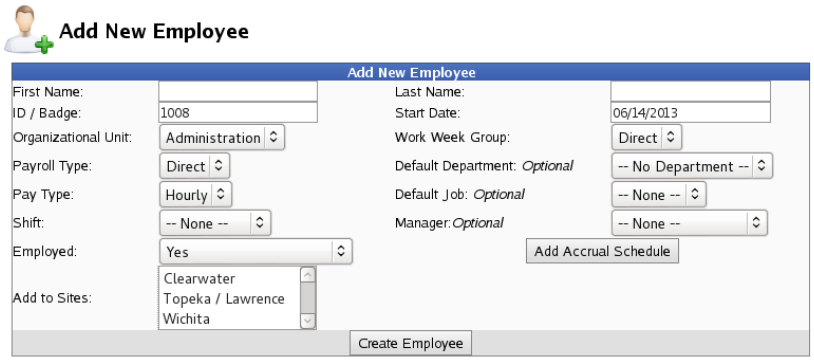


- The **Helper** tab allows you to copy information from one employee to another.

Add New Employee

Employee Administration stores information on each of your employees, including their login username/password, ID/badge number, and current employment status.

Using the left pane Main Menu, click on: Employees » Employees.



1. Click on the **Add New Employee** icon at the top of the page.
2. Enter the required information for the employee.
   - **First Name** and **Last Name** fields are used to identify the employee. You may enter middle name and preferred first name once the employee's record is created on the employee's Personal tab.

NOTE: The employee name format that will be used in the administrative sections of TimeIPS can be defined in Administration » System » Company/Divisions » Division Settings. The employee name format that will be used on the display when employees successfully clock can be defined in Administration » Clocking » Clock Configuration.

   - The Employee **ID/Badge Number** is 1-64 alphanumeric characters. The employee will either key this number into the key pad or swipe, scan, or touch the corresponding badge/device through a reader to clock in and out.
   - TimeIPS uses the **Start Date** to determine benefit accruals and Holiday waiting periods when using the Accruals feature. See Quick Books Integration with Benefits Tracking optional module for more information.
   - **Organizational Units** are an additional way to classify employees into groups that can be utilized when running reports.

- **Workweek Groups** allow administrators to manage sets of employees who follow the same workweek schedule and have their overtime calculation done in the same way.
- TimeIPS uses **Payroll Types** to group employees with the same payroll period and Holiday qualifications. Payroll is run once for each Payroll Type. Time Reports and Special Reports may be run per Payroll Type. Payroll Types are defined in Payroll Types section under Payroll and Reports.
- If any employee does not specify which department they are clocking into, they will be automatically assigned to the **Default Department**.
- The **Pay Type** indicates if the employee is "Salary" or "Hourly".
- If any employee does not specify which job they are clocking into, they will be automatically assigned to the **Default Job**.
- **Shifts** are a way to enter time worked in blocks for multiple employees and multiple days at a time.
- The employee's **Manager** can be selected here. This can be used in determining which employees' records that each Manager has access to.
- "Yes" in the **Employed** field indicates that the employee is currently employed by the company. When an employee is terminated, select "No" and indicate whether they are available for rehire or not.
- Select the **Add Accrual Schedule** to set the start date and group.
- The **Accrual Groups** provide a way to set the types and amount of benefits that will be accrued for employees.
- The **Accruals Begin** date is the day you want TimeIPS to begin calculating sick and vacation time. You will enter the employee's current available sick and vacation in the Benefits section or through the Benefits Import.

NOTE: If your company uses Site administration, Site Managers, managers of Site Managers, and Employee Administrators will see an extra option in the Add Employee window which provides them with the ability to assign the new employee to a site immediately upon creation of the employee record.

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3. Click on the **Create Employee** button to add the employee to the Employee table. The screen will refresh with the employee's information expanded.
4. Enter/Edit additional information as applicable for the employee. See the Tabbed Employee Administration article for instructions.

Tip: Employee Information can be imported from and exported to a spreadsheet program using the Employee Import/Export optional module.

Terminating/Rehiring Employees

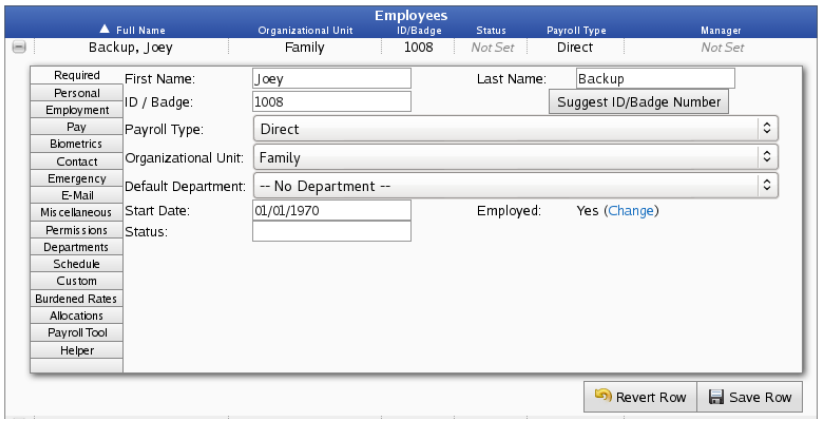
TimeIPS maintains employee records for both active and released employees. This article explains how to inactivate, reactive and delete employee records.

Using the left pane Main Menu » Administration, click on: Employees » Employees

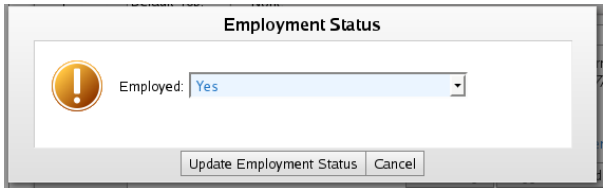
Terminating an Employee

TimeIPS stores employee's time and payroll information historically. You will mark terminated employees as no longer employed, rather than deleting their information completely from TimeIPS. You may delete employee records only if the employee does not have any time data and/or a payroll cycle has not passed.

1. Click on the **+** sign next to the name of the terminated employee to expand the record.



2. On the **Required** or **Employment** tab, click "change" to the right of the **Employed** status. (In this example, it reads "Yes".)

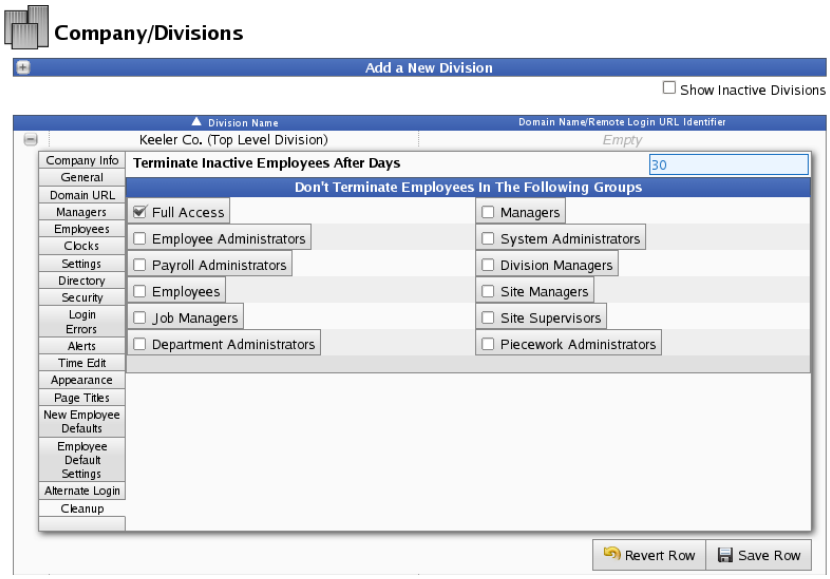


3. The **Employment Status** window pops up. From the drop-down, select "No, eligible for rehire", "No, not eligible for rehire", or "Automatically terminated for inactivity".
4. Click **Update Employment Status** to save. This will inactivate the employee record.

Set Automatic Termination

Using the left pane Main Menu » Administration, click on: System » Company/Divisions

- Click on the **+** (plus) sign to the left of your Company's Division.
- From the **Cleanup** tab, enter the number of days an employee should be automatically terminated after inactivity. Inactivity refers to no worked time, benefits, holidays, or piecework.
- If there are certain groups of employees that this does not apply to, check the box next to that group.
- Click **Save Row** to implement the changes.

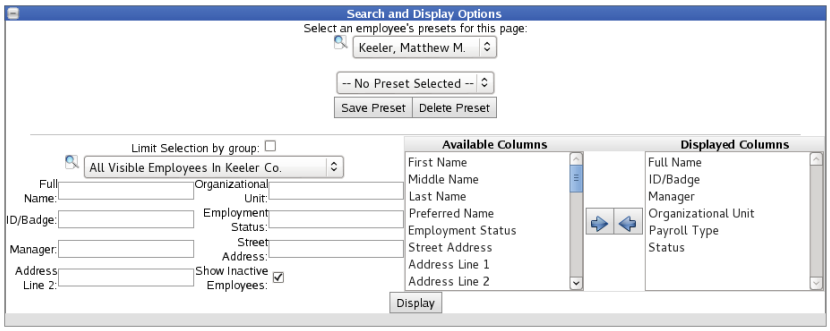


Rehiring an Employee

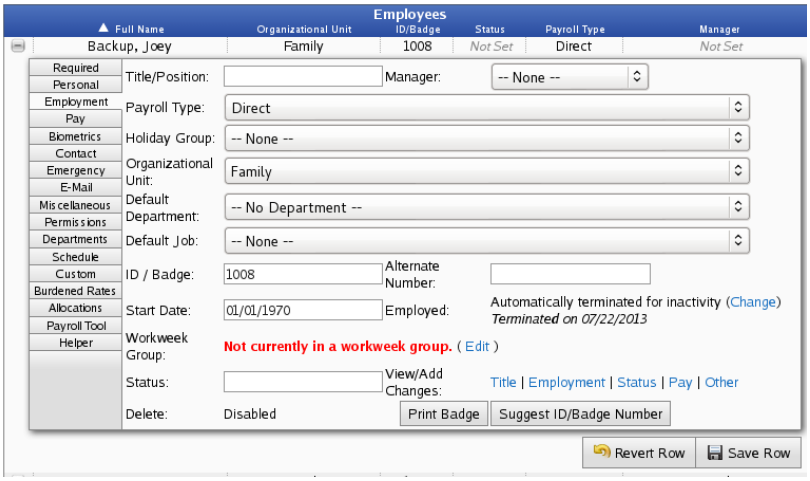
TimeIPS stores employee's time and payroll information historically. Once an employee's record has been marked as no longer employed, the record becomes inactive but can later be reactivated if the employee is rehired.

Back under the Main Menu » Administration, click on: Employees » Employees

1. Click on the **+** sign on the **Display Options** bar to expand the window.



2. Check the box next to **Show Inactive Employees**, then click on the **Display** button. Both active and inactive employees will display.
3. Click on the **+** sign next to the inactive employee's name to expand their record.



4. On the **Required** or **Employment** tab, click "change" to the right of the **Employed** status. (In this example, it says "Automatically terminated for inactivity".
5. The **Employment Status** window pops up. From the drop-down, select "Yes" to reactivate the employee's record.

NOTE: If the employee's original ID/Badge number has been reassigned to a different employee, you must assign a new ID/Badge number to the rehired employee before leaving this screen.

TIP: Use the "Suggest ID/Badge Number" to generate an unassigned badge number.

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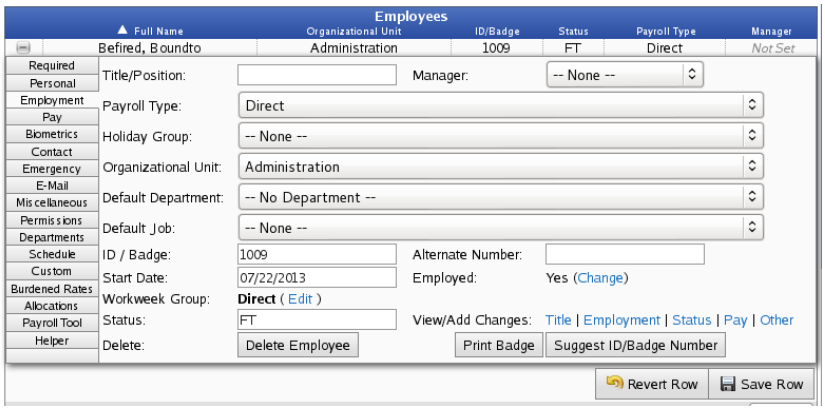
6. Click **Update Employment Status** to save the changes.

Deleting an Employee Record

TimeIPS stores employee's time and payroll information historically. An employee's record can only be deleted if the employee has never clocked in or out and/or a payroll cycle has not passed.

1. Click on the **+** sign next to the employee's name to expand the employee record.



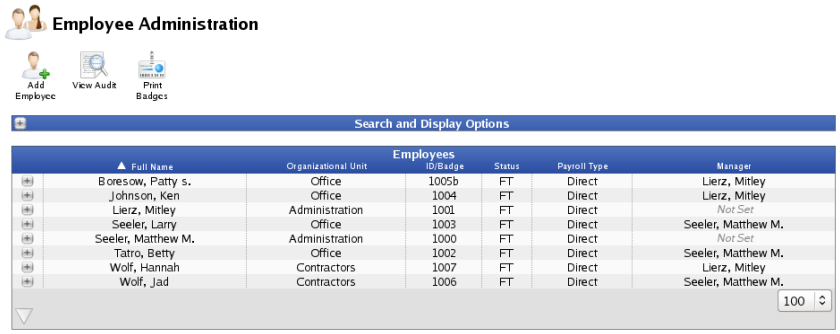
2. Click on the **Employment** tab.
3. Click on the **Delete Employee** button. TimeIPS will ask you to confirm the deletion. Click on OK. The employee record will be deleted.

The "Delete Employee" button will not appear if any time events are associated with the employee's record or if a payroll cycle has passed. Instead, it will show "Disabled".

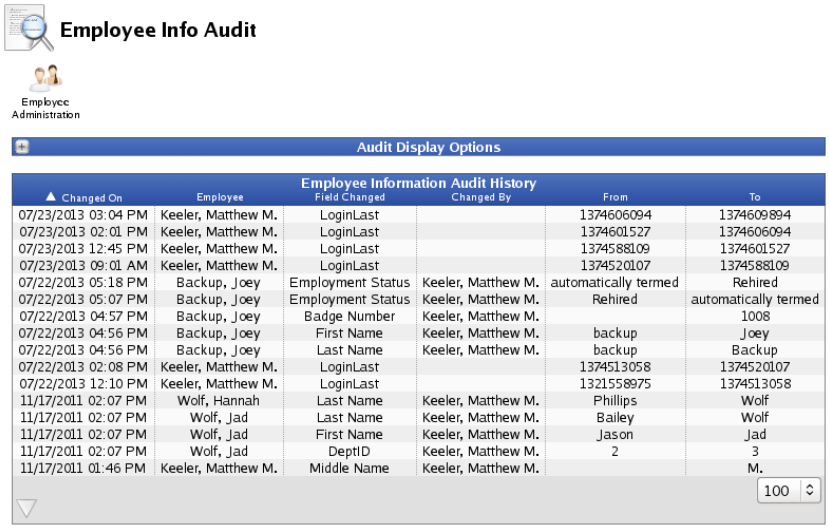
View Employee Information Audit

Employee Administration not only stores information on each of your employees (including their login username/password, ID/badge number, and current employment status), it also stores changes made to employee information.

Using the left pane Main Menu, click on: Employees » Employees.

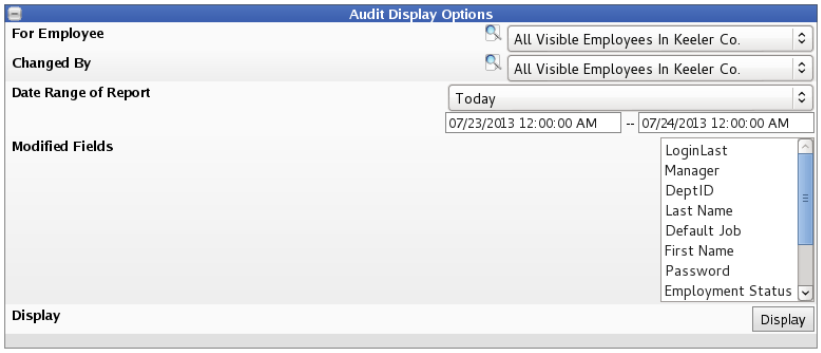


Click on the **View Audit** icon.



Audit Display Options

- Click on the + (plus) sign in the upper left corner of the **Audit Display Options** bar.
- Here you can filter which employees and which fields show in the **Employee Informatoin Audit History** table below.



- Once you've selected the desired filters, click the **Display** button.

Customize and Print Employee Barcode Badges

TimeIPS includes the ability to generate employee badges with barcodes. They can then be printed and laminated for employee identification and clocking purposes.

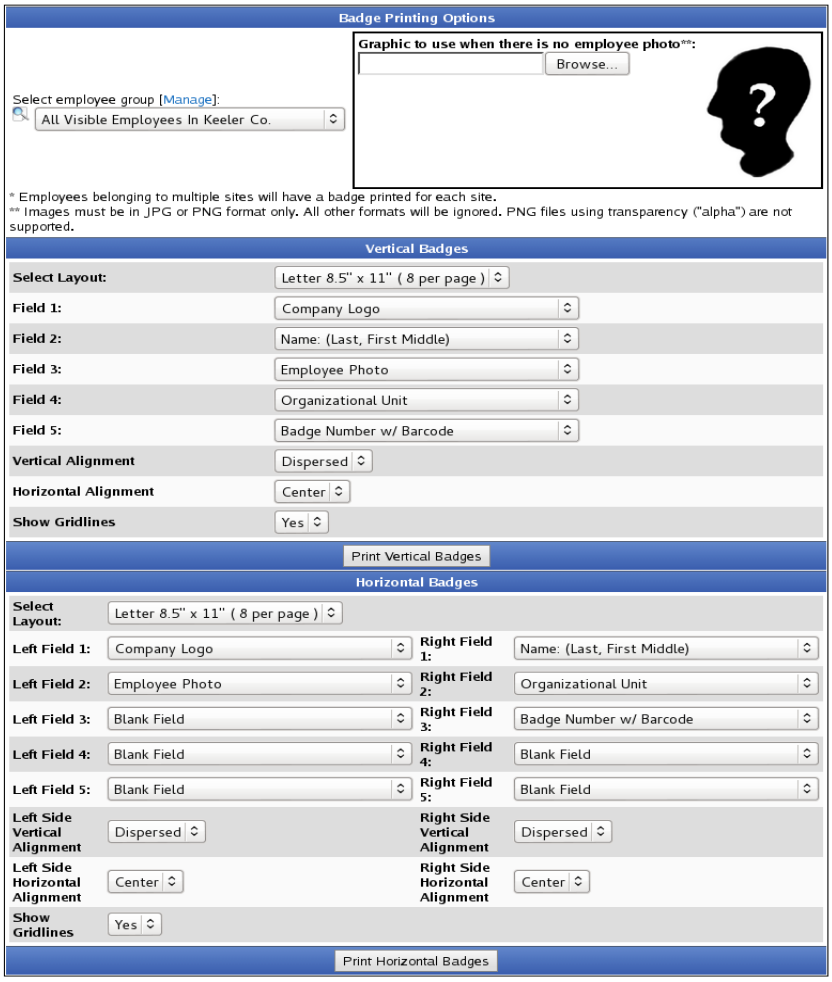
Customize Employee Badges

Using the left pane Main Menu, click on: Employees » Employees.

- Click on the **+** (plus) sign to the left of the employee's name. From the **Employment Tab**, click on **Print Badge**.
- OR... Click on the **Print Badges** Icon

to open the **Employee Custom Badge** window.

Employee Custom Badges



Custom badges can be created for individuals or groups of employees.

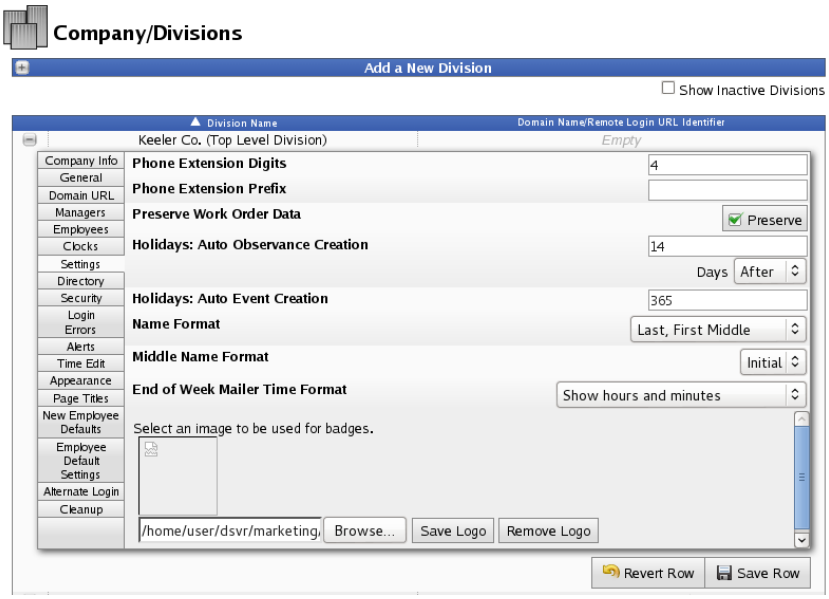
1. Select the employee or group of employees from the drop down menu in the top left corner.
2. Optional: Choose a **default image** to use if there is no Employee Photo on file.
3. Decide on either a **Vertical** (portrait) or **Horizontal** (landscape) format, then edit the fields on that section.
   - Choose a paper size (and how many badges per page) under **Select Layout**.
   - There can be up to five fields for a vertical badge and up to five fields per side of the horizongal badge.
   - To use fewer fields, set the unused fields' value to "Blank Field".
   - If the content is shorter than the height of the badge, then the **Vertical Alignment** can be specified.
   - Content can be **Horizontally Alligned** to the left, center, or right side of the badge or column of the badge.

Add Company Logo

Your Company logo can be uploaded to TimeIPS then printed on employee badges.

Under the left pane Main Menu » Administration, click on: System » Company/Divisions

- Click on the **+** (plus) sign to the left of your Company's Division.



- From the **Settings** tab, click on the **Browse** button at the bottom of the page.
- Navigate to your company logo file and click on the **Open** button.

NOTE: Only JPG or PNG image files can be uploaded. Large images will be scaled to fit the employee's badge. The suggested size for a company logo on a badge is a 5 x 1 ratio. The actual size of the file used in the example is 567 X 90.

- Click on the **Save Logo** button. The company logo will upload and display.

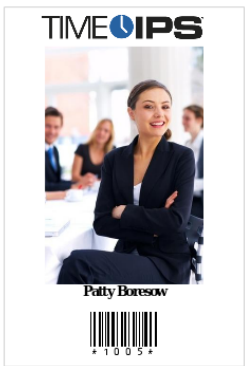
NOTE: To remove the logo and use the default TimeIPS logo, click on the Remove Logo button.

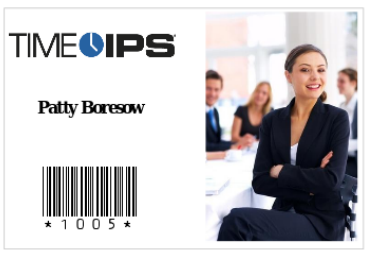
Add Employee Photo

See the "To Add a Photo" section of the Employee Administration article.

Print Employee Badges

4. When you are finished customizing, click the appropriate **Print Vertical Badges** or **Print Horizontal Badges** to generate a preview in Adobe Reader or other pdf reader.
5. If everything is correct, select to print.





NOTE: Employee badges can be printed on plain paper or card stock and then laminated. No special paper or printer is required.

TIP: TimeIPS barcode scanners read the font "Barcode 39 (3 of 9)" for employee IDs. You can use a third-party application to create custom employee ID badges with the Barcode 39 font. TimeIPS only supports printing barcodes for employee badges that are completely numeric. Note that most scanners do not support barcodes shorter than 5 digits.

Setting Up Employee ID Badge Numbers in Swipe Badge Systems

Keypad Systems

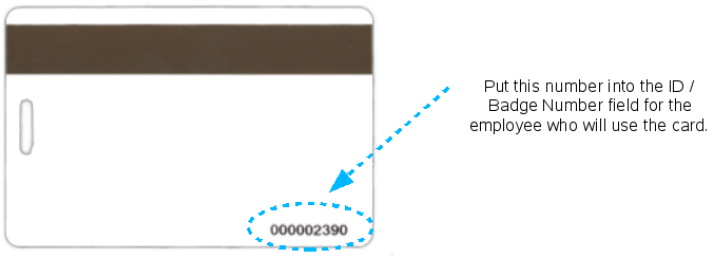
Prior to setting up any new employees, please consider if the default Employee ID Number of 100 (or 1000 on later versions of TimeIPS) assigned to the administrative employee is how you want to begin your Employee ID Number sequence. If not, please consider the following: Changing the administrative employee's ID number or setting up a new employee's Individual Employee ID number can be handled 2 different ways:

1. Accept the automatically assigned sequential ID / Badge Number that the system will give to each new employee.

2. Assign a unique number in the ID / Badge Number field as needed. If you want each employee to have their own custom number (such as their driver's license number or Social Security Number), you'll have to override the auto-generated employee ID number generated by the system on each employee.

Swipe Badge Systems

For swipe badge systems. we suggest using automatic sequence numbering. To do this, locate the swipe badge with the beginning (lowest) number on the back of the badge. Enter this number in the ID / Badge Number field for the administrative employee. The system will automatically generate the next highest sequential Badge Number for each new employee that is created to match their card.



Back Side of Swipe Badge

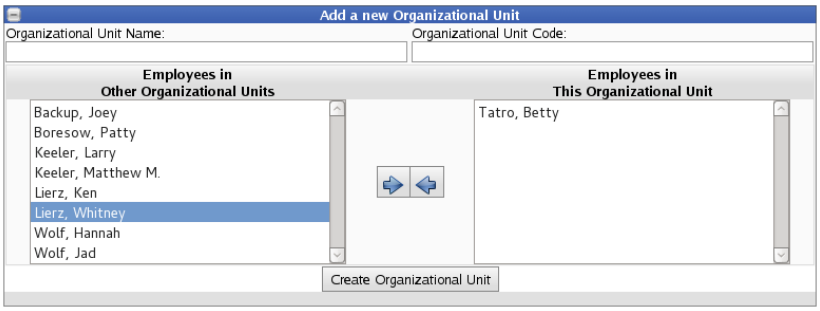
Organizational Unit Administration

If you have upgraded your TimeIPS System from a version older than 1.10, the system named "Departments" has been renamed to "Organizational Units". There is a new "Departments" system. This change was made after extensive customer feedback concerning the nomenclature of these systems and their intended use.

Note: Organizational Units are used to categorize employees. If you want to track time spent on one task versus another, you should use Departments or Jobs.

Using the left pane Main Menu » Administration, click on: Employees » Organizational Units

To Add a New Organizational Unit:

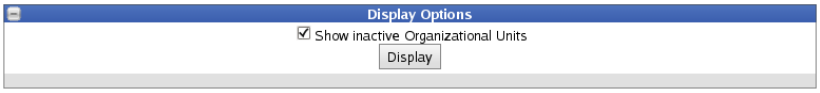


1. Click on the **+** (plus) sign in the far left corner of the **Add a New Organizational Unit** bar.
2. In the box directly below **Organizational Unit Name**, enter the unit's name.
3. In the box directly below **Organizational Unit Code**, enter the unit's code.

4. To move employees in or out of this unit, click on the employees name and use the blue arrows to move them from "Employees in Other Organizational Units" to "Employees in This Organizational Unit" and vise versa.

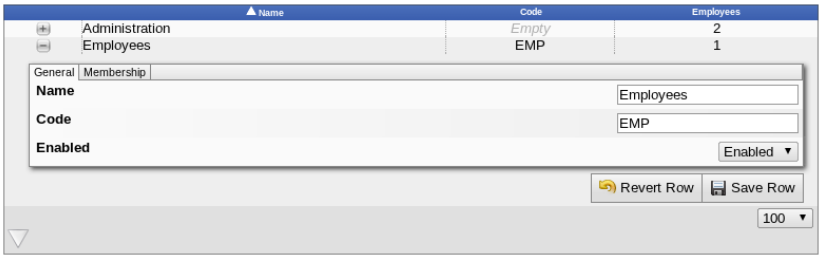
NOTE: Employees only belong to one Organizational Unit at a time.

To Include Inactive Organizational Units



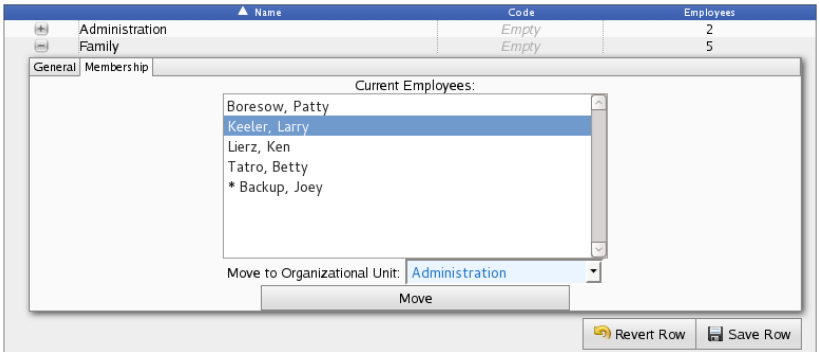
1. Click on the **+** (plus) sign in the far left corner of the **Display Options** bar.
2. Check the box next to **Show Inactive Organizational Units**.
3. Click the **Display** button.

To Edit an Existing Organizational Unit



1. Click on the **+** (plus) sign to the left of the Organizational Unit's name to expand the unit's details.
2. Click on the **General** tab, if not selected.
3. Enter or adjust the Organizational Unit's **Name** and/or **Code** if necessary.
4. Save your changes by clicking on the **Save Row** button.

To Edit Employee Membership



1. Click on the **+** (plus) sign to the left of the organizational unit name to expand the unit's details.
2. Click on the **Membership** tab.
3. To move employees from the current department to another, highlight the employee's name in the **Current Employees** list, select the new Organizational Unit in the **Move to Organizational Unit** pull-down list, and click on the **Move** button.

Note: Terminated employees appear in the list with an asterisk in front of their name.

4. Save your changes by clicking on the **Save Row** button.

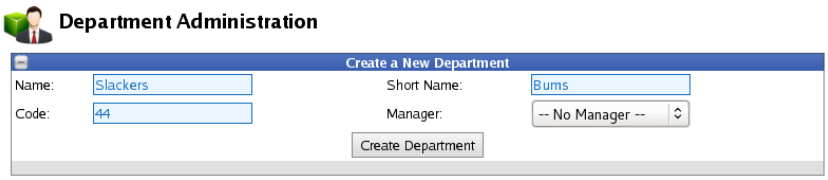
Departments

Departments and Jobs can be used to track time spent on one task versus another.

Note: If you have upgraded your TimeIPS System from a version older than 1.10, the system named "Departments" has been renamed to "Organizational Units". Organizational Units are used to categorize employees. There is a new "Departments" system. This change was made after extensive customer feedback concerning the nomenclature of these systems and their intended use.

Using the left pane Main Menu » Administration, click on: Employees » Departments

To Create a New Department:



1. Click on the **+** (plus) sign in the far left corner of the **Create a New Department** bar.
2. Enter the Department's **Name**, **Short Name**, and **Code**, then select the Department **Manager.**

NOTE: Once a Department has been created, it can not be deleted. However, the name of the department and the other information and settings associated with it can be changed.

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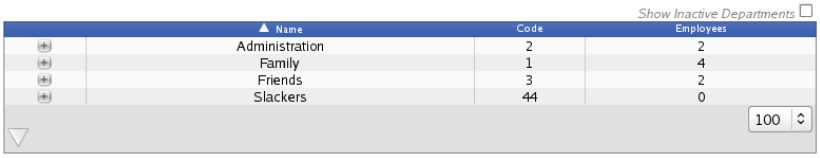
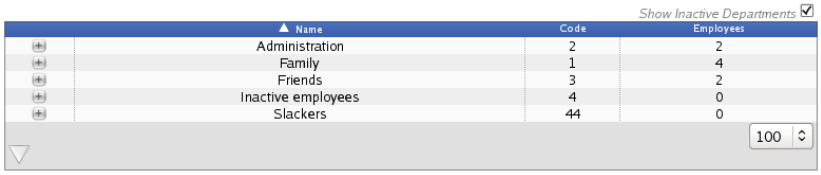
3. Click the **Create Department** button to save.

The new department will then display in the list below.

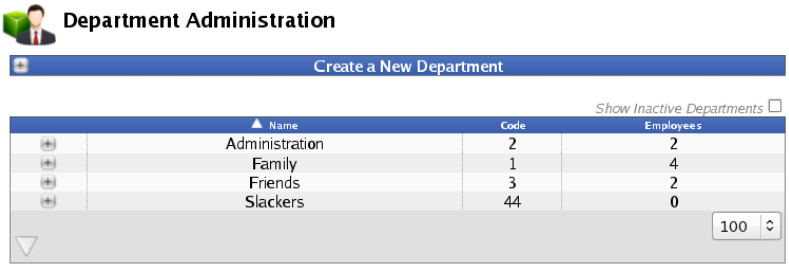


To Include Inactive Departments



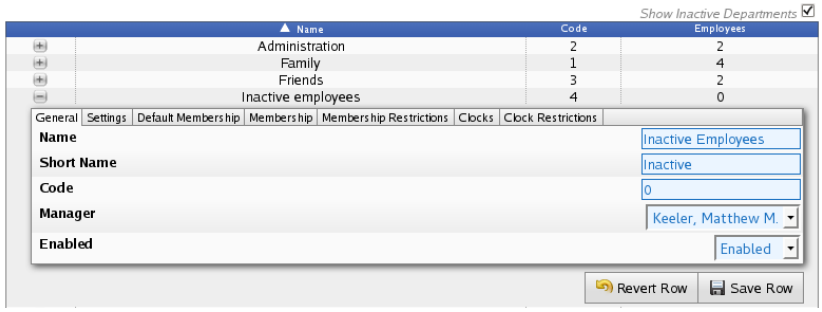
- Check the **Show Inactive Departments** box above the list.
- The list will then automatically update to include any inactive departments.

To Edit an Existing Department



- Click on the **+** (plus) sign to the left of the Department's name.

General Information

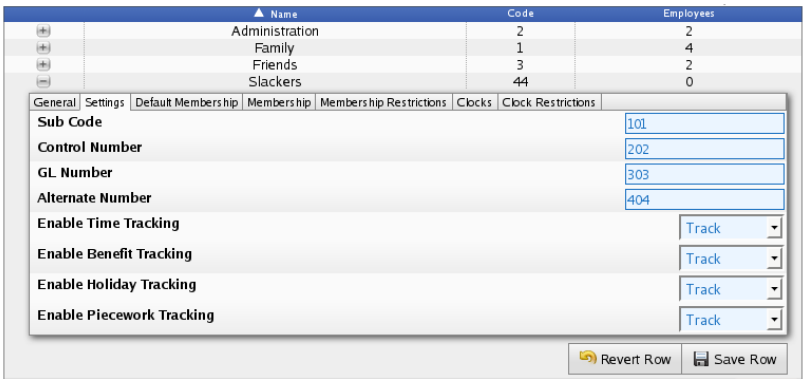


1. Click on the **General** tab, if not selected.

2. Enter or adjust the Department's **Name**, **Short Name**, and/or **Code** if necessary.
3. Select the correct Manager from the drop down list.
4. Choose to either enable or disable this Department. **Enable** allows you to use this Department. **Disable** can only be selected while there are no employees or clocks associated with it.
5. Save your changes by clicking on the **Save Row** button.

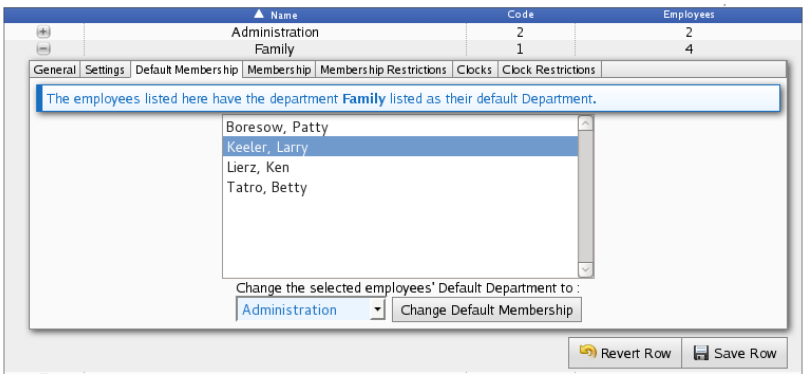
Settings

The items on the **Settings** tab are connected to items in Custom Payroll Exports, and the values entered here will be filled in those custom fields.



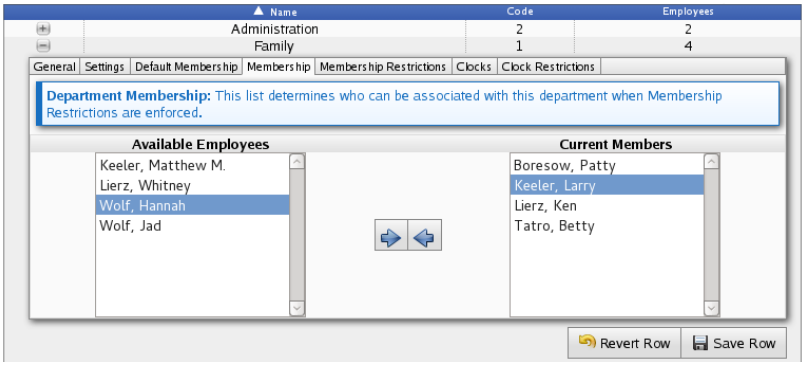
- Click on the **Settings** tab.
- Provide or adjust the Department's **Sub Code**, **Control Number**, **GL Number**, and/or **Alternate Number**. These are codes you can customize to be useful for payroll export.
- Decide whether or not to track Time, Benefits, Holidays, and Piecework.
  - **Enable Time Tracking** to allow this Department to show up as an option on Clocks, Web Clocking, Group Clocking, Batch Entry, and any other place that worked time can be manipulated.
  - **Enable Benefit Tracking** to allow this Department to show up as an option when requesting or using Benefits.
  - **Enable Holiday Tracking** to allow this Department to show up as an option when configuring Holiday pay.
  - **Enable Piecework Tracking** to allow this Department to show up as an option when configuring and entering Piecework.
- Save your changes by clicking on the **Save Row** button.

Default Membership



- Click on the **Default Membership** tab.
- To move employees from the current department to another, highlight the employee's name in the list, select the new Department from the drop-down list, and click on the **Change Default Membership** button.
- Save your changes by clicking on the **Save Row** button.

Membership

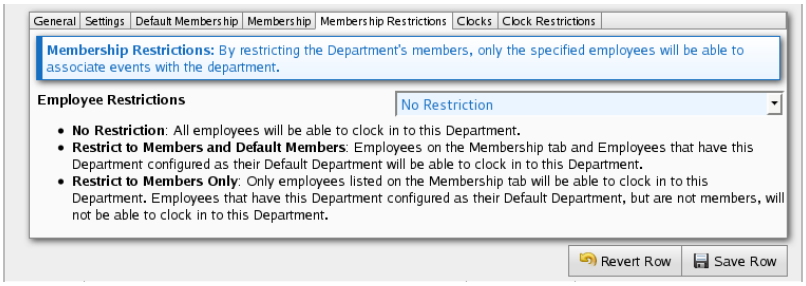


- Click on the **Membership** tab.
- To move employees in or out of this Department, click on the employees name and use the blue arrows to move them from "Available Employees" to "Current Members" and vise versa.

NOTE: This list determines who can be associated with this department when Membership Restrictions are enforced.

- Save your changes by clicking on the **Save Row** button.

Membership Restrictions

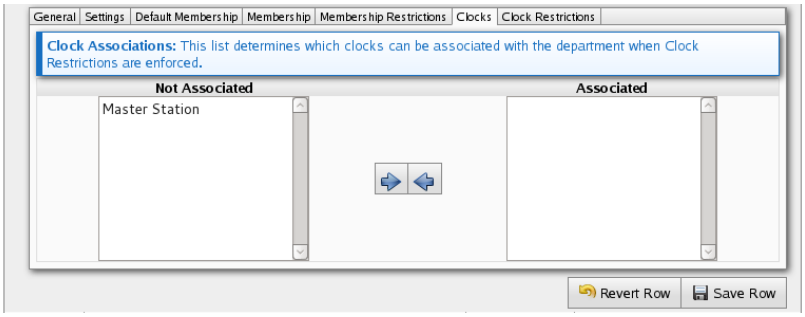


- Click on the **Membership Restrictions** tab.

NOTE: By restricting the Department's members, only the specified employees will be able to associate events with the department.

- From the **Employee Restrictions** drop-down box, choose between **No Restriction**, **Restrict to Members and Default Members**, and **Restrict to Members Only**.
- Save your changes by clicking on the **Save Row** button.

Clocks

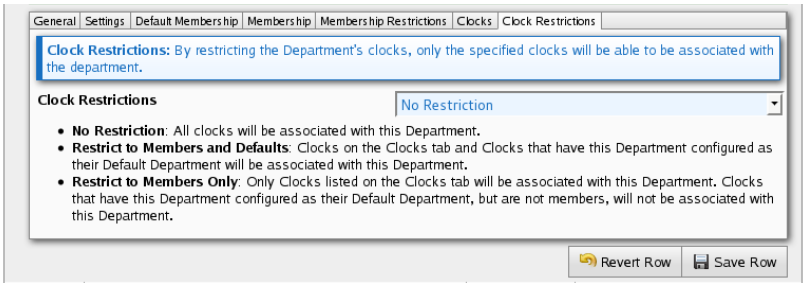


- Click on the **Clocks** tab.
- To move Clocks in or out of this Department, click on the clock's name and use the blue arrows to move them from "Not Associated" to "Associated" and vise versa.

NOTE: This list determines which clocks can be associated with the department when Clock Restrictions are enforced.

- Save your changes by clicking on the **Save Row** button.

Clock Restrictions



- Click on the **Clock Restrictions** tab.

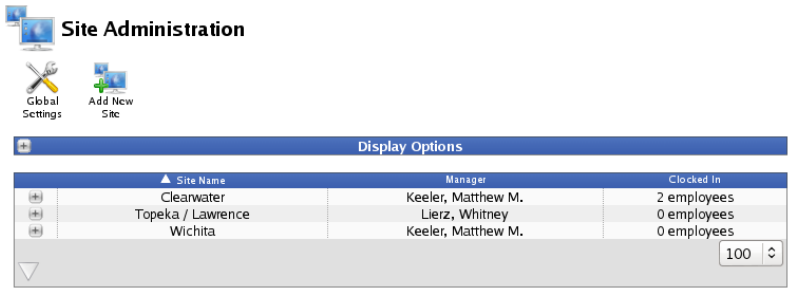
NOTE: By restricting the Department's clocks, only the specified clocks will be able to be associated with the department.

- From the **Employee Restrictions** drop-down box, choose between **No Restriction**, **Restrict to Members and Default Members**, and **Restrict to Members Only**.
- Save your changes by clicking on the **Save Row** button.

Site Adminstration

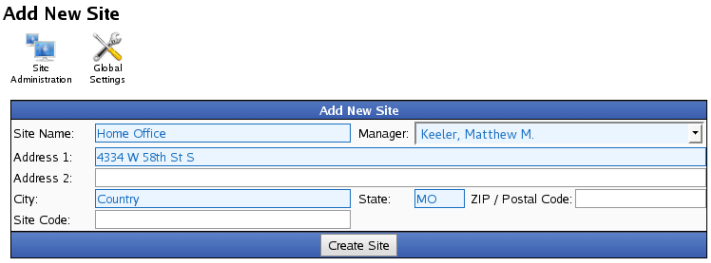
The TimeIPS Site Management module allows designation of sites, each with specified employees, managers, supervisors, coverage schedules, and disconnection handling.

Using the left pane Main Menu » Administration, click on: Employees » Sites



To Add a New Site:

1. At the top of the Site Administration page, click on the **Add New Site** icon.



2. Enter the **Site Name**.
3. Choose the site **Manager** from the drop-down list. (optional)

NOTE: Employees with the Site Manager permission are listed on the "Manager" pull-down menu.

4. Enter the physical **Address**. (optional)
5. Enter a **Site Code**. (optional)

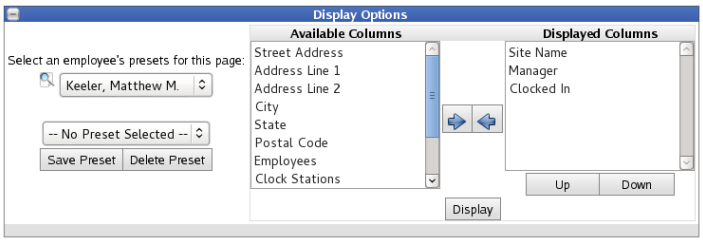
NOTE: Once a site is created, it can be edited but not deleted.

6. Click the **Create Site** button. The information will then be added to the Site Administration table.

Display Options

Display Options allow you to customize the Site Administration table.

1. Click the **+** (plus sign) on the **Display Options** bar to expand the window.



2. Move items from the **Available Columns** window to the **Displayed Columns** window by clicking on the desired field to highlight it, then click on the right arrow to move it.

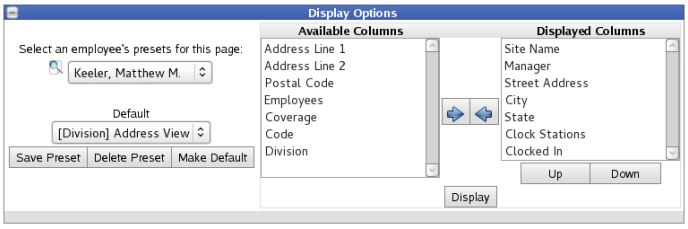
TIP: You can select multiple items to move by holding down the CTRL key while clicking on the individual fields. All the selected fields will be highlighted.

---

3. To change the order in which the **Displayed Columns** appear, click on a field to highlight it and then use the **Up** and **Down** buttons to arrange the list in the order you prefer.
4. Click on the **Display** button to view the changes in the Site Administration table.
   - OR - Click on **Save Preset** to save your custom view.

- You will be prompted to enter a **Name** for this Preset. Enter a descriptive name and click **OK**.

- You will then be prompted to choose between a **Personal Preset**, **Division Preset**, or **Global Preset** depending on which level should show this as an available option.

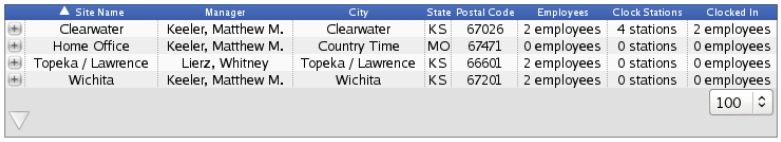


- To use a saved Preset display, select the Preset name from the pull-down menu. The Site Administration list will automatically refresh.
- Click on the **Make Default** button to see this custom view each time you return to the Site Adminstration page.

Site Adminstration Table

By default, managers can view and edit the data associated with the sites they manage. Only an employee with the Site Adminstration permission set to view and edit site data for all visible divisions, will be

able to do so. (Permissions can be customized if needed by using the IPSPRM permissions module.)



1. To sort the table by the selected column values, click on the column header (i.e., Site Name, Manager, Clocked In, etc.).
2. To quickly access the detailed information for a site, click on a value within a column (such as a site's Name, Manager Name, Number of Employees, etc.) and the table will expand to the appropriate tab. (For instance, clicking on a name in the Manager column above will expand the table to the Information tab for that manager's site.)

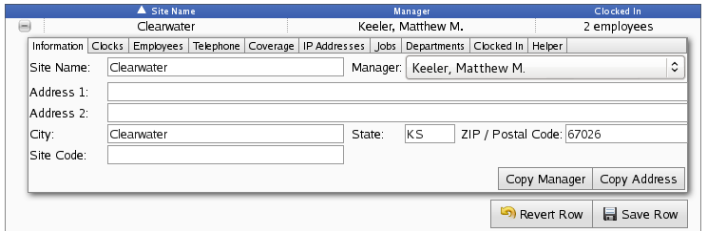
TIP: Some of the fields, such as the site's Address, City, State and Postal Code are "edit-in-place" fields when displayed on the Site Administration table. You can type the information in the field displayed, rather than expanding the table and going to the appropriate tab. (For instance, you can click on the words "Country Time" in the City column above and the field will become editable, allowing you to change the site's City.)

---

3. To view site details, click on the **+** (plus sign) to the left of the Site Name. The following tabs will display.

Information

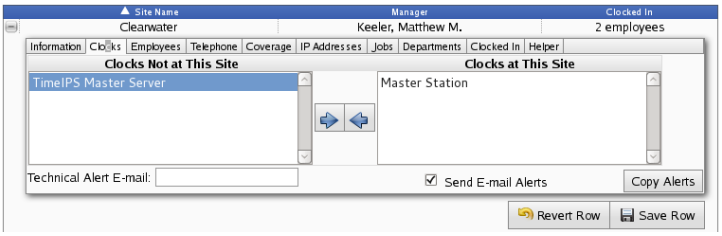
The Information tab allows basic configuration of the site, including the Site Name, Manager, Address and Code.



- After adding and/or editing any information, click **Save Row** to ensure your changes take effect.
- To copy the Manager or Address over to another division, click the **Copy Manager** or **Copy Address** button. This opens the **Helper** tab. [See the Helper Tab section of this article for further instruction.]

Clocks

The Clocks tab allows assigning a clock to the site.



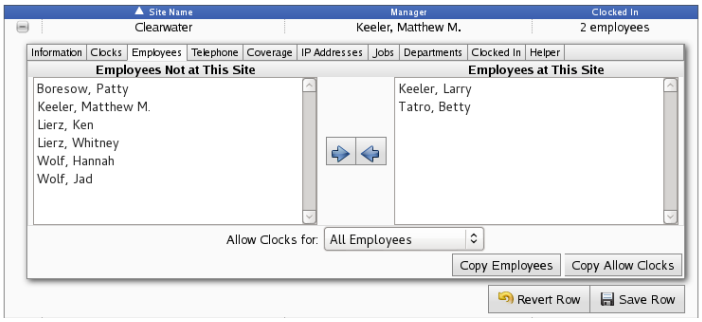
- Use the **Technical Alert E-mail** address to specify who should get alerts if the assigned clock or networking at the site are down. Make sure the **Send E-mail Alerts** box is checked.
- To copy the alerts over to another division, click the **Copy Alerts** button. This opens the **Helper** tab. [See the Helper Tab section of this article for further instruction.]
- To **add a clock** to the site, click on the name of the clock in the box on the left, then click the blue arrow pointing to the right.
- To **remove a clock** from the site, click on the name of the clock in the box on the right, then click the blue arrow pointing to the left.

TIP: If you have multiple divisions, you may need to assign the clock to the division of the site for it to show in either box. Do this on the Clocking -> Clock Configuration page, under the General tab of the clock.

- Click **Save Row** to ensure your changes take effect.

Employees

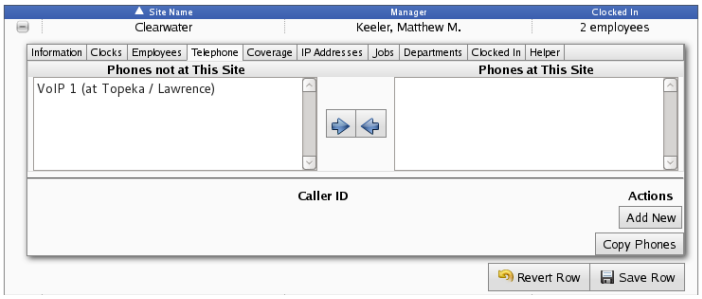
The Employees tab allows configuring which employees belong to the site. Employees can belong to multiple sites.



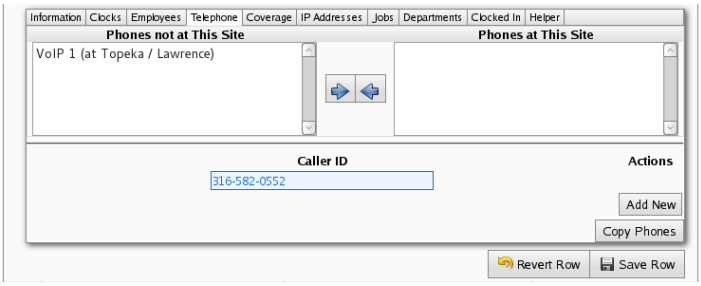
- First decide whether All Employees, or only employees belonging to this site, are allowed to clock in/out from the clocks associated with this site. Make this selection from the **Allow Clocks for** drop-down box.
- To **add an employee** to the site, click on the name of the employee in the box on the left, then click the blue arrow pointing to the right.
- To **remove an employee** from the site, click on the name of the employee in the box on the right, then click the blue arrow pointing to the left.
- Click **Save Row** to ensure your changes take effect.
- To duplicate these same selections to another division, click the **Copy Employees** or **Copy Allow Clocks** button. This opens the **Helper** tab. [See the Helper Tab section of this article for further instruction.]

Telephone

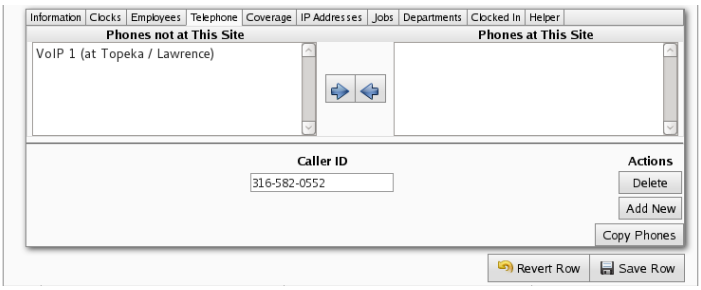
The Telephone tab allows configuring selected telephone clocking devices and/or CallerID names/numbers to the site.



- To **add a phone** to the site, click on the name of the phone in the left box, then click the blue arrow pointing to the right.
- To **remove a phone** from the site, click on the name of the phone in the right box, then click the blue arrow pointing to the left.
- To associate these same phones to another division, click the **Copy Phones** button. This opens the **Helper** tab. [See the Helper Tab section of this article for further instructions.]
- To add a new **Caller ID** that will be permitted to use TimeIPS Telephone Clocking when a clock belonging to this site goes down, click **Add New**.



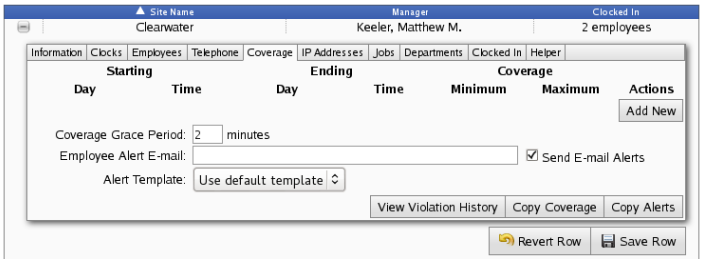
- Type in the Caller ID name or number in the empty box below **Caller ID**.
- After clicking **Save Row**, the option to **Delete** appears under Actions.



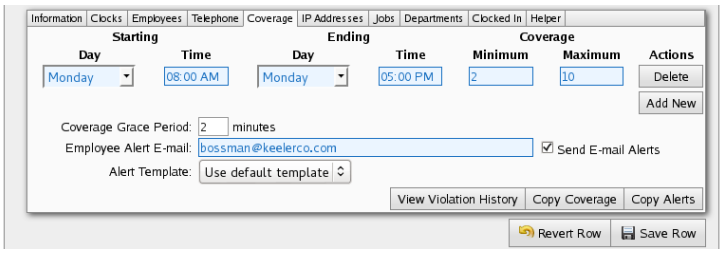
TIP: If "Track Coverage by Caller ID" is active, clock ins/outs made from these names or numbers will be associated with this site for coverage and reporting. In this case, Caller ID entries cannot belong to more than one site. See Global Settings.

Coverage

The Site Coverage tab allows configuring ranges of time when an expected number of employees should be working the site. Alerts can be sent when too few or too many employees are working. The Grace Period allows a few minutes for employees to start working and finish working without triggering a coverage email alert.



- Click the **Add New** button to add a new schedule rule.
- Selet the **Day** of the week and a **Time** you want the coverage rule to begin and end.
- Give a **Minimum** and **Maximum** number of employees that should be clocked in during this time.



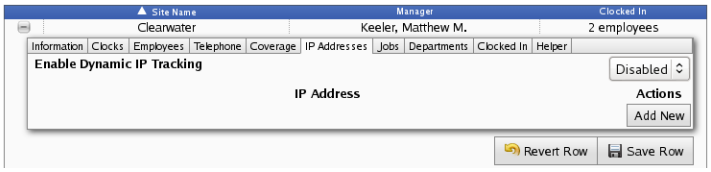
- Enter a **Grace Period** in minutes to allow employees a margin of time before and after this rule before an email alert is triggered.
- Enter an e-mail address in the **Employee Alert E-Mail** field and check the **Send E-Mail Alerts** box. If the number of employees currently clocked into the site is in voilation of the coverage rules, an alert e-mail will be sent to this address.
- If you have created an **Alert Template**, choose it from the drop-down box.

NOTE: Go to System >> E-Mail Templates to create your own custom templates.

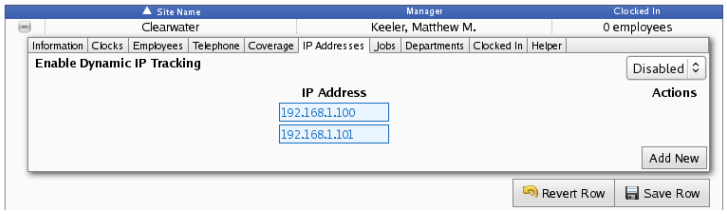
- Click **Save Row** to ensure your changes take effect.
- To apply these same coverage rules and alerts over to another division, click the **Copy Coverage** and **Copy Alerts** buttons. This opens the **Helper** tab. [See the Helper Tab section of this article for further instruction.]

IP Addresses

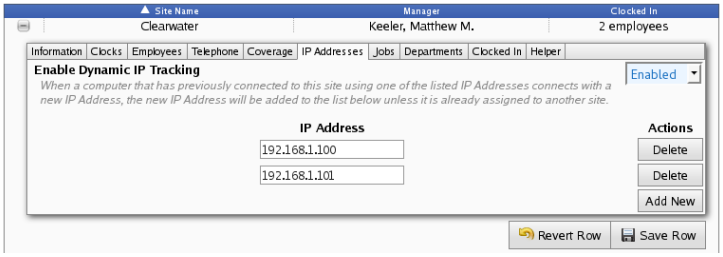
The IP Address tab allows selected IP addresses to be connected to the site when employees are remote/web clocking.



- Click **Add New**, to add a new **IP Address** to be associated with this site for remote clocking.



- Type in the **IP Address** in the empty box.
- After clicking **Save Row**, the option to **Delete** appears under Actions.

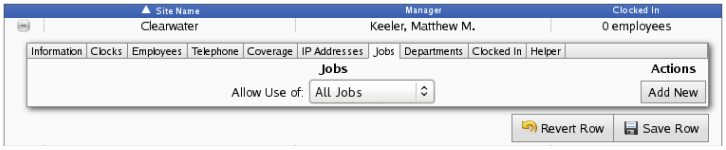


- **Dynamic IP Tracking** allows new IP Addresses to be automatcially added to the list when a previously associated computer picks up a new one. Remote clocking can then continue to be available on that computer. If the new IP address has already been added to a different site, it will not be added to this site automatcially. To enable this feature, choose enable from the drop-down box.

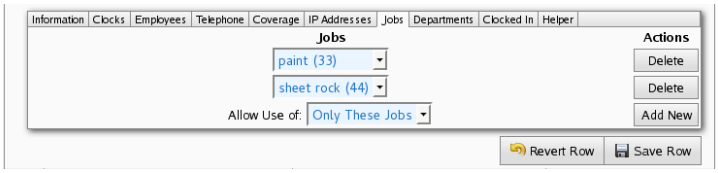
TIP: If "Track Coverage by IP Address" is active, remote clocking made from these IP Addresses will be associated with this site for coverage and reporting. An IP Address cannot belong to more than one site. See Global Settings.

Jobs

Specific jobs can be connected to a site.



- First decide whether to **Allow Use of**: **All Jobs** or only specific jobs at this site. Make your selection from the drop-down box.



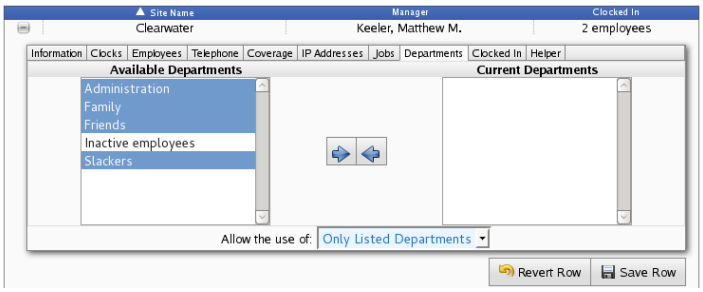
- If the "Allow Use of: **Only These Jobs**" option is selected, click the **Add New** button to add those **Jobs.**

Note: If employees have a default job that is not allowed at the site, and the employee clocks in without a job selected, the default job will still be used.

- After clicking **Save Row**, the option to **Delete** appears under Actions.

Departments

The Departments tab allows configuring of which departments belong to the site. Departments can belong to multiple sites.



- First decide whether to Allow the use of: **All Departments** or **Only Listed Departments** at this site. Make your selection from the drop-down box.
- If the **Only Listed Departments** option is selected, only those listed under Current Departments will be associated with this site. Move items from the **Available Departments** window to the **Current Departments** window by clicking on the desired field to highlight it, then click on the right arrow to move it.

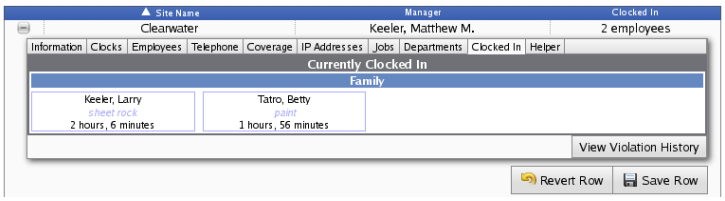
TIP: You can select multiple items to move by holding down the CTRL key while clicking on the individual fields. All the selected fields will be highlighted.

Note: If an employee has a default department that is not associated with this site, and the employee clocks in without a department selected, the default department will still be used.

- Click **Save Row** to ensure your changes take effect.

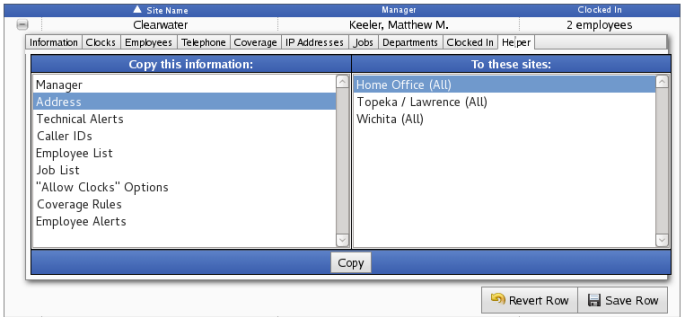
Clocked In

The Clocked In tab provides a quick view of which employees are currently clocked into the site.

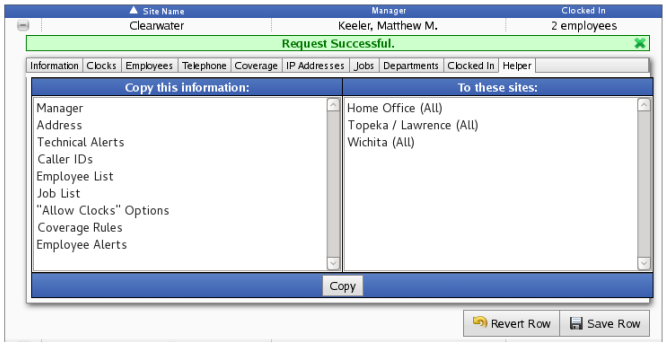


Helper

The Helper tab allows information from one site to be quickly copied to one or more additional sites.



- Click to highlight the **Information** and the **Site(s)** that should receive the information.
- Click the **Copy** button and then **Save Row**.
- A green bar momentarily appears to indicate the **REQUEST** was **SUCCESSFUL**.



Global Settings

You can associate specific telephone numbers and IP addresses with your site Coverage settings to provide employees with additional means to clock into a site while simultaneously keeping track of your site coverage.

1. At the top of the Site Administration page, click on the **Global Settings** icon.

2. Check the box next to **Track Coverage by IP Address** to enable tracking by IP address. When an employee clocks in using Remote Clocking, the IP address will be used to determine which site the employee is clocked into.
3. Check the box next to **Track Coverage by Caller ID** to enable tracking by phone number. When an employee clocks in using Telephone Clocking, the phone number will be used to determine which site the employee is clocked into.

NOTE: When this setting is active, Caller ID entries cannot belong to more than one site.

Manage Employee Selection Groups

Employee Selection Groups are pre-set selections of employees that can be chosen on many pages in the TimeIPS adminstration interface. This allows convenient access to commonly used groups of employees without needing to select each one every time.

TIP: Because large installations may have multiple employees with the exact same name, the Employee Selection Lists can be configured to display names with badge numbers or alternate numbers to differentiate the users. This is a per-user setting found under My Settings » Employee List Options.

Using the left pane Main Menu » Administration, click on: Employees » Selection Groups

Creating a new Employee Group

Employees and groups selected in the "Include" tab will be included in the report when the Employee Selection Group is chosen, except for employees or groups selected in the "Exclude" tab. (See Example 3.)

Inclusion

- To include certain groups and/or employees, select the **Include** tab on the top of the box. The box will be **green** to indicate inclusion.
- Select groups and/or employees from the different sections: **General**, **Divisions**, **Default Departments**, **Sites**, etc.

TIP: Hold down the Control key (or on Mac, the Command key) while clicking on entries to select multiple rows in the same section, or to deselect a highlighted row.

Example 1: Selecting "All Employees" can be used to select all active employees, where choosing a specific department will select all the employees who work in that Department.

NOTE: TimeIPS is capable of advanced permissions and management. When a user selects "All Employees" for a Time Report, that user will only see the report for employees where permission allows them to be seen.

Example 2: Choosing from more than one section will display all associated employees. For instance, selecting "3rd Shift" from Shifts and "Development" from Default Departments will give you all employees that are in the 3rd Shift payroll type AND all employees that are in the Development Department, not just all employees in the Development Department who also work 3rd Shift.

Selection Groups

Select an employee's presets for this page:

Keeler, Matthew M.

-- No Preset Selected --

Save Preset | Delete Preset

Exclusion

- To exclude certain groups and/or employees, select the **Exclude** tab on the top of the box. The box will be **red** to indicate exclusion.
- Select groups and/or employees from the different sections: **General**, **Divisions**, **Default Departments**, **Sites**, etc**.**

Example 3: If John Doe belongs to the "Administration" organizational unit, and the Administration organizational unit is selected on the "Include" tab but John Doe is selected on the "Exclude" tab, the report will include all employees from the Administration organizational unit EXCEPT for John Doe.

Include
Exclude
Exclude General
All Employees
All Active Employees
All Inactive Employees
Myself (Current Employee)
My Manager
Hourly Employees (At time of run)
Salaried Employees (At time of run)
Exclude All Employees In Selected Divisions
Keeler Co.
Programmers
Seinfeld
Exclude All Employees In Selected Payroll Types
Keeler Co.
Direct
Programmers
Direct
Seinfeld
Direct
Exclude All Employees In Selected Organizational Units
Keeler Co.
Administration
Family
Friends
* hot shots
Programmers
Development
Research
Exclude All Employees With Selected Default Departments
Keeler Co.
Administration
Family
Friends
Slackers
* Inactive employees
Programmers
Development
Exclude All Employees In Selected Sites
Keeler Co.
Clearwater
Home Office
Topeka / Lawrence
Wichita
Programmers
Bell Labs
Standford
Exclude All Employees Who Have Ever Worked Jobs
Keeler Co.
paint
sheet rock
Programmers
C
LaTeX
Multics
Exclude All Employees With Selected Default Jobs
Keeler Co.
paint
sheet rock
Programmers
C
LaTeX
Multics
Exclude All Employees In Selected Workweek Groups
Keeler Co.
Direct
Programmers
Direct
Seinfeld
Direct
Exclude All Employees In Selected Schedule Groups
Keeler Co.
ClockOutEndOfDay
Programmers
Auto Clocking
Exclude All Employees In Selected Accrual Groups
Keeler Co.
Default
Programmers
Default
Seinfeld
Default
Exclude All Employees In Selected Holiday Groups
Keeler Co.
All Holidays
Programmers
All Holidays
Seinfeld
All Holidays
Exclude All Employees In Selected Permission Groups
Full Access
Managers
Employee Administrators
System Administrators
Payroll Administrators
Division Managers
Employees
Site Managers
Exclude All Employees In Selected Shifts
Keeler Co.
First Shift
Second Shift
Third Shift
Seinfeld
First Shift
Second Shift
Third Shift
Exclude All Employees Managed By
General
Myself (Current Employee)
My Manager
Keeler Co.
Keeler, Matthew M.
Lierz, Whitney
Seinfeld
Costanza, Frank
Exclude Active Employees
Keeler Co.
Boresow, Patty
Keeler, Larry
Keeler, Matthew M.
Lierz, Ken
Lierz, Whitney
Tatro, Betty
Wolf, Hannah
Exclude Inactive Employees
Keeler Co.
*Backup, Joey

Preview

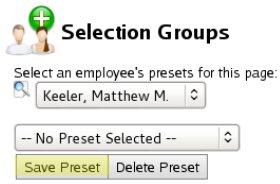
- To preview selected employees, click on the **Preview Employees in Group** button at the very bottom of the page.

Employee List
Note: When using this preset, per-page permissions may reduce the included employees.
Beniz, Elaine
Boresow, Patty
Keeler, Larry
Keeler, Matthew M.
Kramer, Cosmo
Lierz, Whitney
Peterman, J
Seinfeld, Jerry
Seinfeld, Morty
Tatro, Betty
Wolf, Jad
Total count = 11

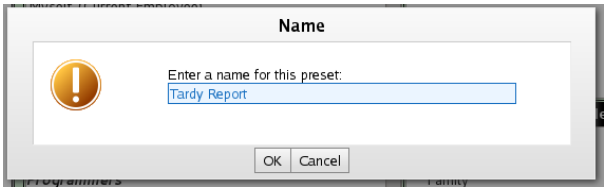
Save

Presets saved here will appear in employee lists where Employee Selection Groups can be used. These presets are personalized for your use.

- When the **Employee List** is how you want it, click on the **Save Preset** button at the top of the screen.



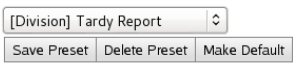
- You will be prompted to enter a **Name** for the new preset. Add a descriptive name and then click OK.



- You will then be prompted to choose between a **Personal Preset**, **Division Preset**, or **Global Preset** depending on which level should show this as an available option.

NOTE: Groups labeled as "Global" can be selected by all employees, but can only be edited by employees with Full Access.

- To use a saved Preset display, select the Preset name from the pull-down menu.
- Click on the **Make Default** button to see this custom view each time you return to the Selection Groups page.



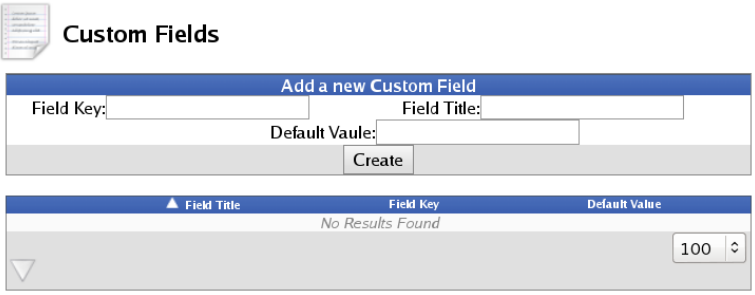
See Also:
Manage Employee Selection Groups
Manage Detailed and Summarized Report Presets
Manage Employee Selection Groups

Custom Fields

Custom Fields enable you to create custom data fields for employees that can be used in running Custom Payroll reports.

NOTE: This feature requires the IPSCDF module.

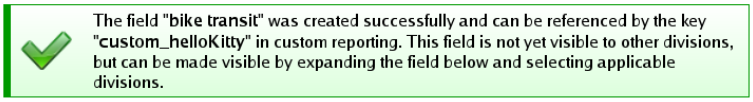
Using the left pane Main Menu » Administration, click on: Employees » Custom Fields



Creating a New Custom Field

- Add a **Field Key**, descriptive **Field Title**, and **Default Value**.
- Then click the **Create** button.

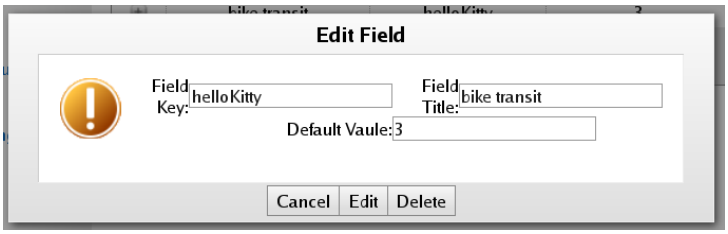
- The following message will display confirming the creation was successful.



- The new Custom Field is now visible in the list below.

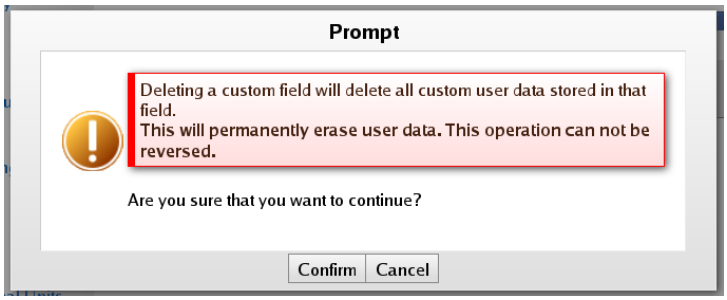
Edit

- To edit, click the **Edit** button to the right of the Custom Field.
- The Edit window will pop up. Simply correct the information and click the **Edit** button.

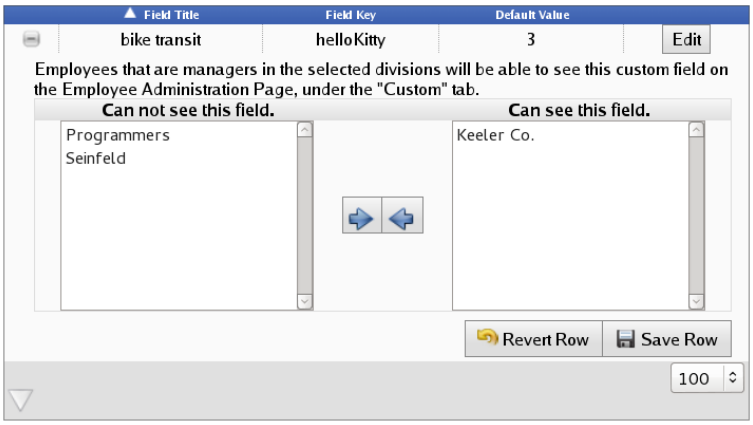


Delete

- From the Edit window, you can also delete this Custom Field by clicking the **Delete** button.
- You will be prompted to confirm the deletion.



Who Can See the Custom Field



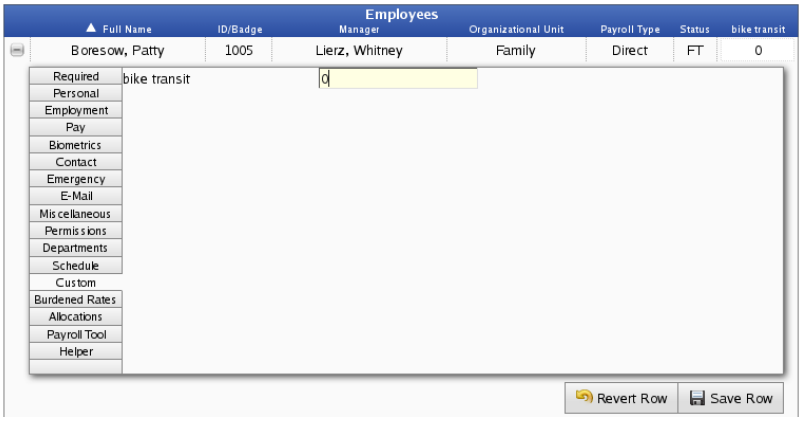
- Click on the **+** (plus) sign to the left of the Field Title you created (shown here as "bike transit").
- To move divisions from one column to another, click on the division to highlight it and then click the left or right arrow to move it accordingly.
- Employees that are managers in the divisions listed in the **Can see this field** column, will be able to see the custom field on the Employee Administration Page, under the "Custom" tab.

View from Employee Administration Page

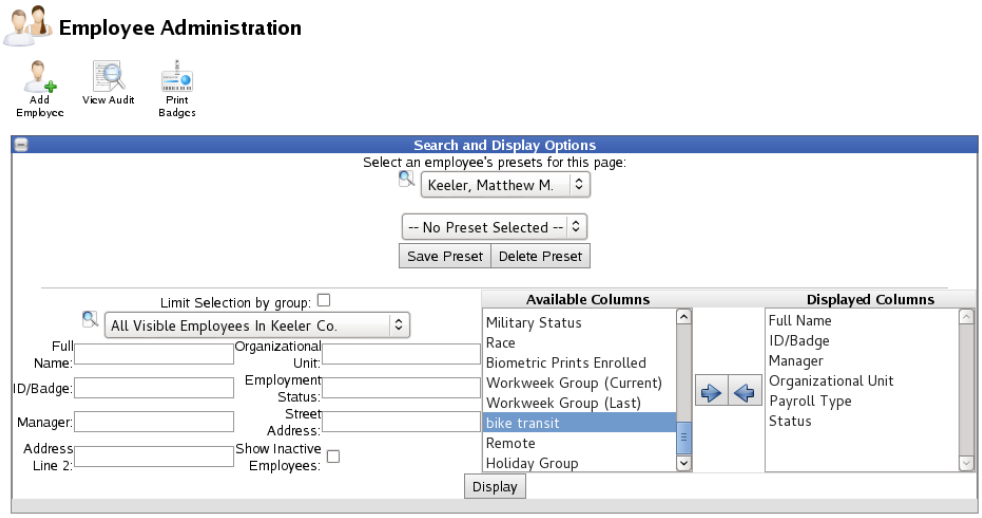
Using the left pane Main Menu » Administration, click on: Employees » Employees

Custom Tab

- The **Custom** tab will display the custom fields which can be filled in with the employee's corresponding information.



To Display the Custom Field in the Employee Table.



- Click on the **+** (plus) sign in the upper left corner of the **Search and Display Options** bar.
- Find the item under **Available Columns** and click on it to highlight. Then click on the blue arrow pointing to the right to move the item to the **Displayed Columns** window.

TIP: You can also just simply double-click the item you wish to move.

- When you are done making changes, click on the **Display** button to view the selected fields in the Employee table below.

- The Custom Field value (shown as "0") can be edited from the custom tab or right here on the Employee table. From the table, just click on the value field and edit the text. The table will automatically update when you click outside that field.

Custom Payroll Reports

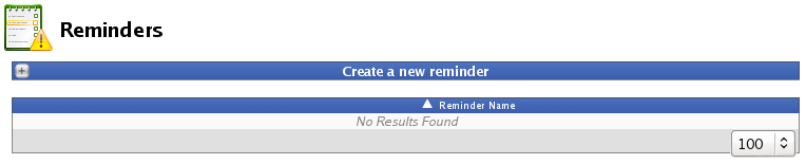
To include this Custom Field on a Custom Payroll Report, see the **Custom Reporting/Payroll Export Settings** Article.

See Also:
Custom Reporting/Payroll Export Settings

Reminders

The IPSEML Email Automation module provides the ability to create automated email reminders for a number of common situations.

Using the left pane Main Menu » Administration, click on: Employees » Reminders



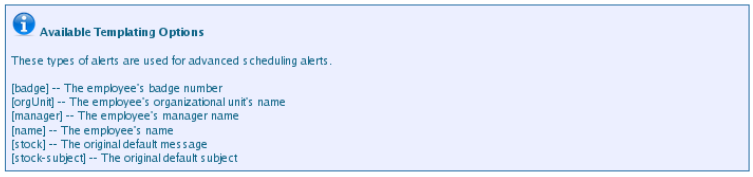
- Click on the **+** (plus) sign in the far upper left-hand corner of the **Create a new reminder** bar.

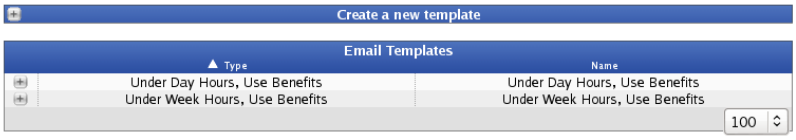
NOTE: If you have not yet added a template, you will be directed to do so first before continuing.

Add an E-Mail Template

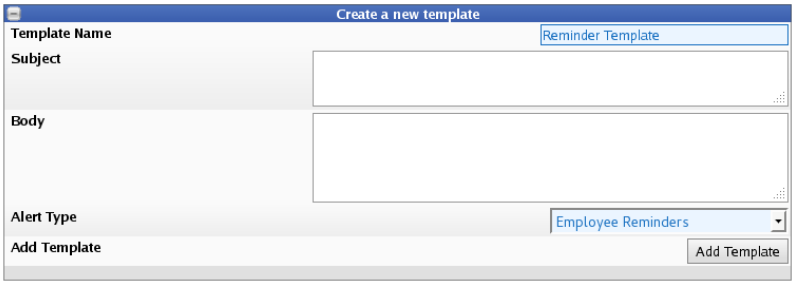
Using the left pane Main Menu » Administration, click on: System » E-Mail Templates

E-Mail Templates

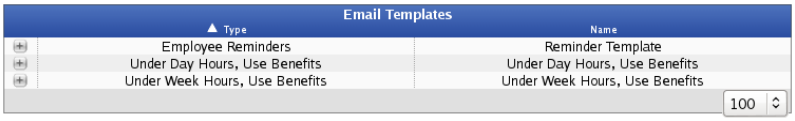




- Click on the **+** (plus) sign in the far left corner of the **Create a new template** bar.
- Choose "Employee Reminders" as the **Alert Type**.
- Add a descriptive **Template Name**.

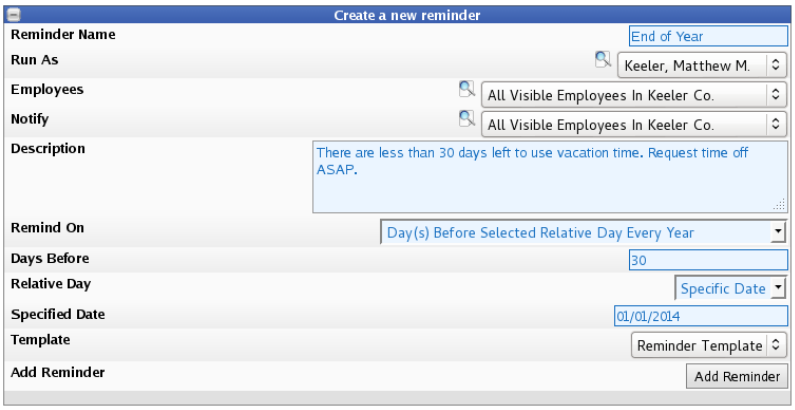


- Type in the **Subject** and **Body** of the email as you would like it appear in the employees inbox.
- Click the **Add Template** button and the new template will appear below in the **Email Templates** list.

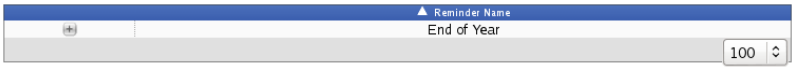


- You can now return to the **Reminders** page to continue setting up the reminder.

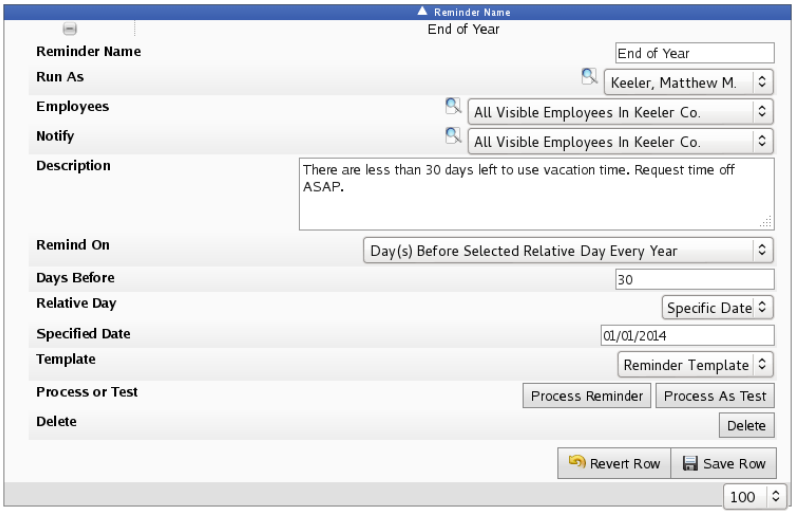
- Back on the **Reminders** page, click on the **+** (plus) sign in the far upper left-hand corner of the **Create a new reminder** bar.



1. Add a descriptive **Reminder Name**.
2. Under **Run As**, choose which employee the reminder will be run under. Typically, you will specify yourself.
3. Choose which **Employee(s)** this reminder applies to.
4. Choose which employee(s) this reminder will **Notify**, using each employee's preferred contact method as configured on the employee's "Email" tab.
5. Add a detailed **Description** of the reminder.
6. From the **"Remind On"** drop-down list, choose the type of event on which to trigger a reminder.
    - **Calendar Date** will alert on a set day on a specific year
    - **Day(s) Before Selected Relative Day Every Year** allows to alert on (or selectable days before) an employee's birthday, anniversary, or any other specific day each year.
    - **Day(s) Since Hire Date** will alert employees on a specified number of days after their hire date.
    - **Employee Average Weekly Hours above/below a threshold** option will send an alert when an employee's average weekly hours either exceed or are below a set amount, with a selectable number of weeks to include in the average.
    - **Employee Hours above a threshold** will alert when an employee's total cumulative hours exceed a set amount.
7. Choose the email **Template** to use when sending out notifications.
8. Click the **Add Reminder** button to implement the alert. It will be added to the Reminder List below.



To Edit an Existing Reminder



- On the Reminder list, click on the **+** (plus) sign to the left of the reminder you wish to edit (Example here is "End of the Year").
- All of the original set up options are editable, plus 2 additional options.
    - The **Process or Test** option allows you to force the reminders to run now by selecting "Process Reminder" or you can generate a test email to review by clicking "Process As Test".
    - If you do not want this reminder any more, you can also **Delete** it from here.

NOTE: There is NO delete confirmation prompt. Once you click the delete button, the reminder is removed.

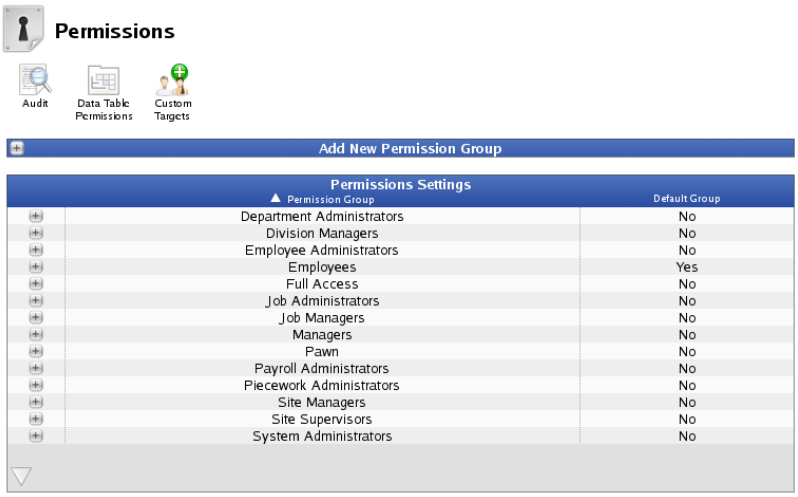
Enterprise Permissions

The TimeIPS Enterprise Permission module is designed for companies that need to delegate responsibility and carefully control access within TimeIPS.

The TimeIPS Enterprise Permissions module (IPSPRM) provides the following features:

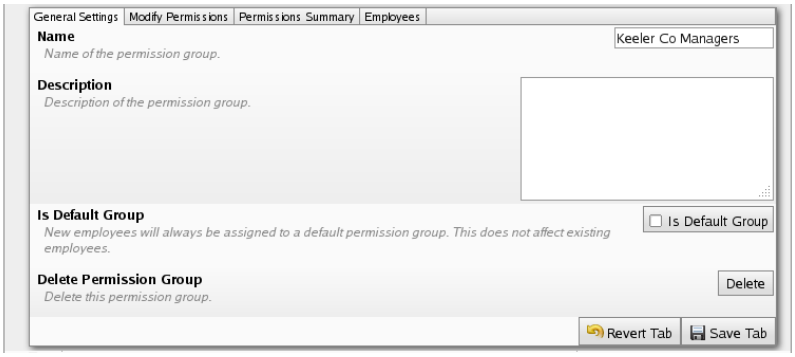
- Ability to create and manage permission groups that grant access or control over user-selectable groups of items.
- The items that can be controlled are virtually everything in TimeIPS. For example: employees, jobs, departments, employee pay rate, job codes, work orders, etc.
- The access or control levels include viewing, creating, editing, and deleting.
- Which items have access or control can all be based on the item being managed by you, being in your department, being in a site you manage, being in your division, being in a division you manage, etc.
- Employees can be assigned to one or more permissions groups. Thus, each employee will get the sum of all permissions granted by all groups assigned to them.

Using the left pane Main Menu » Administration, click on: Employees » Permissions



Each **Permission Group** includes a set of permission options. These options can be viewed by clicking the + next to the names and viewing the entries within them. Some areas have several levels of options, indicated by additional + signs when you open the first level.

General Settings

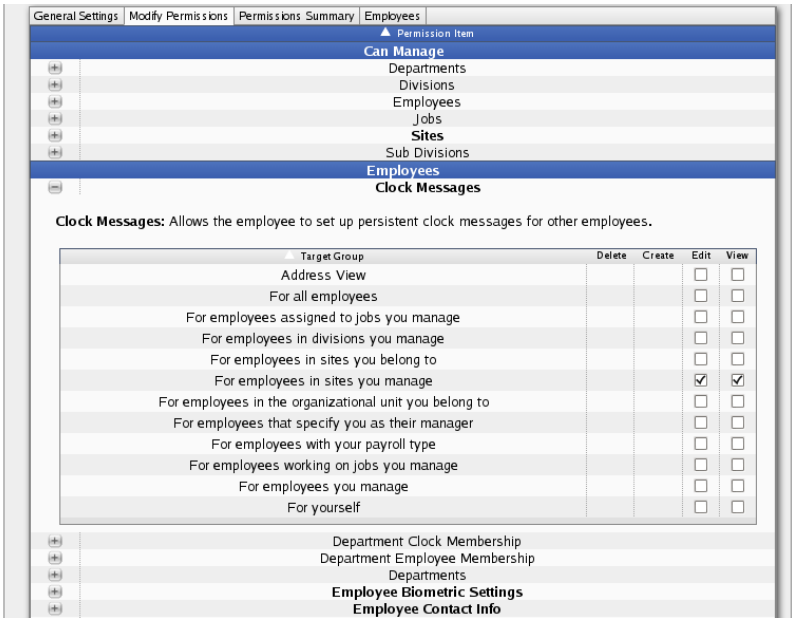


On the General Settings tab, you can

- change the **Name** of the permission group
- add a **Description** of the permission group
- select this as the **Default Group** for new employees
- or **Delete** this permission group

Modify Permissions

On the Modify Permissions tab, the actions and information this group has access to and control over can be changed.



Permissions Summary

The Permissions Summary tab contains an overview of all the actions and information this group has access to and control over.

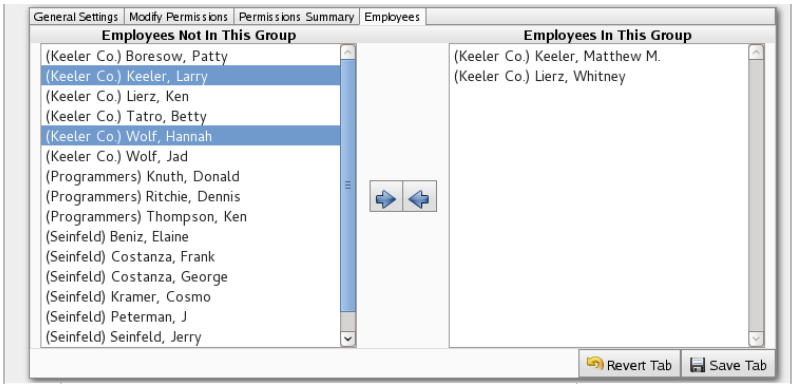
Employees

Employees can belong to zero or many groups. Each group is allowed access to various actions and information. An employee who belongs to a group assumes all those permissions, and an employee who belongs to multiple groups will collect permissions from all the groups to which he belongs. Employees can belong to as many permission groups as needed to give them all the permissions necessary.

To give employees additional permissions

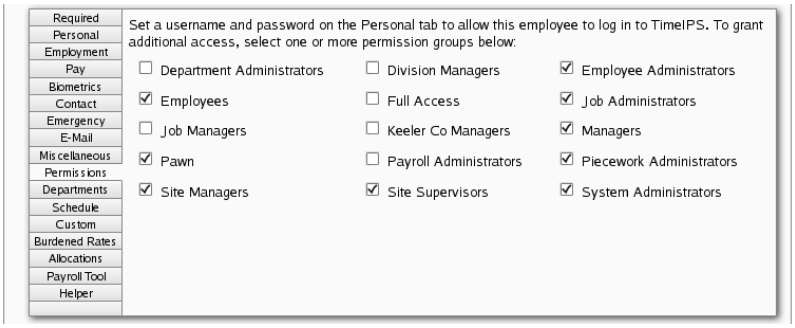
1. Click the **+** (plus) sign next to the group you would like to add them to.
2. Go to the **Employees** tab.
3. Click on the employee's name to highlight it in the **Employees Not In This Group** column. Hold down the control key to hightlight mulitple names.
4. Click the arrow pointing right to move the employee(s) to the **Employees In This Group** column.

5. Click the **Save Tab** button to implement the changes.

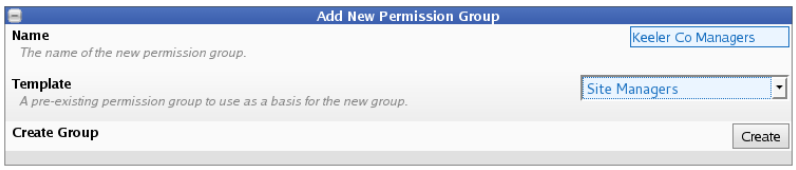


TIP: Permission Group membership can also be managed on the Permissions tab of the Employee Adminstration page.

Using the left pane Main Menu » Administration, click on: Employees » Employees » Permissions



Add New Permission Group



1. Choose a **Name** for the new permission group.
2. From the **Templates** drop-down box, choose a pre-existing permission group to use as a basis for the new group.
3. After clicking the **Create** button, the new permission group will appear in the Permissions Settings table.

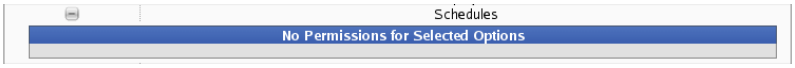
Audit

The Permission Audit provides a quick way to check who can do what based on the current permission groups and employee membership.

Example 1: See everything that a certain employee can do.

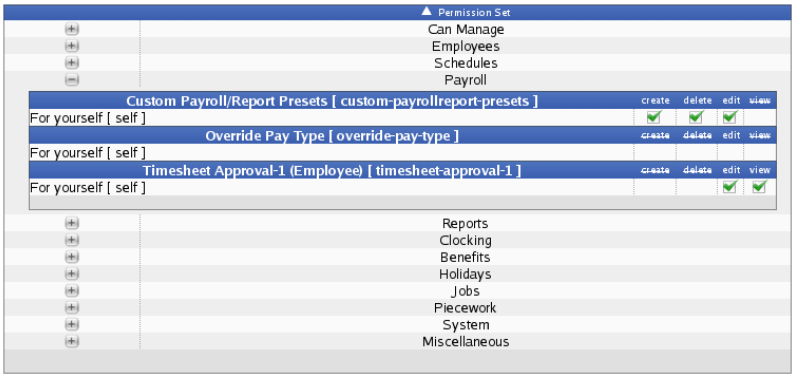
- Select that employee from the "Who:" drop-down box and click "Submit".
- The list of everything that employee can do will be listed below.

- Click the **+** (plus) sign to the left of a category to see which permissions the selected employee has associated with that category.



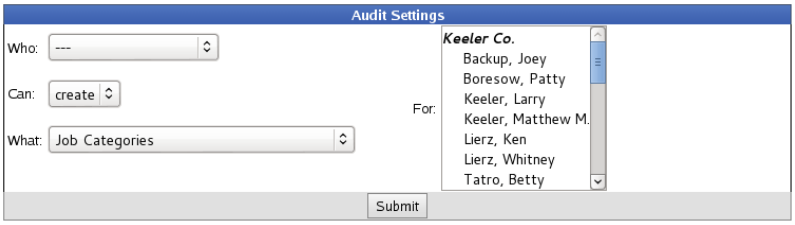
- In this example...
  - Betty has NO Schedule Permissions.

  - Betty does have the following Payroll permissions:
    - Create, delete, and edit Custom Payroll/Report Presets for herself
    - Edit and view Timesheet Approvals for herself.



Example 2: See everyone who can create Job Categories.

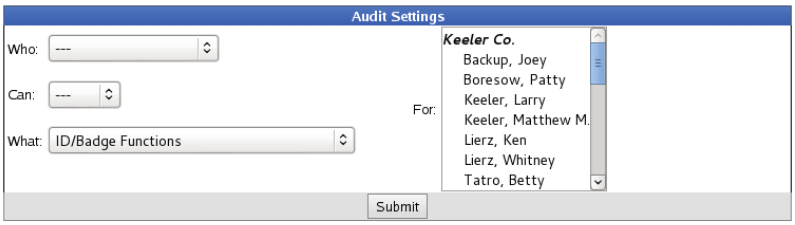
- Select "create" under "Can:" and "Job Categories" under "What:" and click "Submit."

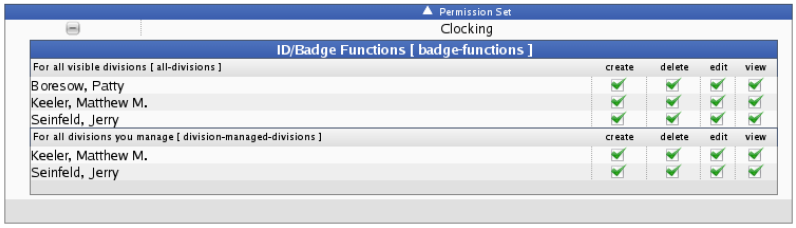


- The list will show who can create Job Categories.

Example 3: See everyone who can work with badges.

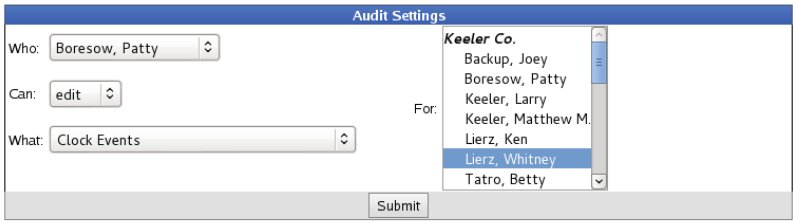
- Select "ID/Badge Functions" in the "What:" option and click "Submit.
- The list will show who can produce badges, and for who.

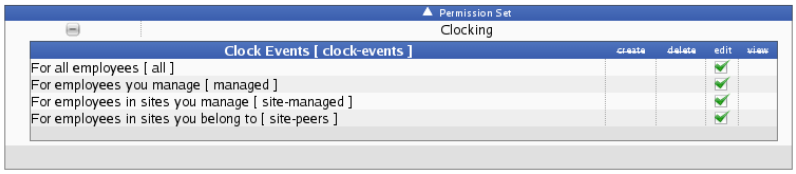




Example 4: See who can do what **For** selected employees.

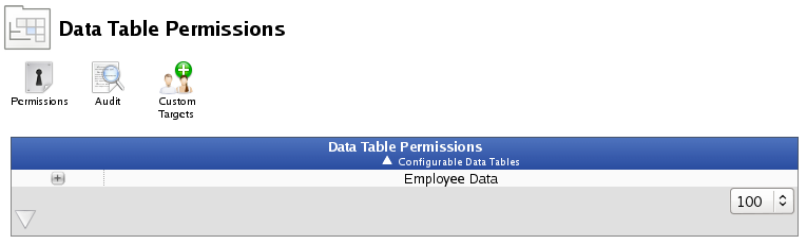
- Select a value for "Who:" and "Can:" and "What:" and "For:", then click "Submit.
- The list will show who can do what for the selected empolyees.



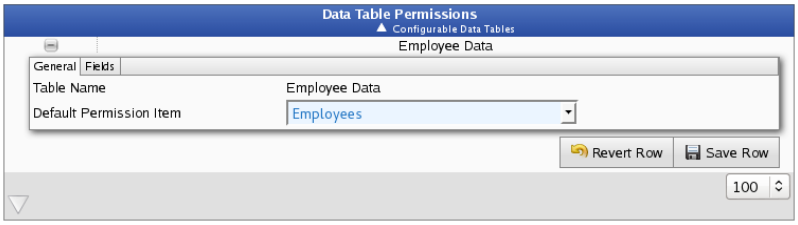


Data Table Permissions

Data Table Permissions can be used to accommodate special situations where access to or restriction of specific fields in a data table is needed.



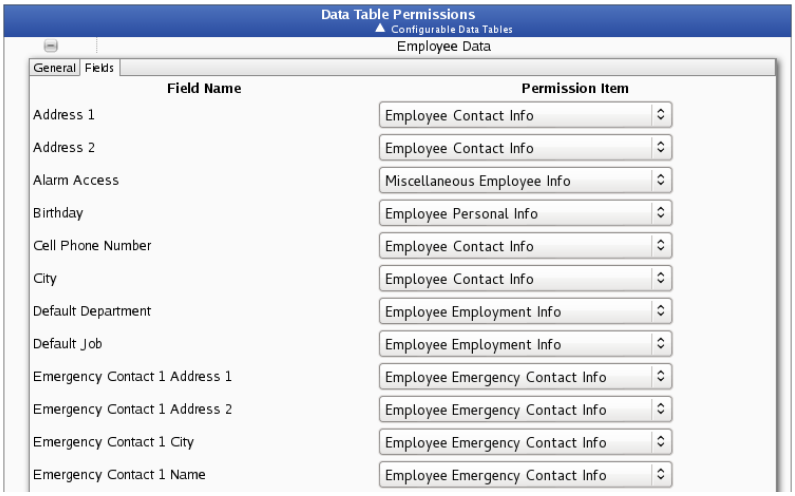
Click the **+** (plus) sign next to **Employee Data** to expand the table.



From the **General** tab, you can change the Default Permission Item. This is a catch-all permission level for any employee data that is not listed on the Fields tab. In most cases, this is best left at "Employees".

Field Permissions

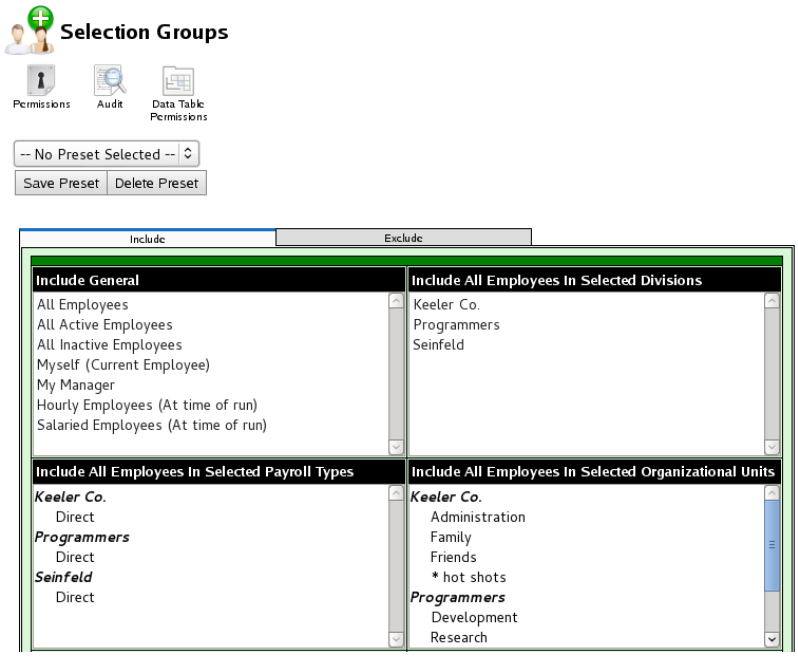
Field Permissions provides a way to control which permission option is used for specific fields, primarily in the employee database tables. Under the "Fields" tab, each data **Field** is connected to a default **Permission Item**. Selecting a different Permission Item allows giving or restricting access to the field as needed.



In most cases, no changes will be needed to these permissions. In some cases, however, it may be beneficial to include specific employee fields in different permission options. For example, an employee's birthday is normally assigned to the employee-personal-info permission option. If you needed to keep birthdays more confidential, you might change it to the employee-pay-rate option. This way, only employees with pay-rate viewing ability could see an employee's birthday.

Custom Targets

The Custom Targets Icon links to a special version of the Selection Groups page. Here you can create pre-set groups of employees that will be used as custom targets for permission groups. Using pre-set selections of employees allows convenient access to commonly used groups of employees without needing to select each one every time. These presets will be global across all divisions.



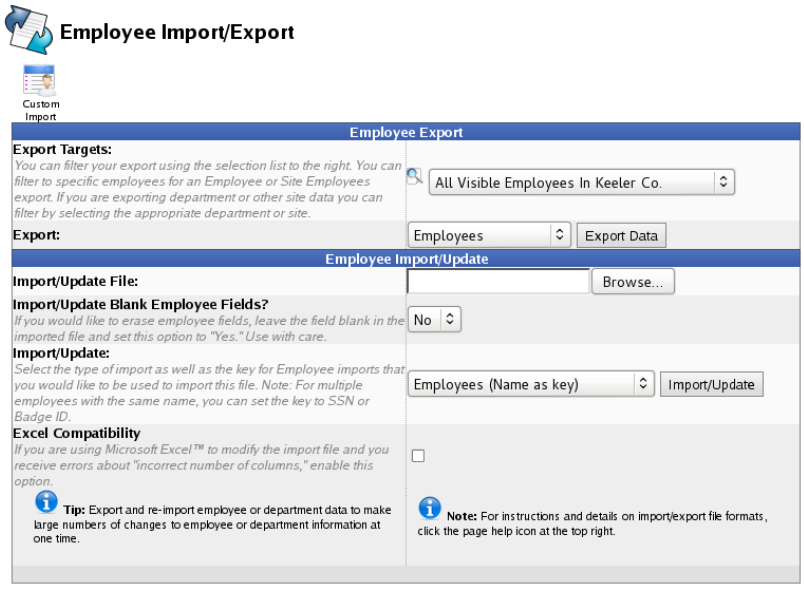
Check out the Selection Groups article for detailed instructions.

See Also:
Selection Groups
Permissions Level Capabilities

Import/Update Employee, Organizational Units, Department or Site Information

TimeIPS can import Employee, Organizational Units, Department, and Site information and can also update records using the TimeIPS Import/Update Feature. The TimeIPS Employee Import and Export optional module is required.

Using the left pane Main Menu » Administration, click on: Employees » Import/Export



To Export

By exporting the employee, organizational units, department, site information, etc., you create a template file to either fill in the necessary information or rename the field labels in your existing spreadsheet of information.

1. Export the information to create a template.
   - Select a **Target**. It can be all employees, a specific employee, a site, a department, an organizational unit, or even a custom group.
   - Select the type of data to be exported, then click the **Export Data** button to generate a .csv file containing the selected information.

   TIP: To edit the resulting .csv file, we recommend a spreadsheet application such as Excel™ or OpenOffice Calc.
2. Adjust the spreadsheet as necessary.
   - If you already have a spreadsheet of the information you wish to import, open your existing spreadsheet and manipulate the column headers to match the field labels in the template you created in step 1.
   - If you do not already have a spreadsheet of the information you wish to import, enter the information into the template file you created in step 1.
3. Save the spreadsheet file of the information you wish to import as a Comma Separated (CSV) file.
   - If using Microsoft Excel, go to the File menu - Save As option. In the "Save as type" pull-down, select "CSV (Comma delimited) (*.CSV)"

   NOTE: A prompt may appear notifying you that there some features or formats may not be saved in a comma separated file. Answer "Yes" to the prompt.
4. Import the Information into TimeIPS.
   - If you make changes to the .csv file and would like those changes to take effect in TimeIPS®, use the "Employee Import/Update" function below.

To Update/Import

Use the Update/Import feature when there are a large number of changes that need to be made at one time. If you wish to create your own file instead of using an exported template, view the detailed employee, department, organizational unit or site instructions page.

1. Once the file is created, click on the **Browse** button and navigate to the CSV file to be imported.

   The following **File Requirements** must be met to import data into TimeIPS:
   - The file must be a comma separated value (CSV) file. (i.e. Excel worksheet, OpenOffice Spreadsheet, or ASCII Comma Delimited)
   - The field (column) name must be exact. You may delete columns. Columns may be in any order.
   - Blank fields WILL DELETE existing data during an update if you select "Yes" to Import/update Blank Employee Fields. If you do not want to overwrite the data, delete the column or select "No" to Import/Update Blank Fields.
2. If importing employee data, select **No** in the **Import/Update Blank Employee Fields** if you do NOT want to clear employee's data in TimeIPS if the data is blank in the import file.

   NOTE: TimeIPS will overwrite employee data with blank information ONLY if 1) the column exists in the CSV file with the correct column header, 2) the employee's data for the column is blank, and 3) Yes is selected in the "Import/Update Blank Employee Fields". This option does not apply to the Departments Import/Update.
3. Select the type of data to be imported from the **Import/Update** drop-down box.

NOTE: By default, the import identifies employees by using the employee's last, first, and middle name. The names must match exactly during an update or a new employee will be created. To make changes to an employee's name, or in cases where multiple employees have the same name, you must specify a "key" other than name. On the import page, select the employee import with an alternate key, such as SSN. When using iapi, add a key=ssn or key=badge to the parameters list to use an alternate key.

4. Click on the **Import/Update** button.

Additional NOTES: Passwords cannot be exported because they are stored in an encrypted format; however, they can be set/reset using the "Import/Update" function.

When importing Site Coverage Rules, the imported rules replace ALL existing rules for their respective sites. Coverage for sites not specified in the imported file will be unaffected.

Some fields, such as Pay Rate and Security Levels, include audit records when adjusted. The Import/Update Feature may not add audit records indicating the field was adjusted.

Custom Employee Import

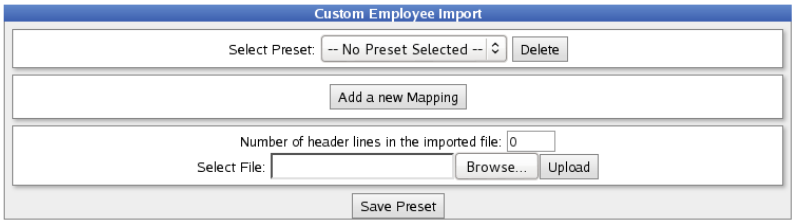
The Custom Employee Import allows you to create a preset determining how to import your data. Here you can create mappings between columns in your import and the data fields available in TimeIPS. The TimeIPS Employee Import and Export optional module is required.

Using the left pane Main Menu » Administration, click on: Employees » Import/Export

Then click on the Custom Employee Import icon

at the top of the page.

Custom Employee Import

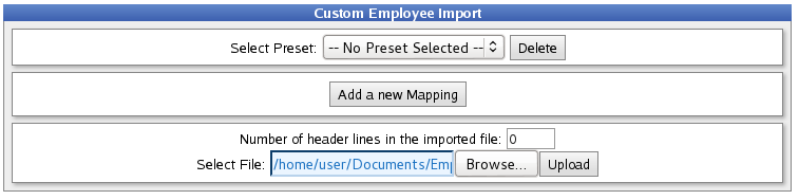


Create a Preset

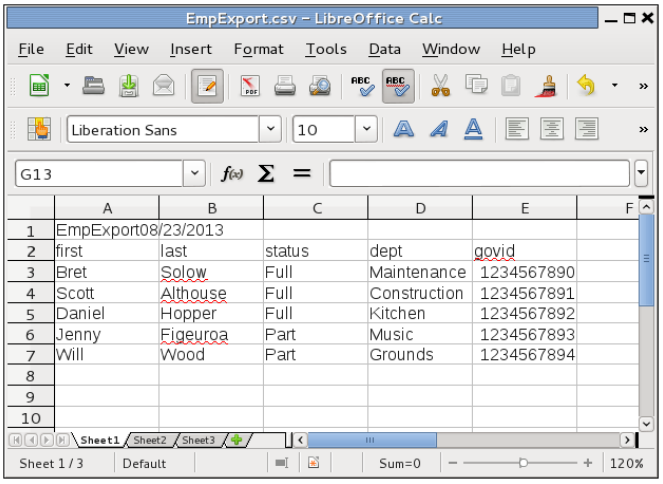
The easiest way to create a preset is to upload a file and use it as a template. The mapping can be edited, deleted, added, or simply ignored.

1. Click on the **Browse** button and navigate to the CSV file to be imported.

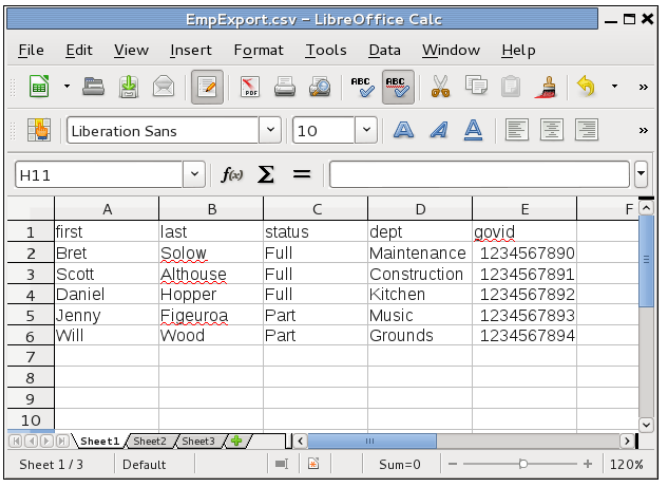
   TIP: We recommend using a spreadsheet application such as Excel™ or OpenOffice Calc to create the needed Comma Separated (CSV) file.



2. If there are any lines/rows above the header row in the file, type that number in the **Number of header lines in the imported file** box.

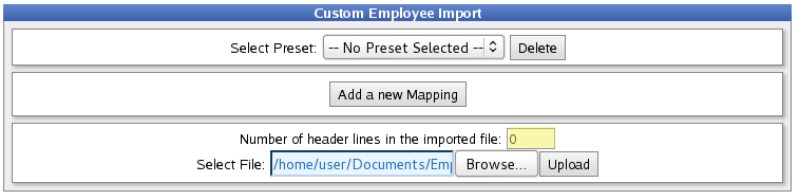


In this example, there is 1 line (which reads "EmpExport08/23/2013") being used above the header row, so enter "1" in the **Number of header lines in the imported file** box.

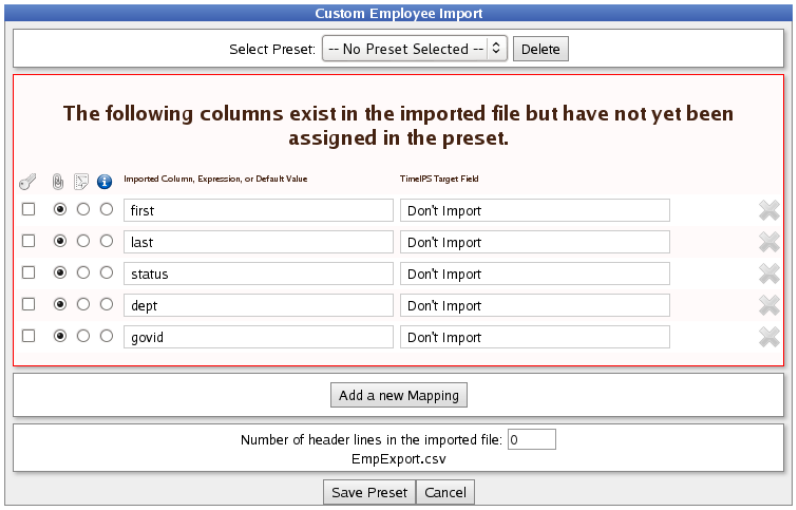


	A	B	C	D	E	F
1	first	last	status	dept	govid	
2	Bret	Solow	Full	Maintenance	1234567890	
3	Scott	Althouse	Full	Construction	1234567891	
4	Daniel	Hopper	Full	Kitchen	1234567892	
5	Jenny	Figeuroa	Part	Music	1234567893	
6	Will	Wood	Part	Grounds	1234567894	
7						
8						
9						
10						

In this example, there are no lines above the header row (which reads first, last, status, dept, govid), so enter "0" (which is the default) in the **Number of header lines in the imported file** box.

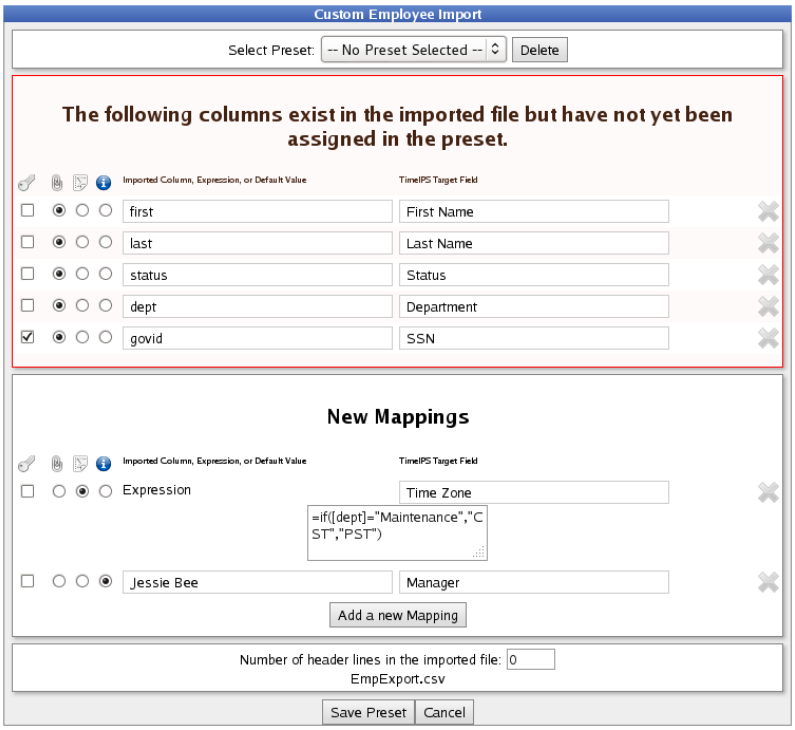


3. Click on the **Upload** button.
   - All of the columns in your import file will be displayed in the **Imported Column, Expression, or Default Value** boxes.



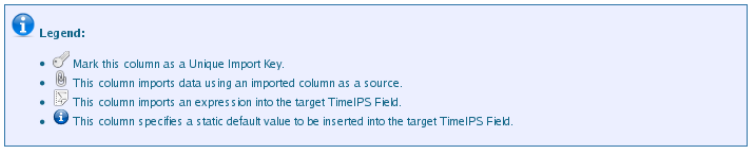
4. For each "Imported Column, Expression, or Default Value", click in the **TimeIPS Target Field** box on the right and select the corresponding target field.

NOTE: If a Target Field is left as "Don't Import", that particular header's data will be ignored and therefore not included in the import.

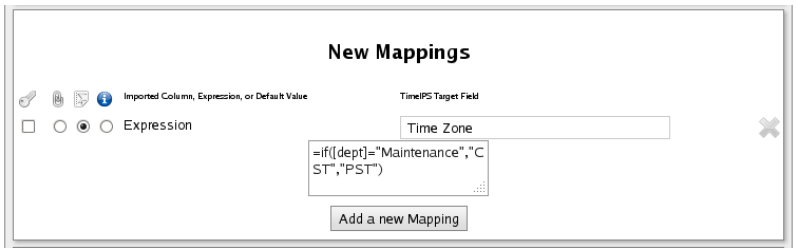


5. Designate at least one of these to be a **Unique Import Key** by checking the far left box under the key symbol. A Unique Import Key allows the system to differentiate between employees with the same name.

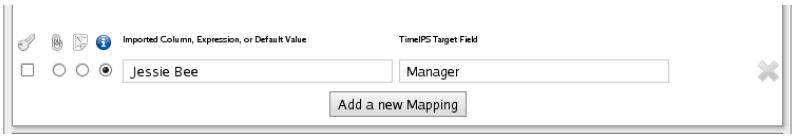
TIP: There is a legend at the top of the page explaining what the icons to the left represent.



6. (Optional) If you need to add an **Expression**, you can either **Add a new Mapping** for it or convert the corresponding Imported Column.

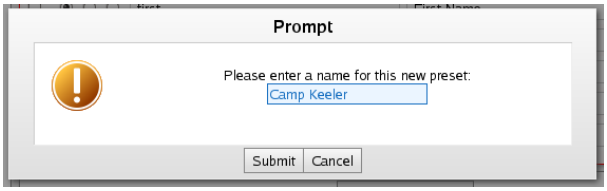


7. (Optional) If there is a header missing from the imported file that has a **Static Default Value**, you can **Add a new Mapping** for it.

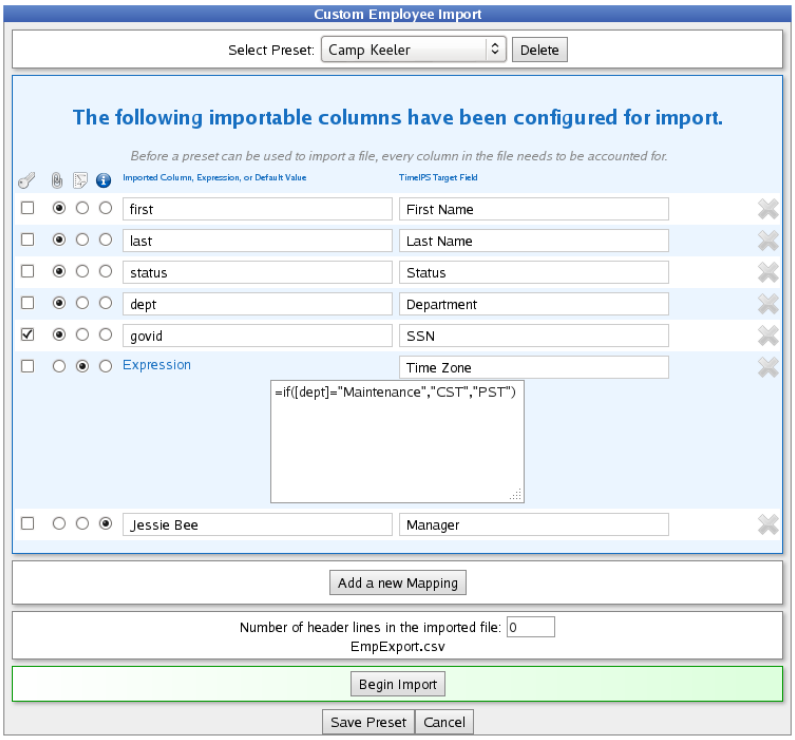


In this example of a Static Default Value, all of the employees being imported have Jessie Bee as their Manager, however Manager was not included in the file.

8. When all of the data is accounted for, click the **Save Preset** button.

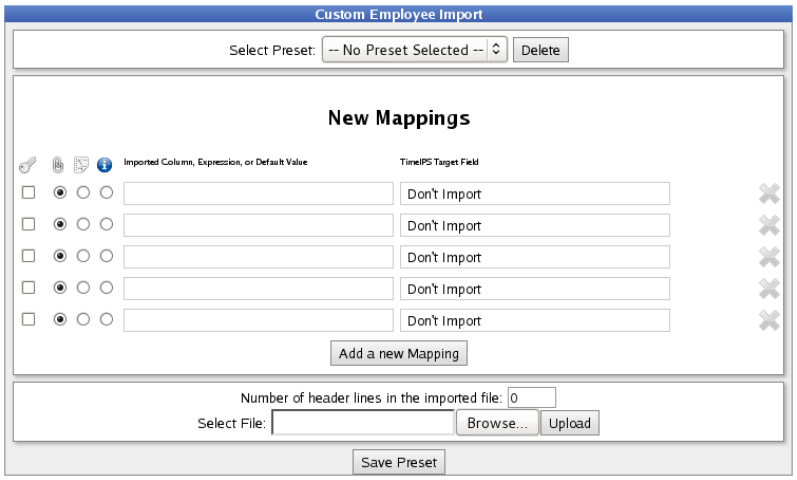


9. You will be prompted to type in the **Preset Name**, then click the **Submit** button.



If you prefer to Manually Create a Preset:

1. Click the **Add a new Mapping** button multiple times, adding a new mapping for each column.



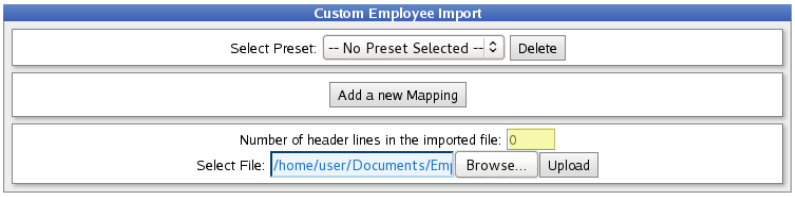
2. Type in the **Imported Columns, Expressions, and/or Default Values** in the left column of boxes and their corresponding **TimeIPS Target Fields** in the right column.
3. Designate at least one of these to be a **Unique Import Key** by checking the far left box under the key symbol. A Unique Import Key allows the system to differentiate between employees with the same name.
4. When all of the data is accounted for, click the **Save Preset** button.
5. You will be prompted to type in the **Preset Name**, then click the **Submit** button.

Import File

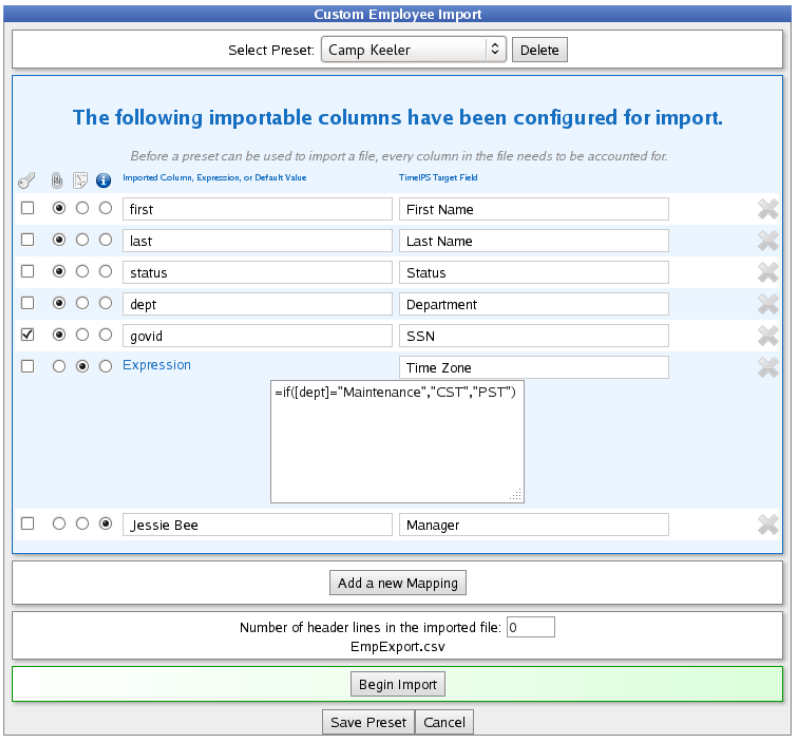
1. Click on the **Browse** button and navigate to the CSV file to be imported.

   TIP: We recommend using a spreadsheet application such as Excel™ or OpenOffice Calc to create the needed Comma Separated (CSV) file.

2. If there are any lines/rows above the header row in the file, type that number in the **Number of header lines in the imported file** box.

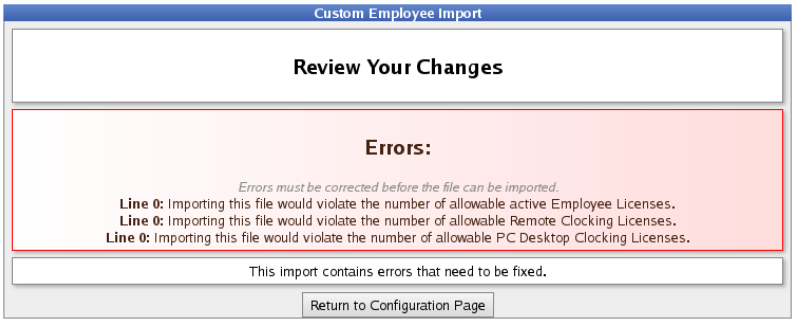


3. Click on the **Upload** button.
4. Choose a **Preset** (or follow the directions above for creating a new preset).



5. Click on the **Begin Import** button.

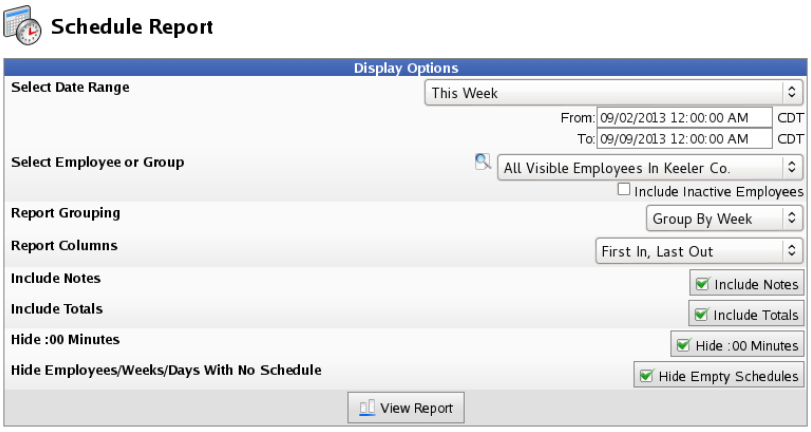
If you receive the following **Errors**, contact TimeIPS.



Schedule Report

The Schedule Report can show employee schedules in three major formats: grouped by week, grouped by employee, or grouped by day. You are also provided several additional options to customize the appearance of the report.

Using the left pane Main Menu » Administration, click on: Schedules » Schedule Report



1. Manually select a range of time for this report using the "From" and "To", or use the **Date Range** drop-down box for a quick selection.
2. **Select the Employee or Group** whose schedules you wish to view.
3. Select the **Report Grouping** format. Grouping by week will generate at least one page per week showing every selected employee. Grouping by employee will generate at least one page per employee.
4. Under **Report Columns,** select the schedule data to show for each employee's day.
5. If **Include Notes** is selected, the report will include information about the daily schedule notes for each employee.
6. If **Include Totals** is selected, an additional column and row will be added for total hours.
7. If **Hide :00 Minutes** is selected, times such as 8:00 AM will print as 8 AM.

   NOTE: This only affects times with :00 minutes. Times like 8:30 AM will always print as 8:30 AM.

8. Check the **Hide Empty Schedules** box to hide rows for employees without schedules. This will hide empty days, weeks, or entire employees depending on your selected Report Grouping setting.
9. Click the **View Report** button to create the pdf file.

Schedules and Automatic Adjustments

The Automatic Time Adjustment feature allows you to round clock in/out time and job changes, set automatic lunch deductions, and setup time snaps.

Using the left pane Main Menu » Administration, click on: Schedules » Time Adjustments

The TimeIPS system provides a mechanism for providing a few types of automatic time adjustments. These adjustments can be specified by a payroll type or can be set on a per-user basis.

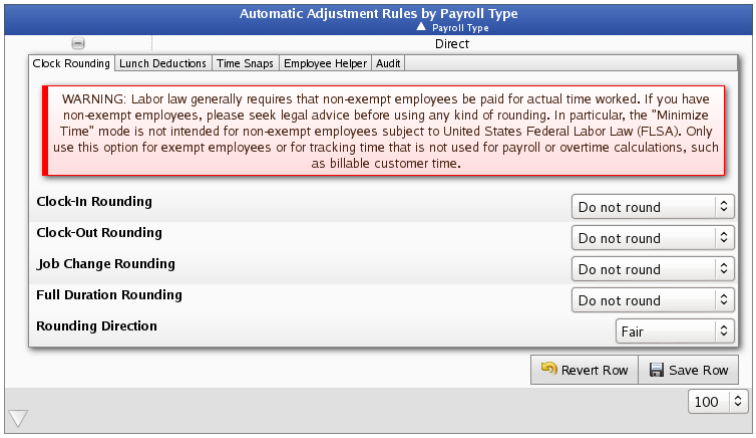
Select the **Payroll Type** or **Employee** whose schedule and automatic clock control you want to adjust.

Automatic Time Adjustment By PAYROLL TYPE

1. Click on the **+** (plus) sign to the left of the Payroll Type (shown here as "Direct").
2. Configure your **Clock Rounding**, Automatic **Lunch Deduction** or **Time Snap**.

Clock Rounding

It is possible to force an employee's punch to be rounded whenever he or she punches in or out or changes between jobs, or the employee time can be rounded based off his or her clock time duration.



- All rounding settings except **Visible Minute** and **36 sec**, round to the nearest minute. "Visible Minute" rounds all clocks down to the minute currently shown on the clock, removing seconds.

EXAMPLE: Clock-In and Clock-Out Rounding are both set to round to the nearest 15 minutes. John clocks in at 7:52 AM and 30 seconds, his clock-in time rounds to 8:00 AM. John clocks out for lunch at 11:52 AM and 29 seconds, his time rounds down to 11:45 AM.

- For **Duration Rounding**, the clock-in time will always be the actual time, but the clock-out will be adjusted such that the total duration of time will be rounded to the selected amount.

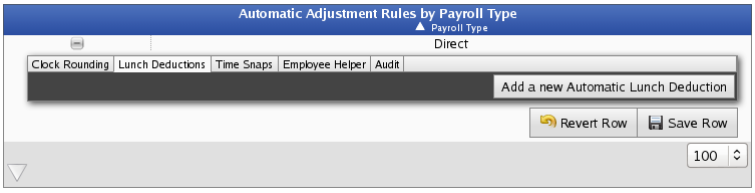
EXAMPLE: Time Rounding is set to duration round to the nearest 15 minutes. John clocks in at 7:52 AM and 30 seconds. John clocks out for lunch at 11:50 AM and 14 seconds, his time out is rounded to 11:52 AM and 30 seconds, 4:00:00 from the clock-in time.

NOTE: Duration rounding is more difficult for employees to abuse by clocking in for a few seconds and getting paid for the rounding interval. For example, with 15 minute rounding, an empolyee clocks in at 8:07:25. The In time is rounded back to 8:00:00. Then the employee clocks out a few moments later at 8:07:35. Thus, the out time is rounded to 8:15:00. the employee worked for 10 seconds, but was paid for 15 minutes. With duration rounding, the employee would need to work a minimum of 7 minutes and 30 seconds (with 15 minute rounding) to get paid 15 minutes.

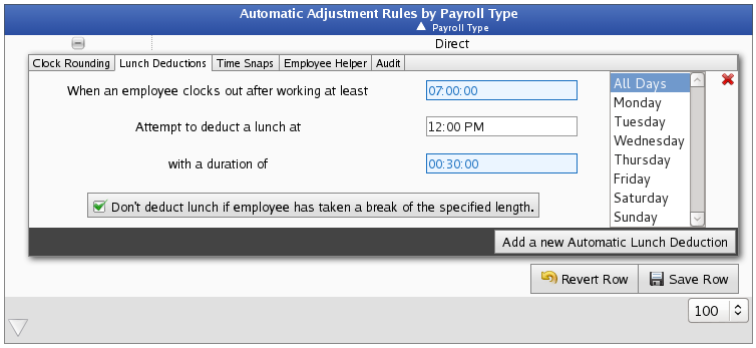
- Select the **Rounding Direction**. Fair rounding will apply a balanced "standard" mathematical rounding. Maximize Time will "round" all Clock-Ins down and Clock-Outs up, creating a longer span than actually worked. Minimize Time will "round" all Clock-Ins up and Clock-Outs down, creating a shorter span than actually worked.

Lunch Deductions

This option will automatically generate a lunch event once an employee clocks out, assuming he or she has worked the minimum specified number of hours set in the configuration. The duration of the lunch and the days of the week the rule applies can also be set. There is also an option to only force the lunch event if the employee has not taken a break equal to the specified duration.



- Click the **Add a new Automatic Lunch Deduction** button.



NOTE: TimeIPS will deduct a lunch break starting at the time specified in the "attempt to take a lunch at" for the duration entered if 1) the employee's total hours worked that day meets or exceeds the hours indicated in the "When an employee clocks out after working at least ___ hours" and 2) the employee is clocked in for the full duration of the specified lunch break.

NOTE: The employee's 24 hour work day is based on the start time of the employee's work week as defined under Schedule Day Defaults in Payroll Types.

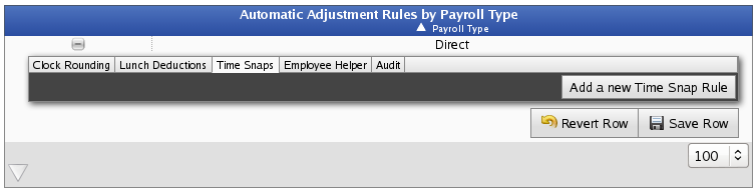
EXAMPLE: The following Automatic Scheduled Lunch Deduction is entered for hourly employees:

When an employee clocks out after working at least 7 hours, attempt to take a lunch at 12:00 PM with a duration of 30 minutes.

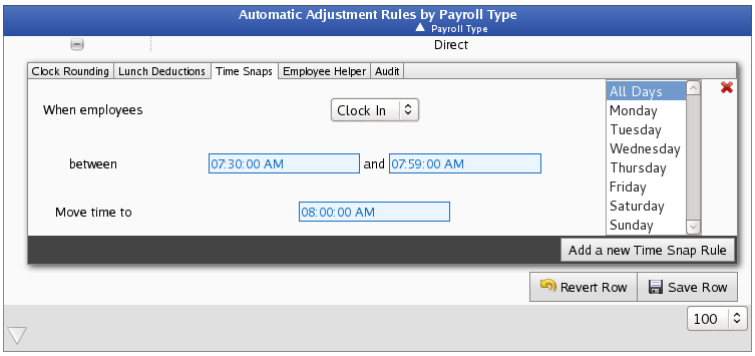
- **John clocks in at 8:00 am and clocks out at 4:30 pm. John's work day is from 12:00 am - 11:59 pm. He was on the clock for more than 7 hours in that work day and he was clocked in at 12:00 PM through 12:30 PM so the automatic lunch deduction applies.**
- **Mary clocks in at 8:00 AM and clocks out at 12:15 PM. She clocks back in at 12:45 PM and clocks out at 4:30 PM. She would not receive the automatic lunch deduction, even though she worked more than 7 hours in her work day, because she was not clocked-in for the full duration of the time the automatic lunch would have applied.**
- **Craig clocks in at 6:00 PM and clocks out at 2:00 AM the following morning. His work day is from 12:00 AM - 12:00 AM. He would not receive the automatic lunch deduction because 1) he was not clocked in the full duration of the time the automatic lunch would have applied and 2) he worked only 2 hours on the workday he clocked out (since his day ends at 12:00 AM (midnight) and he clocked out at 2:00 AM). If this is a normal shift for the employee, his settings on the Schedule tab of the employee record should be changed under the setting labeled "LCD or Large Display" this setting should be adjusted to reflect this schedule, for example, starting the week at 12:00 PM 2) he should have a custom lunch deduction that attempts to take lunch during his actual shift (for example, at 11:00 PM).**

Time Snaps

Time snaps allow precise control over how clock punches are handled. If an employees punch type matches the configured setting, and the clock event occurs between the set time span, that employee's punch can be coerced to any value as specified in the configuration, down to the second. This allows for a great amount of control over employee clock events.



- Click the **Add a new Time Snap Rule** button.



- A time snap will occur **When employees** either Clock In or Out **between** the time specified, which is then moved to the time specified under **Move time to**.

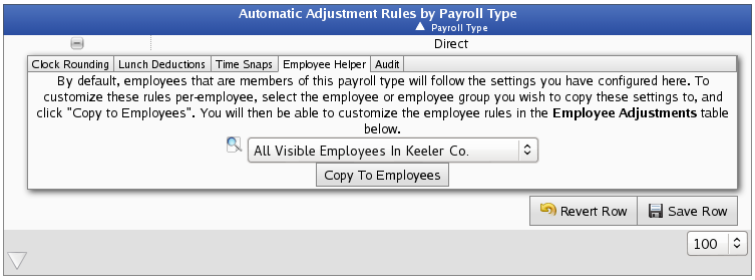
NOTE: Time Rounding is different than Time Snapping. Time Rounding applies to all of the employee's time ins and outs where as a snap affects only clock events occurring in a specified time range.

EXAMPLE: The production line starts at 8:00 AM and employees begin working. There are 100 workers and they come in between 7:30 AM and 8:00 AM. The Scheduled Time Snap should be set as follows: When employees Clock In between 7:30 AM and 7:59 AM, move time to 8:00 AM.

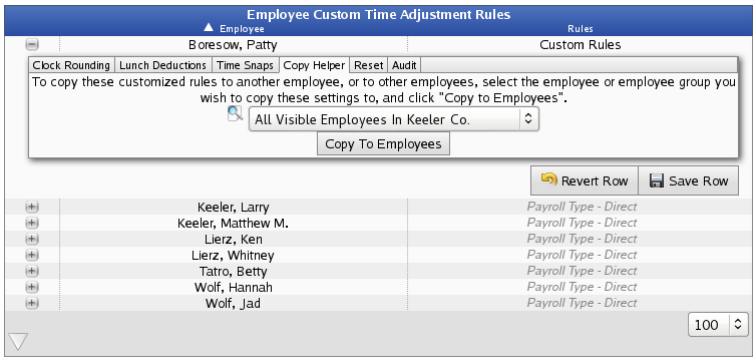
3. Click on the **Save Row** button to implement the changes.

Employee Helper

By default, employees that are members of this payroll type will follow the settings you have configured for this payroll type.

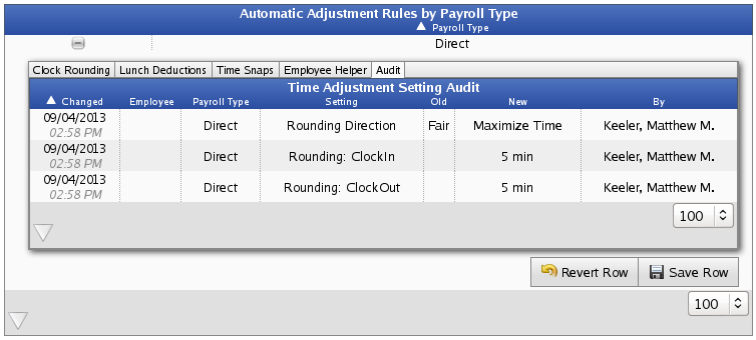


- To customize these rules per-employee, select the employee or employee group you wish to copy these settings to, and click the **Copy to Employees** button. You will then be able to customize the employee rules in the **Employee Custom Time Adjustments Rules** table below.

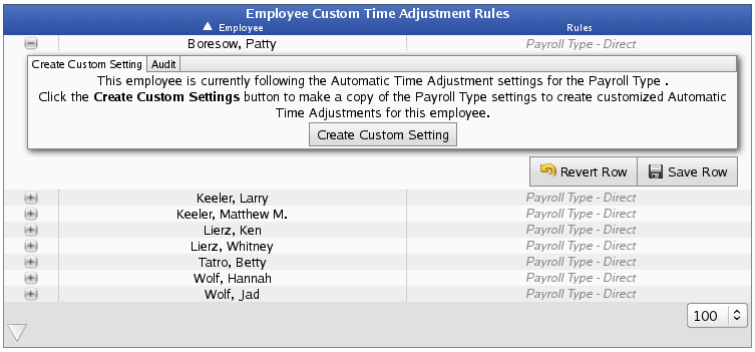


Audit (by payroll type)

This Audit shows all changes that have been made to this payroll type's Time Adjustments, the details of the change, and the Employee who made them.

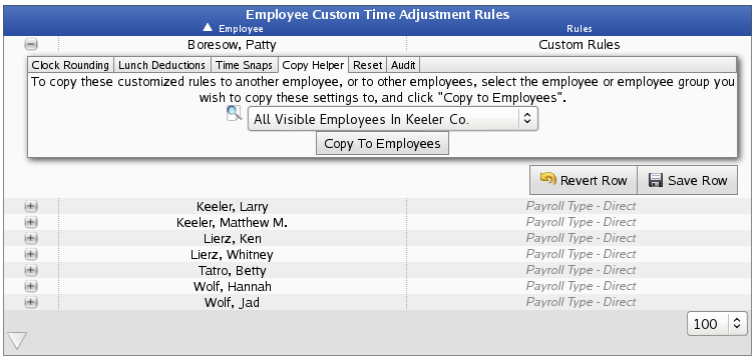


Automatic Time Adjustment By EMPLOYEE



1. Click on the **+** (plus) sign to the left of the employee's name.
2. From the **Create Custom Setting** tab, click the "Create Custom Setting" button.

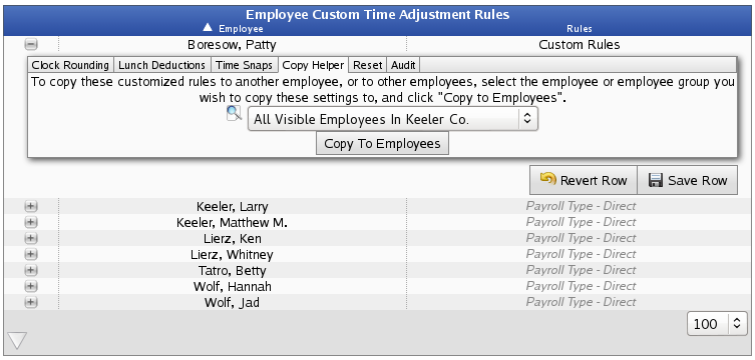
NOTE: This can also be accomplished by clicking the "Copy to Employees" button on the Employee Helper tab of the Automatic Adjustment Rules by Payroll Type table. Once either of these two actions are taken, "Custom Rules" will be listed beside the employee's name and the additional ruling tabs replace the "Create Custom Setting" tab, thus indicating the ability to then customize that employee's rules.



3. Configure the **Clock Rounding**, Automatic **Lunch Deduction** and/or **Time Snap** in the same way as described previously for payroll type.
4. Click on the **Save Row** button to implement the changes.

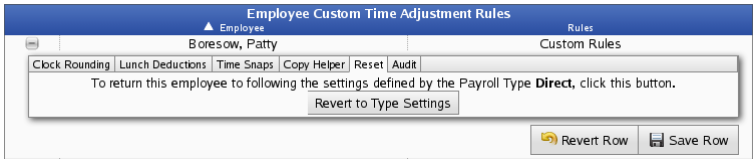
Copy Helper

To copy customized rules from one employee to another employee(s), go to the customized employee's **Copy Helper** tab and select the employee or employee group you wish to copy these settings to, and then click the **Copy to Employees** button.



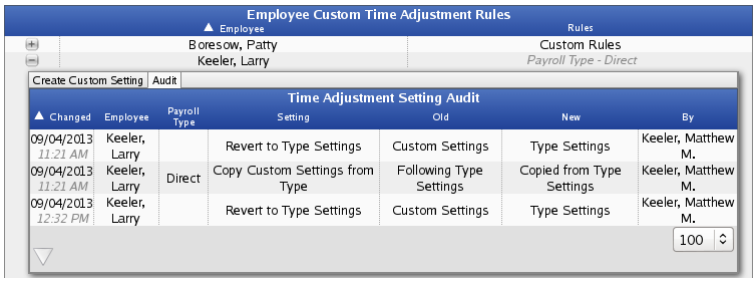
Reset

To return an employee to following the settings defined by Payroll Type, click the **Revert to Type Settings** button on the **Reset** tab.



Audit (per employee)

This Audit shows all changes that have been made to this employee's Time Adjustments, the details of the change, and the Employee who made them.



Audit (for all employees)

The Time Adjustment Setting Audit shows all changes that have been made to Time Adjustments, the details of the change, and the Employee who made it.

- Access this Audit by clicking on the **Audit** icon at the top of the page.

Audit

Time Adjustment Setting Audit

Changed	Employee	Payroll Type	Setting	Old	New	By
09/04/2013 11:21 AM	Keeler, Matthew M.		Revert to Type Settings	Custom Settings	Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Backup, Joey	Direct	Copy Custom Settings from Type	Following Type Settings	Copied from Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Backup, Joey		Revert to Type Settings	Custom Settings	Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Wolf, Hannah	Direct	Copy Custom Settings from Type	Following Type Settings	Copied from Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Wolf, Hannah		Revert to Type Settings	Custom Settings	Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Wolf, Jad	Direct	Copy Custom Settings from Type	Following Type Settings	Copied from Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Wolf, Jad		Revert to Type Settings	Custom Settings	Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Boresow, Patty	Direct	Copy Custom Settings from Type	Following Type Settings	Copied from Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Boresow, Patty		Revert to Type Settings	Custom Settings	Type Settings	Keeler, Matthew M.
09/04/2013 11:21 AM	Lierz, Ken	Direct	Copy Custom Settings from Type	Following Type Settings	Copied from Type Settings	Keeler, Matthew M.

Internal Information (visible to Administrators only):

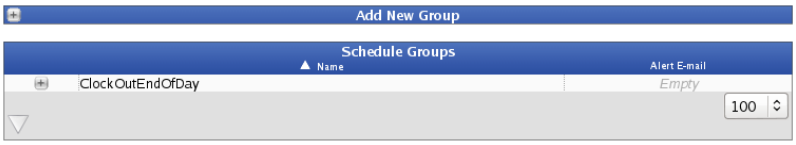
"Visible Minute" rounds all clocks down to the minute currently shown on the clock, removing seconds.

Schedule Groups

Schedule Groups provide automatic clocking functions that allow you to set up clock events to occur at a specific time. Requires the IPSSCH module.

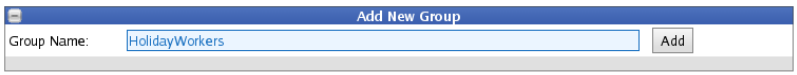
Using the left pane Main Menu » Administration, click on: Schedules » Schedule Groups

Schedule Groups

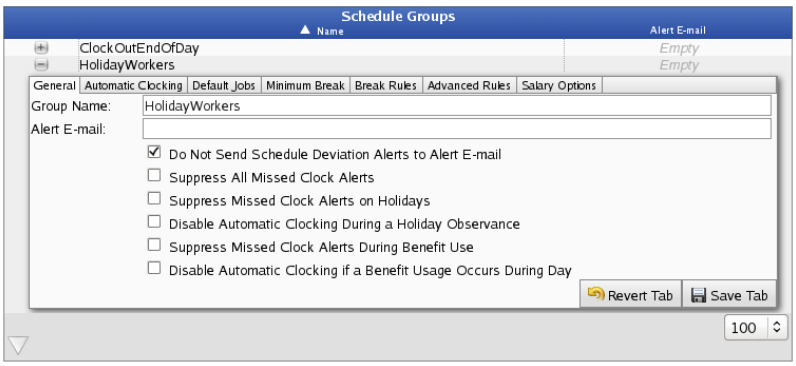


Add a Schedule Group

1. Click the **+** (plus) sign on the left hand side of the **Add New Group** bar.



2. Enter the Schedule **Group Name** and click on the **Add** button.
3. The Schedule Group record will be created and will open to the **General** tab of the **Schedule Groups** table.

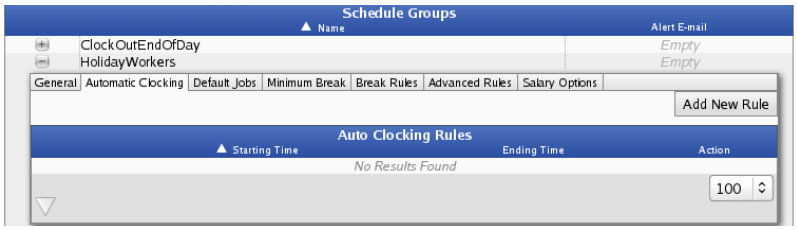


4. Enter the **Alert E-Mail** address of the person who should be notified when a schedule group violation or automatic clock event occurs for any member of this group.

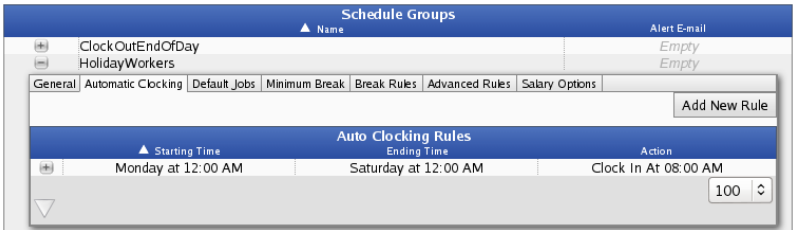
NOTE: If a group of employees will be automatically clocked in and out every day, e-mail alerts of this would not be necessary. However, if employees deviate from the Minimum Break rule or are clocked into a job that earns a higher pay rate or that tracks a shift premium, an e-mail alert could be very useful.

Set up Automatic Clocking rules

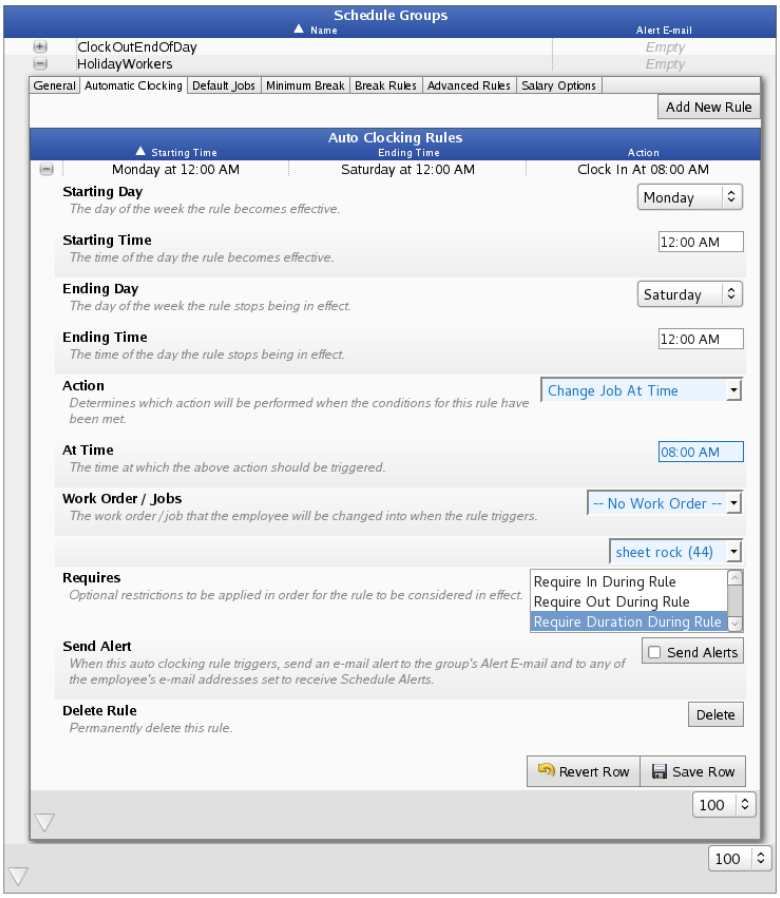
1. If not already open, expand the **Schedule Group** record you want to edit by clicking on the **+** (plus) sign next to the Schedule Group name.
2. Click on the **Automatic Clocking** tab.



3. Click on the **Add New Rule** button.



4. Click the **+** (plus) sign to the left of the new entry .



5. Select the day and time when the automatic clock event should **Start** and **End** from the drop-down boxes.

NOTE: The start time is INCLUSIVE, so that a rule that starts at 12:00 AM can have an action at 12:00 AM, but the end time is EXCLUSIVE so you must set it to include at least one minute after the desired action.

---

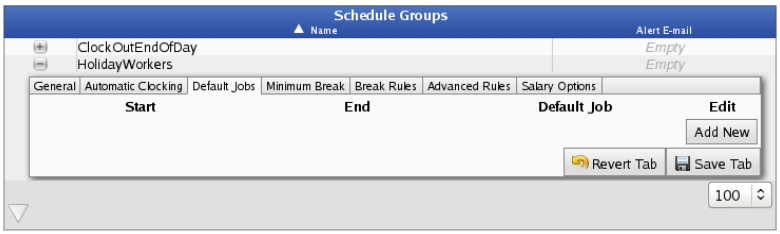
6. Select the **Action** you want taken. Your options are:
   - **Clock In at Time** - In the **At Time** field, enter the time employees in this group should be automatically clocked in.
   - **Clock Out at Time** - In the **At Time** field, enter the time employees in this group should be automatically clocked out.
   - **Clock Out After Duration** - In the **After Duration** field, enter the number of hours and/or minutes (HH:MM) to wait before automatically clocking the employee out.
   - **Change Job at Time** - In the **At Time** field, enter the time employees in this group should be automatically clocked into the job specified in **Work Order/Jobs**. Select the job and/or work order from the drop-down lists.
   - **Change Job After Duration** - In the **After Duration** field, enter the number of hours and/or minutes (HH:MM) after the last clock in to automatically clock the employee into the job specified in **Work Order/Jobs**. Select the job and/or work order from the drop-down lists.
7. Under **Requires**, you can choose optional restrictions to be applied in order for the rule to be considered in effect. Optional restrictions include: Require In During Rule, Require Out During Rule, and Require Duration During Rule.
8. Check the **Send Alerts** checkbox if you want to have an e-mail sent to the alert e-mail address (set up on the General tab) whenever a particular clock rule is used.
9. Click the **Save Row** button to save changes made to the rule.
10. If you wish to permanently delete this rule, click on the **Delete** button.

NOTE: The employee's "default job" is assigned to them on the Employment tab in Employee Administration.

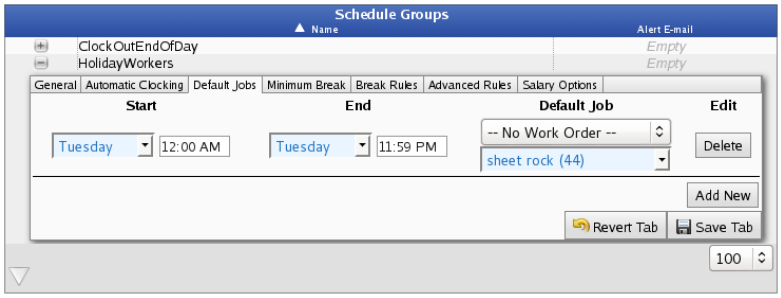
NOTE: Automatic clock rules are not necessarily linear unless you configure them as such. For instance, a rule that says to "Clock Out After" 4 hours, will be applied anytime the employee clocks in, including when they clock back in from lunch. So if you want them to clock out or change jobs at a different time, use the "Clock Out At" or "Change Jobs At" functions instead.

Set up Default Jobs

1. If not already open, expand the **Schedule Group** record you want to edit by clicking on the **+** (plus) sign next to the Schedule Group name.
2. On the **General** tab, enter the **Alert E-Mail** address of the person who should be notified when a schedule violation occurs for this group.
3. Click on the **Default Jobs** tab.



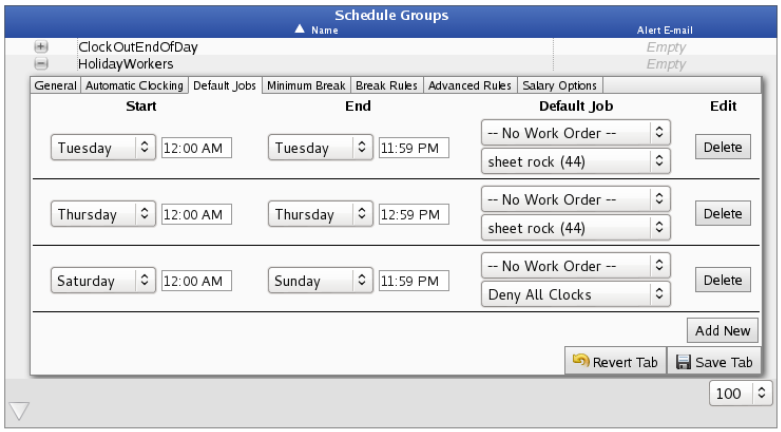
4. Click on the **Add New** button.



5. Select the day and time when the default job rule should **Start** and **End** from the drop-down boxes.
6. Select the **Default Job** (with or without a Work Order) the employee should be clocked into between the Start and End times.
   - OR -
   Select **Deny All Clocks** - If an employee in this schedule group attempts to clock in or change jobs between the start and end times, their clock will be denied.

NOTE: If an alert e-mail has been set up on the General tab for this schedule group, an e-mail message will be sent to the alert e-mail address to advise of the attempted clock-in.

7. Click the **Save Tab** button to keep these changes.



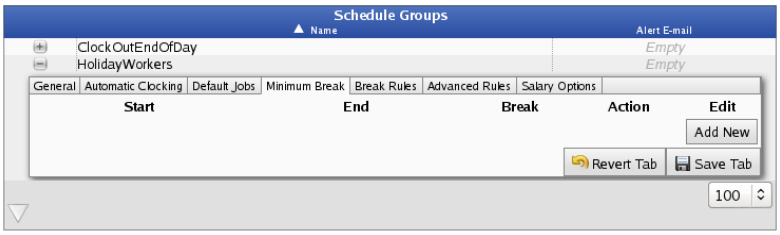
EXAMPLE: In the example above, employees in the "HolidayWorkers" schedule group are clocked into the job "sheet rock" on Tuesday's and Thursday's between 12:00am and 11:59pm whenever they clock in or change jobs and do not specify a particular job. Also, employees in this schedule group are not permitted to clock-in between Saturday at 12:00am and Sunday at 11:59pm.

NOTE: Default Jobs do not work simultaneously with Automatic Clocking rules. When applying Automatic Clocking rules, the "default job" employees are automatically clocked into is the job that is assigned to them on their Employment tab in Employee Administration. However, when applying Default Job rules, the selected "default job" is assigned to employees in the schedule group only between the start and end times of the specified rule.

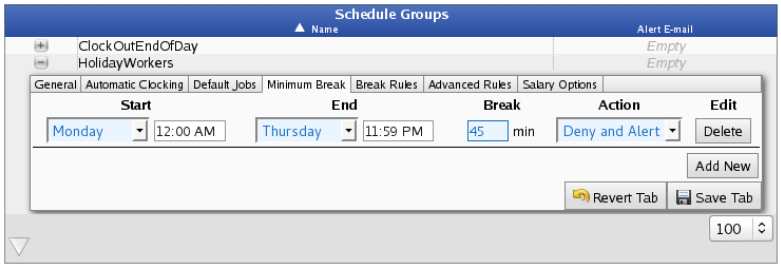
8. Click on the **Delete** button to remove a Default Job rule.

Set up Minimum Break rules

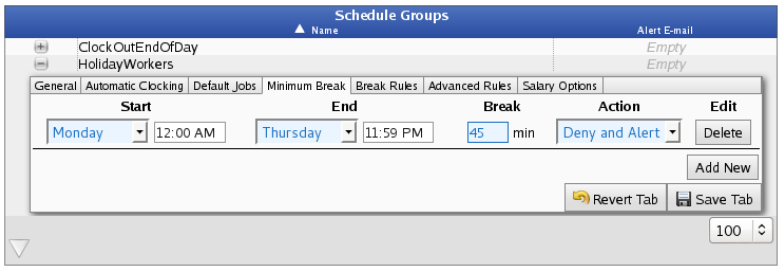
1. If not already open, expand the **Schedule Group** record you want to edit by clicking on the **+** (plus) sign next to the Schedule Group name.
2. Click on the **Minimum Break** tab.



3. Click on the **Add New** button.



4. Select the day and time when the Minimum Break rule should **Start** and **End** from the drop-down boxes.
5. Enter the minimum amount of time (in minutes) the **Break** should last.
6. Select the **Action** you want taken. Your options are:
   - **Deny and Alert** - With this option selected, if the employee attempts to clock back in before the minimum amount of time has elasped, their clock will be denied and an e-mail alert will be sent to the e-mail address entered on the General tab of this schedule group.
   - **Deny** - With this option selected, if the employee attempts to clock back in before the minimum amount of time has elasped, their clock will be denied, but an e-mail alert will not be generated.
7. Click the **Save Tab** button to keep these changes.

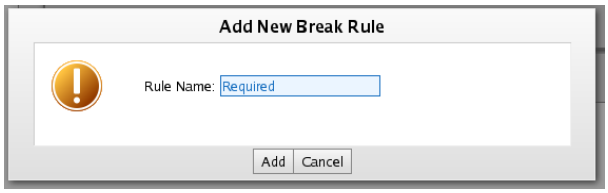


EXAMPLE: In the example above, "HolidayWorkers" employees are required to clock out for at least 45 minutes Monday through Thursday and for at least 30 minutes on Friday. On Monday through Thursday, if an employee attempts to clock in before the mininum amount of time has elapsed, the clock will be denied and an alert e-mail will be generated. On Fridays, the clock will be denied, but an alert e-mail will not be generated.

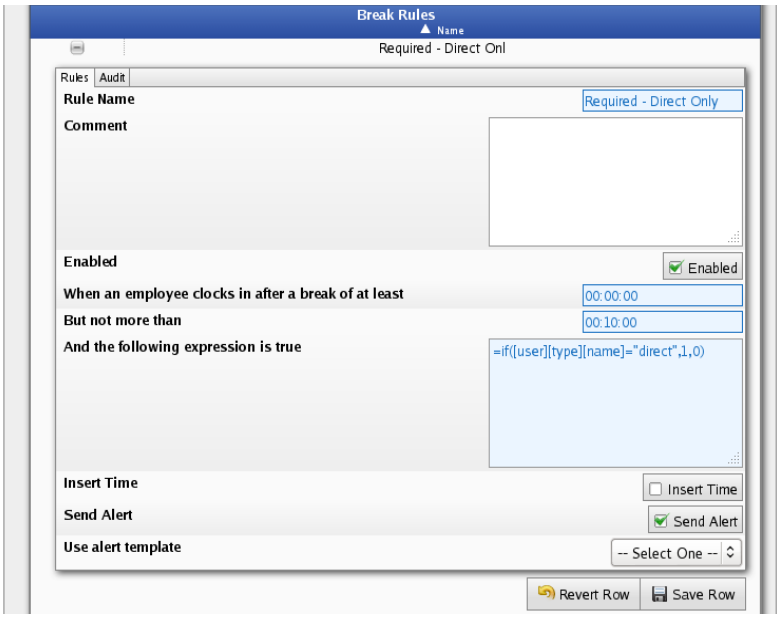
Set up Break Rules

1. If not already open, expand the **Schedule Group** record you want to edit by clicking on the **+** (plus) sign next to the Schedule Group name.
2. Click on the **Break Rules** tab.

3. To **Show Inactive Break Rules**, check the box.
4. Click on the **Add New Break Rule** button.



5. Type in the **Rule Name** and click the **Add** button.



6. You can then edit the **Rule Name**.
7. Add an optional brief comment about this rule in the **Comment** field.
8. Check the **Enabled** box to enable this break rule. Uncheck to disable the rule.
9. Add a minimum inclusive qualifying time of a break to trigger this rule in the **"When an employee clocks in after a break of at least"** box.
10. Add a maximum inclusive qualifying time of a break to trigger this rule in the **"But not more than"** box.
11. In the "**And the following expression is true**" field, you can add an optional expression that, if set, must evaluate to true for the rule to trigger.

NOTE: Expressions allow you to customize the application of Break Rules. For example you can have one schedule group for all employees and use custom logic based on Pay Type to determine if the rule should fire.

View a list of the Break Rules Expression Variables.

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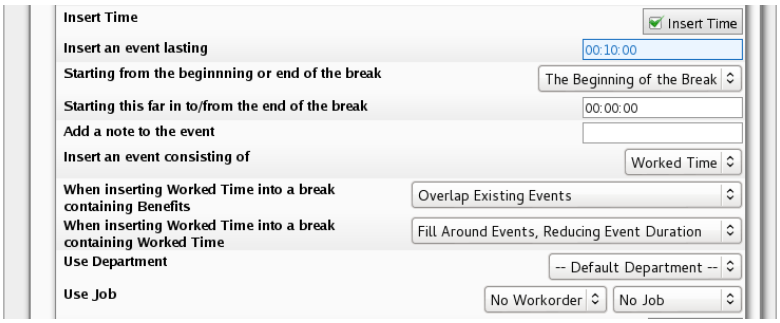
12. If the system should insert an event during the break, check the **Insert Time** box. The following additional options will then be made available.



- **Insert an event lasting** HH:MM:SS. This is the maximum duration of the inserted event up to the length of the break.
- **Starting from the beginnning or end of the break.** Choose whether the inserted event should start at "The Beginning of the Break" or some time offset in from "The End of the Break".
- **Starting this far in to/from the end of the break** defines an offset value used to start the event at different points during the break.
- **Add a note to the event** that is either the clock in note or the benefit note asociated with the inserted event.
- **Insert an event consisting of** either "Worked Time" or "Benefits".
- **When inserting Worked Time into a break containing Benefits**, it can either "Overlap Existing Events", "Fill Around Events, Reducing Event Duration", or "Fill Around Events, Maintaining Event Duration".

NOTE: Overlap will insert the event ignoring the benefits. Alternatively the system can insert an event in pieces working around existing benefits. In this latter mode you must choose whether or not to preserve the duration of the inserted event.

For EXAMPE: If we choose to insert a one hour event but a 30 minute benefit usage is in the middle of our span then we can either insert 30 minutes on either side of the benefit usage (preserving the one hour duration) or we can insert 15 minutes on either side, ensuring the one hour window is filled with some kind of event.

- **When inserting Worked Time into a break containing Worked Time** it can either "Fill Around Events, Reducing Event Duration" or "Fill Around Events, Maintaining Event Duration". NOTE: This might happen if there are multiple break rules configured and one has already inserted worked time during the break. The system can insert an event in pieces working around existing time. You must choose whether or not to preserve the duration of the inserted event.
- **Use Department** if appropriate for the type of event. If you choose default department then it will use the employee's default at the time of processing.
- **Use Job** designates which Work order and which Job are used when filling the break.

13. If someone should be notified of this event, check the **Send Alerts** box. When the rule is triggered, the system will then notify everyone that is configured to receive Schedule Alerts for the

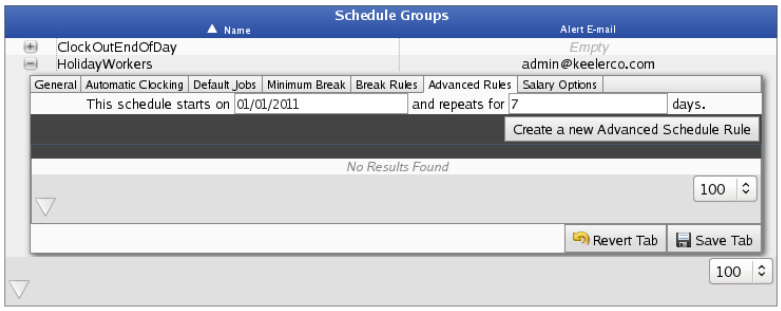
employee.
14. If the Send Alerts box is checked, you will then have the option to **Use an alert template**.
15. Click the **Save Row** button to implement the rule.

Advanced Rules

The IPSASH Advanced Schedule module extends the IPSSCH Schedule module to allow multiple complex rules with conditions, actions and repeat/date ranges. See the ***IPSASH Advanced Schedules*** *article for detailed instructions.*

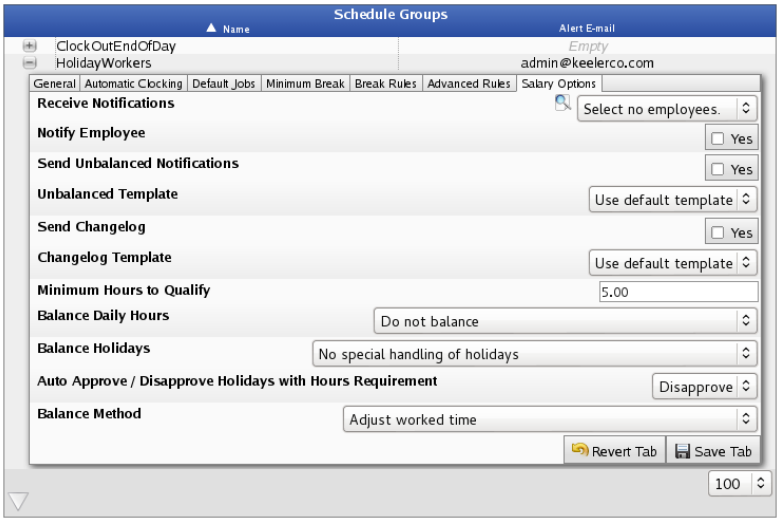
Advanced Schedules allow automatic handling of a wide variety of situations and add great flexibility to the TimeIPS system. This same flexibility can make creating rules, conditions and actions challenging. Rules can be configured that are valid, but cause unexpected results, such as an action that makes another rule take an action causing the first rule to take an action again. This can create a "loop" where an employee is clocked in/out, changes jobs, uses benefit time, etc., over and over.

We recommend carefully testing and validating rules and/or consulting with TimeIPS technical support when creating and configuring your rules.



Set up Salary Options

1. If not already open, expand the **Schedule Group** record you want to edit by clicking on the **+** (plus) sign next to the Schedule Group name.
2. Click on the **Salary Options** tab.



3. Configure the following necessary terms.
   - Select the employee to **Receive Notifications** of unbalanceable days and/or a summary of the changes performed.
   - If the employee should receive a copy of any alerts sent, check the YES box next to **Notify Employee**.
   - To generate a notification if an employee's day is unable to be balanced, check the YES box next to **Send Unbalanced Notifications**.
   - If you have and want to use a customized email template to generate the Unbalanced Notification, choose it from the **Unbalanced Template** drop-down box.
   - To provide a detailed list of all changes performed to balance an individual's time, check the YES box next to **Send Changelog**.
   - If you have and want to use a customized email template to generate the Changelog, choose it from the **Changelog Template** drop-down box.
   - Set the minimum number of hours an employee must have allocated to qualify for normal adjustments as specified by your settings below.

     NOTE: If the employee has less hours than the minimum, all working hours are truncated, and if the below balancing method allows for benefit time, only benefit time will be used to adjust upwards. No work time will be granted if an employee is under the minimum to qualify, or if the benefits run out.

   - Decide if and when an employee's daily hours should be balanced.
     - If "Balance once at the end of each schedule day" is chosen from the **Balance Daily Hours** drop-down box, you will need to choose the **Effective Date**.
     - If "Always balance over the last specified number of days" is chosen, you will need to choose the **Effective Date** and **The number of days to retroactively balance**.
   - Choose whether or not to **Balance Holidays**.
   - Choose to **Auto Approve / Disapprove Holidays** if a holiday requires adjacent days before or after to be worked, or requires a minimum amount of hours to have been worked.
   - Choose the **Balance Method** through which daily hours will be adjusted, if necessary.

4. Click the **Save Tab** button to implement the changes.

Internal Information (visible to Administrators only):

When setting up Auto Clocking, the duration requirement does not work.

Also note that when clocking at time, that time needs to be within the range of the auto clock check.

Schedule Groups Break Rules Expression Variables

This article explains the purpose of expressions in Schedule Group Break Rules and provides the available configuration options.

Schedule Group Break Rules

Schedule Groups have a feature called Break Rules which allows for many automated actions when an employee comes back from a break.

Purpose of Expressions

Expressions allow you to customize the application of Break Rules. For example you can have one schedule group for all employees and use custom logic based on Organizational Unit to determine if the rule should fire.

Format of Expressions

Expressions must start with an equals sign '='. They provide a single line of code that is evaluated and reduced down to either TRUE or FALSE. If the expression evaluates to TRUE then it is valid and the break rule can be triggered. If it is FALSE then the break rule will not be triggered.

Supported Functions

Break Rule expressions utilize the same expression parser as Custom Reports. As such the same functions are avaiable. The list of functions is available at this article.

Available Variables

The following information is available. Variable names are case sensitive.

Variable Outline	Full Variable Name	Description
breakStart	[breakStart]	This is the Unix Timestamp of the last clock out which is the beginning of the break. Convert this with the utcdate function.
breakEnd	[breakEnd]	This is the Unix Timestamp of the new clock in which is the end of the break. Convert this with the utcdate function.
user	[user]	This variables itself has no value to expressions. It serves as the starting point for multi-dimensional variables that contain more information about this employee.
usersID	[user][usersID]	This is the unique database ID assigned to this employee by TimeIPS. This will always be unique among all employees in the system.
nameFirst	[user][nameFirst]	The employee's first name
nameLast	[user][nameLast]	The employee's last name
nameMid	[user][nameMid]	The employee's middle name if provided.
namePref	[user][namePref]	The employee's preferred name if provided
HID	[user][HID]	The employee's badge number
type	[user][type]	Starting point for information about the employee's payroll type.
typeID	[user][type][typeID]	A unique database ID assigned to this payroll type.
name	[user][type][name]	The name of the employee's payroll type.
timing_frame	[user][type][timing_frame]	An indicator about the payroll frequency of this payroll type. Possible values are 'week', 'biweek', 'month', 'bimonth', and '4-4-5'
code	[user][type][code]	An arbitrary payroll code associated with this payroll type.
orgUnit	[user][orgUnit]	Starting point for the employee's organizational unit
organizationalUnitID	[user][orgUnit][organizationalUnitID]	A unique database ID for this unit
name	[user][orgUnit][name]	The name of this unit
code	[user][orgUnit][code]	An arbitrary code associated with this unit
scheduleGroup	[user][scheduleGroup]	Starting point for this employee's schedule group
schedGroupID	[user][scheduleGroup][schedGroupID]	Unique database ID.
name	[user][scheduleGroup][name]	The name of this schedule group
defaultDepartment	[user][defaultDepartment]	Starting point for information about this employee's default department
departmentID	[user][defaultDepartment][departmentID]	A unique database ID
name	[user][defaultDepartment][name]	The name of this employee's default department
shortName	[user][defaultDepartment][shortName]	The abbreviated name of this department
ctrlNum	[user][defaultDepartment][ctrlNum]	An arbirtrary control number for this department
code	[user][defaultDepartment][code]	The code for this department. This is the code employees might type at the clock
subCode	[user][defaultDepartment][subCode]	An optional subcode for this department
glNum	[user][defaultDepartment][glNum]	An optional G.L. Number for this department.
altNum	[user][defaultDepartment][altNum]	An optional alternate number used by this department
trackTime	[user][defaultDepartment][trackTime]	Either a 1 or 0 if this department is tracked against worked time
trackBenefits	[user][defaultDepartment][trackBenefits]	Either a 1 or 0 if this department is tracked against benefits
trackHolidays	[user][defaultDepartment][trackHolidays]	Either a 1 or 0 if this department is tracked against holidays

trackPiecework	[user][defaultDepartment][trackPiecework]	Either a 1 or 0 if this department is tracked against piecework
defaultWorkOrder	[user][defaultWorkOrder]	Starting point for information about the employee's default work order
workOrderID	[user][defaultworkOrder][workOrderID]	A unique database ID about this work order
name	[user][defaultworkOrder][name]	The name of this work order
lcdName	[user][defaultworkOrder][lcdName]	The abbreviated name of this work order
code	[user][defaultworkOrder][code]	The code to identify the work order
poNum	[user][defaultworkOrder][poNum]	A P.O. number associated with the work order
dateStart	[user][defaultworkOrder][dateStart]	The date work on this work order is intended to begin
dateDue	[user][defaultworkOrder][dateDue]	The due date of this work order
note	[user][defaultworkOrder][note]	A note associated with this work order
customer	[user][defaultworkOrder][customer]	A starting point for information about the customer on this work order
custID	[user][defaultworkOrder][customer][custID]	This customer's unique database ID
name	[user][defaultworkOrder][customer][name]	The name of this customer
addr1	[user][defaultworkOrder][customer][addr1]	The first line in this customer's address
addr2	[user][defaultworkOrder][customer][addr2]	The second line in this customer's address
city	[user][defaultworkOrder][customer][city]	The city for this customer's address
state	[user][defaultworkOrder][customer][state]	The state for this customer's address
zip	[user][defaultworkOrder][customer][zip]	The zip code for this customer's address
phone	[user][defaultworkOrder][customer][phone]	The phone number on this customer
fax	[user][defaultworkOrder][customer][fax]	The fax number on this customer
defaultJob	[user][defaultJob]	Starting point for information about this customer's default job
jobID	[user][defaultJob][jobID]	The unique database ID associated witht his job
lcdName	[user][defaultJob][lcdName]	The shortened name of this job
code	[user][defaultJob][code]	The job code used to clock in to this job
name	[user][defaultJob][name]	The name of the job
ctrlNum	[user][defaultJob][ctrlNum]	A control number associated with the job
billingRate	[user][defaultJob][billingRate]	A billing rate associated with the job
glNum	[user][defaultJob][glNum]	A G.L. number for the job
description	[user][defaultJob][description]	Any description provided about the job
subCode	[user][defaultJob][subCode]	An arbitrary sub code identifier for the job
altNum	[user][defaultJob][altNum]	The job's alternate number
customer	[user][defaultworkOrder][customer]	A starting point for information about the customer on this work order
custID	[user][defaultworkOrder][customer][custID]	This customer's unique database ID
name	[user][defaultworkOrder][customer][name]	The name of this customer
addr1	[user][defaultworkOrder][customer][addr1]	The first line in this customer's address
addr2	[user][defaultworkOrder][customer][addr2]	The second line in this customer's address
city	[user][defaultworkOrder][customer][city]	The city for this customer's address
state	[user][defaultworkOrder][customer][state]	The state for this customer's address
zip	[user][defaultworkOrder][customer][zip]	The zip code for this customer's address
phone	[user][defaultworkOrder][customer][phone]	The phone number on this customer
fax	[user][defaultworkOrder][customer][fax]	The fax number on this customer
category	[user][defaultJob][category]	Starting point for information about this job's category
catID	[user][defaultJob][category][catID]	A unique database ID for this category
name	[user][defaultJob][category][name]	The name of the category
descr	[user][defaultJob][category][descr]	A description about this job category
code	[user][defaultJob][category][code]	A code associated with this job category

manager	[user][manager] *?	This is the employee's manager. There is another complete set of variables for the manager starting where this list startes with 'user'. For example to get this employee's manager's name you could use [user][manager][nameFirst] If the manager has a manager above them then they will also have a manager entry at [user][manager][manager] and so on.

Internal Information (visible to Administrators only):

Note: There are several additional variables available (basically anything that's in the database).

See Also:
Supported Functions For Advanced Expressions

IPSASH Advanced Schedules

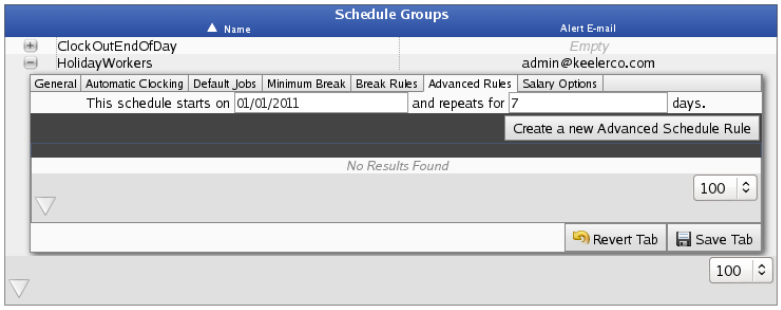
The Advanced Schedule system allows creating one or more rules for a schedule group.

The IPSASH Advanced Schedule module extends the IPSSCH schedule module to allow multiple complex rules with conditions, actions and repeat/date ranges.

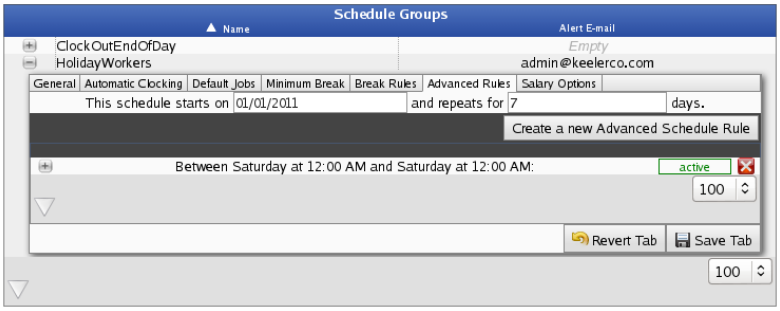
Using the left pane Main Menu » Administration, click on: Schedules » Schedule Groups

Set up Advanced Rules

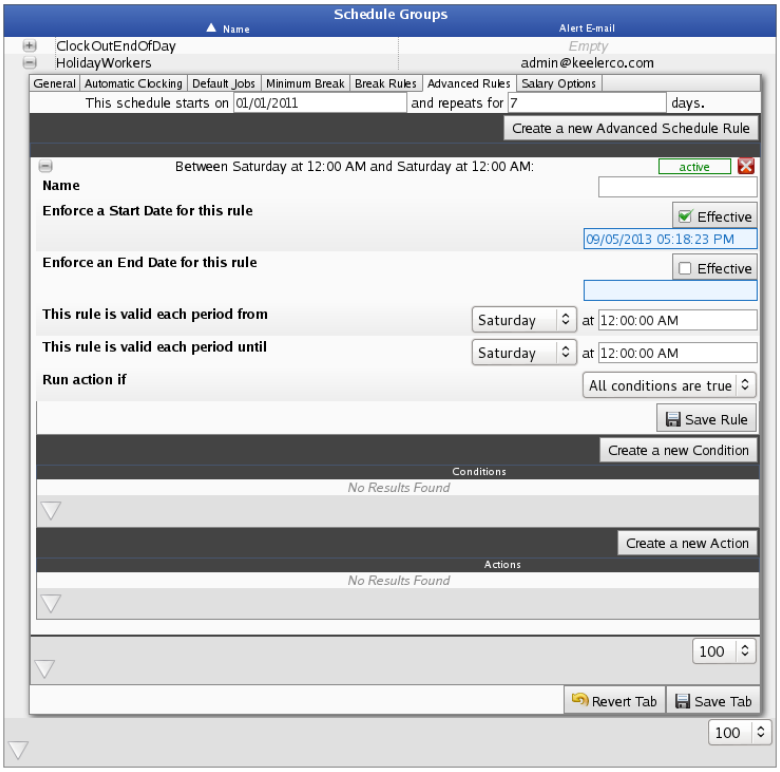
1. If not already open, expand the **Schedule Group** record you want to edit by clicking on the **+** (plus) sign next to the Schedule Group name.
2. Click on the **Advanced Rules** tab.



3. Select a starting date for this schedule group.
4. If the rule applies every day, enter 1 after "**and repeats every**". For a weekly schedule, enter 7.
5. Click on the **Create a new Advanced Schedule Rule** button.



6. Click on the **+** (plus) sign to the left of the new rule to expand the window and set up the terms.



RULES can apply for all time, up to a set date, after a set date, or only between specified dates.

7. Enter a **Name** to help differentiate this rule from others.
8. To **Enforce a Start Date for this rule**, check the **Effective** box and select a start date and time in the field below it.
9. To **Enforce an End Date for this rule**, check the **Effective** box and select an end date and time in the field below it.
10. Within the repeat cycle, the rule may only apply on certain days and/or for certain times. Select the time frame **This rule is valid each period from** one day of the week and time **until** another day of the week and time. To have the rule valid for the entire time each cycle, set the "from:" to the first day at 12:00:00 am (midnight) and the "until" to the first day at 12:00:00 am again.

NOTE: 7-day repeating schedules will show days of the week, where as all other repeating schedules show a generic "day 1, day 2, etc". As a default, the day of the week shown is the same as the schedule start date.

For example, the schedule group has a start date of Saturday, January 1, 2011 and repeats every 7 days. By default, this rule is valid each period from Saturday at 12:00:00AM until Saturday at 12:00:00AM.

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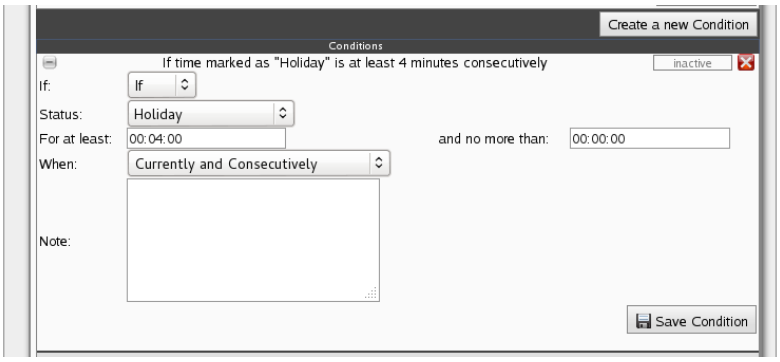
11. Decide whether to **Run action if** "All conditions are true" or "Any conditon is true".
    - If **All conditions are true** is selected, every condition must be true at the same time for the actions to be run.
    - If **Any condition is true** is selected, the actions will be run if and when any configured condition would be true.
12. Click the **Save Rule** button.

CONDITIONS can be created to restrict when the advanced schedule rule will apply.

1. Click on the **Create a new Condition** button.
2. Click on the **+** (plus) sign to the left of the new condition to expand the window and set up the terms.



3. Select the necessary terms.
    - "**If**" determines whether or not the other terms are required to be true or false.
        - If: Requires that the following details be true.
        - If Not: Requires that the following details be false.

      For example, if you want to have a rule that only fires if an employee has worked 8 hours in a day. Or, you might want a rule that only fires if an employee failed to work hours in a day.
    - The "**Status**" allows a condition to look at what an employee has done.

- Out: The employee is clocked out.
- In: The employee is clocked in with or without a job or work order.
- In Default Job: The employee is clocked in to their default job.
- In No Job: The employee is clocked in, but not into a job.
- In Job: The employee is clocked in to the specified job.
- In Work Order: The employee is clocked into the specified work order.
- In Job In Work Order: The employee is clocked into the specified work order and job.
- Benefit: The employee has the selected benefit time used.
- Any Benefit: The employee has any kind of benefit time used.
- Holiday: The employee has received holiday time.
- All time: All worked, benefit and holiday time for the employee.
- Expression is true: A custom expression evalutates true. Please contact TimeIPS for assistance in using an expression.

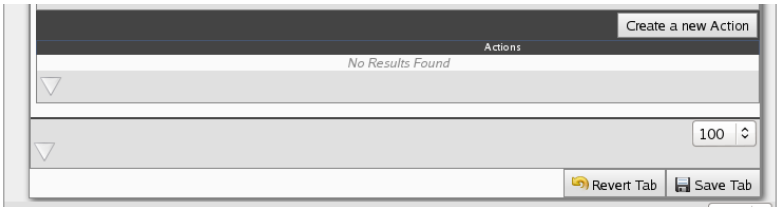
- "**For at least**" means that this minimum time must be met for the condition to be true. If 00:00:00, there is no minimum time requirement. If you want a minimal requirement, select 00:00:01
- "**and no more than**" sets a maximum time there can be for the condition to be true. If 00:00:00, there is no maximum time requirement.

- "**When**" limits the time frame for the "Status", the "For at least", and the "and no more than" conditions above.
  - Since Hire: Includes the entire time since the employee was hired.
  - During Current Calendar Day: Includes only the current calendar day in the time zone of the employee.
  - During Rules Applies Interval: Includes the duration starting with the "From:" rule to the end of the "To:" rule.
  - Currently and Consecutively: Employee is currently in the selected state, and has been in for the specified time
  - During last (hours:minutes:seconds): At any time during the specified previous hours.

4. Click the **Save Condition** button.

ACTIONS are the result of the condition being met. Different options are available depending on what the action is. Below are the most commonly available options.

1. Click on the **Create a new Action** button.

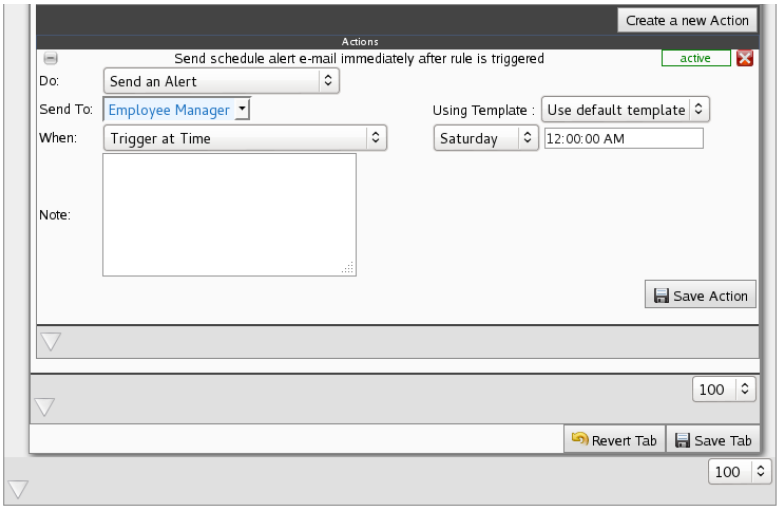


2. Click on the **+** (plus) sign to the left of the new action to expand the window and set up the terms.

3. Select what the system is to **Do** and **When**.
   - "Do" describes the action that will be taken.
     - Clock In: Clock the employee in, if out. If already in, clock them out, then back in.
     - Clock Out: Clock the employee out, if in. If already out, clock them in, then back out.
     - Clock In to Job: Clock the employee in to the selected job. If already in, change job. If already in the job, clock out and back in.
     - Clock In to Job in Work Order: Clock the employee in to the selected job and work order. If already in, change job. If already in the job/work order, clock out and back in.
     - Use Benefit Time: Use the selected benefit type for the employee. For example, to pad the day with vacation time to meet the employee's schedule.
     - Deduct Worked Time: Remove worked time from the employee. For example, to create an Automatic lunch/break.
     - Send an alert: Send an email to the Employee, the Employee's Manager, or the Schedule Group alert email address. For example, this can be used to create an alert for early clock-in, tardy, excessive lunch, approaching overtime, in overtime, etc.

       TIP: There is the additional option to choose a custom template. Create a custom template by going to System » E-Mail Templates and choose the Advanced Schedule Alert type.

     - Deny Clock: If the rule's conditions are met as the result of an employee clocking, deny the clock. For example, to prevent early or late clock-in, clocking into the wrong job, clocking in when not scheduled, etc.
   - "When" is the time that the action will be applied to (always fires immediately).
     - Trigger at Time: Take the action at the specified time. For example, if using benefits, they can be set to be used at 8:00 AM. The day that will be used for this action is governed by the following rules.
       - The date and time can be in the past only if within the rules apply interval. For example, if the rule applies from 5:00PM to 6:00PM, the time for the trigger cannot be prior to 5:00PM. If it is (i.e. if you specify 4:00PM), it will be interpreted as 4:00PM on the next day (or week, see below).
         - If the day and time are prior to the rules apply interval start, the system will walk forward a number of days equal to the "Schedule repeats every" option and apply the rule then. For example, the rule starts Wed at 5:00PM and repeats weekly. If you specify 4:00 PM Wed it will apply next week on Wed at 4:00
       - If the date and time are beyond the rule's start and stop times then the system will move forward another day.
     - Trigger (HH:MM:SS) After Rule Occurs: Take the action immediately (00:00:00) or some time after the conditions were met.
     - Trigger (HH:MM:SS) Before Rule Occurs: Take the action immediately (00:00:00) or some time before the conditions were met. For example, deduct time 1 hour prior to the time the conditions became true.
     - Trigger (HH:MM:SS) After Last Punch: Take the action immediately (00:00:00) or some time after the last punch. For example, use benefit time immediately after the employee clocked out for the day.
     - Trigger (HH:MM:SS) Before Last Punch: Take the action immediately (00:00:00) or some time before the last punch. For example, take a break (deduct time) 2 hours before the employee clocked out.
   - "Duration" controls the length of particular actions that will be taken. For deduct time, the Target will limit the deduction amount such that the duration will not end up putting the employee below the target. For Use times, the Target will limit the use such that the duration will not end up putting the employee over the target.
     - Up to Duration: This is the maximum duration that will be used. If no target is set, this duration will be used.
     - Targeting - No Target:: Just use the full duration, no additional limit.
     - Targeting - Daily Worked Time verses Daily Schedule: Considering worked time only, use enough time so that daily worked time will meet Daily schedule. For example, if deducting time for automatic breaks, take up to an hour, but if that hour would put the employee below their daily scheduled hours, stop there. I.e. Employee scheduled for 8 hours, but has worked 8.5 hours. Take "Up to Duration" of 1 hour, targeting Daily Worked Time verses Daily Schedule will only deduct 30 minutes, resulting in the employee meeting their schedule. In the same example, if the employee worked 9.5 hours, the deduct would be the full hour. And, if the employee worked 7.5 hours, nothing would be deducted.
     - Targeting - Daily Worked Time and Benefit Time versus Daily Schedule: Consider worked time and benefit time vs the daily schedule.
     - Targeting - Weekly Worked Time versus Weekly Schedule: Consider the weekly worked time vs. the total time scheduled for the week. When using weekly times and schedules, care should be taken that the rule triggers at a time that matches the employee's schedule. The "week" is considered Monday to Sunday for the employee in their time zone.
     - Targeting - Weekly Worked Time and Benefit Time versus Weekly Schedule: Consider worked time and benefit time for the week.
     - Targeting - Daily Worked Time versus Specified Hours: Consider daily worked time vs. the time specified in the box to the right. For example, this can be used when all employees should work 8 hours in a day, and don't have set schedules.
     - Targeting - Daily Worked Time and Benefit Time versus Specified Hours: Consider daily worked and benefit time.
     - Targeting - Weekly Worked Time versus Specified Hours: Consider weekly worked time.
     - Targeting - Weekly Worked Time and Benefit Time versus Specified Hours: Consider weekly worked and benefit time.



4. Click the **Save Action** button.

5. Make sure the Schedule Rule, Conditions, and Actions are **active** by looking to the far right of each item.
   - Active items display a green **active** button.
   - Inactive items display a gray inactive button. Click the inactive button to change it to active.
6. To **Delete** an item, click the red **X** to the far right of that item.
7. Click the **Save Tab** button to make sure all changes are saved.

Notes and Considerations

Advanced schedules allow automatic handling of a wide variety of situations and add great flexibility to the TimeIPS system. This same flexibility can make creating rules, conditions and actions challenging. Rules can be configured that are valid, but cause unexpected results, such as an action that makes another rule take an action causing the first rule to take an action again. This can create a "loop" where an employee is clocked in/out, changes jobs, uses benefit time, etc., over and over.

We recommend carefully testing and validating rules and/or consulting with TimeIPS technical support when creating and configuring your rules.

Shifts

Shifts are used in conjunction with Batch Time Entry to provide a way to enter time worked in blocks for multiple employees and multiple days at a time. Time can be entered by hand or imported from a csv file using Batch Time Entry. Create a shift for each time of day that you need to enter/import time. For example, first shift might be at 8:00AM, second shift at 4:00PM and third shift at 12:00AM.

1. A way to manually enter time in batches
2. A way to apply differentials or special pay types for durations of time in a day, week, etc.

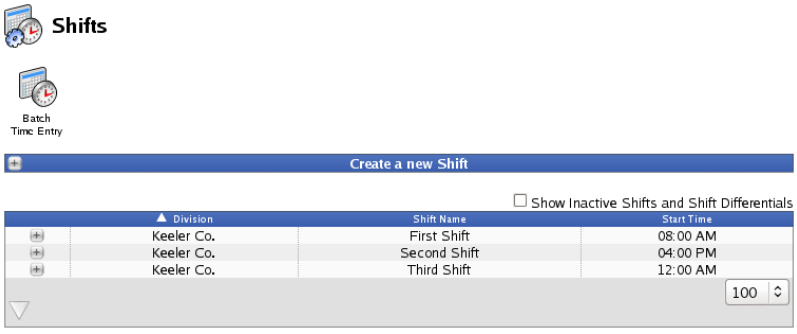
Using the left pane Main Menu » Administration, click on: Schedules » Shifts

- or -

Using the left pane Main Menu » Administration, click on: Clocking » Batch Time Entry

and then click on the Shifts Administration icon

at the top of the page.



Create a New Shift

1. Click the **+** (plus) sign on the left hand side of the **Create a new Shift** bar.
2. Type in the **Name** and **Start Time**.
3. Click the **Create** button.

NOTE: Created shifts can be deactived, but not deleted.

Edit Shift

1. Click the **+** (plus) sign to the left of the shift.
2. From the **General Options** tab, the **Name** and **Start Time** can be changed.
3. Click the **Deactivate Shift** button if this shift is not currently needed.

NOTE: Deactivated Shifts or Differentials are hidden by default. Check the box above the table to Show Inactive Shifts and Shift Differentials in the table below.

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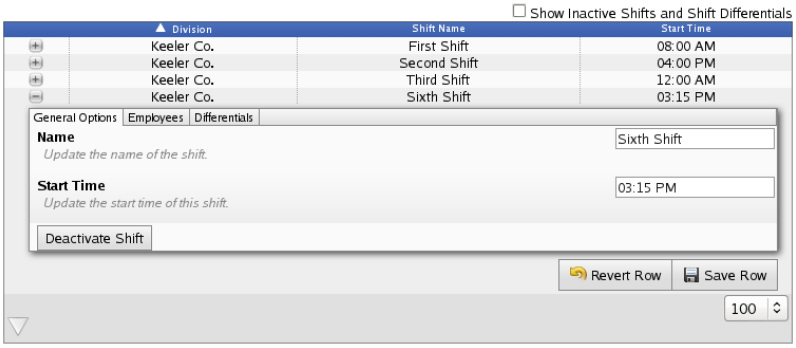
4. Click the **Save Row** button.



Add Employees to a Shift

1. Click the **+** (plus) sign to the left of the shift.
2. From the **Employees** tab, click the employee's name to hightlight it and then click the arrow pointing right to move them to this shift.

TIP: Hold down the Control key to highlight and move mulitple employees at once.

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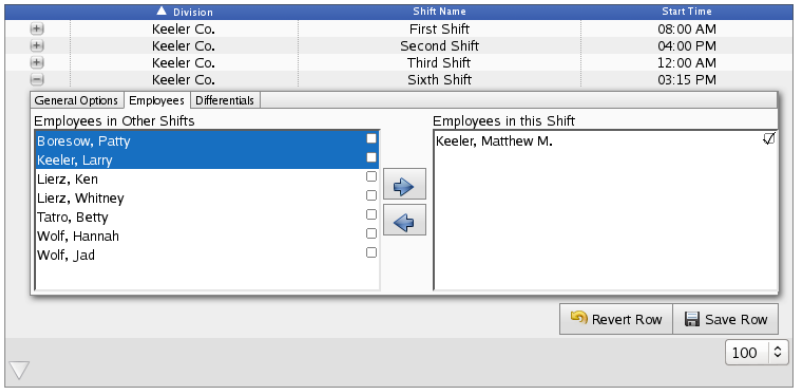
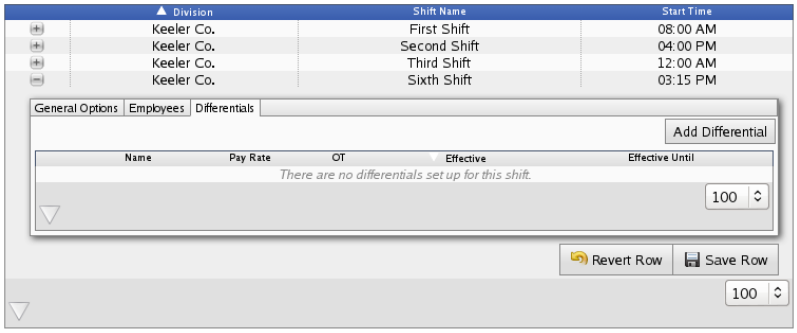
3. If there is a checkmark in the small box to the right of the employees name, they have a shift history. Click the box to view history.
4. Click the **Save Row** button.

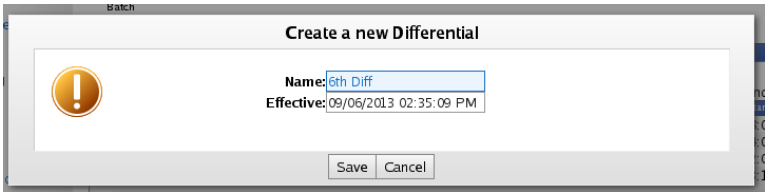


Create a Shift Differential

1. Click the **+** (plus) sign to the left of the shift.



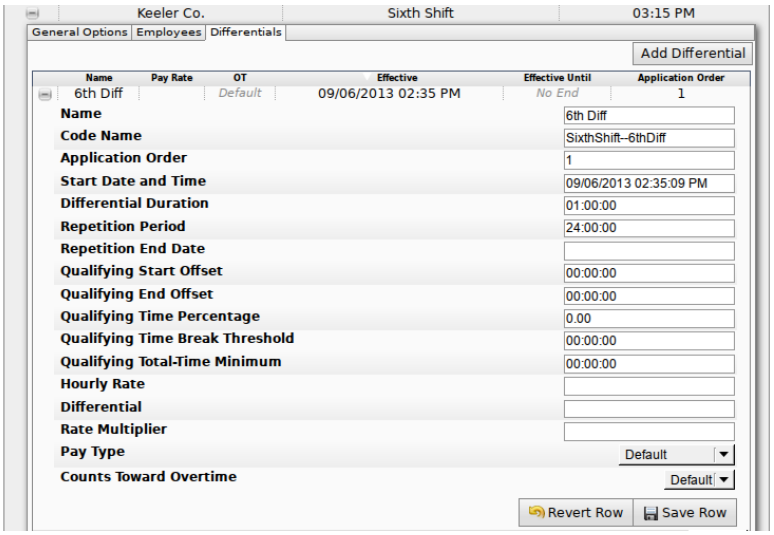
2. From the **Differentials** tab, click the **Add Differential** button.



3. Add a **Name** and **Effective** date/time for the new differential, then click **Save**.

Edit Differential

The Differentials tab allows setting spans of time that are paid in special ways.



1. Click the **+** (plus) sign to the left of the differential to expand the window and set the terms.
   - You can update the **Name** of this differential which is used in descriptions and reporting.
   - You can change the optional **Code Name** which is used in Custom Payroll and Reports.
   - Pick the **Start Date and Time** this differential will apply.
   - The **Differential Duration** defines how long the differential will apply. If Repetition Period is set, the differential applies for this duration at the beginning of each repetition period.

     NOTE: The duration is NOT adjusted for DST. This means that the duration spans the DST hour for an empolyee in a DST time zone, the total duration will always be as configured. The duration will not be shortened or lengthened by a DST shift.

   - The **Repetion Period** allows the shift differential to occur repeatedly. To have it occur daily, enter 24:00:00. To have it occur weekly, enter 168:00:00. The repeat duration is adjusted for DST. This means that the repeat will be shortened or extended an hour as necessary if the employee is in a DST time zone to allow the differential to occur at the same time each day.
   - If the Repetion Period rule eventually needs to end, set the **Repetition End Date**. After this time, the rule will no longer repeat, will not be active, and will no longer appear in the Differentials list.
   - The **Qualifying Start Offset** is the number of hours from the beginning of the shift, used to define the starting point of the qualifying duration.
   - The **Qualifying End Offset** is the number of hours from the end of the shift, used to define the ending point of the qualifying duration.
   - The **Qualifying Time Percentage** is the minimum percentage of each time segment that must fall within the above specified qualifying duration to be considered for this differential. Set to 0.0 to disable.
   - If there is a specific pay rate (such as $10/hour) for time worked during the differential, enter it as the **Hourly Rate**.
   - If there is a specific differential amount (such as $2.00/hour) which is paid in addtion to the standard pay rate, enter that as the **Differential**.
   - If the differential time worked is a multiple of the standard pay rate, enter that as the **Rate Multiplier**. For example, enter 1.5 to pay at 150% of the employee's standard pay rate.
   - Choose the **Pay Type** for work done during this differential.
   - Decide whether or not the time worked during this differential will **Count Toward Overtime** for the week.

NOTE: The "Pay Type" and "Counts Toward Overtime" settings require the IPSOTO Overtime Options module if you would like any setting other than Default.

When calculating payroll, the settings for differentials and pay types are done in order as follows:
- **Per-event override, job override, holiday override, shift override.**
- **For Pay Type, Counts Toward Overtime and pay rate, the result will be the first override that's found, going in order of priority.**

- **For Differentials, the amounts are added for each, in order of priority.**

2. Click the **Save Row** button.

Batch Time Entry

Batch Time Entry provides a quick way to manually enter time for multiple employees.

Requires the IPSSFT shifts module.

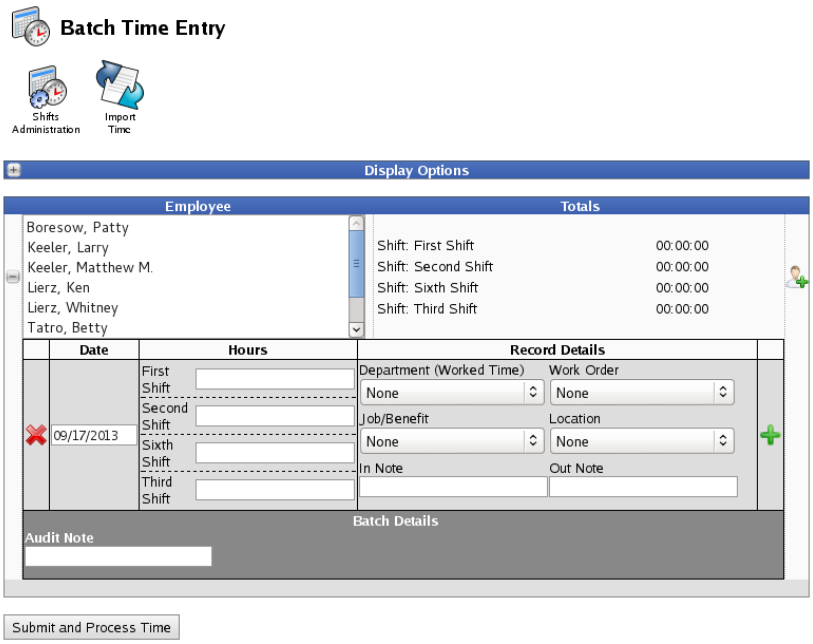
Using the left pane Main Menu » Administration, click on: Schedules » Shifts

and then click on the Batch TIme Entry icon

at the top of the page.

- or -

Using the left pane Main Menu » Administration, click on: Clocking » Batch Time Entry

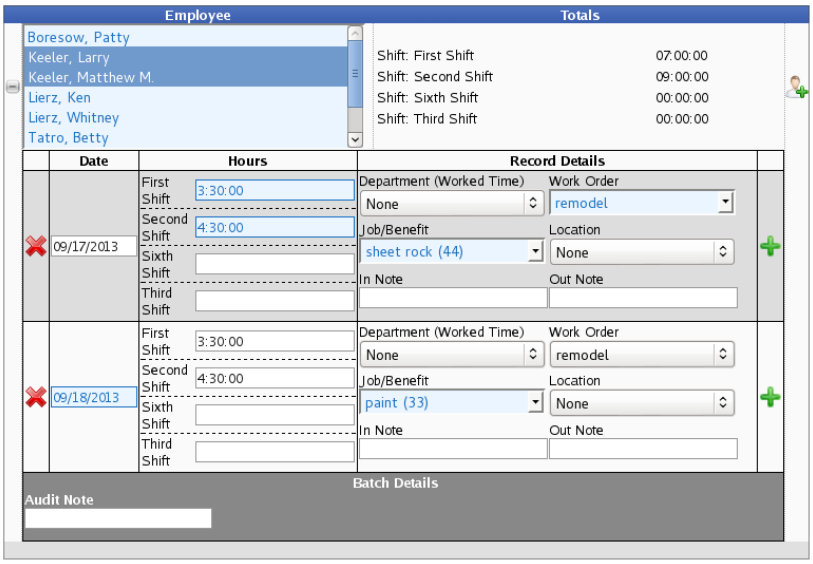


- Select one or more **Employees**.

TIP: Hold down the Control or Shift key to highlight and move mulitple employees at once.

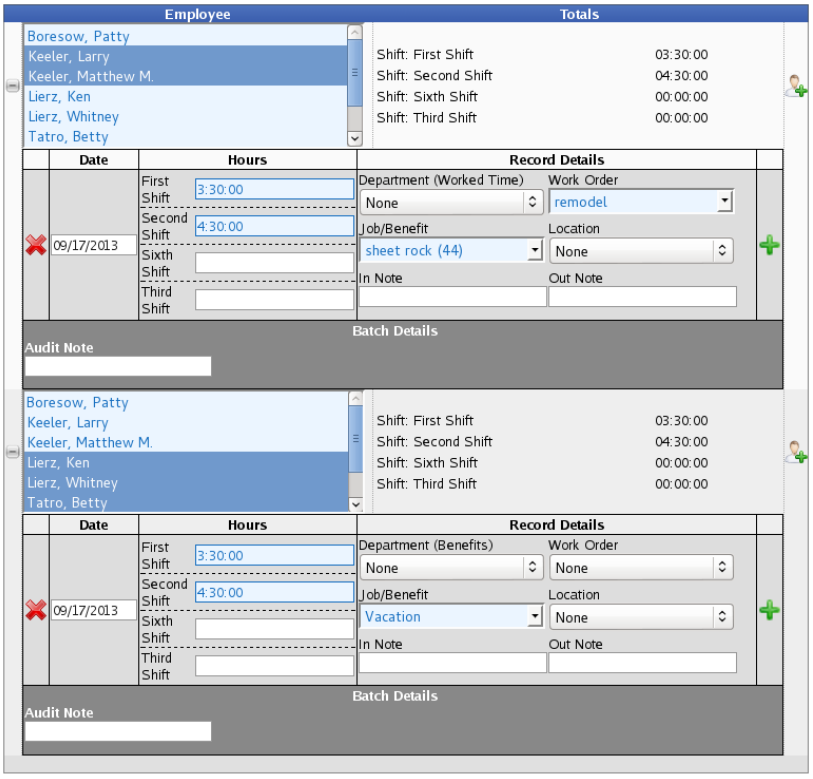
- Enter a **Date** when the empolyee(s) worked.
- Enter **Hours** of work on each shift. Use shifts administration to enter additional shifts, if needed.
- Select the **Work Order** (Requires IPSJWO) and/or **Job/Benefit**.
- Optionally, select a **Location**, and enter an **In Note**, **Out Note** and/or **Audit Note**.

- To add work on additional days, click the big **green** (plus) sign at the end of the row. To delete, click the **red** **X** at the front of the row.



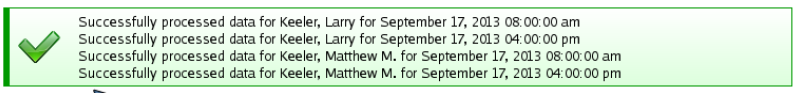
Submit and Process Time

- To add additional groups of employees working, click the face icon with **green +** (plus) sign at the end of the employee selection area



Submit and Process Time

- Click the **Submit and Process Time** button, and the following success message should appear to confirm the entry.



Display Options

Click on Display Options to configure advanced options regarding how you wish to interact with Batch Time Entry. If you typically want to use this interface in a custom manner you can save the configuration as a preset and optionally make that preset the default view for this page.

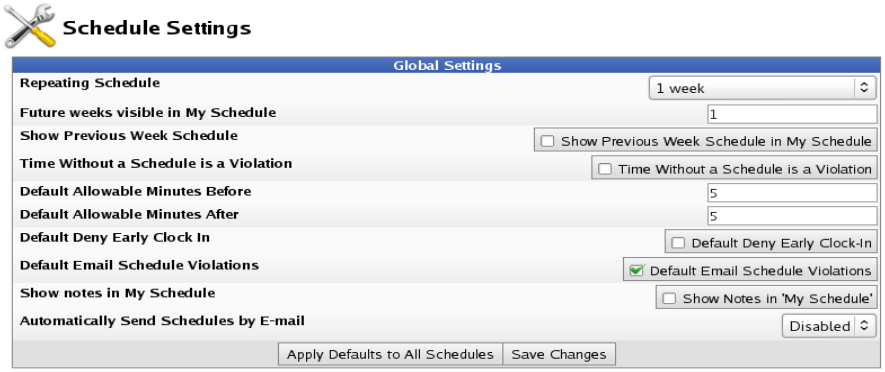
1. If you choose to **Show Time As**:
   - **Shift and Duration**, the exact clock-in and out time in HH:MM:SS will be displayed in the **Hours** column. NOTE: You must have at least one shift configured in the system.
   - **Start Time and Duration**, the exact clock-in and out time in HH:MM:SS will be displayed in the **Hours** column.
   - **Start and Stop Time**, the exact clock-in and out time in HH:MM:SS will be displayed in the **Hours** column.
2. Employee Selection Preference provides choices on how you want to select employees.
   - If you select **Single Employee**, you can only enter time for one employee per batch.
   - If you select **Multiple Employees: 3**, **6**, or **10 rows**, that is how many rows show in the employee column without having to scroll..
3. Choose which **Shifts to Include** by checking the box next to each shift you want to appear in the table.
4. The following **Advanced Display Options** can be...
   - set to **Show Each Record**, **Show Each Batch**, or **Hide**.
   - arranged in any order by changing the number of their **Position**, 1 appearing first.
   - given a **Default** value.
   - given a **Display As** name.

   - **Department (Worked Time)** This is the option to specify the department from the list of departments tracked against worked time. Time is either worked time or benefits if the value of the Job/Benefit selector is a Job or Benefit Type respectively. This option will not show unless there is at least one department configured to track time against worked time as configured on the Department Administration page.
   - **Department (Benefits)** This is the option to specify the department from the list of departments tracked against benefits. Time is either worked time or benefits if the value of the Job/Benefit selector is a Job or Benefit Type respectively. This option will not show unless there is at least one department configured to track time against benefit usages as configured on the Department Administration page.
   - **Work Order** With the IPSJWO module this option allows you to specify the Work Order that this time is associated with. The Work Order option is tied to the Job/Benefit selector as specifying a Work Order will restrict the list of available jobs.
   - **Job/Benefit** Selecting from the list of Jobs specifies that the events to be created are worked time. Selecting one of the available benefit types indicates that the created events are benefit usages.
   - **Location** Select an option from this list to associate time events with a specific location.This list comes from the list of clocks associated with this division as seen on the Clock Configuration page.
     Note: This option is ignored when entering benefit time.
   - **In Note** Specify an optional Clock In Note to be associated with a time event.
     Note: This option is ignored when entering benefit time.
   - **Out Note** Specify an optional Clock Out Note to be associated with a time event.
     Note: This option is ignored when entering benefit time.
   - **Audit Note** Text specified will be used either as an audit note for a worked time event or a comment for a benefit event.
   - **Tracking Fields** You can be prompted with a list of tracking fields as configured on the Tracking Field Administration page. There are potentially seperate fields that will be prompted based on whether an event is worked time or benefits. Time is either worked time or benefits if the value of the Job/Benefit selector is a Job or Benefit Type respectively. Default values for tracking fields and their display text is configured on the Tracking Field Administration page.
5. Once you have finished customizing, click the **Update Display** button.

Global Schedule Settings

Global Schedule settings control a number of schedule options including if schedules are repeating.

Using the left pane Main Menu » Administration, click on: Schedules » Global Settings



- To use **Repeating Schedules**, select the number of weeks from the drop-down box. Select "Disable repeating schedules" to prevent any automatic repetition of schedules. For more information and examples, see the Repeating Schedule article.
- To allow employees to see schedules into the future, enter a positive number of weeks in the **Future weeks visible in My Schedule** box.
- To allow employees to see the previous week in My Schedule, check the box next to **Show Previous Week Schedule in My Schedule**.
- To trigger a schedule violation alert for an employee who clocks-in on a day they are not scheduled to work, check the **Time Without a Schedule is a Violation** box.
- In the field next to **Default Allowable Minutes Before**, add the default number of minutes an employee can clock before a scheduled clock in/out without triggering a schedule violation.
- In the field next to **Default Allowable Minutes After**, add the default number of minutes an employee can clock after a scheduled clock in/out without triggering a schedule violation.

- To deny an early clock in, check the **Default Deny Early Clock-In** box.
- To make emailing schedule violations the default action, check the **Default Email Schedule Violations** box.

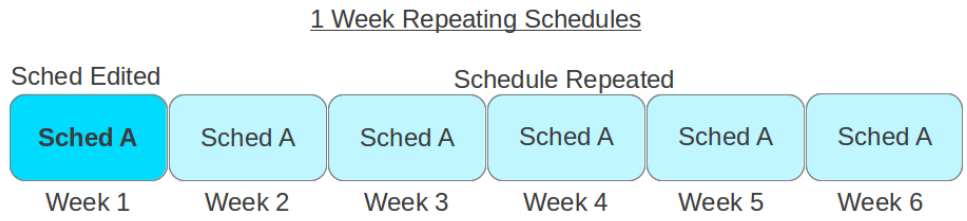
TIP: When importing schedules, the import file does not need to include "Allowable Minutes Before/After", "Deny Early Clock In", or "E-mail Schedule Violations". In cases when these are left out, TimeIPS will use the defaults set here to fill in the values.

- To enable schedule notes, check the **Show Notes in "My Schedule"** box.
- Employees can receive emails with their upcoming schedule automatically by enabling the **Automatically Send Schedules by E-mail** option.
- If you've made a change to the default values, and would like them to apply to all existing schedules, first click the **Save Changes** button, then click the **Apply Defaults to All Schedules Now** button.

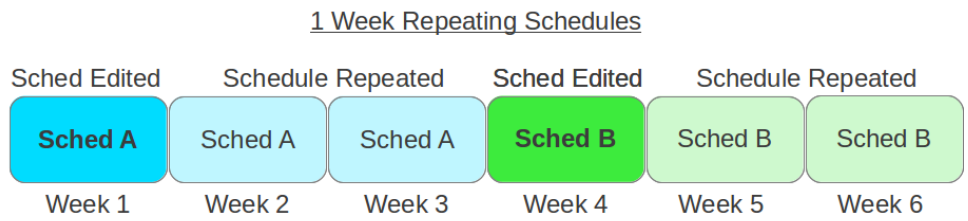
Repeating Schedules

Repeating schedules allow a manager to configure schedules once for an employee and have that schedule automatically copy forward.

Repeating schedules can be enabled or disabled on the Global Schedule Settings page. Repeating schedules are enabled by choosing a number of weeks that should be "repeated" forward in an employee's schedule. The way this works is that the most recently defined schedule for an employee is assumed to be the current schedule. See the below example.

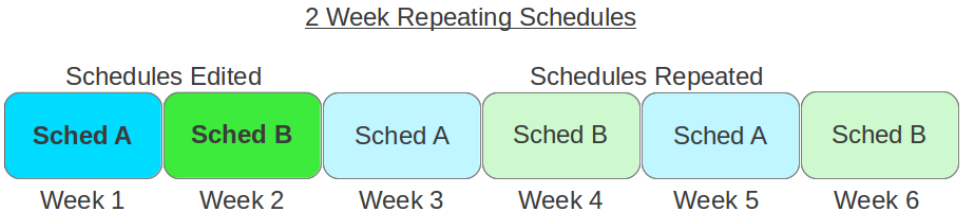


In the example we defined a schedule (which we call A) during week 1. We have made no further edits so from that point forward schedule A is repeated forward. Unless we make any other changes we will continue to assume that schedule A is still valid. If we were to make changes it would look like the next example.

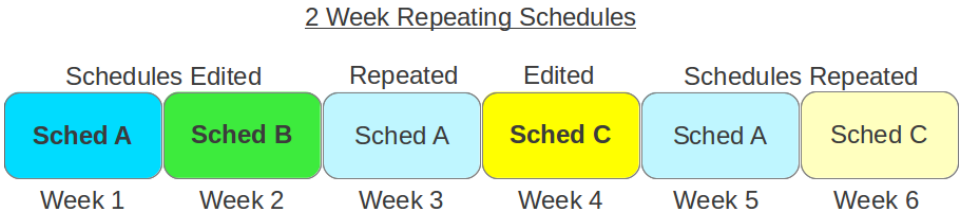


During week 4 we made a change to the schedule creating what we will call schedule B. Now from week 4 forward this is assumed to be the correct schedule.

This same principle applies if you choose to have more than one week repeat at a time. Consider this example where we have two week repeating schedules



We defined schedules A and B over a two week period, weeks 1 and 2. Those two weeks continue to repeat forward in a leapfrog fashion. Until a change is made to one of these threads this schedule will continue to repeat forward.



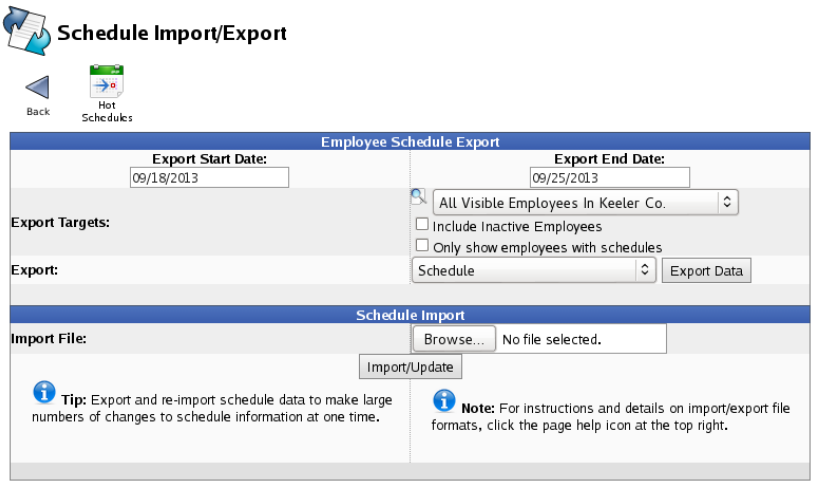
Here we have made a change during week 4. Schedule A still continues to repeat forward as normal, but schedule C is now being repeated forward until its thread is changed again. In this example weeks 7 and 8 (not shown) would follow schedules A and C respectively.

See Also:
Global Schedule Settings

Schedule Import/Export

TimeIPS allows exporting and re-importing schedule data to make large numbers of changes to schedule information at one time.

Using the left pane Main Menu » Administration, click on: Schedules » Import/Export



Employee Schedule Export

- Pick an **Export Start Date** by clicking in the date box. Select a date off the drop down calendar or manually type the date.
- Pick an **Export End Date** by clicking in the date box. Select a date off the drop down calendar or manually type the date.
- Choose which employees the **Export Targets** from the drop down box. Check the boxes below to **Include Inactive Employees** or **Only show employees with schedules**.
- Choose to either **Export** the Schedule, the Schedule with Allowable Minutes, a Horizontal Layout, or a Horizontal Daily Layout.

TIP: Export all or multiple versions to find the one that best fits your needs.

- Click the Export Data button to export the schedule to a CSV formatted file. This file can be edited and then imported by using the Import function below.
- To edit the resulting .csv file, we recommend a spreadsheet application such as Excel™ or OpenOffice.org Calc.
- If you make changes to the .csv file and would like those changes to take effect in TimeIPS®, use the Import/Update function below.

Schedule Import

- To begin, view the detailed schedule, horizontal schedule, and daily horizontal schedule instructions pages. To view these, show all help on the Schedule Import/Export page in your TimeIPS system, and then click the provided links.
- Use the Export function above to generate a template file and either save the file on your desktop/home directory or open it directly. Use a spreadsheet program such as Excel™ or OpenOffice.org Calc and fill in your employee data.
- Save your updated .csv file to your desktop/home directory.
- Back on the Schedule Import/Export page, click the **Browse** button and select your new or updated .csv file.
- Click the **Import/Update** button.

Payroll

Payroll includes payroll settings and exports.

Payroll Settings *require the assignment of several types of rules within the TimeIPS system. There are three main types of rules that must be set.*

1. Overtime Policies

2. Workweek Groups

3. Payroll Types

Note: *For ease of use, TimeIPS recommends that these rules be set in the order listed. We also recommend these rules be set before employees are initially added to the TimeIPS system (when possible).*

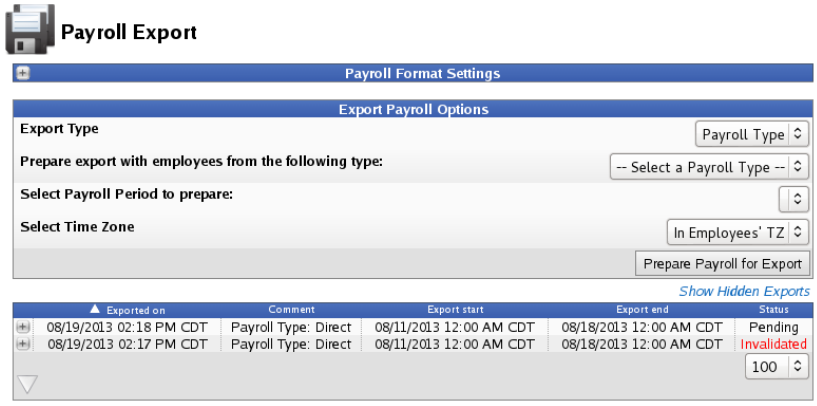
Payroll Exports *can generate a file with your payroll data. Many of these files can be opened in a spreadsheet application, or, if using the Payroll Integration with Benefits Tracking optional module, the file can be imported in your payroll application.*

See Also:
Run a Time Report
Deleting a Time In/Out Pair
Define Payroll Types
Adjust Work Week Settings
Import/Export Payroll Types

Payroll Export

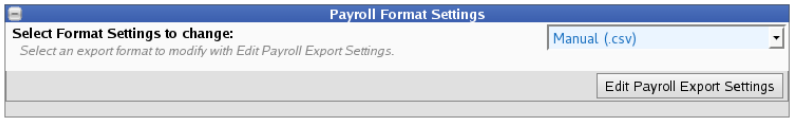
TimeIPS Payroll Export can generate a file with your payroll data. Many of these files can be opened in a spreadsheet application, such as Microsoft Excel or OpenOffice Calc, or, if using the Payroll Integration with Benefits Tracking optional module, the file can be imported in your payroll application, such as ADP, Paychex, or QuickBooks.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Export Format

There are many different file formats available to export and view the payroll report. A preset will need to be created using your desired format in order to export.



1. Click the **+** (plus) sign to the left of **Payroll Format Settings** bar to expand the window.
2. From the drop down box, select the **File Format** to modify.

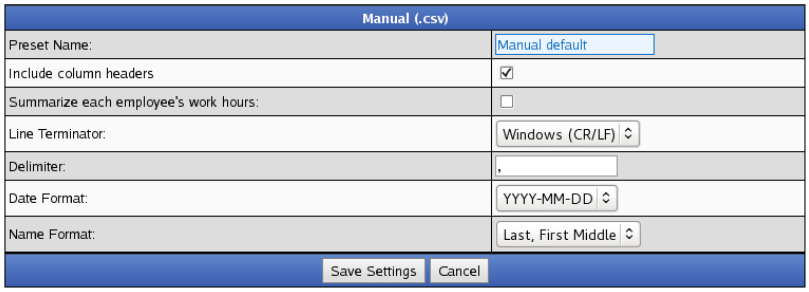
NOTE: In the example above, "Manual (.csv)" has been chosen. The manual payroll export offers a basic comma separated values file that can be opened in a s spreadsheet program such as Open Office Calc or Microsoft Excel.

---

3. Click the **Edit Payroll Export Settings** button to bring up the editing screen.

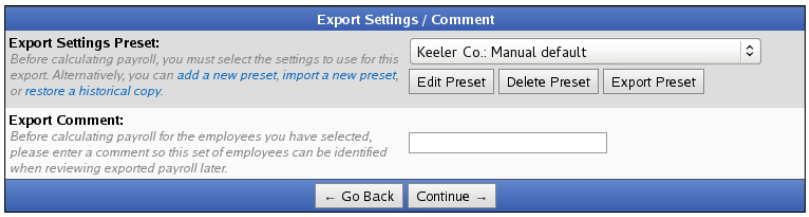
If you have not already created a preset for this file type, you will see the following screen.

Click the **Add Preset** button to begin setting up a preset for the chosen file type.



There are several other different options available which vary depending on the file type being created.

4. Give the preset a unique **Name**.
5. Make the appropriate selections for your company's needs.
6. Click on the **Save Settings** button.



7. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
8. Optionally if you wish to add a comment to the export making it unique and easily identifiable you can do so now.
9. Click **Continue**

Prepare Payroll for Export

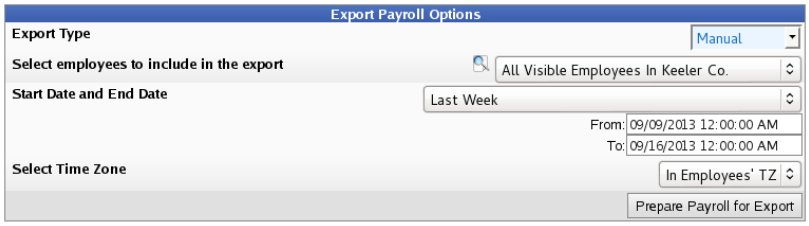
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

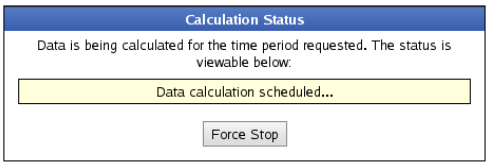
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

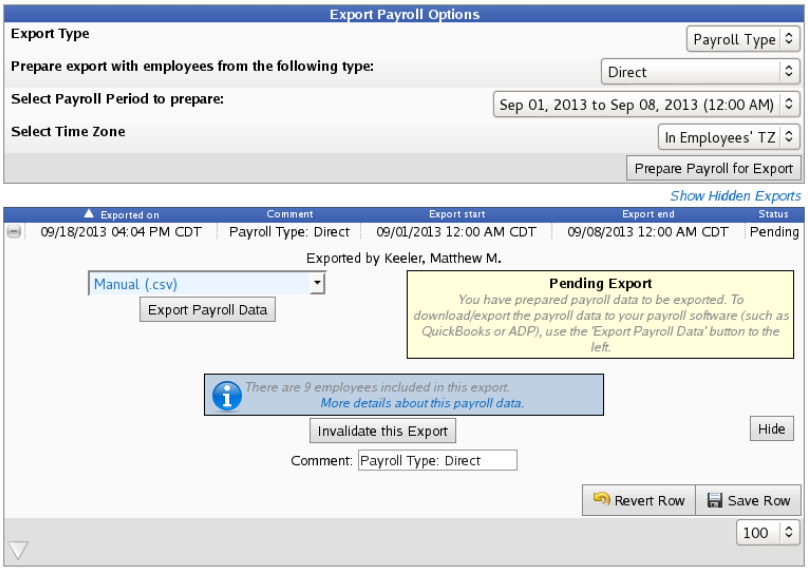


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Choose a **file format** from the drop down menu.

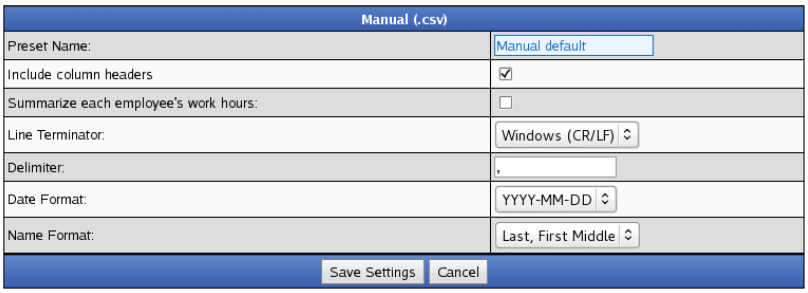
   NOTE: There are many export formats available, in the above example Manual (.csv) has been chosen. The manual payroll export offers a basic comma separated values file that can be opened in a spreadsheet program such as Open Office Calc or Microsoft Excel.

2. Next click on the button labeled **Export Payroll Data.**

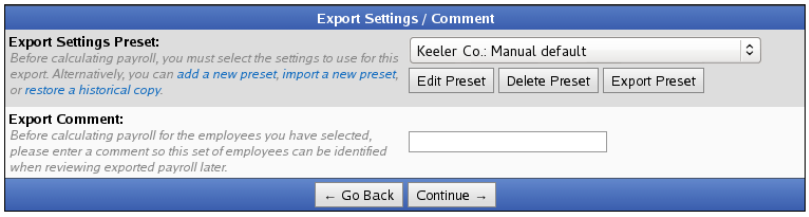
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a preset for this file type, you will see the following screen.

Click the **Add Preset** button to begin setting up a preset for the chosen file type.

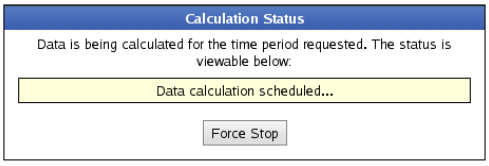


There are several different options available for customization which vary depending on the file type being created. Name your new preset and make the appropriate selections for your company's needs before clicking on the **Save Settings** button.



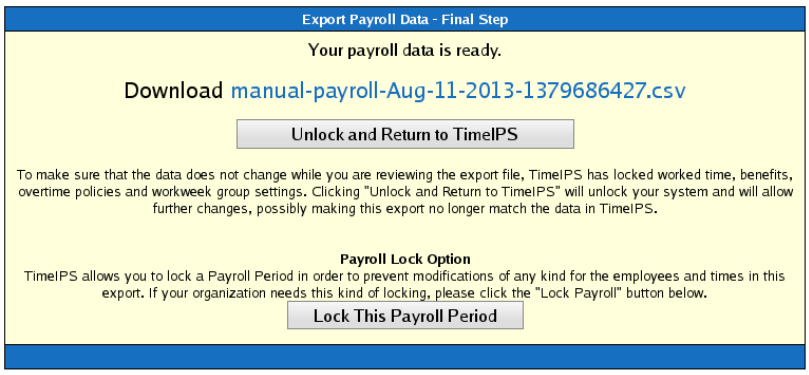
1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.



Payroll Export Data - Final Step

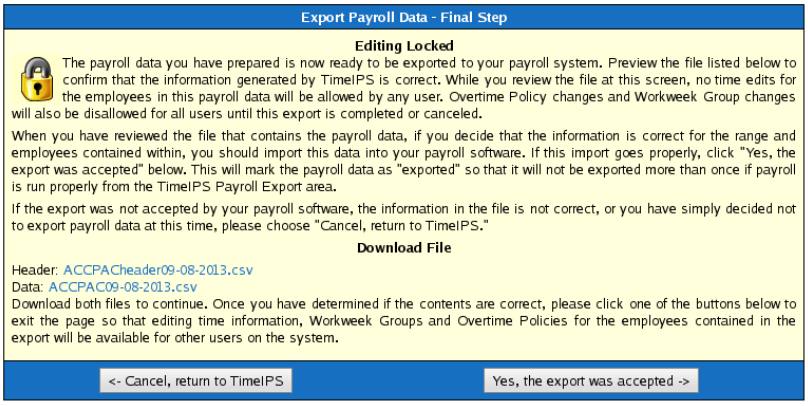
The final step of exporting payroll data is virtually the same regardless of file type chosen, though the window/image may vary.



Example 1:

- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

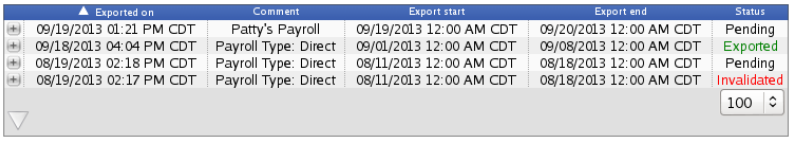
NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Example 2:

- Click the **blue** links to **Download** the newly created files and open them in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Yes, the export was accepted** otherwise choose **Cancel, return to TimeIPS**. Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Cancel, return to TimeIPS", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Yes, the export was accepted", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

Internal Information (visible to Administrators only):

	v1.4	v1.5 and up		
	IPSQBI	IPSQBI	IPSCPI	IPSEPI
Payroll Exports	**No Dependencies**	**No Dependencies**	**Requires IPSQBI & IPSIPS**	**Requires IPSQBI & IPSIPS**
*ACCPAC**	*X*			
*ACCPAC Header**	*X*			
ADP PC/Payroll 5.1	X	X	X	X
Custom: Audit Detail			New	X
Ceridian Insync	X			New

Custom Export			New	X
Creative Solutions Payroll CS	X	X	X	X
Fortune 1000	X	X	X	X
Great Plains (Custom Preset)				New
Hours Worked Detail (Custom Preset)			New	X
Hours Worked Summary (Custom Preset)			New	X
Job Detail (Custom Preset)			New	X
Manual (.csv)	X	X	X	X
MAS90/200 Format 2 (Custom Preset)				New
Paychex 5	X	X	X	X
Paychex Paylink 9	X	X	X	X
Paychex Preview 6.4 (RapidPay)	X	X	X	X
PayChoice (Custom Preset)				New
Paywork	X	X	X	X
PeachTree Complete Accounting				New
PeopleSoft 8	X	X	X	X
*Preview-Review (HTML)***	*X*			
QuickBooks Integration	X	X	X	X
Time+Plus Format (Custom Preset)				New
Vadim (Custom Preset)				New
*Volt**	X			

* *Not supported after v1.4*
** *HTML version, not an export; only available pre-1-5*

Payroll Integration with Benefits Tracking Module (IPSQBI) provides:

- Quickbooks
- ADP
- Paychex 5
- Paychex 6.4 (RapidPay)
- Paychex 9 (Paylink)
- Fortune1000
- Paywork
- PeopleSoft
- PayrollCS
- Paywork

Enhanced Payroll Integration (IPSEPI) provides:

- Peachtree (export)
- Ceridian Insync (export)
- Time+Plus (preset)
- Great Plains (preset)
- PayChoice (preset)
- MAS90/MAS200* (preset)
- Vadim (preset)

* Best "Extended Solution PR-1031" Module required.
(Purchase separately from Best Software)
Requires 1.5.7 or greater

Customizable Payroll Export (IPSEPC) provides:

- Does not come with payroll-specific presets

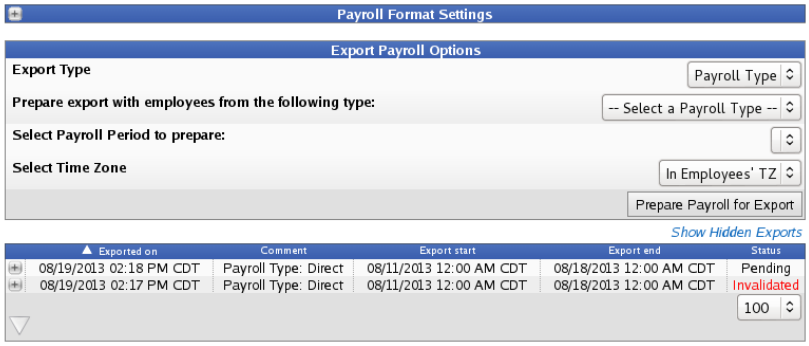
Requires 1.5.7 or greater-->

ADP Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. The file can be opened in a spreadsheet application, such as Microsoft Excel or OpenOffice Calc. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, the file can be imported in your ADP payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export

Payroll Export



Before you export:

- If using jobs, **Control Numbers** are exported to ADP via the "Temp Dept" field and must be 3 or 6 characters long, containing only uppercase letters, digits, and the following characters: $ / - . ,

NOTE: In order to export an employee's hours for a specific job separately from their default work hours, the job must have a control number. This is set up on the Billing Tab of the Job record in Job Management.

- You will have the option to use the employee's **ID/Badge**, **Alternate ID Number**, or **Social Security Number (SSN)**. Employees are assigned an ID/Badge number by default, but Alternate Numbers and Social Security Numbers must be entered prior to export if you choose either of these identifiers.

Prepare Payroll for Export

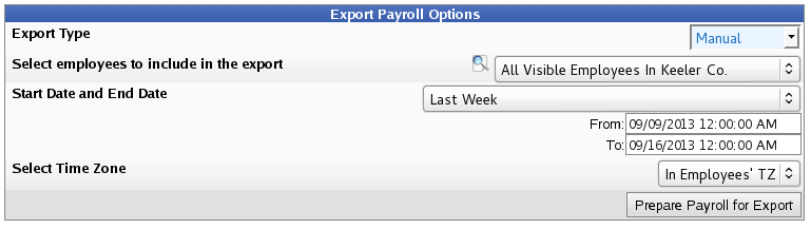
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

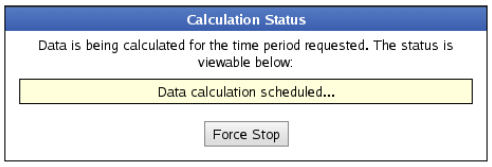
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

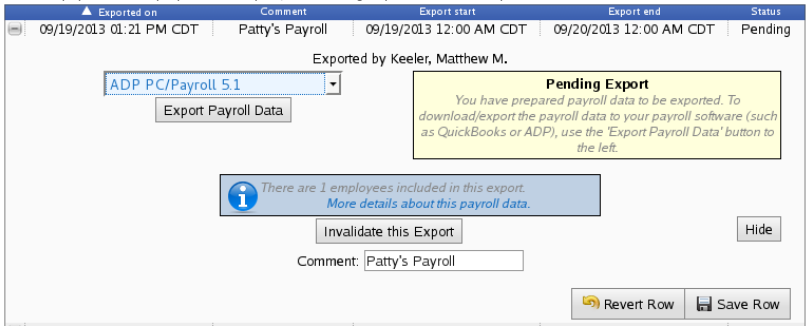


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



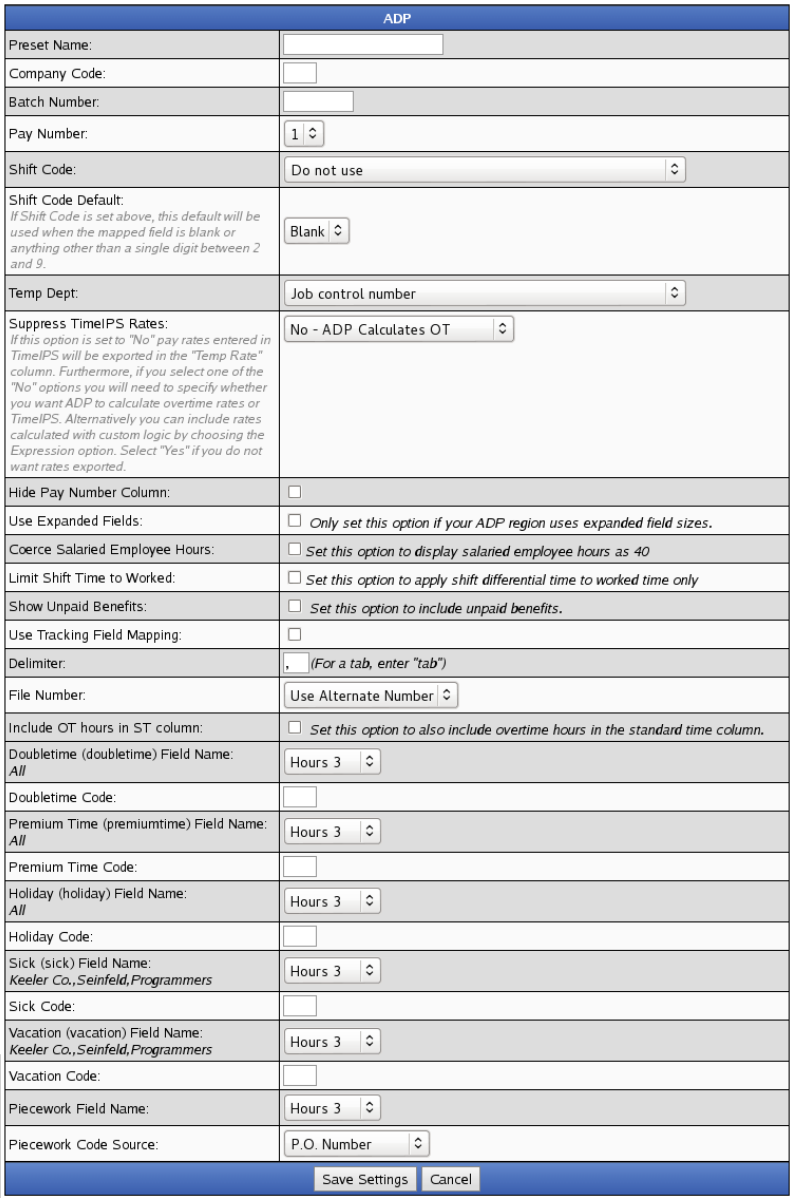
1. Select either **ADP PayExpert** or **ADP PC/Payroll 5.1** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **ADP** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

The preset window will appear.



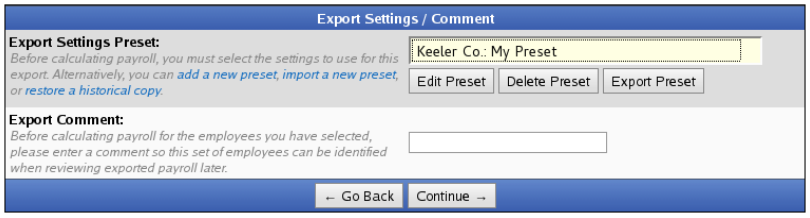
The following export settings should be defined prior to running your ADP export:

- **Preset Name:** Enter the name you wish to assign to the preset.
- **Company Code:** Your ADP assigned Company Code; column is included in the payroll export and used to name the exported file
- **Batch Number:** Value used by ADP to represent a new batch of payroll data in order to prevent duplicate records on subsequent imports
- **Pay Number:** The Pay Number code defined by ADP
- **Hide Pay Number Column:** Select "Yes" to remove the Pay Number column in the export file; select "No" to include the column in the export file with the value defined in the "Pay Number" field above.
- **Use Expanded Fields:** Only set this option if your ADP region uses expanded field sizes.
- **Use Custom Field Mapping:** *Contact TimeIPS Support for assistance in using this feature.*
- **Delimiter:** A comma is the default setting. Enter "tab" to use a tab delimiter.
- **File Number:** Your options are "Alternate Number", "ID/Badge Number" and "Social Security Number (SSN)"

NOTE: Doubletime, holiday, sick, and vacation hours must be idenfied in ADP as "Hours 3" or "Hours 4" and given a unique identifying pay code. Those settings, as defined in your ADP application, will be identified in the Pay Code Name and Pay Code in TimeIPS.

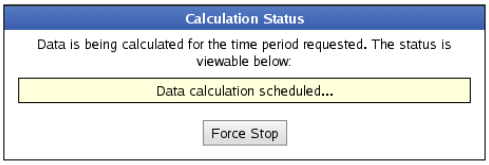
- **Doubletime Field Name:** Define whether Doubletime hours are coded as "Hours 3" or "Hours 4" in ADP
- **Doubletime Code:** Enter the Code used to define Doubletime hours
- **Deferred Holiday Field Name:** Define whether Deferred Holiday hours are coded as "Hours 3" or "Hours 4" in ADP
- **Deferred Holiday Code:** Enter the Code used to identify Deferred Holiday hours
- **Holiday Field Name:** Define whether Holiday hours are coded as "Hours 3" or "Hours 4" in ADP
- **Holiday Code:** Enter the Code used to identify Holiday hours
- **Sick Field Name:** Define whether Sick hours are coded as "Hours 3" or "Hours 4" in ADP
- **Sick Code:** Enter the Code used to identify Sick hours
- **Vacation Field Name:** Define whether Vacation hours are coded as "Hours 3" or "Hours 4" in ADP
- **Vacation Code:** Enter the Code used to identified Vacation hours

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

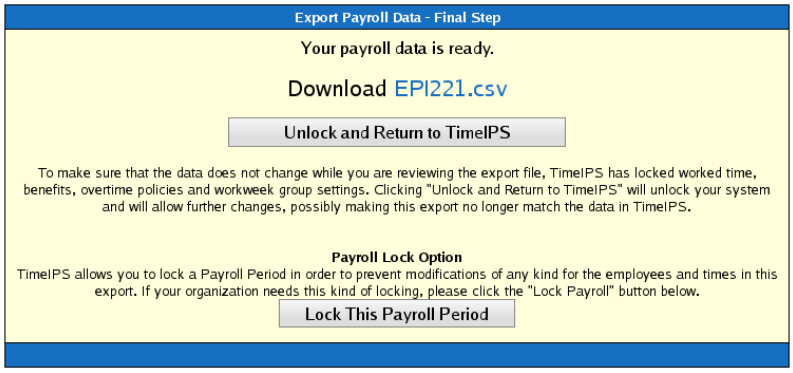


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

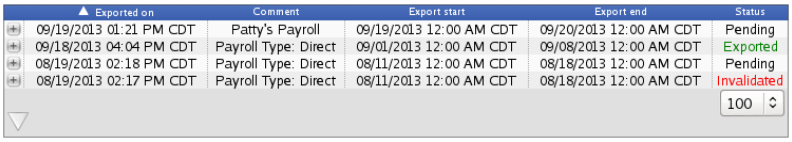


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

Internal Information (visible to Administrators only):

The "use custom field mapping" option has very specific use cases originall for a specific customer (mayber Sleep Services). See mantis issue http://mantis.timeips.com:411/view.php?id=1182

If custom fields are enabled when you edit the preset, all of the remote fields can be enabled
For each field, user can:
  Identify field as Hours 3, Hours 4, Earnings 3,Earnings 4, or Earnings 5
  Define Pay code for each field
  Define value for each fields' corresponding "amount" column
  Identify the pay method of each differential as Per Hour, Per Work Day, or per Pay Period

Each differential is per employee:
  Per Hour:
    Only exports field once per 60 minutes

Per work day:
Only exports field for the first occurrence in the work day
Work day specified by a user's work week

Per pay period:
Once per export
It is up to the user to manage the following cases:
If a single export covers mutliple pay periods, field will still only be allowed once for the entire export.
If a N exports collectively cover one pay period, field will be allowed once per export (and therefore, N times for that pay period).

There's one other major difference between this export and a standard ADP export - in this export, each clock will be a separate row in the export, instead of summing for the entire user

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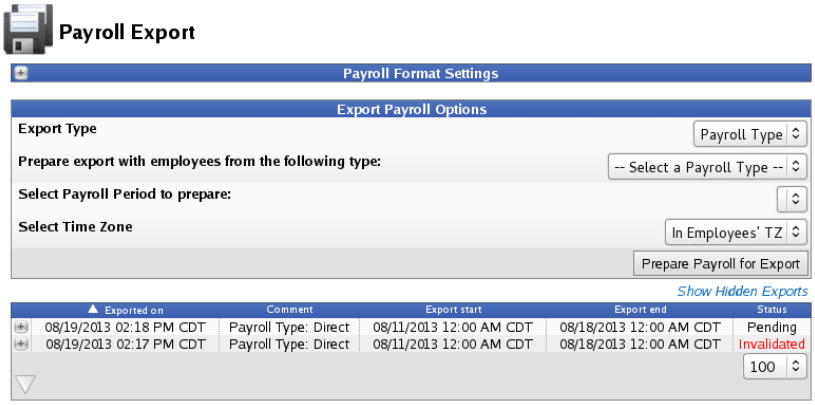
Ceridian Insync Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. The file can be opened in a spreadsheet application, such as Microsoft Excel or OpenOffice Calc. Using the Enhanced Payroll Integration (IPSEPI) optional module, the file can be imported in your Ceridian Insync payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

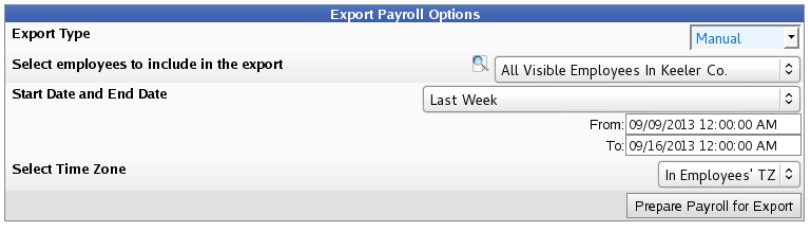
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

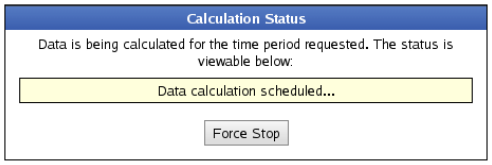
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

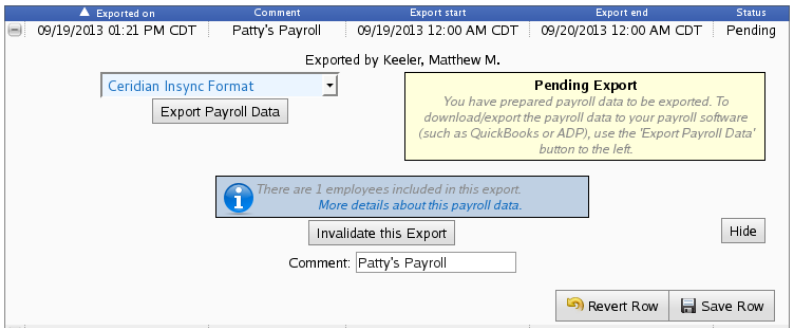


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



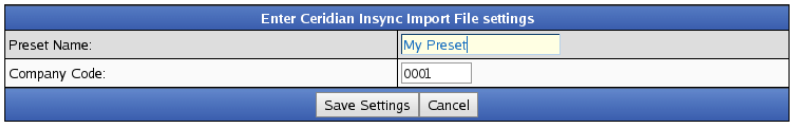
1. Select **Ceridian Insync Format** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Ceridian Insync** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

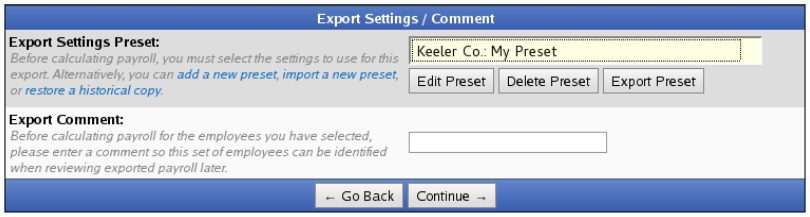
The preset window will appear.



The following export settings should be defined prior to running your Ceridian export:

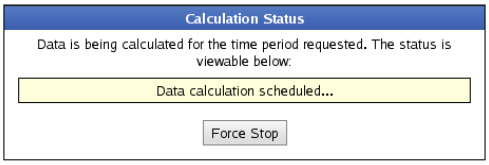
- **Preset Name:** Enter the name you wish to assign to the preset.
- **Company Code:** Your Ceridian assigned Company Code. This column is included in the payroll export and used to name the exported file.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

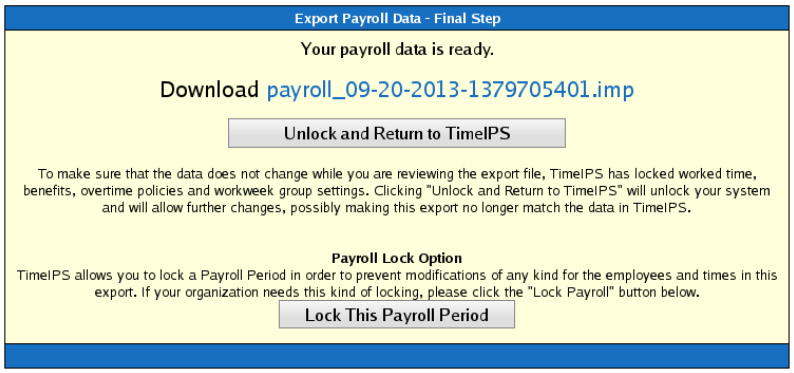


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

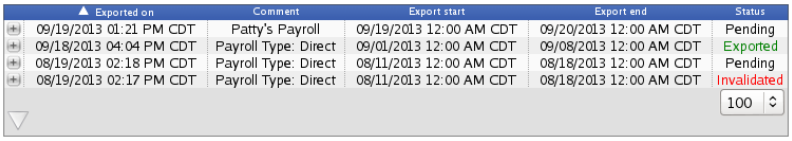


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

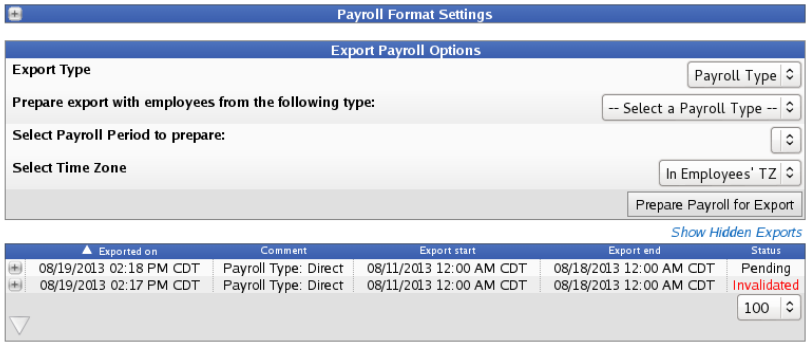
100

Creative Solutions Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, the file can be imported in your Creative Solutions payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export

Payroll Export



Before you export:

- A 4-digit Alternate Number must be assigned to each employee.
- A 2-digit numeric Department Code is required.

Prepare Payroll for Export

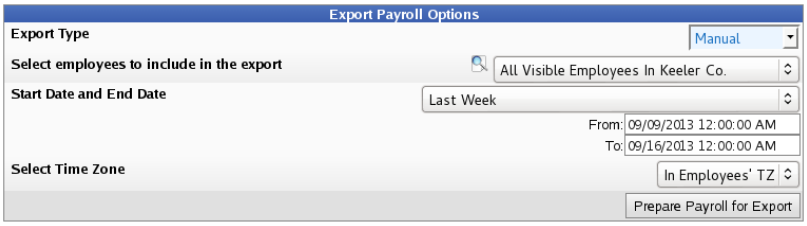
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

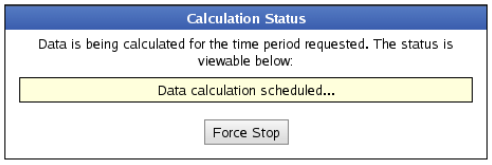
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

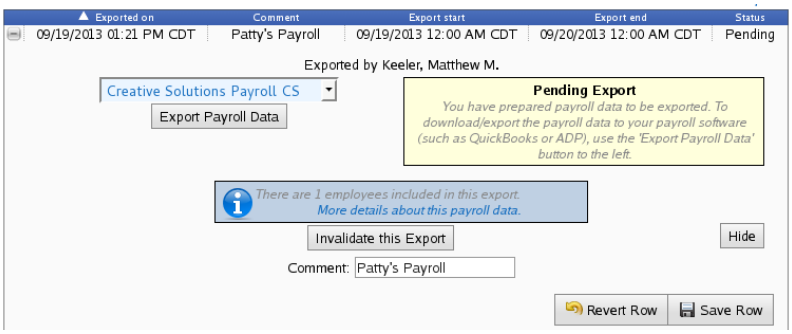


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Creative Solutions Payroll CS** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

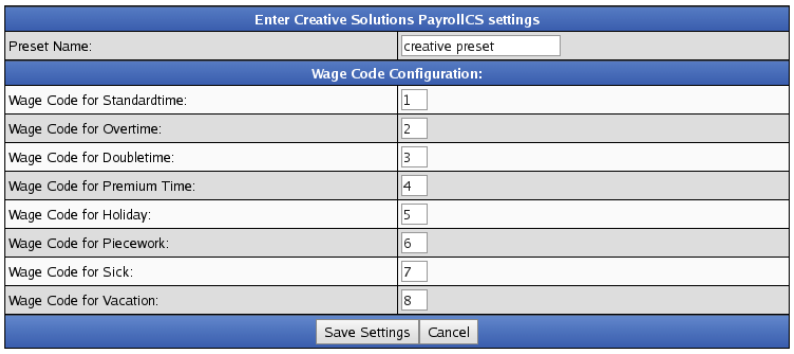
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Creative Solutions** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

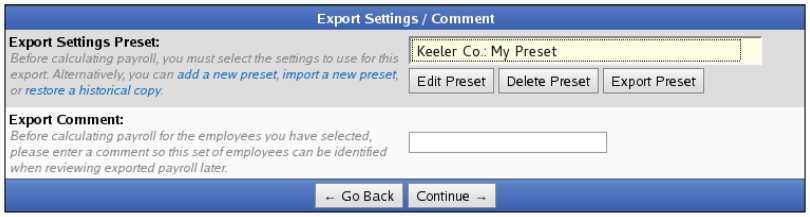
The preset window will appear.



The following export settings should be defined prior to running your Creative Solution export:

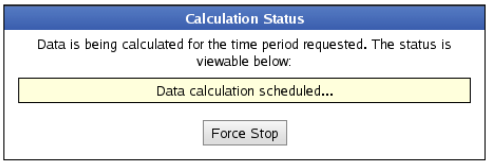
- **Preset Name:** Enter the name you wish to assign to the preset.
- Modify the **Wage Codes** if needed.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

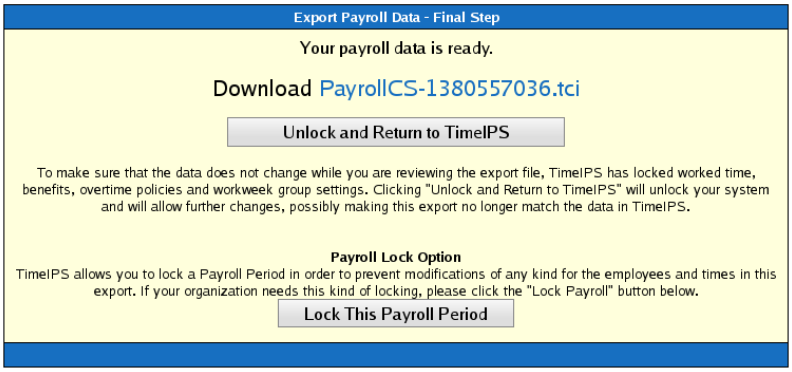


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

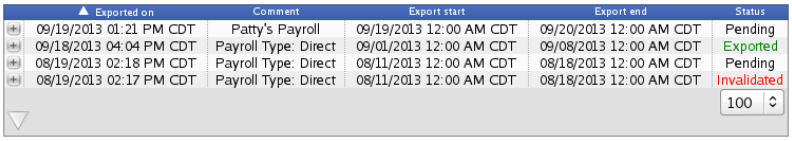


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

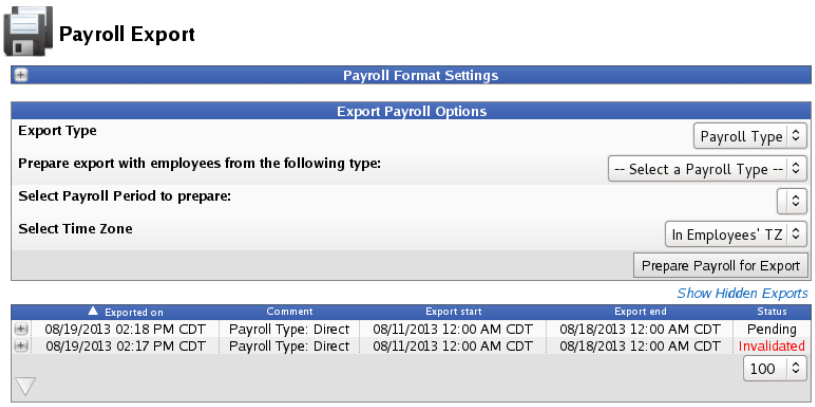
See Also:
Payroll Export (TimeIPS Version 1.11)

Custom Reporting/Payroll Export Settings

The TimeIPS Custom Payroll/Report Engine allows users to define the characteristics and contents of the file including the file extension, number of columns, field delimiter, line terminator, and data output. Custom Payroll requires the IPSCPE Customizable Payroll Export module (included in the IPSEPI Extended Payroll Integration module), the defined file can be generated then imported in your payroll application. Custom Reporting requires the IPSRPT Custom Report Module.

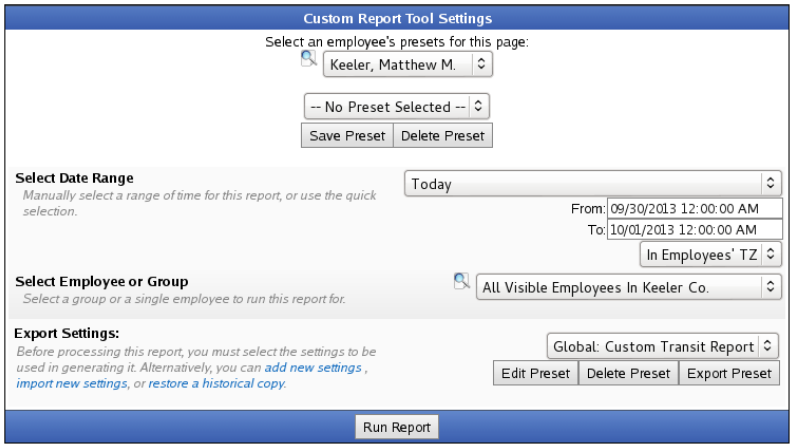
For Payroll:

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



For Custom Report:

Using the left pane Main Menu » Administration, click on: Reports » Custom Report



Before you export:

- Obtain the file layout requirements, including the field level detail, that your payroll application will import. You can obtain this information from your payroll application's help documentation or support resources. This document should specify the data fields (columns of information) to be included in the file generated from TimeIPS.

EXAMPLE A: Landon Payroll Application provided the following file layout requirements:

Name	Description	Data Type	Required?	Example
File #	Unique number that identifies employee	Numeric	Y	46228
Emp Name	Employee's Name	Text	N	Jones Mark
Payroll Date	Payroll Period End Date	Date (YYYYMMDD)	Y	20070420
Emp Division	Division (Location) Code employee is assigned to	Text	N	557
Reg Hrs	Regular labor hours worked	Numeric	Y	40
O/T Hrs	Labor hours worked; paid at 1.5 times normal rate	Numeric	N	3.48
Sick Hrs	Sick hours used	Numeric	N	8
Vacation Hrs	Vacation hours used	Numeric	N	8
Holiday Hrs	Holiday hours paid	Numeric	N	8

- Map the available TimeIPS fields to each required field included in the file layout.

EXAMPLE A2: TimeIPS contains several employee fields that can store a unique identifier as the "File #" including the employee's "ID/Badge Number," "Alternate Employee Number," or "SSN." In this example, we will enter the Landon Payroll Application's Employee "File #" as the TimeIPS "Alternate Employee Number." The "Emp Division" field is not a default field in TimeIPS. However, there are a number of employee fields that can store the data and be mapped as the "Emp Division." In this example, we will enter the employee's "Division Code" in TimeIPS's "Department" field. The "File #" will be mapped to the "Alternate Employee Number" and the "Division Code" will be mapped to the TimeIPS's "Employee Department" field in your custom payroll export preset's Column tab.

Name	Description	Data Type	Required?	TimeIPS Field	Example
File #	Unique number that identifies employee	Numeric	Y	Alternate Employee Number	46228

Emp Name	Employee's Name	Text	N	Employee's Name (Last, First Mid)	Jones, Mark
Payroll Date	Payroll Period End Date	Date (YYYYMMDD)	Y	Enter Payroll End Date	20070420
Emp Division	Division Code (Location) employee is assigned to	Text	N	Employee's Department	557 (code for North Branch)
Reg Hrs	Regular labor hours worked	Numeric	Y	Calculated by TimeIPS	40
O/T Hrs	Labor hours worked; paid at 1.5 times normal rate	Numeric	N	Calculated by TimeIPS	3.48
Sick Hrs	Sick hours used	Numeric	N	TimeIPS Benefit Hours	8
Vacation Hrs	Vacation hours used	Numeric	N	TimeIPS Benefit Hours	8
Holiday Hrs	Holiday hours paid	Numeric	N	TimeIPS Benefit Hours	8

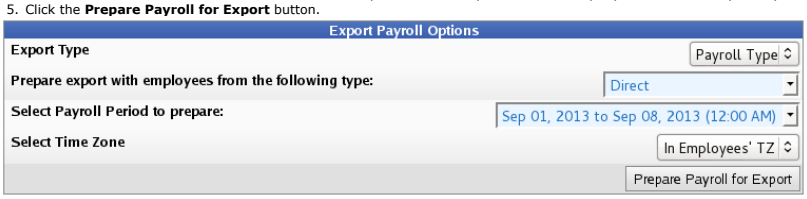
- Once you have the file format you wish TimeIPS to generate, you are ready to build your custom preset.

Prepare Payroll for Export

First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

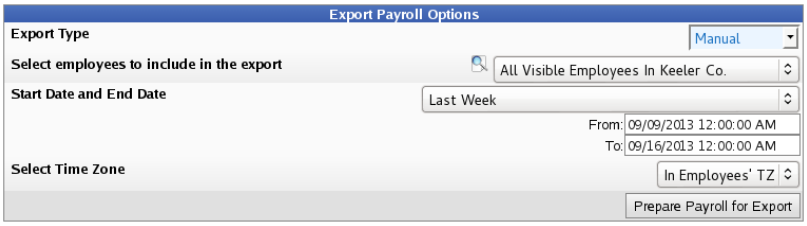
Payroll Type

1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

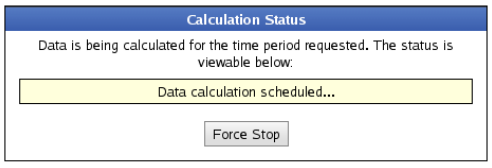


Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.) Select employees and a range of time.
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

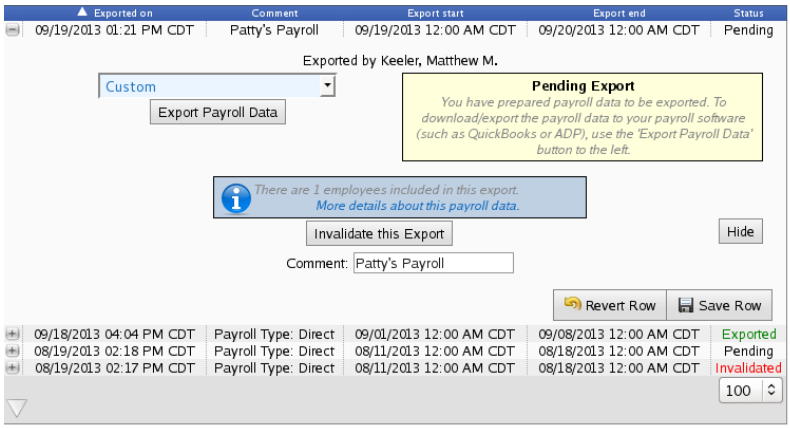


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Custom** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

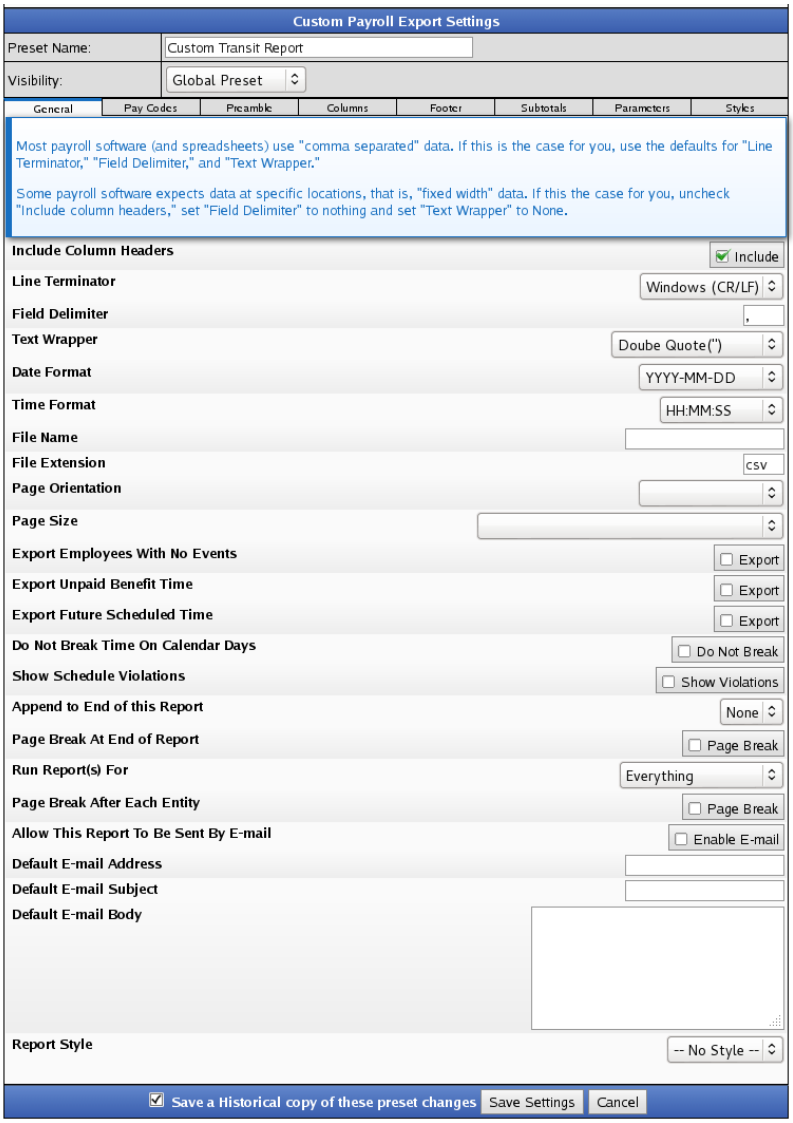
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Custom** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

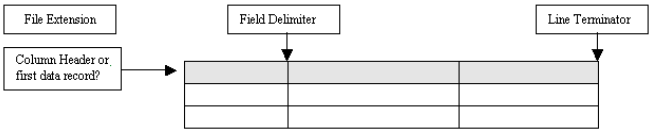
NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

The preset window will appear with 8 tabs of customizable information.



The General Tab

The **General tab** defines information about the format of the file.



The following export settings should be defined prior to running your Custom export:

- Check **Include Column Headers** if the first row of data contains labels for each column.

  TIP: Most payroll applications that import delimited files (such as comma, tab, or special character delimiters) can include column headers and will ignore the first row. This allows you to preview the file with the label for each field identified in the first row before importing the file into your payroll application. You can preview the generated file in a spreadsheet application (for delimited files) or word processing application (for fixed length files).

- The **Line Terminator** defines a special character at the end of a row (line) of data in the file.

  TIP: The CR/LF (Carriage return/Line Feed) is the most common as it is used by Microsoft Operating Systems by default. If you are unsure, select your operating system (Windows, Macintosh, or Unix).

  Most payroll software (and spreadsheets) use "comma separated" data. If this is the case for you, use the default for Line Terminator.

- A **Field Delimiter** is a character that separates each piece of data in the file.

  TIP: A CSV (Comma Separated Value) file uses a comma. A tab separated file uses a tab. A fixed length file does not use a Field Delimiter.

  Most payroll software (and spreadsheets) use "comma separated" data. If this is the case for you, use the default for Field Delimiter.

- The **Text Wrapper** indicates the type of quotations, if any, to use for identifying text output.

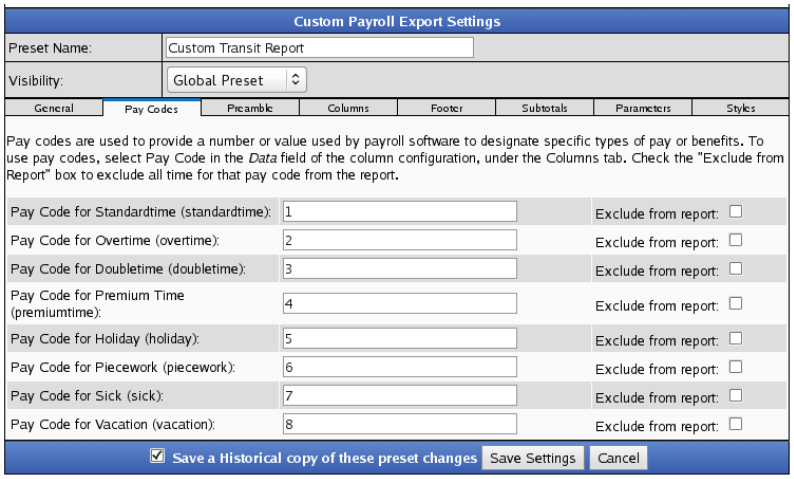
  Most payroll software (and spreadsheets) use "comma separated" data. If this is the case for you, use the default for Text Wrapper.
- If the file includes dates, select the **Date Format** to use.
- If the file includes times, select the **Time Format** to use.
- The **File name** is the name of the generated file. Leave it blank for default. Include [date] for date, [time] for time or [note] for note.
- The **File extension** defines the file type and may associate the generated file with an application. A Comma Separated Value file's extension is "CSV." A fixed length file is generally "txt." If your payroll application does not specify the file extension, use "CSV" for files using a Field Delimiter of a comma (,) and "TXT" for any other file type. By default reports are generated as flat text files. Choose one of "xls", "xlsx", "pdf", or "html" to ouput the report using advanced styling.
- Select the **Page Orientation**. Reports using advanced styling can be generated in either Landscape or Portrait orientation. Reports with many columns will fit better in Landscape.
- Reports using advanced styling can specify the **Page Size** for the generated file.
- Check the **Export Employees With No Events** box to include every employee in your selection at least once even if they have no payroll events in the report range.
- Check the **Export Unpaid Benefit Time** box to include benefit time that is part of a benefit type that is marked as unpaid. Uncheck to exclude these benefit events.
- Check the **Export Future Scheduled Time** box to include scheduled time for the employee as payroll events. This option is only honored in Custom Report. It is not available on Payroll Exports.
- A single event will be split into multiple events when it is sent to the report output. Splits happen on changes in rate, shift, holiday, overtime status and calendar days. Check the **Do Not Break Time On Calendar Days** box to prevent events from being split on calendar days. Available for Custom Report only. Not available on Payroll Exports. With appended reports the setting of the initial report will apply to all.
- Check the **Show Schedule Violations** box to Include additional rows for each schedule violation. Available for Custom Report only. Not available on Payroll Exports. With appended reports the setting of the initial report will apply to all.
- The **Append to End of this Report** option will allow an additional custom report to run immediately after this report. For example, this might be a summary report that you want to be followed by a more detailed report. NOTE: The drop down menu will contain the titles of each Custom preset you create (such as this one). If no custom presets have been created, 'None' is the only option.
- Enable the **Page Break At End of Report** option by checking the Page Break box. This option is useful for reports that will append other reports.
- Under most circumstances, choose to **Run Report(s) For** "Everything", This generates one consolidated report.
  Under special circumstances, you may need to Run the Report For each Employee, each Organizational Unit, each Job, or each Work Order. For example, if you have 10 employees, the report will run 10 times, one for each employee, and appends them to each other.

Please NOTE: Running individual entities instead of running "Everything", significantly increases memory requirements and slows down processing time. For large quantities, the report may not be able to complete. (With appended reports, the settings for the initial report applies to all.)

- If using the previous option to run this report once for each entity, you can enable this option to force a **Page Break After Each Entity**.
- To **Allow This Report To Be Sent By E-mail**, check the Enable Email box. After running this payroll export, you will be prompted to email the report to a specified address. (Payroll Exports only)
- If you Allow This Report To Be Sent By E-mail, type in the **Default E-mail Address**. When you e-mail the report, this address will be used by default. (Payroll Exports only)
- If you Allow This Report To Be Sent By E-mail, type in the **Default E-mail Subject**. Template options include [date], [endDate], [employeeCount], [exportComment], [exporterName], [fileName] and [presetName] (Payroll Exports only)
- This is the body that will be included by default. Template options are the same as the default subject (Payroll Exports only)
- Optional: Select a **Report Style** that you created on the **Styles** tab. This style will be applied to every cell in the report. It is best suited for applying low weighted options that can be overridden in particular cells.

The Pay Codes Tab

The Pay Codes tab associates each type of earning or pay with a specific name or numeric code for identification in your payroll application.

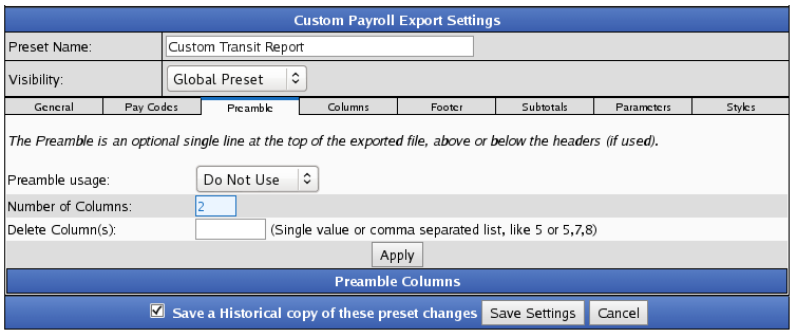


EXAMPLE: In the screen shot above, standard time hours will be designated with code 1, overtime with code 2, and so forth. In that way, all hours can be included in a single column with a specific code (or name, such as "Hourly" and "Overtime") identifier.

NOTE: The Landon Payroll Application file requirements from example A separate each pay type into its own row. Therefore, the pay codes will not be used.

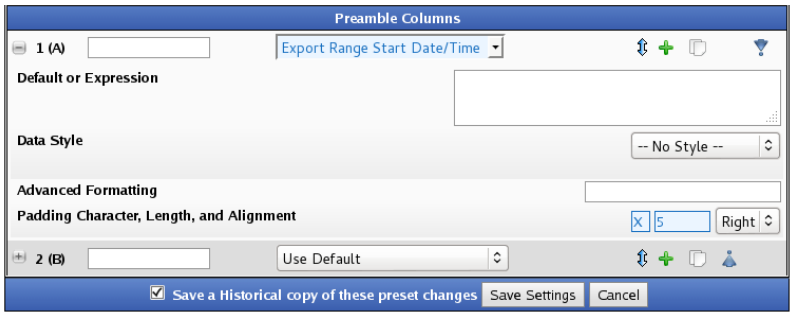
The Preamble Tab

The **Preamble tab** defines file heading rows that include summary data about the file. Unless preamble records are specified in the file layout requirements provided by your payroll application, leave the default value at "Do Not Use".



NOTE: Most payroll applications do not require a preamble.

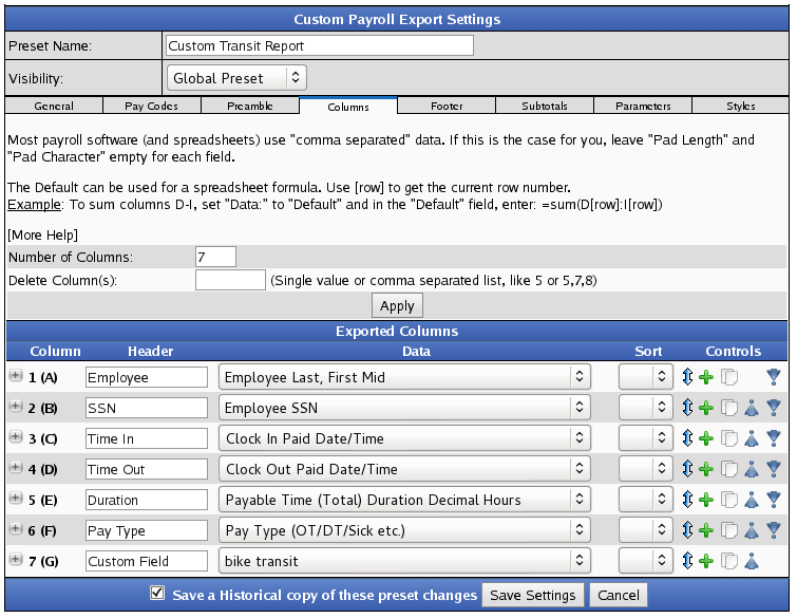
- To add a Preamble, enter the **Number of Columns** and click the **Apply** button.

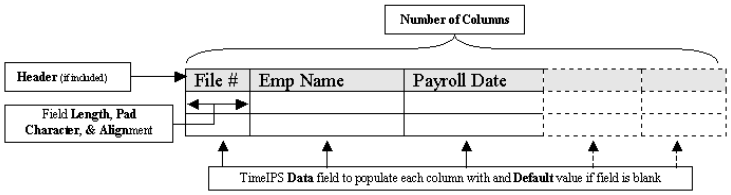


- Click the **+** (plus) sign to the left of the column number to expand the window.
- In the field to the right of the cell identifier (shown as "1 (A)" in the above example), enter that columns **header**.
- From the drop down menu, choose the information that will be displayed in the preamble. (In the example above, the Export Range Start Date/Time will appear as the preamble.)
- If there are multiple preambles, click and drag the blue arrow icon to **re-order** them.
- To **insert a new column** after this one, click the green plus sign .
- To **duplicate** this column, click the double paper icon .
- To **move to the bottom** of multiple preambles, click the blue dot/arrow icon .
- If the value of Data is blank and set to Default, then the report uses the value from the **Default or Expression** field. If Data is set to Expression then the report pulls the expression from the **Default or Expression** field.
- Select the advanced **Data Style** to apply to data in this column. Options include all named styles, the same style as other columns, or a style chosen through a custom logic expression.
- Filter text through an **Advanced Formatting** pattern. For more details view the TimeIPS Knowledge Base.
- Enter in a **Padding Character, Length, and Alignment** on fixed width reports. Select the character to pad with, the length to pad this column, and whether to align data to the left or right of the assigned width. (In the example above, X is the Padding Character and 5 is the Length. This Length restricts the preamble to be only 5 characters long.)

The Columns tab

The Columns tab defines the number of columns, the format for each column, and the data contained in each.





- The **Number of Columns** defines the number of data fields included in the export.

If you wish to **ADD MORE** blank columns:

- Enter the new **Number of Columns**.
- Click on **Save Settings**.
- Edit your preset again and the new columns will be available.

EXAMPLE: The default preset selected includes 6 columns. The payroll file layout requires 3 additional fields at the end. Therefore, adjust the "Number of Columns" to 9, "Save Settings," and edit your preset again.

If you wish to **DELETE** an existing column:

- Enter the column number(s) in the the **Delete Column(s)** field.
- Click on **Save Settings**.
- Edit your preset again and the columns will be deleted.

NOTE: You do not need to adjust the # of columns as TimeIPS will automatically adjust them based on the duplicated/deleted columns entered.

If you wish to **MOVE** a column:

- Click and hold on the drag and drop icon .
- Now drag the column to where you want it to show up in the custom export.
- Release your mouse button.

or

- Click on the move icon .
- This will move the column up one spot or down one spot depending on the direction of the arrow.

If you wish to **INSERT A SINGLE** blank column:

- Click and hold on the drag and drop icon .
- This will insert a new column directly below the column you chose the icon from .

If you wish to **DUPLICATE A SINGLE** column:

- Click on the duplicate icon .
- This will duplicate the column directly below the column you chose the icon from .

- The **Header** defines the name of the column. If "Include Column Headers" is checked on the General tab, the first row of the generated file will contain Column Headers, otherwise, the first row will be the first data record/row.

- **Pad Character** defines the character to use in order to pad fixed length fields. Generally, fields are padded with a "0" or a space. For space padding, type a space in the Pad Character field.

- **Length** defines the maximum length of a field. Fixed length fields will be truncated or padded to the defined Length. Delimited fields will be truncated to the Length.

- **Align** defines how data is aligned in a fixed length field.

EXAMPLE: The Employee name "Thomas-Jones, Michael Anthony" will be output based on the column settings as indicated in the table below. Do note that text fields are generally padded with spaces. "x" is used in this example to provide a better visual explanation of the available settings:

Length	Pad	Align	Output
20	x	Left	Thomas-Jones, Michae
20	x	Right	nes, Michael Anthony
40	x	Left	Thomas-Jones, Michael Anthonyxxxxxxxxxxx
40	x	Right	xxxxxxxxxxThomas-Jones, Michael Anthony

- The **Data** field defines the contents of the column – the TimeIPS field to output in this column.

- The **Default** data will be used if the selected "Data" field is blank.

EXAMPLE: Job Code is mapped into a column. If employee's do not specific a job code when clocking in, their time should be billed to the job code 1511. The "Data" field should be mapped to the "Job Code" and the "Default" should be "1511."

- If **Total** is checked, the data will be summarized for each record of matching information.

EXAMPLE: Below is the column data for a file without totals:

Record #	Employee Name	Date	Job Code	Reg Hrs	O/T Hrs
1	Jones Mark	2007-06-04	84005	3	0
2	Jones Mark	2007-06-04	84005	1	0
3	Jones Mark	2007-06-04	37121	4	0
4	Jones Mark	2007-06-05	84005	3.5	.5

EXAMPLE: Below is the same column data for a file with Total selected for the Reg Hrs field. Note that the Regular hours were totaled from the first and second records because the employee name, date, and job code were the same. The third row was not totaled because the job code was unique, and the fourth record was not totaled because the date was unique.

Record #	Employee Name	Date	Job Code	Reg Hrs	O/T Hrs
1	Jones, Mark	2007-06-04	84005	4	0
3	Jones, Mark	2007-06-04	37121	4	0
4	Jones, Mark	2007-06-05	84005	3.5	.5

- If **Clear Duplicate** is checked, the data in the column will be cleared if it's the same as the row(s) above. This is used, for example, to clear the employee's name for all rows after the first row to improve the appearance and readability of the report.

Notes on Payable Time Duration

- The "Other Payable Time Duration" column will display all hours NOT shown in other columns for specific pay types. For example, if your export includes a column for Standard Time, then standard time will be removed the from the total time shown by "Other Payable Time Duration."
- The "Total Payable Time Duration" column will display all hours, even if shown in other columns in the export.

Notes on Payable Rates

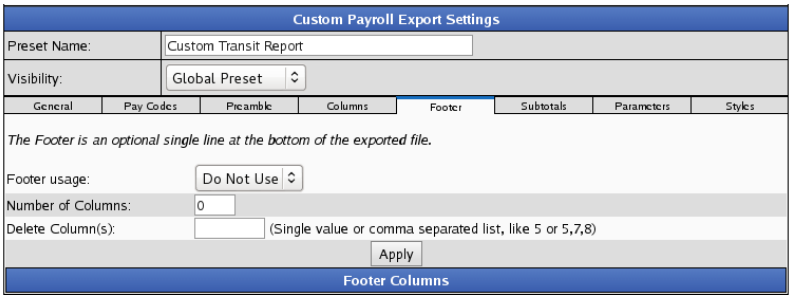
- Payable Hourly Rate (base, no modifiers): This is the employee's base hourly rate as entered on the employee tab. This is the raw rate without any kind of differentials, overrides, overtime, etc. applied.
- Payable Hourly Rate (diff/override): This is the employee's base hourly rate as above, plus any differentials or overrides due to jobs or per-event modifiers, but still without any overtime/doubletime/premiumtime multiplication.
- Payable Hourly Rate (diff/override and OT/DT/PT): This is what is used to actually pay an employee. It's the employee's base hourly rate, plus any differentials or overrides due to jobs or per-event edits, multiplied by overtime/doubletime/premium time multipliers, if applicable. For FLSA compliance, when in overtime/doubletime/premiumtime, this amount is at least the Payable FLSA Weekly Base Hourly Rate times the OT/DT/PT multiplier.
- Payable FLSA Weekly Base Hourly Rate: This is the FLSA Weekly Base Hourly Rate used to figure OT/DT/PT minimums for the entire week. For example, if an employee works 20 hours at $10/hour, then 20 hours on a job that pays $20/hour, then 10 more hours at $10/hour, FLSA requires that the 10 overtime hours be paid at 1.5x the employee's FLSA base rate, calculated as the total base pay for the week divided by total hours for the week. In this example: 20 x $10 + 20 x $20 + 10 x $10 = $700 / 50 = $14. So, the pay for the 10 OT hours must be a minimum of $14 * 1.5 = $21/hour.

Notes on Removing Rows

Any row that contains any field that evaluates to or consists of nothing but the keyword "action_remove_this_row" will cause the entire row to be removed. This is useful in cases where specific types of time, pay, jobs, workorders, etc. should be excluded from the report.

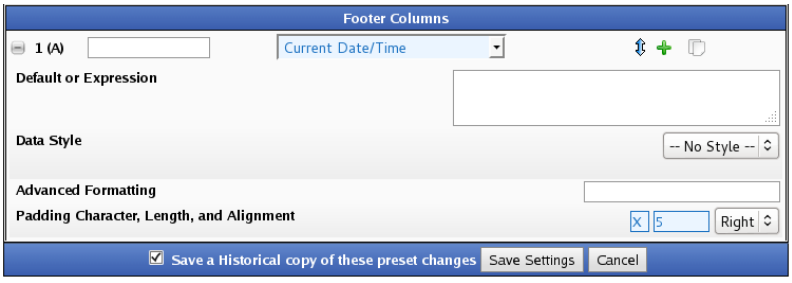
The Footer Tab

The **Footer tab** defines file footer rows that include summary data about the file. The Footer is an optional single line at the bottom of the exported file.



NOTE: Most payroll applications do not require a footer.

Unless Footer records are specified in the file layout requirements provided by your payroll application, leave the default value at "Do Not Use".

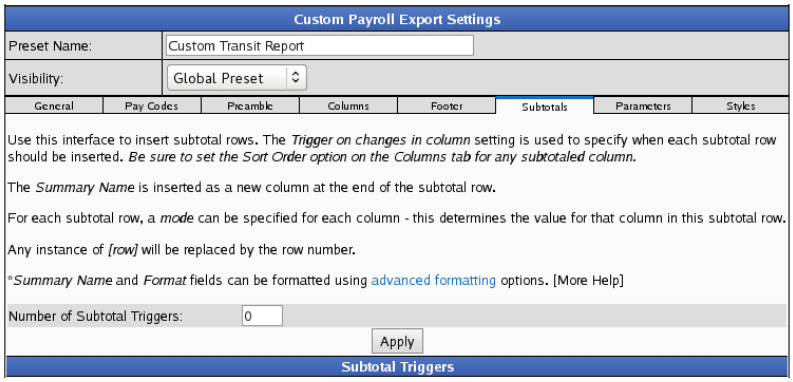


- Click the **+** (plus) sign to the left of the column number to expand the window.

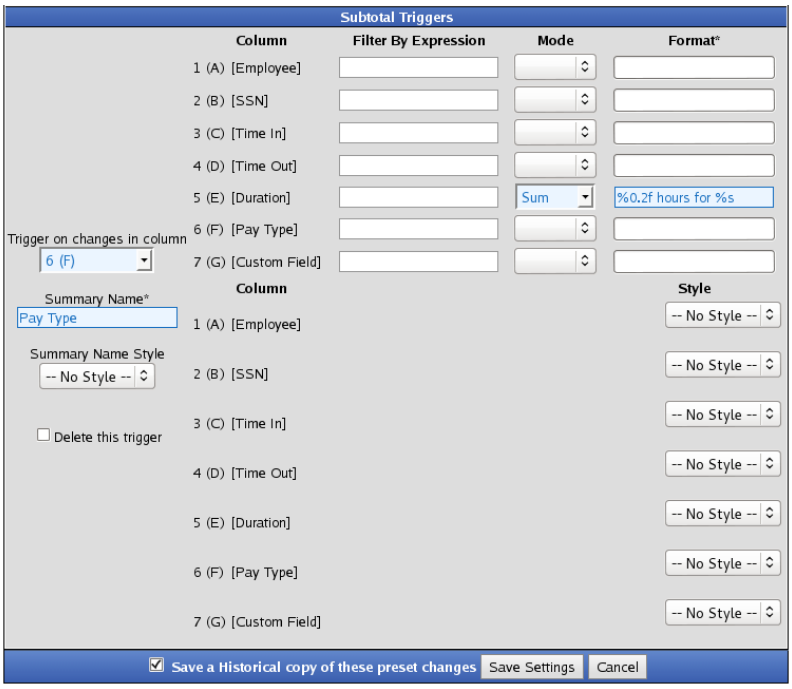
- In the field to the right of the cell identifier (shown as "1 (A)" in the above example), enter that columns **header**.
- From the drop down menu, choose the information that will be displayed in the footer. (In the example above, the Current Date/Time will appear as the footer.)
- If there are multiple footers, click and drag the blue arrow icon to **re-order** them.
- To **insert a new column** after this one, click the green plus sign .
- To **duplicate** this column, click the double paper icon .
- If the value of Data is blank and set to Default, then the report uses the value from the **Default or Expression** field. If Data is set to Expression then the report pulls the expression from the **Default or Expression** field.
- Select the advanced **Data Style** to apply to data in this column. Options include all named styles, the same style as other columns, or a style chosen through a custom logic expression.
- Filter text through an **Advanced Formatting** pattern. For more details view the TimeIPS Knowledge Base.
- Enter in a **Padding Character, Length, and Alignment** on fixed width reports. Select the character to pad with, the length to pad this column, and whether to align data to the left or right of the assigned width. (In the example above, X is the Padding Character and 5 is the Length. This Length restricts the footer to be only 5 characters long.)

The Subtotals Tab

The **Subtotals tab** allows you to create subtotal in the custom pay export.



- Type in the the number of subtotals you would like in the **Number of Subtotal Triggers:** field.
- Click the **Apply** button and the **Subtotal Triggers** window will expand.



The **Subtotal Triggers** define what information will have a subtotal.

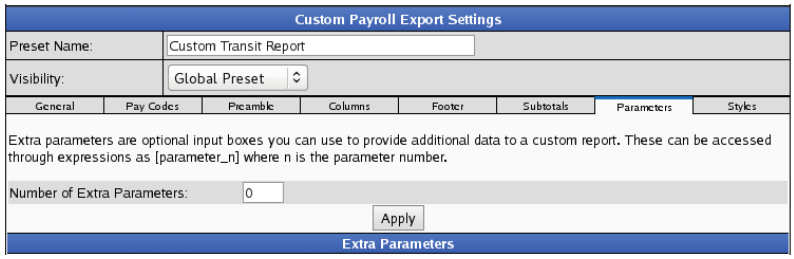
- **Trigger on changes in column** is used to specify when each subtotal row should be inserted. Be sure to set the Sort Order option on the Columns tab for any subtotaled column.
- **Summary Name*** is inserted as a new column at the end of the subtotal row. You can use advanced formatting or it can be any value you would like. Example: If you are subtotaling total hours worked for a pay period, you could call it Worked Time.
- **Summary Name Style** defines the appearance of the Summary Name. For example, if you want the Summary Name to be bold and red, you can create and assign that style to it.
- **Column** tells you the name of the column in the custom payroll export.
- **Mode** allows you to choose a function for each column and thus determines the value for that column in the subtotal row.
  - **Sum** sums the information in the column by the defined trigger.
  - **Mean** is the arithmetic average of a set of values,
  - **Median** is the number separating the higher half of a sample from the lower half.
  - **Mode** is the element that occurs most often.

- **Min** is the minimum number in the range.
- **Max** is the Maximum number in the range.
- **Count** counts the number of values in a range.
- **Distinct** counts the number of unique values in a range.

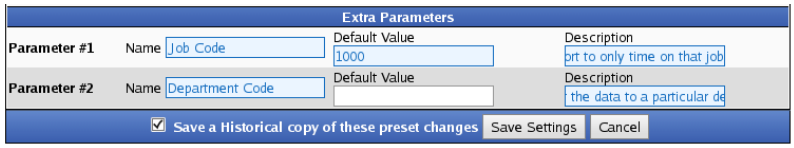
- **Format*** allows you to use advanced formating.
- **Style** defines the appearance of Column Name.

The Parameters Tab

Extra parameters are optional input boxes you can use to provide additional data to a custom report. These can be accessed through expressions as [parameter_n] where n is the parameter number. This is not available for Payroll Export, only for Custom Reporting.



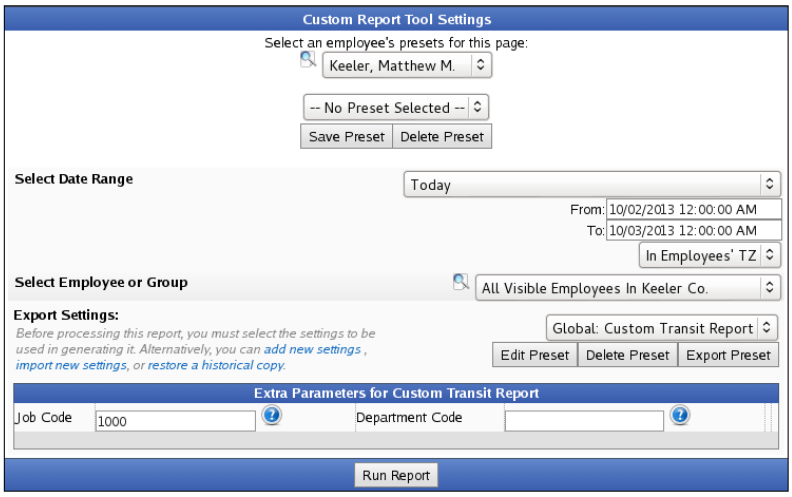
- Type in the the **Number of Extra Parameters** you would like to add.
- Click the **Apply** button and the **Extra Parameters** window will expand.

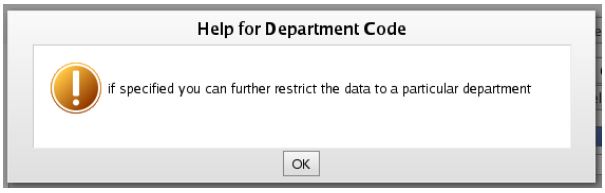


- Add a **Name**, **Default Value**, and **Description**.

NOTE: The Extra Parameters will appear on the bottom of the Custom Reporting Page as seen below. The Description is visable as "help" if you click on the blue question mark next to the parameter.

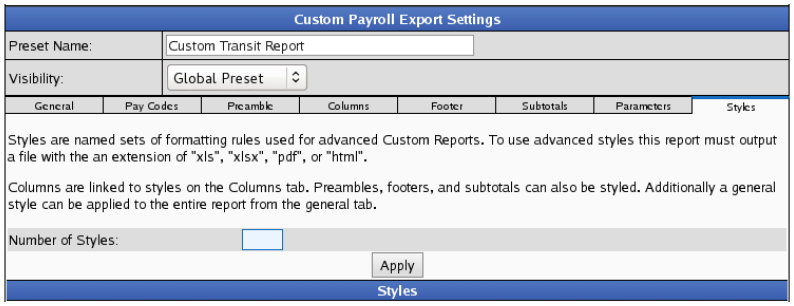
Custom Report



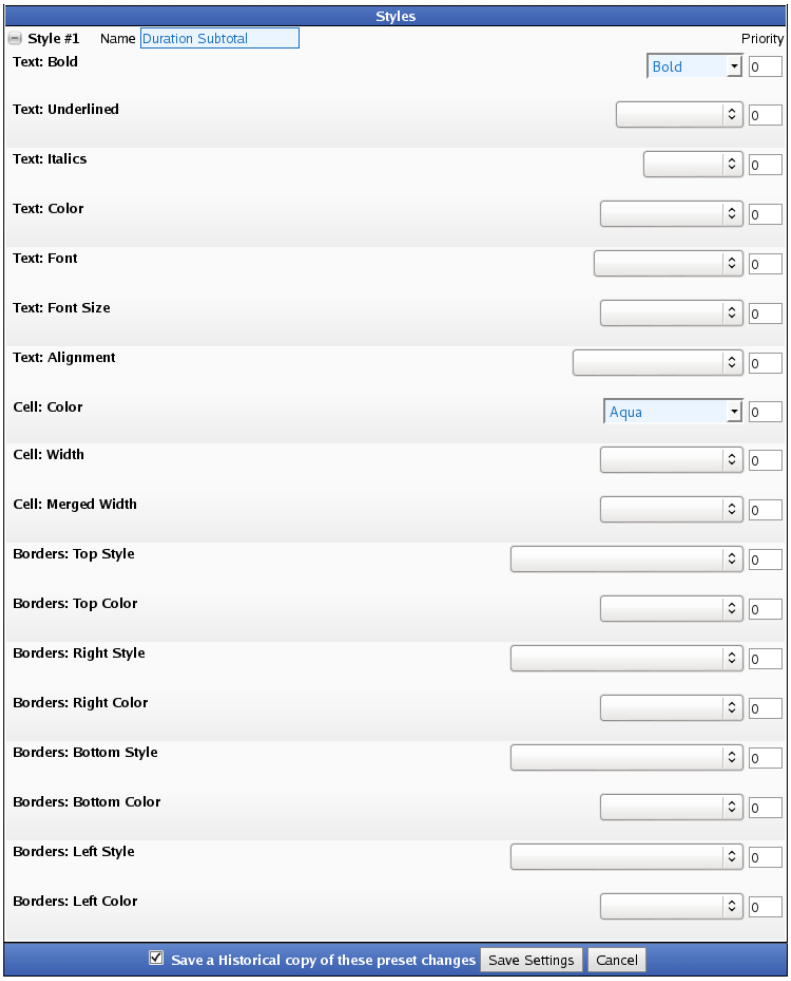


The Styles Tab

Styles are named sets of formatting rules used for advanced Custom Reports. To use advanced styles this report must output a file with the an extension of "xls", "xlsx", "pdf", or "html".



Columns are linked to styles on the Columns tab. Preambles, footers, and subtotals can also be styled. Additionally a general style can be applied to the entire report from the general tab.

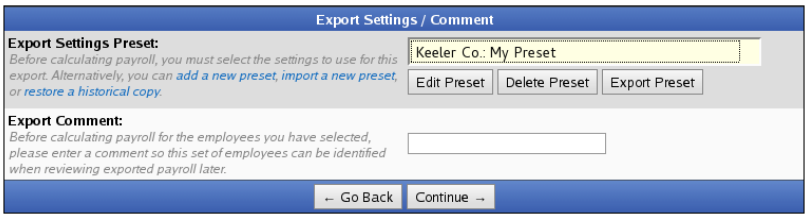


- Click the **+** (plus) sign to the left of the Style number to expand the window.
- **Name** the style.
- Use the drop down menus to define the characteristics of the style.

In the EXAMPLE above: Style #1 will be used to display the Duration Subtotal with BOLD text inside an AQUA cell.

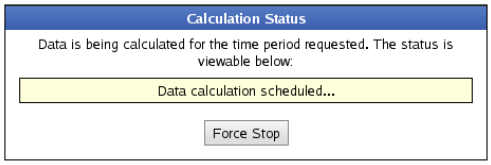
- If some characteristics take presidence over others, change the **Priority** value. The smaller the number, the higher the priority.

Once your preset has been configured, click on "Save Settings" to save, or "Cancel" to exit without saving.

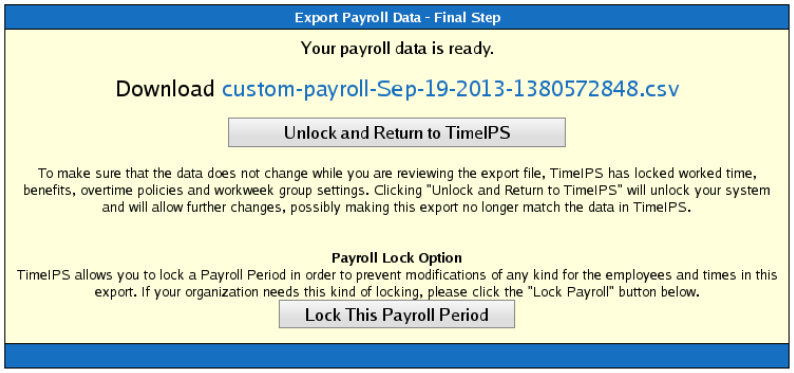


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

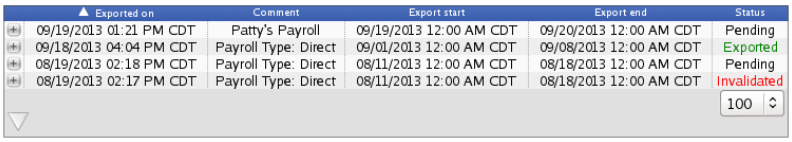


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Cancel, return to TimeIPS", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Yes, the export was accepted", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

For immediate assistance with any of the above payroll exports, call our Customer Support staff at 877-846-3256.

See Also:
Payroll Export (TimeIPS Version 1.11)
Advanced Formatting for Custom Payroll

Advanced Formatting for Custom Payroll

TimeIPS custom payroll export supports advanced formatting.

The format area consists of the following sections:

- Arbitrary text - This can be anything you want to appear in the column. It is not related to the data. This is useful for adding a leading $, a code like A or B, or a description like Units or Pay before or after the actual data.
- A percent (%) - This tells the advanced formatting that you will be outputting data from the report. Following the %, there are several optional characters that can be put in order to produce the advanced formatting you need:
  - Another % will show an actual "%" in the output
  - An optional padding character that will be used, if needed, to make the output the right length. Standard padding characters are a space (default if nothing is specified) or a 0. For other padding characters, use a single quote (') in front of the character, i.e. '#.
  - An optional alignment specifier that makes the output either left-justified or right-justified. The default is right justified. Put a - character to make it left justified.
  - An optional width specifier - For example "2" can be listed next. This will make the length of the output at least this long.
  - An optional precision specifier to indicate how many decimal places should be displayed for numbers, or the maximum characters for strings. For example, ".2" will add a decimal point and two digits.
  - A data type specifier - For example "f" for numbers with decimals, "d" for numbers without decimal, "s" for text strings or "D" for numbers with implied decimals
  - Note: In some fields, two pieces of data are available and can be accessed with %1s and %2s

Examples:

- To format 25.05 as a pay amount to be "$25.05", use an advanced formatting string such as "$%2.2f"
- To format 5.00 as a pay amount to be "Pay: $005.00", use an advanced formatting string such as "Pay: $%03.2f"
- To format 5.00 with # padding to be "##5.00", use an advanced formatting string such as "$%'#3.2f"
- To format 8.33 units to simply be "Units: 8", use an advanced formatting string such as "Units: %d"
- To format .751 as a work percentage "75%", use an advanced formatting string such as "%2f%%"
- To format .751 as a work percentage "75.1%", use an advanced formatting string such as "%2.1f%%"
- To format 8.5 hours with leading zeros, 4 positions for the number and 4 implied decimal points "00085000", use an advanced formatting string such as "%04.4D"

Special characters can be specified, if needed to put reports on multiple lines, or to include tabs:

- A tab character can be specified with a \t
- A new line character can be specified with a \n
- A return character can be specified with a \r

Note: Some formatting options require Version 1.6.35 or later

For additional help, search the Internet for examples and help in using the "sprintf" function.

Supported Functions for Advanced Expressions

To use expressions in Custom Payroll and Custom Report:

- Select "Expression" from the drop down
- Put the expression in the Default Column
- All expressions begin with an "=" (equals sign). For example =utcdate("Y") would show the current 4-digit year.
- To use a variable provided by the report, enclose the variable's name in square brackets (for example, [variable_name]). See the documentation for each report for a list of available variables.
- When a row is summarized (the "Total (sum)" or other summarize function is selected for at least one column in the report) it's possible to have an expression that evaluates for each row and a separate expression that evaluates on the summarized row. In the summarized row, access columns with [n] where n is the column number. This is useful, for example, when you need to compare summarized values, or when you want to show something only once, such as the total worked hours in a year. To separate the per-row and summarized-row expressions, use this format:
  =[row expression]
  --summarizeExpression--
  =[summarized row expression]
- Example: Total hours worked in the current calendar year, in column 3. Note that the summarized expression only sees the summarized rows, so it cannot directly access [usersID] needed by findWorkedTime. So, the first line puts the employee's ID in the column so it can be used as the first argument to findWorkedTime:
  =[usersID]
  --summarizeExpression--
  =round(findWorkedTime([3],strtoutctime(utcdate("Y-01-01")))/3600,2)

Function	Effect	Example Expression	Example Return
if(*condition*, *trueValue*, *falseValue*)	If the *condition* is true, returns *trueValue*, otherwise returns *falseValue*. *You may also use IIF() or iif() instead of if().*	if([x] > 0, "positive", "negative")	"negative" (*if x is -2*)
round(*number*[,*precision*])	Returns the number rounded to decimal points specified in *precision*. Negative precision rounds ahead of the decimal. *You may also use ROUND() instead of round().*	round(5.2345,2) round(123445,-2)	5.23 123400
floor(*number*)	Returns the largest whole number less than *number* (rounds down). *You may also use FLOOR() instead of floor().*	floor(2.3)	2
ceil(*number*)	Returns the smallest whole number greater than *number* (rounds up). *You may also use CEIL() instead of ceil().*	ceil(2.3)	3
empty(*variable*)	Returns true if the variable does not exist or is equal to zero, false, or an empty string, otherwise returns false. *You may also use ISBLANK() instead of empty().*	empty([x])	1 (*if x is -2*)
min(*x*, *y*)	Returns the smaller of *x* and *y*. *You may also use MIN() instead of min().*	min(2, 1)	1
max(*x*, *y*)	Returns the larger of *x* and *y*. *You may also use MAX() instead of max().*	max(2, 1)	2
time()	Returns the current UNIX timestamp	time()	1345582930
str_replace(*before*, *after*, *subject*)	Replaces all occurrences of *before* that appear in *subject* with *after*.	str_replace("a", "A", "bad")	"bAd"
substr(*subject*, *start*, *length*)	Returns *length* characters out of *subject* starting at *start*. Note that the first character is 0, not 1.	substr("abcd", 1, 2)	"bc"
stristr(*haystack*, *needle*)	Returns all of *haystack* from first occurrence of *needle* to the end. Case insensitive.	stristr("abcdefg", "cd")	"cdefg"
strstr(*haystack*, *needle*)	Returns all of *haystack* from first occurrence of *needle* to the end. Case sensitive.	strstr("abcdefg", "cd")	"cdefg"
stripos(*haystack*, *needle*, *search_start_position*)	Returns the numeric position of the first occurrence of *needle* in *haystack* starting at *search_start_position*. Case insensitive. Needle may be one or more characters. Search_start_position is optional.	stripos("abcd abcd", "bc", 4)	"6"
strpos(*haystack*, *needle*, *search_start_position*)	Returns the numeric position of the first occurrence of *needle* in *haystack* starting at *search_start_position*. Case sensitive. Needle may be one or more characters. Search_start_position is optional.	strpos("abcd abcd", "bc", 4)	"6"
strlen(*text*)	Returns the numeric length of *text*	strlen("abcd")	"4"
substr_count(*haystack*, *needle* [,*offset*] [,*length*])	Returns the number of occurences of *needle* in *haystack*. You can optionally specify the offset where to start counting. You can also optionally specify the maximum length after the specified offset to search for the substring.	substr_count("11:12:13", ":")	"2"
strtoupper(*string*)	Returns the upper case version of a string	strtoupper("aBcD")	"ABCD"
getfield(*text*,*start_marker*,*end_marker*)	Returns the section of *text* between *start_marker*,*end_marker*. Case insensitive.	getfield("$abcd~^efgh~","$","~")	"abcd"

splitfield(*text*,*delimiter*[,*after*])	Returns the section of *text* before or after the first occurence of *delimiter*. Optionally, set *after* to "1" to get the section after. Case insensitive.	splitfield("abcd~efgh","~",1)	"efgh"
in_list(*needle*,*[haystack 1],[haystack 2],[haystack n]*)	Returns true or false if the *needle* is found in the list of items passed in as *haystack*. Any number of items can be passed in after the *needle* to make up the *haystack*. If only the needle is passed in then the expression will return false.	in_list([payrollEventType],"Standardtime","Overtime")	False
utcdate(*format*[, *timestamp*][, *employee ID*])	Formats the timestamp based on the format string (compatible with PHP's date() function) in the employee's time zone, or the company's time zone if the employee ID is omitted. If the timestamp is omitted, the current time is used (useful when you just want the current year or month).	utcdate("m/d/Y", 1230832800)	"01/01/2009" (for US time zones)
strtoutctime(*datetime string*[, *employee ID*])	Returns a UTC timestamp for the provided time in the employee's time zone, or the company's time zone if the employee ID is omitted.	strtoutctime("2010-01-01 12:15:00 PM")	"1262366100"
adjustRangeDstUser(start timestamp,seconds[,employee ID])	Returns a UTC timestamp adjusted by the selected number of seconds for the specified employee. If the employee is not specified, the timezone of the division is used. If the adjustment spans a DST transition, the transition is added/subtracted automatically.	adjustRangeDstUser(1230832800,86400,[usersID])	"123919200"
scheduleDayTimestamp(*employeeID*, *timestamp*, *startOrEnd*)	Returns a UTC timestamp that represents either the beginning or end of the schedule day that contains the specified timestamp. The last parameter can be one of "start", "beg", "begin", or "begining" to get the start of the schedule day or one of "end" or "ending" to get the end of the schedule day.	scheduleDayTimestamp([usersID], [occurs], 'start')	1234567890
sprintf(*"format string"*[, *data*, *data*])	Formats the data into the format string (compatible with PHP's sprintf() function).	sprintf("%s %s",[nameFirst],[nameLast])	"Bob Smith"
custom(*custom key name*, *custom value name*, *custom key*, *division id*)	Returns the "custom value" matching the "custom key" for the custom field named "custom key name" of the type "custom value name". Optional *divisionID* can be provided to select data for the employee's division (use 0 for all divisions). In the example, a custom data table connects zip codes to territories. The function finds the territory of an employee, based on their zip code.	custom("Zip Code","Territory",[zip],[divisionID])	"Southern"
findLastClock(*usersID*,*startTimeStamp*, *endTimeStamp*,*clockType*)	Returns the timestamp of the last *clockType* (either "in" or "out") for the employee with *usersID* that occurs between *startTimeStamp* and *endTimeStamp* inclusive. In the example, the timestamp of the last clock out up to an hour prior to the current clock in will be returned for the employee on the row.	findLastClock([usersID],[adjTimeIn]-3600,[adjTimeIn],"out")	"1265222010"
findIn(*position* ,*startTimeStamp*, *endTimeStamp*,[*usersID*])	Returns the timestamp of a clock In during the time range. The timestamp returned is determined by the value of position. If position is 1 then we return the first In. A position of 2 would return the second In. Negative values for position are also supported. To find the last clock In during the range use a position of -1. A position of -2 would give the second to last clock In and so on. usersID is an optional parameter that limits the scope of the search to just one user. *If there are no events in the range for the user the expression returns -1.*	findIn(1,1230832800,123919200,[usersID])	"123913600"
findOut(*count*,*startTimeStamp*, *endTimeStamp* ,[*usersID*])	Returns the timestamp of a clock Out during the time range. The timestamp returned is determined by the value of position. If position is 1 then we return the first Out. A position of 2 would return the second Out. Negative values for position are also supported. To find the last clock Out during the range use a position of -1. A position of -2 would give the second to last clock Out and so on. usersID is an optional parameter that limits the scope of the search to just one user. *If there are no events in the range for the user the expression returns -1.*	findOut(-1,1230832800,123919200,[usersID])	"123917200"
findMaxBreak(*usersID*,*startTimeStamp*, *endTimeStamp*)	Returns the duration in seconds of the largest range of non-worked time between two timestamps.	findMaxBreak([usersID],[adjTimeIn],[adjTimeIn]+18000)	"1800"
schedule(*usersID*,*dayOfTimeStamp*, *schedulePoint*[, *format*])	Returns the *format* time (or timestamp if not specified) of the schedule point specified by *schedulePoint* (either "firstin" "firstout" "secondin" or "secondout") for the employee with *usersID* that occurs on the calendar day that includes the timestamp *dayOfTimeStamp* in the employee's time zone. In the example, the timestamp of the first scheduled clockin time will be returned for the employee on the row. If no schedule is present, "No Schedule" will be returned instead.	schedule([usersID],[adjTimeIn],"firstin","Y-m-d g:i:s a")	"2010-04-20 8:00:00 am"
getUncoveredScheduleTime(*employeeID*, *timestamp*, [*honorGracePeriods*])	Look at an employees worked time and schedule for the day including *timestamp* and return the duration, in seconds, of the uncovered portions of their schedule. Uncovered time is time that was scheduled to work but was not. The third parameter *honorGracePeriods* can be with a 1 or 0 (the default). When enabled the system will not require employees to be on the clock during the allowable minutes before/after their schedule points.	getUncoveredScheduleTime([usersID], [occurs], 1)	10845
getBenefitsUsed(*employeeID*, *begTimestamp*, *endTimestamp*)	Returns the duration in seconds of all benefit usages for the specified employee between the two timestamps provided. Includes all benfit types.	getBenefitsUsed([usersID], [begTimestamp], [endTimestamp])	7200
getBenefitTypesUsed(*employeeID*, *begTimestamp*, *endTimestamp*)	Returns an array of all distinct benefit types used by the employee between the two timestamps provided.	implode(",", getBenefitTypesUsed([usersID], [begTimestamp], [endTimestamp]))	Sick, Vacation
calendarDayMatch(*begin*,*day*, *occurs*[,*daybreak*][,*usersID*])	Starting at "begin" (timestamp), consider a calendar day that is "day" (integer) days from then in the context of employee with "usersID." Returns true if the event at time "occurs" falls on on the day when considering "daybreak" (HHMM) to be the start/stop of a day. If daybreak is not specified, it is considered "0000" or midnight. If usersID is not specified, timezone is consitered to be the company's time zone. Example: If a report contains a column for each day, and time needs to be put into columns based on schedules that start at 9AM each day, call as shown in the example to identify time on the 3nd day into the report (2 days past the first).	calendarDayMatch([begTimestamp],2, [occurs],"0900",[usersID])	True
findWorkedTime(*usersID*[,*startTimeStamp*][, *endTimeStamp*])	Returns the number of seconds of worked time between the *startTimeStamp* and *endTimeStamp*. If set to 0 or left blank, startTimeStamp and endTimeStamp are considered unbounded.	findWorkedTime([usersID],0,0)	"86400"
findWorkweekInfo(*usersID, timestamp, information*)	Return the desired information for the workweek the employee is a member of at the specified timestamp. Valid parameters for information are employeeBeginTime, employeeEndTime, workweekGroupName, and workweekGroupID.	findWorkweekInfo([usersID], time(), 'workweekGroupName')	"Direct"
trackingField(*field*[,*column*][, *forClockIn*])	Returns the desired information for the tracking field specified by *field*. *field* can be either the database ID number of the tracking field or can be the name such as "Mileage" if I have a tracking field called mileage. If the field is of the "Select From List" type then you provide one of the following: "val" "code" "paycode" to get either the value, code, or pay code associated with the event. The default is "val." Finally you can specify true or false for *forClockIn* to gather the tracking field value from either the clock in or clock out of a worked time event. Defaults to true.	trackingField("Position", "code", true)	"ACCTNG"
pieceworkField(*field*)	Returns the desired information for the piecework field specified by *field*. *field* is the name such as "Mileage"	pieceworkField("Mileage")	"24354"
. (dot)	Joins two results or strings together.	"First: ".[nameFirst]	"First: Bob"
updateEmployeeCustomField(*field, value, [output]*)	This function will update the appropriate custom employee field with the given value. In addition, this function will return *output*, or if *output* has not specified, it will return *value*.	updateEmployeeCustomField("testing", "17", "16")	"16" *(And the custom field testing is set to 17)*

getJobIDByName(*name*)	Returns the unique database jobID for the named job in the context of the current employee.	getJobIDByName("Lunch")	1
getUserSalaryRateAtTime(*userID*, *timestamp*)	Returns a decimal rate for Salary employee's for the time of the timestamp. This is compared to [yearly_rate] but can be called when no time is associated with the employee.	getUserSalaryRateAtTime([usersID], [begTimestamp])	22760.54
getUserSalaryTypeAtTime(*userID*, *timestamp*)	Returns the employees Pay Type (Salary, Hourly) if they have one set during the entered timestamp. If no pay type is setup the function will return a blank string "". This function can be called with no time associated with the employee.	getUserSalaryTypeAtTime([usersID], [begTimestamp])	"Hourly"
wo_segments()	If used in the context of Custom Payroll or Custom Reporting on an event that has a Work Order Job this function will return an array of the names of all Work Order Segments that contain that Work Order Job.	implode(", ", wo_segments())	"Manufacturing, Shop"

wo_segment_info(*formatString*, *timestamp*[, *segmentName*])	If used in the context of Custom Payroll or Custom Reporting on an event that has a Work Order Job this function will return a string of data about a Work Order Segment if appropriate.
	If a value is provided for *segmentName* then the function will attempt to find a Segment for the Work Order Job by that name. If *segmentName* is blank then the first Segment alphabetically is used.
	The argument *timestamp* is required to define the scope of the lookup used to calculate the segment's worked hours or percentage of budget worked.
	The argument *formatString* defines both the data that is being requested and the format of the function's response. It should be a string with one or more tags wrapped in curly braces { and } such as `"Segment: {name}"`.
	The list of supported tags and their meanings is:
	`{name}`
	The name of the Work Order Segment.
	The budgeted hours for the segment, expressed in seconds. Will be "N/A" if there is no budget.
	`{budgeted-hours-HMS}`
	The budgeted hours for the segment, expressed in HH:MM:SS format. Will be "N/A" if there is no budget.
	`{budgeted-hours-HH.HH}`
	The budgeted hours for the segment, expressed in H.HH format. Will be "N/A" if there is no budget.
	`{hours-worked-seconds}`
	The number of hours worked in the segment, expressed in seconds.
	`{hours-worked-HMS}`
	The number of hours worked in the segment, expressed in HH:MM:SS format.
	`{hours-worked-HH.HH}`
	The number of hours worked in the segment, expressed in H.HH format.
	`{percentage}`
	The perctange of the budget worked. Will be "N/A" if there is no budget.
	`{deny-clocking}`
	The current state of the segment's option to deny clocking. Will be either "Accept" or "Deny". (Note that this is as of the current time, not the time passed in through *timestamp*.)
		wo_segment_info("Segment {name}: {hours-worked-HH.HH} / {budgeted-hours-HH.HH} ({percentage}%)", [occurs])	"Segment Manufacturing: 7.00 / 10.00 (70.00%)"

Internal Information (visible to Administrators only):

explode and xprintf are also supported, but have fairly complicated documentation.

See Also:
Expression Variables for Custom Report / Custom Payroll Export
Custom Fields and Data
Supported Functions for Advanced Expressions

Expression Variables for Custom Report / Custom Payroll Export

Variables available for expressions in "Columns" tab

Variable	Description
usersID	Employee's internal ID number (use with utcdate function to format time into the Employee's time zone)
nameFirst	Employee's first name
nameMid	Employee's middle name
nameLast	Employee's last name
HID	Employee's badge number
empNum	Employee's Alternate number
mgrNameFirst	Employee's manger's first name
mgrNameMid	Employee's manager's middle name
mgrNameLast	Employee's manager's last name
isActive	Is the employee active as of the time the report was ran? 1 = active, 0 = Inactive, eligible for rehire, -1 = Inactive, not eligible for rehire
addr1	Employee's Address line 1
addr2	Employee's Address line 2
city	Employee's city
state	Employee's state
zip	Employee's zip code
phoneExt	Employee's phone extension
homePhone	Employee's home phone
cellPhone	Employee's cell phone
startDate	Employee's hire date
birthDay	Employee's birthday
username	Employee's login username
title	Employee's title
SSN	Employee's SSN or Gov ID
status	0=inactive, 1=active
gender	Employee's gender: M/F/null

email1	Employee's first email address
email2	Employee's second email address
email3	Employee's third email address
userDefaultDepartmentName	Employee's default department
userDefaultDepartmentCode	Employee's default department's code
e1Name	Employee's emergency 1 Name
e1Addr1	Employee's emergency 1 Address 1
e1Addr2	Employee's emergency 1 Address 2
e1City	Employee's emergency 1 City
e1State	Employee's emergency 1 State
e1Zip	Employee's emergency 1 Zip
e1Phone	Employee's emergency 1 Phone
e1Public	Employee's emergency 1 Public viewable flag
e2Name	Employee's emergency 2 Name
e2Addr1	Employee's emergency 2 Address 1
e2Addr2	Employee's emergency 2 Address 2
e2City	Employee's emergency 2 City
e2State	Employee's emergency 2 State
e2Zip	Employee's emergency 2 Zip
e2Phone	Employee's emergency 2 Phone
e2Public	Employee's emergency 2 Public viewable flag
flagIn	Error on in, i.e. double punch
flagOut	Error on out
clockNote	Clock in note
clockNoteOut	Clock out note
clock_in_out_note	Clock in and clock out note together
clientIn	Name of clock where clock-in took place
clientOut	Name of clock where clock-out took place
remoteIpIn	IP address of computer used to clock-in (remote clock only)
remoteIpOut	IP address of computer used to clock-out (remote clock only)
cidInNumber	Caller ID of phone used to clock-in (telephone clock only)
cidOutNumber	Caller ID of phone used to clock-out (telephone clock only)
cidInName	Caller ID name of phone used to clock-in (telephone clock only)
cidOutName	Caller ID name of phone used to clock-out (telephone clock only)
payableOnHoliday	"Yes" if time occurs within a holiday, otherwise null
siteLocationIn	Clock location, including site name
locationIn	Clock location, without site name
siteLocationOut	Clock location of clock-out
locationOut	Clock location of clock-out, without site name
payrollEventType	Type of pay, i.e. Standardtime, Overtime, Sick, Paid Time Off, etc.
payrollEventType_code_name	Type of pay codename, i.e. standardtime, sick, paidtimeoff, etc.
job_shortname	Job short name
job_longname	Job long name
job_description	Job description
job_ctrlNum	Job control number
job_glNum	Job GL number
job_code	Job code
job_subCode	Job subcode
job_altNum	Job alternate number
job_rate	Job billing rate
job_overrideHourlyRate	Job override Hourly Rate
job_overrideMultiplier	Job override Multiplier
job_overrideDifferential	Job override Differential
job_category	Job category
customer_name	Customer name of job (not work order)
defaultJob_shortname	Employee's default job short name
defaultJob_longname	Employee's default job long name
defaultJob_description	Employee's default job description
defaultJob_ctrlNum	Employee's default job control number
defaultJob_glNum	Employee's default job GL number
defaultJob_code	Employee's default job code
defaultJob_subCode	Employee's default job subcode
defaultJob_altNum	Employee's default job alternate number
defaultJob_rate	Employee's default job billing rate
defaultJjob_category	Employee's default job category
defaultJ_customer_name	Customer name of employee's default job (not work order)
workorder_name	Workorder name
workorder_code	Workorder code
workorder_poNum	Workorder po number
workorder_dateStart	Workorder start date
workorder_dateDue	Workorder due date
workorder_detail	Workorder detail
workorder_completion	Workorder completion
workorder_customer	Workorder customer

workorder_sequence	Workorder Sequence Order
adjTimeIn	Paid time start (timestamp) - includes all edits, rounding, snapping, etc.
adjTimeOut	Paid time end (timestamp) - includes all edits, rounding, snapping, etc.
timeIn	Time in creation time (timestamp) - time the clock-in was actuall created
timeOut	Time out creation time (timestamp) - time the clock-out was actually created
realTimeIn	Real time in (timestamp) - clock in time without edits, rounding or snapping
realTimeOut	Real time out (timestamp) - clock out time without edits, rounding or snapping
realOrPaidTimeIn	Will provide realTimeIn if it is not null. Otherwise it will provide the "occurs" variable
realOrPaidTimeOut	Will provide realTimeOut if it is not null. Otherwise it will provide "occurs + duration"
realDuration	Number of seconds between realTimeIn and realTimeOut if neither are null
realOrPaidDuration	Number of seconds between realOrPaidTimeIn and realOrPaidTimeOut
occurs	Payable time start (timestamp) - includes splits for day, type of pay change, etc.
endoccurs	Payable time end (timestamp) - includes splits for day, type of pay change, etc.
openEvent	Status of the time event: Open time event (no clock out) is 1. A closed event (clock in and out) is 0.
empType	Payroll type
paid_hourly_rate	Regular rate as calculated for event
ww_start	Workweek start timestamp
ww_end	Workweek end timestamp
ww_groupID	The unique database ID of the employee's workweek group at the time of the event
ww_groupName	The name of the employee's workweek group at the time of the event
paid	0 for unpaid benefit types, otherwise 1
payroll_occurred	Date marked as "payrolled"
code_name	Same as payrollEventType_code_name
isHourly	"Yes" if employee has an hourly rate, otherwise "No"
flsa_exempt	"Yes" or "No"
duration	Length of payroll event in seconds
sumDuration	All worked time in seconds
benefitRequestNote	Note attached to a benefit request
benefitRequestDate	Date of the creation for a benefit request
benefitName	Benifit type name ie "Sick", "Vacation", etc
benefitSubclassName	Benifit Subclass name
benefitSubclassCode	Benifit Subclass code
benefitSubclassGlnum	Benifit Subclass GL number
benefitSubclassDescription	Benifit Subclass Description
benefitEventCreationDate	Time a benefit event was either created or approved
endTimestamp	payroll report range end timestamp
begTimestamp	payroll report range beginning timestamp
reg_hourly_rate	Payable Hourly Rate (base, no modifiers) - Employee's Base Hourly Rate without any kind of differentials, overrides, overtime, etc. applied.
yearly_rate	Payable Salary Rate (base, no modifiers) - Employee's Base Salary Rate without any kind of differentials, overrides, overtime, etc. applied. *Requires a time event in the system for the user.
payRate	Payable Hourly Rate (diff/override) - Employee's Base Hourly Rate, plus any differentials or overrides, but no OT/DT/PT.
pay_per_hour	Payable Hourly Rate (diff/override and OT/DT/PT) - Employee's Base Hourly Rate plus any differentials or overrides, multiplied by OT/DT/PT multipliers, if applicable. For FLSA compliance, when in OT/DT/PT, this amount is at least the Payable FLSA Weekly Base Hourly Rate times the OT/DT/PT multiplier.
base_rate	Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week.
net_pay	Total net dollar amount pay for event
hourly_rate	Override rate (can be null)
hourly_differential	Override differential (can be null)
rate_multiplier	Override rate multiplier (can be null)
payroll_event_type_name	Override pay type name, i.e. Overtime, Sick, etc. (can be null)
counts_toward_overtime	Override counts-toward-overtime (can be null)
event_note	Payroll engine notes on splits, benefits and misc (can be null)
event_note_pay	Payroll engine notes on pay and overtime (can be null)
holiday_name	Holiday Name, only set for actual holiday hours (can be null)
holiday_day_name	Holiday Name, set for holiday hours and any work on holiday (can be null)
payCode	Pay code from pay codes table
presetName	Name of the report preset
shift_name	The name of the shift worked

shift_payCode	The pay code of the shift worked
shift_shiftCode	The code of the shift worked
shift_status	The status of the shift worked
shift_note	The note of the shift worked
shift_description	The description of the shift worked
shiftDifferential_name	The name of the shift differential, it it applies
shiftDifferential_code	The code of the shift differential, if it applies
division_code	The payroll code set for the division
BurdenedRate	The burdened rate for the empolyee (requires IPSBRD module)
AllocationCode <your code name> code	The Code of the specified allocation code
AllocationCode <your code name> amount	The Amount of the specified allocation code
AllocationCode <your code name> note	The Note of the specified allocation code
piecework_name	Piecework name
piecework_poNum	Piecework PO number
piecework_subCode	PieceworkPiecework
piecework_glNum	Piecework GL nuber
piecework_description	Piecework description
piecework_code	Piecework code
piecework_altNum	Piecework alternate number
piecework_note	Piecework note
piecework_quantity	Piecework quantity completed
piecework_includeInEffectiveWage	Piecework option to include in FLSA calculations
piecework_payTimePerUnit	Piecework pay in untis of time per unit completed
piecework_payRateMultiplierPerUnit	Piecework pay multiplier per unit completed
piecework_payPerUnit	Piecework pay per untic completed
piecework_field-<your field name>	The value of the piecework field for the event. <your field name> is all lower case with spaces removed.
deptCode	Department code on the time event.
departmentName	Department name on the time event.
custom_<your fierd name>	The value of the custom employee field. <your field name> is all lower case with spaces removed, mating your custom field name.

Variables available for expressions in the "Preamble" and "Footer" tabs:

Variable	Description
rowcount	Rows in the report
comment	Report Comment
reportStart	Timestamp of report start
reportEnd	Timestamp of report end
totalPay	(grand total pay for the report)
total-#	(i.e. total-1 for total of column 1)

See Also:
Custom Fields and Data
Expression Variables for Custom Report / Custom Payroll Export
Supported Functions for Advanced Expressions
Expression Variables for Custom Report / Custom Payroll Export

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Custom Fields and Custom Data

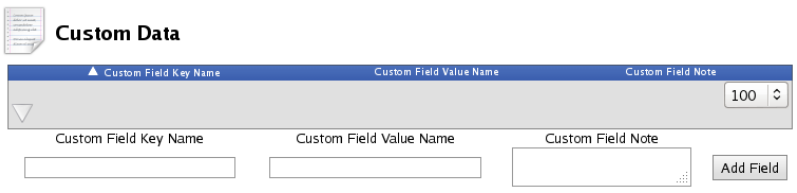
TimeIPS Custom data fields allow storing and using additional data to enhance custom payroll and custom reports. Data can be entered directly or imported/exported.

The IPSCDF Custom Data Fields module is required.

Using the left pane Main Menu » Administration, click on: System » Custom Data

Custom Data Field Entry

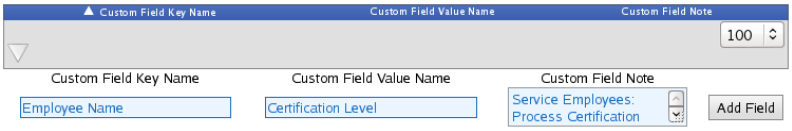
Custom fields are configured with a "key name" and "value name". Then, you can import or enter data for the actual keys and values you need. The key identifies who/what the data belongs to, while the value is the data itself.



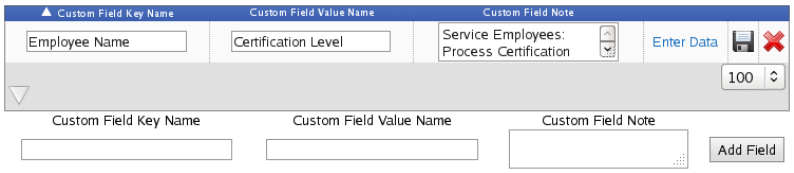
Create Custom Data Fields

For example, to create a custom field to track the certification levels of employees:

- Create a **Custom Key Name** such as "Employee Name" with a **Custom Value Name** such as "Certification Level" and optionally, set the **Note** to something descriptive, such as "Service Employees: Process Certification Level."



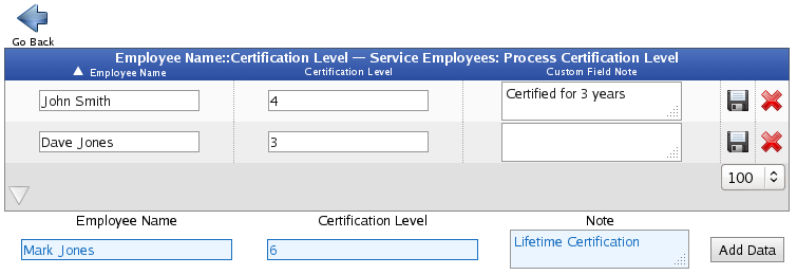
- Click the **Add Field** button to save the entry.



To **edit** an exising field, update the text and then click the floppy disk icon to **save**.

Click the red **X** icon to **delete** a field.

- Click **Enter Data** to add specific individual data for this set of custom fields. This will bring you to a similar looking page.



- From here, enter individual **Employee Names** and **Certification Levels**.
- Click the **Add Data** button to save the entry.

To **edit** an exising custom data entry, update the text and then click the floppy disk icon to **save**.

Click the red **X** icon to **delete** a custom data entry.

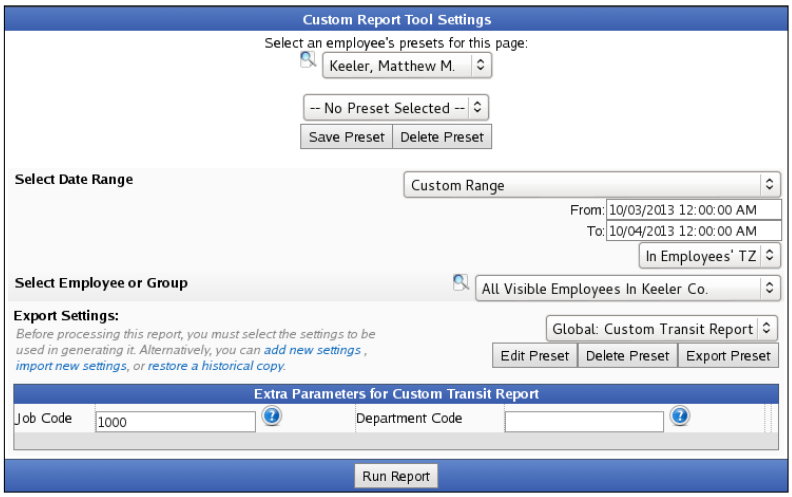
To **Go Back** to the Custom Fields page, click the blue arrow icon Go Back at the top of the page.

Attach Custom Data to Custom Reports

In Custom Reporting, use expressions to retrieve the certification level for an employee by specifying the field key name (Employee Name) and field value name (Certification Level) along with a specific "key" (an employee's name).

Using the left pane Main Menu » Administration, click on: Reports » Custom Report

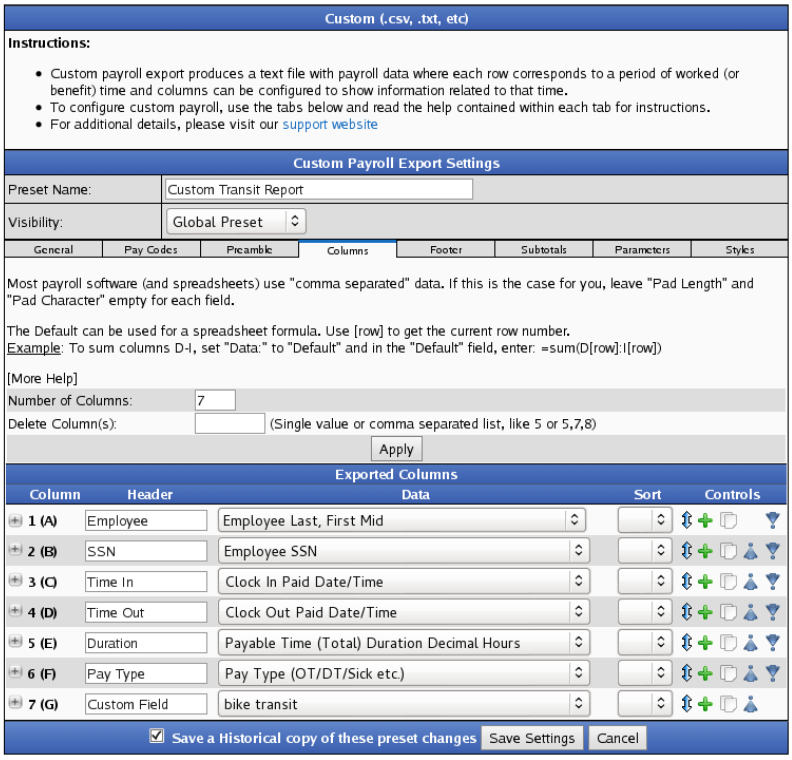
Custom Report



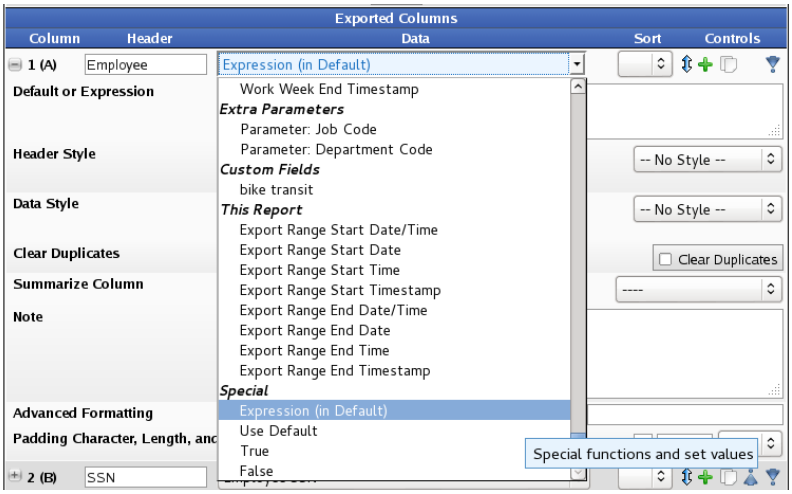
- If you already have a preset, find it in the **Export Settings** drop down menu, then click the **Edit Preset** button.

For more detailed instructions on creating custom reporting presets, see the Custom Reporting/Payroll Export Settings article.

Custom Report



- Go to the **Columns** Tab.
- Under the **Exported Columns** section, click the **+** (plus) sign to the left of the appropriate cell/column. (In this example, we are looking at **1 (A)**.)



- From the **Data** drop down menu, select **Expression (In Default)**.
- Enter the expression into the **Default or Expression** box.
- Click the **Save Settings** button to save the changes.

To see a list of compatible expressions, see the Expression Variables for Custom Report / Custom Payroll Export article and the Supported Functions for Advanced Expressions articles.

Internal Information (visible to Administrators only):

Add information about Import/Export

See Also:
Supported Functions for Advanced Expressions
Expression Variables for Custom Report / Custom Payroll Export

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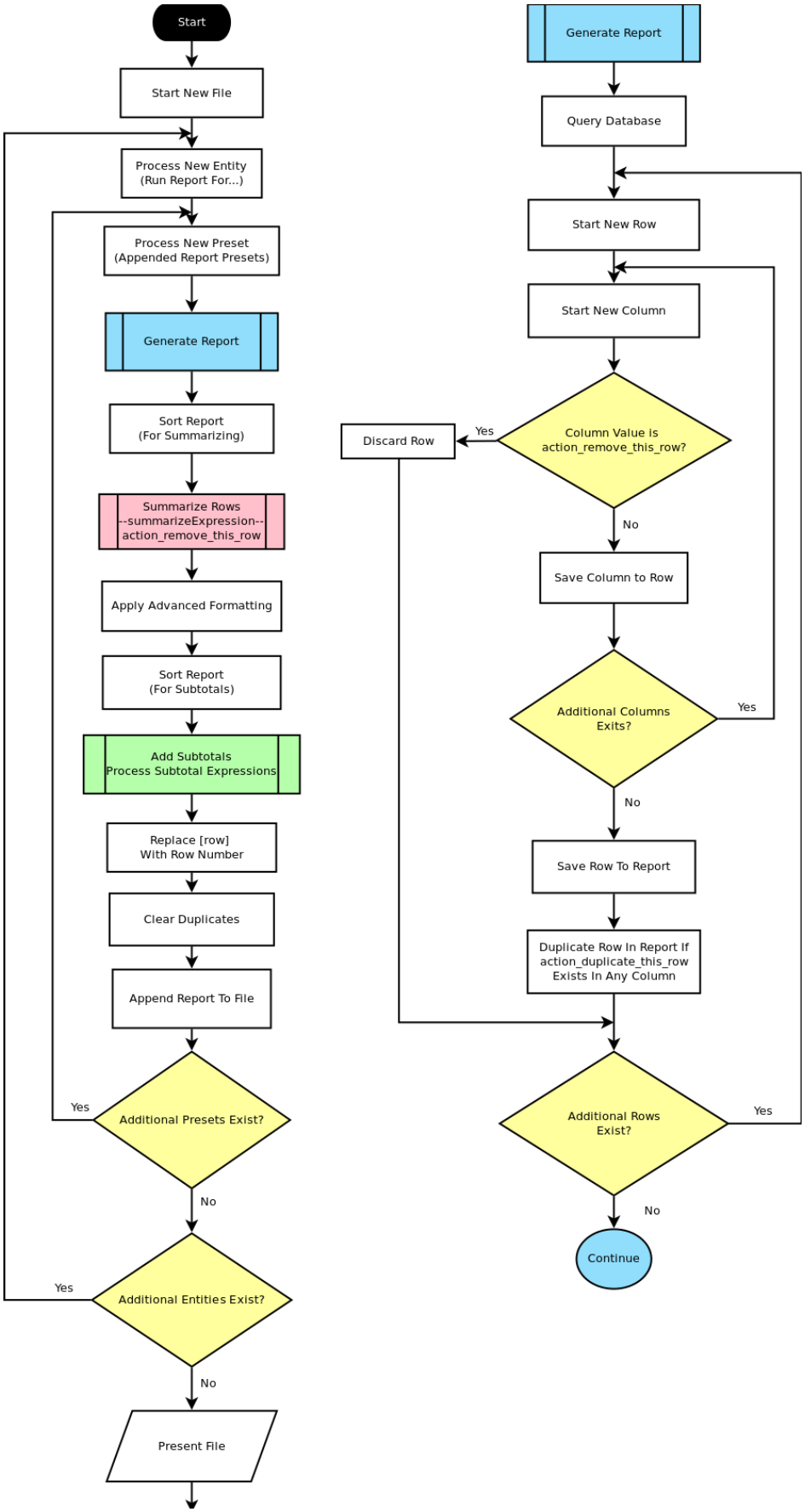
Volt e-Time Preset

The Volt Payroll Export generates a file that can be imported into the Volt Payroll application which includes payroll events for the selected payroll period.

- Make sure that the Volt Employee Identification Number is entered as the "Alt. Employee ID" in the Employee's record.
- There are no required payroll export settings for Volt.
- Volt e-Time exports can also be created with the custom payroll export, and in that case can handle special logic and exceptions. If you need a customized Volt e-Time export, please contact TimeIPS Technical Support.

Custom Reporting: Control Flow

The TimeIPS Custom Reporting engine provides a powerful option for generating custom text files for reporting and payroll purpose. This article presents a flowchart which outlines the programming control flow of custom reporting.


Start
Start New File
Process New Entity
(Run Report For...)
Process New Preset
(Appended Report Presets)
Generate Report
Sort Report
(For Summarizing)
Summarize Rows
--summarizeExpression--
action_remove_this_row
Apply Advanced Formatting
Sort Report
(For Subtotals)
Add Subtotals
Process Subtotal Expressions
Replace [row]
With Row Number
Clear Duplicates
Append Report To File
Additional Presets Exist?
Yes
No
Additional Entities Exist?
Yes
No
Present File
Generate Report
Query Database
Start New Row
Start New Column
Column Value is
action_remove_this_row?
Yes
Discard Row
No
Save Column to Row
Additional Columns
Exits?
Yes
No
Save Row To Report
Duplicate Row In Report If
action_duplicate_this_row
Exists In Any Column
Additional Rows
Exist?
Yes
No
Continue

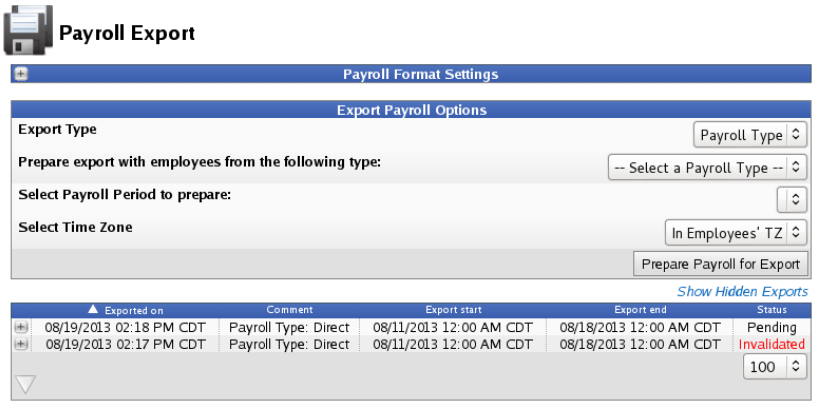
Internal Information (visible to Administrators only):

The original version of the diagram is in the TimeIPS-server repo under /docs/

Fortune 1000 Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, TimeIPS can generate a file containing your payroll data that is formatted for import into the Fortune 1000 payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Before you export:

- An Alternate Number must be assigned to each employee.
- A 2-digit numeric Department Code is required.

Prepare Payroll for Export

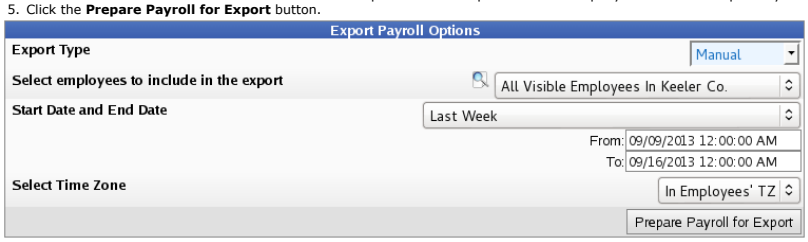
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

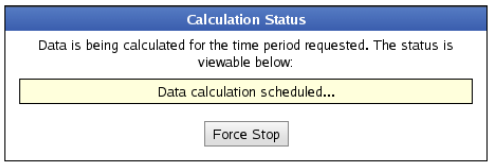
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

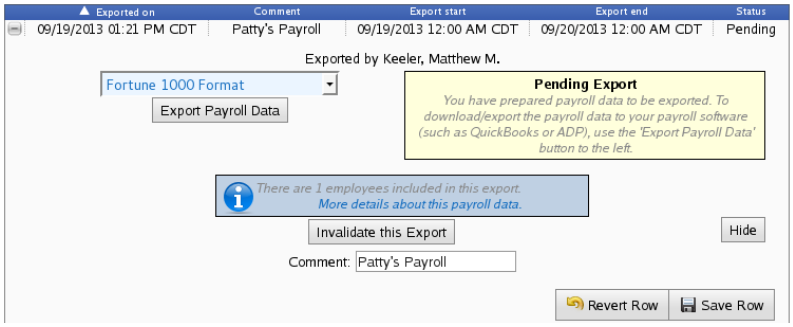


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Fortune 1000 Format** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

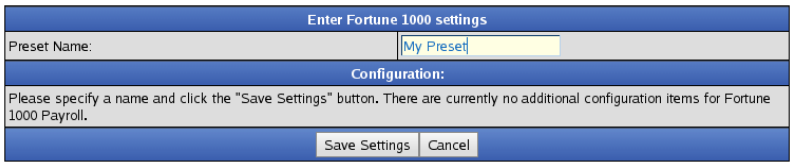
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Fortune 1000** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

The preset window will appear.

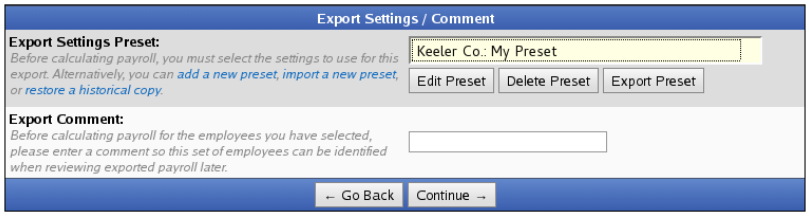


The following export settings should be defined prior to running your Fortune 1000 export:

- **Preset Name:** Enter the name you wish to assign to the preset.

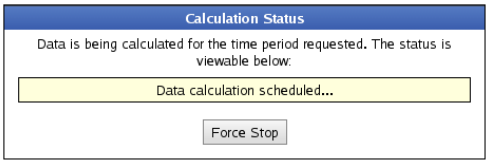
NOTE: There are currently no additional configuration items for Fortune 1000 Payroll.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

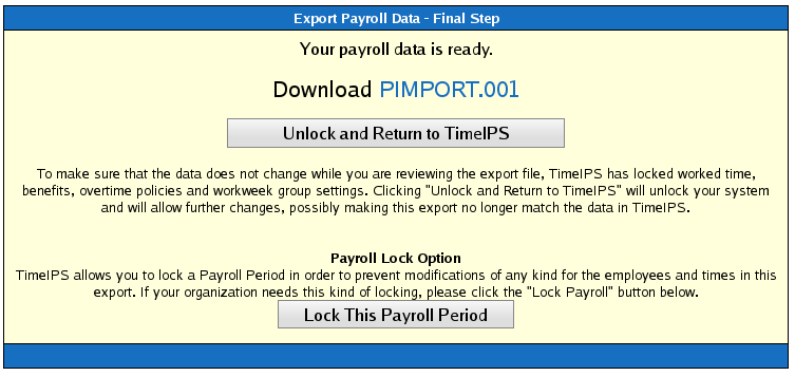


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

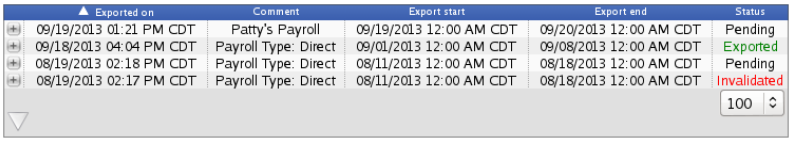


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

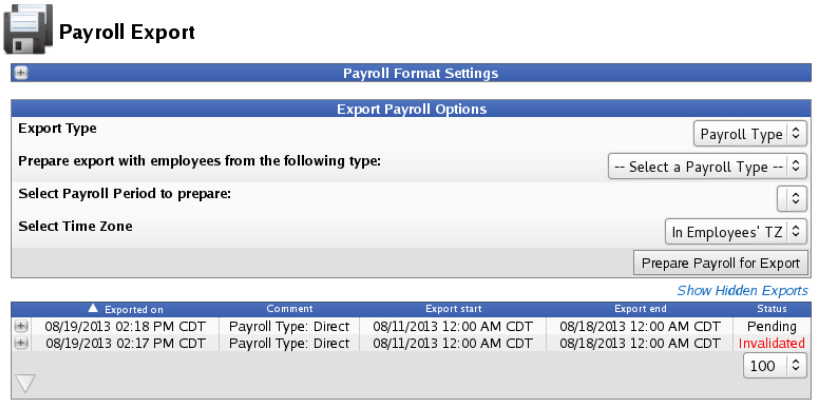
100

See Also:
Payroll Export (TimeIPS Version 1.6)
Fortune 1000 Export Settings

Manual Payroll Export

TimeIPS Payroll Export can generate a file with your payroll data. Many of these files can be opened in a spreadsheet application, such as Microsoft Excel or OpenOffice Calc, or, if using the Payroll Integration with Benefits Tracking optional module, the file can be imported in your payroll application, such as ADP, Paychex, or QuickBooks.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

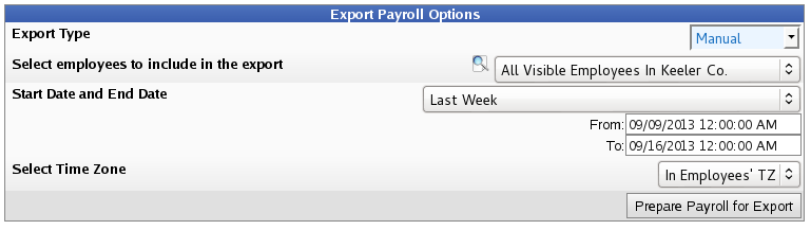
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

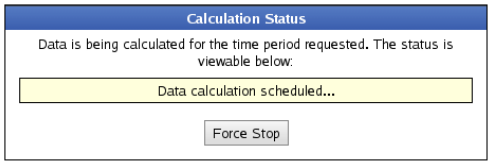
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

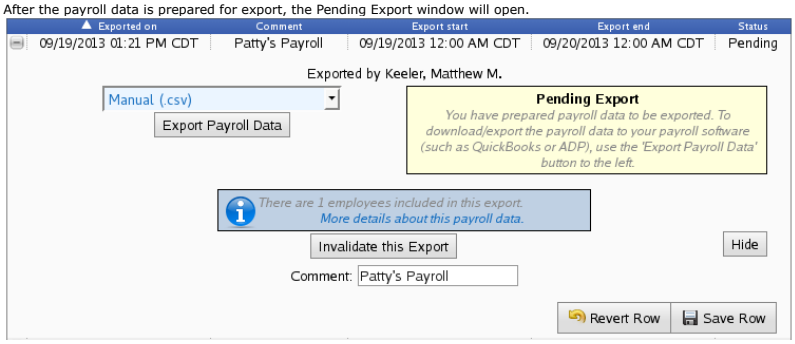


Next you should see the payroll calculation being scheduled.



Export Manual Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Manual (.csv)** from the drop down menu. The Manual payroll export offers a basic comma separated values file that can be opened in a spreadsheet program such as Open Office Calc or Microsoft Excel.
2. Next click on the button labeled **Export Payroll Data.**

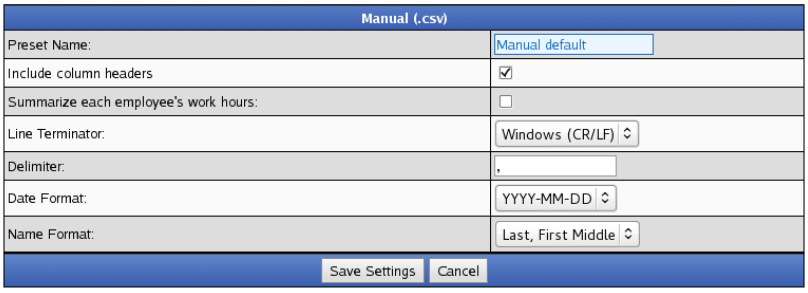
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Manual** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

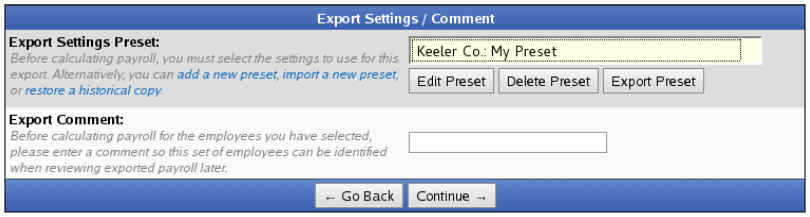
The preset window will appear.



The following export settings should be defined prior to running your Manual export:

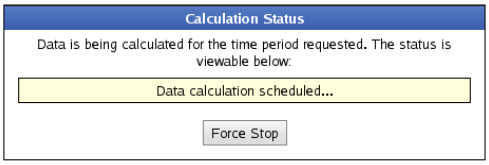
- **Preset Name:** Enter the name you wish to assign to the preset.
- If you would like to **Include column headers**, check the box.
- If you would like to **Summarize each employee's work hours**, check the box.
- **Line Terminator**
- **Delimiter:** A comma is the default setting. Enter "tab" to use a tab delimiter.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

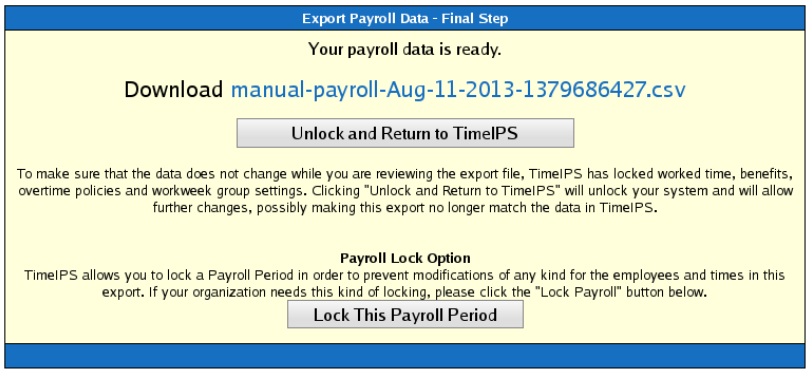


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

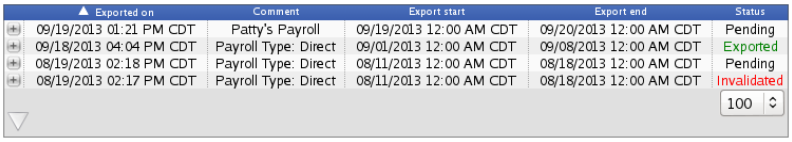


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

Internal Information (visible to Administrators only):

	v1.4	v1.5 and up		
	IPSQBI	IPSQBI	IPSCPI	IPSEPI
Payroll Exports	**No Dependencies**	**No Dependencies**	**Requires IPSQBI & IPSIPS**	**Requires IPSQBI & IPSIPS**
*ACCPAC**	*X*			
*ACCPAC Header**	*X*			
ADP PC/Payroll 5.1	X	X	X	X
Custom: Audit Detail			New	X
Ceridian Insync	X			New
Custom Export			New	X

Creative Solutions Payroll CS	X	X	X	X
Fortune 1000	X	X	X	X
Great Plains (Custom Preset)				New
Hours Worked Detail (Custom Preset)			New	X
Hours Worked Summary (Custom Preset)			New	X
Job Detail (Custom Preset)			New	X
Manual (.csv)	X	X	X	X
MAS90/200 Format 2 (Custom Preset)				New
Paychex 5	X	X	X	X
Paychex Paylink 9	X	X	X	X
Paychex Preview 6.4 (RapidPay)	X	X	X	X
PayChoice (Custom Preset)				New
Paywork	X	X	X	X
PeachTree Complete Accounting				New
PeopleSoft 8	X	X	X	X
*Preview-Review (HTML)***	*X*			
QuickBooks Integration	X	X	X	X
Time+Plus Format (Custom Preset)				New
Vadim (Custom Preset)				New
*Volt**	X			

** Not supported after v1.4*
*** HTML version, not an export; only available pre-1-5*

Payroll Integration with Benefits Tracking Module (IPSQBI) provides:

- Quickbooks
- ADP
- Paychex 5
- Paychex 6.4 (RapidPay)
- Paychex 9 (Paylink)
- Fortune1000
- Paywork
- PeopleSoft
- PayrollCS
- Paywork

Enhanced Payroll Integration (IPSEPI) provides:

- Peachtree (export)
- Ceridian Insync (export)
- Time+Plus (preset)
- Great Plains (preset)
- PayChoice (preset)
- MAS90/MAS200* (preset)
- Vadim (preset)

* Best "Extended Solution PR-1031" Module required.
(Purchase separately from Best Software)
Requires 1.5.7 or greater

Customizable Payroll Export (IPSEPC) provides:

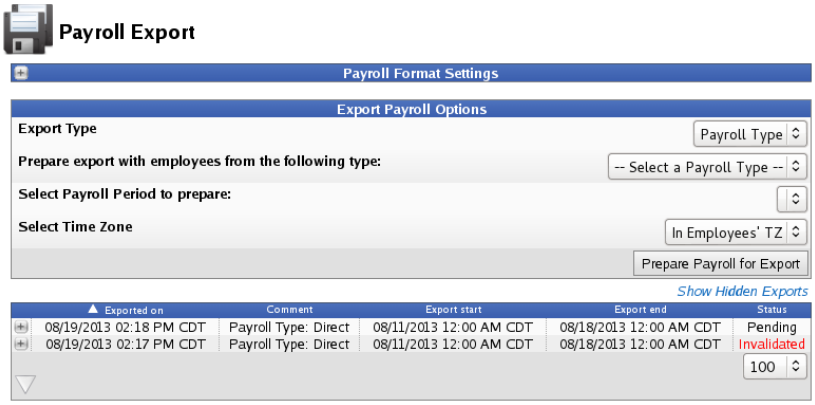
- Does not come with payroll-specific presets

Requires 1.5.7 or greater-->

Paychex 5 Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, the file can be imported into your Paychex 5 payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

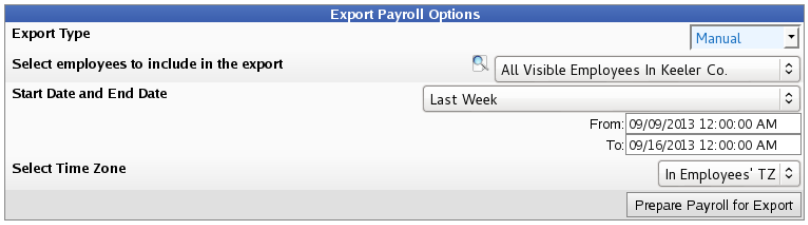
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

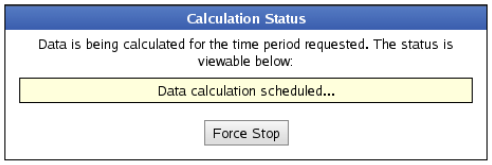
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

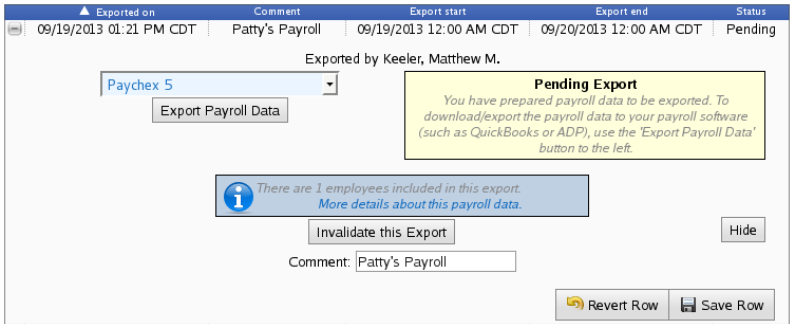


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Paychex 5** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Paychex 5** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

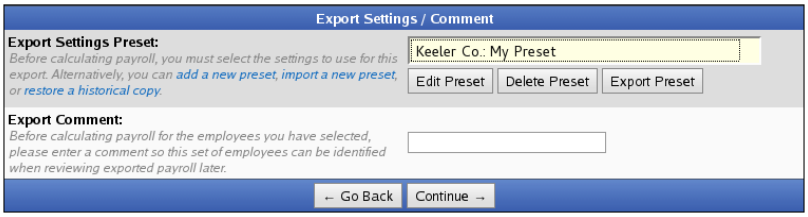
The preset window will appear.

Enter Paychex 5 Import File settings	
Preset Name:	My Preset
Office Number(0-1295):	0001
Client ID:	0001
Site Number (0-9):	1
Sequence Number (0-46655):	1
Wage Code Configuration:	
Wage Code for Standardtime:	R1
Wage Code for Overtime:	R2
Wage Code for Doubletime:	DT
Wage Code for Premium Time:	Pre
Wage Code for Holiday:	HO
Wage Code for Piecework:	Pie
Wage Code for Sick:	SI
Wage Code for Vacation:	VA
Save Settings / Cancel	

The following export settings should be defined prior to running your Paychex export:

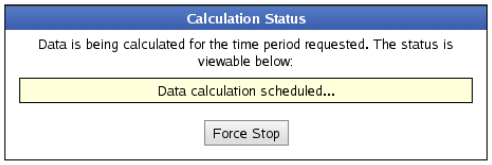
- **Preset Name:** Enter the name you wish to assign to the preset.
- **Office Number**: Enter an office number that falls in the range of 0-9999.
- **Client ID**: Enter a client ID that falls in the range of 0-9999.
- **Site Number**: Enter a site number that falls in the range of 0-9.
- **Sequence Number**: Enter a sequence number that falls in the range of 0-99999.
- Modify the **Wage Codes** if needed.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

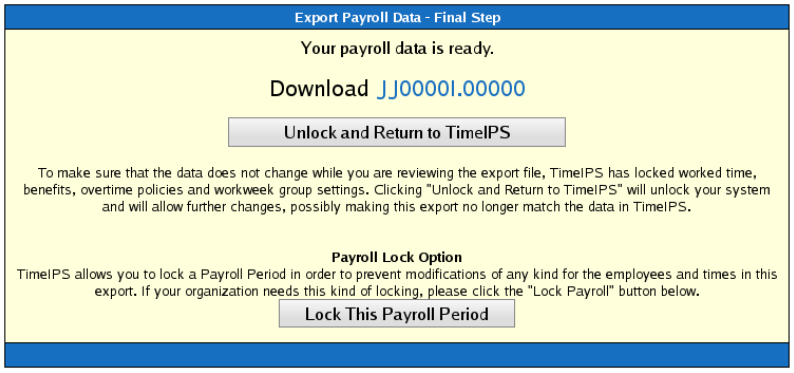


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

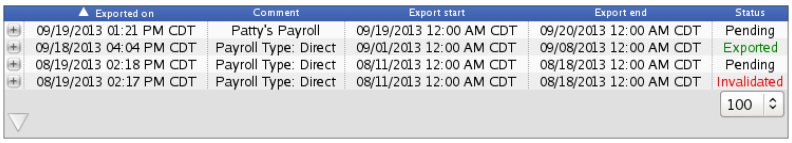


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

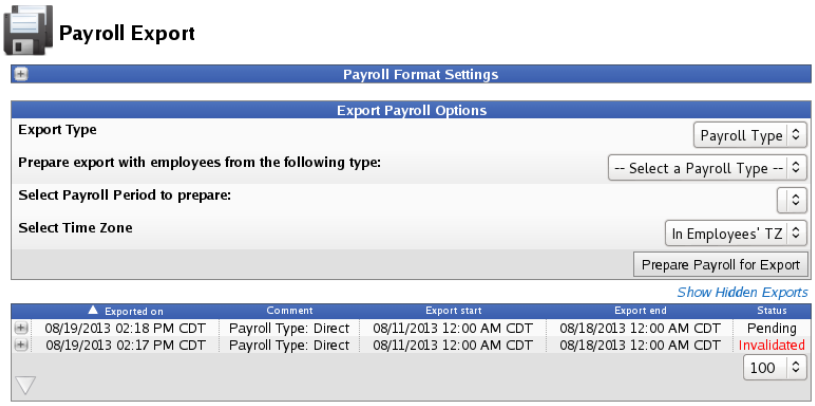
For immediate assistance with any of the above payroll exports, call our Customer Support staff at 877-846-3256.

See Also:
Payroll Export (TimeIPS Version 1.6)
Paychex 5 Export Settings

Paychex Paylink 9 Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. The file can be opened in a spreadsheet application, such as Microsoft Excel or Open Office. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, the file can be imported in your Paychex Paylink 9 payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

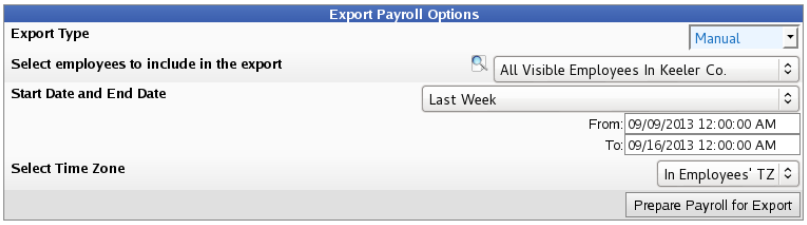
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

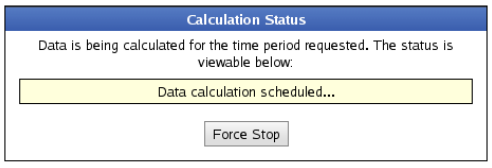
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

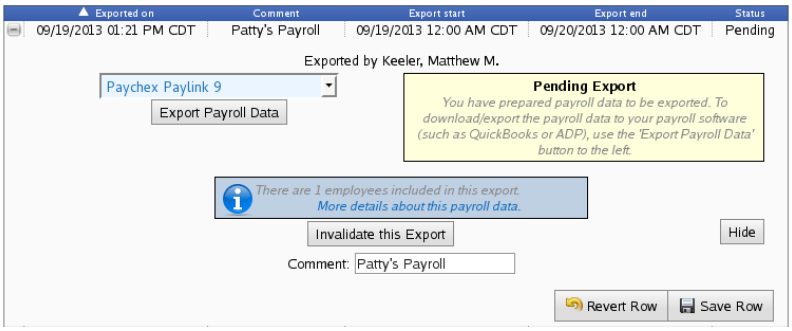


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Paychex Paylink 9** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

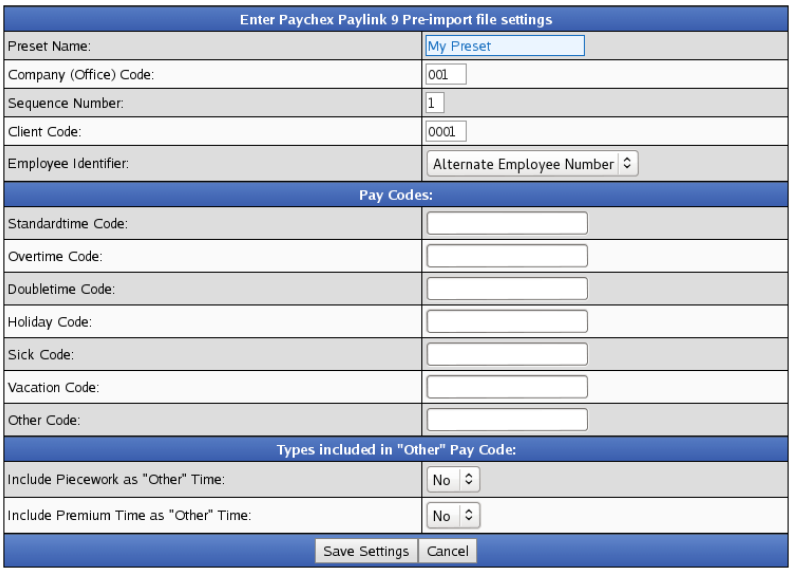
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Paychex Paylink 9** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

The preset window will appear.

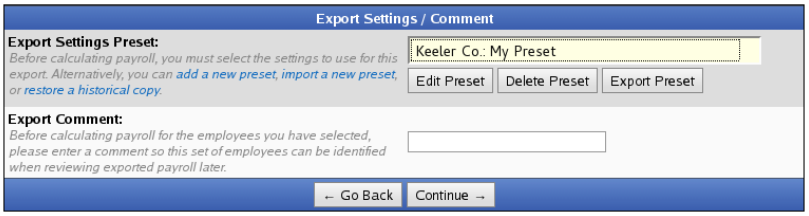


The following export settings should be defined prior to running your Paychex Paylink 9 export:

- **Preset Name:** Enter a descriptive name for your preset
- **Company (Office) Code**: Must be 3 digits (use leading zeros if less than 3 digits.) This will be exported as the "Office Code" column in your payroll export file and is used as the first 3 digits of the export file name.
- **Sequence Number:** This is the 1-digit Paychex site code. This will be used as the last digit in your export file name.

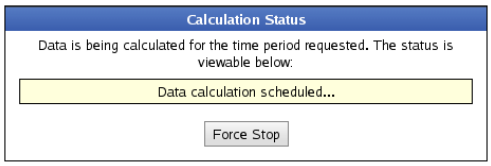
- **Client Code:** Enter the 4-digit Paychex client number. This number will be used in between the Company Code and Sequence Number in the export file name and will be exported as the "Client Code" column in your payroll export file.
- **Employee Identifier:** Your choices are "Alternate Employee Number", "Social Security Number (SSN)", or "Badge Number"
- **Standardtime Code:** Enter the Code used to define regular hours
- **Overtime Code:** Enter the Code used to define overtime hours
- **Doubletime Code:** Enter the Code used to define Doubletime hours
- **Holiday Code:** Enter the Code used to identify Holiday hours
- **Sick Code:** Enter the Code used to identify Sick hours
- **Vacation Code:** Enter the Code used to identified Vacation hours
- **Other Code**: Enter in a code for another pay time not already identified.
- **Include Piecework as "Other" Time:** Choose "Yes" to include piecework hours with "Other" hours, otherwise, leave this option at "No".
- **Include Premium Time as "Other" Time:** Choose "Yes" to include premium hours with "Other" hours, otherwise, leave this option at "No".

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

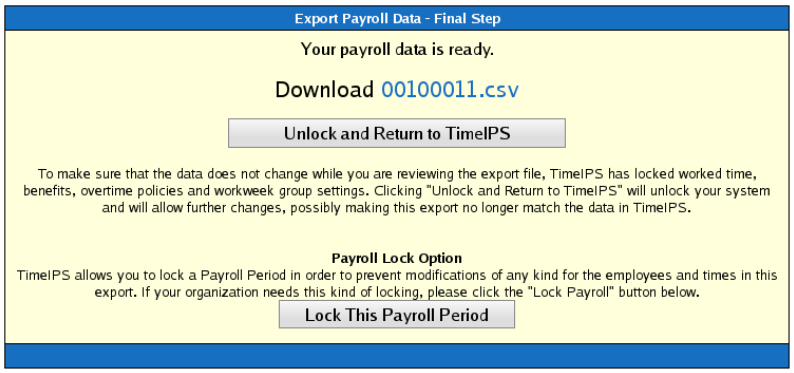


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

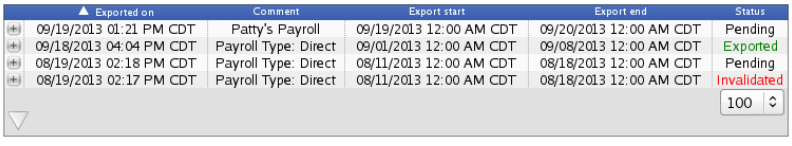


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

For immediate assistance with any of the above payroll exports, call our Customer Support staff at 877-846-3256.

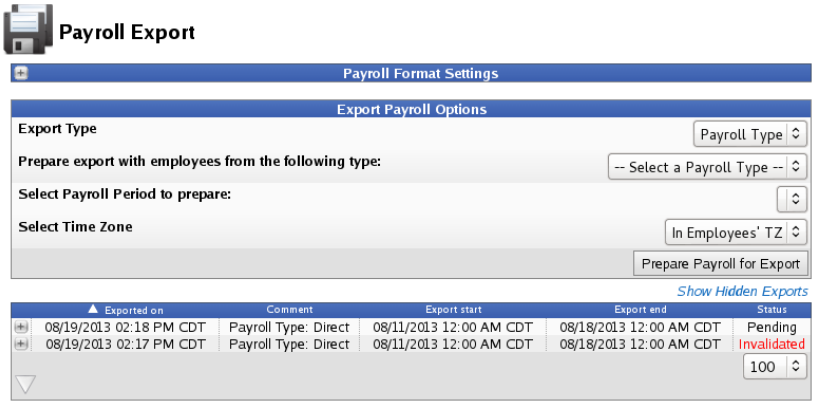
Internal Information (visible to Administrators only):

See Also:
Payroll Export (TimeIPS Version 1.6)
Paychex Paylink 9 Export Settings
Paywork Export Settings

Paychex Preview 6.4 (RapidPay) Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, the file can be imported into your Paychex Preview 6.4 (RapidPay) payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

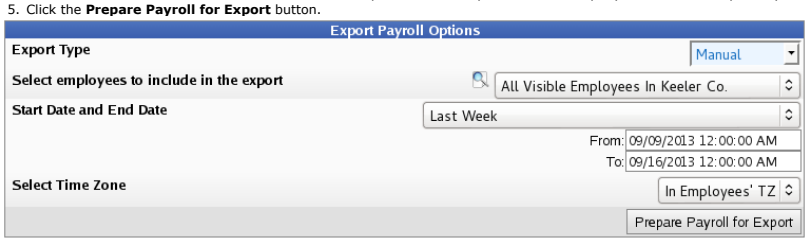
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

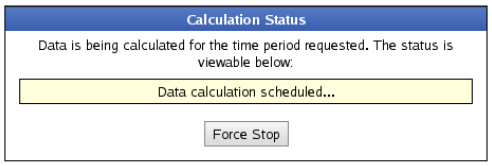
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

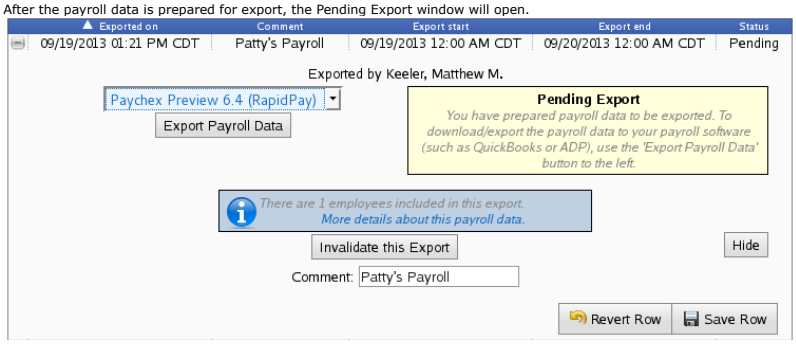


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Paychex Preview 6.4 (RapidPay)** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

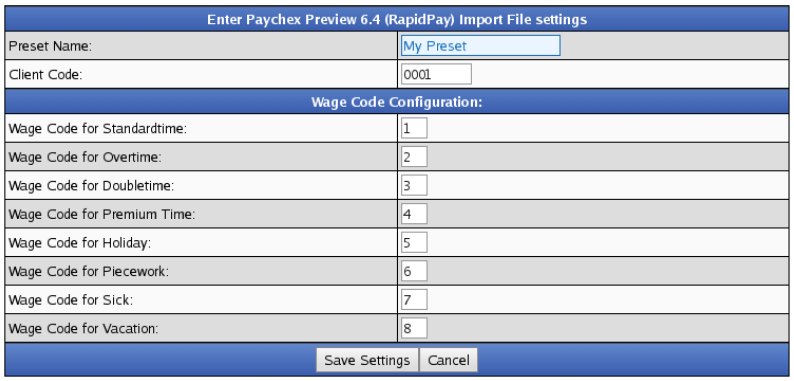
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Paychex Preview 6.4 (RapidPay)** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

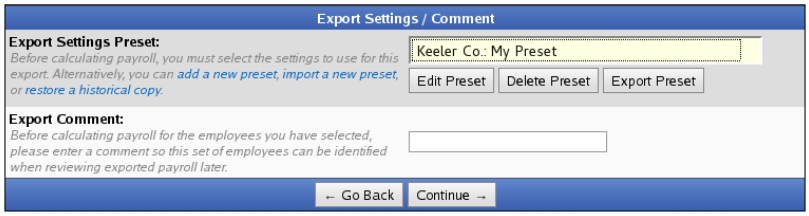
The preset window will appear.



The following export settings should be defined prior to running your Paychex Preview 6.4 export:

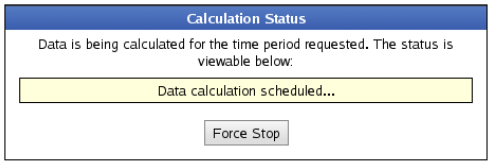
- **Preset Name:** Enter the name you wish to assign to the preset.
- **Client ID**: Enter the 4-digit Paychex client number. This number will be used in the export file name and will be exported as the "Client Code" column in your payroll export file.
- Modify the **Wage Codes** if needed.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

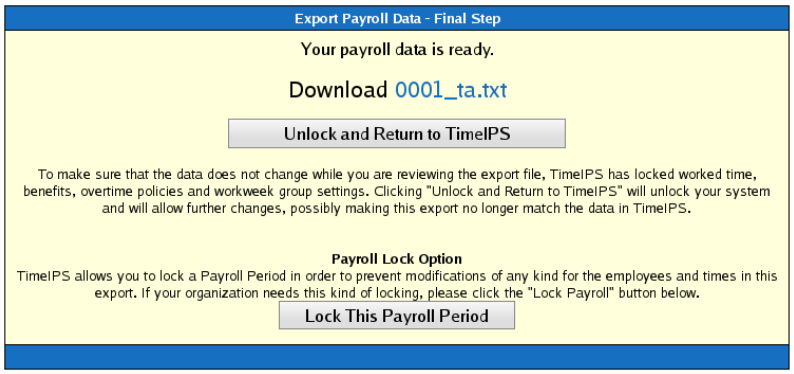


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.



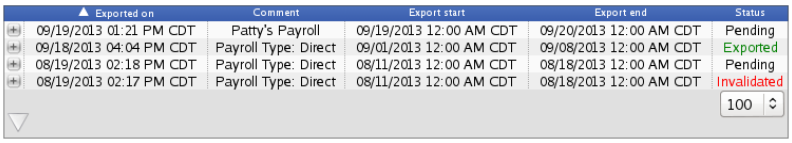
Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported

again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

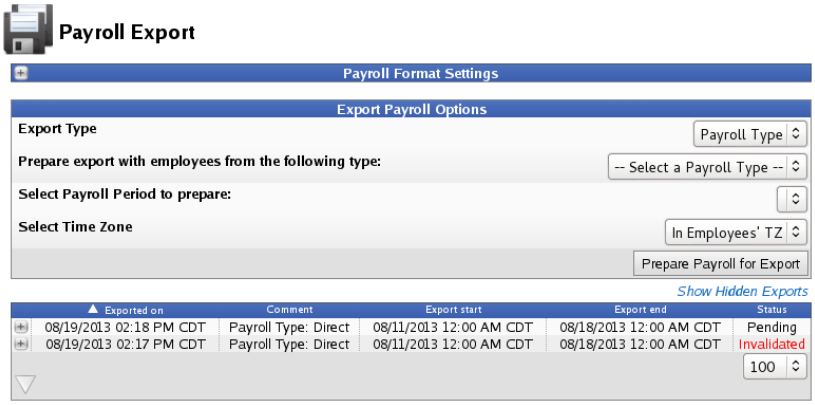
For immediate assistance with any of the above payroll exports, call our Customer Support staff at 877-846-3256.

See Also:
Payroll Export (TimeIPS Version 1.6)
Paychex Preview 6.4 (RapidPay) Export Settings

Paywork Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, the file can be imported in your Paywork payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

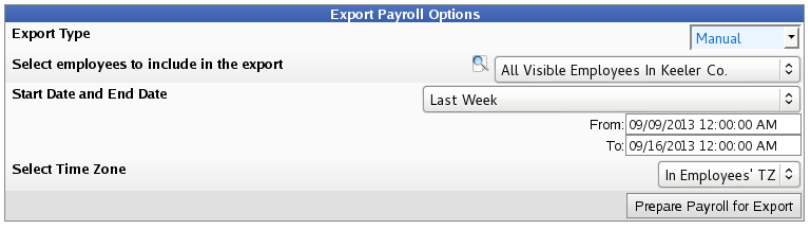
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

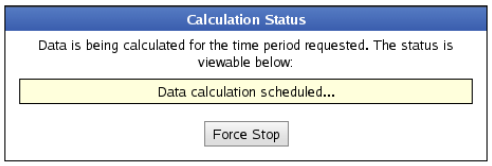
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

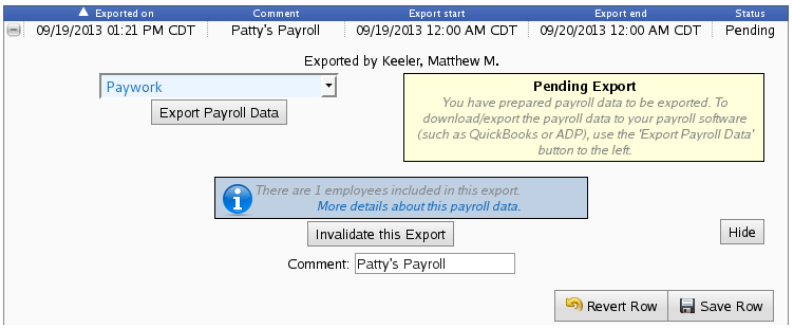


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **Paywork** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

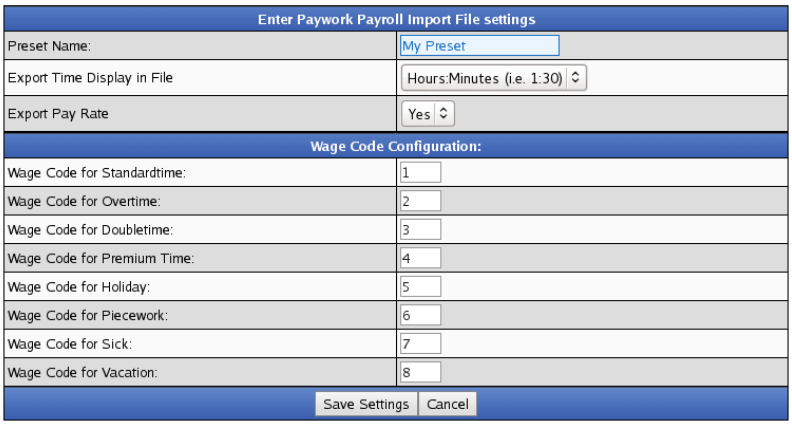
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **Paywork** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

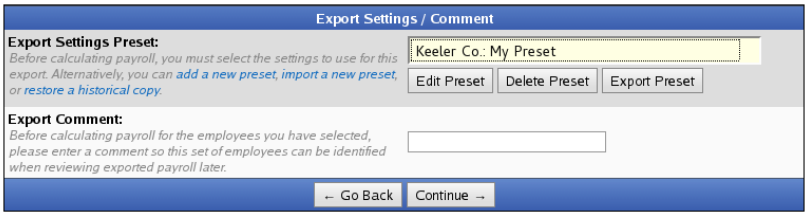
The preset window will appear.



The following export settings should be defined prior to running your Payworkl export:

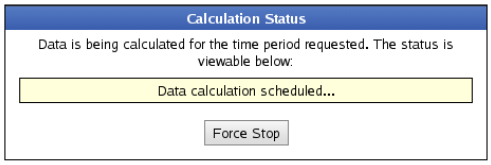
- **Preset Name:** Enter a descriptive name for your preset
- **Export Time Display in File**: From the drop down menu, choose whether the time is to be displayed in Hours:Minutes or in Decimals.
- **Export Pay Rate**: Choose "No" to exclude pay rates, otherwise, leave this option at "Yes".
- Modify the **Wage Codes** if needed.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

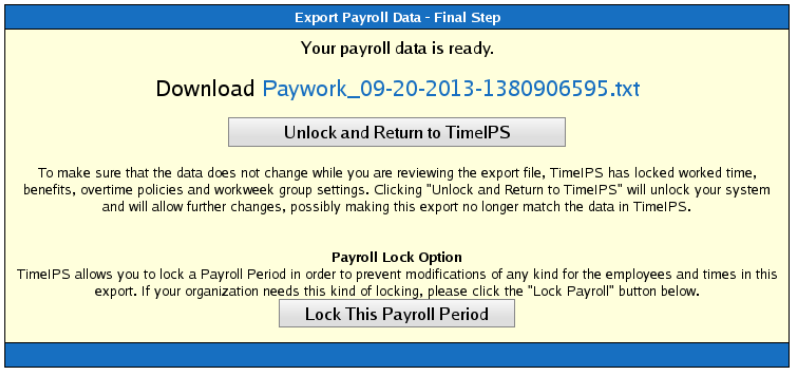


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.



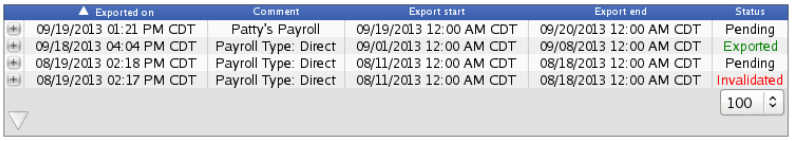
Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.

- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

For immediate assistance with any of the above payroll exports, call our Customer Support staff at 877-846-3256.

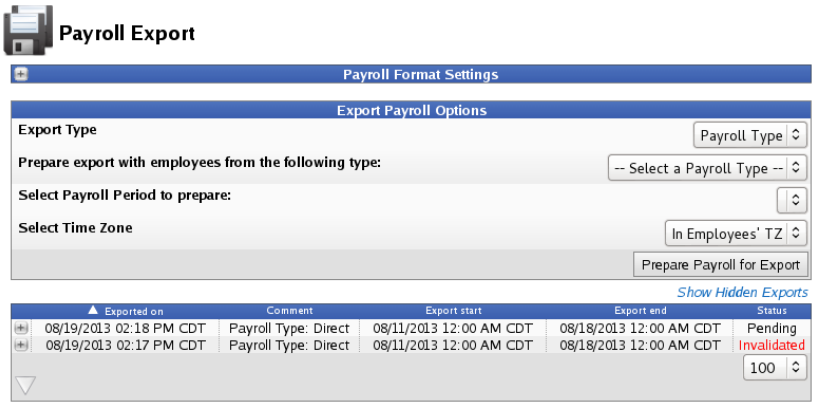
Internal Information (visible to Administrators only):

See Also:
Payroll Export (TimeIPS Version 1.6)
Paychex Paylink 9 Export Settings
Paychex Paylink 9 Export Settings

Peachtree Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. Using the IPSEPI Enhanced Payroll Integration module, the file can be imported in your Peachtree payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export

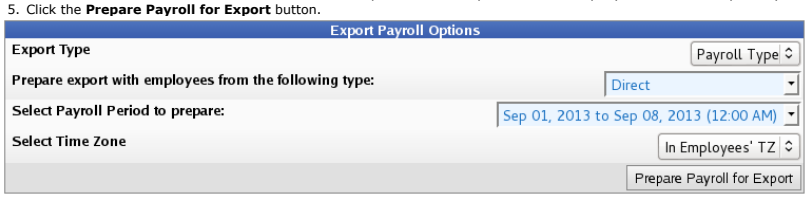


Prepare Payroll for Export

First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

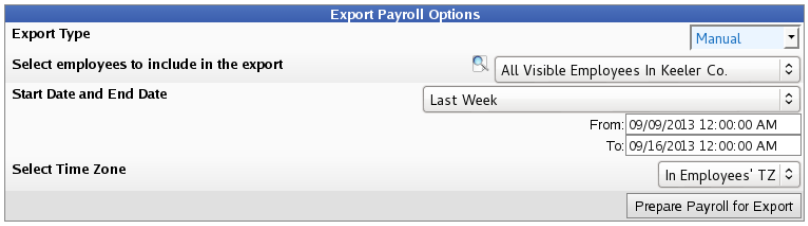
Payroll Type

1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

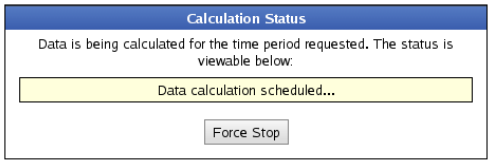


Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

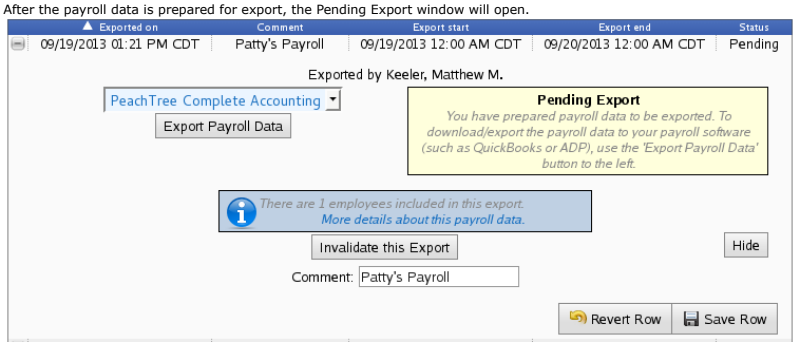


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **PeachTree Complete Accounting** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

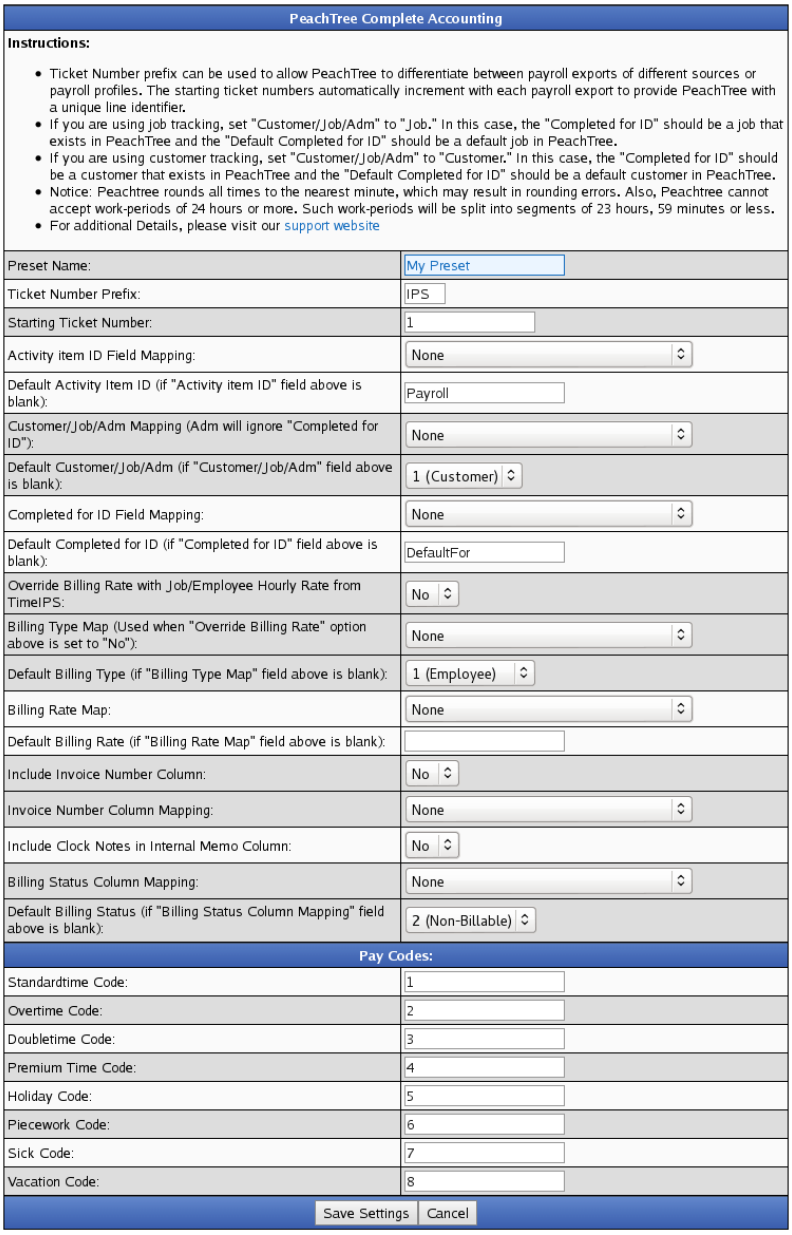
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **PeachTree** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

The preset window will appear.



PeachTree Complete Accounting

Instructions:

- Ticket Number prefix can be used to allow PeachTree to differentiate between payroll exports of different sources or payroll profiles. The starting ticket numbers automatically increment with each payroll export to provide PeachTree with a unique line identifier.
- If you are using job tracking, set "Customer/Job/Adm" to "Job." In this case, the "Completed for ID" should be a job that exists in PeachTree and the "Default Completed for ID" should be a default job in PeachTree.
- If you are using customer tracking, set "Customer/Job/Adm" to "Customer." In this case, the "Completed for ID" should be a customer that exists in PeachTree and the "Default Completed for ID" should be a default customer in PeachTree.
- Notice: Peachtree rounds all times to the nearest minute, which may result in rounding errors. Also, Peachtree cannot accept work-periods of 24 hours or more. Such work-periods will be split into segments of 23 hours, 59 minutes or less.
- For additional Details, please visit our support website

Preset Name:	My Preset
Ticket Number Prefix:	IPS
Starting Ticket Number:	1
Activity item ID Field Mapping:	None
Default Activity Item ID (if "Activity item ID" field above is blank):	Payroll
Customer/Job/Adm Mapping (Adm will ignore "Completed for ID"):	None
Default Customer/Job/Adm (if "Customer/Job/Adm" field above is blank):	1 (Customer)
Completed for ID Field Mapping:	None
Default Completed for ID (if "Completed for ID" field above is blank):	DefaultFor
Override Billing Rate with Job/Employee Hourly Rate from TimeIPS:	No
Billing Type Map (Used when "Override Billing Rate" option above is set to "No"):	None
Default Billing Type (if "Billing Type Map" field above is blank):	1 (Employee)
Billing Rate Map:	None
Default Billing Rate (if "Billing Rate Map" field above is blank):	
Include Invoice Number Column:	No
Invoice Number Column Mapping:	None
Include Clock Notes in Internal Memo Column:	No
Billing Status Column Mapping:	None
Default Billing Status (if "Billing Status Column Mapping" field above is blank):	2 (Non-Billable)
Pay Codes:	
Standardtime Code:	1
Overtime Code:	2
Doubletime Code:	3
Premium Time Code:	4
Holiday Code:	5
Piecework Code:	6
Sick Code:	7
Vacation Code:	8

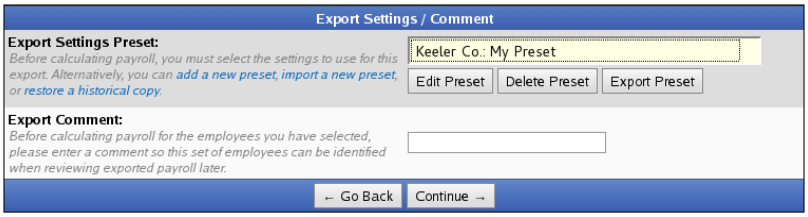
Save Settings Cancel

The following export settings should be defined prior to running your Peachtree export:

- **Preset Name:** Enter the name you wish to assign to the preset.
- **Ticket Number Prefix** and **Starting Ticket Number:** Each time ticket transaction in Peachtree has a unique ticket number. You can define the Ticket Number Prefix (such as IPS) and the starting ticket number (such as 1). The first transaction TimeIPS submits will be IPS1 and will increment the ticket number by 1 for each transaction.
- **Activity item ID Field Mapping** and **Default Activity Item (if "Activity item ID" field above is blank):**
  - If all transactions should be imported into a single Activity Item, set the Activity Item ID Field Mapping to Use default and enter the Peachtree Activity Item ID in the Default Activity Item ID field.
  - If you are storing Activity Item IDs for each employee or transaction in a TimeIPS field (such as the Employee's Department or Job Control Number), select that field in the Activity Item ID Field Mapping pull-down. Enter the Default Activity Item ID TimeIPS should use if the mapped field's value is blank for any transaction.
- **Customer/Job/Adm (Adm will ignore "Completed for ID"), Completed for ID Field Mapping** and **Default Completed for ID (if "Completed for ID" field above is blank):**
  - If all transactions should be imported as Administrative Time Tickets (not per job), set the Customer/Job/Adm to Adm, leave the Completed for ID Field Mapping to Blank, and Default Completed for ID blank.
  - If you are storing Job or Customer IDs for each employee or transaction in a TimeIPS field (such as Employee's Department for Job Code), set the Customer/Job/Adm either to Customer (indicating Customer ID) or Job (indicating Job ID), select the TimeIPS field in the Completed for ID Field Mapping pull-down, and enter the Default Completed for ID TimeIPS should use if the mapped field's value is blank for any transaction.
- **Override Billing Rate with Job/Employee Hourly Rate from TimeIPS, Billing Type Map (Used when "Override Billing Rate" option above is set to "No")** and **Default Billing Type (if "Billing Type Map" field above is blank)**:
  - TimeIPS can provide Peachtree with employee's hourly rates as the Peachtree Job/Customer Billing Rate for each transaction. If you want to use this functionality, set the pull-down to Yes.
  - If you are storing Billing Types for each employee or transaction in a TimeIPS field (such as the Employee's Department or Job Control Number), select that field in the Billing Type Map pull-down, and enter the Default Billing Type TimeIPS should use if the mapped field's value is blank for any transaction.
- **Billing Rate Map** and **Default Billing Rate (if "Billing Rate Map" field above is blank)**:
  - If you are storing Billing Rates for each employee or transaction in a TimeIPS field (such as the Employee's Department or Job Control Number), select that field in the Billing Rate Map pull-down, and enter the Default Billing Rate TimeIPS should use if the mapped field's value is blank for any transaction.
- **Include Invoice Number Column** and **Invoice Number Column Mapping**:
  - If you want to include an invoice number column, set the pull-down to Yes.
  - If you are storing invoice numbers for each employee or transaction in a TimeIPS field (such as the Employee's Department or Job Control Number), select that field in the Invoice

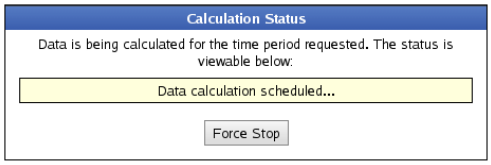
Number Column Mapping pull-down.
- **Include Clock Notes in Internal Memo Column**: If you want to include clock notes in the internal memo column, set the pull-down to Yes.
- **Billing Status Column Mapping** and **Default Billing Status (if "Billing Status Column Mapping" field above is blank)**:
  - If you are storing Billing Statuses for each employee or transaction in a TimeIPS field (such as the Employee's Department or Job Control Number), select that field in the Billing Status Column Map pull-down, and select the Default Billing Status TimeIPS should use if the mapped field's value is blank for any transaction.
- **Standardtime Code:** Enter the Code used to define regular hours
- **Overtime Code:** Enter the Code used to define overtime hours
- **Doubletime Code:** Enter the Code used to define Doubletime hours
- **Premium Time Code:** Enter the Code used to identify Premium hours
- **Holiday Code:** Enter the Code used to identify Holiday hours
- **Piecework Code:** Enter the Code used to identify Piecework hours
- **Sick Code:** Enter the Code used to identify Sick hours
- **Vacation Code:** Enter the Code used to identified Vacation hours

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

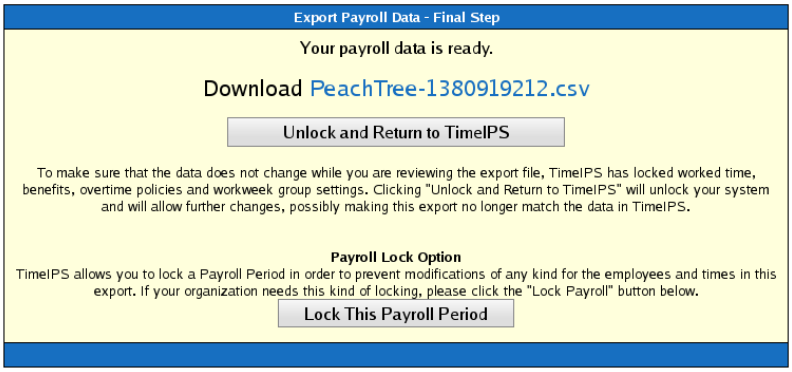


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

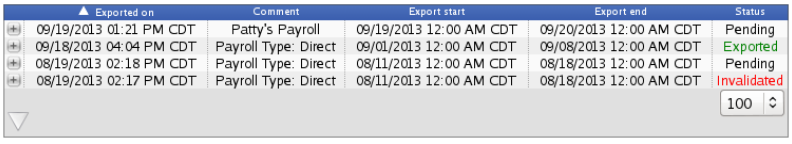


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

For immediate assistance with any of the above payroll exports,

call our Customer Support staff at 877-846-3256.

Setting up Peachtree

NOTE: You must have pay rates in Peachtree for each type of pay (example: overtime, standard, vacation). Without them, you will get an error during the import about the pay type. Peachtree only supports 40 hours for salary employees so TimeIPS will only export standard time for employees marked salaried.

Step 1: Setting Employees to use Time Tickets

- From the Maintain menu, select Maintain Employees/Sales Reps. Peachtree displays the Maintain Employees Sales Reps window.
- Select the Pay Info tab.
- Enter or select the employee ID. To display a list of existing employees, type ? in this field, or select the Lookup button.
- Select Hourly-Time Ticket Hours from the Pay Method list.
- Verify or enter appropriate pay rates for each hourly pay level.
- select the Save button.

Step 2: Creating a Default Activity Item for Payroll

NOTE: If you already have an Activity Item for payroll you can skip this step.

- Select Inventory Items from the Maintain menu.
- Enter a unique item ID for the activity item.
- Select either Activity item as the item class.
- Enter a short description of the activity item.
- Enter the Stocking U/M, Item Type, and Location for the item.
- The default G/L income account is displayed. If this is not correct, you can change the account to something more appropriate for this particular item.
- Select the Item Tax Type code (this determines whether or not the item is exempt from taxes).
- select the Save button.

Step 3: Creating an Import Template

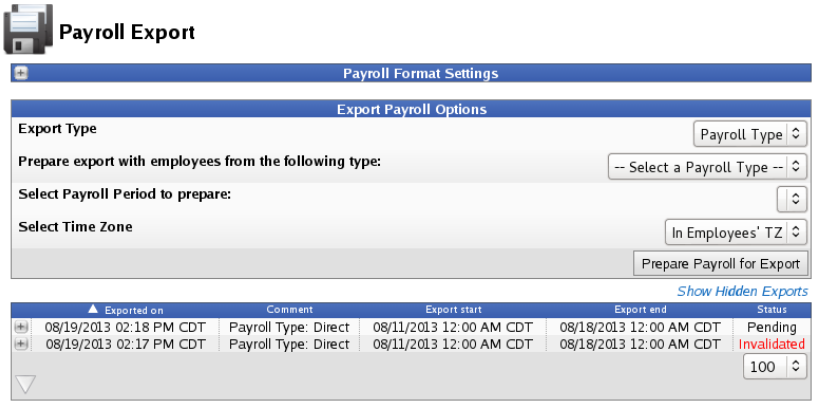
- Select Import/Export from the File menu.
- On The Fields Tab only have the following marked to Show.
  - Employee/Vendor, Recorded by ID, Ticket Number, Ticket Date, Has been used in Sales/Invoicing, Activity Item ID, Customer/Job/Adm, Completed for ID, Pay Level, Has been used in Payroll, Manual/Timed Option, Duration, Billing Type, Billing Rate, Billing Status, Billing Amount
- Select the Options Tab.
- Put a check mark in the First Row Contains Headings box under Import Options.
- Under Import/Export File click on the arrow and choose the location where you plan on saving your Peachtree export file from TimeIPS.
- Click on the Save button and name the Settings TimeIPS.

See Also:
Payroll Export (TimeIPS Version 1.6)
Peachtree Export Settings

PeopleSoft 8 Export Settings

TimeIPS Payroll Export can generate a file with your payroll data. Using the Payroll Integration with Benefits Tracking (IPSQBI) optional module, the file can be imported into the PeopleSoft 8 payroll application.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

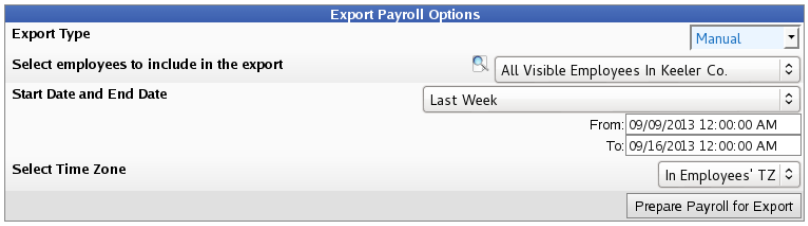
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

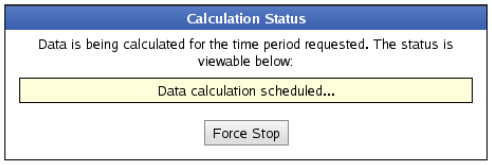
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

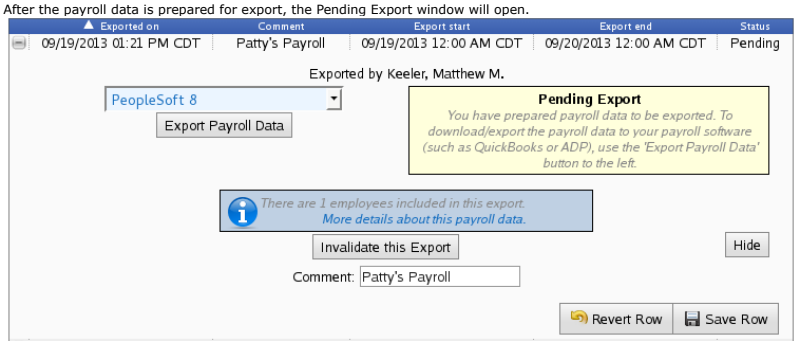


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **PeopleSoft 8** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

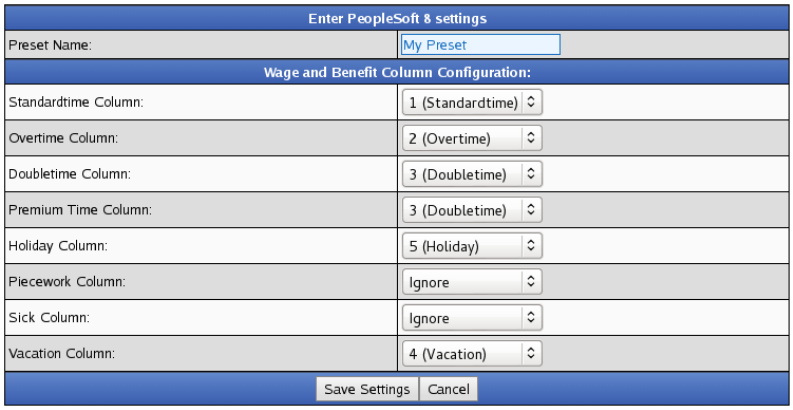
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **PeopleSoft** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

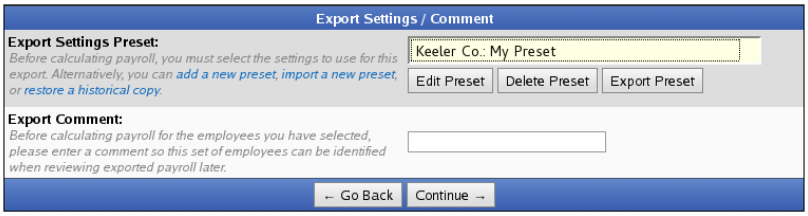
The preset window will appear.



The following export settings should be defined prior to running your PeopleSoft export:

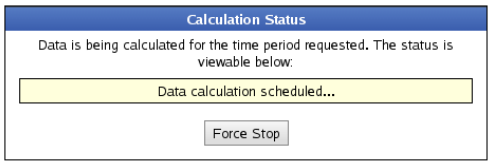
- **Preset Name:** Enter the name you wish to assign to the preset.
- Modify the **Wage Codes** if needed.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

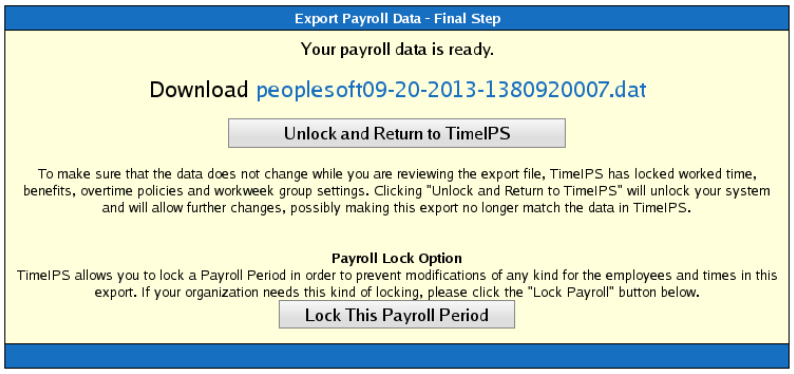


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.

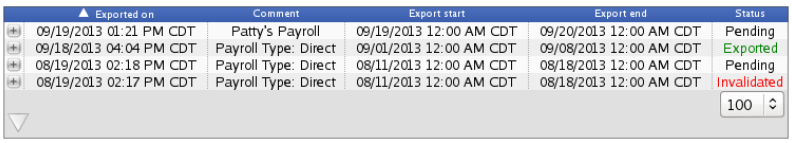


Payroll Export Data - Final Step



- Click the **blue** link to **Download** the data and open it in a spreadsheet program such as Open Office Calc or Microsoft Excel.
- If you have confirmed that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Lock This Payroll Period**, otherwise choose **Unlock and Return to TimeIPS.** Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Unlock and Return to TimeIPS.", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Lock This Payroll Period", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

For immediate assistance with any of the above payroll exports, call our Customer Support staff at 877-846-3256.

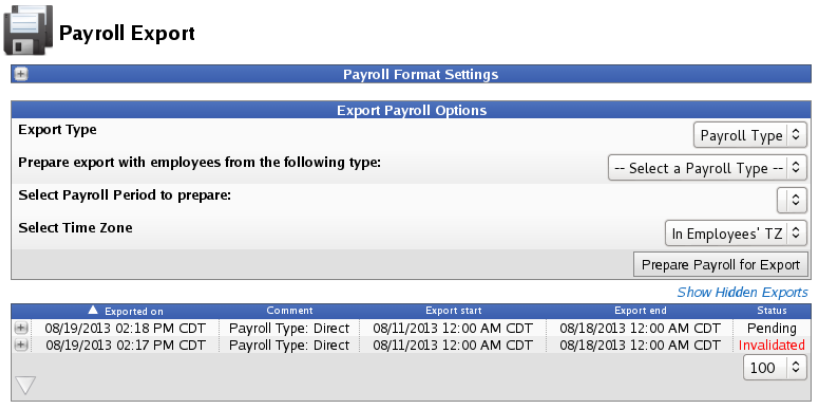
See Also:
Payroll Export
PeopleSoft 8 Export Settings

QuickBooks Integration - Setup TimeIPS

Before running the QuickBooks Integration for the first time, you will need to setup your TimeIPS QuickBooks Payroll Export Settings. These settings do not need to be adjusted each time you run the Integration unless changes are made to your QuickBooks Payroll Items or other settings.

You will also need to set up QuickBooks prior to running payroll. Review the **QuickBooks Integration - Setup QuickBooks** article for instructions.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



Prepare Payroll for Export

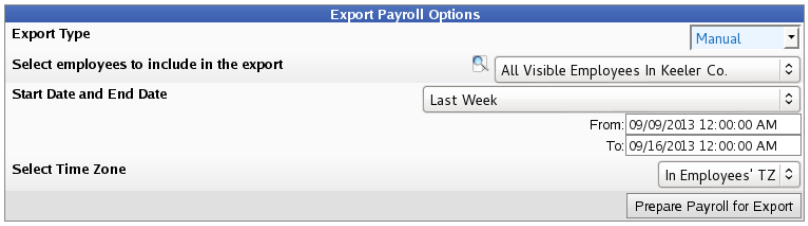
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

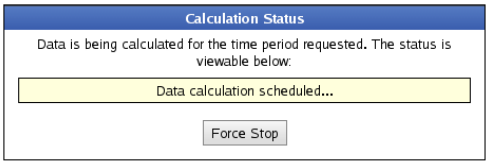
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

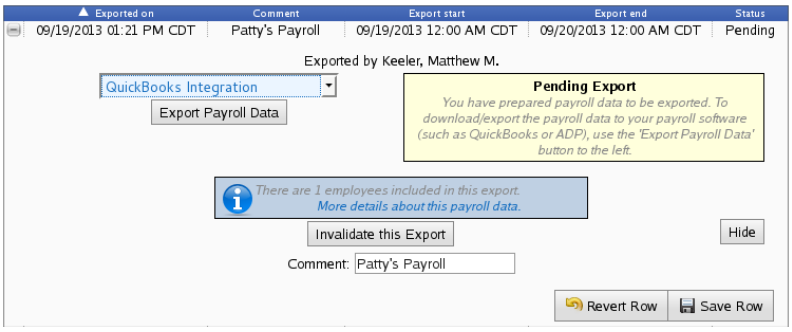


Next you should see the payroll calculation being scheduled.



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.



1. Select **QuickBooks Integration** from the drop down menu.
2. Next click on the button labeled **Export Payroll Data.**

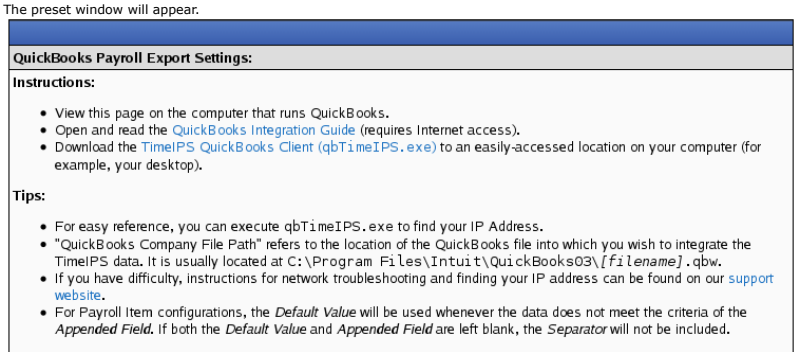
NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

If you have not already created a **QuickBooks Integration** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

The preset window will appear.



QuickBooks Payroll Export Settings:

Instructions:

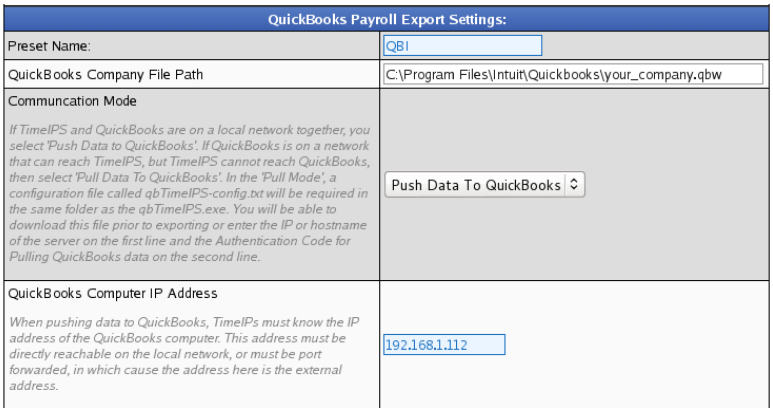
- View this page on the computer that runs QuickBooks.
- Open and read the QuickBooks Integration Guide (requires Internet access).
- Download the TimeIPS QuickBooks Client (qbTimeIPS.exe) to an easily-accessed location on your computer (for example, your desktop).

Tips:

- For easy reference, you can execute qbTimeIPS.exe to find your IP Address.
- "QuickBooks Company File Path" refers to the location of the QuickBooks file into which you wish to integrate the TimeIPS data. It is usually located at C:\Program Files\Intuit\QuickBooks03*[filename]*.qbw.
- If you have difficulty, instructions for network troubleshooting and finding your IP address can be found on our support website.
- For Payroll Item configurations, the *Default Value* will be used whenever the data does not meet the criteria of the *Appended Field*. If both the *Default Value* and *Appended Field* are left blank, the *Separator* will not be included.

- If you have not done so already, download the TimeIPS QuickBooks Client.
- From the QuickBooks Payroll Export Settings page (shown above), click on the **TimeIPS QuickBooks Client (qbTimeIPS.exe)** link at the top of the page and save to an easily-accessed location on your computer, such as your desktop.

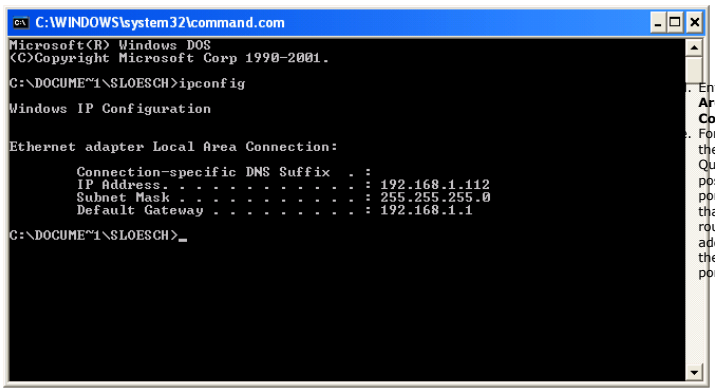
NOTE: You will launch this application each time you run the payroll integration.



QuickBooks Payroll Export Settings:	
Preset Name:	QBI
QuickBooks Company File Path	C:\Program Files\Intuit\Quickbooks\your_company.qbw
Communcation Mode *If TimeIPS and QuickBooks are on a local network together, you select 'Push Data to QuickBooks'. If QuickBooks is on a network that can reach TimeIPS, but TimeIPS cannot reach QuickBooks, then select 'Pull Data To QuickBooks'. In the 'Pull Mode', a configuration file called qbTimeIPS-config.txt will be required in the same folder as the qbTimeIPS.exe. You will be able to download this file prior to exporting or enter the IP or hostname of the server on the first line and the Authentication Code for Pulling QuickBooks data on the second line.*	Push Data To QuickBooks
QuickBooks Computer IP Address *When pushing data to QuickBooks, TimeIPs must know the IP address of the QuickBooks computer. This address must be directly reachable on the local network, or must be port forwarded, in which cause the address here is the external address.*	192.168.1.112

- Change the **QuickBooks Payroll Export Settings**, as necessary.
- The **Preset Name** can be anything you choose. In this example we have used the name **QB**I
- The **QuickBooks File Company Path** is the path you wrote down in "SETUP QUICKBOOKS Company info - step 4."
- The **Communication Mode** is determined by networking.
  - If TimeIPS and QuickBooks are on a local network together, you select '**Push Data to QuickBooks**'.
  - If QuickBooks is on a network that can reach TimeIPS, but TimeIPS cannot reach QuickBooks, then select '**Pull Data To QuickBooks**'. In the 'Pull Mode', a configuration file called qbTimeIPS-config.txt will be required in the same folder as the qbTimeIPS.exe. You will be able to download this file prior to exporting or enter the IP or hostname of the server on the first line and the Authentication Code for Pulling QuickBooks data on the second line.
- The **QuickBooks Computer IP Address** is the IP address of the computer that contains the QuickBooks program and is where you will run the Integration. Unless, you are port forwarding, in which cause the address here is the external address.
  - **Ask your network administrator.**

  OR
  - **To Identify your Computer's IP Address:**
    a. Go to the Start menu - **Run option.**
    b. In the Open/Run window, type in the following command and press ENTER: **command**
    c. In the Command prompt, type in the following command and press ENTER: **ipconfig**



7. Enter the IP address listed under the **Ethernet Adapter Local Area Network Connection** listing as the **QuickBooks Computer IP Address**.
8. For security reasons, we highly recommend that TimeIPS be on the same network as the system running QuickBooks. If your QuickBooks system is not on the same network as TimeIPS, it is possible to allow TimeIPS to communicate with QuickBooks by port forwarding TCP 6035 from your computer to an IP address that can be seen by TimeIPS. This would normally be done on a router or Internet gateway. For this configuration, enter the IP address that is port forwarding 6035, rather than the IP address of the computer running QuickBooks. If you need help configuring port forwarding, please ask your network administrator.

QuickBooks Export Options:	
Name format used in QuickBooks	First Middle Last
Shorten middle names to initial of length	1 (This must match QuickBooks for employees to be found).
Automatically check the Employee's "Use time data to create paychecks" box in QuickBooks, if needed	Yes
Automatically Create Employees in QuickBooks if not found	Yes
Limit Employees without Hourly Rates (unconfigured pay rate or Salary rates only) to Standard Time	No
Export Current Available Sick and Vacation Hours into QuickBooks. **These will be the original "Sick" and "Vacation" benefit types only, even if they have been renamed.**	Yes
Check for existence of Entities in QuickBooks before starting Export	Yes

- Change the **QuickBooks Payroll Options**, as necessary.
  - Select the **Name format used in Quickbooks** based on how you have names displayed in QuickBooks.

    NOTE: This format MUST match, and the names must match exactly or QuickBooks will be unable to receive payroll data.

  - Select the number of middle name characters to use during the Integration in the **Shorten middle names to initial of length** pull-down. Since names in QuickBooks must match exactly, and Quickbooks only provides 5 characters for the middle name, this option allows the middle name in TimeIPS to be shortened to match.
  - Select **Yes** in the **Automatically check the Employee's Use time data to create paychecks" box in QuickBooks, if needed**. TimeIPS will then automatically select this setting for each employee in QuickBooks.
  - Choose whether or not to **Automatically Create Employees in Quickbooks if not found**. Use this option only if you know your name format matches exactly. If you turn this option on, employees in QuickBooks will be duplicated if the name or name format is different in TimeIPS.
  - Select **Yes** in the **Limit Employees without Hourly Rates (unconfigured pay rate or Salary rates only) to Standard Time** pull-down if you do not want salary employees to post overtime and double time hours into QuickBooks, otherwise select **No**.
  - Select **Yes** in the **Export Current Available Sick and Vacation Hours into QuickBooks** if you want TimeIPS to export employee's current available benefit time, otherwise select **No**.
  - Select **Yes** in the **Check for existence of Entities in QuickBooks before starting Export** if you want TimeIPS to make sure all the employees, pay types, customers, jobs, etc. that will be used for the export exist in QuickBooks before stating to send any time data. If this option is off, TimeIPS will send data until an error occurs, then will stop, resulting in a partial payroll export in QuickBooks. If this happens, you'll need to fix the errors and re-run payroll to complete the export.

QuickBooks Payroll Items Configuration:				
	Pay Type	Separator	Appended Field	Default Value
Payroll Item for Standardtime:	Regular Pay			
Payroll Item for Overtime:	Overtime Pay			
Payroll Item for Doubletime:	Doubletime Pay			
Payroll Item for Premium Time:	Premium Time			
Payroll Item for Holiday:	Holiday Pay			
Payroll Item for Piecework:	Piecework			
Payroll Item for Sick:	Sick Pay			
Payroll Item for Vacation:	Vacation Pay			

- Enter the corresponding **QuickBooks Payroll Item** codes exactly as they appear in QuickBooks.
  - In some cases, it may be desirable to use different Payroll Items for specific jobs, departments, or employees.

    To facilitate this, use the Separator and Appended Field/Default Value. For example, to pay two departments ("Marketing" and "Accounting") with different Payroll Items ("Regular Pay - Marketing" and "Regular Pay - Accounting"):
    1) Create both Payroll Items in QuickBooks
    2) Enter " - " as the Separator (without the quotes)
    3) Select "Employee Department" as the Appended Field.
    4) If the Appended Field could be blank, TimeIPS would attempt to export a Payroll Item like this "Regular Pay - " which QuickBooks would not match. To make sure there's always an Appended Field value, set the Default Value to what you want in this case, i.e. "Other." This will cause the Payroll Item to be "Regular Pay - Other" if an employee does not have a department.

    Be sure the total length of the Payroll Item does not exceed the QuickBooks limit of 31 characters.

NOTE: This MUST match exactly or QuickBooks will be unable to receive payroll data.

QuickBooks Job Tracking and Custom Field Values:	
Set QuickBooks "Is Billable" to	False (True for Service Item/Customer Tracking)
Set QuickBooks "Customer" to	Ignore
Default QuickBooks "Customer"	
Set QuickBooks "Service Item" to	Ignore
Default QuickBooks "Service Item"	
Set QuickBooks "Notes" to	Clock In Note
Set QuickBooks "BillableStatus" to	Ignore
Set QuickBooks "Class" to	Ignore

- The QuickBooks integration can support certain **Job Tracking** functions with a properly configured QuickBooks.
  - **Set QuickBooks "Is Billable"** as follows: If "Is Billable" is true, the tracked time is billable, and you must specify a Customer and a Service Item so that an invoice can be created. If no invoice will be created, set Is Billable to false.
  - **Set QuickBooks "Customer"** as follows: In a TimeTracking request, Customer refers to the customer or customer job to which this time could be billed. If 'Is Billable" is set to true, Customer is required. QuickBooks limits this field to 209 characters.
    - Quickbooks "Jobs" and "Phase" the job and phase in quickbooks is a subfield of the customers. To export the job and phase you would need to add it to what you have the "Customer" set to. If you have the "Customer" set to job long name you would then need to set the job's long name to something like this (example: dillions:front:checkout). In the example you have a Job in TimeIPS called dillions:front:checkout the break down in quickbooks would be that you have a customer called dillions a job called front and a phase called checkout. The name will need to have the : as a seperator as quickbooks use this to figure out the sub fields.
  - **Set Default QuickBooks "Customer"** as follows: Because a Customer is required if "Is Billable" is true, and some time events may not have a value in the **"Set QuickBooks Customer"** option above, set a default value for the Customer in these cases. For example, "Other" and be sure to create a Customer in QuickBooks called "Other."
  - **Set QuickBooks "Service Item"** as follows: The Service Item refers to services that a business charges for or purchases. Examples include specialized labor, consulting hours, and professional fees. QuickBooks limits this field to 159 characters.

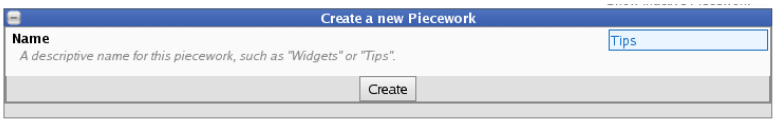
    The Service Item refers to the type of work performed. If "Is Billable" is set to true, then both Service Item and Customer are required.
  - **Set Default QuickBooks "Service Item"** as follows: Because a Service Item is required if "Is Billable" is true, and some time events may not have a value in the "Set QuickBooks Service Item" option above, set a default value for the Service Item in these cases. For example, "Other" and be sure to create a Service Item in QuickBooks called "Other."
  - **Set QuickBooks "Notes"** as follows: QuickBooks can accept an optional note field. This can be blank or any option on the drop down list. QuickBooks limits this field to 4095 characters.
  - **Set QuickBooks "BillableStatus"** as follows: The billing status of this item line or expense line. If the billing status is empty (that is, if no billing status is specified), then no BillableStatus value will be seen in QuickBooks. If set, QuickBooks limits this field to one of the following three values:
    Billable
    NotBillable
    HasBeenBilled.
  - **Set QuickBooks "Class"** as follows: Classes can be used to separate transactions into meaningful categories. (For example, transactions could be classified according to department, business location, or type of work.) For Time Tracking, Class refers to the QuickBooks class into which the timed activity falls. In QuickBooks, class tracking is off by default. QuickBooks limits this field to 159 characters. If you use a sub class this can be defined with a : (example: class name:sub class name)

QuickBooks Clock Field Values:				
	Pay Type	Separator	Appended Field	When
Clock In Note:				Do Not Export
Clock Out Note:				Do Not Export

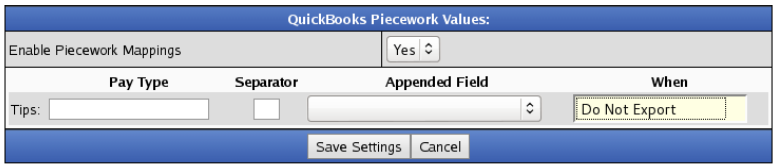
- The QuickBooks integration can support **Clock In and Out Notes** with a properly configured QuickBooks.This is a legacy feature that was used to send over extra data to QuickBooks. If you need a feature like this, consider using Piecework.

QuickBooks Piecework Values:			
Enable Piecework Mappings	No		
Pay Type	Separator	Appended Field	When
Save Settings	Cancel		

- The QuickBooks integration can support **Piecework** with a properly configured QuickBooks.
  - To **Enable Piecework Mappings**, select **Yes**.
  - Click on the **Save Settings** button to save your changes.
  - Set up Piecework using the left pane Main Menu » Administration, click on: Piecework » Piecework Admin



  - Click on the **+** (plus) sign to the left of the **Create a new Piecework** bar.
  - Add a descriptive **Name** for this piecework, such as "Widgets" or "Tips".
  - Click on the **Create** button to save.
  - Return to the QuickBooks Preset, and this new Piecework will be displayed and ready for configuration.

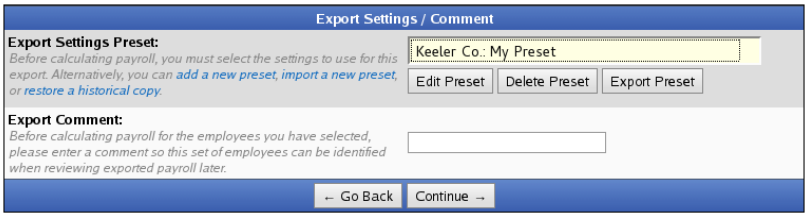


NOTE: TimeIPS doesn't push the Pay Rate information into QuickBooks.

NOTE: TimeIPS doesn't push the Pay Type into QuickBooks. QuickBooks defaults this to an Hourly employee setting.

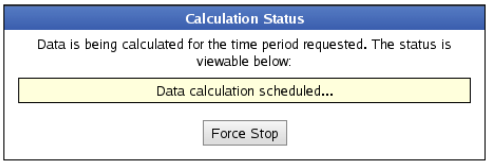
NOTE: QuickBooks is picky about special characters. Please DO NOT use symbols or special characters such as ! @ # $ % ^ & * ? , etc. in any field that will be exported. For example, employee names, job names, employee or job code, customer name, or payroll items.

- Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.

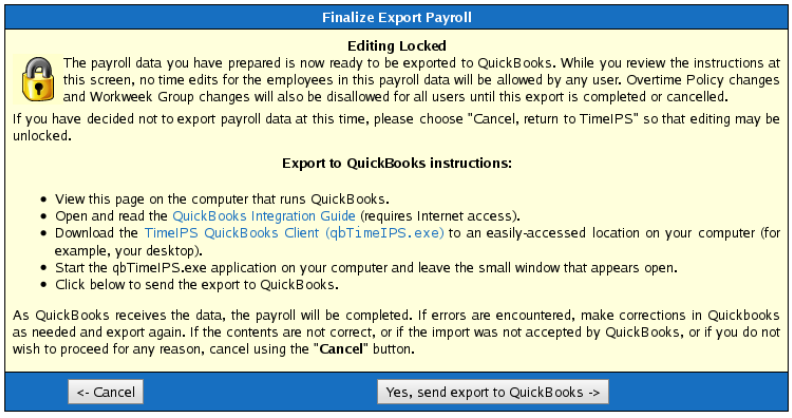


1. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
2. Optionally, you can add a comment to the export making it unique and easily identifiable.
3. Click **Continue.**

Next you should see the payroll calculation being scheduled.



Payroll Export Data - Final Step



- If you are confident that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Yes, send export to QuickBooks** otherwise choose **Cancel**. Locking the payroll period prevents future modifications of any kind.

NOTE: If you choose "Cancel", the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
If you choose "Yes, send export to QuickBooks", the payroll status will show "Exported". Exported payroll runs are locked and time can no longer be edited in the system for that period of time.

Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

For immediate assistance with any of the above payroll exports, call our Customer Support staff at 877-846-3256.

You have now setup TimeIPS for QuickBooks.

You will also need to setup QuickBooks prior to running payroll. Review the **QuickBooks Integration - Setup QuickBooks** article for instructions.

Then you are ready to Run Payroll.

Internal Information (visible to Administrators only):

Quickbooks API Docs:
http://developer.intuit.com/qbSDK-current/OSR/OnscreenRef/index-QBD.html

Look for the TimeTrackingAdd request docs

QuickBooks Integration - Setup QuickBooks

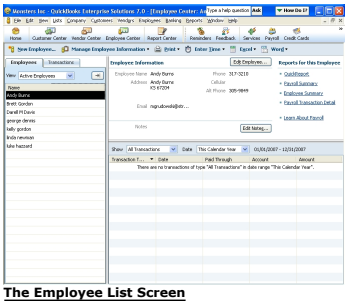
Before running the QuickBooks® Integration for the first time, you need to setup QuickBooks and TimeIPS. This article discusses the QuickBook settings that need to be adjusted prior to the integration.

NOTE: The instructions provided below are based on the QuickBooks Enterprise Solutions v7.0. These steps and their location within your series and version of QuickBooks may vary slightly. If you are unable to locate the option in your QuickBooks version, please refer to your version's Help guide.

Open your QuickBooks company file.

A. Setup Employee Information.

Go to the Employees menu - Employee Center.



The Employee List Screen

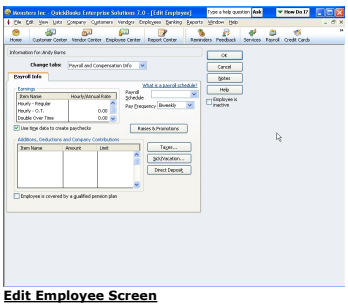
1. Verify that employee's **First Name, Middle Name/Middle Initial,** and **Last Name** match exactly (letter for letter including punctuation and capitalization) between QuickBooks and TimeIPS.

   NOTE: QuickBooks stores up to 5 characters of the middle name. You can set the number of characters TimeIPS should use during the integration. If the employee's middle name in QuickBooks and the shortened middle name in TimeIPS do not match, the integration will fail. Therefore, be sure to enter the middle names identically in both programs and indicate the number of characters TimeIPS should use during the integration when setting up TimeIPS.

   EXAMPLE: Johnathon Alexander Smith is an employee. His name is entered as Johnathon Alexa Smith in Quickbooks because QuickBooks will store only the first 5 characters. In TimeIPS, the entire middle name can be entered as long as the QuickBooks export is set to shorten the middle name to 5 characters.

   NOTE: To edit an employee's name in QuickBooks, double-click on the name in the Employee Center. Select "Personal Info" in the pull-down and click on the "Personal Tab". See the Edit Employee screenshot below.

2. Use Time Data to Create Paychecks.
   From the Employee Center, double-click on the employee's name.
   - Select **Payroll & Compensation** in the pull-down.



Edit Employee Screen

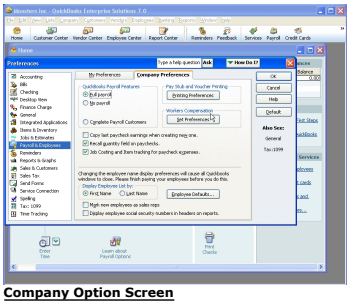
- Check the **Use Time Data to Create Paychecks** checkbox.

TIP: TimeIPS can automatically select this option for you during the integration. See "SETUP TIMEIPS step 3" for more information.

B. Setup QuickBooks Company options.

In QuickBooks, go to the Edit menu - Preferences option. Click on the Company Preferences tab.

1. Note how employee's names are listed in QuickBooks.
   Click on the Payroll & Employees icon.

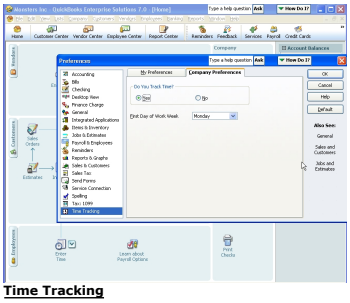


Company Option Screen

- Note whether the **Display Employee List by** is set to First Name or Last Name.

NOTE: For TimeIPS versions prior to 1.3, the "Display Employee list by" must be set to "First Name" for a successful integration. Subsequent versions allow users to define the employee name format.

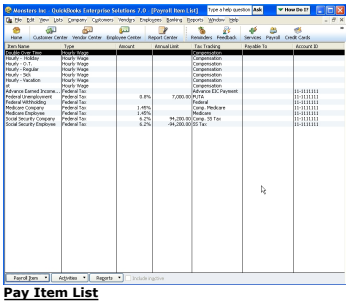
2. Turn Time Tracking on.
   Click on the Time Tracking icon.



Time Tracking

- Select **Yes** in the **Do You Track Time** radio button.

3. Setup and write down your Payroll Items.
   Go to the Lists menu - Payroll Item List.



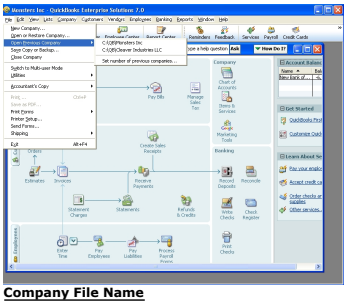
Pay Item List

- For each TimeIPS Payroll Type, setup QuickBooks payroll items for the following TimeIPS pay types: standardtime, vacation, overtime, holiday, doubletime, and sick.

NOTE: Right-click and choose New to create a new Payroll Item. You can name each pay type however you wish. You will enter the exact QuickBook Payroll Item name into TimeIPS's Export Type Settings when Setting up TimeIPS.

NOTE: For The Payroll Item List to appear under Lists menu you must activate payroll with in Quickbooks. See your Quckbooks help file for more information.

4. Determine the path of your QuickBook's Company File.
   Close down QuickBooks by going to the File menu - Close Company option, then open the Company file again.
   Go to the File menu - Open Previous Company option and write down the file path.



Company File Name

- Write down the path exactly as it is listed. You will enter this in the **QuickBooks Company File Path** when Setting up TimeIPS.

NOTE: The file name ends with ".QBW" though the extension may not display in the Open Previous Company list. You must include this extension when you enter the file name in TimeIPS.

You are now ready to Setup TimeIPS. Use the "See Also" links below to learn more.

See Also:
QuickBooks Integration - Run Payroll

QuickBooks Integration - Run Payroll

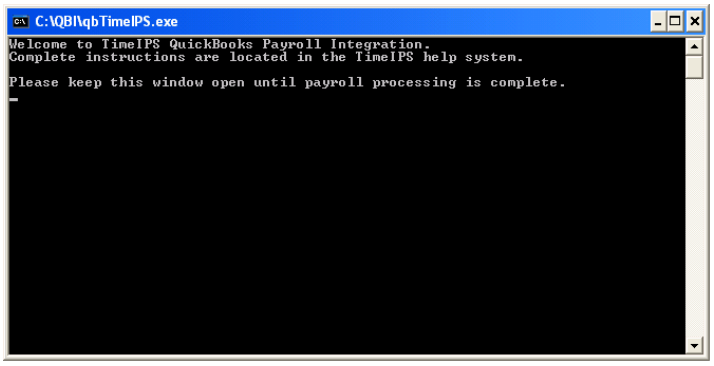
You have now setup QuickBooks and TimeIPS and are ready to run the integration.

Switch to multi-user mode in QuickBooks.

- Go to the File menu - Switch to Multi-User Mode option.

Run the qbTimeIPS.exe file.

- Double-click on the qbTimeIPS.exe file you downloaded and saved to your computer when Setting up TimeIPS.



NOTE: The qbTimeIPS.exe client must be running each time you run the payoll integration. The screen above should be open.

Run payroll in TimeIPS.

1. In the TimeIPS Payroll Export page, **Select the Employee(s)** and the **Payroll Period Ending**.

   NOTE: All Employees are selected by default. Select a group of employees by clicking on their names while holding down the CTRL key.

2. Click on the **Run Report** button.
3. If prompted, allow TimeIPS to access employee's data in QuickBooks.

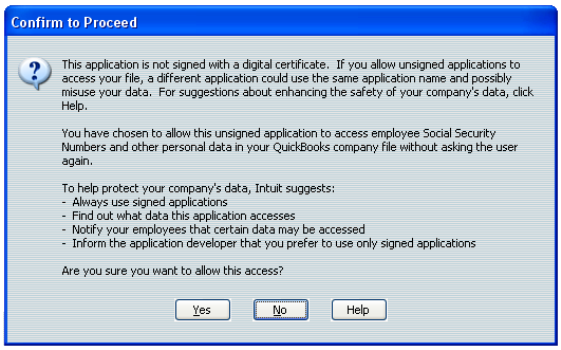
   If running the integration for the first time, the prompt below will appear.

The QuickBooks-Application with no Certificate Screen

a. Check **Allow this application to access Social Security Numbers and other personal data.**

b. Click on the **Yes, Always** button.

NOTE: TimeIPS matches TimeIPS employee records to QuickBook records by employee's names. Therefore, the TimeIPs client must have access to this personal data everytime the integration is run.

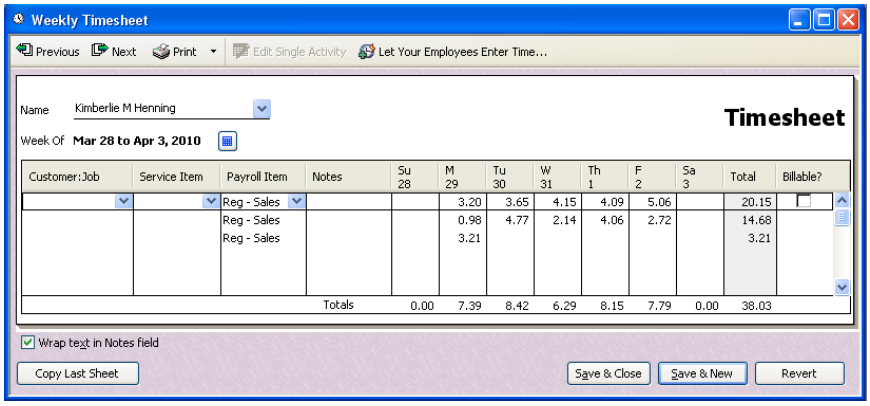


c. Confirm the access by clicking on the **Yes** button.

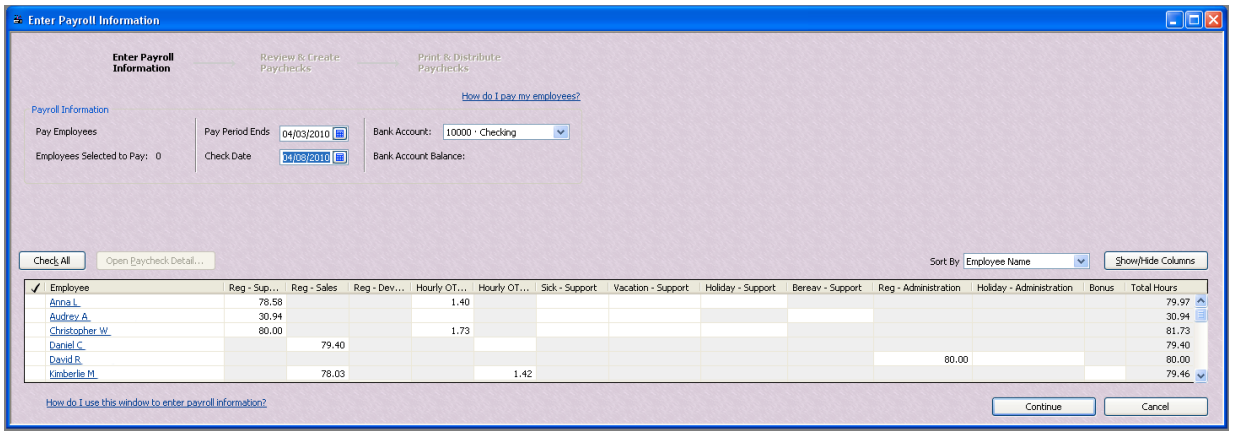
Once the integration is complete, you can successfully close down the **qbTimeIPS.exe** program by clicking on the close icon (X) in the upper right hand corner.

WARNING: Once the TimeIPS data (hours worked) is successfully integrated with QuickBooks, the payroll data will be marked as "Payrolled" in TimeIPS and can not be integrated again.

Verify hours in QuickBooks by going to Employees -> Enter Time -> Use Weekly Timesheet. Hours should appear for the employees on the dates exported, with each segment of time an employee worked showing on the day of work. Customer: Job, Service Item and Payroll Item and Note will all appear, if configured in the QuickBooks export. See example below:



When you're ready to run payroll in QuickBooks, hours will appear in Employees -> Pay Employees. Hours for each pay type will appear in a column for each employee. Final adjustments to hours or pay types can be made on individual paychecks, if necessary. See example below:



Now that you have setup QuickBooks and TimeIPS and have successfully integrated your Payroll data, you can simply Run Payroll next payroll period.

See Also:
QuickBooks Integration - Setup QuickBooks
QuickBooks Integration - Setup TimeIPS

QuickBooks Pay Item Expressions

This article explains the ability to customize the payroll items sent to QuickBooks

Purpose of Expressions

When TimeIPS exports payroll data to QuickBooks each piece of time is associated with a payroll item. This is often something like "Regular" for stanard time. With expressions you can apply custom logic when determining the payroll item.

Defining Payroll Items With Expressions

To use custom logic you must define the expression in the "Pay Type" field for that payroll item. Expressions must start with an equals sign '='. They provide a single line of code that is evaluated and returns the payroll item.

Supported Functions

QuickBooks payroll item expressions utilize the same expression parser as Custom Reports. As such the same functions are avaiable. The list of functions is available at this article.

Available Variables

The following information is available

Variable	Description
client_name_in	The name of the clock where this employee clocked in, if it exists.
client_name_out	The name of the clock where the employee clocked out if it exists
clock_in_note	The clock in note provided
clock_out_note	The clock out note
code_name	The code associated with the event, such as "standardtime" or "overtime"
payrollEventType	The type of event such as "Standardtime" or "Overtime"
customer_name	The name of any customer associated with a job
duration	The duration of the payroll event in seconds
empNum	The employee's alternate number
eventLogID	The unique database ID of the clock event pair
isHourly	1 if the employee is hourly, 0 if they are not
job_altNum	The alternate number on the job worked
job_category	The name of the category on the job worked
job_code	The code of the job worked
job_ctrlNum	The control number of the job worked
job_glNum	The G.L. number of the job worked
job_longname	The full name of the job worked
job_rate	The billing rate associated with the job worked
job_shortname	The shortened display name of the job worked
job_subCode	The subcode of the job worked
job_overrideHourlyRate	The overriding hourly rate of the job worked
job_overrideDifferential	The hourly differential of the job worked
job_overrideMultiplier	The rate multiplier of the job worked
occurs	A unix timestamp that marks the beginning of this payroll event
orgUnit	The name of the employee's Organizational Unit
pay_per_hour	The total pay per hour for the event including differentials and overtime
payRate	The hourly rate for the event including differentials but no overtime
reg_hourly_rate	The employee's normal hourly rate
base_rate	The FLSA weekly base hourly rate
SSN	The employee's social security number
lastFirstMid	The employee's name in Last First Middle format.
firstMidLast	The employee's name in First Middle Last format

userName	The employee's name in whatever format was selected in the QuickBooks preset
payroll_type_name	The name of the employee's payroll type
usersID	The unique database ID of the employee

Internal Information (visible to Administrators only):

Note: There are several additional variables available (basically anything that's in the database).

MasterBuilder Integration - Setup MasterBuilder

TimeIPS can directly transfer employees' time worked into MasterBuilder with the MasterBuilder integration feature available in the optional IPSEPI enhanced payroll integration module. The Integration should be done on the computer where MasterBuilder is installed and payroll is run. Four applications will be running during the integration: TimeIPS, MasterBuilder API, the TimeIPS MasterBuilder client, and MasterBuilder.

1-Time Setup

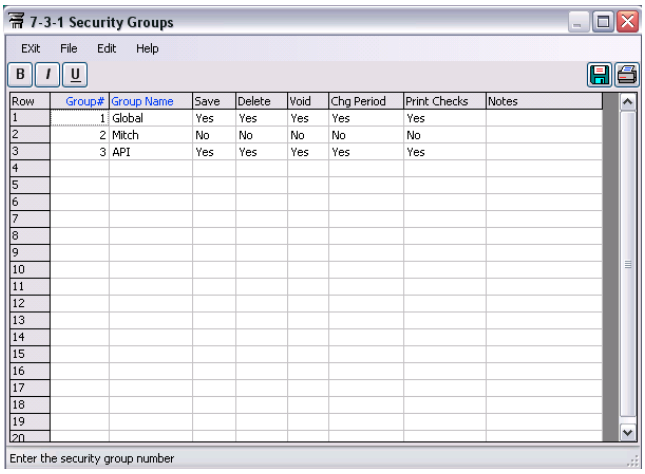
Before running the integration, you will need to:

- Configure MasterBuilder for API integration.
- Configure Payroll Export options in TimeIPS to match fields in MasterBuilder to fit the needs of your business. (Instructional article)
- Install the TimeIPS MasterBuilder Client on your computer running MasterBuilder. (Instructional article)

Configure MasterBuilder

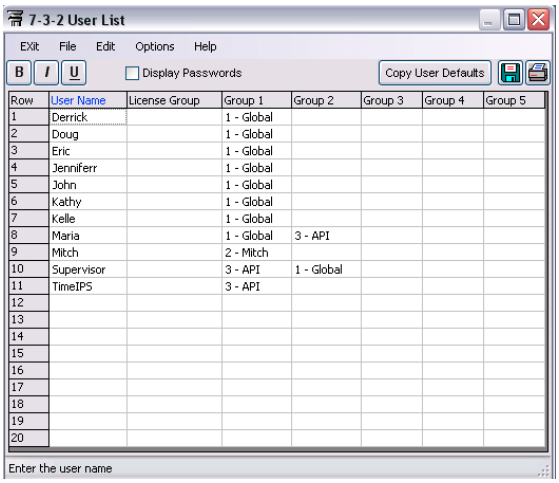
1. Open the company you want to export time to.
2. Double-click Security Groups (menu 7-3-1)
3. Type api as a new group name, give it a unique group number, and type Yes in the Save/delete field.

NOTE: You can type Yes or No in the other fields.

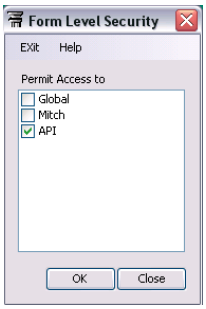


4. Choose Save from the file menu to save your changes and close the Security Group window.
5. Double-click User List (menu 7-3-2)
6. Type TimeIPS as the user name and as the password, and then select api as the Group 1 for super

NOTE: You can use a name other than "TimeIPS", that is simply the default name TimeIPS has selected.



7. Choose Save from the file menu to save your changes and close the User List window.
8. Highlight Jobs (menu 3-5) and press F7 on your keyboard. Place a checkmark next to api checkbox then press ok.



NOTE: You will need to follow this step for the following menus.

- Jobs (menu 3-5)
- Employee list (menu 5-1-1)
- Payroll check register (menu 5-1-2)
- Employees (menu 5-2-1)
- Payroll records (menu 5-2-2)
- Post payrol to GL (menu 5-2-6)
- Compensation slip (menu 5-2-7)
- Timecard Journal (menu 5-2-8)
- Daily payroll entry (menu 5-5-1)
- Daily job reports (menu 5-5-2)
- Daily labor report (menu 5-5-3)
- Daily equipment report (menu 5-5-4)
- Cost codes (menu 6-5)
- work orders (menu 11-2)

See Also:
Payroll Export - MasterBuilder Integration
Setting up MasterBuilder - MasterBuilder Integration
Setting up TimeIPS (Version 1.8.x) Master Builder Integration

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MasterBuilder Integration - Setup TimeIPS

TimeIPS can directly transfer employees' time worked into MasterBuilder with the MasterBuilder integration feature available in the optional IPSEPI enhanced payroll integration module. The Integration should be done on the computer where MasterBuilder is installed and payroll is run. Four applications will be running during the integration: TimeIPS, MasterBuilder API, the TimeIPS MasterBuilder client, and MasterBuilder.

1-Time Setup

Before running the integration, you will need to:
- Configure MasterBuilder for API integration. (Instructions found on the MasterBuilder Setup article.)
- Configure Payroll Export options in TimeIPS to match fields in MasterBuilder to fit the needs of your business.
- Install the TimeIPS MasterBuilder Client on your computer running MasterBuilder. (Instructional article)

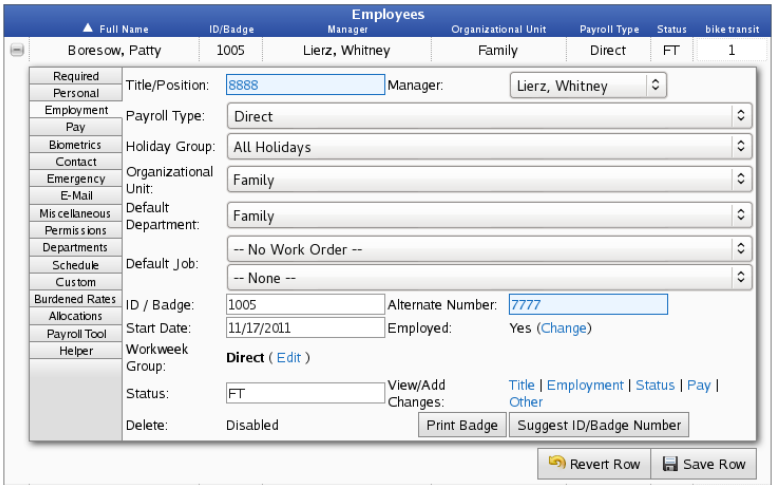
SetUp TimeIPS

Before running the Master Builder Integration for the first time, you will need to setup your TimeIPS MasterBuilder Export Settings. These settings do not need to be adjusted each time you run the Integration unless changes are made to your MasterBuilder Payroll Types or other settings.

- Add MasterBuilder Employee ID and Comp Code
- Configure Payroll Export options Preset

Add MasterBuilder Employee ID and Comp Code

Using the left pane Main Menu » Administration, go to: Employees » Employees



1. Click the plus sign in front of an employee and choose the **Employment** tab.
2. Put the **Master Builder Employee ID** in the **Alternate Number** field.

   Note:You can find your employees Master Builder Employee ID in Master Builder by going to menu 5-1-1 and run a employee list report.

3. Put the **Master Builder Comp Code** in the **Title/Position** field.

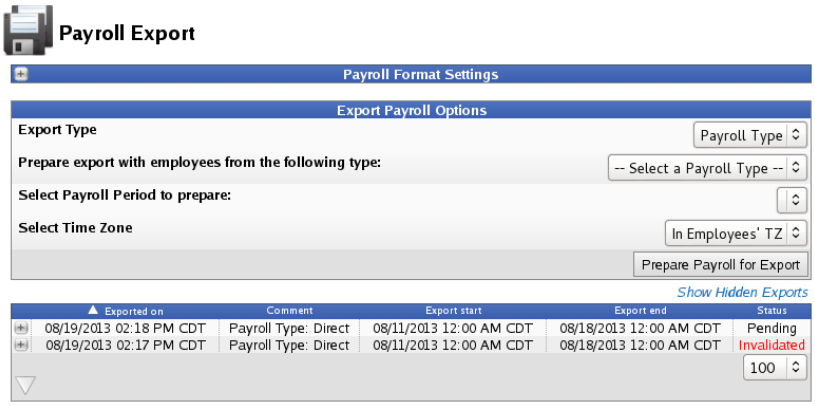
   Note:You can find your employees Master Builder comp code in Master Builder by going to menu 5-1-5 and run a workers comp report. You could also use other fields in TimeIPS to store the workers comp code such as the employee ssn field.

4. Click on the employees required tab to save.

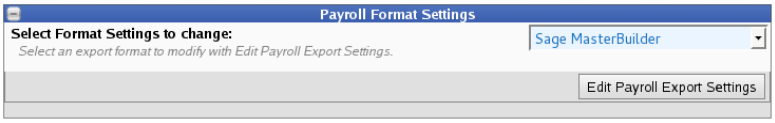
Configure Payroll Export options Preset

A MasterBuilder preset will need to be created in order to export.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Export



1. Click the **+** (plus) sign to the left of **Payroll Format Settings** bar to expand the window.



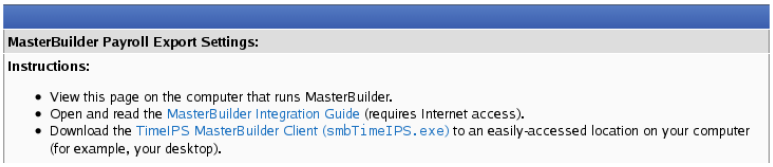
2. From the drop down box, select the **Sage MasterBuilder** file format to modify.
3. Click the **Edit Payroll Export Settings** button to bring up the editing screen.

If you have not already created a **MasterBuilder** preset, you will see the following screen.

Click the **Add Preset** button to begin setup.

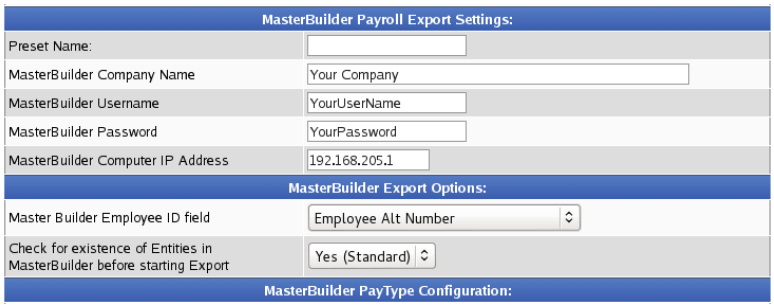
NOTE: A Preset is a set of stored settings that are used each time a payroll file is generated. If your settings change from one group of employees to another, you may create multiple presets and select the preset that applies for the group you are exporting at the time.

The preset window will appear.



If you have not yet dounloaded the **TimeIPS MasterBuilder Client**, you can do so here. Click on the **TimeIPS MasterBuilder Client (smbTimeIPS.exe)** link at the top of the page and save it to an easily-accessed location on your computer, such as your desktop. (Instructional article)

NOTE: Make sure to install the TimeIPS MasterBuilder Client on the computer running MasterBuilder. You will launch this application each time you run the payroll integration.



1. The **Preset Name** can be anything you choose. In this example we have used the name **Master Builder**
2. The **MasterBuilder File Company Name** is the name of the Company in Masterbuilder that TimeIPS will be intergrating with.
3. The **MasterBuilder Username** is the User name of the user in Masterbuilder that TimeIPS will be intergrating with.
4. The **MasterBuilder Computer IP Address** is the IP address of the computer that you are running the MasterBuilder program on and is where you will run the Integration.

Note: To Identify your Computer's IP Address
- **Ask your network administrator.**

OR
- **Go to the Start menu - Run option.**
  - **In the Open/Run window, type in the following command and press ENTER: command In the Command prompt, type in the following command and press ENTER: ipconfig**

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5. Set the **Master Builder Employee ID field** to match the field in TimeIPS that you have entered the MasterBuilder Employee ID into.
6. Set **Check for existence of Entities in MasterBuilder before starting export** to Yes.

NOTE: If this is set to yes and TimeIPS finds information that does not match in both MasterBuilders and TimeIPS it will not export until corrected.

TimeIPS Pay/Benefit Type	MasterBuilder Pay Type Code (0-9)
PayType Code for Standardtime:	1
PayType Code for Overtime:	2
PayType Code for Doubletime:	3
PayType Code for Premium Time:	9
PayType Code for Holiday:	6
PayType Code for Piecework:	9
PayType Code for Sick:	4
PayType Code for Vacation:	5

7. Set the correct code for the **MasterBuilder Pay Type** they can be 0-9.

NOTE: These are hard coded in MasterBuilder. Regular Pay-1, Overtime-2, Premium-3, Sick-4, Vacation-5, Holiday-6, Piece Work-7, Per Diem-8, and Misc-9.

MasterBuilder Job Tracking and Custom Field Values:		
Set MasterBuilder "Desc" to	Exclude from Integration	Default: TimeIPS
Set MasterBuilder "JobRef" to	Job Short Name	Default:
Set MasterBuilder "CostCodeRef" to	Exclude from Integration	Default:
Set MasterBuilder "DepartmentRef" to	Exclude from Integration	Default:
Set MasterBuilder "ServiceOrderRef" to	Exclude from Integration	Default:
Set MasterBuilder "PayGroupRef" to	Exclude from Integration	Default:
Set MasterBuilder "Memo" to	Clock In Note	Default:
Set MasterBuilder "Rate" to	Payable Hourly Rate (diff/override and OT/DT/PT)	Default:
Set MasterBuilder "PhaseRef" to	Exclude from Integration	Default:
Set MasterBuilder "WorkersCompCodeRef" to	Exclude from Integration	Default:
	Save Settings Cancel	

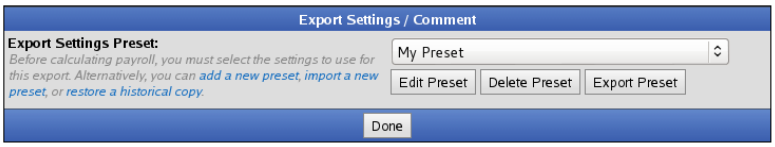
8. Setting up the "MasterBuilder Job Tracking and Custom Field".
   - Optional **Set MasterBuilder "JobRef"**. Choose which field you will us in TimeIPS to track this.
   - Optional **Set MasterBuilder "CostCodeRef"**. Choose which field you will us in TimeIPS to track this.
   - Optional **Set MasterBuilder "DepartmentRef"**. Choose which field you will us in TimeIPS to track this.
   - Optional **Set MasterBuilder "ServiceOrderRef"**. Choose which field you will us in TimeIPS to track this.
   - Optional **Set MasterBuilder "PayGroupRef"**. Choose which field you will us in TimeIPS to track this.
   - Optional **Set MasterBuilder "Memo"**. Choose which field you will us in TimeIPS to track this.
   - Required**Set MasterBuilder "Rate"**. Choose which field you will us in TimeIPS to track this.

Note: Choose Payable Hourly Rate (diff/ovrride and OT/DT/PT) to follow the FLSA.

   - Optional **Set MasterBuilder "PhaseRef"**. Choose which field you will us in TimeIPS to track this.
   - Required **Set MasterBuilder "WorkersCompCodeRef"**. Choose which field you will us in TimeIPS to track this.

Note: We recommend using the employee Title/Position field to store this number.

9. Once your preset has been configured, click on **Save Settings** to save, or **Cancel** to exit without saving.



10. On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
11. Click **Done.**

See Also:
Payroll Export MasterBuilder Integration
Setting up MasterBuilder MasterBuilder Integration
Setting up TimeIPS (Version 1.8.x) - Master Builder Integration

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MasterBuilder Integration - Install TimeIPS Masterbuilder Client

TimeIPS can directly transfer employees' time worked into MasterBuilder with the MasterBuilder integration feature available in the optional IPSEPI enhanced payroll integration module. The Integration should be done on the computer where MasterBuilder is installed and payroll is run. Four applications will be running during the integration: TimeIPS, MasterBuilder API, the TimeIPS MasterBuilder client, and MasterBuilder.

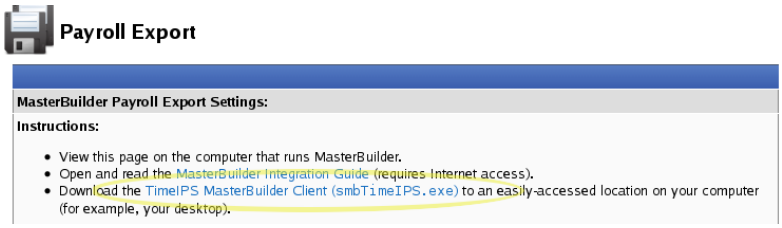
1-Time Setup

Before running the integration, you will need to:
- Configure MasterBuilder for API integration. (Instructional article)
- Configure Payroll Export options in TimeIPS to match fields in MasterBuilder to fit the needs of your business. (Instructional article)
- Install the TimeIPS MasterBuilder Client on your computer running MasterBuilder.

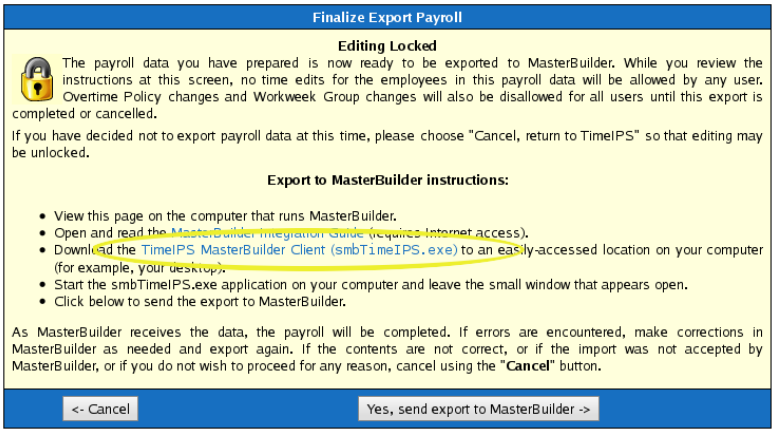
Install the TimeIPS MasterBuilder Client

The TimeIPS MasterBuilder Client link can be found in multiple places within your TimeIPS System.

- At the top of the MasterBuilder Payroll Export Settings page while creating or editing your custom preset



- and on the final page when exporting payroll.



1. Click on the **TimeIPS MasterBuilder Client (smbTimeIPS.exe)** link on one of these pages or from this very sentence.

2. The link will take you to the following page: **TimeIPS -- Downloads**. Find the **TimeIPS to Sage Master Builder Integration** section.

TimeIPS -- Downloads

Downloads [ ] Search

[Main download area | Add download | New | Popular | Top-rated]

Category: TimeIPS Utilities

Sort downloads by: Title (+ | -) Date (+ | -) Rating (+ | -) Popularity (+ | -)
Resources currently sorted by:Title (A to Z)

TimeIPS QuickBooks qbTimeIPS.exe
Description: QuickBooks Payroll Integration Client Applet supporting standard push mode and new pull mode for TimeIPS 1.11 and later, ideal for networks where TimeIPS cannot directly communicate with the computer running QuickBooks.
Version: 2012 | File size: 384.00 Kb
Added on: 20-Sep-2012 | Downloads: 233
Home page | Rate resource | Details

BAR-USB-ZB Programming Options
Description: Optional programming for BAR-USB-ZB barcode scanners: Activate Codabar and Change Code 128 to notes mode. Codabar is useful in situations where a clock note needs to be scanned, as codabar can encode the required "++" characters after the note. Requires barcode software capable of producing codabar without checksum. Code 128 in Notes mode removes the automatic "*" suffix so it can be used for notes (notes must end in ++) and jobs/work orders (Work Order PDF in 128 Note mode includes the required * suffix).
Version: 1.0 | File size: 16.83 Kb
Added on: 17-Aug-2009 | Downloads: 247
Home page | Rate resource | Details

BIO-OPT-USB desktop widget
Description: Desktop widget for use with the BIO-OPT-USB reader on Windows XP. ***** Please contact TimeIPS Support this download. *****
Version: 1.0 | File size: 0 bytes
Added on: 19-Jan-2012 | Downloads: 110
Home page | Rate resource | Details

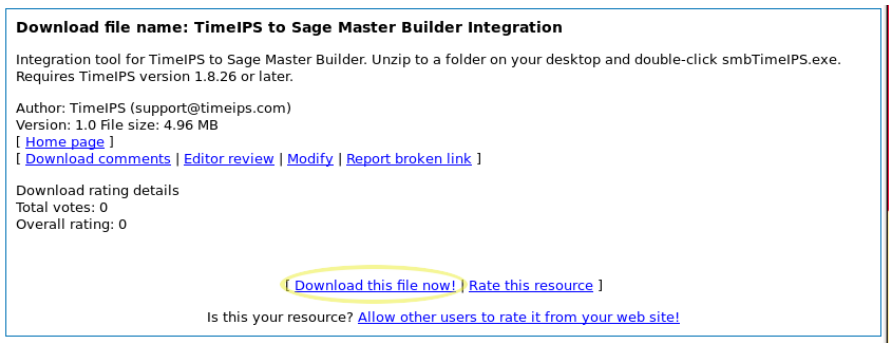
Mozilla Firefox
Description: A free web browser supported by TimeIPS.
Version: | File size: 0 bytes
Added on: 25-Aug-2005 | Downloads: 319
Home page | Rate resource | Details

Sample Site Summary Template - Complex
Description: A more complicated example template for the Site Summary Report using a "Minimum employee rows:" val of 18. For use with Site Summary report.
Version: 1.0 | File size: 23.35 Kb
Added on: 07-Dec-2008 | Downloads: 406
Home page | Rate resource | Details

Sample Site Summary Template - Simple
Description: Sample template for use with Site Summary report
Version: 1.0 | File size: 7.50 Kb
Added on: 31-Dec-2007 | Downloads: 504
Home page | Rate resource | Details

TimeIPS to Sage Master Builder Integration
Description: Integration tool for TimeIPS to Sage Master Builder. Unzip to a folder on your desktop and double-click smbTimeIPS.exe. Requires TimeIPS version 1.8.26 or later.
Version: 1.0 | File size: 4.96 MB
Added on: 13-Jul-2010 | Downloads: 223
Home page | Rate resource | Details

3. Click on **Details**.



Download file name: TimeIPS to Sage Master Builder Integration

Integration tool for TimeIPS to Sage Master Builder. Unzip to a folder on your desktop and double-click smbTimeIPS.exe. Requires TimeIPS version 1.8.26 or later.

Author: TimeIPS (support@timeips.com)
Version: 1.0 File size: 4.96 MB
[Home page]
[Download comments | Editor review | Modify | Report broken link]

Download rating details
Total votes: 0
Overall rating: 0

[Download this file now! | Rate this resource]

Is this your resource? Allow other users to rate it from your web site!

4. Click on **Download this file now!**

5. Open the **zip file** and choose to **extract** the contents.

6. **Save** to an easily accessed location on your computer (such as you desktop).

NOTE: The TimeIPS MasterBuilder Client will need to be launch each time you export payroll.

See Also:
MasterBuilder Integration - Setup MasterBuilder
MasterBuilder Integration - Setup TimeIPS
MasterBuilder Integration - Payroll Export

MasterBuilder Integration - Payroll Export

TimeIPS can directly transfer employees' time worked into MasterBuilder with the MasterBuilder integration feature available in the optional IPSEPI enhanced payroll integration module. The Integration should be done on the computer where MasterBuilder is installed and payroll is run. Four applications will be running during the integration: TimeIPS, MasterBuilder API, the TimeIPS MasterBuilder client, and MasterBuilder.

1-Time Setup

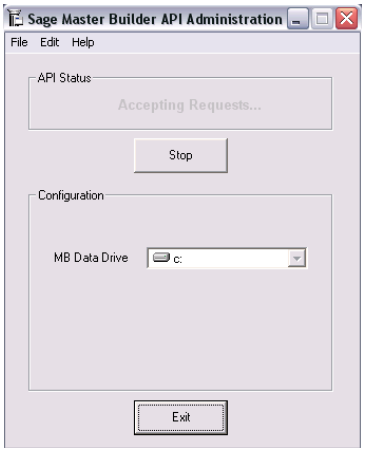
Before running the integration, you will need to:
- Configure MasterBuilder for API integration. (Instructional article)
- Configure Payroll Export options in TimeIPS to match fields in MasterBuilder to fit the needs of your business. (Instructional article)
- Install the TimeIPS MasterBuilder Client on your computer running MasterBuilder. (Instructional article)

Run Payroll Integration

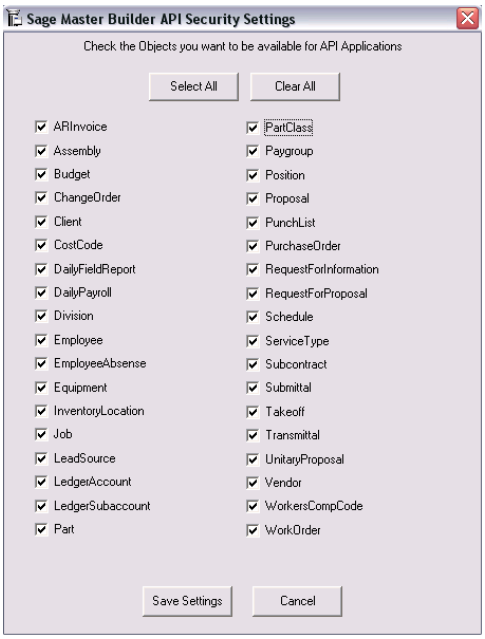
- Open MasterBuilder
- Launch MasterBuilder API
- Launch the TimeIPS MasterBuilder Client on your computer running MasterBuilder.
- Prepare and Export Payroll from TimeIPS

Launch MasterBuilder API

1. Open the Company you want to export time to in MasterBuilder.



2. Open the MasterBuilder API. In windows go to: Start » All Programs » Sage MasterBuilder » Sage MasterBuilder API.
3. Make sure you choose the correct drive Sage Master Builders is on.



4. click the start button.
5. Choose edit at the top of the Sage Master Builder API and choose security.
6. Make sure everything is checked.

Note: You will only need to make sure the security settings are correct the first time you do the integration.

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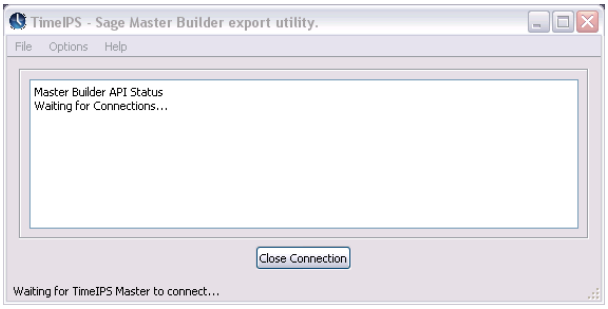
7. Close the security screen. You will need to leave the Sage Master Builder API running while you run the integration.



8. Launch the TimeIPS master builder api. Leave this running during the export.

Note: Downloading this program was a step during the configuration of TimeIPS for MasterBuilder.

Prepare Payroll for Export

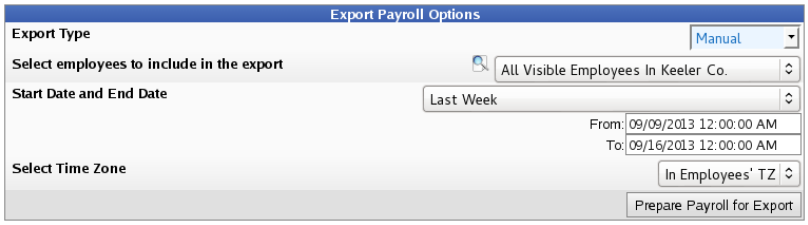
First, choose to generate the report by **Payroll Type** or **Manual**ly select employees and a range of time.

Payroll Type

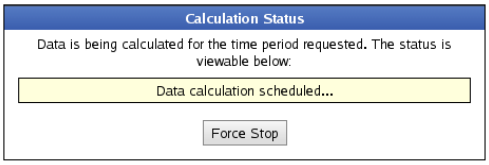
1. Under **Export Type,** select **Payroll Type** to generate the report. (See "Manual" below for specifics on that option.)
2. Select a **Payroll Type**. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
3. Select the **Payroll Period** from the drop-down boxes.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.

Manual

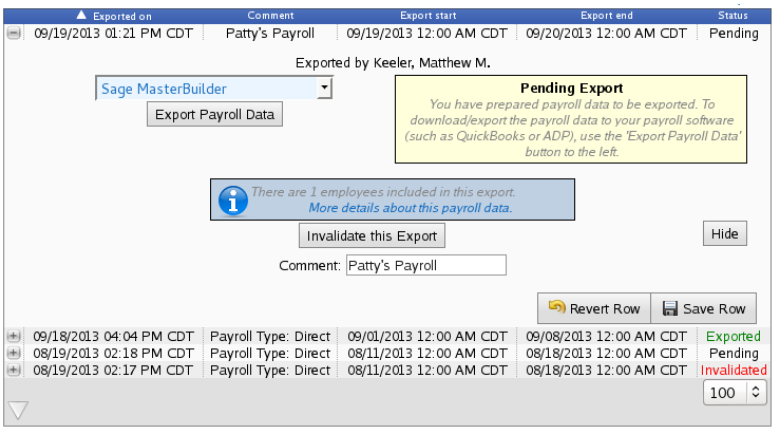
1. Under **Export Type,** select **Manual** to generate the report. (See "Payroll Type" above for specifics on that option.)
2. Select an employee or group of **employees** to include in the export.
3. Manually select a range of time for this report, or use the quick selection drop down box.
4. Select a **Time Zone**. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
5. Click the **Prepare Payroll for Export** button.



Next you should see the payroll calculation being scheduled.



Export Payroll



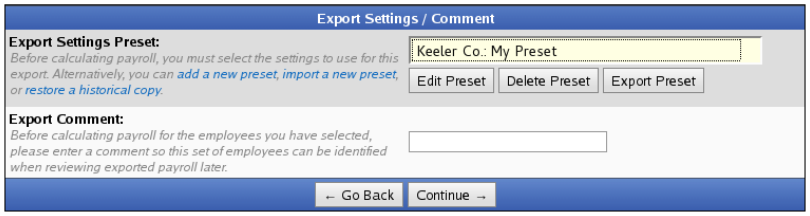
After the payroll data is prepared for export, the Pending Export window will open.

1. Select **Sage MasterBuilder** from the drop down menu. The Manual payroll export offers a basic comma separated values file that can be opened in a spreadsheet program such as Open Office Calc or Microsoft Excel.
2. Next click on the button labeled **Export Payroll Data.**

NOTE:: Editing of time events is locked during payroll processing to avoid having another user make changes via the Time/Edit Report that would not be reflected properly in the current payroll run.

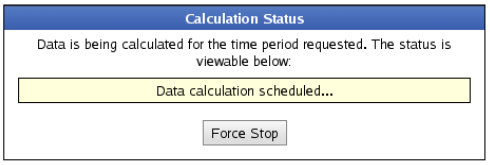
If you have not already created a **MasterBuilder** preset, you will see the following screen.

Follow the instructions laid out in the Configure Payroll Export options Preset section of the MasterBuilder Integration - TimeIPS Setup article.

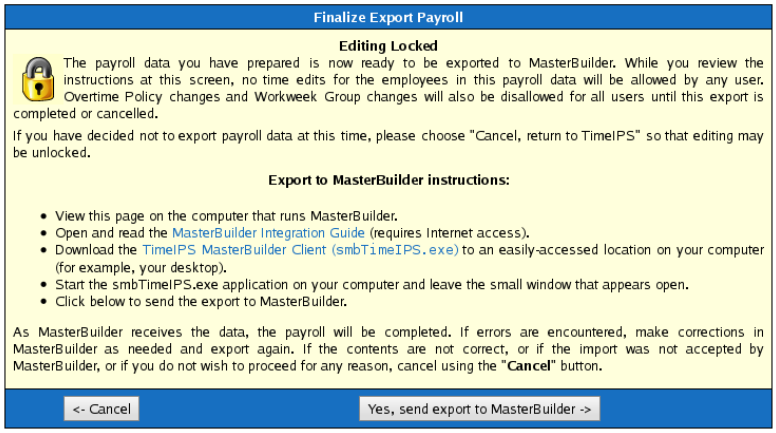


- On the next screen be sure that your new preset is the one selected in the **Export Settings Preset** drop down menu.
  - Optionally, you can add a comment to the export making it unique and easily identifiable.
- Click **Continue.**

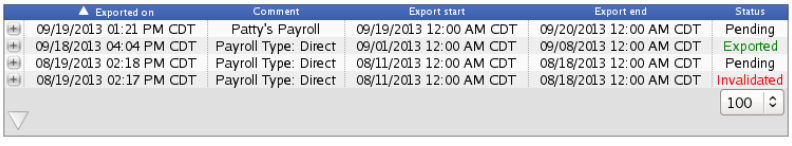
Next you should see the payroll calculation being scheduled.



Payroll Export Data - Final Step



- If you are confident that the information contained in this export is correct and wish to permanently lock the payroll period, click the button labeled **Yes, send export to MasterBuilder** otherwise choose **Cancel**. Locking the payroll period prevents future modifications of any kind.
  NOTE: If you choose **"Cancel",** the export will be listed as "Pending" and futher changes can be made to the data. Pending exports can be exported again to other payroll output formats as often as you like until they have been accepted/locked.
  If you choose **"Yes, send export to MasterBuilder",** the payroll status will show **"**Exported**".** Exported payroll runs are locked and time can no longer be edited in the system for that period of time.



Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
09/18/2013 04:04 PM CDT	Payroll Type: Direct	09/01/2013 12:00 AM CDT	09/08/2013 12:00 AM CDT	Exported
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Pending
08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated

100

See Also:
Setting up MasterBuilder MasterBuilder Integration
Setting up TimeIPS (Version 1.8.x) Master Builder Integration
Payroll Export - MasterBuilder Integration
MasterBuilder Integration - Install TimeIPS Masterbuilder Client

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Timesheet Approvals

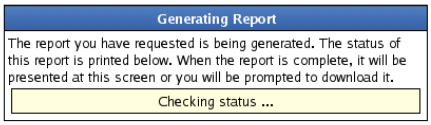
There are two areas where timesheets are approved.

- For Employees, Timesheet approvals are carried out in My Timesheets.
- For Managers, Timesheet approvals are carried out in Payroll > Timesheet Approvals.

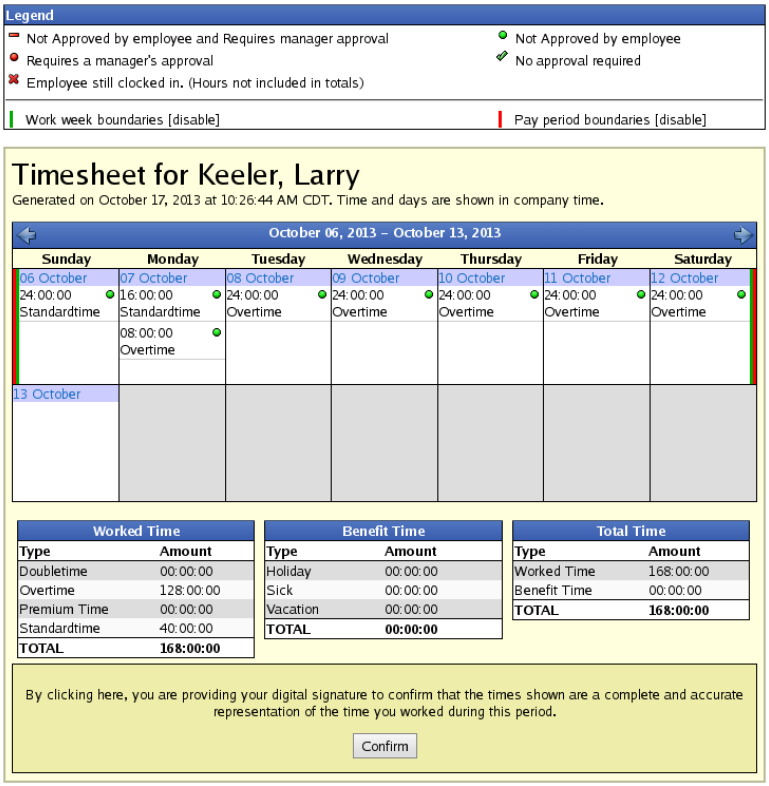
Employee Timesheet Approvals

Using the left pane Main Menu » My TimeIPS, go to: My Timesheet

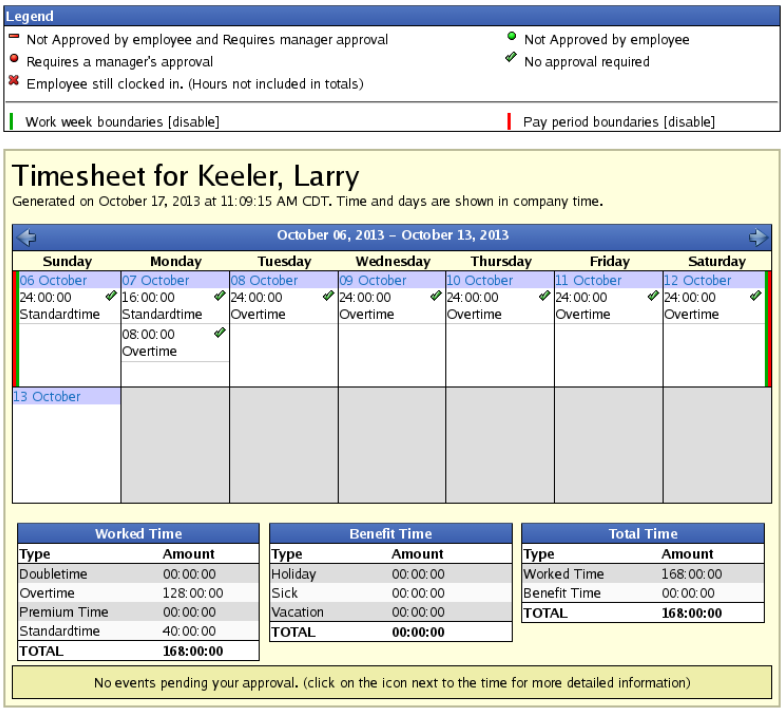
My Timesheet



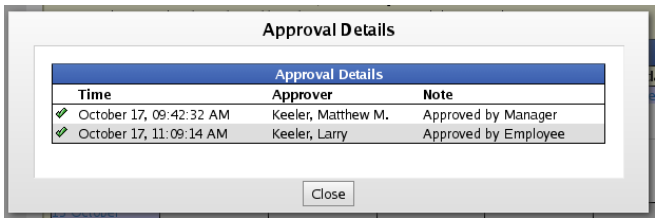
The **My Timesheet** allows you to view your current pay period for discrepancies.



If there are no discrepancies, click the **Confirm** button to submit your approval.

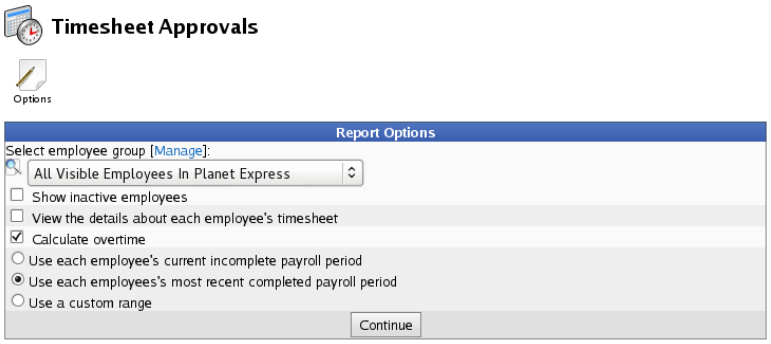


The **Legend** shows that the green checkmark means there is "No approval required". Click this (or any) icon next to the time for more detailed information.



Timesheet Approvals for Managers

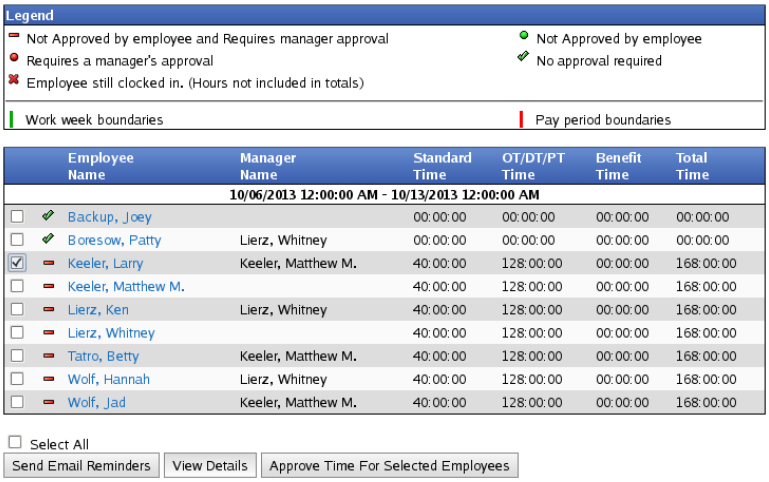
Using the left pane Main Menu » Administration, go to: Payroll » Timesheet Approvals



This will bring up the **Report Options** window where managers can configure the report using the following criteria.

- **All Visible Employees**: Will allow the manager to either select all of the employees in the company, groups of employees, or individual employees to be reviewed.
- **Show Inactive employees** will include in the report all of the terminated or inactive employee(s) in the Timesheet Approval report.
- To **View the details about each employee's timesheet**, check the box next to it.
- By default, the report will **Calculate overtime** unless you uncheck the box.
- **Use each employee's current incomplete payroll period**. You will use this option if you need to view an employee(s) time sheet for the current pay period
- **Use each employees most recent payroll period** is the default option that most managers will use. This will bring up all of the punches the employee has made in a previous pay period such as the last two weeks.
- Choosing to **Use a Custom Range** will provide the option to specify a starting and ending date range which will limit the events displayed.

Click on the **Continue** button to view the report.



Legend

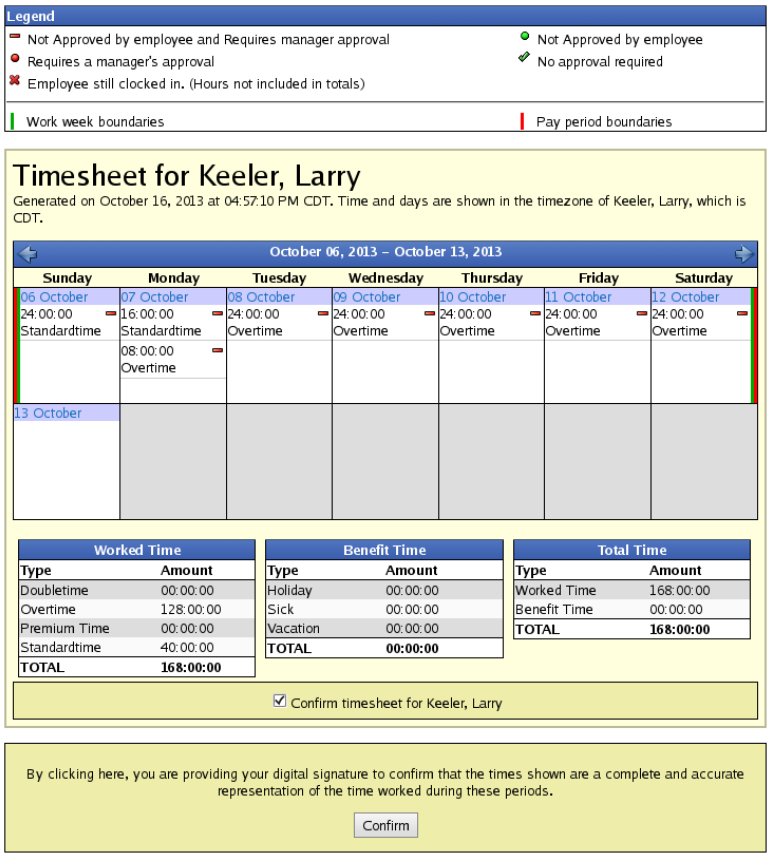
- Not Approved by employee and Requires manager approval
- Requires a manager's approval
- Employee still clocked in. (Hours not included in totals)
- Not Approved by employee
- No approval required
- Work week boundaries
- Pay period boundaries

		Employee Name	Manager Name	Standard Time	OT/DT/PT Time	Benefit Time	Total Time
10/06/2013 12:00:00 AM - 10/13/2013 12:00:00 AM							
☐	✓	Backup, Joey		00:00:00	00:00:00	00:00:00	00:00:00
☐	✓	Boresow, Patty	Lierz, Whitney	00:00:00	00:00:00	00:00:00	00:00:00
☑	–	Keeler, Larry	Keeler, Matthew M.	40:00:00	128:00:00	00:00:00	168:00:00
☐	–	Keeler, Matthew M.		40:00:00	128:00:00	00:00:00	168:00:00
☐	–	Lierz, Ken	Lierz, Whitney	40:00:00	128:00:00	00:00:00	168:00:00
☐	–	Lierz, Whitney		40:00:00	128:00:00	00:00:00	168:00:00
☐	–	Tatro, Betty	Keeler, Matthew M.	40:00:00	128:00:00	00:00:00	168:00:00
☐	–	Wolf, Hannah	Lierz, Whitney	40:00:00	128:00:00	00:00:00	168:00:00
☐	–	Wolf, Jad	Keeler, Matthew M.	40:00:00	128:00:00	00:00:00	168:00:00

☐ Select All

Send Email Reminders | View Details | Approve Time For Selected Employees

For a more detailed view, check the box next to the employee's name and click the **View Details** button.



Legend

- Not Approved by employee and Requires manager approval
- Requires a manager's approval
- Employee still clocked in. (Hours not included in totals)
- Not Approved by employee
- No approval required
- Work week boundaries
- Pay period boundaries

Timesheet for Keeler, Larry

Generated on October 16, 2013 at 04:57:10 PM CDT. Time and days are shown in the timezone of Keeler, Larry, which is CDT.

October 06, 2013 – October 13, 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
06 October 24:00:00 Standardtime	07 October 16:00:00 Standardtime 08:00:00 Overtime	08 October 24:00:00 Overtime	09 October 24:00:00 Overtime	10 October 24:00:00 Overtime	11 October 24:00:00 Overtime	12 October 24:00:00 Overtime
13 October						

Worked Time	
Type	Amount
Doubletime	00:00:00
Overtime	128:00:00
Premium Time	00:00:00
Standardtime	40:00:00
TOTAL	**168:00:00**

Benefit Time	
Type	Amount
Holiday	00:00:00
Sick	00:00:00
Vacation	00:00:00
TOTAL	**00:00:00**

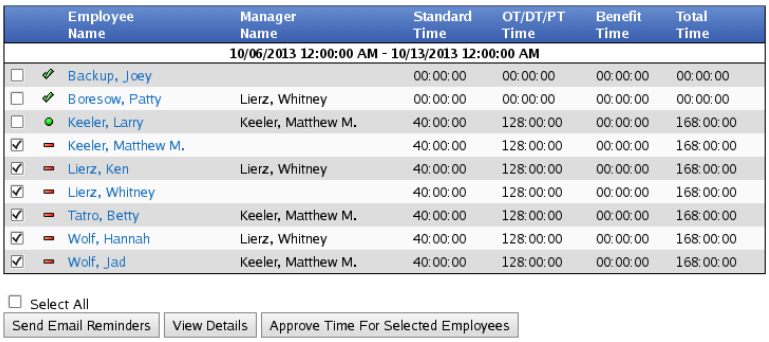
Total Time	
Type	Amount
Worked Time	168:00:00
Benefit Time	00:00:00
TOTAL	**168:00:00**

☑ Confirm timesheet for Keeler, Larry

By clicking here, you are providing your digital signature to confirm that the times shown are a complete and accurate representation of the time worked during these periods.

Confirm

After reviewing the employees timesheet for descrepancies and none are found, place a check mark in the box next to **Confirm timesheet for 'employee name'**, then click the **Confirm** button.



	Employee Name	Manager Name	Standard Time	OT/DT/PT Time	Benefit Time	Total Time
	10/06/2013 12:00:00 AM - 10/13/2013 12:00:00 AM					
☐	Backup, Joey		00:00:00	00:00:00	00:00:00	00:00:00
☐	Boresow, Patty	Lierz, Whitney	00:00:00	00:00:00	00:00:00	00:00:00
☐	Keeler, Larry	Keeler, Matthew M.	40:00:00	128:00:00	00:00:00	168:00:00
☑	Keeler, Matthew M.		40:00:00	128:00:00	00:00:00	168:00:00
☑	Lierz, Ken	Lierz, Whitney	40:00:00	128:00:00	00:00:00	168:00:00
☑	Lierz, Whitney		40:00:00	128:00:00	00:00:00	168:00:00
☑	Tatro, Betty	Keeler, Matthew M.	40:00:00	128:00:00	00:00:00	168:00:00
☑	Wolf, Hannah	Lierz, Whitney	40:00:00	128:00:00	00:00:00	168:00:00
☑	Wolf, Jad	Keeler, Matthew M.	40:00:00	128:00:00	00:00:00	168:00:00

Select All

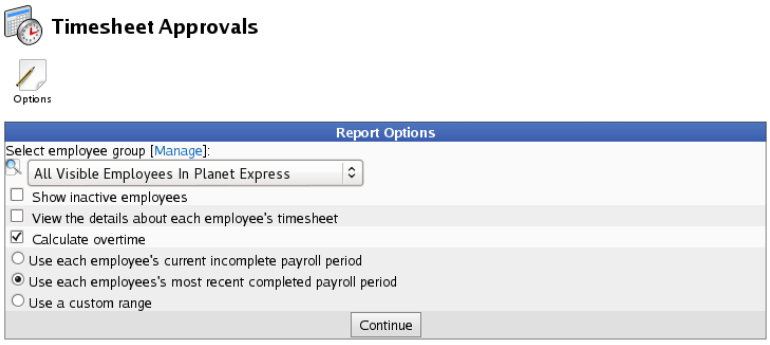
Send Email Reminders | View Details | Approve Time For Selected Employees

- You can also view and/or approve multiple employees at once by placing checkmarks in front of each of their names.
- To view a more detailed list of everyone's time at once, check the **Select All** box and click on the **View Details** button.
- To approve everyone at once, check the **Select All** box and click on the **Approve Time For Selected Employees** button.

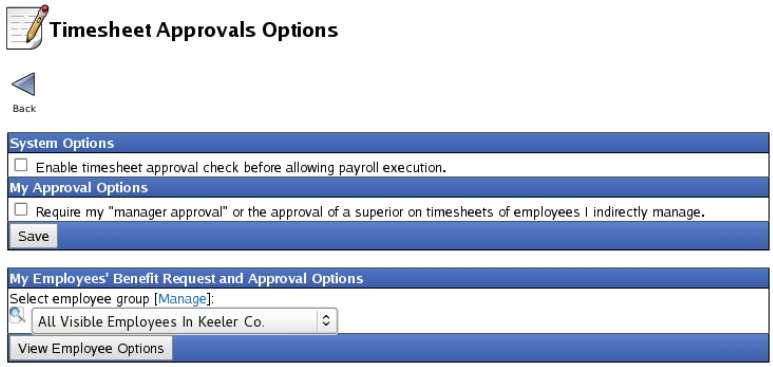
NOTE: Clicking the "Approve Time For Selected Employees" button approves time without first viewing the details.

Timesheet Approval Options

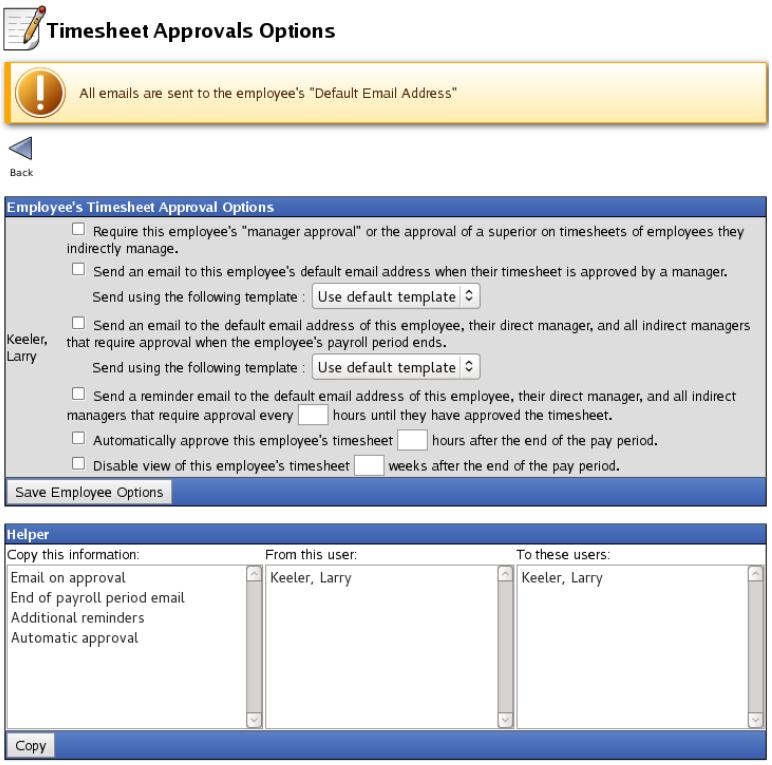
Using the left pane Main Menu » Administration, click on: Payroll » Timesheet Approvals



- To adjust your timesheet approval options, click on the **Options** icon at the top of the page.



- Here you can view and set options to require approval before payroll execution (payroll admin priveleges required), and to require your approval on timesheets for employees who you manage.
- To edit employee options for employees you manage, select the employee from the drop down menu and click on the **View Employee Options** button.



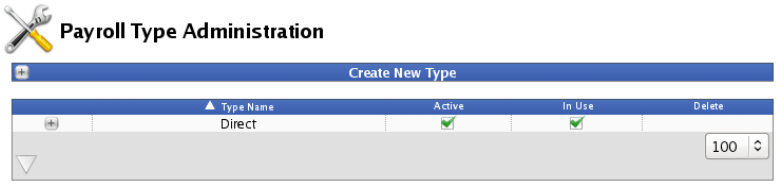
- Here you can require employee timesheet approvals, set up notification emails and reminders for appoved or yet to be approved timesheets as well as set automatic approvals after a specified time interval.
- The Helper section makes it easy to copy settings from one individual to another or a group of individuals.

NOTE: Email notifications are sent to the email address marked as "Default" located on the employees "Email" tab of the Employee Administration page.

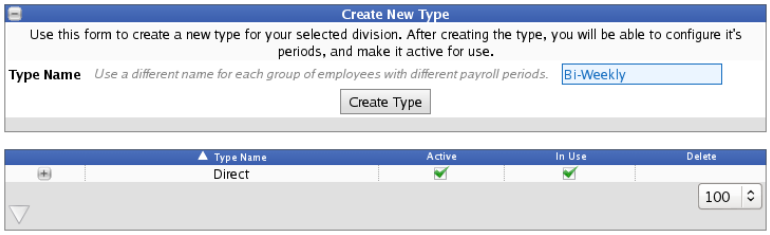
Payroll Types

TimeIPS uses Payroll Types to group employees with the same payroll period. Payroll will be run once for each Type. Time Reports and Special Reports may be viewed by Type.

Using the left pane Main Menu » Administration, click on: Payroll » Payroll Types



To Add a Payroll Type



1. Click the **+** (plus) sign to the left of the **Create New Type** bar.

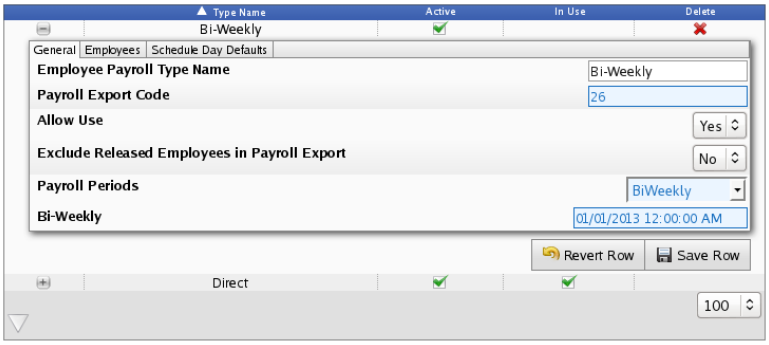
NOTE: By default, all employees entered in the initial TimeIPS Setup are put under the Payroll Type of "Direct". If the majority of your employees should be in one type, you can leave the type as Direct or edit the name to a more descriptive label for your company.

2. Add a descriptive name that is different for each group of employees with different payroll periods.
3. Click the **Create Type** button to save.

To Edit a Payroll Type

1. Select the **Payroll Type** by clicking the **+** (plus) sign next to the name.
2. Adjust the information as necessary under the **General**, **Employees**, and **Schedule Day Defaults** tabs.

General



- From the **General** tab, you can change the **Employee Payroll Type Name**. Use a different name for each group of employees with different pay period requirements. For example, Direct, Contract, Hourly, Salary, Office, or Warehouse.
- Add a **Payroll Export Code.** A payroll code that is unique to this payroll type which can be included in payroll exports.
- **Allow Use** is set to "Yes" by default which allows employees of this type to be created.

NOTE: You cannot disable any type that is in use by an employee. You must assign the employee(s) to a different payroll type first.

- **Exclude Released Employees in Payroll Export** is set to "No" by default.

IMPORTANT: This should almost always be set to "No". Setting to yes will exclude released employees from payroll export which can cause employees not to receive their last pay check.

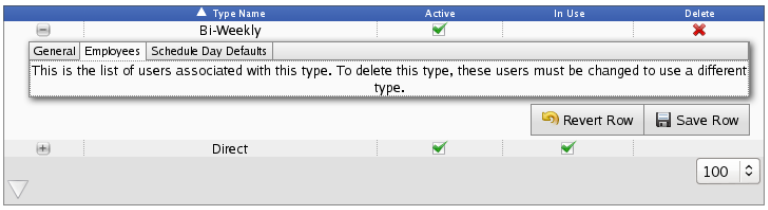
- **Payroll periods** are in the timezone of the Company/Division. Choose the length or pattern of this groups pay period. Weekly is every week. Biweekly is every other week. Semimonthly is twice a month. Four-Four-Five is every 4 weeks, 4 weeks, 5 weeks then repeats.
- Choose the **Weekday** and time the period ends/begins. Click in the box on the day or time you wish to change, then use the Up/Down keyboard arrow keys to scroll to the correct day and time.

NOTE: Payroll periods are done in the timezone of the Company/Division as set in the System Administration -> Company/Divisions page.

TIP: Payroll Periods technically begin and end within the same second. Therefore, the start and end payroll period is the same. TimeIPS pays through the end of the second so the second is not duplicated in payrolls.

- Click on the **Save Row** button to save the changes.

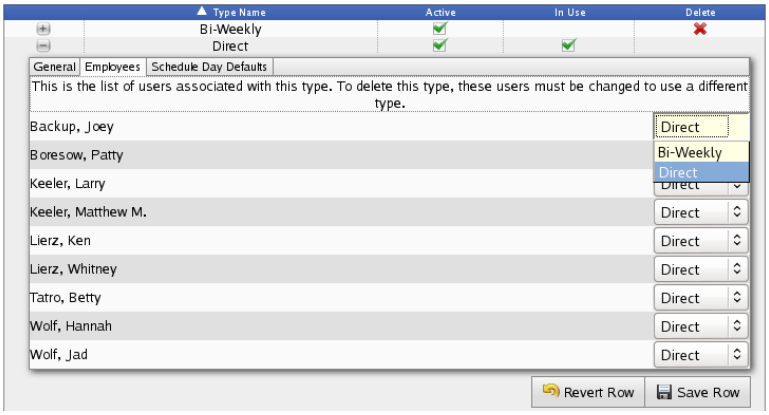
Employees



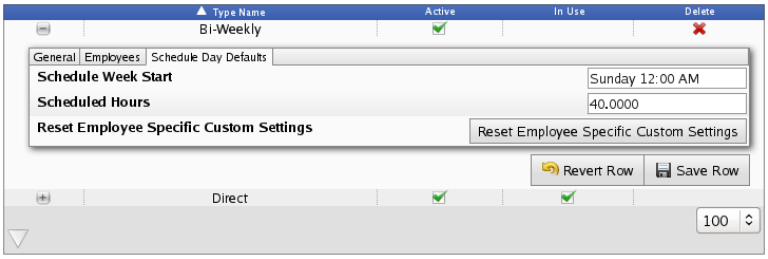
- This is the list of users associated with this type.

NOTE: To delete this type, these users must be changed to use a different type. In the example above, there are no employees listed and therefore a red X appears in the DELETE column, allowing for the deletion of this pay type.

- To assign employees to a different type, go to the Employees tab of their current payroll type. Click on the drop down menu and select the correct type. Or, use the "Employee Administration" page to edit individual employee's payroll types.



Schedule Day Defaults



- **Schedule Day Defaults** allow employees in the payroll type to share the same start time and day, as well as hours in the week.
- Employees can have override settings configured in the employee administration area.

3. Click on the **Save Row** button to save the changes.

Overtime Policies

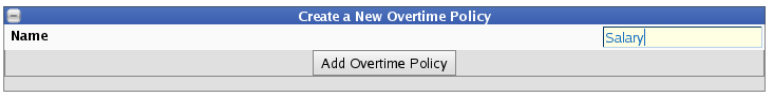
Overtime Policies define how overtime is calculated for workweeks. These policies stand alone and do not, by themselves, determine how overtime is calculated for any one employee. Instead, you must link Overtime Policies to Workweek Groups.

NOTE: If you have upgraded your TimeIPS system, you may notice that you have Overtime Policies named after individual employees. These employees had custom legacy rules that were upgraded.

Using the left pane Main Menu » Administration, click on: Payroll » Overtime Policies

Create a New Overtime Policy

- Click on the **+** (plus) sign to the left of the **Create a New Overtime Policy** bar.

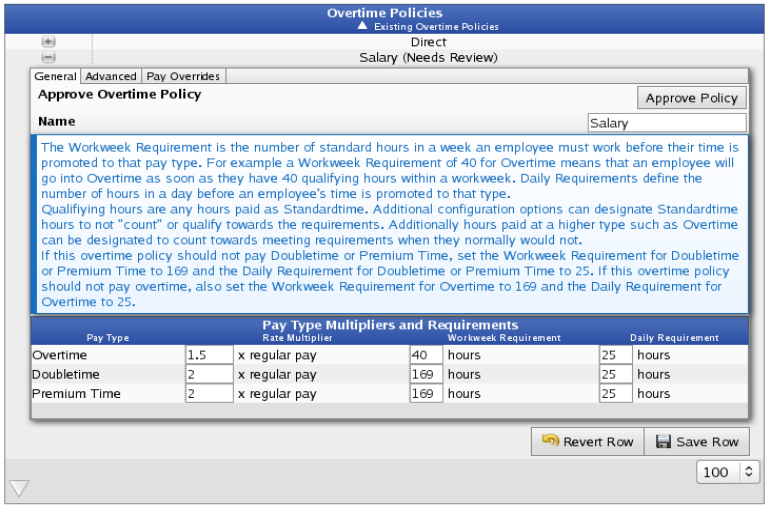


- Type the new overtime policy **Name**.
- Click on the **Add Overtime Policy** button.
- The new overtime policy will be created and added to the list of **Existing Overtime Policies** below.

Edit Existing Overtime Policies

1. Select the **Overtime Policy** by clicking the **+** (plus) sign next to the name.
2. Adjust the information as necessary under the **General**, **Advanced**, and **Pay Overrides** tabs.

General



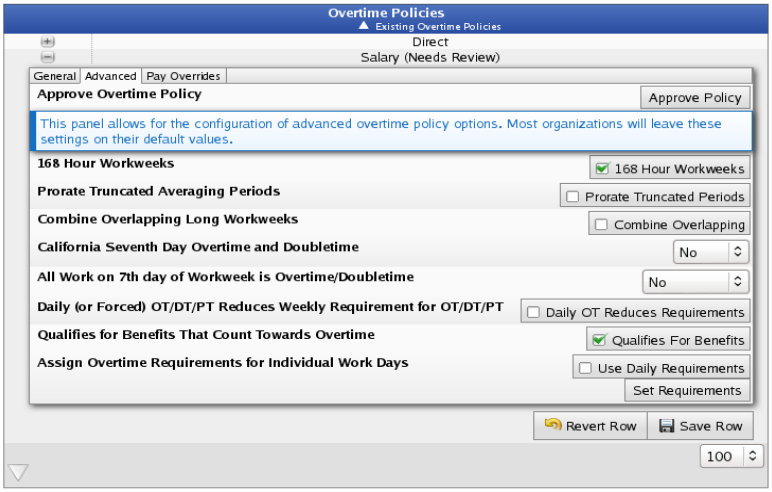
- **Approve Overtime Policy:** You can approve these overtime policy settings by making changes or if the current settings are correct, using the **Approve Policy** button. NOTE: Payroll exports will give a warning if these settings are used in an export and have not been approved.
- The **Name** is used to identify this overtime policy on the workweek groups page. You can change it here. Use a different name for each group of employees with different overtime requirements. For example, Direct, Contract, Hourly, Salary, Office, or Warehouse.

- **NOTE: The above settings are the default settings for all new overtime policies. Based on your company's needs, you can modify these settings using the following options.**

- Modify the **Rate Multiplier**, **Workweek Requirement**, and **Daily Requirement** for Overtime, Doubletime, and Premium Time as needed.
  - The **Workweek Requirement** is the number of standard hours in a week an employee must work before their time is promoted to that pay type. For example a Workweek Requirement of 40 for Overtime means that an employee will go into Overtime as soon as they have 40 qualifying hours within a workweek.
  - **Daily Requirement**s define the number of hours in a day before an employee's time is promoted to that type.

TIP: If this overtime policy should not pay Doubletime or Premium Time, set the Workweek Requirement for Doubletime or Premium Time to 169 and the Daily Requirement for Doubletime or Premium Time to 25. If this overtime policy should not pay overtime, also set the Workweek Requirement for Overtime to 169 and the Daily Requirement for Overtime to 25.

Advanced



- Choose your option for **168 Hour Workweeks**. If this option is checked, workweeks will be considered to be recurring periods of 168 hours, without exception. If this option is unchecked, workweeks may vary in length to accommodate DST changes (if DST is in use/effect).
- Most company's overtime is based on hours worked in one week and/or in one day. If your company calculates overtime based on time worked in two-to-four weeks, set the following options as applicable:
  - Choose whether you want to **Prorate Truncated Averaging Periods**. If this option is checked, in the event that workweeks of more than one calendar week overlap due to changes in Workweek Group settings the first overlapping workweek will have its overtime (and doubletime) calculated based on prorated overtime rules. If unchecked, overtime in overlapping workweeks of more than one calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of Jun 30, 2000.
  - Choose whether to **Combine Overlapping Long Workweeks**. If workweeks of more than one calendar week in length overlap but are the same length, some companies treat the overlapping workweeks as one workweek for overtime and doubletime calculation purposes. To enable this behavior, check the box. Most organizations will prefer to leave it unchecked to disable this behavior.

- If applicable, choose your option for **California Seventh Day Overtime and Doubletime**.
  - Treat work done in the "first eight hours worked on the seventh day of work in any one workweeks" as overtime and "any work in excess of eight hours on any seventh day of a workweek as doubletime" in accordance with California Labor Code (Section 510 (a)) by selecting **Yes (1)**.
  - Choose **Yes (2)** if you are a California company that chooses to follow the interpretation of Section 510(a) as follows: "the [Labor Commissioner] has indicated in its enforcement policy that it intends to follow the historical rule and require the premium only if an employee works all seven days in the workweek." As explained by the author earlier in the footnote, "[t]he seventh-day premium has historically applied only if an employee worked on each of the days in the workweek, not simply on the seventh day. If A.B. 60 were construed otherwise, it would result in the illogical conclusion that overtime premiums would be owed for a single day of work if that work occurred on the last day of the workweek."
  - Some employers choose to pay doubletime for any work on the seventh CONSECUTIVE day of work in a work week; select **Yes (3)** to pay this way.
  - If Section 510(a) of California's Labor Code does not apply to employees following this Overtime Policy, select **No.**
- Choose whether **All Work on** the **7th day of** a **Workweek is Overtime/Doubletime**. Some companies treat all time worked on the 7th day of a workweek as overtime or doubletime regardless, with no change after eight hours. If this is the desired behavior for employees following this Overtime Policy choose "Overtime" or "Doubletime" otherwise, choose "No."
- Choose whether **Daily (or Forced) OT/DT/PT Reduces Weekly Requirement for OT/DT/PT**: If checked, when employees receive OT/DT/PT due to daily requirements or forced overrides, the weekly hours required to reach OT/DT/PT should be reduced as well.

For example, an employee works 40 hours in a week with 8 hours promoted to OT due to exceeding daily requirements. With this option unchecked the employee would not earn weekly overtime until 48 hours total (when the weekly ST hours reach 40). With this option checked, the employee would begin earning weekly overtime at 40 hours total (when weekly ST hours reach 32).

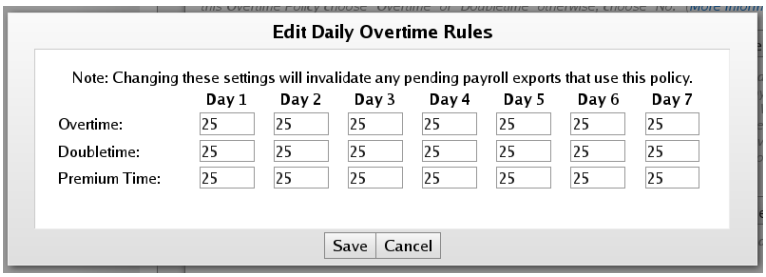
This option should generally be unchecked for federal labor law compliance.

- Choose whether an employee following this policy **Qualifies for Benefits That Count Towards Overtime**. Check the "Qualifies For Benefits" box if the employees following this policy should qualify for benefit types designated to count towards overtime/doubletime calculation. It is recommended this be checked.
- Choose whether to **Assign Overtime Requirements for Individual Work Days**. By default, TimeIPS uses the same overtime rules for all days in each work week. Use this option to assign different rules for each work day. These work days are defined according to the start of the work week, either as 24-hour days if the "168 Hour Workweeks" option is enabled or starting at the same clock time each day otherwise. This option only allows specifying rules for seven days; if used for an averaging period of two weeks or longer, the rules will be repeated each week.

NOTE: When this option is enabled, the single "Daily Requirements" option on the "General" tab is ignored.

  - Click on the Set Requirements button to Edit the Daily Overtime Rules.

NOTE: Changing these settings will invalidate any pending payroll exports that use this policy.



  - Click the Save button to impletment the change.

- Choose whether to **Assign Weekly Requirements for Individual Work Days**. By default, TimeIPS uses the same weekly overtime rules for all days in each work week. Use this option to assign different rules for each work day. These work days are defined according to the start of the work week, either as 24-hour days if the "168 Hour Workweeks" option is enabled or starting at the same clock time each day otherwise. This option only allows specifying rules for seven days; if used for an averaging period of two weeks or longer, the rules will be repeated each week.

NOTE: When this option is enabled, the single "Weekly Requirements" option on the "General" tab is ignored.

Example 1: Employees should earn ooubletime on the 7th day of the week, as long as they've worked at least 40 hours: Set the weekly doubletime level to 169 for days 1-6 and 40 on day 7.
Example 2: Employees should earn overtime on the weekend, as long as they've worked at least 32 hours in the week. Set the weekly overtime level to 40 for days 1-5 and 32 on days 6-7.
Example 3: Employees earn overtime after 32 hours during the week, but after 40 hours on weekends. Set the weekly overtime level to 32 for days 1-5 and 40 on days 6-7. Important: When the required hours increases later in the week, use care when combining this with the *Daily (or Forced) OT/DT/PT Reduces Weekly Requirement for OT/DT/PT* rule above. When employees reach OT for any reason, the weekly requirement will be reduced and it can result in unexpected overtime on days where the requirement level is increased.

- Click on the Set Requirements button to Edit the Weekly Overtime Rules.

NOTE: Changing these settings will invalidate any pending payroll exports that use this policy.

- Once you have completed your adjustments on the Advanced tab, click on the **Save Row** button to save your changes, or click on the **Revert Row** button to exit without saving your changes.

Pay Overrides

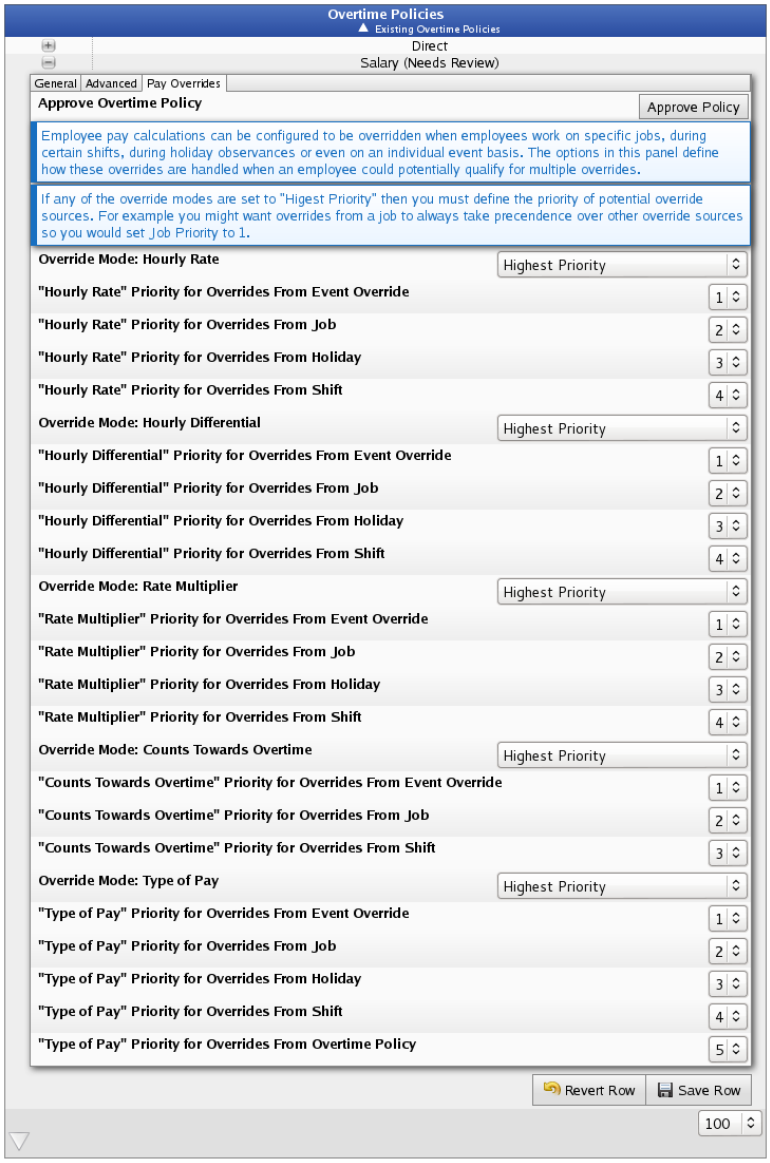
Employee pay calculations can be configured to be overridden when employees work on specific jobs, during certain shifts, during holiday observances or even on an individual event basis. The options in this panel define how these overrides are handled when an employee could potentially qualify for multiple overrides.

For each mode, choose how overrides are calculated when mulitiple overrides exist.

- **Highest Priority** will use the override source with the highest defined priority.
  - If any of the override modes are set to "Higest Priority" then you must define the priority of potential override sources.

For Example: You might want overrides from a job to always take precendence over other override sources so you would set Job Priority to 1.

- **Most Common** will attempt to choose the override value that is the most common among all overrides. In the case of a tie among multiple options, the system can either choose the best option for the employee (**Maximum**) or the worst option for the employee (**Minimum**).
- **Minimum** will use the worst overrides for the employee.
- **Maximum** will use the best overrides for the employee.
- **Average** will attempt to calculate the average value of overrides.
- **Sum** will attempt to add the value of all overrides.



- Once you have completed your adjustments, click on the **Save Row** button to save your changes, or click on the **Revert Row** button to exit without saving your changes.

Net Pay Calculation Source

As of TimeIPS v1.5, TimeIPS Overtime/Doubletime Net Pay Calculations are based on the following documentation taken from: http://www.dol.gov/dol/allcfr/ESA/Title_29/Part_548/29CFR548.2.htm

(e) The basic rate so established is authorized by Sec. 548.3 or is authorized by the Administrator under Sec. 548.4 as being substantially equivalent to the average hourly earnings of the employee, exclusive of overtime premiums, in the particular work over a representative period of time;
(f) Overtime hours are compensated at a rate of not less than one and one-half times such established basic rate;
(g) The hours for which the employee is paid not less than one and one-half times such established basic rate qualify as overtime hours under section 7(e) (5), (6), or (7) of the Act;
(h) The number of hours for which the employee is paid not less than one and one-half times such established basic rate equals or exceeds the number of hours worked by him in any workweek in excess of the maximum workweek applicable to such employees under subsection 7(a) of the Act;
(i) The employee's average hourly earnings for the workweek exclusive of payments described in paragraphs (1) through (7) of section 7(e) of the Act are not less than the minimum hourly rate required by this Act or other applicable law;
(j) Extra overtime compensation is properly computed and paid on other forms of additional pay which have not been considered in arriving at the basic rate but which are required to be included in computing the regular rate.
[20 FR 5679, Aug. 6, 1955, as amended at 26 FR 7731, Aug. 18, 1961]

See Also:
Workweek Groups
Overtime Policies

Pay Modifications

TimeIPS provides several ways to modify pay for worked time

- Jobs (Requires Jobs module ,IPSJOB)

- Shifts (Requires Shift module, IPSSFT)
- Holidays
- Overrides (Requires Overtime Options Module, IPSOTO)

For each of these, pay can be modified in the following ways:

- Pay at a set hourly rate. For example: $10.00/hour
- Pay with a differential amount. For example: The employee's base pay plus $1.00/hour
- Pay with a differential percentage. For example: 125% of the employee's base pay
- Pay a specific way. For example: Pay as Overtime, pay as Doubletime, Pay as Break time
- The time can either count toward OT or not. For example, a paid break would typically not count toward overtime. Normally, all worked time does count toward overtime

If multiple modifiers are specified, they will be be applied at the same time as follows:

(Hourly Rate + Differential Amount) * Differential Percentage

The pay type and counts-toward-overtime will then be applied as well.

Multiple pay modifiers can apply at the same time from different sources:

For example, an employee may be working a job that pays at $12, while on a shift that pays +$3.00 an hour, on a holiday that pays 125%. In such cases the employee will receive the modifier for the highest priority in each category (rate,differential amount, differential percentage, pay type and counts-toward-OT).

In cases where there is a conflict between the modifiers from different sources, the highest priority souce will be used. See the example below for a single span of time worked by an employee with an override, while one a job, on a holiday, during a shift:

	Rate	Differential Amount	Differential Percentage	Pay Type	Counts-toward-OT
Override	$10		150%		
Job	$12	+$1.00	120%		
Holiday			125%	Overtime	Does NOT count
Shift		+$3.00			

Priority is always in the following order: Override, Job, Holiday, then Shift. So, in the example, the employee would receive the value for each part of the modifier in the highest row for each category (shown in Red):

($10.00 + $1.00) *150%, paid as overtime, but not counting toward the weekly overtime.

Note: Choosing a benefit type such as Sick or Vacation for Pay Type will effectively pay as Standardtime but will be coded as the chosen benefit type. These hours will not be included in any benefit calculations.

See Also:
Holidays

Understanding Workweeks and Workweek Groups

What is a workweek?

In most situations, a workweek is a 168 hour period consisting of seven 24-hour days. These days and the entire week are important because they are used for the calculation of overtime, based on the Overtime Policy in place for the workweek.

Are workweeks the same as calendar weeks?

Most businesses and organizations will have workweeks and workdays aligned with calendar days, but this is not required. When employees follow workweeks that start in the middle of the calendar day, most reports and exports will follow the workweeks and workdays, rather than calendar days.

What is the workweek duration? Isn't a workweek always a week long?

In some situations, special kinds of workers, and in some countries outside the USA, employees may have workweeks that are 14, 21 or 28 days long. If you're not sure, always choose one calendar week as your workweek duration.

What is a Workweek Group?

Workweek Groups provide a way for a group of employees to follow specific dates and rules for workweeks and overtime calculations. Specifically:

- The starting date and time of the workweek for employees
- The initial Overtime Policy for employees
- The workweek duration (normally 1 week)
- The Workweek time zone
- Subsequent changes to any of the above, if needed

Can workweeks and workweek groups be changed at any time?

While it is technically possible to change workweeks (and/or workweek groups) it should normally be done as infrequently as possible. The reason is that the labor law treatment for employers who change workweeks is complex and always favors the employee.

For example, an employee with workweek that is changed will always have "overlapping" workweeks. This means that TimeIPS must consider both the old workweek, and the new one when figuring overtime. By labor law, time worked in the overlapping days must be calculated as if it belonged in each of the two weeks, then allocated into the week that would result in the maximum amount of overtime for the employee. This can result in unexpected overtime and can make reports difficult to read on the overlapping days.

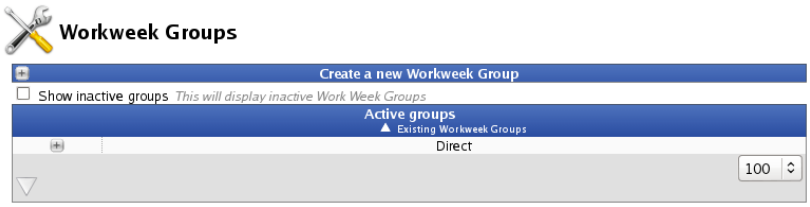
See Also:
Add/Edit Workweek Groups
Adding Employees to Workweek Groups
Overtime Policies

Add/Edit Workweek Groups

Workweek Groups allow administrators to manage sets of employees who follow the same workweek schedule and have their overtime calculation done in the same way.

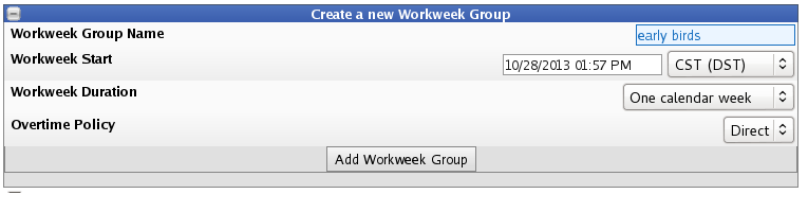
Using the left pane Main Menu » Administration, click on: Payroll » Workweek Groups

Add a Workweek Group



1. Click on the **+** sign next to **Create a new Workweek Group** to expand the window.

2. The **Create a new Workweek Group** screen will display.



3. Enter the **Workweek Group Name**.

4. Enter the date, time and time zone for the **Workweek Start**.

NOTE: This is an exact time of day (and day of week) when all employees who follow this Workweek Group start their own workweek. For example, if the workweek schedule for the employees in this group starts on Sunday at midnight, then any Sunday at 12:00 AM would be valid.

NOTE: Each Workweek Group must have at least one Workweek Period with a corresponding Overtime Policy and an effective date.

TIP: For the best historical tracking, you should select the first Sunday that any employee of this group used TimeIPS.

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5. Choose the **Workweek Duration** from the drop-down box.

NOTE: For most U.S. workers, this will be "One calendar week". Special employment situations may allow longer workweeks.

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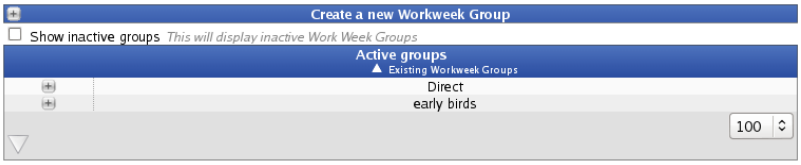
6. Select the **Overtime Policy** you want to use with this Workweek Group from the drop-down box.

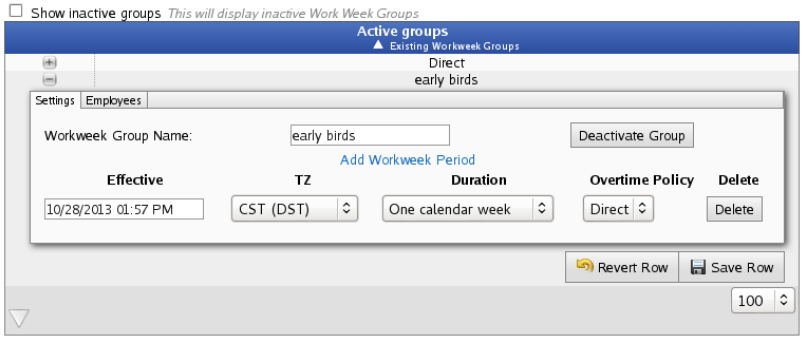
7. Click on the **Add Workweek Group** button to save.

8. Once saved, the new Workweek Group will appear on the Workweek Group list.



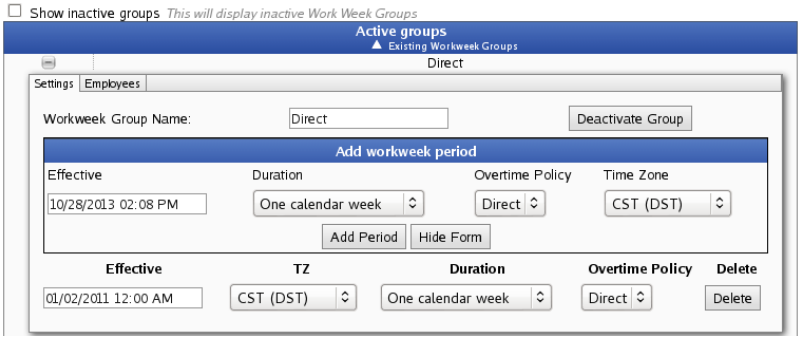
Add a New Workweek Period to an Existing Workweek Group

1. Click on the **+** sign next to the Workweek Group name to expand the record.



NOTE: Click on the - sign next to the Workweek Group name to collapse its record.

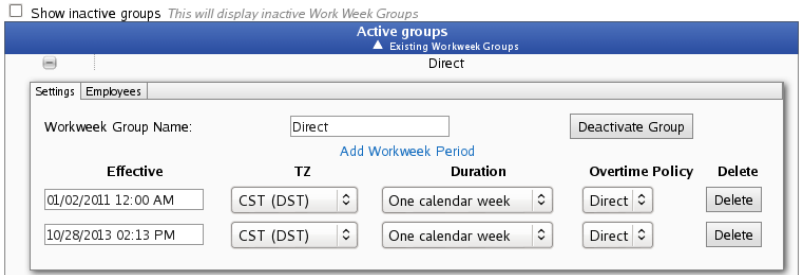
2. Click on the **Add Workweek Period** link. An **Add workweek period** window will appear below the workweek group name.



3. Enter the date and time the new workweek group becomes **Effective**, then select the **Duration**, **Overtime Policy** and **Time Zone** from the drop-down boxes.

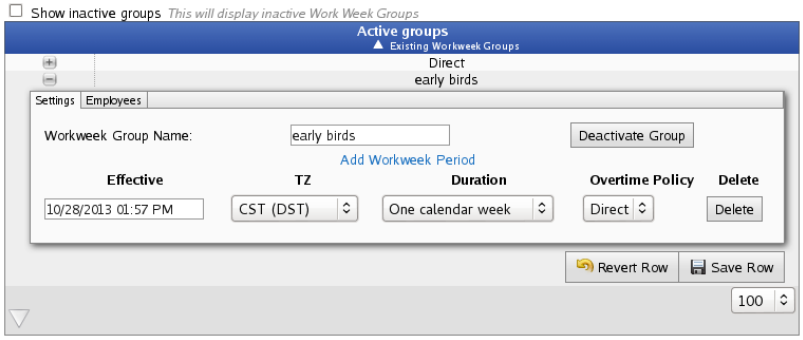
4. Click on the **Add Period** button to add the new workweek group period to your existing workweek group.

5. The new workweek group period will be added to the record.



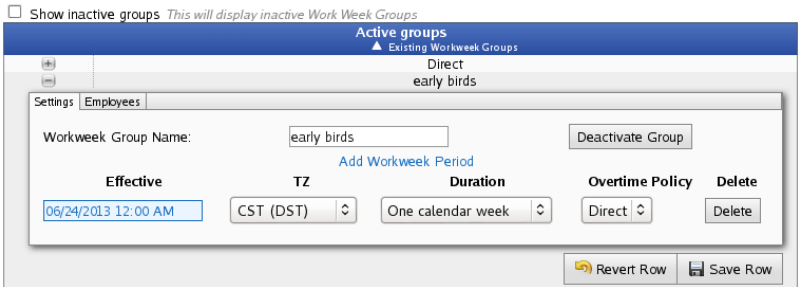
Edit an Existing Workweek Period

1. Click on the **+** sign next to the Workweek Group name to expand the record.

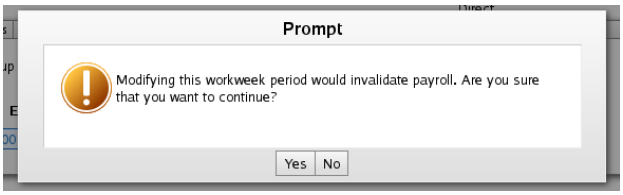


2. Overwrite the current date and time with the new date and time in the **Effective** field, then click on the **Save Row** button.

3. The edited text will turn blue in color and become italicized while the change is being made within the TimeIPS system.



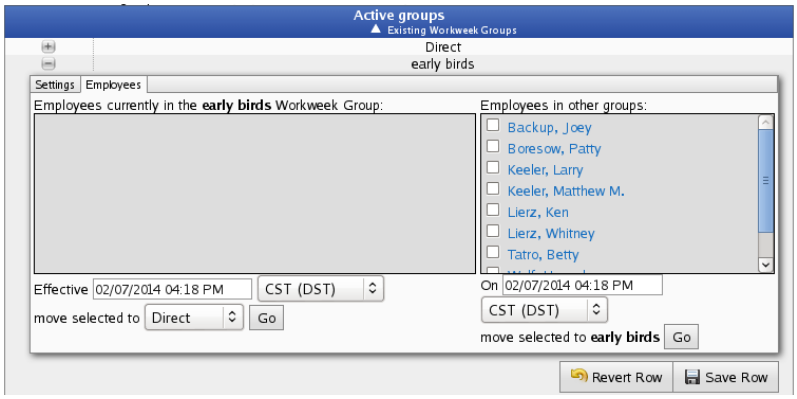
NOTE: If the change you are making to the date affects a pending payroll, you will receive the following warning:



Click on "Yes" to invalidate the pending payroll and save your change. Click on "No" to exit the warning window, then click on your browser's "Reload/Refresh" icon to exit the record without saving.

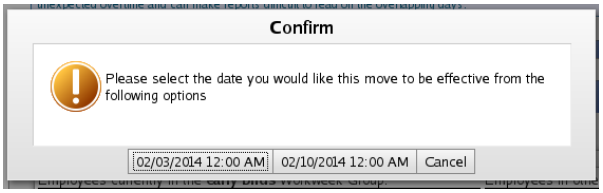
4. If the change does not affect pending payroll, the edited time becomes un-italicized and the text turns black again, indicating that the new time and date has been saved.

5. Click on the **Employees** tab to add or remove employees to/from this group.



- Place a checkmark in the box next to the employee's name in the **Workweek Group** window that you wish to move.
- Enter the **Effective** date and time when the employee should be moved to the new group, then (if needed) select the time zone from the drop-down box.
- Choose the Workweek Group from the drop-down box, then click the **Go** button.

NOTE: If the effective date you have chosen does not line up with the start of a work week, the system will prompt you to choose between tw0 start dates to continue.



See Also:
Workweek Groups
Adding Employees to a Workweek Group
Add/Edit Workweek Groups
Add/Edit Workweek Groups

Understanding the Spring DST Transition Overtime Calculation

The spring DST transition results in workweek changes that can generate unexpected overtime for employees working across workweek boundaries.

To view a description of the spring transition and view a graphical representation, please view SpringDSTtransition.pdf

The unexpected overtime is actually due to the change in workweek because of the "missing" hour in spring DST. Under Federal labor law, the missing hour causes the workweek that includes the DST transition day to be an hour short (167 hours instead of the legal 168 hours) and therefore overlap by one hour the following week for overtime calculations.

In the case that employees work across the boundary between these weeks, there is special treatment required under Federal labor code for overtime calculation, as described in 29 CFR 778.301 and 29 CFR 778.302.

29 CFR 778.301 and 302 - Computation of overtime due for overlapping workweeks.

This may result in as much as 1 extra hour of overtime being legally required for employees, and this overtime will be paid in the workweek following the week where the DST transition occurred.

For example, consider the two week period as follows, and shown graphically on the next page:

Workweeks start at 12:00AM.
Workweek 1 is the week that includes the DST transition.
Workweek 2 is the following week.

Workweek 1 is only 167 hours because 12:00AM at the end is actually at 11:00PM on the previous day, if it were not for DST.

Workweek 2 is 168 hours, but the first hour actually would have been in the previous week if it were not for DST. This hour is called the "overlapping hour" and will be overtime in the following example:

An employee works 40 hours in what would have been Workweek 1 without DST. This means the employee works during the overlapping hour.

The employee then works 40 hours in Workweek 2.

This is 80 hours total in two weeks, which intuitively would mean no overtime. However, the employee is actually due 1 hour of overtime because the first 39 hours are attributed to Week 1 which ended early, pushing one hour into week 2, which then has 41 hours total.

Other combinations of hours in Week 1 and Week 2 can also result in overtime when time is worked during the overlapping hour. The calculation will depend on the hours worked in each week and if those hours put the employee into overtime or not in each week. Per Federal labor law, TimeIPS will calculate hours in the way that results in the most overtime for the employee and will indicate that such hours would be paid as overtime.

If you have questions on the detail of the law's handling of this situation, we advise seeking council from an attorney specializing in time and labor law.

To avoid unexpected overtime:

- Do not have employees work in the overlapping hour where one workweek transitions into the next.
- Use the payroll engine option to allow 167/169 hour workweeks to just stretch or shrink the weeks to match DST.
- Set workweeks to follow your timezone, but without DST. This will cause all workweeks to be 168 hours without any overlaps. During DST, the weeks will be considered one hour offset, i.e. 1AM to 1AM instead of 12:00AM to 12:00AM.

Understanding the Fall DST Transition Overtime Calculation

The fall DST transition results in workweek changes that can generate unexpected regular time for employees who work across workweek boundaries.

To view a description of the spring transition and view a graphical representation, please view FallDSTtransition.pdf

The unexpected regular time is actually due to the change in workweek because of the "extra" hour in fall DST. Under Federal labor law, the extra hour causes the workweek that includes the DST transition day to end an hour early. Then, a new workweek begins, creating a one hour gap in weeks for overtime calculations.

In the case that employees work across the boundary between these weeks, there is special treatment required under Federal labor code for overtime calculation, as described in 29 CFR 778.301 and 29 CFR 778.302.

29 CFR 778.301 and 302 - Computation of overtime due for overlapping workweeks.

This may result in as much as 1 extra hour of regular time for employees, and this will normally show as an extra hour of regular (non-overtime) during the week where the DST transition occurred.

For example, consider the two week period as follows, and shown graphically on the next page:

Workweeks start at 12:00AM.
Workweek 1 is the week that includes the DST transition.
Workweek 2 is the following week.

Workweek 1 is 168 hours long. This means it must end “an hour early” because 12:00AM at the end is actually at 1:00AM on the next day, if it were not for DST.

Workweek 2 is 168 hours long also. It starts a hour later so that the end matches the new 12:00AM without DST. The “Gap” is this hour between when the old workweek started and when the new workweek starts.

An employee works 41 hours in what would have been Week 1 without DST. This means the employee works during the gap.

The employee then works 40 hours in Week 2 as well.

This is 42 hours total in a “week”, which intuitively would mean two hours of overtime. However, this “week” is actually a week plus one hour. The employee is due 1 hour of regular time for the first hour that is attributed to Week 1. All remaining time is in week 2, which then has 41 hours total, of which only 1 hour is overtime.

Other combinations of hours in Week 1 and Week 2 can also result in extra regular time when time is worked during the gap. The calculation will depend on the hours worked in each week and if those hours put the employee into overtime or not in each week. Per Federal labor law, TimeIPS will calculate hours in the way that results in the most overtime for the employee and will indicate that such hours would be paid as overtime.

If you have questions on the detail of the law's handling of this situation, we advise seeking council from an attorney specializing in time and labor law.

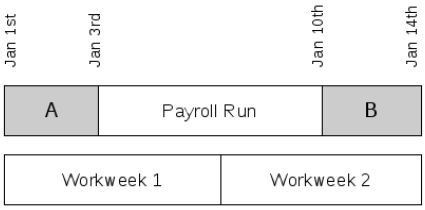
To avoid unexpected overtime:

- Do not have employees work in the overlapping hour where one workweek transitions into the next.
- Use the payroll engine option to allow 167/169 hour workweeks to just stretch or shrink the weeks to match DST.
- Set workweeks to follow your timezone, but without DST. This will cause all workweeks to be 168 hours without any overlaps. During DST, the weeks will be considered one hour offset, i.e. 1AM to 1AM instead of 12:00AM to 12:00AM.

Understanding Workweeks and Payroll Invalidation

Normally, payroll is prepared for a time frame that exactly matches one or more workweeks. However, it is possible to prepare a payroll run for any period of time including partial weeks. If the payroll run dates do not match with the workweeks of the employees included in the run, unexpected invalidations (or inability to edit for locked payroll) can occur up to one workweek following the report.

For example, in the diagram below, the "Payroll Run" is from Jan 3rd to Jan 10th. This time overlaps two workweeks for an employee as shown. The range of time where edits and adjustments can invalidate the payroll is not just the payroll run itself, but also time "A" (before) and "B" (after).



An edit during the range "A" may invalidate the payroll run for a number of reasons. Some examples are:

1. Adding, editing or removing worked time:
   Any change in the amount of time worked during "A" could change the point at which overtime will be reached in the week, thereby changing the amount of standard/overtime/doubletime pay during the payroll run and invalidating it.
2. Changing an employee's pay rate:
   If an employee gets a raise during the period "A" it may effect the total pay for the week and the FLSA base rate for part of the payroll run, invalidating it.
3. Changing the pay or type of pay for any time:
   If the amount of pay or the type of pay is modified (by direct edit, job differential, shift differential or holiday differential) then employee's FLSA base rate will change. This may effect the pay during the payroll run, invalidating it.
4. Changing the workweek itself and/or overtime policies:
   If any change is made to workweeks or overtime policies during "A" it will be very likely to change the calculation of overtime in workweek 1 and workweek 2, invalidating the payroll run.

An edit during the range "B" may also invalidate the payroll run. Under FLSA law, overtime pay must be a minimum of 1.5 times an employee's "base rate" where the "base rate" is calculated as the entire pay for the week divided by the entire hours for the week. Changes during "B" can effect both the entire pay for the week and the entire hours for the week. For example:

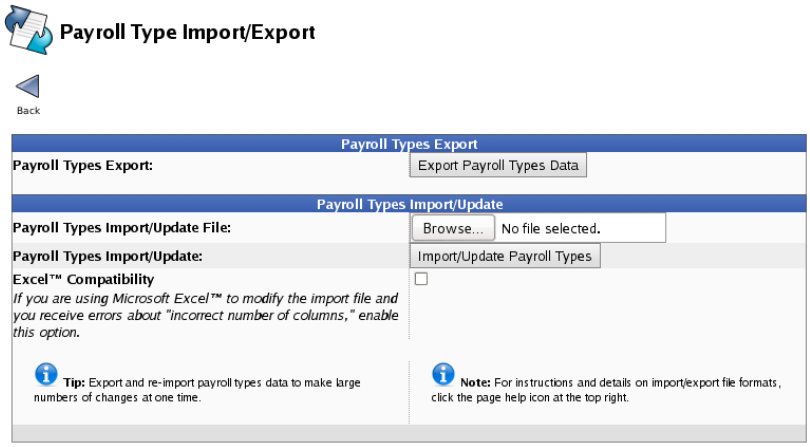
1. Adding, editing or removing worked time:
   A change to the number of hours in "Workweek 2," even in the "B" period, can result in a change in the "base rate" if:
   1. Any time in Workweek 2 is paid at a non-standard rate, or
   2. Any piecework pay has occurred during Workweek 2
2. Other changes:
   In addition, even if the number of hours in workweek 2 do not change, there are many changes in "B" that may invalidate the payroll run by changing the total amount earned in the week. For example:
   1. A pay rate change (raise)
   2. Making a manual manual override on any time to a rate different than the employee's rate (set pay rate or differential)
   3. Changing worked time to/from a job that paid at a rate different than the employee's rate (set pay rate or differential)
   4. Changing worked time to/from a shift that paid at a rate different than the employee's rate (set pay rate or differential)
   5. Changing worked time to/from a holiday that created a rate different than the employee's rate (set pay rate or differential)
   6. Adding or removing paid piecework, tips, commissions or non-discretionary bonuses at any point in Workweek 2.
   7. Changing the settings for piecework, tips, commissions or non-discretionary bonuses, job differentials, shift differentials or holiday differentials for any point in Workweek 2.

To avoid unexpected invalidations and/or inability to edit time outside the payroll date range:
- Always run payroll for dates that match with employee workweeks. For example, if employee workweeks are Sun 12:00AM to Sun 12:00AM, be sure to run payroll reports that start and stop on Sun at 12:00AM also.
- Always run payroll for dates in the past, such that no edits will be made in any workweeks overlapped by the report.

Import/Export Payroll Types

*TimeIPS can import Payroll Types and can also update records using the TimeIPS Import/Update Feature. The **IPSEMP** Employee Import/Export optional module is required.*

Using the left pane Main Menu » Administration, click on: Payroll » Import/Export



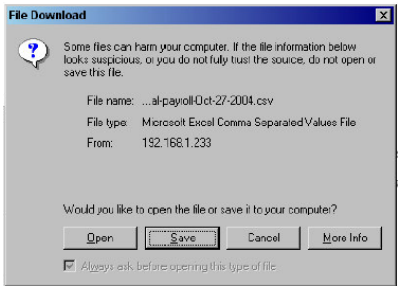
To Import Data

1. Click on the **Browse** button and navigate to the CSV file to be imported.
2. Click on the **Import/Update Payroll Types** button.

NOTE: TimeIPS updates payroll types using the Payroll Type name. Therefore, you can not update this field using this feature.

To Export Data

1. Click on the **Export Payroll Types Data** button.
2. A File Download or similar window displays:



NOTE: Your screen may look different than the screen above, depending on your computer's operating system.

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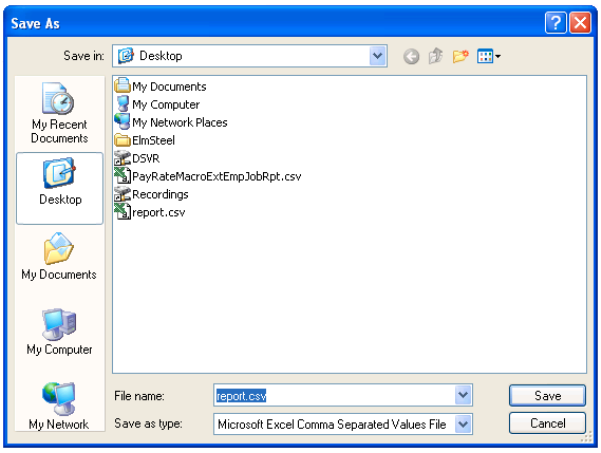
3. Select to **Save** the file to disk and save it in an easy-to-find location such as your desktop.

4. A Save As or similar screen displays:



5. Double-click on the file to open the saved employee export file in your spreadsheet application or import the file into the applicable application .

NOTE: Some spreadsheet applications do not extend columns enough, designated in numeric columns with "######". Click and drag the column's right margin to extend it manually.

Overview of TimeIPS Reports

TimeIPS includes a number of reports for tracking trends, reviewing hours worked, and running payroll.

Time Edit/Report

- Provides a way to see and edit worked time during any selected duration, for any set of employees
- Customizable columns with presets
- Two view modes, detail and summary
- Detail mode shows each time event
- Summary mode shows total time per employee
- Advanced grouping allows viewing totals per day, week, month, quarter, year, etc.
- When viewing an individual, additional details for benefit, holiday and piecework are also available

Special Reports

- Custom (requires IPSRPT module) provides a powerful customizable reporting engine
- Sign Off report shows time worked by day and week per employee and includes convenient PDF output option
- Tardy report shows when employees are/were scheduled to arrive and violations of the schedule
- Audit reports allow viewing who changed time, when and why

Payroll Reports

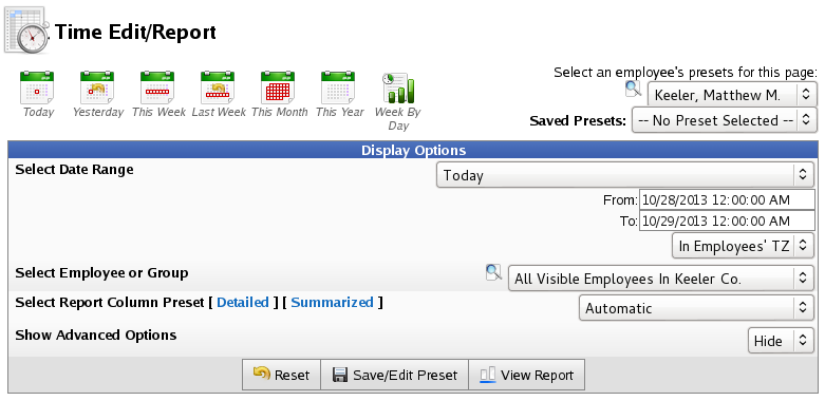
- Custom (requires IPSEPI or IPSEPC) provides the same power of the customizable report engine, but with payroll functions including locking
- Quickbooks (requires IPSQBI) provides direct integration with Quickbooks for payroll data
- Manual provides a quick, simple payroll export ideal for manually processing payroll
- Many others designed for the specific payroll format listed

Time Edit/Report

The Time Edit/Report interface is designed to be a quick, simple, easy to use yet powerful and flexible tool for viewing employee worked time, benefit time, and holiday time. This support article will walk you through the basics of the interface itself for the most common tasks, and also explore some of the features and options that make Time Edit/Report a powerful tool for running your business.

NOTE: The IPSPRM Module provides access to the Time Edit/Report Interface which is controlled by the *Clock Events* permission. Any employee that can view worked time will be able to access the interface itself. The content of the reports are restricted by the Employee's permission to view *Clock Events, Benefits*, and *Holiday Events* for other employees. These reports will be restricted by these permissions as well.

Using the left pane Main Menu » Administration, click on: Reports » Time Edit/Report

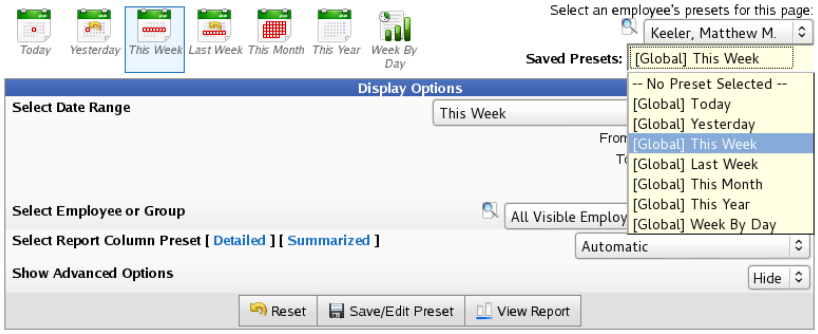


Generate a Report Using Presets

- Choose a **Saved Preset** from the drop down menu or click on the associated Short Cut icon across the top.

  This will populate the Date Range, Employees, and Columns to display, as well as any advanced options you might have included

- Click on the **View Report** buton to display the report.



Generate a Report Manually

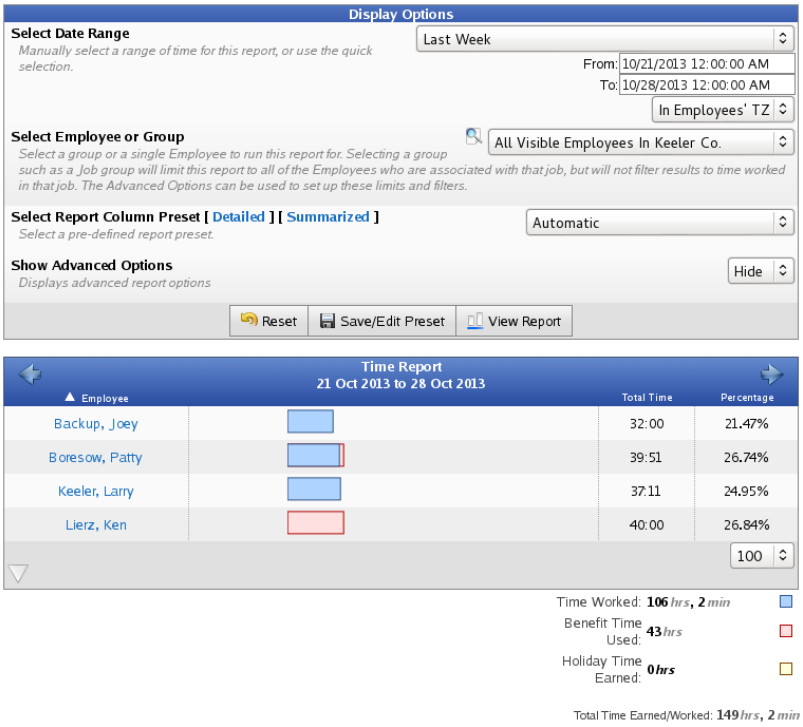
- **Select Date Range:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- **Select Employee or Group.** Use this selector to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

NOTE: Selecting a group such as a Job group will limit this report to all of the Employees who are associated with that job, but will not filter results to time worked in that job. The Advanced Options can be used to set up these limits and filters.

- **Report Column Presets.** You can use this selector to choose between **Detailed** and **Summarized** reports, and choose your presets that determine which columns should be displayed in the report. The *Detailed Time Report* will show every individual event for the Employees selected in a given range, while the *Summarized Time Report* by default will summarize all worked time by employee.
- Click the **Reset** button IF you wish to revert your selections back to the defaults.
- Click the **View Report** button to create the report.

Summarized Time Report

The columns that are visible in this report can be set up using the presets provided in the Control Panel. In the default preset, the *Summarized Time Report* shows a basic summary of information. Clicking on an Employee's name will generate a *Detailed Time Report* for that person.

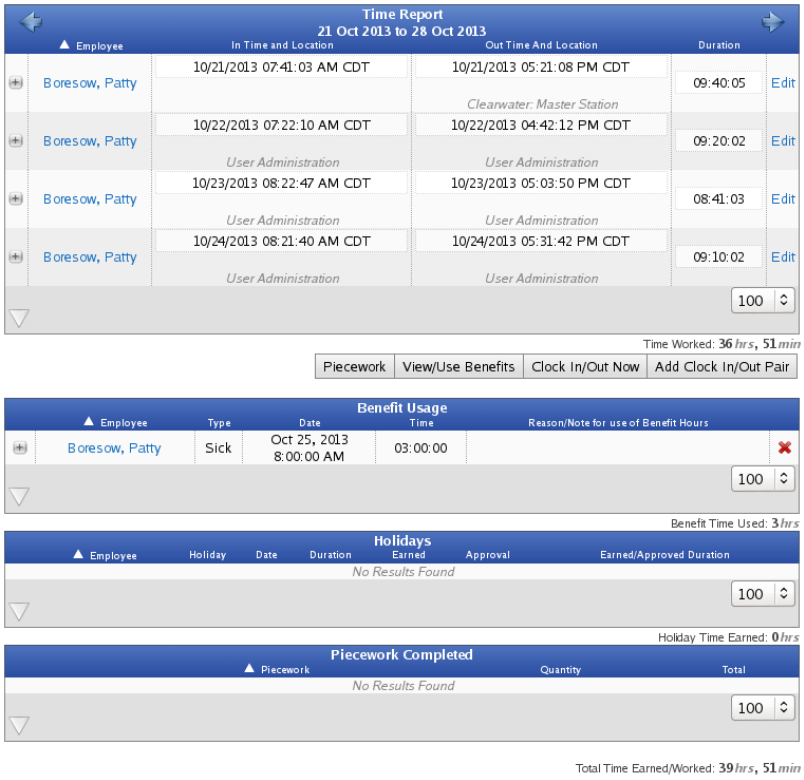


In this example, the report is displaying a summarized view of the worked time for All Visible Employees in Keeler Co. There are four people with time in this report. One person, Ken Lierz, is on vacation this week, while Patty Boresow has used some benefit time as well.

Detailed Time Report

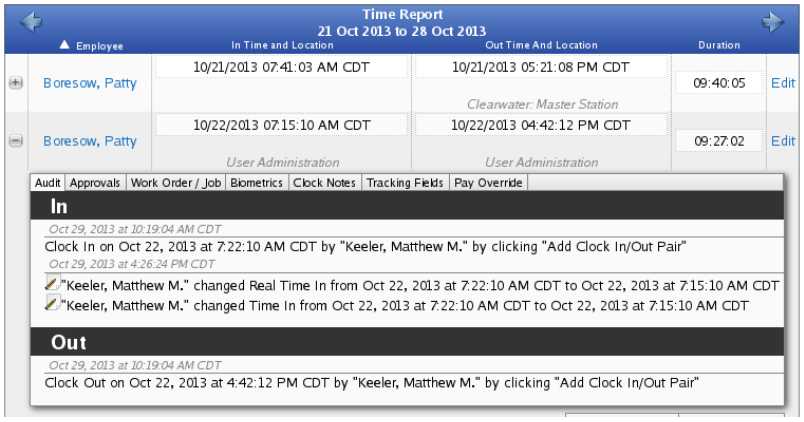
The Detailed Time Report displays all the information about the clocked time, including the Job, Work Order, Clock Location, and Duration of the event. More details are available in different columns, which can be configured using the Presets for the *Detailed Time Report*.

By clicking on Patty Boresow's name in the *Summarized Time Report*, we are able to view her detailed information.



Audit Details

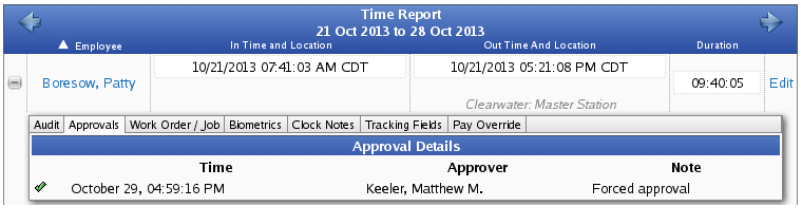
To view the Auditing information about an event, you can expand the row by clicking the **+** (plus) sign to the left of the row.



In this audit, we can see that Patty was clocked in by Matthew Keeler using the "Clock In/Out Now" button at the bottom of the Time Edit/Report Interface, and then changed the time from 7:22am to 7:15am. Clicking **Edit** will take you to the Time Edit interface where the clock can be modified or even deleted.

Approvals

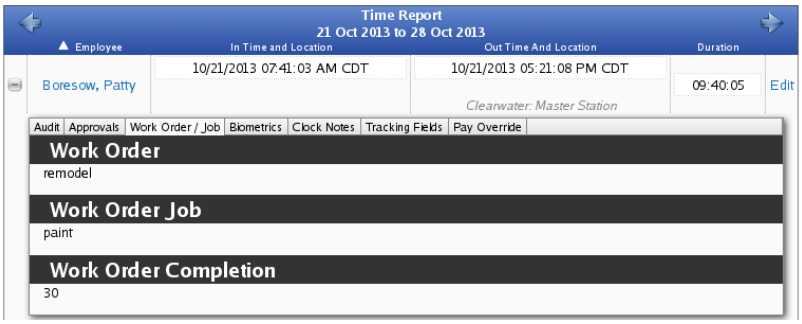
To view the Approvals for an event, expand the row by clicking the **+** (plus) sign to the left of the row, then click on the Approvals tab.



Here we can see that Patty's time was approved by Matthew Keeler on October 29th.

Work Order/Job Details

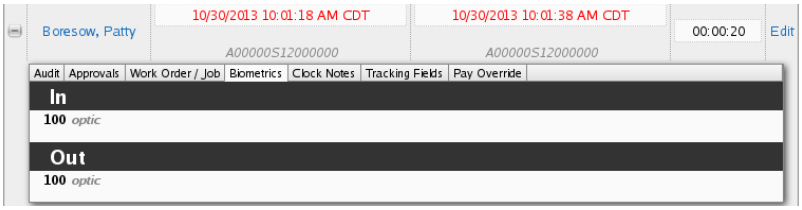
To view the Work Order and Job details for an event, expand the row by clicking the **+** (plus) sign to the left of the row, then click on the Work Order/Job tab.



Here we can see that Patty's painting job is 30% complete.

Biometrics

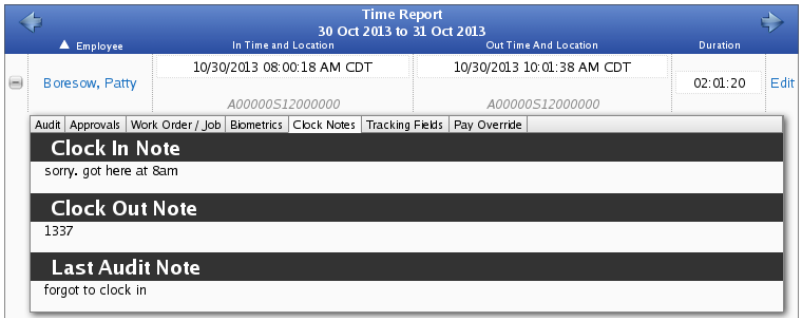
To view the Biometric details for an event, expand the row by clicking the **+** (plus) sign to the left of the row, then click on the Biometrics tab.



Here we can see that Patty received an optic score of 100.

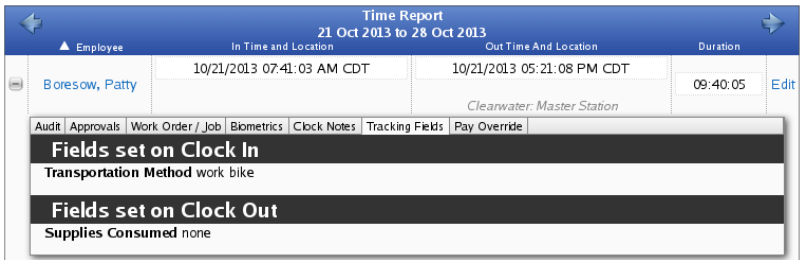
Clock Notes

To view the Clock Note details for an event, expand the row by clicking the **+** (plus) sign to the left of the row, then click on the Clock Notes tab.



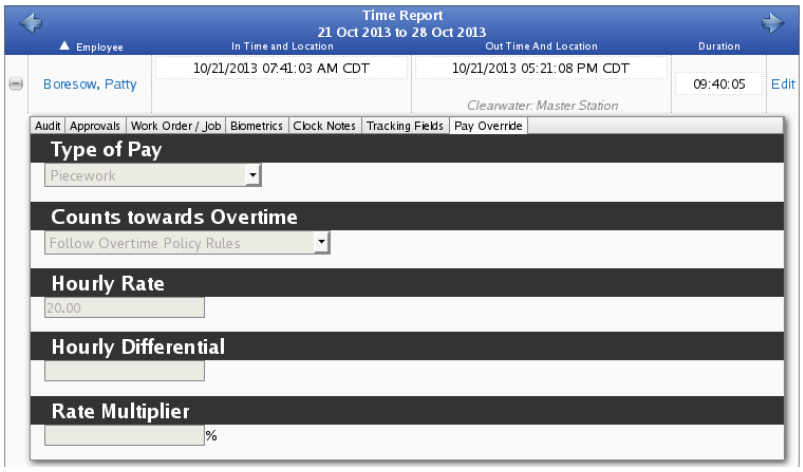
Tracking Fields

To view the Tracking Field details for an event, expand the row by clicking the **+** (plus) sign to the left of the row, then click on the Tracking Fields tab.



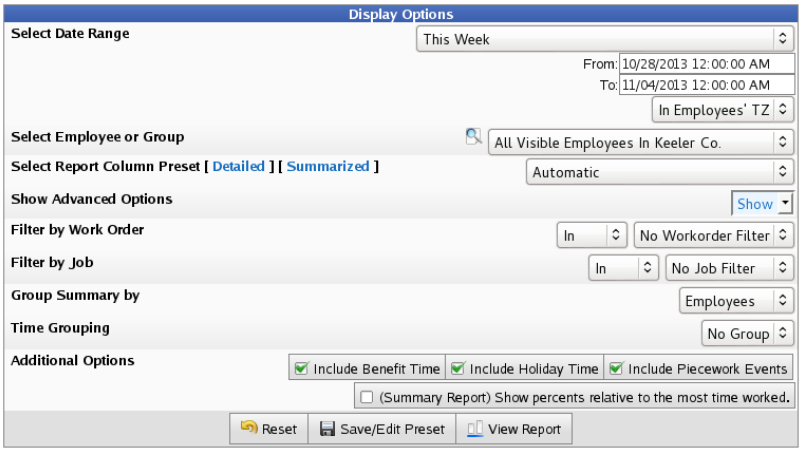
Pay Override Details

To view the Pay Override details for an event, expand the row by clicking the **+** (plus) sign to the left of the row, then click on the Pay Override tab.

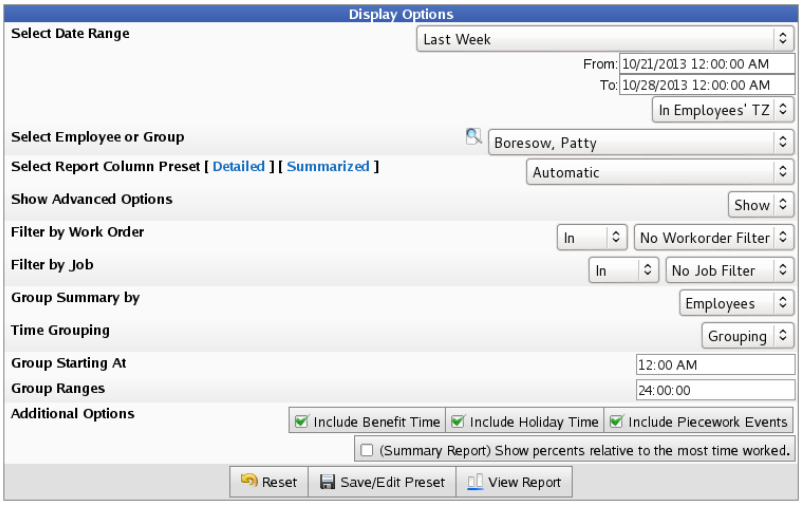


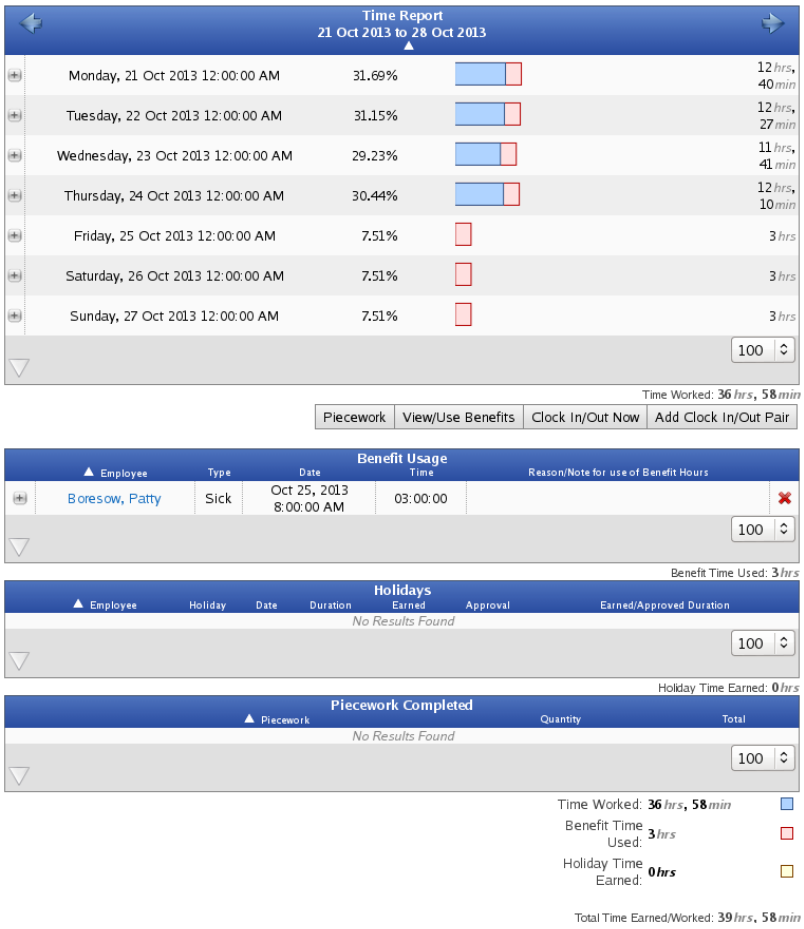
Advanced Operation

By Showing Advanced Options on the Control Panel, you can enable additional options for advanced operation.

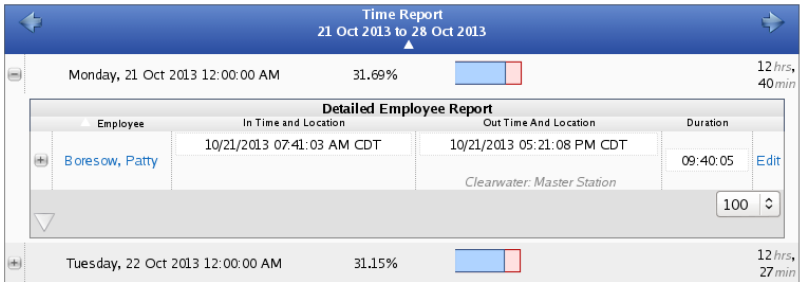


1. Selecting **"Show" Advanced Options** enables advanced options and expands the window to display additional controls.
2. **Filter by Work Order** requires the IPSJWO Module.
   - **No Workorder Filter** will not apply a filter.
   - **Any Workorder** will only show results that have a work order.
   - Selecting **a specific Work Order** from the drop down menu will only show time worked on that specific Work Order and will update the Jobs filter to contain jobs and segments of jobs configured for the selected Work Order.
   - You must select a work order in order to view events worked **In** it or **Not In** it. The **In/Out** toggle filter for Work Orders will filter by clock events where employees were either clocked in to the specified job filter, or not clocked into the specified job filter.
3. **Filter by Job** offers the option to filter results to show events worked in **No Work Order Job**, in **Any Work Order Job**, in a specific **Segment**, or in a specific **Work Order Job**.
   - When using a Job filter, the **In/Out** toggle will filter results by clock events either explicitly worked **In** a selected Job, or **Not In** a selected Job. You must select a specific job in order to view events worked in it or not in it.
4. Choose to have either a **Group Summary by** "Employees", "Jobs", or "Work Orders". When viewing a summary report, this selection changes the way the summary is grouped and displayed.
   - Grouping by **Employees** will return a result for each Employee, with a summary of that Employee's Time.
   - Grouping by **Jobs** will return entries for all the jobs worked in the selected time.
   - Grouping by **Work Orders** will group events into Work Order categories.
5. **Time Grouping** is a special display mode that ignores most of the advanced options in the control panel. Time Grouping is used to display spans of time across a range. For example, you can split up a selected week into individual days, so that you can see the daily breakdown. An example of the result can be seen below.
   - Under **Group Starting At**, select the time of a day at which to begin separating ranges into groups. Grouping will occur for the durations starting at the first time this time occurs in the report range.
   - Grouping can be done by any arbitrary amount of time by specifying a length of time under **Group Ranges**. By default, the Time Report is configured to use ranges of a full day (24 hours).

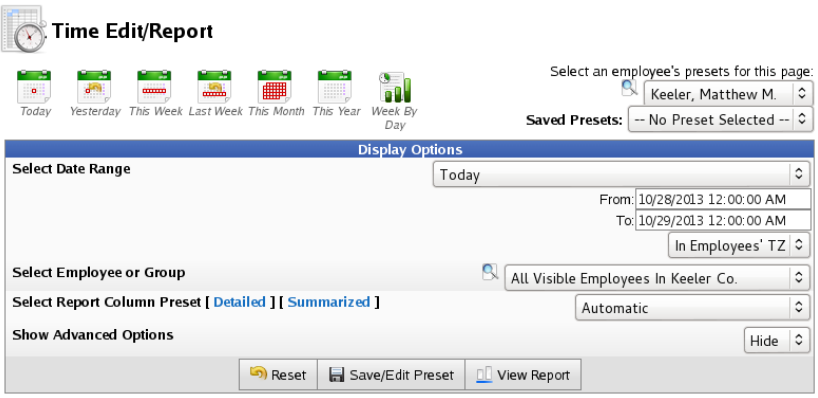




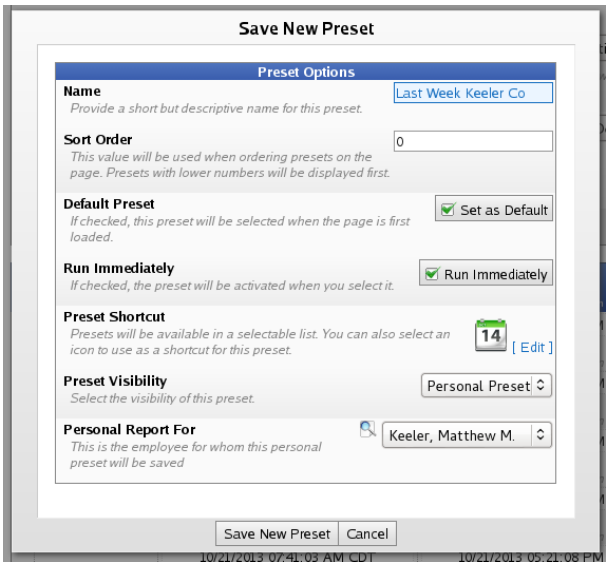
And just like the *Detailed Time Report*, you can expand the individual rows to see more detailed information about the range you have selected. Click on the **+** (plus) sign the the left of the clock entry, then click the **+** (plus) sign to the left of the employees name for more detail.



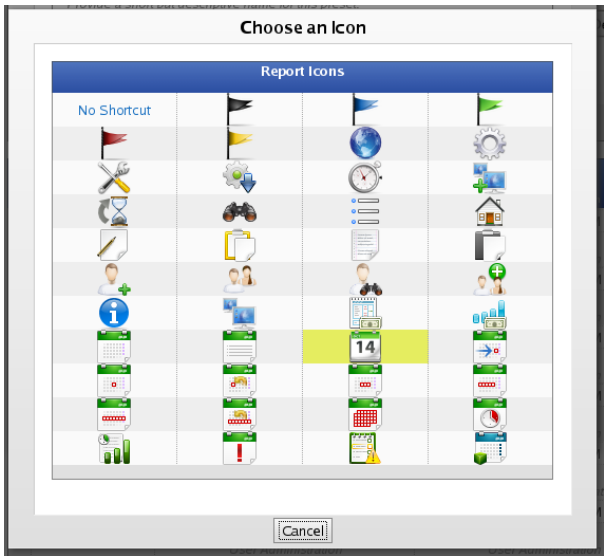
Create New Preset



- Set the Display Options the way you want them to be in the report.
- Click the **Save/Edit Preset** button at the bottom of the window.



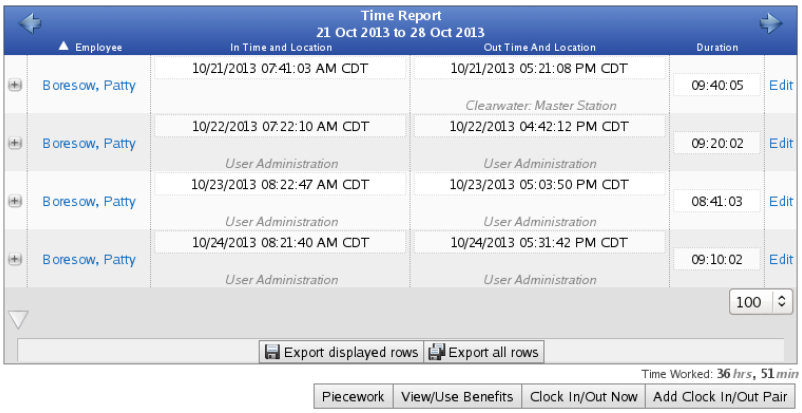
- Provide a short but descriptive **Name** for this preset.
- Assign a **Sort Order**. This value will be used when ordering presets on the page. Presets with lower numbers will be displayed first.
- If this should be the **Default Preset**, check the "Set as Default" box. If checked, this preset will be selected when the page is first loaded.
- Check the **Run Immediately** box to auto generate the report (using this preset) when the Time Edit/Report link is clicked on from the main menu.
- Pick a unique icon to be used as the **Preset Shortcut** which will appear at the top of the page with the other shortcuts.



- Set the **Preset Visibility** based on who should be able to view this preset.
- If you choose "Personal Preset", then pick the employee for whom this is a **Personal Report For**.
- Click the **Save New Preset** button to implement the changes.

Export to CSV

Like most reports in TimeIPS, the Time Edit/Report can generate a Comma-Separated-Value export file.

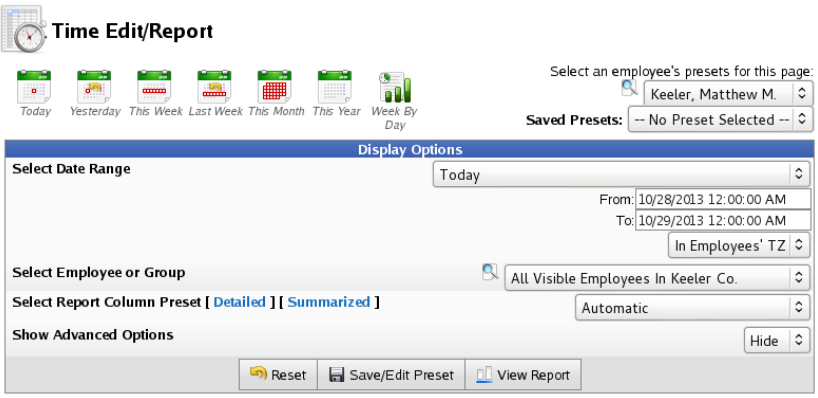


- Once the report has been ran, you can export it by clicking on the grey "down arrow" located at the bottom left of the report.
- Then click either the **Export displayed rows** or the **Export all rows** button to save a file that can be loaded as a spreadsheet. Clicking the *Export Displayed Rows* will generate a CSV file for the page you are currently looking at, while *Export All Rows* will generate a CSV export for the entire report, including all of its pages.

Manage Detailed and Summarized Report Presets

Presets for the Detailed and Summarized Time Report control which columns are displayed on the report. The Detailed Time Report and Summarized Time Report have different column selections.

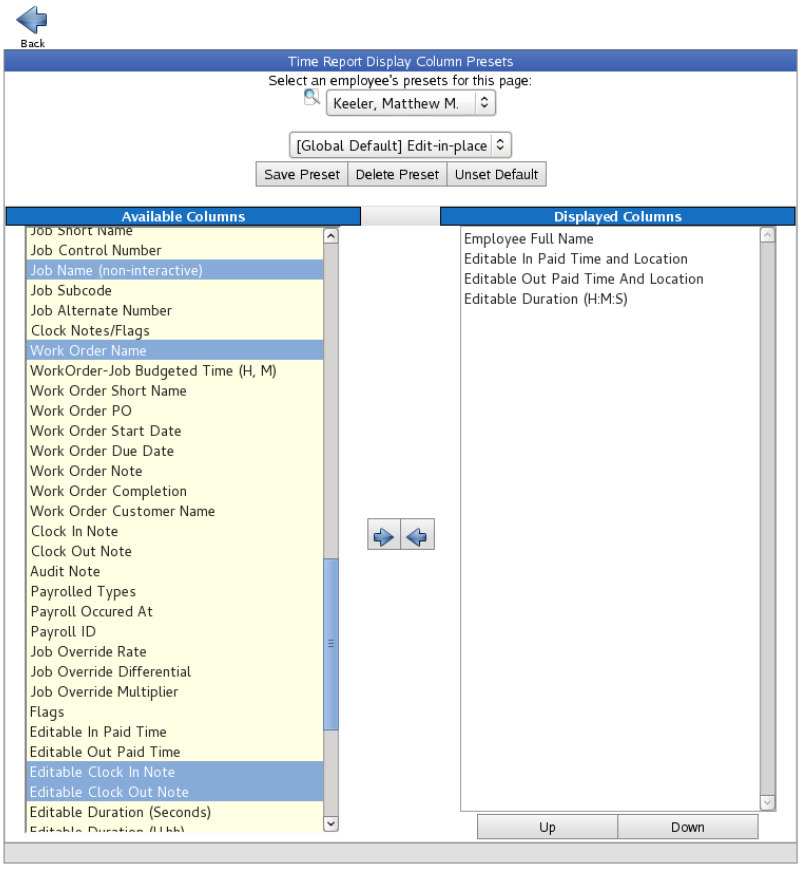
Using the left pane Main Menu » Administration, click on: Reports » Time Edit/Report



DETAILED REPORT PRESETS

- From the Time Edit/Report, click [**Detailed**] to open the preset control panel.

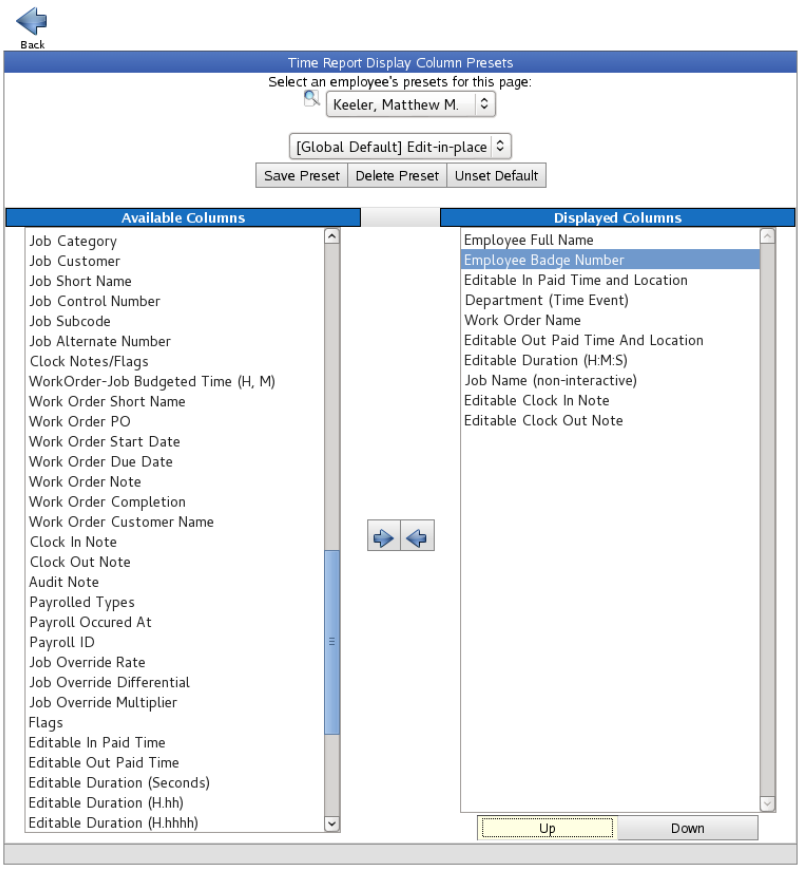
Manage detail report column presets.



- Select the columns you want to view by clicking on them from the **Available Columns** panel.

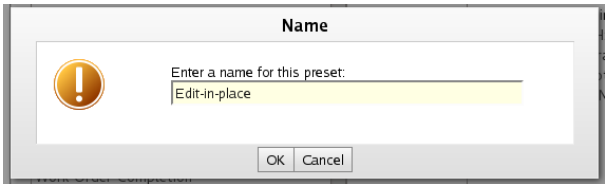
TIP: Hold down the Ctrl key to select and move multiple columns at once.

- Click the blue arrow pointing to the right to move these columns to the **Displayed Columns** panel.



- Columns can be sorted into a specific order from the Displayed Columns panel. Click on the column you want to move and then click the **Up** or **Down** button to arrange them.

- When you have finished modifying your preset, click the **Save Preset** button.



- Type in a descriptive name and click **OK**.

- Choose whether to save it as a Personal, Division, or Global Preset. This determines who is able to view it.

To return to the Time Report Interface, click the **Back** button

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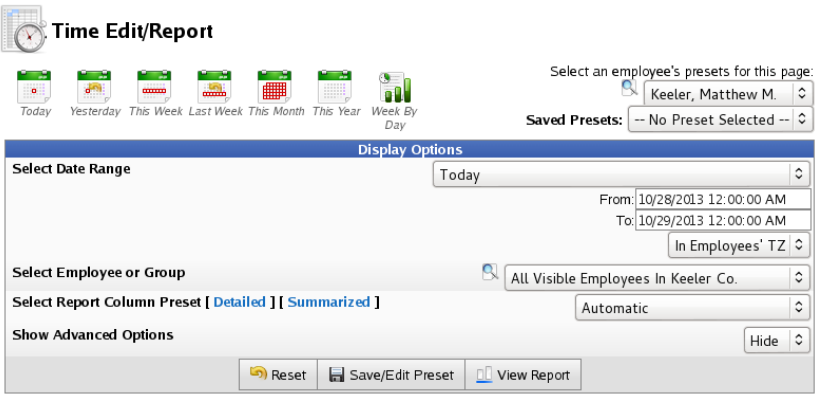
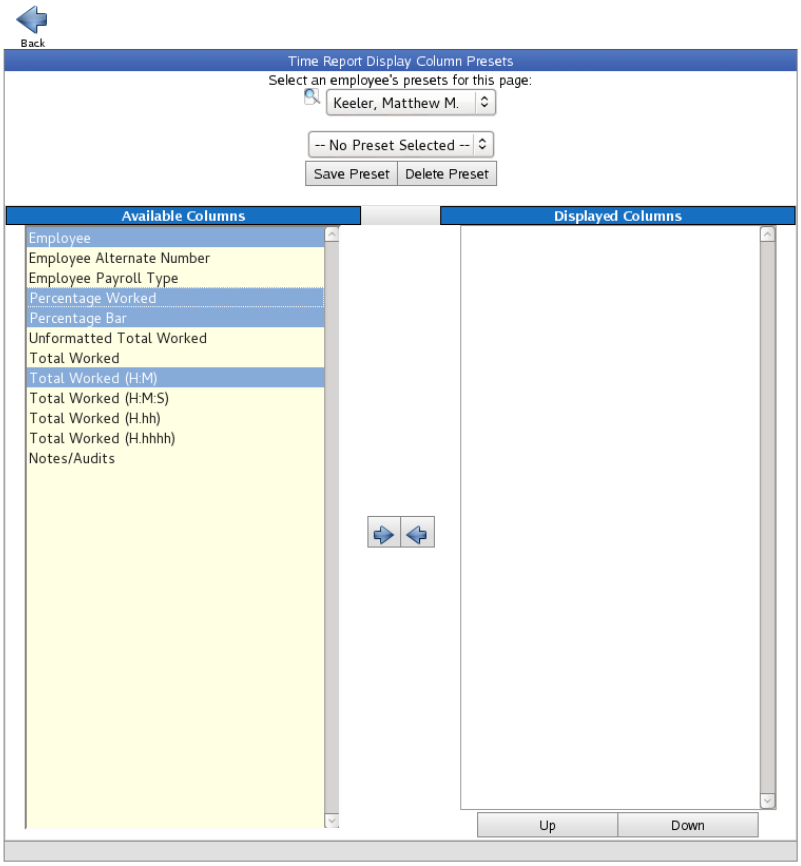
SUMMARIZED REPORT PRESETS



- From the Time Edit/Report, click [**Summarized**] to open the preset control panel.

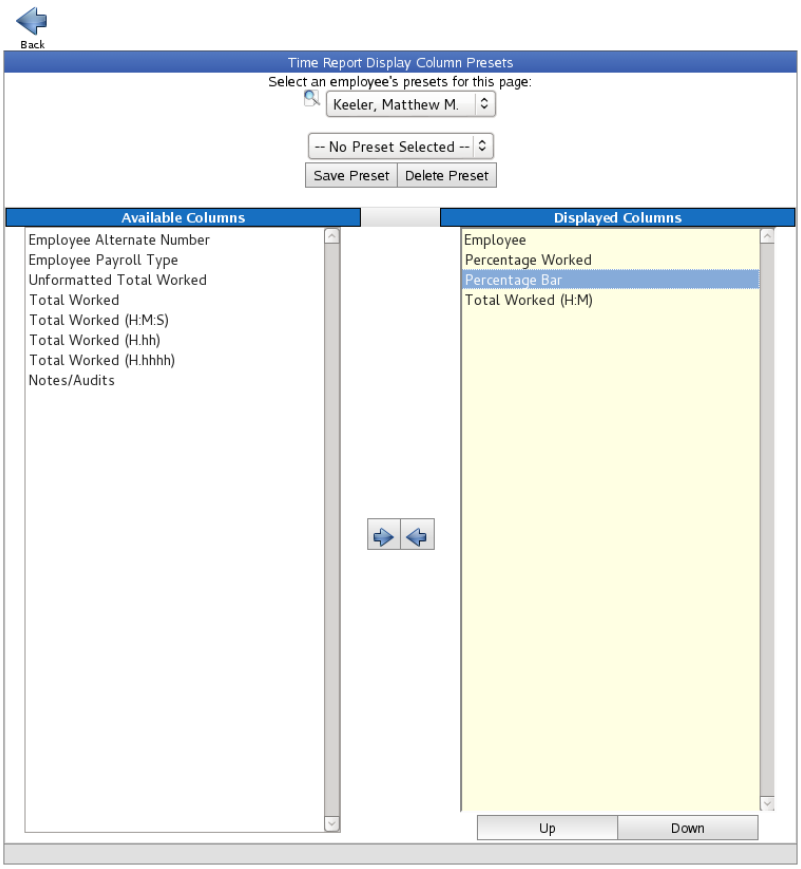
Manage summary report column presets.



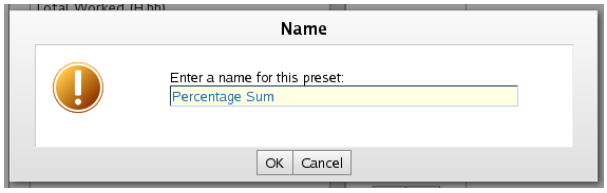
- Select the columns you want to view by clicking on them from the **Available Columns** panel.

  TIP: Hold down the Ctrl key to select and move multiple columns at once.

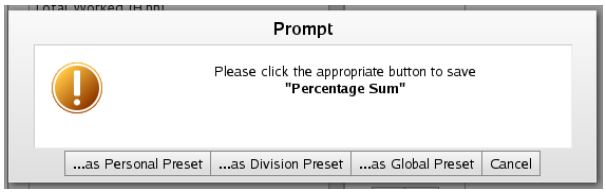
- Click the blue arrow pointing to the right to move these columns to the **Displayed Columns** panel.



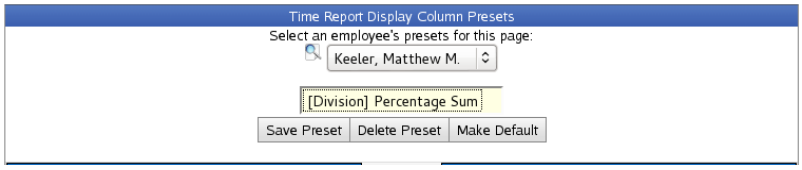
- Columns can be sorted into a specific order from the Displayed Columns panel. Click on the column you want to move and then click the **Up** or **Down** button to arrange them.
- When you have finished modifying your preset, click the **Save Preset** button.



- Type in a descriptive name and click **OK**.



- Choose whether to save it as a Personal, Division, or Global Preset. This determines who is able to view it.



- To set this as the default, click the **Make Default** button.

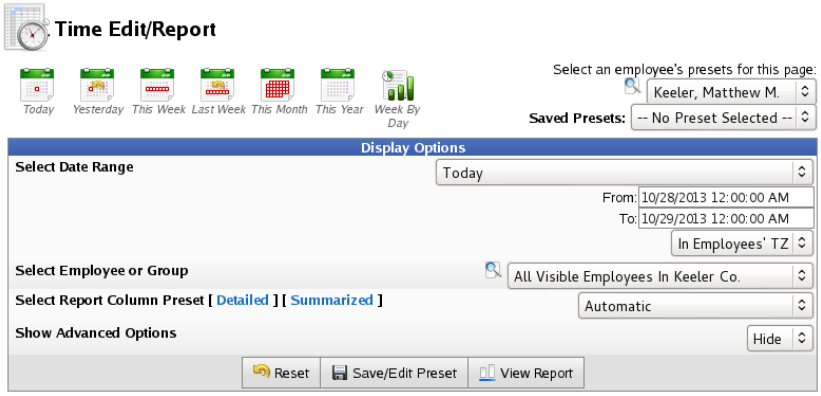
To return to the Time Report Interface, click the **Back** button

See Also:
Manage Detailed and Summarized Report Presets

Editing Time In/Out or Adding Notes to Time Events

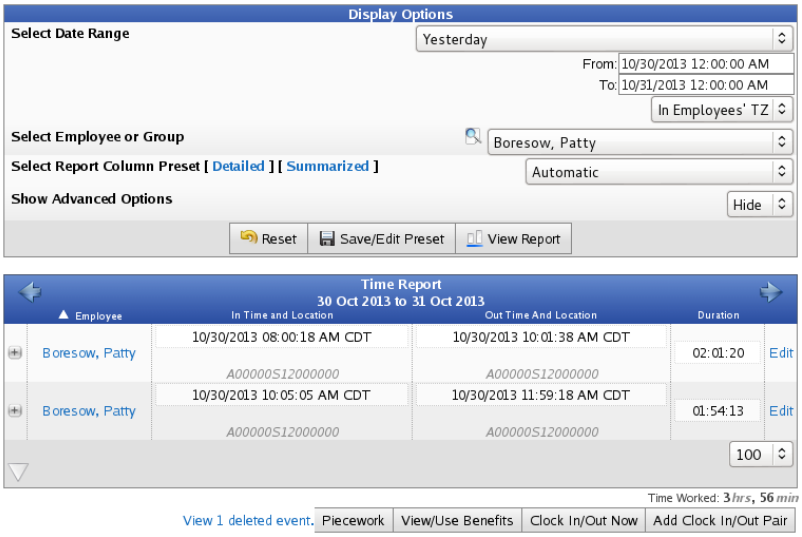
You can view and edit an employee's time through the employee's Time/Edit report.

Using the left pane Main Menu » Administration, click on: Reports » Time Edit/Report

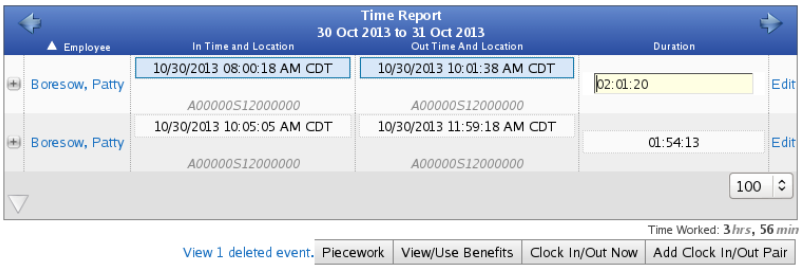


- Generate the report to include the employee's time you wish to view or edit. (See the **Time Edit/Report article** for step-by-step instructions.)

In the example below, we are looking at Patty's time for yesterday.

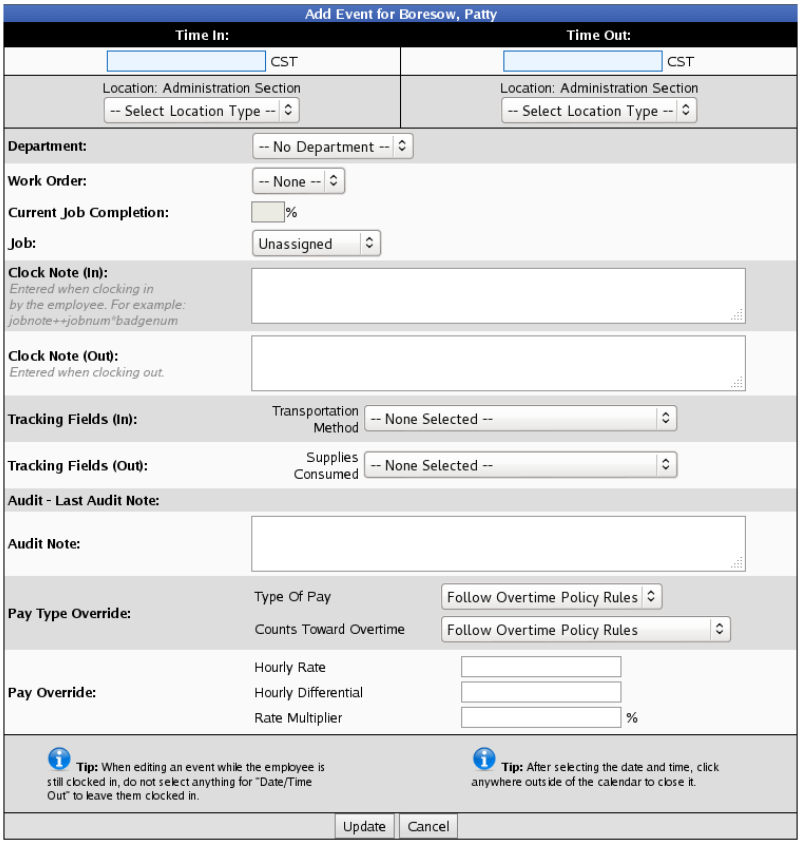


- The **In Time**, **Out Time**, and **Duration** fields are edit-in-place. Just click in the box and type over the existing date and time.



- Employees can be clocked in or out real time by clicking the **Clock In/Out Now** button.
- A clock in/out pair can be added by clicking the **Add Clock In/Out Pair** button. This brings up the TIme Report control panel.

Time Report

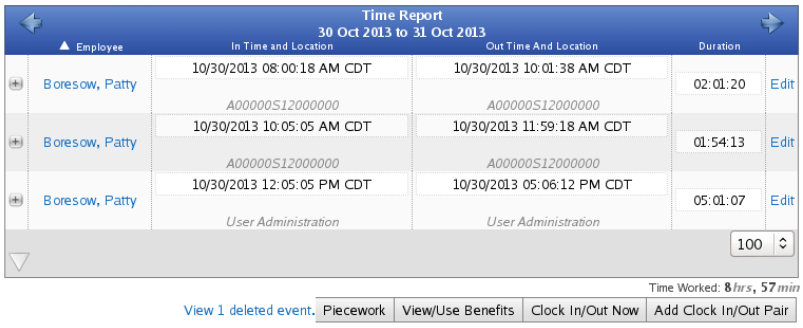


- Click in the **Time In** and **Time Out** fields and use the drop down calendar and/or just type in the date and time.
- The **Department**, **Work Order**, **Job**, or other **Tracking Fields** associated with this clock event can also be specified here.

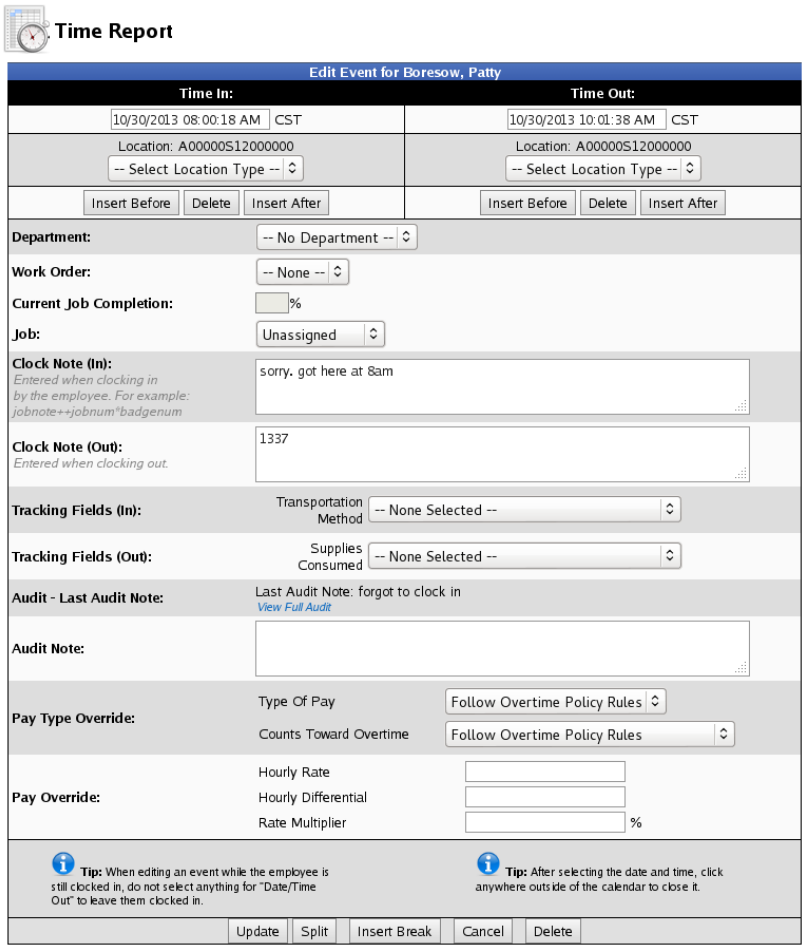
NOTE: Pay Type Override and Pay Override sections (shown) require optional IPSOTO module.

- Click on the **Update** button to save and add the clock event.

Edit Time Event



- Clicking **Edit** will take you to the Time Edit interface where the clock can be modified or even deleted.



1. Click in the **Time In** or **Time Out** field that needs to be edited or corrected.
2. Adjust the Time In and/or Time Out by typing over the date and time or by using the calendar that pops up automatically when you click in the date/time field.
3. You may also change/select a Job, enter Notes, and edit custom remote clocking field values, if applicable.

TIP: Enter an explanation of the edit in the "Audit Note" section for auditing purposes.

WARNING: If there are any current or past pending payrolls, the time edit may invalidate the payroll run and require you to enter an explanation for invalidating the payroll. This security feature ensures that you are aware and agree to adjust information that may affect a generated payroll file.

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4. Click on the **Update** button to save the adjustment(s).

NOTE: Manual time adjustments are automatically audited with the editor's name, time of adjustment, and original Time In or Out. A flag displays to the right of the Time In/Out pair identifying it as an adjusted time event. Click on the flag to view the audit and Change Notes.

IPSOTO module Pay Type Override and Pay Override

TimeIPS IPSOTO module includes overtime options, including allowing a manual override on pay type and pay rate for individual time events.

Option	Function
Type of Pay	Select to force a pay-type regardless of hours worked or overtime policy. Generally used to force special time to be overtime or doubletime, for example work done outside of normal business hours.
Counts Toward Overtime	Select to include or not include this time for the calculation of worked hours in a day or worked hours in a week for the purposes of trigger daily/weekly qualification for overtime, doubletime and/or premium time. Generally used for paid breaks where the time on break will not be counted toward the 40 hours in a week required to go into overtime.
Hourly Rate	Force an hourly rate for this work. Leave blank to follow employee/job pay rate, if set.
Hourly Differential	Force an hourly differential for this work. Leave blank to follow job differential, if set.
Rate Multiplier	Force a rate multiplier for this work. Leave blank to follow employee/job multiplier, if set.

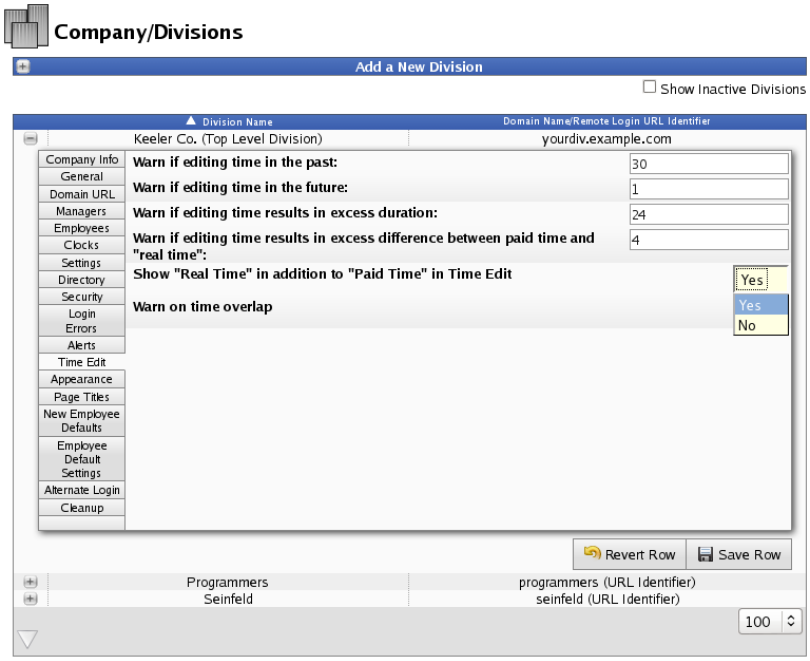
Pay Override Note: Normally, **only set one** of the three Pay Override options. If multiple options are set, they will be calculated in order: Hourly Rate, Hourly Differential and Rate Multiplier. Example: If the hourly rate is $10.00, with a differential of $2.00 and a rate multiplier of 150%, then the actual pay will be $10.00 +$ 2.00 = $12.00 * 150% = $18.00. This is true for values set here and/or from jobs, or employee rate settings.

The Pay Type Override and Pay Override set here are given **top priority**, and if set, will override pay and pay-types set per employee, per job, per overtime policy calculations, or elsewhere in the system.

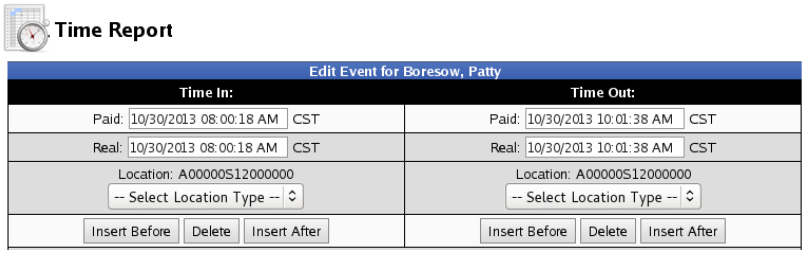
Real Time tracking (in addition to paid time)

TimeIPS provides a way to track "Real Time" in addition to the regular "Paid Time." By default, only Paid Time displays on the Time Edit page. To also view Real Time, Time Tracking needs to be turned on through the Company/Divisions section of System menu.

Using the left pane Main Menu » Administration, click on: System » Company/Divisions



- Click on the **+** (plus) sign to the left of the Division you wish to show Real Time.
- Click on the **Time Edit** tab.
- Choose "Yes" to **Show "Real Time" in addition to "Paid Time" in Time Edit**.
- Click the **Save Row** button to save the change.
- Return to Time Edit to view a clock event's Paid Time vs Real Time.



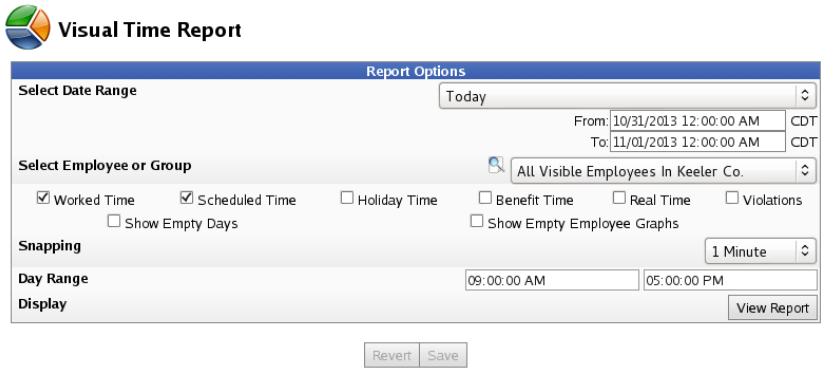
TimeIPS actually tracks three different times for each clock event:

- Paid Time: The paid time for clocking in/out is used to generate reports and payroll. This time can be adjusted by rounding, snapping, manual edits or other schedule-based modification. *When using IPSDBRO, paid time is stored in the adjTimeIn and adjTimeOut fields.*
- Real Time: The real time is the time the employee actually clocked in or out. The real time does not have any adjustments such as rounding or snapping applied. The real time can be edited if the division-wide option to see real time when editing is turned on. This allows tracking the time an employee was on site vs. when the employee was working. This can be useful in an audit or when trying to ensure that rounding or other adjustments have been fair over a long period of time. *When using IPSDBRO, real time is stored in the realTimeIn and realTimeOut fields.*
- Creation Time: This is the time that the time in/out was created. When an employee actually clocks, this is likely to be the same as the real time, and could be the same or nearly the same as the paid time. In cases where time is manually inserted, this creation time could be hours or days different than the paid or real time. *When using IPSDBRO, creation time is stored in the timeIn and timeOut fields.*

Visual Time Report

The Visual Time Report shows worked time in a visual presentation along with other relevant data such as schedule, benefit time, holiday time, real time, schedule violations, etc.. The Visual Time Edit module (IPSVTE) is required.

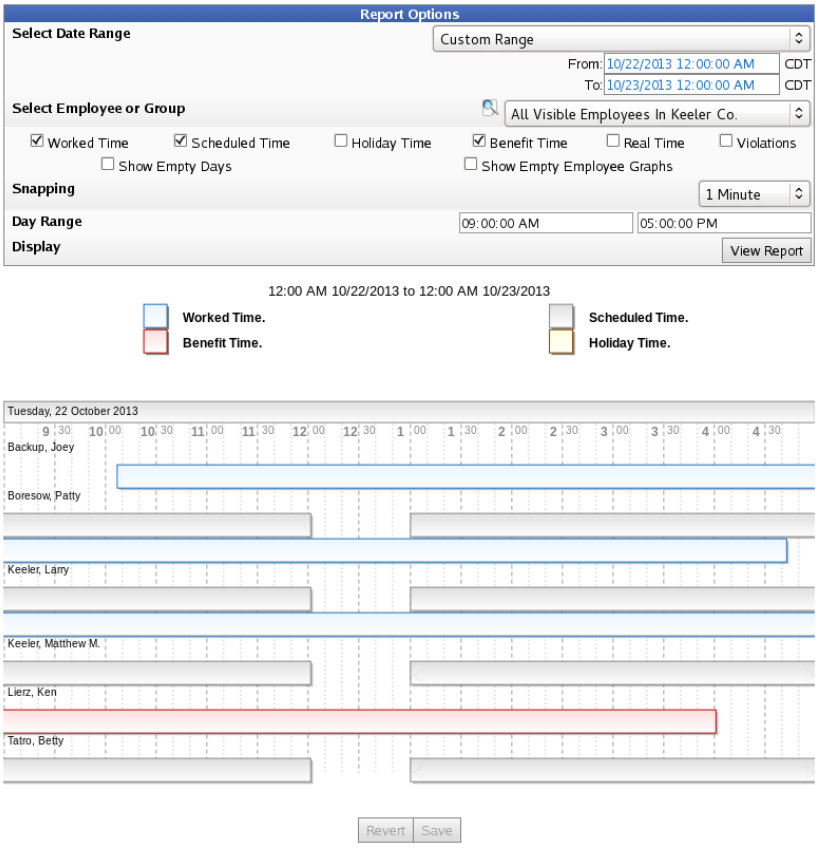
Using the left pane Main Menu » Administration, click on: Reports » Visual Time Report



- **Select Date Range:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- **Select Employee or Group.** Use this selector to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

NOTE: Selecting a group such as a Job group will limit this report to all of the Employees who are associated with that job, but will not filter results to time worked in that job. The Advanced Options can be used to set up these limits and filters.

- To include **Worked Time**, **Scheduled Time**, **Holiday TIme**, **Benefit TIme**, **Real Time**, and **Violations**. check the box next to that selection.
- To **Show Empty Days** or to **Show Empty Employee**, click the box next to that selection.
- Decided if time **Snapping** should be enabled or disabled.
  - To disable Snapping, choose "No Snapping" from the drop down menu.
  - To enable, choose an amount of time from the drop down menu. This time determines the amount of movement is allowed will editing ranges of time from the Visual Report.
- Enter a **Day Range** that is relevant to your data, such as "8AM to 5PM" to view time and schedules for first-shift employees.
- Click the **View Report** button to display the report below.



On the Visual Report, the bars represent spans of time.

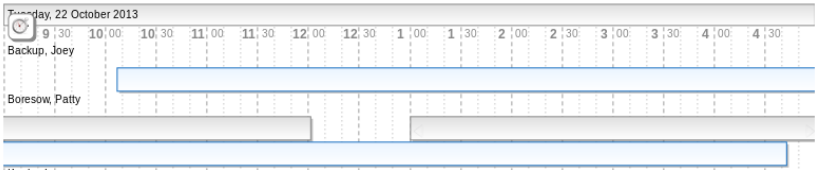
Edit a Time Event

If the span of time is fully contained within the **Day Range** set, the time spans can be altered.

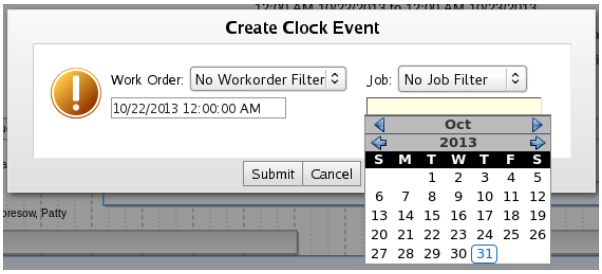
- Click the center of a bar and drag to **move** it.
- Click the edge of a bar and drag to **lengthen** or **shorten** the span of time.

Add a Time Event

- Click on the person's name. An image of a clock appears.



- Click on the clock image to bring up the **Create Clock Event** window.



- To add the **Work Order** and/or **Job**, click on the drop down menu and make your selection.
- To add a **Clock In** and **Out**, click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.

- Click the **Submit** button to save.

Audit Report

The Audit Report shows all edits and automated changes to time events for a selected span of time.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
Schedules Per-Hour	Shows employee schedules, per hour, on a weekly basis.
Schedule Violations	Shows early/late schedule violations.
Tardy Report	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by setting a required arrival time.
Tardy Report by Schedule	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

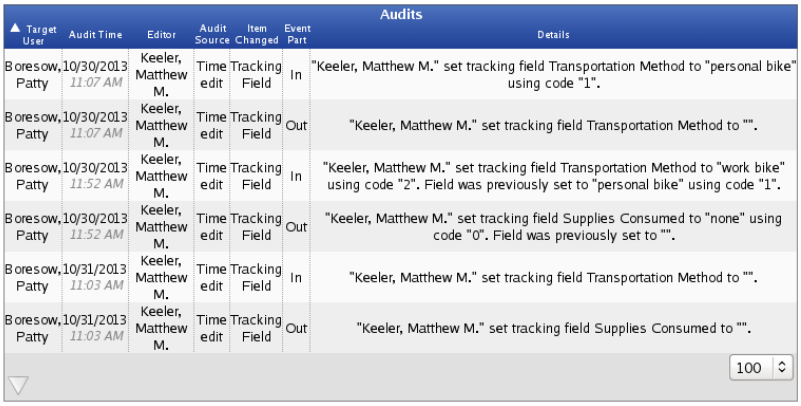
Under Clocking, click on: Audit Report

Special Reports

- **Select a Report Range:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- Choose to **Show audits** "Made ON the selected employees" or "Made BY the selected employees".
- Find the **Selected Employees** you would like to see in the report.

NOTE: Selecting a group such as a Job group will limit this report to all of the Employees who are associated with that job, but will not filter results to time worked in that job. The Advanced Options can be used to set up these limits and filters.

- Choose whether to **Show for**: Clock In, Clock Out, or Event.
- From the drop down menu, choose which sourse to **Show audits created by.**
- From the drop down menu, choose what to **Show audits affecting.**
- Click the **Submit** button to display the report below.



Audits

Target User	Audit Time	Editor	Audit Source	Item Changed	Event Part	Details
Boresow, Patty	10/30/2013 11:07 AM	Keeler, Matthew M.	Time edit	Tracking Field	In	"Keeler, Matthew M." set tracking field Transportation Method to "personal bike" using code "1".
Boresow, Patty	10/30/2013 11:07 AM	Keeler, Matthew M.	Time edit	Tracking Field	Out	"Keeler, Matthew M." set tracking field Transportation Method to "".
Boresow, Patty	10/30/2013 11:52 AM	Keeler, Matthew M.	Time edit	Tracking Field	In	"Keeler, Matthew M." set tracking field Transportation Method to "work bike" using code "2". Field was previously set to "personal bike" using code "1".
Boresow, Patty	10/30/2013 11:52 AM	Keeler, Matthew M.	Time edit	Tracking Field	Out	"Keeler, Matthew M." set tracking field Supplies Consumed to "none" using code "0". Field was previously set to "".
Boresow, Patty	10/31/2013 11:03 AM	Keeler, Matthew M.	Time edit	Tracking Field	In	"Keeler, Matthew M." set tracking field Transportation Method to "".
Boresow, Patty	10/31/2013 11:03 AM	Keeler, Matthew M.	Time edit	Tracking Field	Out	"Keeler, Matthew M." set tracking field Supplies Consumed to "".

100

Employee Summary Report

The Employee Summary Report shows distribution of worked time by job in a graphical format.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

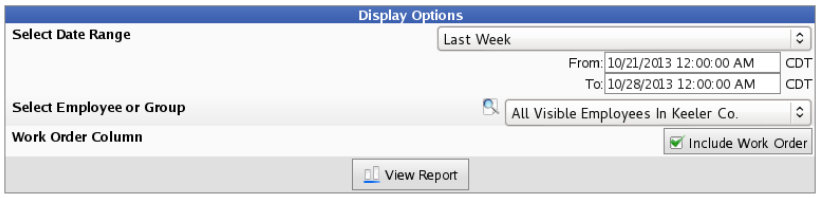
Special Reports

Special Reports	
Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
Schedules Per-Hour	Shows employee schedules, per hour, on a weekly basis.
Schedule Violations	Shows early/late schedule violations.
Tardy Report	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by setting a required arrival time.
Tardy Report by Schedule	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Clocking, click on: Employee Summary Report

Employee Summary Report



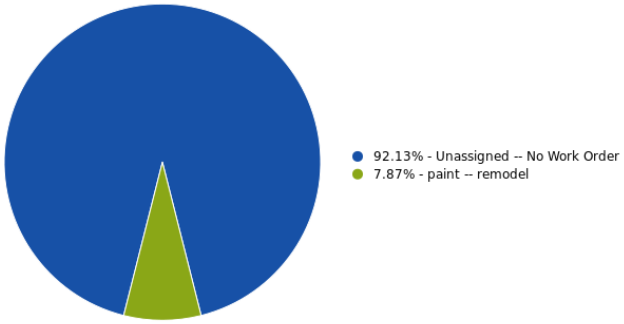
- **Select Date Range:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- **Select Employee or Group.** Use this selector to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

NOTE: Selecting a group such as a Job group will limit this report to all of the Employees who are associated with that job, but will not filter results to time worked in that job. The Advanced Options can be used to set up these limits and filters.

- To include the **Work Order Column**, check the "Include Work Order" box.
- Click the **View Report** button to display the report below.

Employee Summary Report For All Employees In Keeler Co.

From 10/21/2013 12:00:00 AM CDT to 10/28/2013 12:00:00 AM CDT



Daily/Weekly Summary	
Days In Range	7.00
Days Worked	5
Average Per Day Worked	24.57 hours
Weeks In Range	1.00
Weeks Worked	1
Average Per Week Worked	122.85 hours

Job Percentage Summary

Job Name	Time Worked	Percentage of Total
Unassigned -- No Work Order	113:10:51	92.13%
paint -- remodel	09:40:05	7.87%
Total	**122:50:56**	**100%**

Days are 12am to 12am.

Weeks start on Monday at 12 am.

NOTE: The pie chart can have up to 10 slices. If you have more than 10 categories, the 9 largest will appear individually and the 10th slice will be called "Other", containing all other categories.

Missing Clockout Report

The Missing Clockout Report provides a weekly view of employees who have not clocked out or who clocked out too late. The time when employees are expected to be clocked out can be set separately for weekdays and weekend days.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
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Audit Report	Shows all edits and automated changes to time events for a selected span of time
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Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
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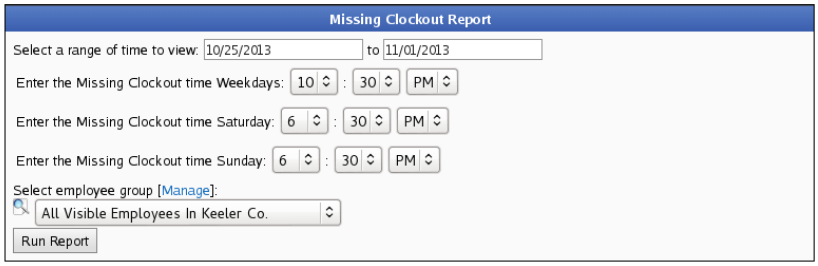
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Clocking, click on: Missing Clockout Report

Special Reports



- **Select a range of time to view:** Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date.
- **Enter the Missing Clockout time** for Weekdays, Saturday, and Sunday
- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

  NOTE: The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.

- Click the **Run Report** button.

Prev Period	Period of Oct, 25 2013 through Nov, 01 2013	Next Period

Name	Friday 10/25/2013	Saturday 10/26/2013	Sunday 10/27/2013	Monday 10/28/2013	Tuesday 10/29/2013	Wednesday 10/30/2013	Thursday 10/31/2013	Friday 11/01/2013
Backup, Joey	Clocked On Time	Absent	Absent	Absent	Late Clockout (1.5000H)	Late Clockout (1.5000H)	Clocked On Time	---
Boresow, Patty	Sick	Absent	Absent	Absent	Clocked On Time	Clocked On Time	Absent	---
Keeler, Larry	Absent	Absent	Absent	Absent	Absent	Absent	Absent	---
Keeler, Matthew M.	Absent	Absent	Absent	Absent	Absent	Absent	Absent	---
Lierz, Ken	Absent	Absent	Absent	Absent	Absent	Absent	Absent	---
Lierz, Whitney	Absent	Absent	Absent	Absent	Absent	Absent	Absent	---
Tatro, Betty	Absent	Absent	Absent	Absent	Absent	Absent	Absent	---
Wolf, Hannah	Absent	Absent	Absent	Absent	Absent	Absent	Absent	---
Wolf, Jad	Absent	Absent	Absent	Absent	Absent	Absent	Absent	---

If employees are clocked in past the expected clock out time, the Missed or Late Clockout status will be highlighted in red with the excess hours appearing below it.

To jump back or forward a week, click **Prev Period** or **Next Period** respectively.

Site Summary Report

The Site Summary report summarizes hours worked by employees during a calendar week, grouped by site.

Modules Required: IPSRPT Custom Reporting and IPSSITE Site Management

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
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Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Clocking, click on: Site Summary

Special Reports

Back

Site Summary Report

The following days begin and end at 12:00 AM in the company time zone.
Important: The site summary report only includes payable hours from completed work days. Hours worked on incomplete days will not be calculated.
Note: If no clock data in the reporting period corresponds to a site, the report will be an empty.

Select a report range: Current (incomplete) calendar week (Mon to Sun)

Select employee group [Manage]: All Visible Employees In Keeler Co.

Template uploaded:

Upload new template: Browse... No file selected.

Minimum employee rows: 1

Include summary page

Run Report

- **Select a report range** from the drop down menu. You can choose from the Current calendar week, the Last calendar week, or a Selected date. Choosing "Selected date" will populate a field to select a specific date on which the report will start. The report always covers a span of exactly seven days.

  NOTE: The Site Summary report uses calendar days starting at midnight in the company time zone.

- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list. The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.
- If you have never uploaded a **Template**, or if you wish to use a modified template, select an OpenDocument spreadsheet file (.ods) to upload.

  TIP 1: Sample templates can be downloaded from support.timeips.com in the download section.

  TIP 2: The last-used template will stay in the system. Only upload a template if you need to change it.

- Specify the number of rows reserved for employee data in the template in **Minimum Employee Rows**. The report will insert additional rows into the template beyond this number if necessary.
- Click on the **Run Report** button

Generating Report

The report you have requested is being generated. The status of this report is printed below. When the report is complete, it will be presented at this screen or you will be prompted to download it.

Checking status ...

Sample Report

	A	B	C	D	E	F	G	H	I
1	**Site:**	Summary					**Report Range:**	10/21/2013 - 10/27/2013	
2									
3	**Employee**	**10/21/2013**	**10/22/2013**	**10/23/2013**	**10/24/2013**	**10/25/2013**	**10/26/2013**	**10/27/2013**	**Week Total**
4	**Total:**	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

The report produces an OpenDocument spreadsheet with one sheet for each site. Each page summarizes the hours worked at the site based on the client station, remote clocking IP address, or telephone clocking caller ID at which the employees clocked in.

NOTE: If you have no sites configured in TimeIPS, or if there is no clock data in the selected report associated with sites, the spreadsheet will be empty.

See "Making a Template" below for programs that can read OpenDocument spreadsheets. You can find sample templates in the downloads section. Simple template. or Complex template.

Making a Template

The Site Summary report uses the OpenDocument spreadsheet file format. OpenOffice.org is the supported software for editing OpenDocument files.

TIP: TimeIPS recommends OpenOffice.org for editing OpenDocument files, but there are other alternatives available. These options are not supported by TimeIPS technical support but may be useful for your organization.

- **Google Docs is capable of importing and exporting small OpenDocument spreadsheets using a web interface.**
- **There are plugins available for Microsoft Office (2003 and higher) which add support for OpenDocument files. (Sun Plugin | Community Plugin)**
- **KOffice is available for users of Linux or other UNIX-like operating systems.**

A template is an OpenDocument spreadsheet that contains specially formatted tags. When the report is run, these tags are replaced with the desired values. There should only be one row in the template that contains tags for employee records. This row will be repeated for each employee with worked hours in the report. The "Minimum Employee Rows" setting determines how many rows may be overwritten in the template (including the row containing the tags) before additional rows are inserted. If the spreadsheet uploaded into TimeIPS has more than one sheet, only the first sheet is used.

Per-Site Tags

Tag	Replacement
{SITENAME}	Site Name
{SITECODE}	Site Code
{DAY[#]}	Date for specified day, in 01/01/2007 format
{DAY(*format*)[#]}	Date for specified day, with a user-provided format (format codes)
{ST_ALL}	Total standard time hours worked at site
{ST_ALL[#]}	Total standard time hours worked at site on specified day
{OT_ALL}	Total overtime hours worked at site
{OT_ALL[#]}	Total overtime hours worked at site on specified day
{DT_ALL}	Total doubletime hours worked at site
{DT_ALL[#]}	Total doubletime hours worked at site on specified day
{HOURS_ALL}	Total hours worked at site
{HOURS_ALL[#]}	Total hours worked at site on specified day

Per-Employee Tags

Tag	Replacement
{FIRSTNAME}	First Name
{MIDNAME}	Middle Name
{LASTNAME}	Last Name
{PREFNAME}	Preferred Name
{FULLNAME}	Full Name (see Master Configuration)
{ST}	Total standard time hours worked by employee
{ST[#]}	Total standard time hours worked by employee on specified day
{OT}	Total overtime hours worked by employee
{OT[#]}	Total overtime hours worked by employee on specified day
{DT}	Total doubletime hours worked by employee
{DT[#]}	Total doubletime hours worked by employee on specified day
{HOURS}	Total hours worked by employee
{HOURS[#]}	Total hours worked by employee on specified day

NOTE for tags with [#]: These tags refer to data for a specific day. Replace the # with the number of days after the start of the report; 0 means the first day of the report, and 6 means the last day.

When using tags in a spreadsheet formula, it may be necessary to enclose the tags in quotation marks (i.e. "{ST}" instead of just {ST}) to prevent the spreadsheet application from changing the content of the tag while editing the template. These quotes will be removed by the Site Summary report.

NOTE: Your spreadsheet program may show error messages, like "#NAME?" or "Err:502". These errors are caused by the fact that template tags are not valid in formulas. If the formulas are otherwise correct, these errors will be resolved when the report is run.

TIP: To preserve number formatting, use a simple spreadsheet formula like ="{ST}" instead of using {ST} alone.

Work Order Report

The Work Order report shows jobs worked on selected work orders.

Module Required: Real-Time Work Order Tracking (IPSJWO).

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
Schedules Per-Hour	Shows employee schedules, per hour, on a weekly basis.
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Tardy Report	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by setting a required arrival time.
Tardy Report by Schedule	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Clocking, click on: Work Order Report

Special Reports

Back

Work Order Report

The following days begin and end on the employee's work day boundary as defined by the employee's workweek group.

Select a Work Order:	-- No Work Order --
Select a report range:	Selected date range
Enter the start date for the report:	10/26/2013 02:11 PM
Enter the end date for the report:	11/01/2013 02:11 PM
Select employee group [Manage]:	All Visible Employees In Keeler Co.
Show Work Orders with no worked time:	Yes

Run Report

- **Select a Work Order** from the drop down list, or leave it at "No Work Order" to view clock events without a work order.
- **Select a report range** from the drop down menu. You can choose from the Last completed calendar week, the Current (incompete) calendar week, or a Selected date range. If "Selected date range" is chosen, then also **Enter the start** and **end date for the report.** The report always covers a span of exactly seven days.

NOTE: Days included in the "calendar week" options, begin and end on the employee's work day boundary as defined by the employee's workweek group.

- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.
- If the report should **Show Work Orders with no worked time**, select "Yes". Otherwise, select "No".
- Click on the **Run Report** button.

Work Order Activity for remodel:

Work Order Code: 001, Customer
Start Date: 2014-01-08, Due Date: Not set

sheet rock
(44)

Budgeted Hours:

Date/Time	Employee	Worked Time	Completed
There is no work order activity for the selected time range.			

paint
(33)

Budgeted Hours:

Date/Time	Employee	Worked Time	Completed
2013-10-21 07:41:03	Boresow, Patty	9.67	30%
Total:		**9.67**	**30%**

Default Job Report

The TimeIPS Default Job Report provides a way to see employees who are not working on their default job.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

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Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Employee Information, click on: Default Job Report

Default Job Coverage Report

- Optionally, **Select an employee's presets for this page**.
  - Select the employee from the drop down list.
  - From the next drop down list, select that employee's preset.

NOTE: A new preset can also be added by clicking the "Save Preset" button and saved as the default by clicking the "Make Default" button.

- Select a **Report Time** on which the report will start.
- **Select Employees** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.
- To **Honor schedule group default jobs**, check the adjacent box. Otherwise, leave it unchecked.
- Click on the **Run Report** button.

As of 11/01/2013 04:07 AM:

Default Job Coverage Report		
▲ Employee	Default Job	Status
Boresow, Patty	paint	Clocked Out
Keeler, Larry	sheet rock	Clocked Out
Lierz, Ken	sheet rock	Clocked Out

100

The default job report will only list employees who have a default job or; if selected, the default schedule group job and if they are currently clocked out, or clocked into a job other than their default job. It will not show employees who do not have a default job set, or employees who are clocked into their default job.

Employee Report Card

The Employee Report Card provides a quick snapshot of an employee's performance for the month to date, the last quarter, the year to date and the previous year. The report also shows the employees last review and pay increase (if tracked). It lists the total number of benefit hours used by benefit type, absences, tardies, and total number of labor hours broken down by standard hours, overtime and double time (if applicable).

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
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Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Employee Information, click on: Employee Report Card

- From the drop down menu, select the employee for whom you would like to run the Report card
- Click on the **Run Report** button

Employee Report card

Employee Name
Boresow, Patty
Start Date
11/17/2011
Employment Duration
1 Years 11 Months 22 Days
Last Review
Not yet reviewed
Last Pay Change
By : Unknown Amount : When : Never

Used Benefit Time					
Benefit Name	**Month To Date**	**Last Month**	**Last Quarter**	**Year to Date**	**Last Year**
Sick	-	3h	-	3h	-
Vacation	-	-	-	-	-

Schedule Report					
	Month To Date	**Last Month**	**Last Quarter**	**Year to Date**	**Last Year**
Early Clock In Errors	-	-	-	-	-
Early Clock In's	-	2	-	2	-
Clocked In On Time	-	1	1	2	-
Tardy Clock In's	1	3	-	4	-
Average Early Clock In	-	0m	-	0m	-
Average Tardy Clock In	24m	55m	-	47m	-
Average Schedule Deviation	Late: 29m	Late: 19m	Late: 2m	Late: 18m	0m
Days Absent	5	16	19	40	-
Not Scheduled	4	8	71	264	366

Labor Hours					
Type	**Month To Date**	**Last Month**	**Last Quarter**	**Year to Date**	**Last Year**
Doubletime	-	-	-	-	-
Overtime	-	-	-	-	-
Standardtime	-	27.3019h	-	27.3019h	-
Unclassified	4.27h	20.57h	540.0369h	564.8769h	-

- You can now see the entire **Employee Report Card** with the employee's photo id included (if they have been uploaded under the **Employee Administration** section).

Early Clock In Errors:
These occur whenever an employee clocks in more than 24 hours prior to the scheduled time and stays clocked in through the beggining of the schedule.
Early/Tardy Clock In's:
When an employee clocks in before/after the "allowable minutes" defined in their schedule.
Clocked In On Time:
Any clock during the "allowable minutes" period defined in the employee schedule.
Average Early/Tardy Clock In:
Takes the average time an employee clocked in prior/after the "allowable minutes", for example if an employee can clock up to 5 min after 8AM and they clock in late at 8:12AM then 7 minutes would be used to calculate the average tardy time since it was 7 minutes after the allowable 5.
Average Schedule Deviation:
Shows the average of ALL early, ontime and late clocks. This is a good indicator of when employees clock in on average.

Management Hierarchy Report

The Management Hierarchy report provides a quick way to see a hierarchical view of employees that report to other employees in an organization.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
Schedules Per-Hour	Shows employee schedules, per hour, on a weekly basis.
Schedule Violations	Shows early/late schedule violations.
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Tardy Report by Schedule	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Employee Information, click on: Management Hierarchy

Extra Fields			
☐	Title	☐	Organizational Unit
☐	Badge Number	☐	Alt Number
Display Options			
☐	Show Inactive		
View			

- Backup, Joey
- Keeler, Matthew M.
  - Keeler, Larry
  - Tatro, Betty
  - Wolf, Jad
- Lierz, Whitney
  - Boresow, Patty
  - Lierz, Ken
  - Wolf, Hannah

- A list of all the active employees will display.
- To **Show Inactive** employees, check that box.
- Click on the **View** button.

Extra Fields			
☐	Title	☑	Organizational Unit
☑	Badge Number	☐	Alt Number
Display Options			
☐	Show Inactive		
View			

- Backup, Joey, Family, 1008
- Keeler, Matthew M., Administration, 1000
  - Keeler, Larry, Family, 1003
  - Tatro, Betty, Family, 1002
  - Wolf, Jad, Friends, 1006
- Lierz, Whitney, Administration, 1001
  - Boresow, Patty, Family, 1005
  - Lierz, Ken, Family, 1004
  - Wolf, Hannah, Friends, 1007

- To include employees' **Title**, **Organizational Unit**, **Badge Number**, and/or **Alt Number**, check the appropriate box(es).
- Click on the **View** button.

Absentee Report

The Absentee Report summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
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Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
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Tardy Report by Schedule	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.
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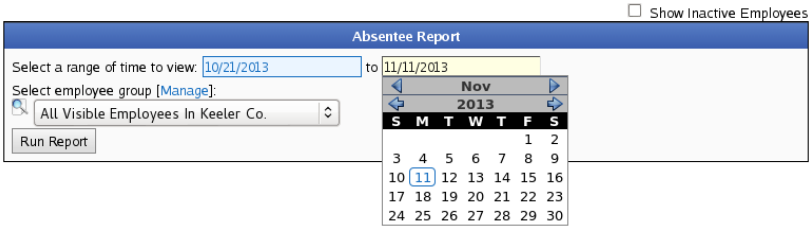
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

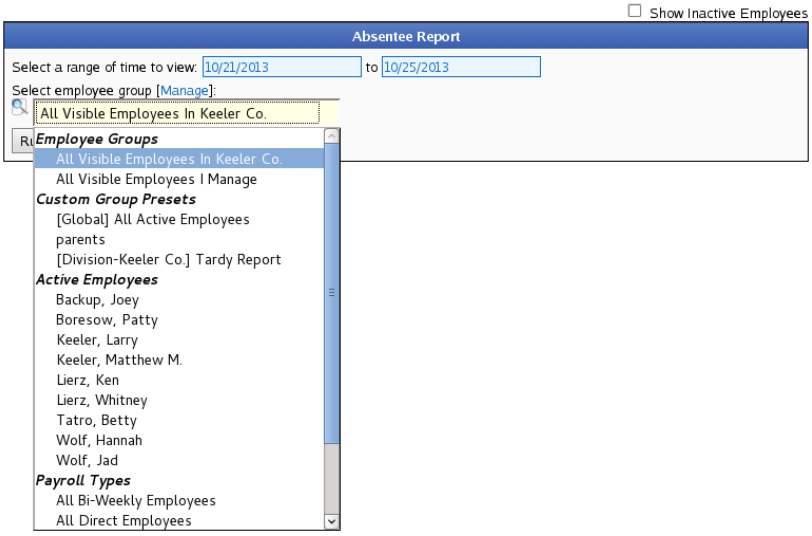
Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Absentee Report

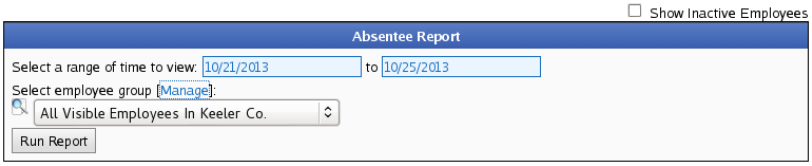
1. **Select a range of time to view** from the drop-down calendars or type over the date displayed.



2. **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list. The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.



3. Click on the **Run Report** button.



Absentee Report

Back

Prev Period	Period between Oct, 21 2013 and Oct, 25 2013	Next Period

Name	Monday 10/21/2013	Tuesday 10/22/2013	Wednesday 10/23/2013	Thursday 10/24/2013	Friday 10/25/2013	
Backup, Joey	7.3369	23.7061	8.5050	Absent	9.1506	48.70
Boresow, Patty	9.6681	9.4506	8.6842	9.1672	3.0000*	39.97
Keeler, Larry	9.0006	9.1675	9.0100	8.0022*	Absent	35.18
Keeler, Matthew M.	8.5169	9.0003	8.0003	12.0003	8.5169	46.03
Lierz, Ken	24.0000*	16.0000*	Absent	9.0025	9.0028	58.01
Lierz, Whitney	8.0058	Absent	9.0017	Absent	Absent	17.01
Tatro, Betty	8.5014	8.7506	8.8753	9.9378	9.9378	46.00
Wolf, Hannah	2.6672	4.2500	3.2503	2.2503	3.2503	15.67
Wolf, Jad	Absent	Absent	Absent	Absent	Absent	0.00

Days reporting time with an asterisk contain sick/holiday/other benefit time.

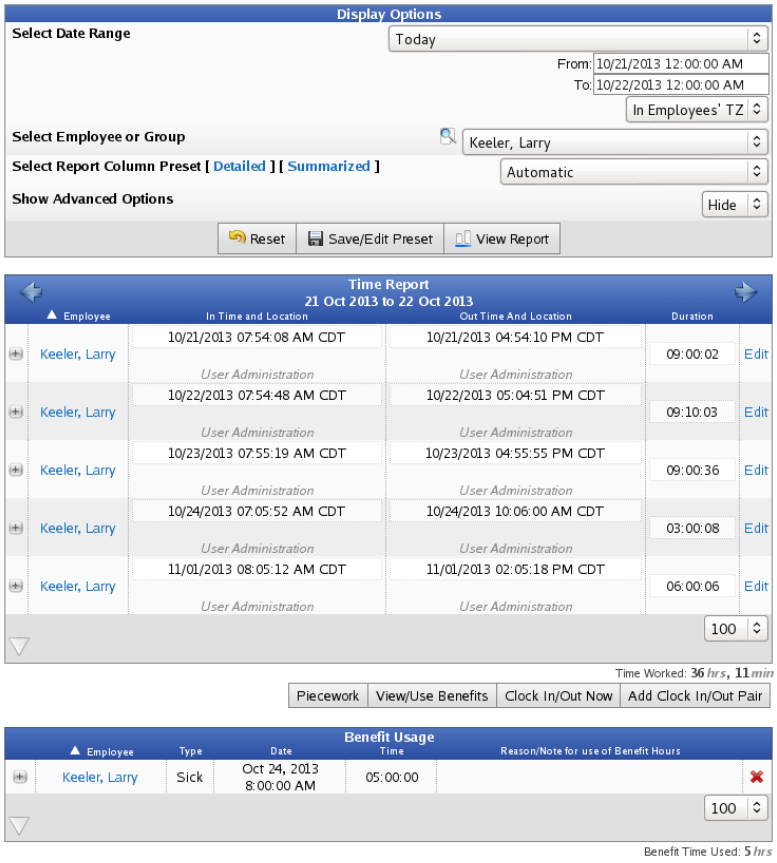
- To jump back or forward a time period, click **Prev Period** or **Next Period** respectively.

- To return to the Special Reports page and run the Absentee Report again, click on blue **Back** button, then select the Absentee Report link.

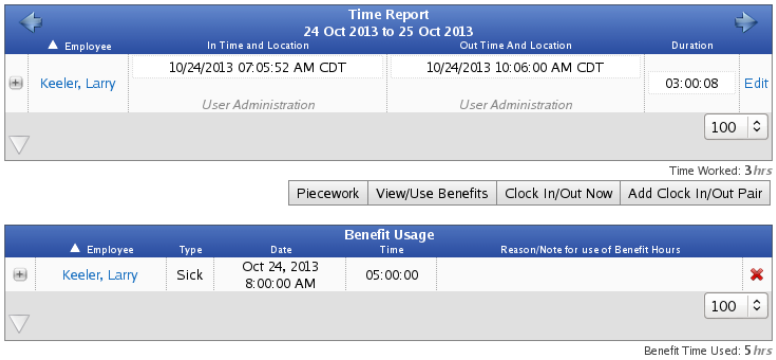
NOTE: Time Worked displays as decimal hours, rounded to the 4th decimal place. Minutes are converted to decimal hours by dividing the minutes worked by 60.

NOTE: An asterisk next to the hours worked on the Absentee Report indicates that the employee used benefit time (such as sick, vacation, etc.) on that day.

- Click on the employee's name within the report and the system will automatically open the **Time Edit Report** in a new tab for that employee showing the entire time range as the **Absentee Report.**



- Click on a specific numerical time listing within the report and the system will open a new tab with the **Time Edit Report** showing just that specific date for that employee.



Attendance Hours Report

The TimeIPS Attendance Hours Report provides a way to see employee attendance of hours compared to scheduled time.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
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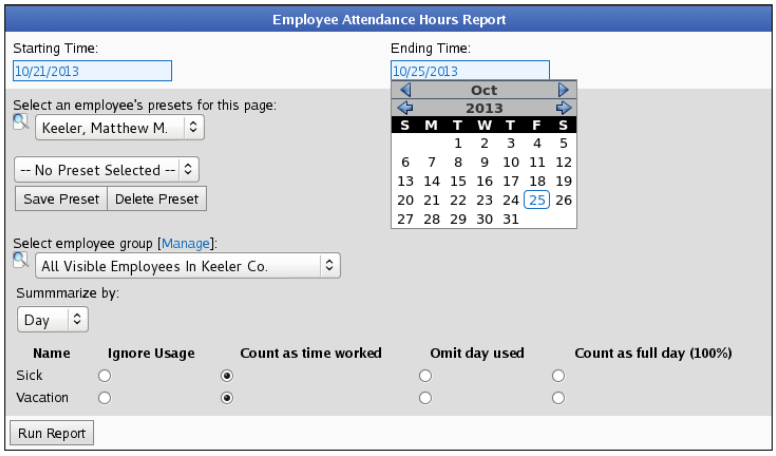
Schedule Violations	Shows early/late schedule violations.
Tardy Report	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by setting a required arrival time.
Tardy Report by Schedule	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Attendance Hours

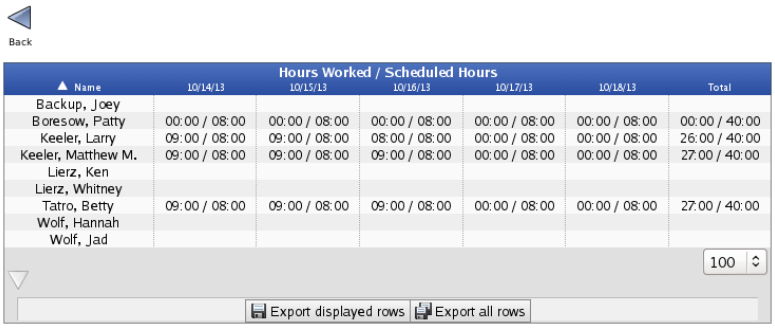


- Select a **Starting Time** and an **Ending Time** for the time range that should be included in the report. Either pick the dates from the drop-down calendars or type over the date displayed.
- Optionally, **Select an employee's presets for this page**.
  - Select the employee from the drop down list.
  - From the next drop down list, select that employee's preset.

NOTE: A new preset can also be added by clicking the "Save Preset" button and saved as the default by clicking the "Make Default" button.

- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list. The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.
- Choose to either **Summarize by:** Day or Month.
- For **Sick** and **Vacation** time, choose whether to 'Ignore Usage', 'Count as time worked', 'Omit day used', or 'Count as full day (100%)'.
- Click on the **Run Report** button.

Attendance Hours Report



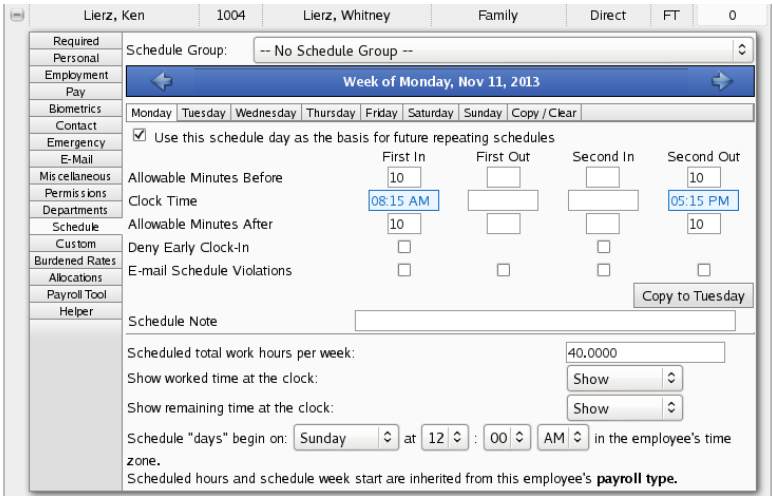
The hours and minutes worked within the scheduled time will be displayed.

- To run another Attendance Hours Report, click on the blue **Back** button at the top left.
- To export this report, click the grey triangle at the bottom left, then click either the **Export displayed rows** or the **Export all rows** button.

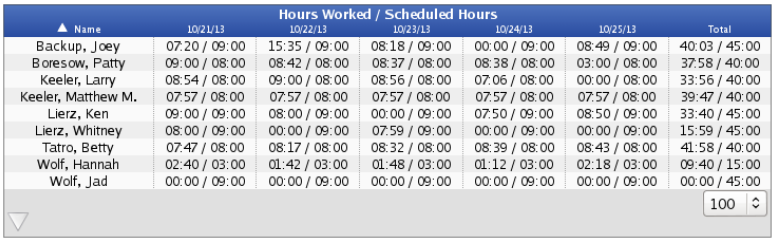
NOTE: If an employee worked but thre is no data shown on the Attendance Hours Report, check to see if that employee has been assigned a Schedule.

Using the left pane Main Menu » Administration, click on: Employees » Employees » Schedule tab

---



After adding **Schedules**, rerun the **Attendance Hours Report** to include the additional data.



Attendance Percentage Report

The Attendance Percentage Report provides a quick way to see time employees have worked vs the time they were scheduled.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
Schedules Per-Hour	Shows employee schedules, per hour, on a weekly basis.
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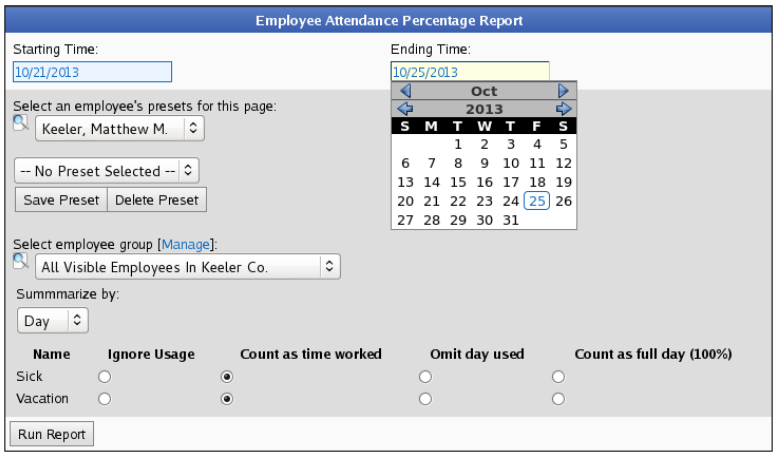
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

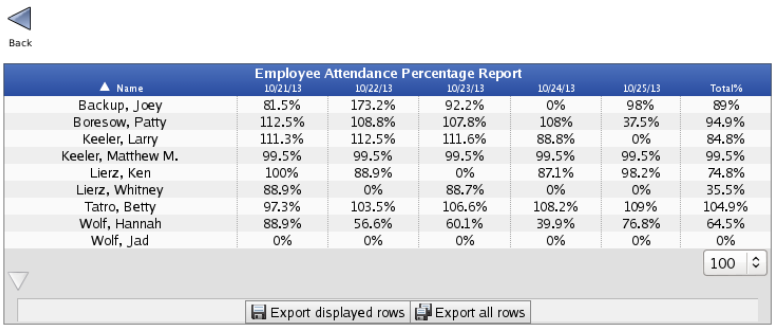
Under Schedules, click on: Attendance Percentage



- Select a **Starting Time** and an **Ending Time** for the time range that should be included in the report. Either pick the dates from the drop-down calendars or type over the date displayed.
- Optionally, **Select an employee's presets for this page**.
  - Select the employee from the drop down list.
  - From the next drop down list, select that employee's preset.

  NOTE: A new preset can also be added by clicking the "Save Preset" button and saved as the default by clicking the "Make Default" button.
- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list. The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.
- Choose to either **Summarize by:** Day or Month.
- For **Sick** and **Vacation** time, choose whether to 'Ignore Usage', 'Count as time worked', 'Omit day used', or 'Count as full day (100%)'.
- Click on the **Run Report** button.

Attendance Percentage Report



For the calculation, time worked during a lunch break adds to the total hours, allowing percentages over 100%. Time worked outside the schedule is excluded, so an employee could be scheduled for 8 hours (8am to 4pm) and works 8 hours (9am to 5pm) would NOT have 100% coverage, because of the missing hour (8am to 9am).

- To run another Attendance Percentage Report, click on the blue **Back** button at the top left.
- To export this report, click the grey triangle at the bottom left, then click either the **Export displayed rows** or the **Export all rows** button.

NOTE: If an employee worked but thre is no data shown on the Attendance Percentage Report, check to see if that employee has been assigned a Schedule.

Using the left pane Main Menu » Administration, click on: Employees » Employees » Schedule tab

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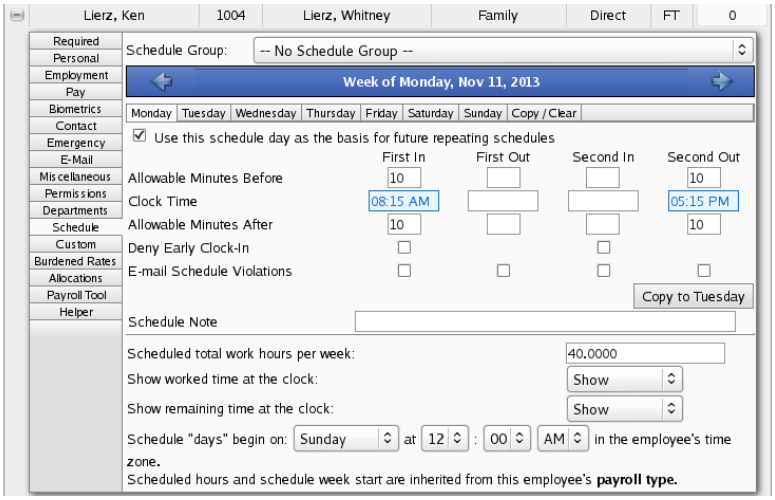

- After adding **Schedules**, rerun the **Attendance Percentage Report** to include the additional data.

Break Violation Report

The Break Violation Report allows quick identification of employees without a sufficient break in a selectable period of time.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
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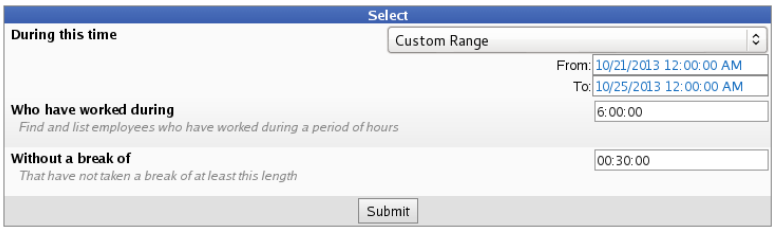
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Break Violation Report



- **During this time:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- **Who have worked during:** Specify in hours the amount of time employees worked that should have resulted in a break.

NOTE: The number of hours worked is from each clock-in, collectively. It does NOT require consecutive work time.

- **Without a break of**: Specify the length of the minimum required break.
- Click on the **Submit** button.

Break Violation Report

Select	
During this time	Custom Range
	From: 10/21/2013 12:00:00 AM
	To: 10/25/2013 12:00:00 AM
Who have worked during	6:00:00
Without a break of	00:30:00
Submit	

The Following Employees may be in violation

- Backup, Joey starting 07:47 AM 10/23/2013
- Boresow, Patty starting 08:21 AM 10/24/2013
- Keeler, Matthew M. starting 09:02 AM 10/24/2013
- Lierz, Ken starting 09:09 AM 10/24/2013
- Lierz, Whitney starting 09:01 AM 10/23/2013
- Tatro, Betty starting 08:20 AM 10/24/2013
- Wolf, Hannah starting 10:48 AM 10/24/2013

Schedules Per-Hour Report

The Schedules Per-hour report provides a quick way to see employees who are scheduled to work on an hour-by-hour basis.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
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Tardy Report	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by setting a required arrival time.
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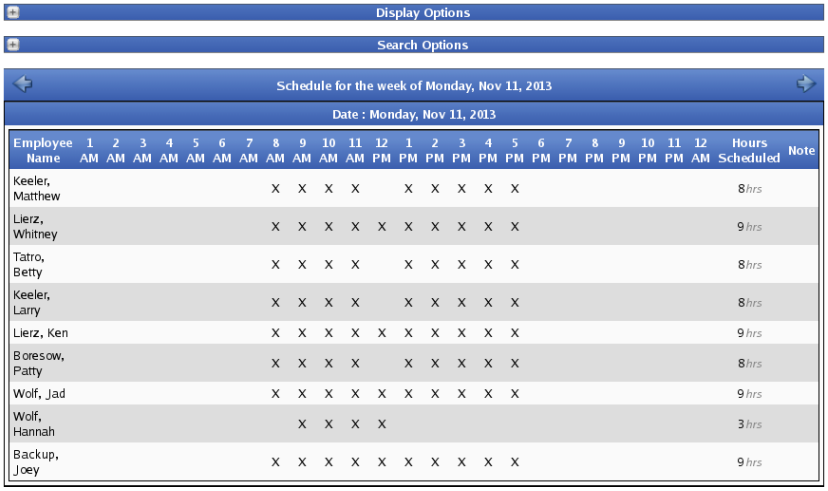
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

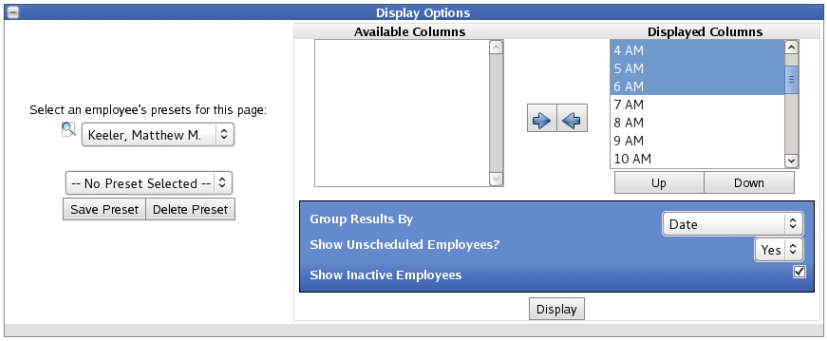
Under Schedules, click on: Schedules Per-Hour



Employee Name	1 AM	2 AM	3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	11 PM	12 AM	Hours Scheduled	Note
Keeler, Matthew								X	X	X	X		X	X	X	X	X								8 hrs	
Lierz, Whitney								X	X	X	X	X	X	X	X	X	X								9 hrs	
Tatro, Betty								X	X	X	X		X	X	X	X	X								8 hrs	
Keeler, Larry								X	X	X	X		X	X	X	X	X								8 hrs	
Lierz, Ken								X	X	X	X	X	X	X	X	X	X								9 hrs	
Boresow, Patty								X	X	X	X		X	X	X	X	X								8 hrs	
Wolf, Jad								X	X	X	X	X	X	X	X	X	X								9 hrs	
Wolf, Hannah									X	X	X	X													3 hrs	
Backup, Joey								X	X	X	X	X	X	X	X	X	X								9 hrs	

- By default, the current week's schedule is displayed.
  - To view the PREVIOUS WEEK's schedule, click the blue arrow in the top left corner.
  - To view the NEXT WEEK's schedule, click the blue arrow in the top right corner.

Display Options



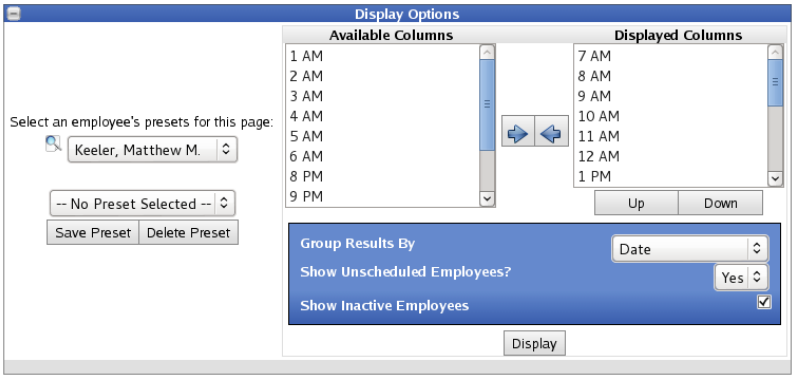
- Optionally, **Select an employee's presets for this page**.
  - Select the employee from the drop down list.
  - From the next drop down list, select that employee's preset.

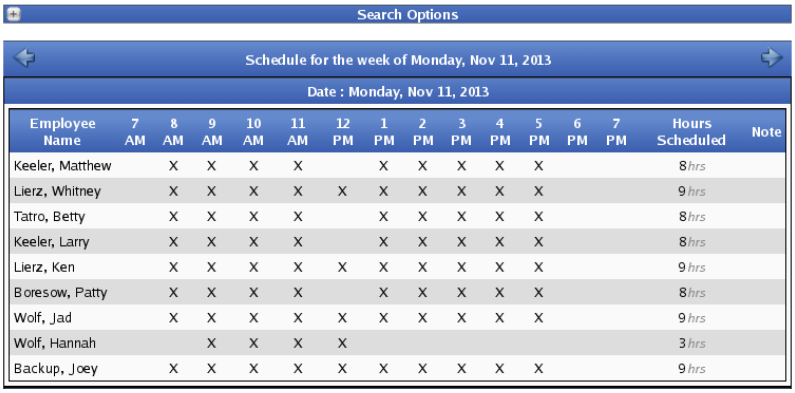
NOTE: A new preset can also be added by clicking the "Save Preset" button and saved as the default by clicking the "Make Default" button.

- To NARROW the **Displayed Columns** , click on the hours (in the Displayed Columns list) to exclude, then click the arrow pointing left. This moves them to the **Available Columns** list.
- To EXPAND the **Displayed Columns**, click on the hours (in the Available Columns list) to include, then click the arrow pointing right. This moves them to the **Displayed Columns** list.

TIP: You can select multiple items to move by holding down the CTRL key while clicking on the individual fields. All the selected fields will be highlighted. You can select multiple consecutive items by holding down the SHIFT key while clicking on the first and last item in the sequence.

- Choose to **Group Results By** either Date, Note, Manager or Organizational Unit.
- To **Show Unscheduled Employees**, leave it on Yes, otherwise choose No.
- To **Show Inactive Employees**, check the corresponding box.
- Click the **Display** button to see the customized Schedule Per-Hour report.





Employee Name	7 AM	8 AM	9 AM	10 AM	11 AM	12 PM	1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	Hours Scheduled	Note
Keeler, Matthew		X	X	X	X		X	X	X	X	X			8 hrs	
Lierz, Whitney		X	X	X	X	X	X	X	X	X	X			9 hrs	
Tatro, Betty		X	X	X	X		X	X	X	X	X			8 hrs	
Keeler, Larry		X	X	X	X		X	X	X	X	X			8 hrs	
Lierz, Ken		X	X	X	X	X	X	X	X	X	X			9 hrs	
Boresow, Patty		X	X	X	X		X	X	X	X	X			8 hrs	
Wolf, Jad		X	X	X	X	X	X	X	X	X	X			9 hrs	
Wolf, Hannah			X	X	X	X								3 hrs	
Backup, Joey		X	X	X	X	X	X	X	X	X	X			9 hrs	

Search Options

- To filter the report, enter a value in the **Full Name**, **ID/Badge**, and/or **Note** field(s).

  NOTE: Use the * (asterisk) as a wildard. Fields left blank will not be used in filtering the list.

- Click the **Search** button to see the filtered Schedule Per-Hour report.

Schedule Violations Report

The Schedule Violations report provides a quick way to see employees who have either an early or late violation to their scheduled work time.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
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Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
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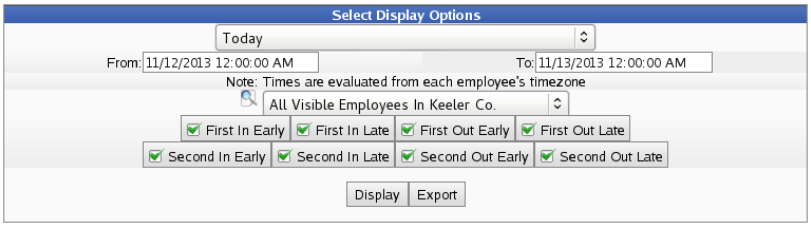
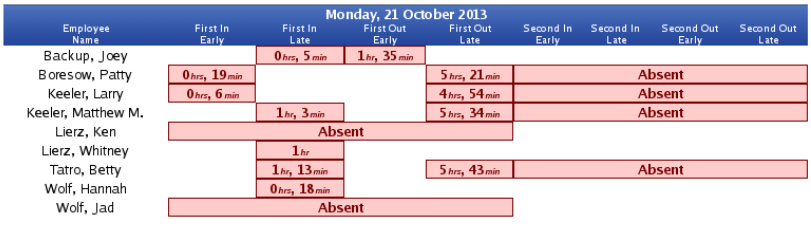
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Schedule Violations



- **Select Date Range:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- To filter **which employees** will appear in the report, select an individual employee or group from the drop-down menu. This works in conjunction with Employee Selection Groups, and your custom presets will appear in this list.
- To include an **early or late clock in/out**, check the box next to that violation. To exclude it, uncheck the box.
- Click the **Display** button to see the report below.



- Click the **Export** button to export and view the report in a spreadsheet program such as OpenOffice.

	A	B	C	D	E	F
1	Schedule Violations for All Employees In Keeler Co. 10/21/2013 12:00:00 AM to 10/22/2013 12:00:00 AM					
2	**Employee Name**	**Day**	**First In Early**	**First In Late**	**First Out Early**	**First Out Late**
3	Backup, Joey	2013-10-21		0:05:01	1:34:46	
4	Boresow, Patty	2013-10-21	0:18:57			5:21:08
5	Keeler, Larry	2013-10-21	0:05:52			4:54:10
6	Keeler, Matthew M.	2013-10-21		1:02:31		5:33:32
7	Lierz, Ken	2013-10-21	*Absent*	*Absent*	*Absent*	*Absent*
8	Lierz, Whitney	2013-10-21		0:59:55		
9	Tatro, Betty	2013-10-21		1:13:08		5:43:13
10	Wolf, Hannah	2013-10-21		0:18:04		
11	Wolf, Jad	2013-10-21	*Absent*	*Absent*	*Absent*	*Absent*

Tardy Report

The Tardy Report shows Tardy, On-Time and Absent employees. Tardy status is determined by setting a required arrival time.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
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Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
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Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
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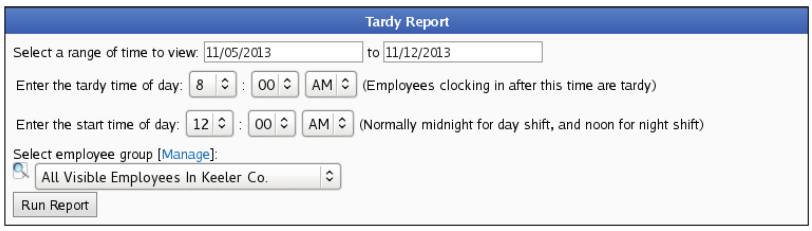
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Tardy Report



- **Select a range of time to view:** Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date.
- **Enter the tardy time of day** (Employees clocking in after this time are tardy.)
- **Enter the start time of day** (Normally midnight for day shift, and noon for night shift.)

- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

  NOTE: The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.

- Click the **Run Report** button.

Tardy Report

Prev Period	Period between Oct, 21 2013 and Oct, 22 2013		Next Period
Name	**Monday 10/21/2013**	**Tuesday 10/22/2013**	**Total**
Backup, Joey	Tardy	On Time	1
Boresow, Patty	On Time	On Time	0
Keeler, Larry	On Time	On Time	0
Keeler, Matthew M.	Tardy	Tardy	2
Lierz, Ken	Vacation	Vacation	0
Lierz, Whitney	Tardy	Absent	1
Tatro, Betty	Tardy	Tardy	2
Wolf, Hannah	Tardy	Tardy	2
Wolf, Jad	Absent	Absent	0
Total Tardy	5	3	8

- To scroll through different periods, use the **Prev Period** and **Next Period** links at the left and right of the date range. (For example, if you have 2 days showing, clicking Prev Period will jump back to the previous 2 days.)
- To run another Tardy Report, click on the blue **Back** arrow icon at the top left.

NOTE: Days when benefit time was taken are indicated by the type (i.e., "Sick", "Bereavement", etc.) of benefit used.

TIP: To ensure benefit usage appears on the Tardy Report, enter the benefit time to correspond with the employee's work schedule (i.e., the employee's work day begins at 8:00am, enter the benefit time to begin at 8:00am). The employee's work schedule is set up on their Schedule tab in Employee Administration.

See Also:
Tardy Report
Manage Employee Selection Groups
Approvals Report

Tardy Report by Schedule

The Tardy Report by Schedule is a weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
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Employee Report Card	Employee Report Card / Review Tracking
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Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
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Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
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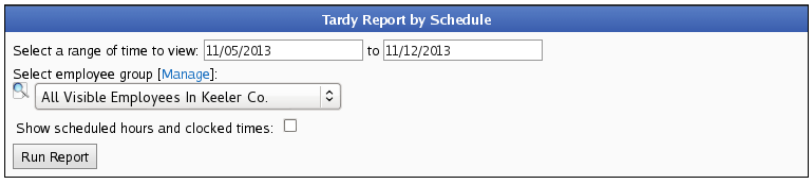
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Tardy Report by Schedule



- **Select a range of time to view:** Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date.
- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

NOTE: The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.

- Click the **Run Report** button.

Tardy Report by Schedule

Back

Prev Period	Period between Oct, 21 2013 and Oct, 23 2013	Next Period

Name	Monday 10/21/2013	Tuesday 10/22/2013
Backup, Joey	On Time	Early
Boresow, Patty	Piecework	Early
Keeler, Larry	Early	Early
Keeler, Matthew M.	Tardy	Tardy
Lierz, Ken	Vacation	Vacation
Lierz, Whitney	Tardy	Absent
Tatro, Betty	Tardy	Tardy
Wolf, Hannah	On Time	Tardy
Wolf, Jad	Absent	Absent

- To scroll through different periods, use the **Prev Period** and **Next Period** links at the left and right of the date range. (For example, if you have 2 days showing, clicking Prev Period will jump back to the previous 2 days.)
- To run another Tardy Report, click on the blue **Back** arrow icon at the top left.

NOTE: Days when benefit time was taken are indicated by the type (i.e., "Sick", "Bereavement", etc.) of benefit used.

TIP: To ensure benefit usage appears on the Tardy Report, enter the benefit time to correspond with the employee's work schedule (i.e., the employee's work day begins at 8:00am, enter the benefit time to begin at 8:00am). The employee's work schedule is set up on their Schedule tab in Employee Administration.

Approvals Report

The Approvals Report shows detailed information about Timesheet Approvals.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
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Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Miscellaneous, click on: Approvals

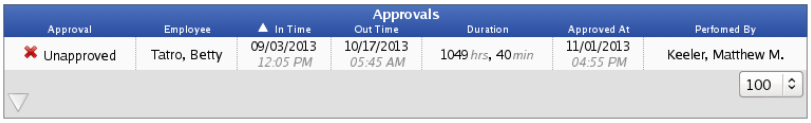
- **Select a Report Range:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- Choose to **Apply Date Filter To** either the Date of Event or the Date of Approval.
- Choose to **Show approvals** for either the "time worked by the selected employees" or "made by the selected employees".
- **Select Employees** to be included in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

NOTE: The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.

- Choose to **Show for** either Approvals, Unapprovals, or Forced Approvals..
- Click the **Submit** button.

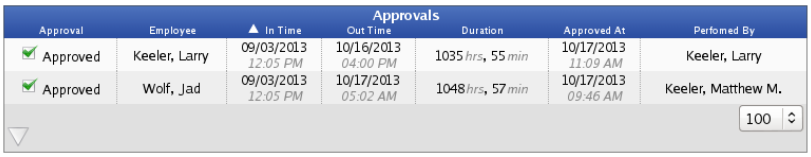
Approvals Report

Showing for Unapprovals.



Approvals Report

Showing for Approvals.



- To export a report and view it in a spreadsheet based program (such as OpenOffice), click on the grey arrow on the bottom left. Then either click the **Export displayed rows** or the **Export all rows** button.

See Also:
Manage Employee Selection Groups
Timesheet Approval Options
Timesheet Approvals

End of Week Mailer

The End of Week Mailer is a special report that re-sends the end-of-week report for any week to selected employees. The report includes standard time, overtime, double-time and benefit information for the employee's payroll week. This report can be configured to be sent to up to three e-mail addresses of your choosing at the end of each payroll week. These e-mails addresses are set-up in the e-mail tab of Employee Administration.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
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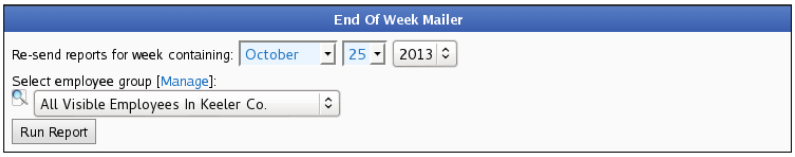
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: End of Week Mailer



- **Re-send reports for week containing:** Select a date from the drop-down lists. The report will run the work week that includes this date.
- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.

NOTE: The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.

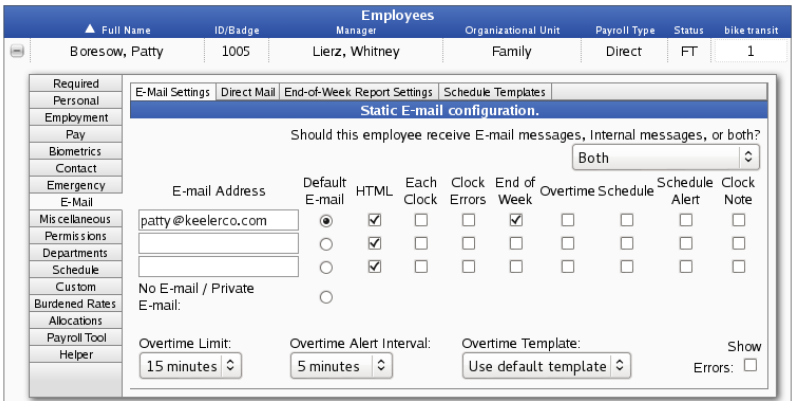
- Click the **Run Report** button to re-send the End of Week Mailer to the e-mail address assigned to receive "End of Week" reports for the selected employee(s). You will be presented with a message stating that the e-mail(s) have been sent and/or if there was a problem that prevented the report(s) from being sent.

Sending end of week e-mails...

Sending report for Keeler, Matthew M.... 1 emails have been queued.
Sending report for Lierz, Whitney... 1 emails have been queued.
Sending report for Tatro, Betty... 1 emails have been queued.
Sending report for Keeler, Larry... 1 emails have been queued.
Sending report for Lierz, Ken... 1 emails have been queued.
Sending report for Boresow, Patty... 1 emails have been queued.
Sending report for Wolf, Jad... 1 emails have been queued.
Sending report for Wolf, Hannah... 1 emails have been queued.
Sending report for Backup, Joey... no emails to send.

End of week e-mails sent.

NOTE: Employees must have an e-mail address entered in the e-mail tab of Employee Administration and End of Week notifications must be selected (as shown below).



- The identified e-mail address will receive an e-mail copy of the selected employee's End of Week report that includes standard time, overtime, double-time, and benefit usage information (as shown below).

NOTE: You can choose to include or hide benefit data from the End of Week report using the End-of-week Report Options on the employee's E-mail tab in Employee Administration.

Time and benefit report for the workweek from 10/20/2013 12:00 AM CDT to 10/27/2013 12:00 AM CDT of Boresow, Patty.

Timecard			
Time In	Time Out	Job	Time Worked
Mon, Oct 21st 07:41am CDT	Mon, Oct 21st 05:21pm CDT	paint	9hrs, 40min
Tue, Oct 22nd 07:15am CDT	Tue, Oct 22nd 04:42pm CDT	---	9hrs, 27min
Wed, Oct 23rd 08:22am CDT	Wed, Oct 23rd 05:03pm CDT	---	8hrs, 41min
Thu, Oct 24th 08:21am CDT	Thu, Oct 24th 05:31pm CDT	---	9hrs, 10min
		Weekly Total:	36hrs, 58min

Benefits			
Date	Type	Notes	Hours Used
10/25/2013 08:00 AM GMT CDT	Sick		3hrs
		Benefits Total:	3hrs
		Benefit and Work Time Total:	39hrs, 58min

End-of-Week Benefit Status				
Benefit Type	Total Earned	Total Used	Total Lost	Available
Sick	219hrs, 23min	3hrs	0hrs	216hrs, 23min
Vacation	193hrs, 50min	0hrs	0hrs	193hrs, 50min

Hours Worked This Work Week			
Standard	Overtime	Doubletime	Total
27hrs, 18min	0hrs	0hrs	27hrs, 18min

NOTE: The timeframe shown on the End of Week report is based on the employee's workweek group, as defined in Administration » Payroll and Reports » Workweek Groups. The End of Week report will begin on the same day of the week as the employee's assigned workweek group (ie., if the employee's workweek group begins on Wednesday, the End of Week report will begin on Wednesday).

NOTE: Reports that are run on the current date will include clock times up to the previous fully completed work day, but will not include the current work day.

Sign-off Report

The Sign-off Report a printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.

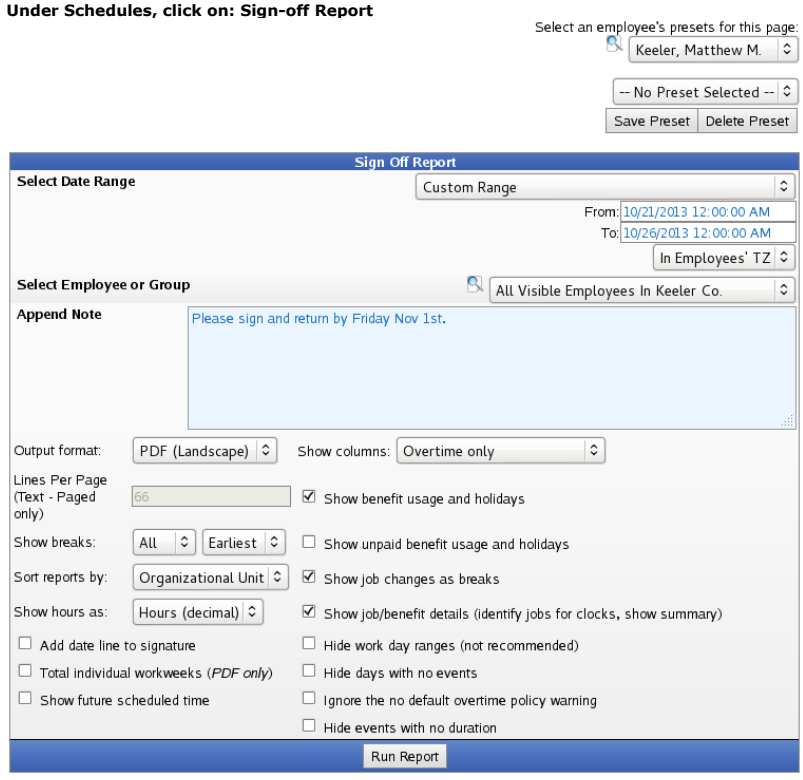
Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
Schedules	
Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
Break Violation Report	Shows all employees who have worked without taking a sufficient break.
Schedules Per-Hour	Shows employee schedules, per hour, on a weekly basis.
Schedule Violations	Shows early/late schedule violations.
Tardy Report	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by setting a required arrival time.
Tardy Report by Schedule	A weekly report showing Tardy, On-Time and Absent employees. Tardy status is determined by each employee's schedule.
Miscellaneous	
Approvals	Shows detailed information about Timesheet Approvals.
Custom Report	Generate a report based on custom payroll export settings and templates
End of Week Mailer	Re-sends the end-of-week report for any week to selected employees.
Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Sign-off Report



- (Optional) **Select an employee's presets for this page**.
  - Select the employee from the drop down list.
  - From the next drop down list, select that employee's preset.

NOTE: A new preset can also be added by clicking the "Save Preset" button and then saved as the default by clicking the "Make Default" button.

- **Select Date Range:** Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- **Select Employee or Group** to include in the report. This works in conjunction with Employee Selection Groups. You can customize which employees to include in a preset group on the Selection Groups page.
- (Optional) Enter any custom text you wish to display below each employee's time in the **Append note** field.
- Select an **Output format** from the following four options:
  - PDF (Landscape)
  - PDF (Portrait)
  - Text (paged)
    - For Text - Paged only, choose how many **Lines Per Page**.
  - Text (continuous)
- Choose how to **Show breaks**.
  First choose how many breaks to show:
  - None
  - 1
  - 2
  - All

  Then choose what kind:
  - Earliest
  - Longest
- Choose to **Sort reports by** either:
  - Employee
  - Organizational Unit
- Choose to **Show hours as** one of the following formats:
  - Hours (decimal)
  - HH:MM
  - HH:MM:SS
- Check the **Add date line to signature** box to include the date.
- Check the **Total individual workweeks** box to display the total for each work week.
- Check the **Show future scheduled time** box to have the future scheduled time show as worked time.

NOTE: The selected Date Range must include a future date.

- Select which **Overtime**, **Doubletime**, or **Premium Time** columns to show. The options provided are:
  - Overtime only
  - Overtime and Doubletime
  - OT, DT, and Premium Time
- Check the **Show benefit usage and holidays** box to include them in the report.
- Check the **Show unpaid benefit usage and holidays** box to include them in the report.
- Check the **Show job changes as breaks** to include job changes.

EXAMPLE: When an employee switches jobs, TimeIPS clocks them Out of their first job and immediately In to the new job. If the "Show job changes as breaks" option is unchecked, the added Out and new In time will not display on the report.

- Check the **Show job/benefit details (identify jobs for clocks, show summary)** box to identify jobs for clocks. If the employee clocked into a specific job, it will show the Job Code under the clock in event and will provide a summary of the hours worked for each job at the bottom of the report.
- Check the **Hide work day ranges** box to prevent the start and end times of each work day from displaying. (This is not recommended because the employee's work day and the calendar day may not necessarily coincide.)
- Check the **Hide days with no events** box to only include days with events.
- Check the **Ignore the no default overtime policy warning** box to supress the warning.
- Check the **Hide events with no duration** box to exclude events without a duration.
- Click on the **Run Report** button to view the report.

NOTE: TimeIPS allows you to define an employee's "Work Day" and "Work Week" for determining overtime so you are not locked into a calendar day for these calculations. Therefore, each employee's work day is listed on the report along with any clock events during that period and how the hours will be paid out (regular, over, or doubletime).

Sign-off Report: PDF (Landscape) version

In the EXAMPLE below, the options chosen were:
- Output format: PDF (Landscape)
- Show breaks: All / Earliest
- Sort reports by: Organizational Unit
- Show hours as: Hours (decimal)
- Show columns: Overtime only
- Show benefit usage and holidays
- Show job changes as breaks
- Show job/benefit details (identify jobs for clocks, show summary)

Boresow, Patty **Organizational Unit:** Family **Badge #:** 1005 **Alternate ID #:** 1005

Day Start - Day End	Clock In	Clock Out	Std	Over	Ben
10/21/13 - 10/22/13 12:00 AM 12:00 AM	10/21/13 7:41 AM 33	10/21/13 5:21 PM	0.00	0.00	9.67
10/22/13 - 10/23/13 12:00 AM 12:00 AM	10/22/13 7:15 AM	10/22/13 4:42 PM	9.45	0.00	0.00
10/23/13 - 10/24/13 12:00 AM 12:00 AM	10/23/13 8:22 AM	10/23/13 5:03 PM	8.68	0.00	0.00
10/24/13 - 10/25/13 12:00 AM 12:00 AM	10/24/13 8:21 AM	10/24/13 5:31 PM	9.17	0.00	0.00
10/25/13 - 10/26/13 12:00 AM 12:00 AM	10/25/13 8:00 AM Sick	10/25/13 11:00 AM	0.00	0.00	3.00
			27.30	0.00	12.67
				Total:	39.97

Employee Signature: _____ Approved by: _____

WorkOrder	Job	Code	Std	Ovr
remodel	paint	33	0.00	0.00

Please sign and return by Friday Nov 1st.

NOTES:

- **Job codes appear under the Clock In event when an employee clocks into a specific job. The standard, overtime and doubletime hours are then summarized by job at the bottom of the report.**
- **Time Worked displays as decimal hours, rounded to the 2nd decimal place. Minutes are converted to decimal hours by dividing the minutes worked by 60.**
- **Time events shown in red indicate clock errors, schedule deviations, or some other type of alert. See the the employee's Time Report for more information.**
- **Time events shown in italics indicate clock events that cross the start or end of the report time/workday. The times shown in italics are the break times, and are NOT actual clock times.**

Sign-off Report: Text version

This EXAMPLE has all the same selections as the PDF version above, but is displayed in Text output format.

```
Organizational Unit: Family              GENERATED: 2013/11/13 09:17 AM CST
Boresow, Patty                           Badge: 1005        Alt. Emp#: 1005
-------------------------------------------------------------------
Day Start - Day End  | IN        OUT       REG    OT     BEN
=====================+=======================================
 10/21/13 - 10/22/13 | 10/21/13  10/21/13    0.00   0.00   9.67
 12:00 AM   12:00 AM |  7:41 AM   5:21 PM
                     | 33
 10/22/13 - 10/23/13 | 10/22/13  10/22/13    9.45   0.00   0.00
 12:00 AM   12:00 AM |  7:15 AM   4:42 PM
                     |
 10/23/13 - 10/24/13 | 10/23/13  10/23/13    8.68   0.00   0.00
 12:00 AM   12:00 AM |  8:22 AM   5:03 PM
                     |
 10/24/13 - 10/25/13 | 10/24/13  10/24/13    9.17   0.00   0.00
 12:00 AM   12:00 AM |  8:21 AM   5:31 PM
                     |
 10/25/13 - 10/26/13 | 10/25/13  10/25/13    0.00   0.00   3.00
 12:00 AM   12:00 AM |  8:00 AM  11:00 AM
                     | Sick
                                          ---------------------
                                            27.30   0.00  12.67
                                                  Total:  39.97
Job            Code          REG    OT
-----------------------------------------
paint          33              0.00   0.00

Please sign and return by Friday Nov 1st.
```

Worked Months Report

The Worked Months Special Report shows the hours that each employee has worked during each month of the year.

NOTE: You can also view a subtotal of time worked by employee for a specified date range by running a Time Report for a group of employees. See the Time Edit/Reports section.

Using the left pane Main Menu » Administration, click on: Reports » Special Reports

Special Reports

Special Reports	
▲ Report Name	Description
Clocking	
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Report	Distribution of worked time by job in graphical format.
Missing Clockout Report	Shows employees who have not clocked out at a set time each day
Site Summary	A one-week summary of hours worked, grouped by site
Work Order Report	Shows jobs worked on work orders
Employee Information	
Default Job Report	Report of default job coverage
Employee Report Card	Employee Report Card / Review Tracking
Management Hierarchy	Shows a hierarchical view of employees by manager.
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Absentee Report	Summarizes attendance of your employees during a calendar week. Shows either "Absent" or total hours worked on the calendar day. Absent status is not based on the employee's schedule
Attendance Hours	Shows employee attendance of hours compared to scheduled time.
Attendance Percentage	Shows employee attendance as a percentage of scheduled time.
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Schedules Per-Hour	Shows employee schedules, per hour, on a weekly basis.
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Sign-off Report	Printable timecard report showing payable hours by employee for each work day, regardless of payroll period boundaries. Includes lines for employee and manager approval signatures.
Worked Months	Shows the hours that each employee has worked during each month of the year.

Special Reports provide information and data from the system beyond the standard Time Edit/Report. Select a report by clicking on the report name

Under Schedules, click on: Worked Months

- **Select date containing the year to view** using the pull-downs.

  NOTE: The report will always begin with January and end with December.

- **Select employee group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.
  - The Manage link opens up the Selection Groups page where you can customize which employees to include in a preset group.
- Click the **Run Report** button.

Worked Months Report

Prev Year	Hours Worked Between Jan, 1 2013 and Dec, 31 2013 CST	Next Year

Name	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Backup, Joey	Abs	Abs	Abs	Abs	Abs	Abs	Abs	Abs	Abs	85	---	---	85
Boresow, Patty	Abs	Abs	Abs	Abs	Abs	Abs	161	374	4	58	4	---	601
Keeler, Larry	Abs	Abs	Abs	Abs	Abs	Abs	Abs	32	668	406	6	---	1112
Keeler, Matthew M.	Abs	Abs	Abs	Abs	Abs	Abs	Abs	173	668	435	---	---	1276
Lierz, Ken	Abs	Abs	Abs	Abs	Abs	Abs	Abs	Abs	660	412	7	---	1079
Lierz, Whitney	Abs	Abs	Abs	Abs	Abs	Abs	Abs	Abs	660	407	---	---	1067
Tatro, Betty	Abs	Abs	Abs	Abs	Abs	Abs	Abs	198	660	436	---	---	1294
Wolf, Hannah	Abs	Abs	Abs	Abs	Abs	Abs	Abs	Abs	660	405	---	---	1065
Wolf, Jad	Abs	Abs	Abs	Abs	Abs	Abs	Abs	Abs	660	389	---	---	1049

- Scroll through different weeks by using the **Prev Year** and **Next Year** links at the left and right of the date range.
- You can also arrange alphabetically or in progressive order (highest to lowest / lowest to highest) by clicking on the header of selected category.
- To run the Worked Months Report again, click on the blue **Back** arrow at the top left corner.

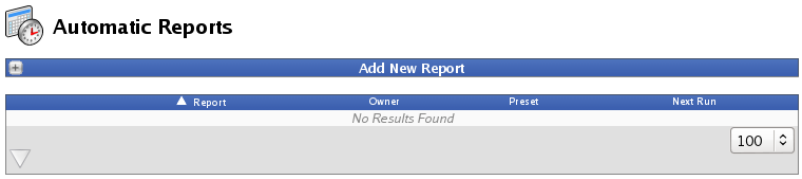
NOTE: Time Worked is rounded to the nearest hour.

Automatic Reports

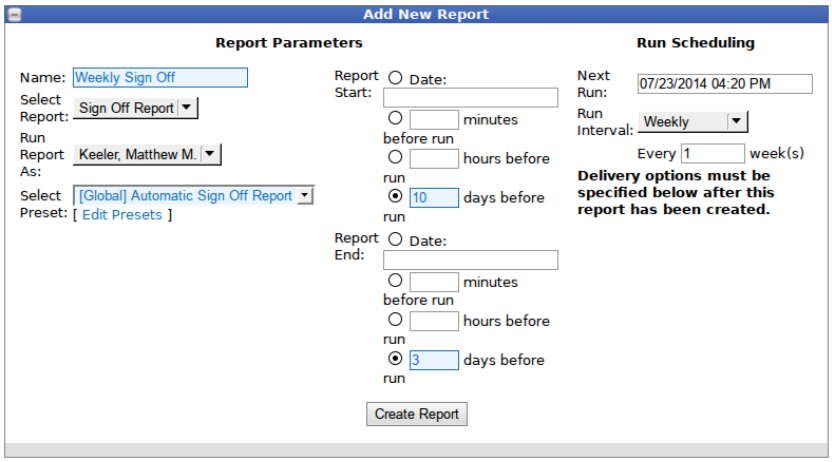
Automatic reports provide a way to run Custom Reports and Sign Off Reports on an automated basis. Reports can run for custom time frames from hours to years and can send the report by email or upload to an FTP server.

Automatic Reports require the IPSEML email automation module.

Using the left pane Main Menu » Administration, click on: Reports » Automatic Reports



Add a New Report



1. Click the **+** (plus) sign to the left of the **Add New Report** bar.

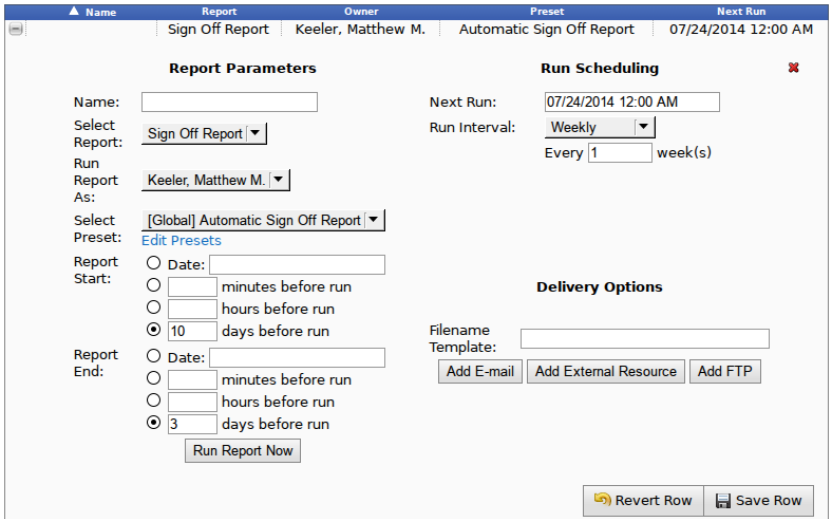
2. Assign a descriptive **Name** to this report.
3. **Select** either a **Sign-off Report** or a **Custom Report.**
4. From the drop down menu, choose an employee to **Run the Report As**. This allows reports to be configured for managers or employees so the reports will run with visibility and permissions granted to that employee.
5. **Select a Preset** from the drop down list.

   NOTE: If a preset has already been created for either a Custom Report or Sign-off Report, you will find it in the Select Preset drop down list.

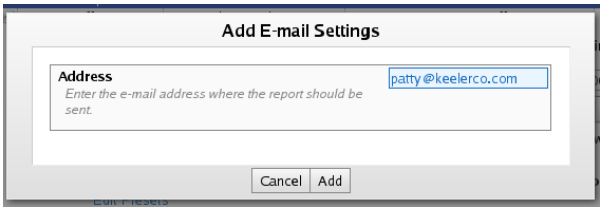
   - To edit an existing preset or to create a new one, click the **Edit Presets** link.
6. Choose a **Report Start**
   - by Date:
     - Click in the circle (aka radial button) to select **Date**.
     - Click on the field below to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
   - by a specified amount of time before the report is scheduled to run. Choose from Minutes, Hours, or Days before.
     - Click in the circle (aka radial button) to select either **Minutes before run**, **Hours before run**, or **Days before run.**
     - Then type the value of time in the corresponding field.
7. Choose a **Report End**
   - by Date:
     - Click in the circle (aka radial button) to select **Date**.
     - Click on the field below to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
   - by a specified amount of time before the report is scheduled to run. Choose from Minutes, Hours, or Days before.
     - Click in the circle (aka radial button) to select either **Minutes before run**, **Hours before run**, or **Days before run.**
     - Then type the value of time in the corresponding field.
8. Select when to do the **Next Run**. Either click in the field to display a calendar and then select the date, or just type over the displayed date and time.
9. Select the frequency of this report from the **Run Interval** drop down list. Each selection will have additional options (displayed directly below) that will allow further time configuration.
10. Click the **Create Report** button to save.

NOTE: Delivery options must be specified below after this report has been created.

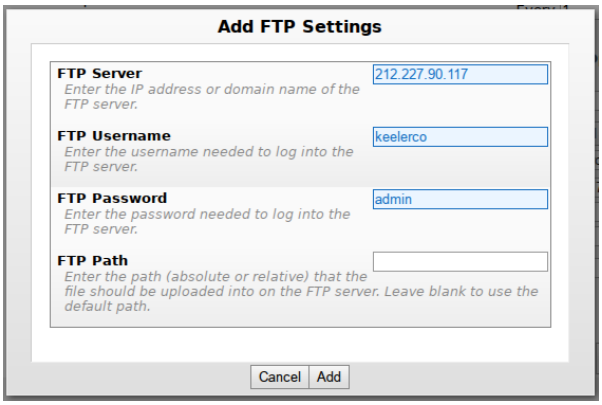
Edit an Autmatic Report

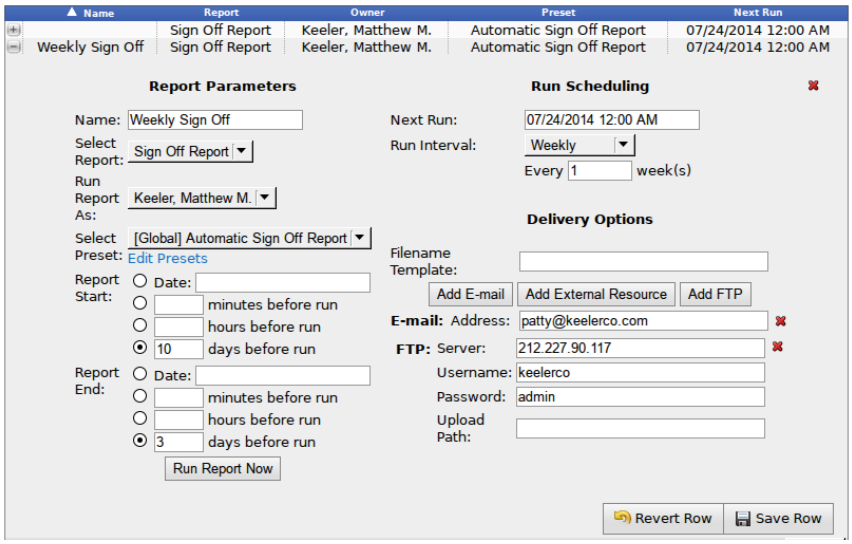


- All of the **Report Parameters** and the **Run Scheduling** are editable.
- The **Delivery Options** must be specifed here.
  - **Filename Template**: Enter a template for the filename to be generated.
    - %Yfor the year
    - %m for the month
    - %d for the day
    - %H for the hour
    - %M for the minute
    - %S for the second
    - %P for the AM/PM
    - %s for the unix timestamp (seconds since 12am, Jan 1, 1970 in GMT)
    - Additional options can be used, per PHP strftime function.
  - Click the **Add E-mail** button.
    - Enter the e-mail address where the report should be sent, then click the **Add** button to save.



- Click the **Add FTP** button.
  - Add the IP address or domain name of the FTP server.
  - Enter the Username needed to log into the FTP server.
  - Enter the Password needed to log into the FTP server.
  - Enter the Path (absolute or relative) that the file should be uploaded into on the FTP server. Leave blank to use the default path.
  - Click the **Add** button to save.





These settings continue to be editable and even deleted.

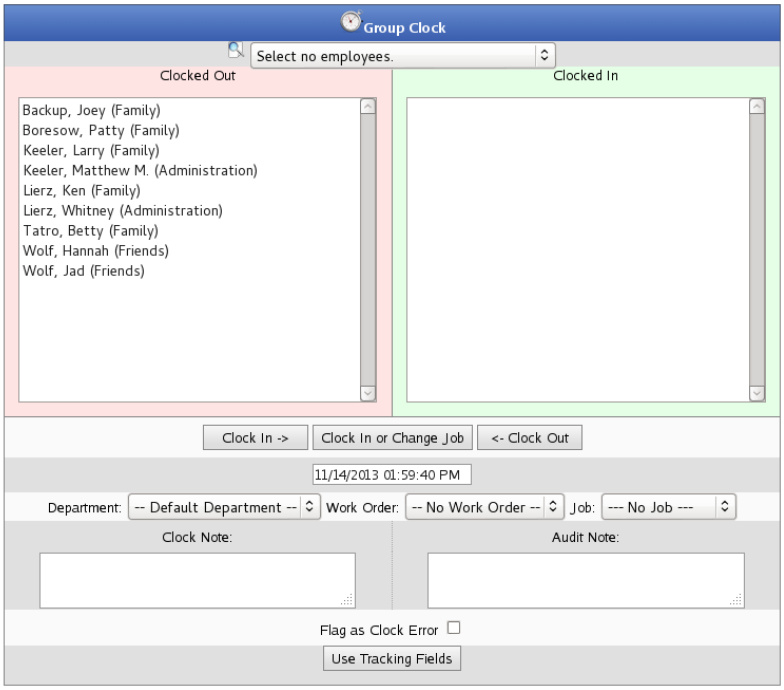
- Click on the **Save Row** button to save the changes.

Group Clock

The Group Clock feature allows clocking groups of employees in, out, and in to another job. This feature can be helpful to track time during off-site training and allows managers to clock out employees they know are no longer working. The Schedules optional module is required.

Using the left pane Main Menu » Administration, click on: Clocking » Group Clock

Group Clock



To Group Clock employees IN or OUT

1. Select a specific group of employees you want to clock in from the drop down menu or individual employees from the **Clocked Out** window.

   NOTE: Select multiple employees by clicking on their names while holding down the CTRL key.

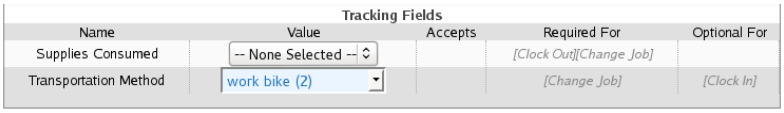
2. If clocking an employee or employees into a specific **Department**, **Job**, and/or **Work Order**, select the appropriate options from the drop-down boxes.
3. If necessary, select the Clock In/Out **date and time**. Click in the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.

   NOTE: The clock in and out time defaults to the current time.

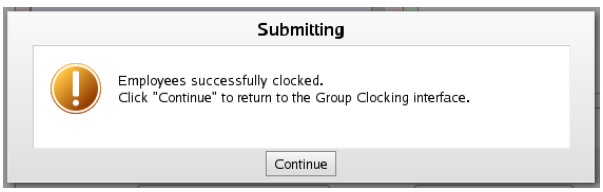
4. Enter any **Clock** or **Audit notes** as needed.
5. If necessary, check the **Flag as Clock Error** checkbox.

   TIP: Flagging the event as a clock error can be especially useful when the actual clock in/out time is unknown. Therefore, the time event can be recognized as a clock error and adjusted as necessary.

6. If using tracking fields, click the **Tracking Fields** button to show the tracking field area. Make your selections.



7. Click on the **Clock In ->** button to clock your selected employees in. -OR- Click on the **<- Clock Out** button to clock your selected employees out.



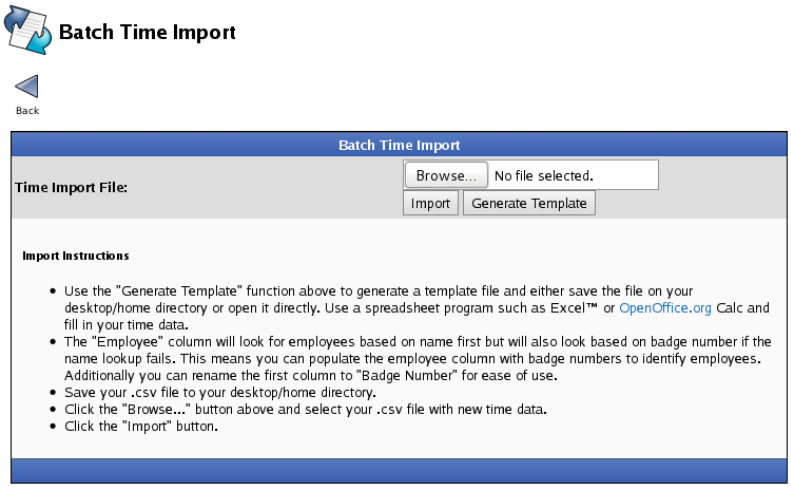
Batch Time Import

Batch Time Import allows importing a spreadsheet of hours worked on shifts by one or more employees.

Using the left pane Main Menu » Administration, click on: Clocking » Batch Time Entry

and then click on the Import Time icon

at the top of the page.



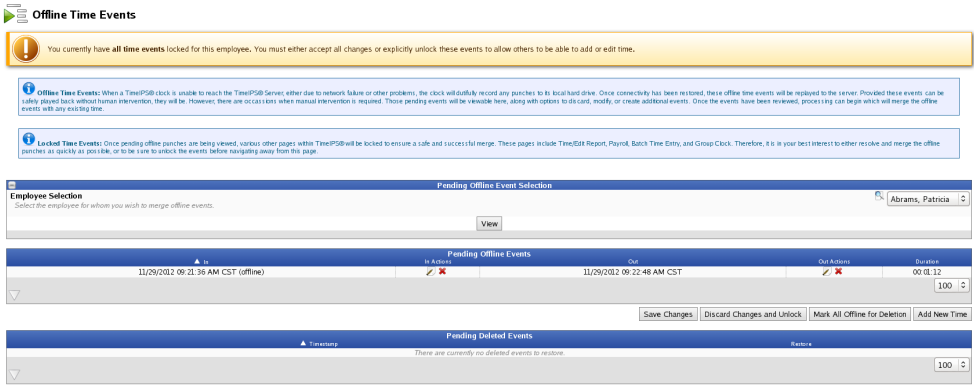
- Use the **Generate Template** function above to generate a template file and either save the file on your desktop/home directory or open it directly. Use a spreadsheet program such as Excel™ or OpenOffice.org Calc and fill in your time data.
- The **"Employee" column** will look for employees based on name first but will also look based on badge number if the name lookup fails. This means you can populate the employee column with badge numbers to identify employees. Additionally you can rename the first column to "Badge Number" for ease of use.
- **Save** your .csv file to your desktop/home directory.
- Click the **Browse...** button and select your .csv file with new time data.
- Click the **Import** button.

Offline Events

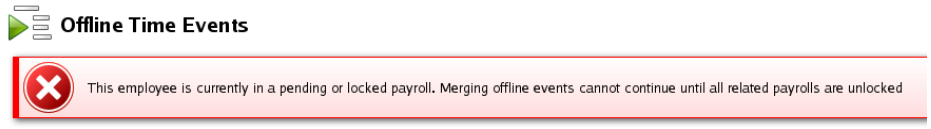
When a TimeIPS® clock is unable to reach the TimeIPS® Server, either due to network failure or other problems, the clock will dutifully record any punches to its local hard drive. Once connectivity has been restored, these offline time events will be replayed to the server. Provided these events can be safely played back without human intervention, they will be. However, there are occasions when manual intervention is required.

Warning! There are employees with pending offline events which **will not be included in any payroll export** until they have been reviewed and merged successfully through the *Offline Events page*.

Those pending events will be viewable here, along with options to discard, modify, or create additional events. Once the events have been reviewed, processing can begin which will merge the offline events with any existing time. Locked Time Events: Once pending offline punches are being viewed, various other pages within TimeIPS® will be locked to ensure a safe and successful merge. These pages include Time/Edit Report, Payroll, Batch Time Entry, and Group Clock. Therefore, it is in your best interest to either resolve and merge the offline punches as quickly as possible, or to be sure to unlock the events before navigating away from this page.

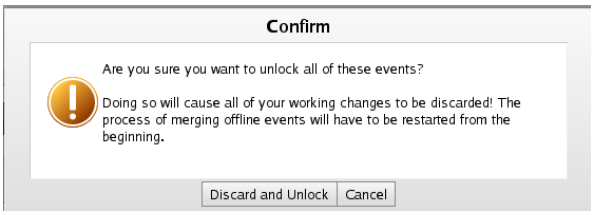


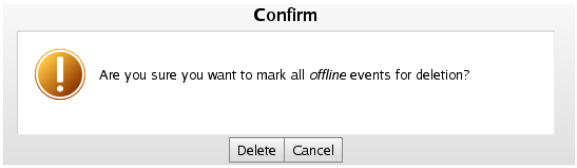
If the events are not resolved, it can cause issues for employees by not reporting additional offline punches for current pay periods. If that occurs, the previous payroll must be unlocked and the events must be resolved. Once completed, that payroll can be locked again.

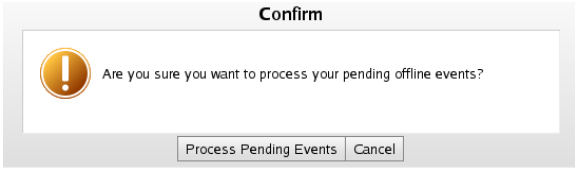


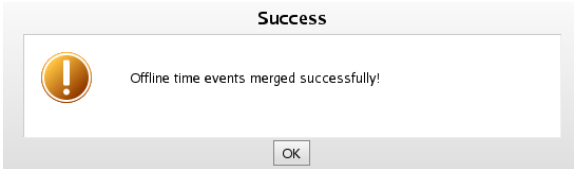
Once the payroll has been unlocked, navigate back to the Offline Events Page.

please note: (If the time has already been manually entered for the events, they should be unlocked and disgarded.)





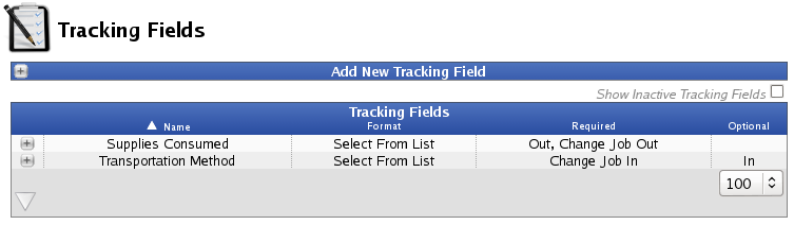




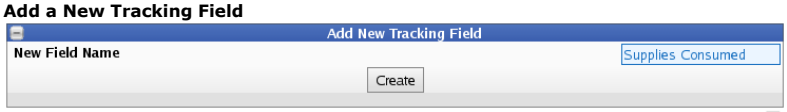
Tracking Fields

Tracking fields allow employees to provide additional information when they clock in, clock out, or change jobs. You can specify when each field is presented to the employee by changing the values for "Required on In", "Required on Out", and "Required on Job Change."

Using the left pane Main Menu » Administration, click on: Clocking » Tracking Fields



Add a New Tracking Field



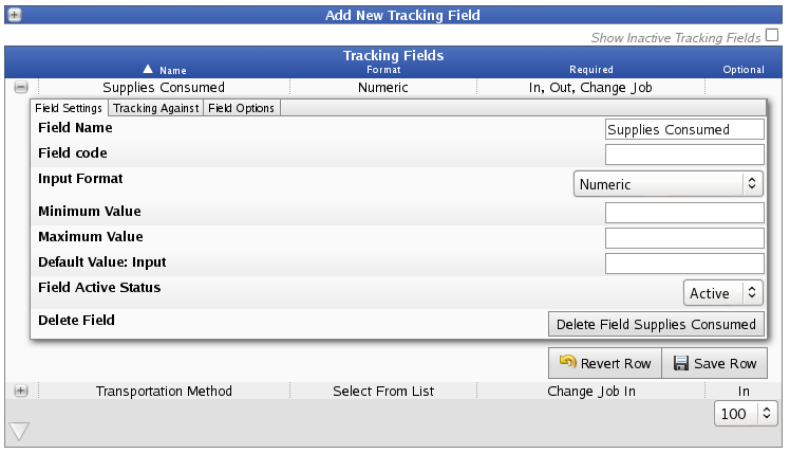
1. Click the **+** (plus) sign to the left of the **Add New Tracking Field** bar.
2. **New Field Name:** provide the name for a new tracking field.
3. Click the **Create** button to save.

NOTE: The Tracking Field settings are set up in the Tracking Fields table below.

Setup and Edit

- Click the **+** (plus) sign to the left of the **Tracking Field Name**.

Field Settings tab

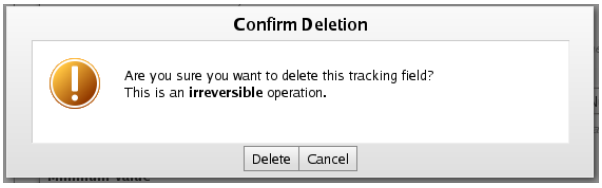


- The **Field Name** of the item that you wish to track can be edited here.
- (Optional) Add a tracking **Field Code** to differentiate between multiple fields with the same name.
- The **Input Format** defines the acceptable input values that employees can provide for this field.
  - Choosing **Numeric** allows you to define a **Minimum**, **Maximum**, and **Default Value**.
  - Choosing **Alphabetic**, **Alphanumeric**, or **Alphanumeric + Symbols** allows you to define a **Minimum** and **Maximum Length** as well as a **Default Value**.
  - Choosing **Select From List** allows you to define a list of valid field options on the **Field Options** tab. Once there are field options added, a **Default Option** can be choosen from the Field Settings tab.

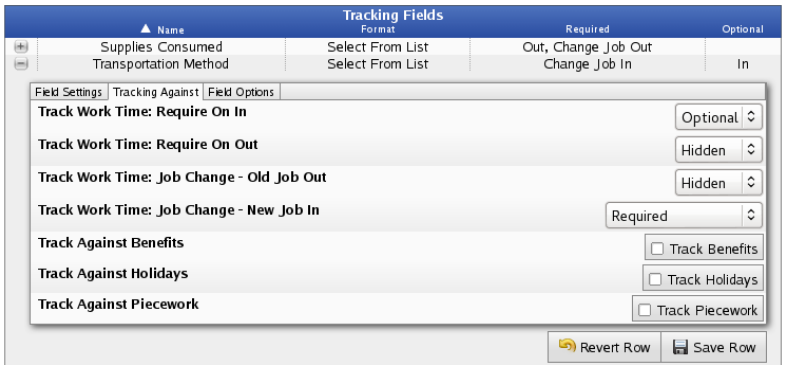
NOTE: If the "Input Format" is changed, click the "Save Row" button to update the other setting options before continuing.

- **Field Active Status**: Making this field inactive hides it from many parts of the employee interface while maintaining historical data.
- Clicking the **Delete Field** button removes this tracking field from the entire system.

NOTE: A Tracking Field is only able to be deleted if it has not yet been used. Once the tracking field has been used, the Delete option is no longer displayed. Alternatively, the field can be made inactive.



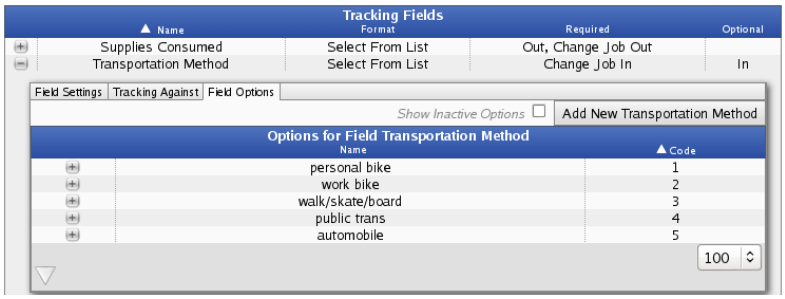
Tracking Against tab



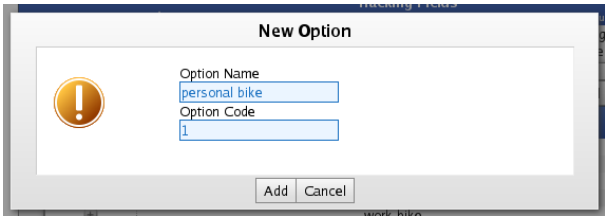
- Decide when this tracking field should be **Required** vs **Optional** or **Hidden** all together.
  - When Clocking In.
  - When Clocking Out
  - When Leaving a Job during a job change.
  - When Starting a New Job during a job change.
    - If the same value should be applied to both the Clock Out of the Old Job and the Clock In to the New Job during a job change, then set "New Job In" to **Shared/Single Input** and set Old Job Out to either required or optional.
- If this tracking field should be associated with **Benefit** usages, **Holiday** events, or **Piecework** events, then check the correlating box.

Field Options tab

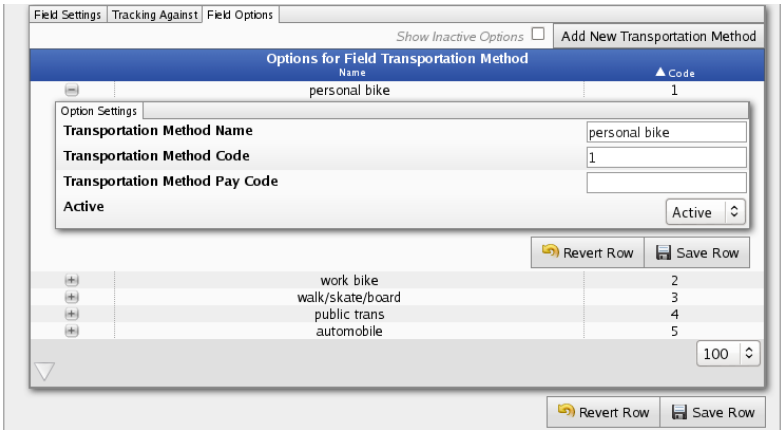
If "**Select From List**" was choosen on the Field Settings tab, the **Field Options** tab will be available to define a list of valid field options. Field Options can have additional associated information such as codes for payroll.



- Click the **Add New** (Your Tracking Field Name) button. In the example above, we click the **Add New Transportaion Method** button.



- Type a descriptive **Name** to identify this option within the tracking field.
- Type a **Code** to be associated with this option. This code can be used for payroll and/or to choose the field option at a clock.
- Click the **Add** button.



The New Option will now appear in the Options list.

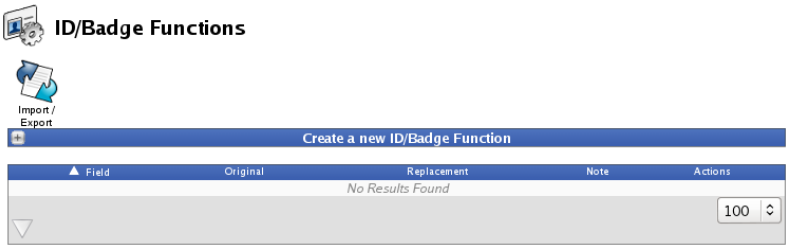
- Click the **+** (plus) sign to the left of the **Option Name** to display the Options Settings tab.
- If neccessary, edit the **Name** used to identify this option.
- If neccessary, edit the **Code** to be associated with this option. This code can be used for payroll and/or to choose the field option at a clock.
- Optionally, a **Pay Code** can be added. The Pay Code is used for custom reporting and payroll.
- By default, the Option is **Active**. To make this Option unavailable to employees, change this to **Inactive**.
- Click the **Save Row** button to save your changes.

ID/Badge Functions

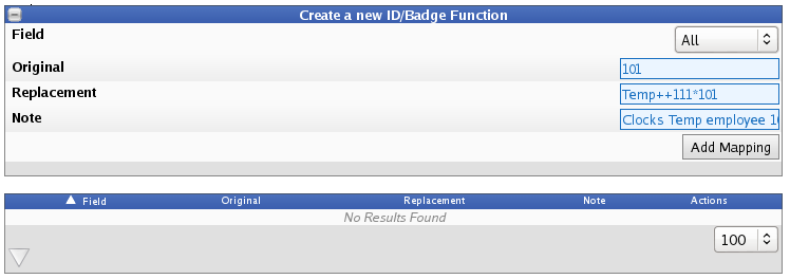
The ID/Badge Functions allow TimeIPS to convert entered numbers into any other number or text. This can be helpful in a number of instances such as:

- *You are adding swipe badges to your existing keypad system. If employees forget their badge, you want them to still be able to type their original Employee ID into the keypad*
- *An employee has been assigned several badges for each of the jobs he/she performs.*

Using the left pane Main Menu » Administration, click on: Clocking » ID/Badge Functions



Add a New ID/Badge Function

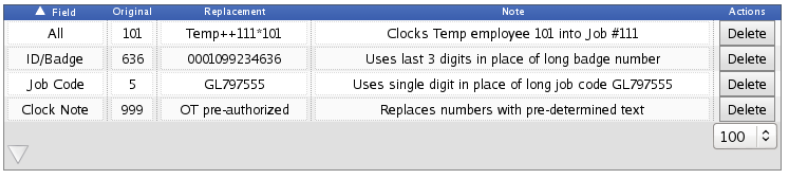


1. Click the **+** (plus) sign to the left of the **Create a new ID/Badge Function** bar.
2. From the drop down menu, choose which **FIeld** this mapping will apply to.
   - **All** - Data entered in the Replacement field will replace ALL of the data entered in the Original field.

     NOTE: If choosing "All", your *replacement* needs to be a command that evaluates to an explicit clock, such as "1234++10*100", for "(Clock Note)++(Job Code)*(Badge Number)"
   - **ID/Badge** - Data entered in the Replacement field will replace the ID/Badge data entered in the Original field.
   - **Job Code** - Data entered in the Replacement field will replace the Job Code data entered in the Original field.
   - **Clock Note** - Data entered in the Replacement field will replace the Clock Note data entered in the Original field.
3. In the **Original** field, enter the value the employee will present at the clock station.
4. In the **Replacement** field, enter the value that will replace the Original field's value.
5. Select the portion of the badge that you want to replace by clicking on the drop-down in the **Field** column.
6. Enter a **Note** to explain what the ID/Badge function does.
7. Click on the **Add New Function** button.

NOTE: The Original, Replacement and Note fields are "edit-in-place" fields. To change data in these fields, simply click on the data, make your change, then click anywhere outside the field to save your change.

Examples of ID/Badge Functions



Field	Original	Replacement	Note	Actions
All	101	Temp++111*101	Clocks Temp employee 101 into Job #111	Delete
ID/Badge	636	0001099234636	Uses last 3 digits in place of long badge number	Delete
Job Code	5	GL797555	Uses single digit in place of long job code GL797555	Delete
Clock Note	999	OT pre-authorized	Replaces numbers with pre-determined text	Delete

100

Example "All"

Company A has a temporary employee with badge #101 who always works Job #111. To help keep track of his time, Company A adds a clock note that identifies the employee as a "Temp" every time he clocks in or out. Since the temporary employee always clock into Job #111, the Employee or Payroll Administrator adds this function to the ID/Badge function as well by selecting "All" in the Field drop-down and entering the following ID/Badge Function:

Original: 101 Replacement: Temp++111*101

When the employee enters "101" at the keypad, it automatically clocks him into Job #111 and adds the clock note "Temp" to the clock record.

Example "ID/Badge"

Company B uses swipe badges for employee clocking, but wants employees to still be able to clock in using the keypad when needed. Rather than having employees memorize the long swipe badge number, employees can use the last 3 digits of their badge number to clock in/out. The Employee/Payroll Administrator selects "ID/Badge" in the Field drop-down and enters the following ID/Badge Function:

Original: 636 Replacement: 0001099234636

When the employee enters "636" at the keypad, their long swipe badge number is entered in its place and the employee is clocked in or out.

Example "Job Code"

Company C associates their general ledger numbers with specific jobs. Because of this, their job codes contain letters. Since letters can not be entered on the TimeIPS numeric keypad, the Employee or Payroll Administrator selects "Job Code" in the Field drop-down and enters the following ID/Badge Function:

Original: 5 Replacement: GL797555

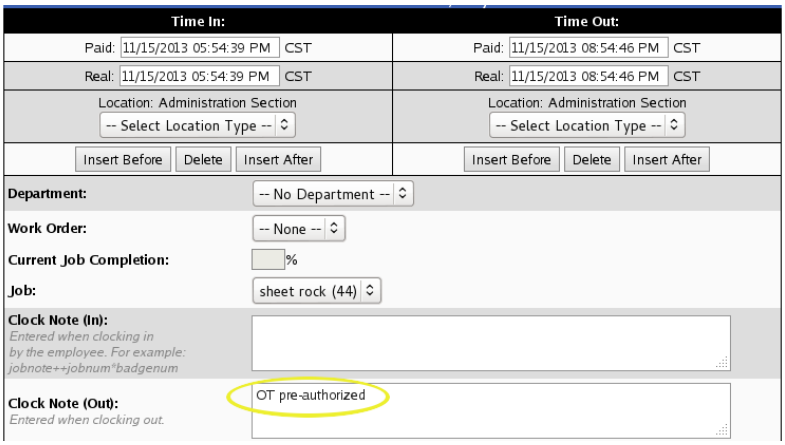
The employee enters the number "5" followed by an asterisk and their badge number and is clocked into Job number "GL797555".

Example "Clock Note"

Company D closely monitors overtime. When an employee has received pre-authorization to go into overtime, they can enter 999 followed by an asterisk and their badge number and a clock note that says "OT pre-authorized" will be added to their clock event. The Employee or Payroll Administrator selects "Clock Note" in the Field drop-down and enters the following ID/Badge Function:

Original: 999 Replacement: OT pre-authorized.

The employee enters "999" followed by ++ and their badge number. A clock note is added to their time event that states "OT pre-authorized".

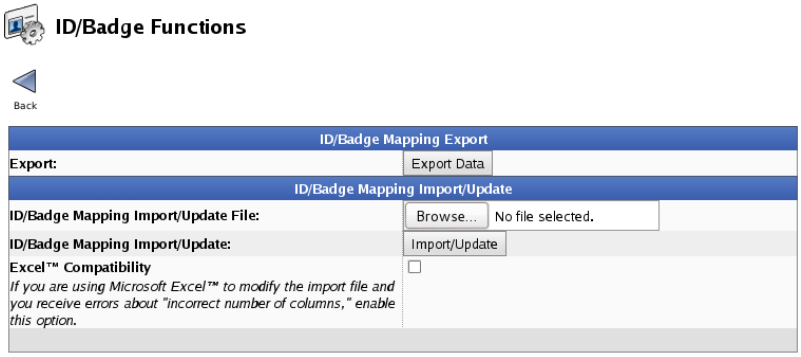


ID Badge Functions Import

ID Badge Functions Import allows importing a spreadsheet of badge functions.

Using the left pane Main Menu » Administration, click on: Clocking » ID/Badge Functions

Then click on the Import/Export icon.



Export Instructions

- Click the **Export Data** button to generate a .csv file containing the selected information.
- To edit the resulting .csv file, we recommend a spreadsheet application such as Excel™ or OpenOffice.org Calc.
- If you make changes to the .csv file and would like those changes to take effect in TimeIPS®, use the "ID/Badge Mapping Import/Update" function below.

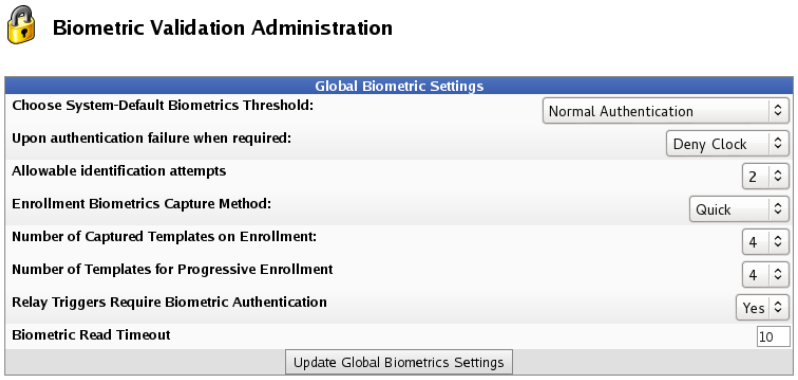
Import Instructions

- Use the "Export Data" function above to generate a template file and either save the file on your desktop/home directory or open it directly. Use a spreadsheet program such as Excel™ or OpenOffice.org Calc and fill in your ID/Badge Mapping data.
- Save your .csv file to your desktop/home directory.
- Click the **Browse...** button above and select your .csv file with new or updated ID/Badge Mappings data.
- Click the **Import/Update** button.

Biometric Validation

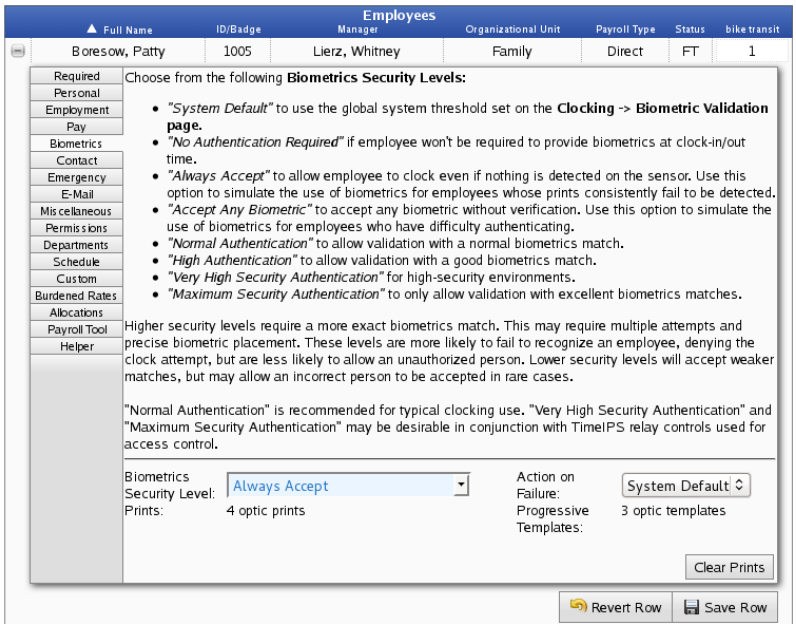
TimeIPS can validate employee identification using biometric fingerprint authentication. Employees clock in and out of TimeIPS and are asked to present their finger or thumb for validation. You can deny the clock event or send an email warning if the validation fails.

Using the left pane Main Menu » Administration, click on: Clocking » Biometric Validation



1. Set the Global Fingerprint Settings: *These settings allow you to set up Biometric Validation for all employees. (If necessary, you can adjust settings for individual employees in step 2.)*
   a. **Choose a System Default Threshold:** Select the level of authentication security appropriate for your work environment. The higher security levels make it nearly impossible to clock as another individual, but may cause occasional false negative readings, requiring the employee to re-authenticate.
   b. **Upon authentication failure when required:** If an employee fails to authenticate within the allowable number of attempts, the specified action will be taken.
   c. **Allowable Identification Attempts:** The number of times an employee can attempt biometric validation per clock.
   d. **Enrollment Biometrics Capture Method:** Multi-read enrollment uses the best of three reads. Quick enrollment uses a single read and can be used with multiple templates per enrollment.
   e. **Number of Captured Templates on Enrollment:** Number of separate templates that are stored per employee at the time of enrollment. Additional templates can reduce authentication failures, but may slightly increase the chance of false positives. **Warning:** Allowing multiple templates could allow more than one individual to enroll, thereby allowing multiple individuals to authenticate. When using multiple templates, supervised enrollment is advised.
   f. **Number of Templates for Progressive Enrollment:** Number of additional templates that are stored per employee automatically after a successful validation. These additional templates are used to supplement the initial enrollments to accommodate weaker templates. Poor progressive enrollments will be automatically deleted as new, better ones are automatically enrolled.
   g. **Relay Triggers Require Biometric Authentication:** By default, employees must pass biometric authentication to trigger relay functions. Disable this option if relay triggers must occur as soon as a valid employee id/badge is read. This is useful in some access control systems. To Disable, choose **No** from the drop down.
   h. Enter the number of seconds the system will wait to receive a valid read for the **Biometric Read Timeout**
   i. Click on the **Update Global Fingerprint Settings** button to apply the settings.

2. (Optional) If you have individual employees that should have different security levels or failure actions:
   a. Open Employees -> Employees and click the **+** (plus) sign in front of the employee's name.
   b. Click on the **Biometrics** tab.
   c. Select the employee's **BIometrics Security Level** and the **Action on Failure** options from the pull-downs.
   d. The Number of Optic Prints as well as the Number of Optic Templates will be shown. Pressing the **Clear Prints** button will remove all optic prints and templates, and will therefore require the empolyee to enroll again.
   e. Click on the **Save Row** button to apply the settings.



3. Have employees Enroll their Fingerprints.

NOTE: Employees will be prompted to enroll their fingerprints the next time they attempt to clock in or out once the Biometric device has been installed and the global and individual Fingerprint Settings have been applied.

   a. Clock in or out as usual (swipe badge or enter ID on keypad and press ENTER).

b. Follow the visual and audio directions to enroll then authenticate.

NOTE: Use the ball of the finger (not the tip) and press firmly enough that the finger makes good contact with the read area.

NOTE: Once the enrollment is complete, TimeIPS will load the enrolled fingerprint(s) so your clock in or out from step 3a can be authenticated.

Enrollment

Recommended Enrollment Method

1. Set "Enrollment Fingerprint Capture Method" to Multi-read.
2. Set "Number of Captured Fingerprint on Enrollment" to 2.
3. Set "Number of Fingerprints for Progressive Enrollment" to 10.
4. When employees enroll, have them:
    - present their right index finger straight on for the first capture,
    - present their left index finger straight on for the second capture

Alternative Enrollment Method

This procedure captures a large surface area for one finger and the main surface for another digit (in case of injury to the first finger).

1. Set "Enrollment Fingerprint Capture Method" to Quick.
2. Set "Number of Captured Fingerprint on Enrollment" to 5.
3. When employees enroll, have them:
    - present their thumb/finger straight on for the first capture,
    - roll the thumb/finger to the left for the second capture,
    - to the right for the third capture,
    - the top of the thumb/finger for the fourth capture,
    - and a different finger straight on for the fifth capture.

Progressive Enrollment

The TimeIPS system has the ability to "learn" each time a user provides a fingerprint. If the fingerprint is a match to a stored fingerprint, the TimeIPS system generates and stores a new template based on the current template for future matching. For each new template that is stored, an old template that has not been used for matching is discarded.

This method allows users to provide fewer enrollment prints (saving time), reduces false-negatives over time as the system can more easily recognize the employee, and accommodates fingers or swipe methods that change over time.

- Set the Number of Captured Fingerprints on Enrollment to desired number. (Remembering that if it is multiple a supervisor should be present during enrollment)
- Set the Number of Fingerprints for Progressive Enrollment to 10.

This will allow the maximum amount of stored fingerprints and when 10 has been reached the 11th good match will be stored and will automatically remove the least used fingerprint in the system thereby always maintaining the best 10 matches for that employee.

Note: Employees using Biometric Validation automatically enroll by using the biometric sensor one or more times on their first clock attempt. Re-enroll employees who have trouble validating by selecting "Clear."

If an employee has consistent authentication failures:

There are two types of errors you may see when an employee attempts to authenticate using biometrics: "Could not read finger print" indicates that the reader is unable to take a good scan of the print. If you received this message:

- When employees touch the sensor, they must use the "ball" of their fingers (not the tip). If they're doing it correctly, the finger will be straight, not curled.
- Make sure the employees press reasonably firmly on the sensor. The finger must spread out over the surface of the sensor so the senor can read it.
- Employees should press on the sensor fairly quickly. They should not hesitate. A slow touch or touch-release-touch can confuse the reader.
- Press the finger on the sensor and hold it still for a couple of seconds. If the clock doesn't seem to read the finger, twist your finger slightly, or slide it just a bit, and hold it again for a couple of seconds.
- Fingers read much better if they have a slight bit of moisture. If hands are very dry, try using a bit of hand lotion. If lotion is not available, just take a deep breath and slowly exhale onto the finger for a few seconds. Then, immediately press the finger to the sensor.
- Ensure that employee hands are clean. Employees should wash their hands if needed. It is advisable to provide towels for employees to properly dry their hands after washing as excessively wet fingerprints will also fail to read.
- Try different fingers. Some fingers may not have sufficient fingerprint detail to be used. Try the thumb or other fingers. Try both hands.

The second message of "No match found" would indicate that a read was taken but the read wasn't a clear match to the data on file. This is not unusual especially for employees new to the biometric reader. In a situation like this, please try the following steps:

- Raise the number of attempts to five thus giving the employee at least five tries to obtain a match
- Delete the employee's Fingerprint data using the **Clear Prints** button on the Employee's Biometric page. The employee will be prompted to enroll on their next clock in/out.
- Lower the employee's fingerprint threshold.

If an employee injures the finger they use for clock in/out:

- Delete the employee's Fingerprint data using the **Clear Prints** button on the Employee's Biometric page. The employee will be prompted to enroll on their next clock in/out.

Fingerprint Storage

TimeIPS captures fingerprint data for each employee. Unless specifically requested, TimeIPS does not store an image of the employee's fingerprint. The TimeIPS reader looks for and "maps" the pattern on the finger or thumb, and then creates a mathematical profile of the print using an algorithm.

The profile data is stored as binary data to be used for later comparisons. It allows future prints to be analyzed and rated as to the degree of similarity to the original print(s). For convenience, the system is capable of storing up to ten print profiles per employee.

When an employee enters a PIN code or presents a badge, TimeIPS will prompt for a finger or thumb to be presented to the reader for validation. TimeIPS will, at that time, compare the data it is reading currently against the profile(s) it has stored on file for that specific employee number.

The data stored within the system uses formatting and encoding that is proprietary to the TimeIPS system, and can not be used to re-create a fingerprint or for any purpose outside of TimeIPS.

Examples

Company 1 is set to Quick enrollment with 3 captures. The enrollment process beings when the employee clocks in for the first time. For the first capture, the employee places his thumb centered on the biometric reader for the single read. For the second capture, the employee tilts his thumb slightly to the left for the single read. For the final capture, the employee tilts his thumb slightly to the right for the single read.

Company 2 is set to Multi-Read enrollment with 2 captured fingerprint. The enrollment process beings when the employee clocks in for the first time. For the first capture, the employee places his right thumb centered on the biometric reader for all three reads. For the second capture, the employee places his left thumb centered on the biometric reader for all three reads. The employee can clock in and out with either thumb. Again note that supervised enrollment is HIGHLY recommended for multiple captures to ensure that each employee enrolls with only his own thumbs.

WARNING: Allowing multiple fingerprint captures could allow more than one individual to provide a thumb at enrollment, thereby allowing multiple individuals to authenticate for one employee. When using multiple captures, supervised enrollment is advised.

See Also:
Hand Punch Biometric Validation
Biometric Validation
Biometric Validation Troubleshooting

Fingerprint Biometric Troubleshooting

TimeIPS can validate employee identification using fingerprint biometrics. If employees have trouble using fingerprint biometrics, please follow these troubleshooting steps:

1. Make sure the employee is using the sensor correctly. This includes:
    1. Placing the finger flat against the sensor.
    2. Pressing the finger firmly on the sensor.
    3. In cases where the hands are very dry, it may be necessary to press extra firmly.
    4. Use a small amount of skin moisturizer on dry skin.
    5. Press the finger on the sensor and hold it still for a couple of seconds. If the clock doesn't seem to read the finger, twist the finger slightly, or slide it just a bit, and hold it again for a couple of seconds.
    6. For optical biometric readers, review placement diagrams and instructions on our biometric poster: BiometricsEnrollmentGuide

2. Make sure fingerprint settings are optimal.
    1. Set fingerprint matching attempts to at least 5
    2. Set match quality to normal

3. Make sure enrollments are good.
    1. Clear the employee's prints and allow them to re-enroll.
    2. Use the multi-read enrollment option.
    3. Capture at least 3 prints.
    4. Capture prints for at least two fingers (the same finger on each hand).

4. Use progerssive enrollment.
    1. The progressive enrollment setting allows the sensor to learn and improve matching ability each time the employee successfully clocks.
    2. Allow the system to track at least 4 progressive prints per employee.
    3. After enrollment, have the employee clock in/out at least 5 times to get the progressive enrollment started.

5. Try different fingers
    1. Some employees have one or more fingers that are harder to read than others.
    2. Keep trying different fingers until one with a good fingerprint is found.

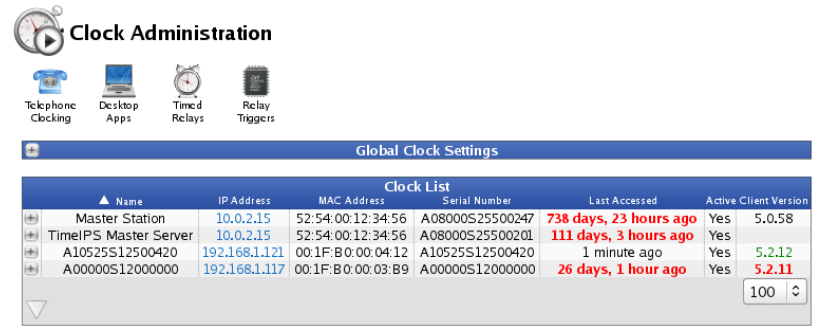
6. Supervise employees who report problems.
    1. In some cases employees who resent biometrics report problems that can't be reproduced when a manager is present to watch the enrollment and clocking.

See Also:
Biometric Validation

Clock Configuration

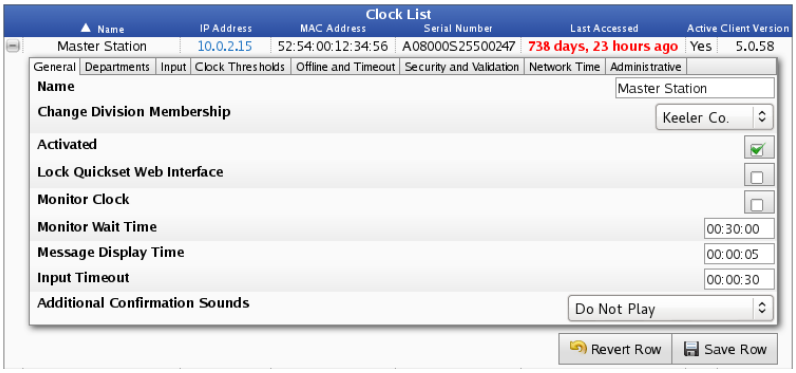
Clock Configuration allows viewing and managing of the clocks associated with your system. These are the clocks that are used to clock in or out.

Using the left pane Main Menu » Administration, click on: Clocking » Clock Configuration



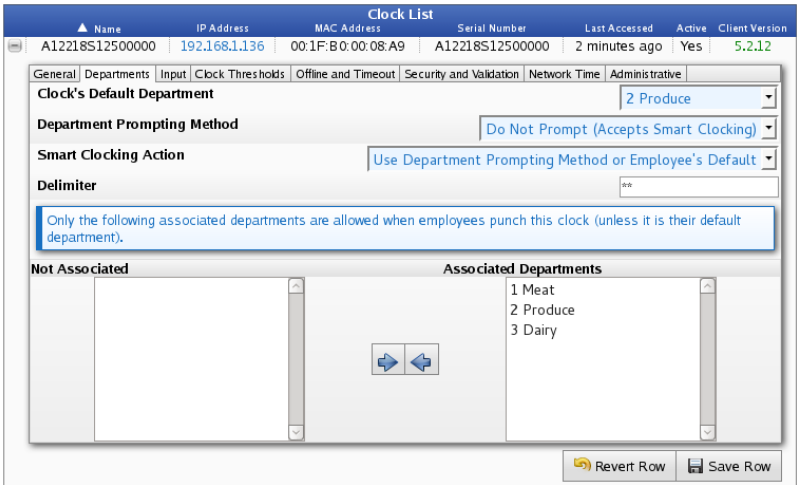
Click on the **+** (plus) sign to the left of the Clock Name to view its settings.

General Tab



- Enter a **Name** for this clock that is descriptive of its purpose or location.
- **Change Division Membership**: Move this clock into a different division using the drop down box.
- Check the **Activated** box to allow employees to clock in and out from this clock.
- Check the **Lock Quickset Web Interface** box to lock out the Web Management interface to this clock. Making changes will require a valid administrator's badge and PIN number.
- When the **Monitor Clock** box is checked, TimeIPS will send up to three email alerts to the administrator if this clock has stopped communicating with its server.
- **Monitor Wait Time**: If this clock will be monitored, specify a time since the last successful connection to wait before sending an e-mail alert. The TimeIPS Server checks 10 times per hour for clocks that have not connected.
- **Message Display Time**: Specify the number of seconds that a pop-up display on this clock should last.
- **Input Timeout**: Specify the number of seconds that a clock will wait for input before returning to the main screen.
- Choose whether to play **Additional Confirmation Sounds** when keys are pressed and tell the time when clocking in or out.
- Click on the **Save Row** button to apply the settings.

Departments Tab



- Choose the **Clock's Default Department**. This is the default Department that will be used when employees clock in from this device if you have Smart Clocking Action set to "Use Clock's Department."
- Changing the **Department Prompting Method** will enable/require the selection of a Department at this clock.
  - **Text Input**: After an employee clocks, the employee will be prompted to enter the department code.
  - **Select from List**: After an employee clocks, the employee will be prompted to pick a department from the list provided.
  - **Do Not Prompt (Accepts Smart Clocking)**: An employee can clock in using their Department Code, the Delimiter, and then the Badge Number. This will clock them into that department. If a department code is not entered, the employee is not prompted and is either clocked into an assigned default department or no department at all (depending on the Smart Clocking Action and whether or not this employee has been assigned a default department).
- **Smart Clocking Action**: When an employee smart clocks, the clock can behave in one of the following ways:
  - The clock can use the Department **Prompting Method** selected above. If a department code is not entered, the Employee's assigned Default Department will be used.
  - The clock can automatically use the Employee's default Department. (The **Employee's Default Department** can be set on the Required tab of the Employee Administration page.)
  - The clock can use its own default Department. (Based on the **Clock's Default Department** set on this tab.)
- Select a **Delimiter** to be used when smart clocking. These are the keys used to separate the department code from the badge code.

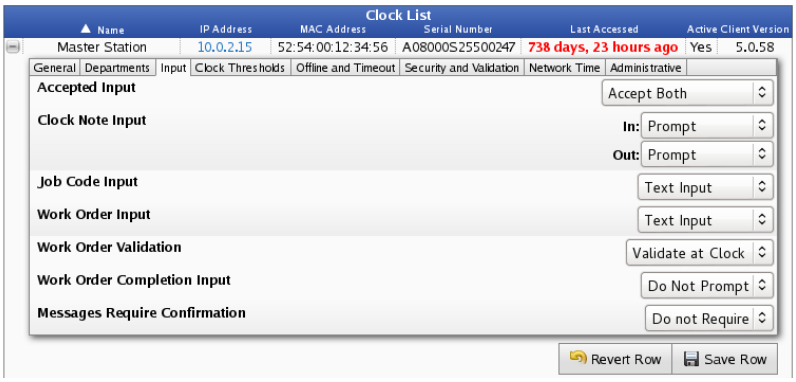
EXAMPLE: If the Delimiter is ** and employee with badge number 1003 wants to smart clock in to the produce department which has a department code of 2, the employee will type 21003. (department code) + (delimiter) + (employee badge number)**

- Only the departments listed in the **Associated Departments** list are allowable when employees punch this clock.This is also the list of departments employees will see displayed if the "Select From List" Department Prompting Method is chosen.
- Click on the **Save Row** button to apply the settings.

"Do Not Prompt (Accepts Smart Clocking)" is the most commonly used Department Prompting Method. Although it is really the only option compatible with the Smart Clocking Actions, here is a table of the 9 different combinations and their outcomes.

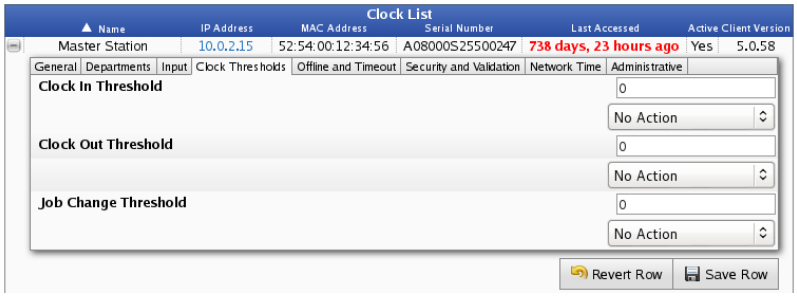
Department Promting Method	**Smart Clocking Action**	**Employee's action at the clock**	**Result**
Text Input	Use Department Prompting Method or Employee's Default	Employee types in his badge number. He is then prompted to enter his department code. 1. He enters the code correctly. 2. He enters the code incorrectly. 3. He does not enter a code, but instead just hits enter.	1. **He is clocked in to that department.** 2. **Clock will prompt again to enter a department code.** 3. **He is clocked in with NO department specified.**
Text Input	**Always Use Employee's Default**	1. Employee with a default dept assigned enters his badge number. 2. Employee with NO default dept assigned enters his badge number.	1. **He is automatically clocked in to his Default Dept without being prompted to enter a dept code.** 2. **He is clocked in with NO dept without being prompted to enter a dept code.**
Text Input	**Always Use Clock's Default**	Employee types in his badge number.	**He is automatically clocked in to the Clock's Default Dept without being prompted to enter a dept code.**
Select From List	Use Department Prompting Method or Employee's Default	Employee types in his badge number.	He is presented with a list that includes: None, Emp. Default, Clock Default, and all the Associated Departments (In this case: 1 Meat, 2 Produce, 3 Dairy.) **What ever he selects, he is clocked in with.**
Select From List	**Always Use Employee's Default**	Employee types in his badge number.	**He is automatically clocked in to his Default Dept without being prompted to select from a list.**
Select From List	**Always Use Clock's Default**	Employee types in his badge number.	**He is automatically clocked in to the Clock's Default Dept without being prompted to select from a list.**
Do Not Prompt (Accepts Smart Clocking)	**Use Department Prompting Method or Employee's Default**	1. Employee with a default dept assigned enters his badge number. 2. Employee with NO default dept assigned enters his badge number. 3. Employee enters a dept code, the delimiter, and his badge number.	1. **He is automatically clocked in to his Default Dept.** 2. **He is clocked in with NO dept.** 3. **He is clocked in to that department.**
Do Not Prompt (Accepts Smart Clocking)	**Always Use Employee's Default**	1. Employee types in his badge number. 2. Employee enters a dept code, the delimiter, and his badge number.	1 & 2. **He is automatically clocked in to his Default Dept or NO dept if he does not have a default dept assigned.**
Do Not Prompt (Accepts Smart Clocking)	**Always Use Clock's Default**	1. Employee types in his badge number. 2. Employee enters a dept code, the delimiter, and his badge number.	1 & 2. **He is automatically clocked in to the Clock's Default Dept.**

Input Tab



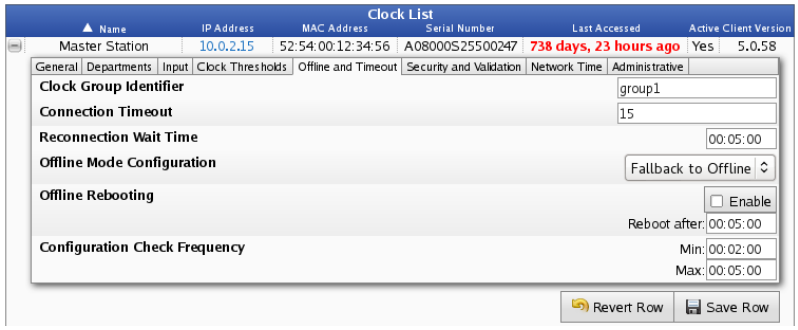
- Choose the **Accepted Input**. If using only automatic input devices, such as barcode scanners or proximity card readers, you may wish to set the Accepted Input Method to "Smart Clocking Only" in order to disable the "Explicit Clock In" and "Clock Out" functions, which are designed to be used with a keypad. Set "Accepted Input Method" to "Explicit Clocking Only" to require employees to specify whether they are clocking in or clocking out. This behavior is recommended to help identify missed clocks and simplify those corrections.
- When using Explicit Clocking, the **Clock Note Input** settings control whether or not the employee will be presented with a prompt for a clock note when clocking in and/or clocking out.
- **Job Code Input**: When using Explicit Clocking, select "Text Input" to allow a job code to be typed with the keypad or input with a card reader or barcode scanner. Select "Select From List" to present a scrollable list that can be navigated using the up and down arrows on the keypad. Select "Do Not Prompt" to skip this prompt. If no jobs are configured and active in Job Administration, this setting is ignored and no prompt will be presented.
- **Clock Note Input**: When using Explicit Clocking, select "Text Input" to allow a work order code to be typed with the keypad or input with a card reader or barcode scanner. Select "Select From List" to present a scrollable list that can be navigated using the up and down arrows on the keypad. Select "Do Not Prompt" to skip this prompt. If no work orders are configured and active in Work Order Administration, or if Job Code Input is set to "Do Not Prompt", this setting is ignored and no prompt will be presented.
- **Work Order Validation**: Decide whether a work order is validated immediately at the clock or by the server when an employee speifies a work order code.
- When using Explicit Clocking, the **Work Order Completion Input** settings control whether or not the employee will be presented with a prompt for work order completion when clocking out or changing jobs. Enabling this option may cause clocking to take longer. Completion will only be requested when the clock is not in offline mode.
- **Messages Require Confirmation**: When there are messages to be displayed for an Employee at the clock, you can require that the employee confirm having read the message before accepting any clock attempts.
- Click on the **Save Row** button to apply the settings.

Clock Thresholds Tab



- **Clock In Threshold**: When clocking in, if an employee has already clocked in, clocked out, or changed jobs within this many seconds, take the specified action. Setting this to '0' will disable the action.
- **Clock Out Threshold**: When clocking out, if an employee has already clocked in, clocked out, or changed jobs within this many seconds, take the specified action. Setting this to '0' will disable the action.
- **Job Change Threshold**: When changing jobs, if an employee has already clocked in, clocked out, or changed jobs within this many seconds, take the specified action. Setting this to '0' will disable the action.
- Click on the **Save Row** button to apply the settings.

Offline and Timeout Tab



- The **Clock Group Identifier** is used as a way to associate various clocks into groups for organizational purposes. When offline events are received from a clock, they will be played back automatically if all clocks in the same group are online. Click here to view the Clock Distribution helper to see if there are employees clocking across group identifiers.
- The **Connection Timeout** is the number of seconds this clock should wait for a response from the server before switching to offline mode.

Note: This clock only checks in "Fallback to Offline" mode.

- The **Reconnection Wait Time** is the number of seconds this clock should wait before attempting to reconnect to the server.

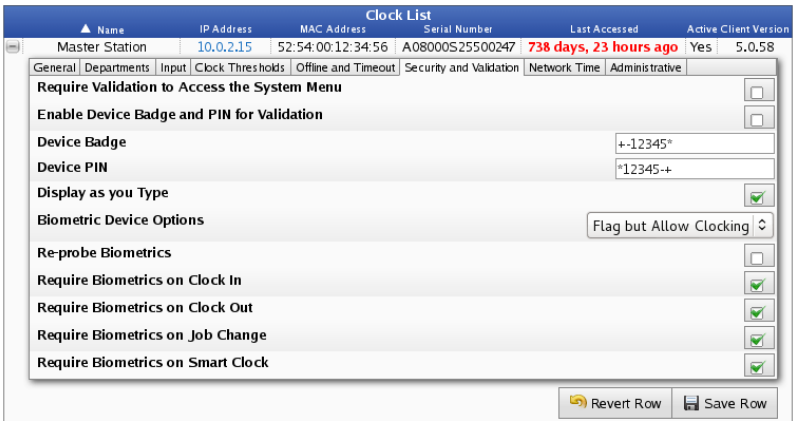
Note: This clock only checks in "Fallback to Offline" mode.

- Choose from the following **Offline Mode Configuration** options.
  Fallback to Offline (default): If selected, this clock will assume online operation, and will fallback to offline mode if the connection timeout above expires. It will attempt to reconnect periodically (configured through "Reconnection Wait Time" above). This is the default mode and should work for most installations.

  Require Offline: If selected, this clock will assume that it is not connected and will store data. This clock will periodically attempt to send data (configured through "Reconnection Wait Time" above). This is for installations that have intermittent connections, high-latency connections, or no connection at all.

  Require Online: If selected, this clock will refuse to process any events in the case that it is no longer connected to the server. After a configurable wait period, the clock will reboot in an attempt to restart the network connection.
- **Offline Rebooting**: ome network configurations may prevent an Offline Clock from coming back Online without a full reboot. Enabling this option will direct the Clock to automatically reboot itself when offline.
  If the clock is still offline after rebooting, accept offline clocks for this period of time, then reboot again. If the clock has been operating for more than this time, going offline will trigger an immediate reboot.
- **Configuration Check Frequency**: TimeIPS clocks periodically check for new or updated employees, jobs, work orders, etc., and changes to their configuration. Checking frequently keeps the clock, server and network busy, but allows changes to take effect quickly. Default is **two minutes** to **five minutes**, and this works well for most situations. If you have more than 10 clocks, you may want to check less frequently.
- Click on the **Save Row** button to apply the settings.

Security and Validation Tab

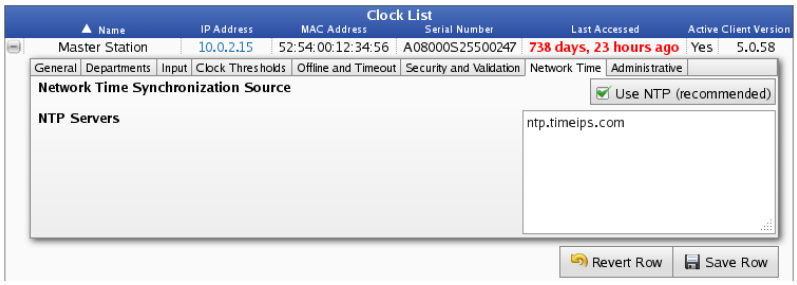


- Check the **Require Validation to Access the System Menu** box to require a valid Badge and PIN number to access the System Menu.
  (A Badge and PIN are valid if they belong to a user with "Full Access" or "Clock Configuration" permissions.)
  If not selected, simply press enter if prompted for a Badge and/or PIN to access the system menu.

Note: Enter the System Menu by pressing the Enter key.

- Check the **Enable Device Badge and PIN for Validation** box to allow the static Device Badge and PIN combination below to access the System Menu. (If enabled, this allows access in addition to a valid Badge number and PIN as described above.)
- Enter a **Device Badge** number to be used at the clock to allow access to the System Menu.
- Enter a **Device PIN** number to go with the Badge number above to access the System Menu.
- Check the **Display as you Type** box to show real input instead of "***". PIN prompts will still hide user input.
- The **Biometric Device Options** setting defines biometric device behavior at this clock.
  If **Require Biometrics** is selected, the clock WILL NOT accept employee punches if the biometric device is disconnected or unavailable. The clock will restart periodically in an attempt to reactivate the biometric device.
  If **Flag but Allow Clocking** is selected, the clock WILL accept employee punches if the biometric device is disconnected or unavailable. All punches accepted will have an audit flag set indicating that biometric validation was unavailable.
  If **Disable Biometrics** is selected, biometric validation will not be used. This overrides any other global or per-employee biometric requirements.
- Check the **Re-probe Biometrics** box to force this clock to detect and load new biometric hardware. Use this option when biometrics have been added or removed from a clock and the change is not detected automatically.
- To **Require Biometrics on Clock In**, check the box.
- To **Require Biometrics on Clock Out**, check the box.
- To require biometrics when explicitly changing jobs, check the **Require Biometrics on Job Change** box.
- To **Require Biometrics on Smart Clock**ing, check the box.
- Click on the **Save Row** button to apply the settings.

Network Time Tab

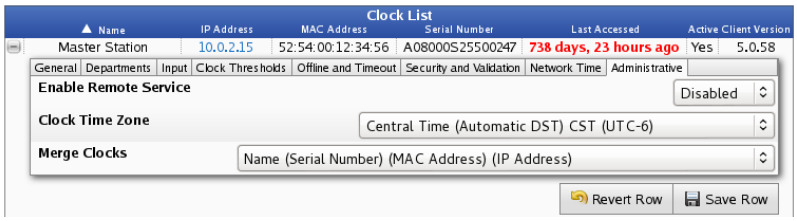


- Check the **Network Time Synchronization Source** box to use NTP for this clock. NTP is recommended for the most accurate and stable time, but requires UDP on port 123 to be open. If NTP does not work on your network, uncheck the box and the clock will make a periodic time request from its Master Station.
- Enter the **NTP Servers** address that this clock should use for network time synchronization. Normally, this would be the IP of TimeIPS server or ntp.timeips.com.

Note: Port 123 with UDP must be open or forwarded for NTP to work.

- Click on the **Save Row** button to apply the settings.

Administrative Tab



- The **Enable Remote Service** option controls your network clocks. Each time a network clock checks in with a server, it will take the action selected from drop down list. There may be a significant delay in the application of your selection.
  - **Disabled**: Remote service will be turned off and disabled on the next check-in of the clock. After this check-in happens, the setting will switch to "No Change".
  - **Enabled**: Remote service will be turned on and activated. After this check-in happens, the setting will switch to "No Change".
  - **Reconnect**: Will try to force the clock to reconnect to remote service. This means that the next time the clock checks in, it will disconnect, then this option will auto-change to "Enabled", then on the next checkin it will go to "No Change".
  - **No Change**: Leaves the settings as they currently are. If remote service is currently enabled, it will stay enabled. If it is currently disabled, it will stay disabled.

Note: Remote Services for server systems are enabled under System Settings >> System Management.

- **Clock Time Zone**: Select the local time zone for this clock.
- **Merge Clocks**: Changing network settings or replacing a clock can cause it to show multiple times on the clock list. Use this option to merge a duplicate clock record into the clock currently being viewed. This operation cannot be undone.
- Click on the **Save Row** button to apply the settings.

See Also:
Global Clock Settings
Clock Configuration

Configuring and Installing a Network Clock

Not all TimeIPS systems include a Network Clock. If yours does, please see the Installation Guide for standard configuration and installation instructions. If you need a copy of the manual, please contact TimeIPS technical support or visit support.timeips.com under Downloads.

Advanced Network Options

The TimeIPS network clocks can be configured to look for a server at any IP or domain name. You can plug a USB keyboard into the clock to type a domain name. Or, you can log into the clock from a PC (point your web browser to the IP of the clock) and set it that way.

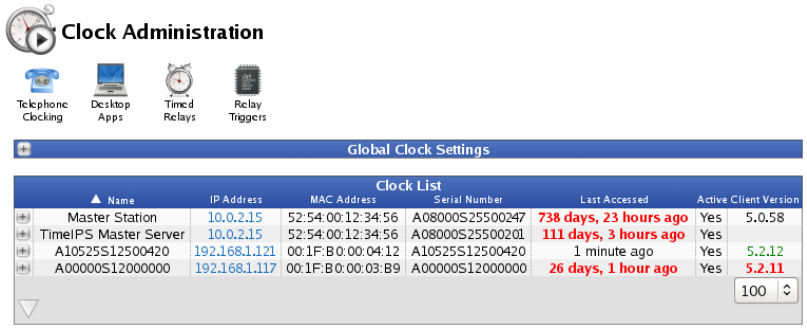
TimeIPS network clocks can be configured to talk on any port that you want. Specify the port by putting a / or : after the domain. For example:

timeserver.mycompany.com:8080
timeserver.mycompany.com/8080

Global Clock and New Clock Settings

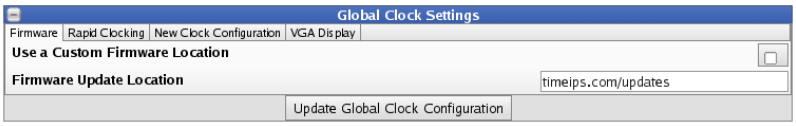
Settings that apply to all clocks, and settings that will be applied to new clocks when they are registered with TimeIPS.

Using the left pane Main Menu » Administration, click on: Clocking » Clock Configuration



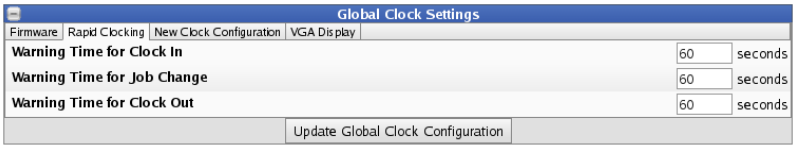
Click on the **+** (plus) sign on the left side of the **Global Clock Settings** bar.

Firmware Tab



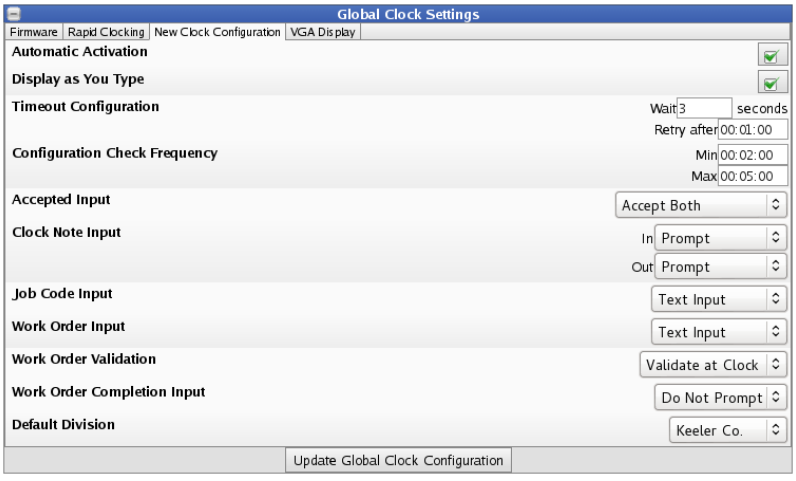
- **Use a Custom Firmware Location**: If you have clocks on remote networks, leave this box unchecked so clocks will download firmware updates directly from timeips.com/updates. If all your clocks are on your local area network (LAN), or if you have one or more clocks that cannot route network traffic to TimeIPS servers, check this box and use "master" for the Firmware Update Location below.
- **Firmware Update Location**: Specify a network address for your clocks to download firmware updates. Use the keyword "master" to designate this TimeIPS server (recommended if all of your clocks are on a Local Area Network). If this server is port-forwarded to an external IP address, put that address here.
- Click on the **Update Global Clock Configuratoin** button to apply the settings.

Rapid Clocking Tab



- **Warning Time for Clock In:** Generate a warning if an employee tries to clock in this soon after clocking.
- **Warning Time for Job Change**: Generate a warning if an employee tries to change jobs this soon after clocking.
- **Warning Time for Clock Out**: Generate a warning if an employee tries to clock out this soon after clocking.
- Click on the **Update Global Clock Configuratoin** button to apply the settings.

New Clock Configuration Tab

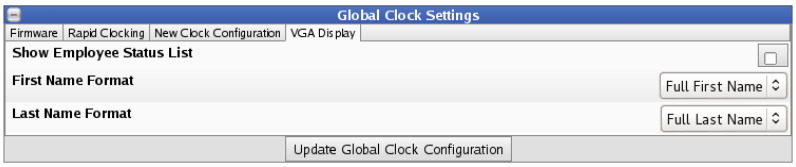


- Check the **Automatic Activation** box to allow all new clocks to be automatically activated. Unchecking the box will stop any new or unauthorized clocks from connecting.
- Checking the **Display as You Type** box will instruct new clocks, and clocks without specialized settings to use the "Display as You Type" feature, printing out keyboard input to the small LCD display that ships with all TimeIPS Clocks.

Note: The recommended setting for clocks equipped with swipe badge readers or barcode scanners is "OFF." If you find your reader or scanner missing digits, disable this setting.

- **Timeout Configuration** is the number of seconds clocks will wait for a server response before going into offline mode.
- TimeIPS clocks periodically check for new or updated employees, jobs, work orders, etc., and changes to their configuration. Checking frequently keeps the clock, master and network busy, but allows changes to take effect quickly. The **Configuration Check Frequency** default is between two and five minutes, and this works well for most situations. If you have more than 10 clocks, you may want to check less frequently.
- If using only automatic input devices, such as barcode scanners or proximity card readers, you may wish to set the **Accepted Input** method to "Smart Clocking Only" in order to disable the explicit "Clock In" and "Clock Out" functions, which are designed to be used with a keypad.
  Set to "Explicit Clocking Only" to require employees to specify whether they are clocking in or clocking out. This behavior is recommended to help identify missed clocks and simplify those corrections.
- When using Explicit Clocking, the **Clock Note Input** settings control whether or not the employee will be presented with a prompt for a clock note when clocking in or clocking out.
- **Job Code Input**: When using Explicit Clocking, select "Text Input" to allow a job code to be typed with the keypad or input with a card reader or barcode scanner. Select "Select From List" to present a scrollable list that can be navigated using the up and down arrows on the keypad. Select "Do Not Prompt" to skip this prompt. If no jobs are configured and active in Job Administration, this setting is ignored and no prompt will be presented.
- **Work Order Input**: When using Explicit Clocking, select "Text Input" to allow a work order code to be typed with the keypad or input with a card reader or barcode scanner. Select "Select From List" to present a scrollable list that can be navigated using the up and down arrows on the keypad. Select "Do Not Prompt" to skip this prompt. If no work orders are configured and active in Work Order Administration, or if Job Code Input is set to "Do Not Prompt", this setting is ignored and no prompt will be presented.
- **Work Order Validation**: Decide whether a work order is validated immediately at the clock or by the server when an employee speifies a work order code.
- **Work Order Completion Input**: When using Explicit Clocking, these settings control whether or not the employee will be presented with a prompt for work order completion when clocking out or changing jobs. Enabling this option may cause clocking to take longer. Completion will only be requested when the clock is not in offline mode.
- The **Default Division** is the division that new clocks will be added into.
- Click on the **Update Global Clock Configuratoin** button to apply the settings.

VGA Display Tab



- Check the **Show Employee Status List** box to have IPS200T/300T series systems show an employee status list on an optional large (VGA) display. Not recommended for more than 100 employees.
- Choose a **format** to use for displaying a **First Name** on the VGA display status list.
- Choose a **format** to use for displaying a **Last Name** on the VGA display status list.
- Click on the **Update Global Clock Configuratoin** button to apply the settings.

TimeIPS Telephone Clocking System

Using the TimeIPS Telephone Clocking system, employees can clock in/out, record a clock note, check current status, and listen to messages. Employers can allow or deny access to status checks and messages as well as to the clock in/out feature by Caller ID. Employers can also require PIN numbers for employee identification.

NOTE: Telephone clocking is only available with the purchase of a TimeIPS VoIP device. Contact your TimeIPS sales representive for more details.

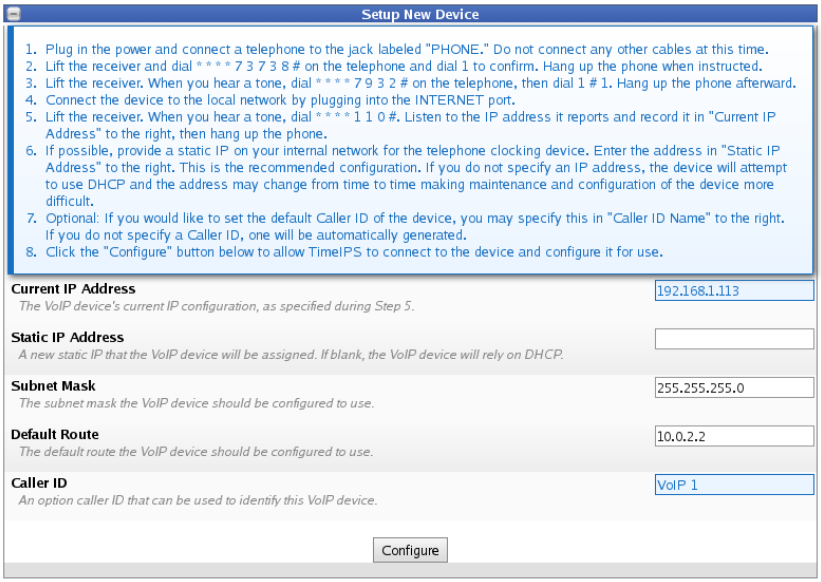
Using the left pane Main Menu » Administration, click on: Clocking » Telephone Clocking

Initial Configuration

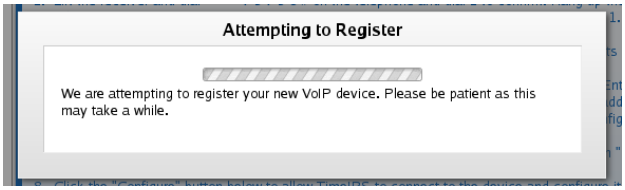
Initial configuration requires Internet access to http://updates.timeips.com. If you have difficulty performing the initial configuration, please ensure that your firewall and/or content filters allow access to our update server.

Tip: Use the IPSVOIP TimeIPS Telephone Remote Clocking guide included with your device to install and configure the device on your network.

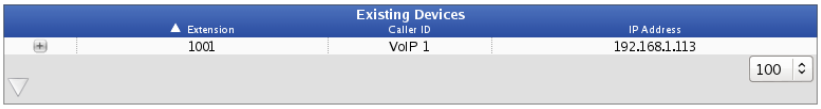
- Click on the **+** (plus) sign to the left of **Setup New Device**.
- Follow the step-by-step instructions in the top blue box.



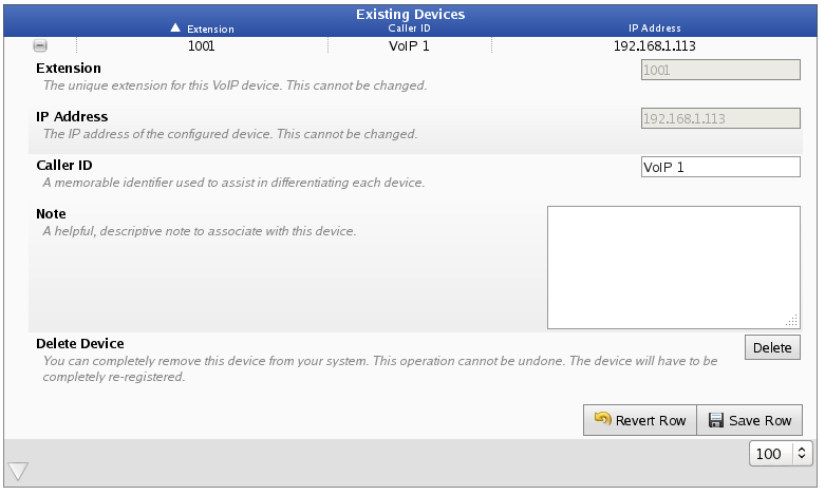
- Once you hit **Configure**, an **Attempting to Register** box pops up, then disappears when it's finished.



- Configured Devices then appear in the **Existing Devices** list.



- Click on the **+** (plus) sign to the left of the configured device to review, edit, and even delete the device from your system.



Manually Setting a Static IP Address

When configuring a VoIP device it is easiest to set its IP address through the web interface as shown above. For some network configurations, such as networks that only allow static addresses, this is not an option as the device must first be on the network to communicate with TimeIPS. In this case, it might be necessary to manually set a static IP address for the device using an attached analog phone.

1. Connect an analog phone to the jack labeled **Phone** on the VOIP box. Ensure that the network cable is NOT connected.
2. Pick up the phone and **Dial ******. You will hear a voice that asks for you to enter an option.

NOTE: If you would like to *Restore to Factory Default*: Enter 73738#. You will then be told to hang up. You will need to dial ** again to re-enter the configuration menu.**

---

3. Enter **101#**. It will then ask you to enter a value.
4. Enter **1#**. It will then say "To save press 1."
5. **Press 1 to save.** This will take you back to the configuration menu.
6. Enter **111#**. It will then ask you to enter a value followed by the pound key.
7. This is where you will **enter the IP** you wish the VOIP device to use.

NOTE: Use * for dots. Example 192*168*1*101.

---

8. After you enter the IP address, **press #**. To save **press 1**.
9. Enter **121#**. It will then ask you to enter a value followed by the pound key.
10. This is where you will **enter the subnet mask** you wish the VOIP device to use.

NOTE: Use * for dots. Example 255*255*255*0.

---

11. After you enter the netmask, **press #**. To save **press 1**.
12. Enter **131#**. It will then ask you to enter a value followed by the pound key.
13. This is where you will **enter the default gateway** you wish the VOIP device to use.

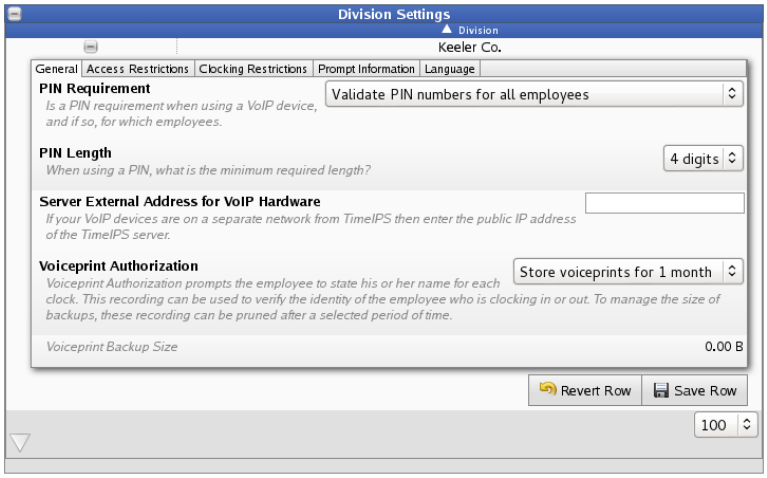
NOTE: Use * for dots. Example 192*168*1*1.

---

14. After you enter the gateway, **press #**. To save **press 1**.
15. Hang up the phone. You may need to give the system a couple of minutes to restart.

Division Settings

- Click on the **+** (plus) sign to the left of your division.



PIN Requirement

1. Select the **PIN Requirement** using the drop down list..
    - **Do not validate PIN numbers for any employee**: A PIN number will not be required when accessing the TimeIPS Telephone Clocking system.
    - **Validate PIN numbers for all employees**: A PIN number will be required for all employees when accessing the TimeIPS Telephone Clocking system.
    - **Validate PIN numbers for employees with "Require PIN" set**: A PIN number will be required for employees with "Require PIN" selected in the employee's record on the Employee Administration page.

    NOTE: The employee's "PIN Number", "Require PIN" check-box, and "Force Re-Registration" check-box are stored on the employee's Personal tab of the Employee Administration page.

2. Select the minimum **PIN Length** using the pull-down.
3. Click on the **Save Row** button.

Server External Address for VoIP Hardware

When TimeIPS and the VoIP device are on the same network, this option is unnecessary. If the VoIP device is on a separate network, you will need to provide the public IP address of your TimeIPS server. This tells the VoIP device how to properly communicate back to TimeIPS when phone calls arrive.

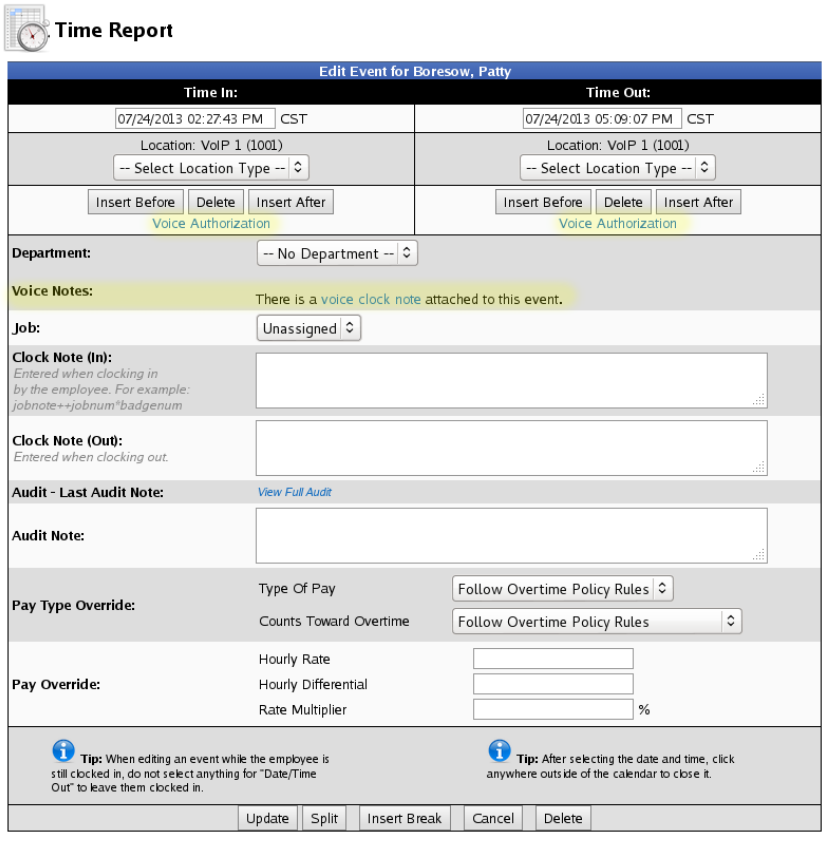
Voiceprint Authorization

Voiceprint Authorization prompts the employee to state his or her name for each clock. This recording can be used to verify the identity of the employee who is clocking in or out. To manage the size of backups, these recording can be pruned after a selected period of time.

The following **Voiceprint Authorization** recording options are available:

- Do not record voiceprints
- Store voiceprints for 1 month
- Store voiceprints for 2 months
- Store voiceprints for 3 months
- Store voiceprints for 4 months
- Store voiceprints for 6 months
- Store voiceprints for 9 months
- Store voiceprints for 1 year

To access either the employee's recorded Voiceprint Authorization or a clocking note recorded by the employee, go to **Reports -> Time Edit/Report** and run a Time Report for the employee for the date in question.

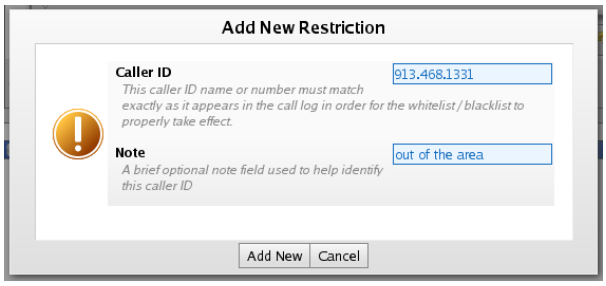


Access Restrictions

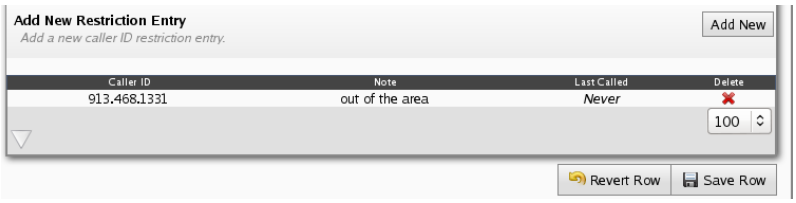
Under Access Restrictions, you can control which phone numbers will be granted access when calling your TimeIPS Telephone Clocking system.

1. Select the **Access Restriction** method using the pull-down.
    - **Do not restrict access by Caller ID**: All phone numbers will be able to call the TimeIPS Telephone Clocking System to check status and get messages.
    - **Do not restrict access, but record Caller ID**: All phone numbers will be able to call the TimeIPS Telephone Clocking System and the Caller ID will be recorded in the Caller ID Logging section.

      NOTE: You do not need to list phone numbers you wish to be logged. When this option is selected, the caller ID from all incoming calls will be logged.
    - **Deny access to the following Caller IDs (blacklist)**: All listed Caller ID names/numbers will be denied access to the TimeIPS Telephone Clocking system.
    - **Only allow access to the following Caller IDs (whitelist)**: Only listed Caller ID names/numbers will be allowed to access the TimeIPS Telephone Clocking system.
2. If creating a **Whitelist** or **Blacklist** to restrict caller access, the option to Add New entries will appear.
3. Under **Add New Restriction Entry**, click the "Add New" button.



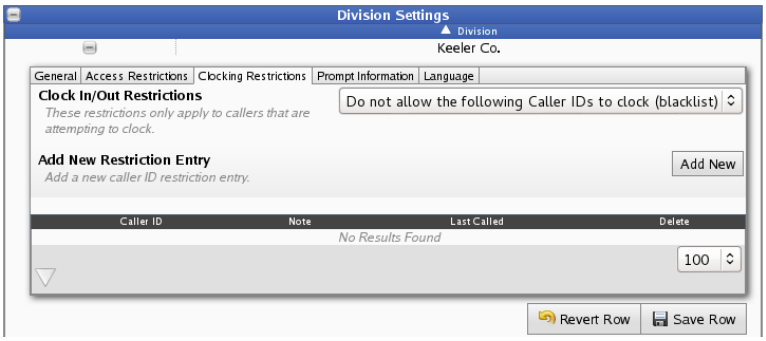
4. In the Caller ID field, enter the name or number exactly as it appears in the call log.
5. (OPTIONAL) Add a brief **Note** to help identify the Caller ID.
6. Click "Add New" to save.
7. All restricted Caller IDs appear in the list below. This list also records their last call-in and provides deletion of the entry. Just click the red **X** and confirm deletion.



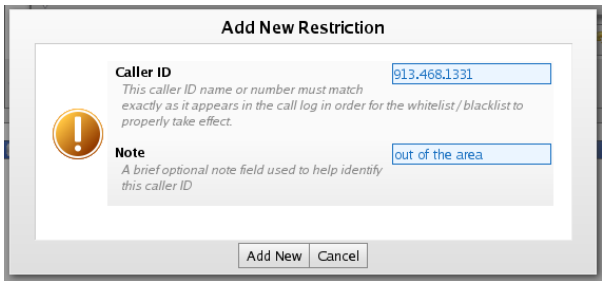
TIP: If you will be creating a "Whitelist" or a "Blacklist" but are unsure of the Caller IDs, you can temporarily set the Access Restrictions to "Do not restrict access, but record Caller ID" and set the Clock In/Out Restrictions to "Only allow the following Caller IDs to clock". Then, have each of the authorized phones call in. The TimeIPS Telephone Clocking system will answer their call and record their Caller ID in the Caller ID Logging but will not allow them to clock. You can then generate your "Whitelist" or "Blacklist" and adjust the restriction levels accordingly.

Clocking Restrictions

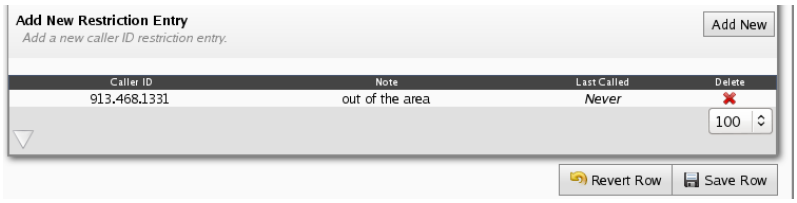
Clocking Restrictions operate similiarly to Access Restrictions, but do not block complete access. Under Clocking Restrictions, you can control which phone numbers will be allowed to access your TimeIPS Telephone Clocking system, but are not allowed to clock in or out. These restricted numbers would still be able to check their status and listen to messages from their managers.



1. Select the **Clock In/Out Restriction** method using the pull-down.
    - **Do not allow the following Caller IDs to clock (blacklist)**: All listed Caller ID names/numbers will not be allowed to clock in/out from the TimeIPS Telephone Clocking system but will be able to check status and listen to messages.
    - **Only allow the following Caller IDs to clock (whitelist)**: Only listed Caller ID names/numbers will be allowed to clock in/out from the TimeIPS Telephone Clocking system, check status, and listen to messages.
2. Under **Add New Restriction Entry**, click the "Add New" button.



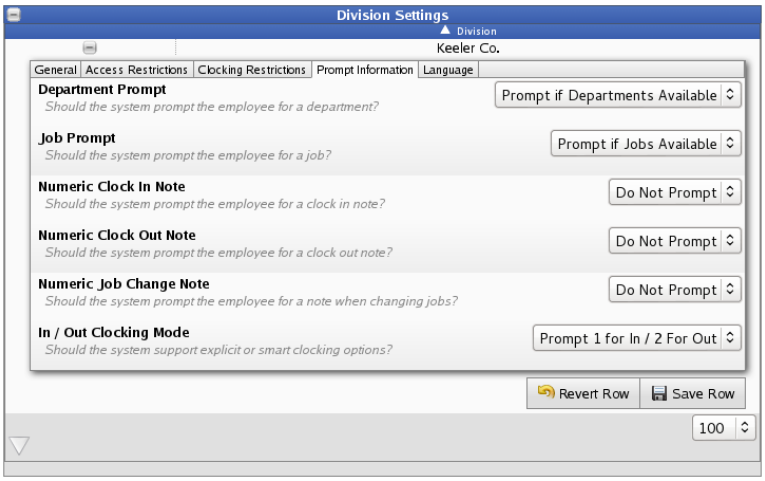
3. In the Caller ID field, enter the name or number exactly as it appears in the call log.
4. (OPTIONAL) Add a brief **Note** to help identify the Caller ID.
5. Click "Add New" to save.
6. All restricted Caller IDs appear in the list below. This list also records their last call-in and provides deletion of the entry. Just click the red **X** and confirm deletion.



Prompt Information

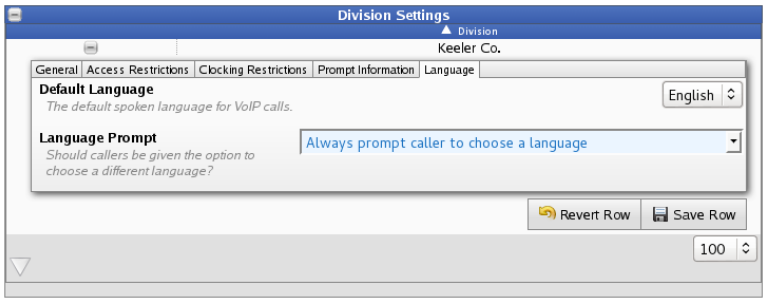
When employees use the telephone clocking method, they may be prompted to enter the following information: a **Department**, **Job**, **Numeric Clock In** or **Out Note**, or N**umeric Job Change Note**.

In addition, you need to decide which **Clocking Mode** the system will support: explicit or smart clocking options. Explicit means the system will prompt employees to press 1 to clock In and 2 to clock Out. WIth smart clocking, the employee just presses 1 to clock in or out.



Language

The language employees hear when they call in can be set to play in English or Spanish automatically by selecting it as the **Default Language**.



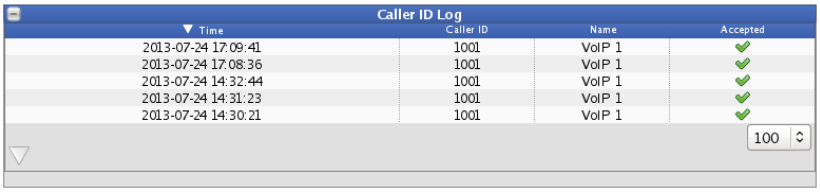
The system can also be set to prompt callers each time to **Choose a Language** or to prompt them the first time and then **Remember their choice** for future calls from that particular Caller ID.

Caller ID Log

If the Access Restrictions option is not set to "Do not restrict access by Caller ID", the Caller ID Log will contain a list of all calls received by the TimeIPS Telephone Access system.

- Click on the **+** (plus) sign to the left of the Caller ID Log bar to review the list.

Note: The TimeIPS telephone expects caller ID information to be in the standard North American "Bellcore" format. When connecting to a PBX system, be sure caller ID is provided in this format.



Internal Information (visible to Administrators only):

Asterisk DID into TimeIPS:

Email to customer:

Here's what I'll need from you to get your Asterisk system connected to TimeIPS:

1) IP address of your Asterisk system
2) A password to authenticate your Asterisk system

In your Asterisk's extensions.conf, you'll add an extension for TimeIPS. If the extension is 1234, it would be like this:

exten => 1234,1,Dial(SIP/1100/1100,20)
exten => 1234,2,Hangup

And in your Asterisk's sip.conf, you'll add

```
; TimeIPS
[1100]
type=friend
allow=ulaw
host=<your TimeIPS system's IP>
username=1100
internalcid=<callerID you'd like to see when CID is not available>
secret=<the password you selected in step 2>
insecure=very
context=default
canreinvite = no
```

If using digium's frontend, the SIP section will be something like Trunk_1, so the "Auth User" it MUST be set to 1100 also.

Manually edit the sip.conf on the customer's TimeIPS system and add a section like this:

```
[1100]
type=friend
username=1100
secret=<their password>
deny=0.0.0.0/0.0.0.0
permit=<their asterisk IP>/255.255.255.255
host=dynamic
context=incoming
dtmfmode=rfc2833
internalcid=Axcet HR Solutions
```

Manually edit extensions.conf, add to the incoming context
exten => <extension>,1,Goto(s,1)

IAX: Edit iax.conf (usually /etc/asterisk/iax.conf) and add the following:

```
[general]
bindport=4569  ;standard for IAX2
bindaddr=0.0.0.0
;bandwidth=low
allow=all                       ; same as bandwidth=high
jitterbuffer=no

; TimeIPS
[timeips]
type=friend
allow=ulaw
host=<your TimeIPS IP>
port=4569
insecure=very
username=timeips
secret=timeips
context=default
nat=yes
canreinvite = no
requirecalltoken=auto
```

If you'd like to use a different password, just let us know.

Then, in your dial plan (usually /etc/asterisk/extensions.conf) add an extension to reach TimeIPS.

Something like this:

```
exten => 1234,1,Dial(IAX2/timeips/0,20)
exten => 1234,2,Hangup
```

Then, reload asterisk:

```
asterisk -r
reload
```

Debugging:
tcpdump -s 0 -i eth0 -X port 5060

To use SIP where TimeIPS is behind NAT and Asterisk server is at an Internet IP:

```
[general]
context=default                 ; Default context for incoming calls
bindport=5060                   ; UDP Port to bind to (SIP standard port is 5060)
bindaddr=0.0.0.0                ; IP address to bind to (0.0.0.0 binds to all)
srvlookup=yes                   ; Enable DNS SRV lookups on outbound calls
externip=<externIP where TimeIPS is>
localnet=<localsubnet>/24
nat=yes
register => <extension>:<yourpassword>@your InternetIP or FQDN for asterisk system>/<extension>

[<extension>]
type=friend
allow=ulaw
host=<InternetIP or FQDN for asterisk system>
username=<extension>
internalcid=<callerID when not available>
secret=<yourpassword>
insecure=very
context=default
nat=yes
canreinvite = no
```

Use local computer to browse to a VOIP box on a remote network:

```
ssh root@remote.timeips.com -p 20** -L 8888:ipaddress_of_their_voip_box:80
```

Where ipaddress is the address on the remote network which you want to access, 8888 is the address you'll load on localhost and 20** is the remote service port.

DTMF Problems, especially with AT&T mobile phones, iPhones, etc.
In the VOIP box, set 61615 (DTMF Tx Method). to "InBand"
In asterisk, sip.conf, under [general] and [1001]

```
dtmfmode=inband
relaxdtmf=yes
```

ASP iax.conf:

```
[general]
bindport=4569  ;standard for IAX2
bindaddr=0.0.0.0
;bandwidth=low
allow=all                    ; same as bandwidth=high
jitterbuffer=no

[timeips12040]
type=friend
host=12.206.142.220
username=timeips12040
secret=12345
allow=ulaw
context=default
dtmfmode=rfc2833
insecure=very
nat=yes
canreinvite=no
```

See Also:
TimeIPS Telephone Clocking Menu
TimeIPS Telephone Clocking Manger's Menu
Using Telephone Clocking on the same line as a Fax Machine.
TimeIPS Telephone Clocking System
Telephone Clocking Language Options

TimeIPS Desktop Clocking Application

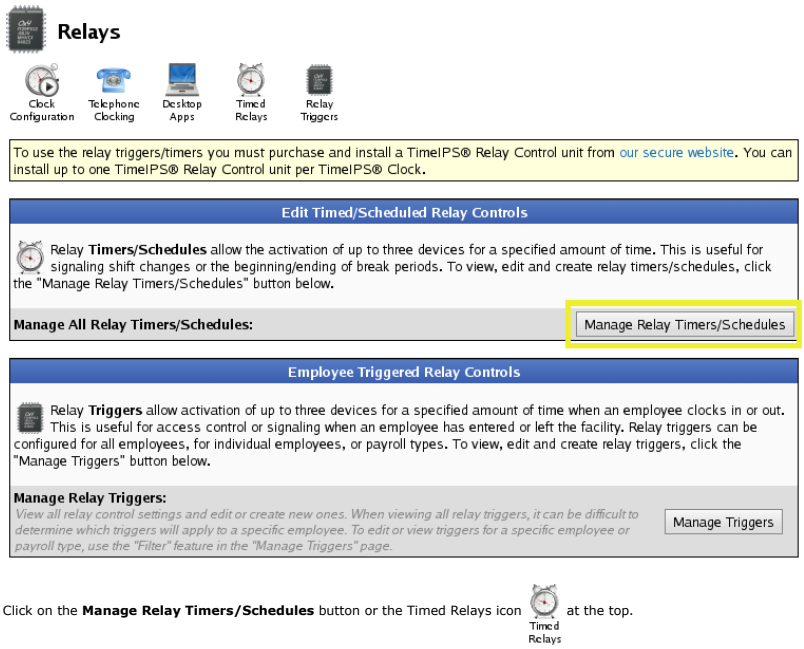
Please contact TimeIPS support for assistance with the desktop clocking application.

Manage Relay Timers/Schedules

Relay Timers/Schedules allow the configuraton of relays to trigger at set times to match your schedule. This is useful for signaling shift changes or the beginning/ending of break periods.

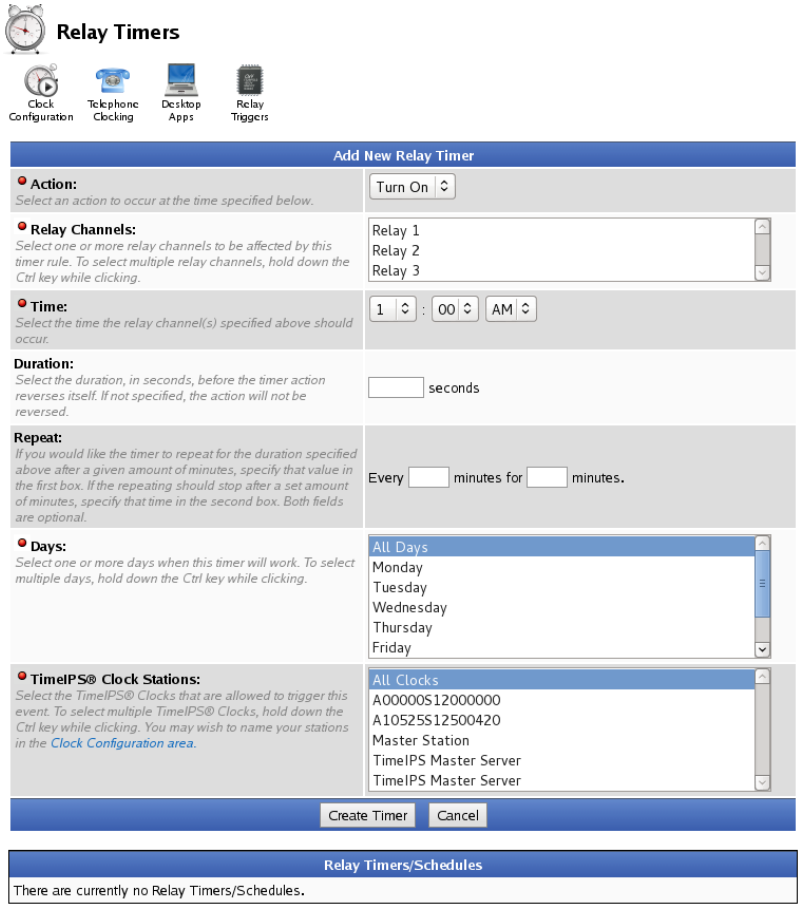
To use the relay triggers/timers you must purchase and install a TimeIPS® Relay Control unit from our secure website. You can install one TimeIPS® Relay Control unit per TimeIPS® Clock and activate of up to three devices for a specified amount of time.

Using the left pane Main Menu » Administration, click on: Clocking » Relay Controls



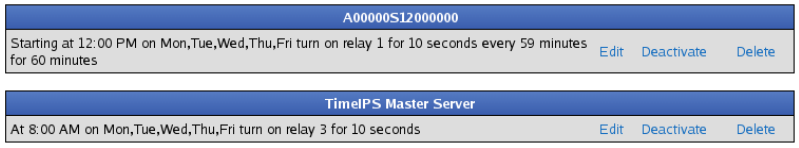
Click on the **Manage Relay Timers/Schedules** button or the Timed Relays icon

at the top.



Add a New Relay Timer

- Select an **Action** to occur at the time specified below.
- Select one or more **Relay Channels** to be affected by this timer rule. To select multiple relay channels, hold down the Ctrl key while clicking.
- Select the **Time** the relay channel(s) specified above should occur.
- Select the **Duration,** in seconds, before the timer action reverses itself. If not specified, the action will not be reversed.
- If you would like the timer to **Repeat** for the duration specified above after a given amount of minutes, specify that value in the first box. If the repeating should stop after a set amount of minutes, specify that time in the second box. Both fields are optional.
- Select one or more **Days** when this timer will work. To select multiple days, hold down the Ctrl key while clicking.
- Select the **TimeIPS® Clock Stations** that are allowed to trigger this event. To select multiple TimeIPS® Clocks, hold down the Ctrl key while clicking. You may wish to name your stations in the Clock Configuration area.
- Click the **Create Timer** button.



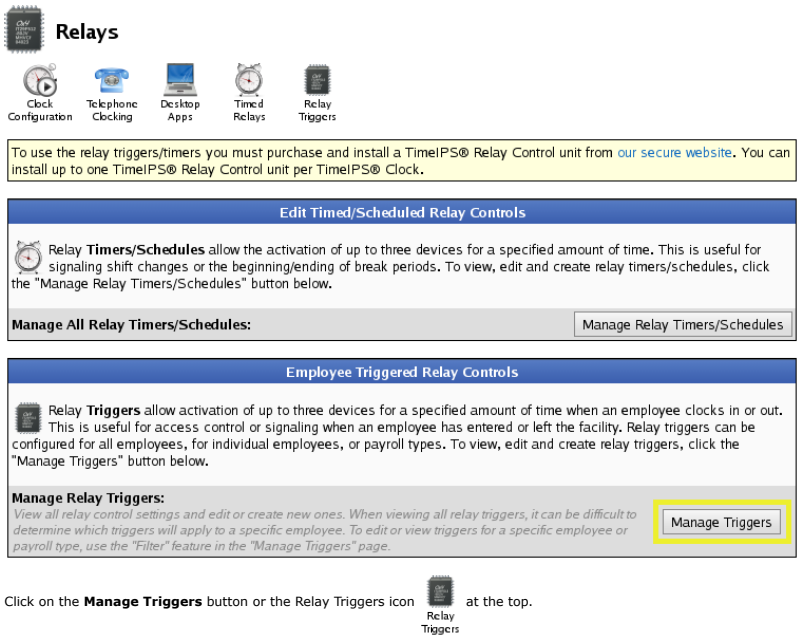
The created Relay Timers appear at the bottom of the page where they can Edited, Deactivated, or Deleted.

Manage Relay Triggers

Relay Triggers can be used to open doors or trigger lights/sounds when employees clock. This is useful for access control or signaling when an employee has entered or left the facility. Relay triggers can be configured for all employees, for individual employees, or payroll types. Up to three devices can be activated for a specified amount of time.

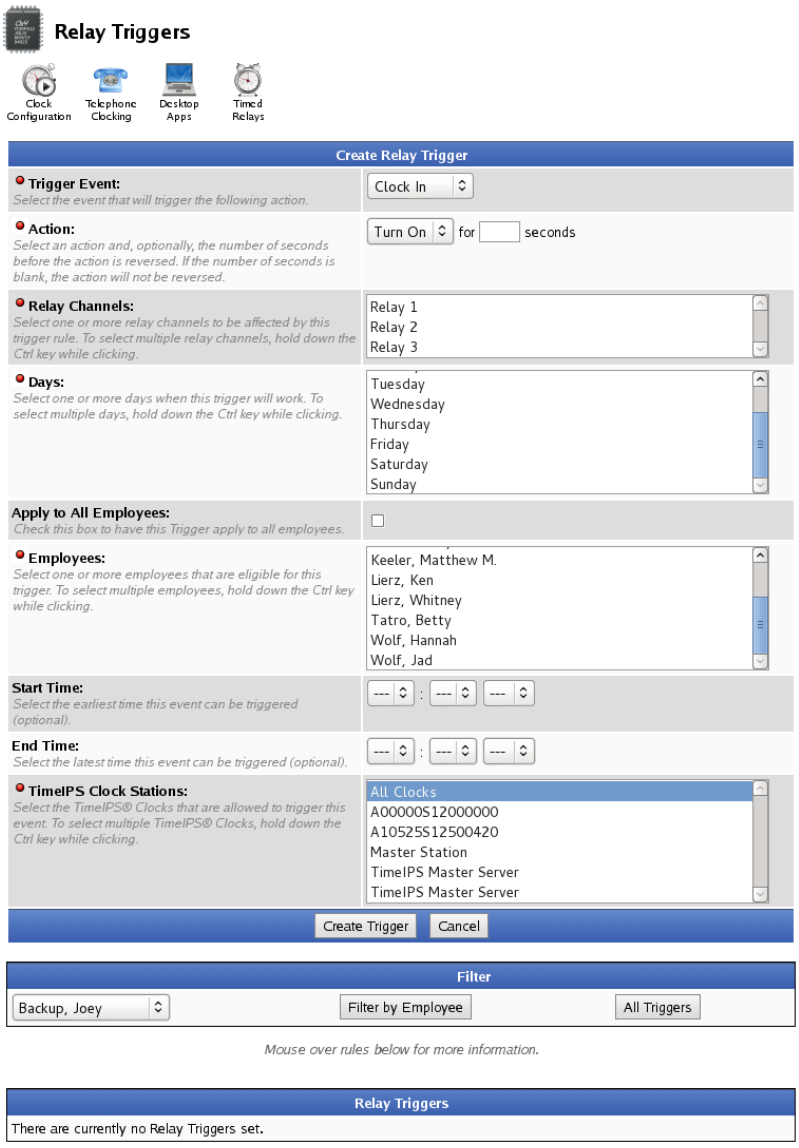
To use the relay triggers/timers you must purchase and install a TimeIPS® Relay Control unit from our secure website. You can install up to one TimeIPS® Relay Control unit per TimeIPS® Clock.

Using the left pane Main Menu » Administration, click on: Clocking » Relay Controls



Click on the **Manage Triggers** button or the Relay Triggers icon

at the top.



Create a Trigger

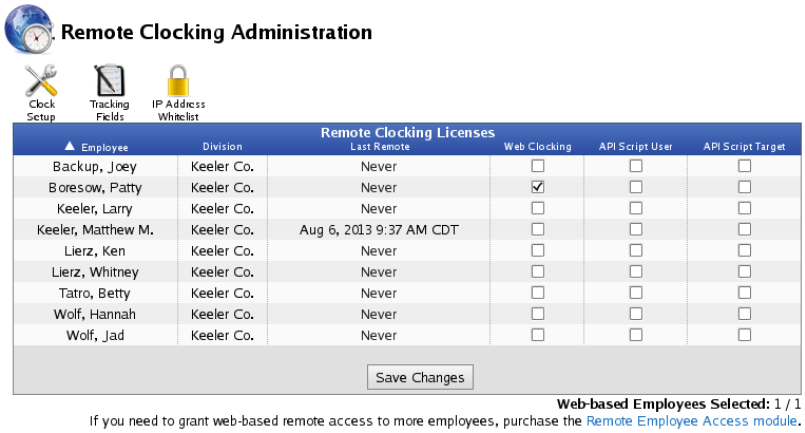
- Select the **Event** that will trigger the following action.
- Select an **Action** and, optionally, the number of seconds before the action is reversed. If the number of seconds is blank, the action will not be reversed.
- Select one or more **Relay Channels** to be affected by this trigger rule. To select multiple relay channels, hold down the Ctrl key while clicking.
- Select one or more **Days** when this trigger will work. To select multiple days, hold down the Ctrl key while clicking.
- Check this box to have this Trigger **Apply to All Employees**.
- Select one or more **Employees** that are eligible for this trigger. To select multiple employees, hold down the Ctrl key while clicking.
- **Starte Time:** Select the earliest time the this event can be triggered (optional).
- **End Time:** Select the latest time this event can be triggered (optional).
- Select the **TimeIPS® Clock Stations** that are allowed to trigger this event. To select multiple TimeIPS® Clocks, hold down the Ctrl key while clicking. You may wish to name your stations in the Clock Configuration area.
- Click the **Create Trigger** button.

- The created Relay Triggers appear at the bottom of the page where they can Edited, Deactivated, or Deleted.
- To view only triggers associated with a specific employee, find and select that employees name from the drop down menu. Click the **Filter by Employee** button and the results appear in the below.

Remote Clocking

Remote (Web/PC) clocking allows employees to clock in/out and check status using a web browser on any computer or web-enabled device, such as a smart phone.

Using the left pane Main Menu » Administration, click on: Clocking » Remote Clocking



To Grant Remote Clock Access

The ability to use remote clocking is set per-employee. This allows permitting some employees to clock from their PC or mobile device, while requiring others to use a walk-up clock or telephone clocking,

- Check or uncheck the "Web Clocking" checkbox corresponding to each employee to allow them to Web/PC clock.

NOTE: Remote clocking licenses are purchased in sets of 10. View the Employees Selected counter at the bottom right to identify the number of employees granted remote clocking access and the maximum number of employees available for remote clocking access.

NOTE: If you have one or more TimeIPS API Modules, you may also see the "API Script User" and "API Script Target" columns. These are used to control access to the API.

- Click on the **Save Changes** button to save the changes.

To set up the Clock, Tracking Fields or Whitelist, click on the icons at the top of the page and review the following support articles.

Clock Setup icon and correlating **support article**.

Tracking Fields icon and correlating **support article**.

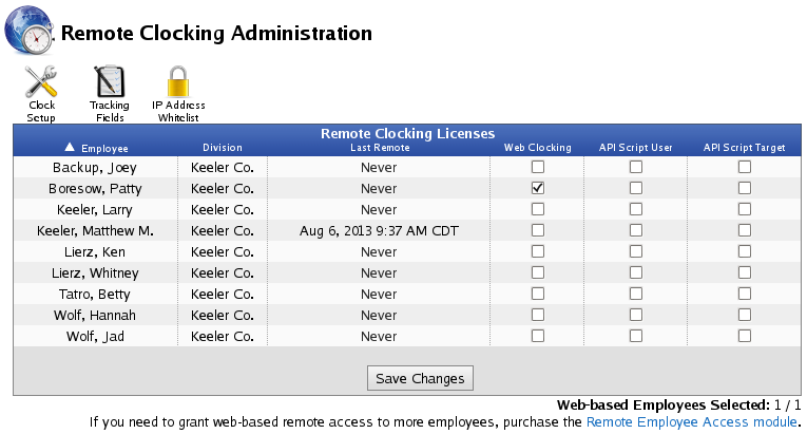
IP Address Whitelist icon and correlating **support article**.

See Also:
Remote Clock IP Whitelist
Tracking Fields
Remote Clock Interface
Remote Clock Setup

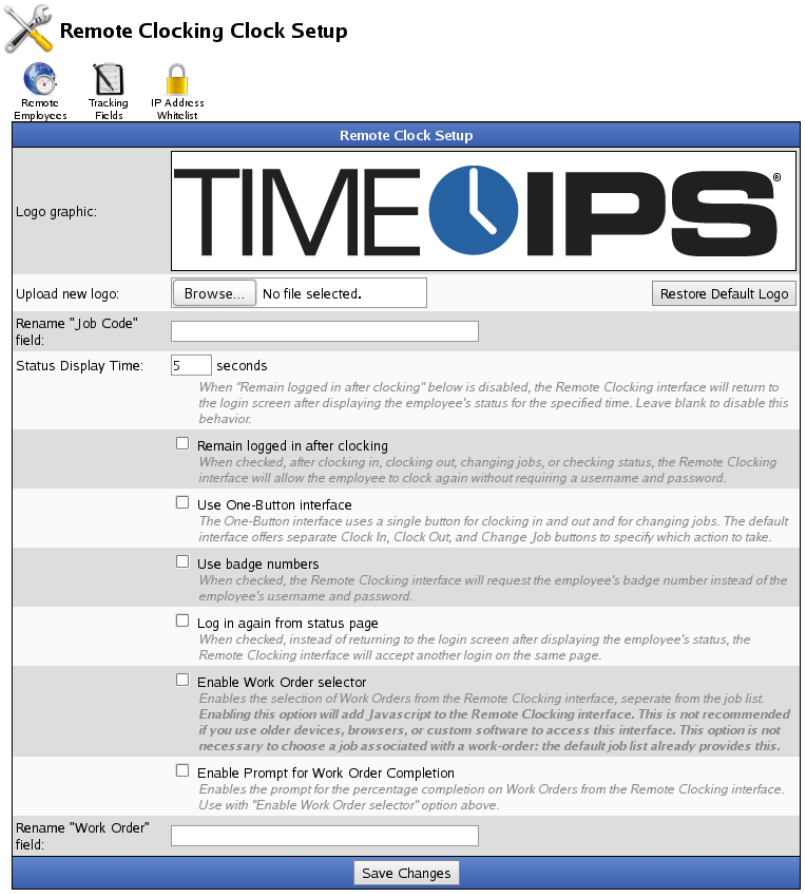
Remote Clock Setup

Remote Clock Setup allows viewing and managing remote clocking configuration options.

Using the left pane Main Menu » Administration, click on: Clocking » Remote Clocking

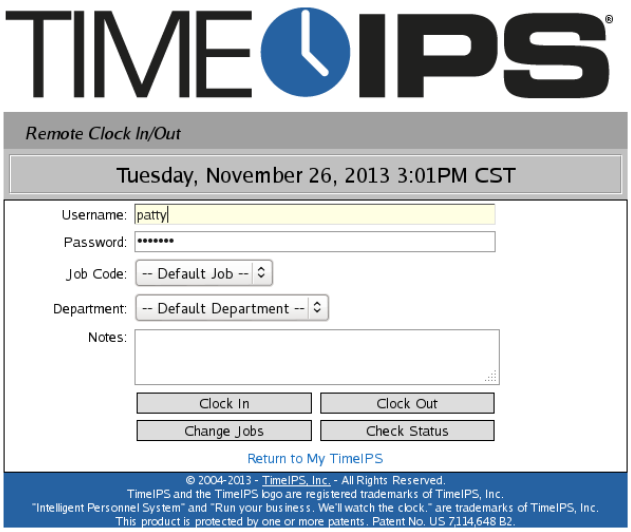


Click on the **Clock Setup** icon at the top of the page.



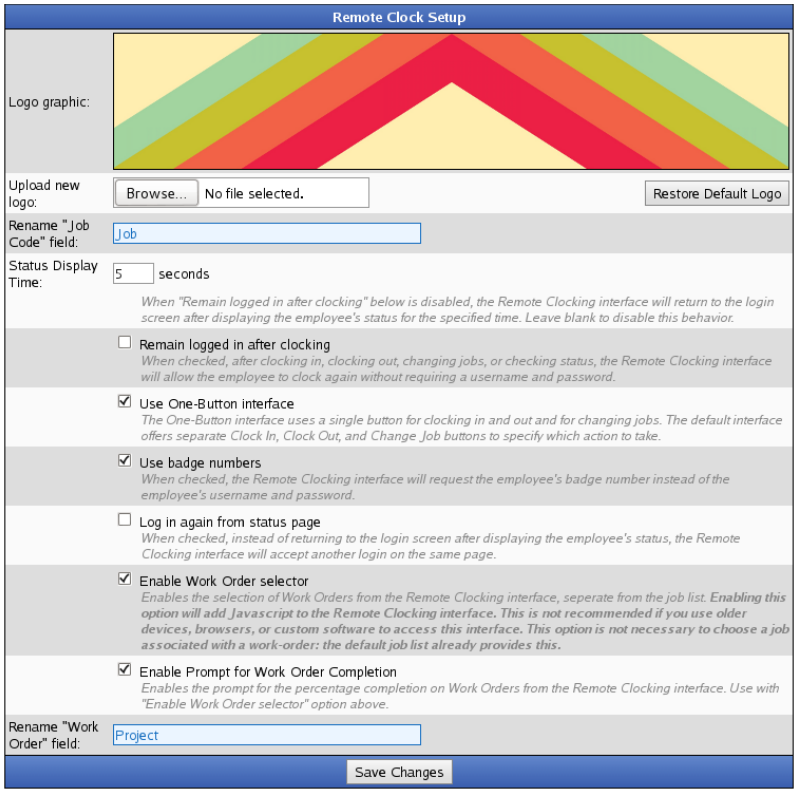
View Remote Clock

To view the current Remote Clock display, use the left pane Main Menu » My TimeIPS, click on: Remote Clocking



Remote Clock Setup

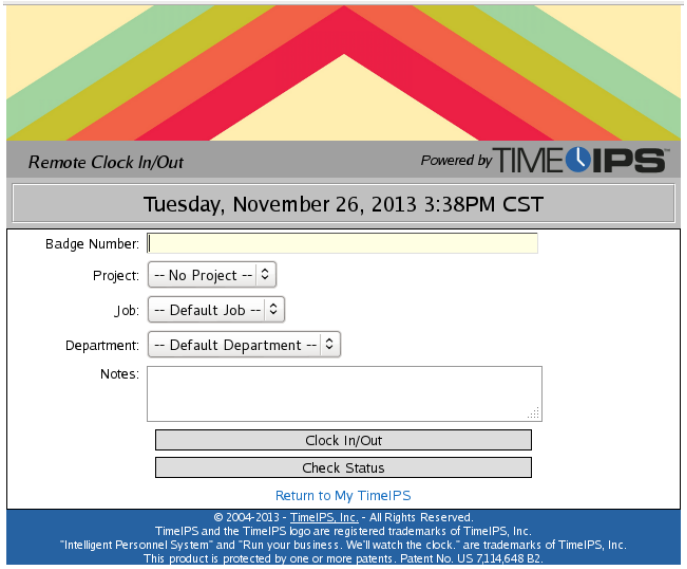
Back on the Remote Clocking Clock Setup page, make the changes you would like to see in the Remote Clock display.



- You can choose to leave the Logo Graphic as is, **Upload a New Logo** or **Restore the Default Logo.**
  - To **Upload a New Logo**, click the Browse button, then navigate to and select the new logo.

NOTE: The new graphic will not display on this page until the " Save Changes" button is clicked.

- If you would like to **Rename the "Job Code" field**, type it into the box.
- **Status Display Time**: When "Remain logged in after clocking" below is disabled, the Remote Clocking interface will return to the login screen after displaying the employee's status for the specified time. Leave blank to disable this behavior.
- **Remain logged in after clocking**: When checked, after clocking in, clocking out, changing jobs, or checking status, the Remote Clocking interface will allow the employee to clock again without requiring a username and password.
- The **One-Button interface** uses a single button for clocking in and out and for changing jobs. The default interface offers separate Clock In, Clock Out, and Change Job buttons to specify which action to take.
- When checked, the Remote Clocking interface will request the employee's **Badge Number** instead of the employee's username and password.
- When the **Log in again from status page** box is checked, instead of returning to the login screen after displaying the employee's status, the Remote Clocking interface will accept another login on the same page.
- When the **Enable Work Order selector** box is checked, the selection of Work Orders is available on the Remote Clocking interface, seperate from the job list. Enabling this option will add Javascript to the Remote Clocking interface. This is not recommended if you use older devices, browsers, or custom software to access this interface. This option is not necessary to choose a job associated with a work-order: the default job list already provides this.
- Checking the **Enable Prompt for Work Order Completion** box, enables the prompt for the percentage completion on Work Orders from the Remote Clocking interface. Use with "Enable Work Order selector" option above.
- If you would like to **Rename the "Work Order" field**, type it into the box.
- To implement the changes, click the **Save Changes** button.



Remote Clock IP Whitelist

Remote Clocking Whitelists

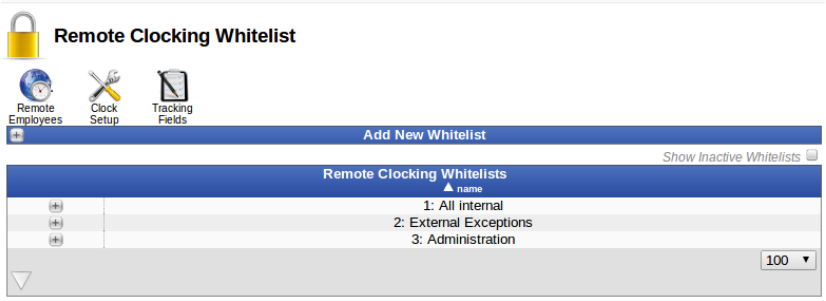
Using the left pane Main Menu, click on: Clocking ->Remote Clocking -> IP Address Whitelist
Permissions required: edit remote clock setup

Remote Clocking Whitelists allow you to restrict access to the remote clocking page through various factors. Primarily whitelists are used to restrict access to only clock attempts coming from particular IP addresses but they can also be further configured on several additional factors including employee information and time of day.

Note: An employee attempting to use remote clocking only needs to satisfy one whitelist to be allowed access.

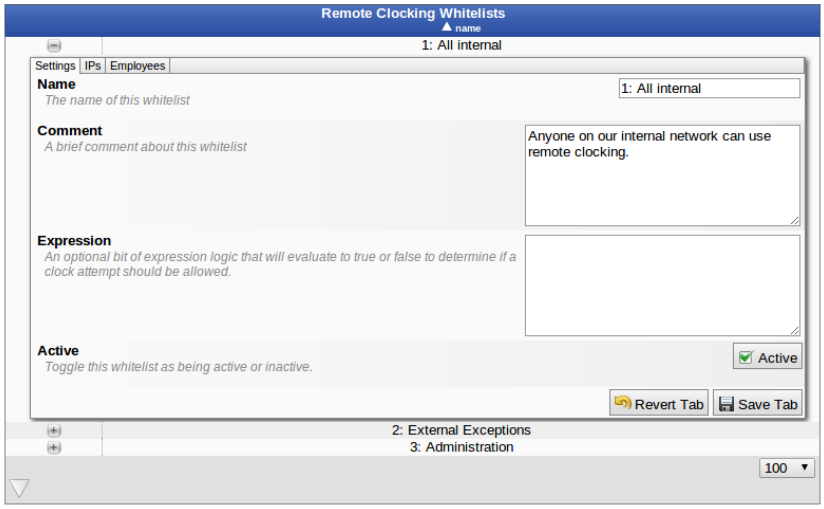
Note: If there are no whitelists within a division then the system will make no restrictions on remote clocking. This is effectively the same as whitelisting everything.

For this article we will discuss three different whitelists: internal connections, external connections, and administration employees.

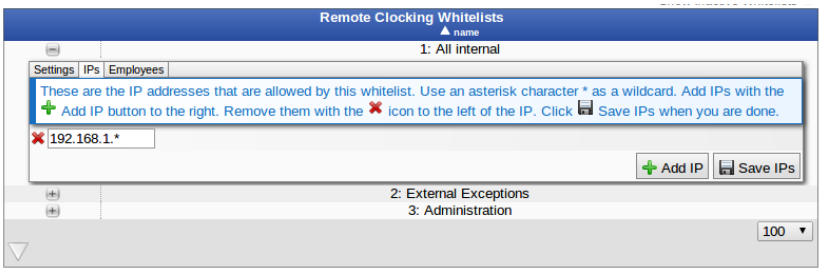


First we will review the settings for whitelist 1 and provide a description of the available options and an explanation of how this list is configured. When you expand the row for whitelist 1 you will be presented with three tabs: Settings, IPs, and Employees.

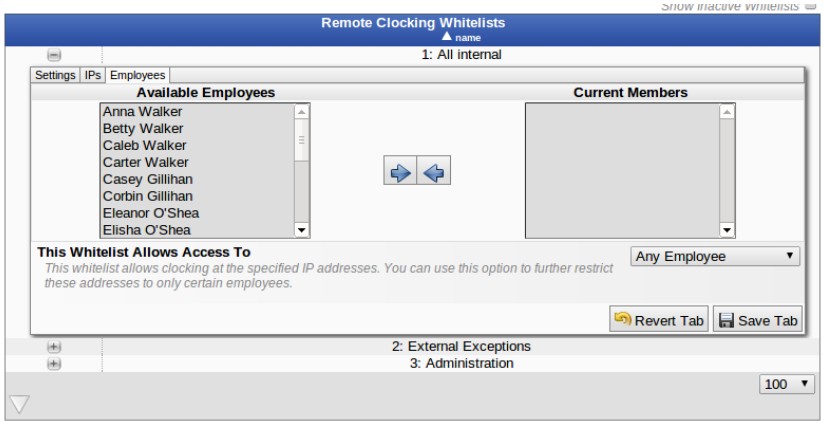
The first whitelist is intended to allow any employee to use remote clocking provided they are using a computer on the internal network.



- Name: A field used to identify this whitelist compared to other whitelists. This must be unique within a division.
- Comment: An optional field that can be used to provide an explanation of how the whitelist is configured or what it is supposed to do.
- Expression: An advanced optional field that lets you apply custom logic to the evaluation of this whitelist. This will be explained more in depth at the end of this article.
- Active: An option to toggle this whitelist as being active or inactive. Only active lists have any affect on remote clocking.

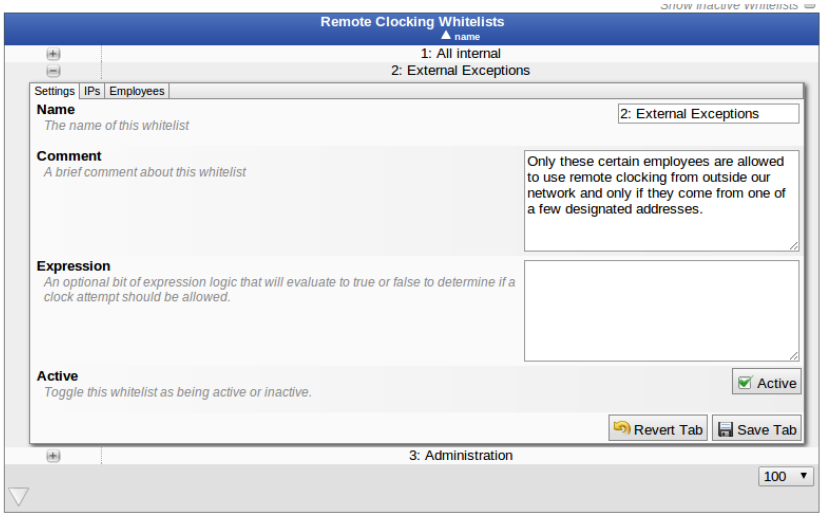


- Only one IP address is listed for this whitelist. It uses the wildcard * to match any address from that point forward. Alternatively we could explicitly whitelist internal addresses such as 192.168.1.101, 192.168.1.102, 192.168.1.103 etc. Using a wildcard opens this whitelist effectively to any address that starts with "192.168.1."

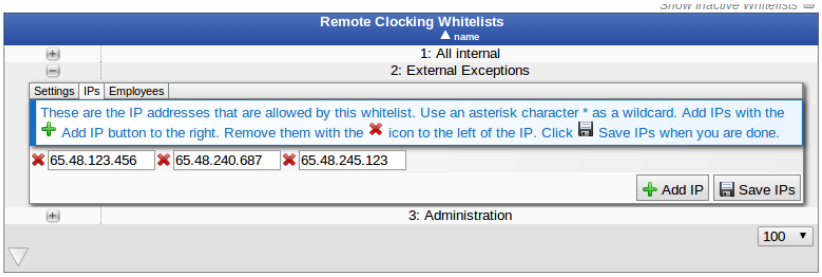


- This is the employee membership list for this whitelist. There are no employees currently listed as members but that doesn't matter because for the second option we are saying that this whitelist is not restricted to certain employees.

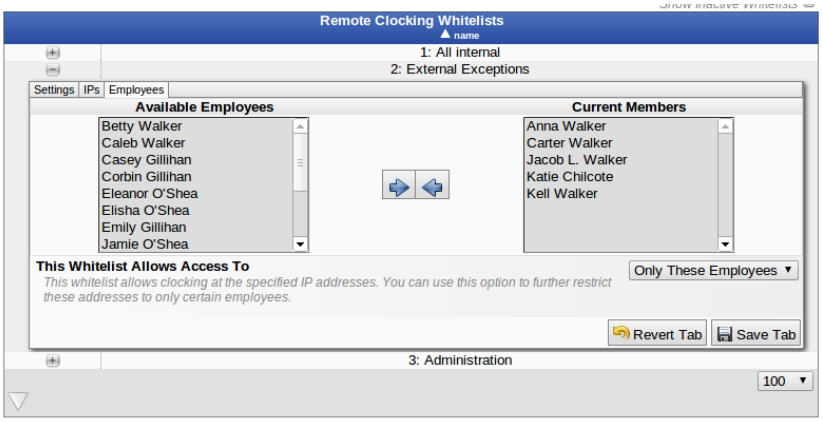
The second whitelist allows remote clocking to be used from outside the local network but only if the employee is coming from a particular IP address or if they are on a restricted list of employees.



- The settings on this tab for this whitelist are not significantly different from the first whitelist. We have a different name and comment to identify and explain this whitelist.

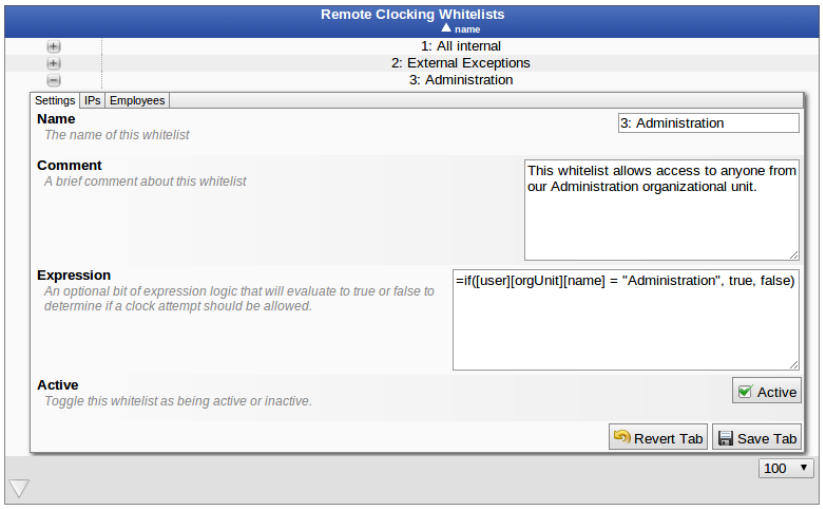


- Unlike the first whitelist which used a wildcard to match all internal addresses, this whitelist only allows access coming from three specific addresses.



- Here we have defined a group of five employees and specified that only these employees will be whitelisted.

The last whitelist is configured to allow access to any employee from the Administration Organizational Unit regardless of the IP they are using. By tying the rule to the employee's organizational unit we do not have to maintain a list of employees within the whitelist itself.



- For this example on the employee tab we are allowing access to all employees and on the IPs tab we are allowing all IPs by adding a single IP to the list which is just the wildcard character *.
- This whitelist utilizes the power of expressions. When an employee's remote clock attempt is evaluated we will evaluate the expression to either a true (1) or false (0) value. If the expression returns true then the employee is whitelisted. In this example we compare the name of the employee's organizational unit to the static string "Administration". If they match we return true, otherwise we return false.
  - A more detailed explanation of expressions in remote clocking can be found at this article

---

Remote Clocking Whitelist Expressions

This article explains the purpose of expressions in remote clocking whitelists and provides the available configuration options.

Remote Clocking Whitelists

Whitelists are used to grant employees access to the remote clocking interface. Whitelists can restrict access based on the IP address of the employee and can be further limited to a defined set of employees. Additionally whitelists can be further restricted using custom logic through the use of an expression. For a full explanation of whitelists and their interface view this article.

Purpose of Expressions

Expressions allow you to tailor the restriction of whitelists based on whatever criteria you need to match your company policy. Examples include only allowing access at certain times of day or to employees from a certain group (payroll type, schedule group, organizational unit etc) or any other conditional rule.

Format of Expressions

Expressions must start with an equals sign '='. They provide a single line of code that is evaluated and reduced down to either TRUE or FALSE. If the expression evaluates to TRUE then it is valid and the whitelist applies to the employee's clock attempt. If it is FALSE then the whitelist will not grant access to the employee.

Supported Functions

Remote clocking whitelist expressions utilize the same expression parser as Custom Reports. As such the same functions are avaiable. The list of functions is available at this article.

Available Variables

The following information is available. Variable names are case sensitive.

Variable Outline	Full Variable Name	Description
time	[time]	This is the Unix Timestamp of the clock attempt. Convert this with the utcdate function.
ip	[ip]	This is the IP address of the clock attempt.
user	[user]	This variables itself has no value to expressions. It serves as the starting point for multi-dimensional variables that contain more information about this employee.
usersID	[user][usersID]	This is the unique database ID assigned to this employee by TimeIPS. This will always be unique among all employees in the system.
nameFirst	[user][nameFirst]	The employee's first name
nameLast	[user][nameLast]	The employee's last name
nameMid	[user][nameMid]	The employee's middle name if provided.
namePref	[user][namePref]	The employee's preferred name if provided
HID	[user][HID]	The employee's badge number
type	[user][type]	Starting point for information about the employee's payroll type.
typeID	[user][type][typeID]	A unique database ID assigned to this payroll type.
name	[user][type][name]	The name of the employee's payroll type.
timing_frame	[user][type][timing_frame]	An indicator about the payroll frequency of this payroll type. Possible values are 'week', 'biweek', 'month', 'bimonth', and '4-4-5'
code	[user][type][code]	An arbitrary payroll code associated with this payroll type.
orgUnit	[user][orgUnit]	Starting point for the employee's organizational unit
organizationalUnitID	[user][orgUnit][organizationalUnitID]	A unique database ID for this unit

name	[user][orgUnit][name]	The name of this unit
code	[user][orgUnit][code]	An arbitrary code associated with this unit
scheduleGroup	[user][scheduleGroup]	Starting point for this employee's schedule group
schedGroupID	[user][scheduleGroup][schedGroupID]	Unique database ID.
name	[user][scheduleGroup][name]	The name of this schedule group
defaultDepartment	[user][defaultDepartment]	Starting point for information about this employee's default department
departmentID	[user][defaultDepartment][departmentID]	A unique database ID
name	[user][defaultDepartment][name]	The name of this employee's default department
shortName	[user][defaultDepartment][shortName]	The abbreviated name of this department
ctrlNum	[user][defaultDepartment][ctrlNum]	An arbirtrary control number for this department
code	[user][defaultDepartment][code]	The code for this department. This is the code employees might type at the clock
subCode	[user][defaultDepartment][subCode]	An optional subcode for this department
glNum	[user][defaultDepartment][glNum]	An optional G.L. Number for this department.
altNum	[user][defaultDepartment][altNum]	An optional alternate number used by this department
trackTime	[user][defaultDepartment][trackTime]	Either a 1 or 0 if this department is tracked against worked time
trackBenefits	[user][defaultDepartment][trackBenefits]	Either a 1 or 0 if this department is tracked against benefits
trackHolidays	[user][defaultDepartment][trackHolidays]	Either a 1 or 0 if this department is tracked against holidays
trackPiecework	[user][defaultDepartment][trackPiecework]	Either a 1 or 0 if this department is tracked against piecework
defaultWorkOrder	[user][defaultWorkOrder]	Starting point for information about the employee's default work order
workOrderID	[user][defaultworkOrder][workOrderID]	A unique database ID about this work order
name	[user][defaultworkOrder][name]	The name of this work order
lcdName	[user][defaultworkOrder][lcdName]	The abbreviated name of this work order
code	[user][defaultworkOrder][code]	The code to identify the work order
poNum	[user][defaultworkOrder][poNum]	A P.O. number associated with the work order
dateStart	[user][defaultworkOrder][dateStart]	The date work on this work order is intended to begin
dateDue	[user][defaultworkOrder][dateDue]	The due date of this work order
note	[user][defaultworkOrder][note]	A note associated with this work order
customer	[user][defaultworkOrder][customer]	A starting point for information about the customer on this work order
custID	[user][defaultworkOrder][customer][custID]	This customer's unique database ID
name	[user][defaultworkOrder][customer][name]	The name of this customer
addr1	[user][defaultworkOrder][customer][addr1]	The first line in this customer's address
addr2	[user][defaultworkOrder][customer][addr2]	The second line in this customer's address
city	[user][defaultworkOrder][customer][city]	The city for this customer's address
state	[user][defaultworkOrder][customer][state]	The state for this customer's address
zip	[user][defaultworkOrder][customer][zip]	The zip code for this customer's address
phone	[user][defaultworkOrder][customer][phone]	The phone number on this customer
fax	[user][defaultworkOrder][customer][fax]	The fax number on this customer
defaultJob	[user][defaultJob]	Starting point for information about this customer's default job
jobID	[user][defaultJob][jobID]	The unique database ID associated witht his job
lcdName	[user][defaultJob][lcdName]	The shortened name of this job
code	[user][defaultJob][code]	The job code used to clock in to this job
name	[user][defaultJob][name]	The name of the job
ctrlNum	[user][defaultJob][ctrlNum]	A control number associated with the job
billingRate	[user][defaultJob][billingRate]	A billing rate associated with the job
glNum	[user][defaultJob][glNum]	A G.L. number for the job
description	[user][defaultJob][description]	Any description provided about the job
subCode	[user][defaultJob][subCode]	An arbitrary sub code identifier for the job

altNum	[user][defaultJob][altNum]	The job's alternate number
customer	[user][defaultworkOrder][customer]	A starting point for information about the customer on this work order
custID	[user][defaultworkOrder][customer][custID]	This customer's unique database ID
name	[user][defaultworkOrder][customer][name]	The name of this customer
addr1	[user][defaultworkOrder][customer][addr1]	The first line in this customer's address
addr2	[user][defaultworkOrder][customer][addr2]	The second line in this customer's address
city	[user][defaultworkOrder][customer][city]	The city for this customer's address
state	[user][defaultworkOrder][customer][state]	The state for this customer's address
zip	[user][defaultworkOrder][customer][zip]	The zip code for this customer's address
phone	[user][defaultworkOrder][customer][phone]	The phone number on this customer
fax	[user][defaultworkOrder][customer][fax]	The fax number on this customer
category	[user][defaultJob][category]	Starting point for information about this job's category
catID	[user][defaultJob][category][catID]	A unique database ID for this category
name	[user][defaultJob][category][name]	The name of the category
descr	[user][defaultJob][category][descr]	A description about this job category
code	[user][defaultJob][category][code]	A code associated with this job category
manager	[user][manager] *?	This is the employee's manager. There is another complete set of variables for the manager starting where this list startes with 'user'. For example to get this employee's manager's name you could use [user][manager][nameFirst] If the manager has a manager above them then they will also have a manager entry at [user][manager][manager] and so on.

Examples

Only allow clocks for employees who have a manager named "Bob"

```
=if([user][manager][nameFirst] = "Bob", true, false)
```

Prevent anyone in the production schedule group from using this whitelist

```
=if([user][scheduleGroup][name] = "Production", false, true)
```

Only let office workers clock if it is after 8 am

```
=if([user][orgUnit][name] = "Office Staff" && utcdate( "G", [time], [user][usersID] ) < 8, false, true)
```

Internal Information (visible to Administrators only):

Note: There are several additional variables available (basically anything that's in the database).

See Also:
Remote Clocking Whitelists
Supported Functions For Advanced Expressions
QuickBooks Pay Item Expressions
Schedule Groups Break Rules Expression Variables

TimeIPS Telephone Clocking Manager's Menu Options

Managers can remotely clock in/out, check status of employees, and record messages for employees using the TimeIPS Telephone Clocking system. Following is a summary of the Manager's Menu options available when calling the Telephone Clocking system.

Manager's Menu - Option 7 from Main Menu

1 - Check Status of an Employee

"Enter Employee's ID followed by # sign" or * to cancel."
{Employee's Status Play}

2 - Check Status of Your Employees

{Employee's Status Play}
1 - Previous Employee
2 - Next Employee
3 - Play Status
9 - Exit

3 - Review or Change a Message for an Employee

"Enter Employee's ID followed by # sign or * to Cancel."
{Employee's Name and message plays}

1 - Review Messages

{Message(s) for Employee Plays}
1 - Play the Previous Message/Backward
2 - Play the Next Message/Forward
3 - Delete the Message
4 - Set the Message Start Date

- Remove Start Date Requirement
Enter start Date in format YYYYMMDD

5 - Set the Message End Date

- Remove End Date Requirement
Enter start Date in format YYYYMMDD

6 - Set the Number of Times to Play

- Remove the Times to Play Limit
Enter the Number of Times to Play Limit

7 - Replay the Message
9 - Exit

2 - Record a New message

{Record after the beep or * to cancel}
1 - Save
{Saved Message Plays}
2 - Record message
3 - Delete the Message
4 - Set the Message Start Date

- Remove Start Date Requirement
Enter start Date in format YYYYMMDD

5 - Set the Message End Date

- Remove End Date Requirement
Enter start Date in format YYYYMMDD

6 - Set the Number of Times to Play

- Remove the Times to Play Limit
Enter the Number of Times to Play Limit

7 - Replay the Message
9 - Exit

9 - Exit

4 - Review or Change a Message for All Employees

{Message(s) for All Employees Plays}
1 - Review Message
2 - Record a New message

{Record after the beep or * to cancel}
{Recording Plays}
1 - Save
{Saved Message Plays}
2 - Re-record
3 - Delete the Message
4 - Set the Message Start Date

- Remove Start Date Requirement
Enter start Date in format YYYYMMDD

5 - Set the Message End Date

- Remove End Date Requirement
Enter start Date in format YYYYMMDD

6 - Set the Number of Times to Played

- Remove the Times to Play Limit
Enter the Number of Times to Play Limit

7 - Replay the Message
9 - Exit

9 - Exit

5 - Reset an Employee's PIN Number

"Enter Employee's ID followed by # sign."
{Employee's Name is played}

1 - Confirm Employee

{PIN Number is Reset; Employee will be Prompted to Setup a New PIN on next VOIP call}

9 - Exit

6 - Clock all managed employees in

Automatic time adjustments and employee schedule restrictions will be applied.

7 - Clock all managed employees out

Automatic time adjustments and employee schedule restrictions will be applied.

9 - Exit

See Also:
TimeIPS Telephone Clocking System
Useing Telephone Clocking on the same line as a Fax Machine
TimeIPS Telephone Clocking Manager's Menu Options

TimeIPS Telephone Clocking Menu Options

Employees can remotely clock in/out, check status, listen to messages, and record a clock note using the TimeIPS Telephone Clocking system. Following is a summary of the menu options available when calling the Telephone Clocking system.

Dial TimeIPS Telephone Clocking Phone Number

If the system has been set to prompt the caller to choose a language, it will do so now. (See the Telephone Clocking article's Language tab section for set up instructions.)

If the caller's phone number is "Call Blacklisted", a message to that affect will play then the call will be disconnected.

{System Greeting Plays}

If the caller's phone number is on the "Clock In/Out blacklist" or not on the "Clock In/Out whitelist", a message to that affect will be heard. The caller will have the option to listen to messages. If the caller is a manager or administrator, additional administrative menu options will be available.

Enter a Badge Number then #.

If a PIN number is required, the caller will be prompted to enter their PIN number now. If the PIN is not set or if PIN Re-registration is required, the caller will be prompted to setup a PIN number then state their first and last name.

"You have [#] messages"
{Employee Status Plays}

1 - Clock In *(if Clock In/Out is not restricted)*

If you have set up the alternate "Prompt 1 For In/Out" mode, then this option 1 will be used to smart clock for both In and Out.
If your system is configured to use jobs, you will be prompted to enter a job code, followed by #.
If you are using work orders, you may enter the work order code, press the * key, and then enter the job code and #.
To clock into your default job, simply press # without entering a code.

2 - Clock Out *(if Clock In/Out is not restricted)*

If you have set up the alternate "Prompt 1 For In/Out" mode, then this option 2 will be disabled. (See the Telephone Clocking article's Prompt Informatoin section for instructions.)

3 - Change Jobs*(if Clock In/Out is not restricted and your system is configured to use jobs)*

You will be prompted to enter a job code, followed by #.
If you are using work orders, you may enter the work order code, press the * key, and then enter the job code and #.
To change to your default job, simply press # without entering a code.

1 - Record a Clock Note *(If just clocked in or out)*

Record after the beep or * to cancel}
1 - Save
2 - Re-record
3 - Delete
7 - Play Message
9 - Exit

4 - Play status
5 - Play messages *(If there are unheard messages)*

{Message Plays}
1 - Previous/Backward
2 - Next/Forward
7 - Repeat
9 - Exit

6 - Change PIN number *(If PIN number is required)*
7 - Manager's Menu *(If Manager)*

1 - Check Status of an Employee
2 - Check Status of Your Employees
3 - Review or Change a Message for an Employee

1 - Review Messages
2 - Record a New message
9 - Exit

4 - Review or Change a Message for All Employees

1 - Review Message
2 - Record a New message
9 - Exit

5 - Reset an Employee's PIN Number
6 - Clock all your employees In
7 - Clock all your employees Out
9 - Exit

8 - Administrator's Menu *(Requires* "Telephone Clock Administrator Menu" permission)

1 - Record System Greeting

{Record after the beep or * to Cancel}
{Recorded Message Plays}
1 - Play
2 - Re-record
9 - Exit

2 - Use Default System Greeting
3 - Review or Change a Message for All Employees

1 - Play
2 - Re-record
3 - Delete
9 - Exit

9 - Exit

9 - Exit

NOTE: If access is restricted by Caller ID, callers from unauthorized numbers will receive the message "TimeIPS is not accepting calls from your number" and the call will be disconnected.

NOTE: If clocking access is restricted by Caller ID, callers from unauthorized numbers will receive the message "Please note that the number your are calling from is not authorized for clocking in or out. If you need to clock from this number, please contact your manager for assistance." Options 1 and 2 will not be available to the caller.

See Also:
TimeIPS Telephone Clocking System
TimeIPS Telephone Clocking Menu Options

Relay Control

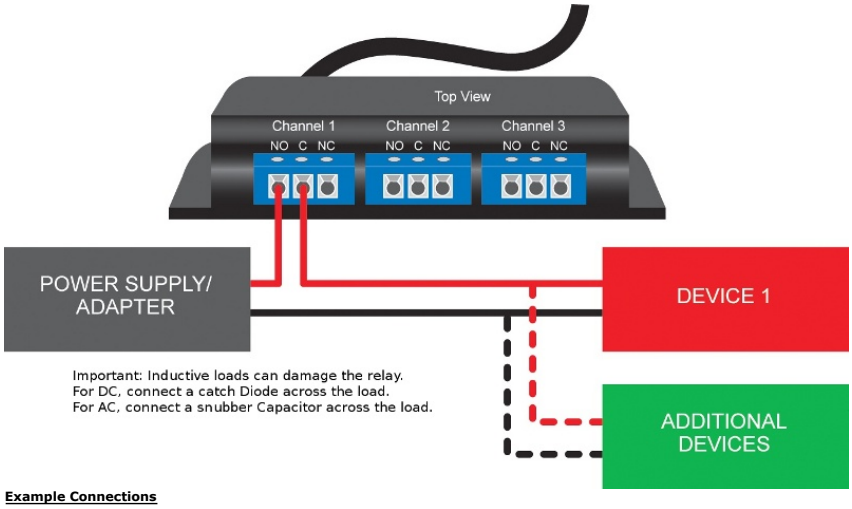
Note: The configuration and operation of the RLY-3CH-PS2 and RLY-3CH-USB are identical and are both referred to as a TimeIPS Relay Control System.

The TimeIPS Relay Control System is intended for the following applications:

- *Signaling the beginning and/or the end of a shift.*
- *Providing a warning prior to the beginning of a work period.*
- *Indicating the beginning and/or end of a break.*
- *Providing access control between work and non-work areas, such as a break room door.*
- *Signaling an employee's arrival/departure.*

The TimeIPS Relay Control system can also activate/deactivate other electronic devices that should be synchronized with a shift/break or employee arrival/departure. For example, TimeIPS Relay Control can be used to activate a security camera, light, fan, radio, etc.

TimeIPS Relay Control Device



Example Connections

Note: If you have a device that requires more that 5 amps you can use the TIPS relay controller to trigger a second relay that is properly rated for your implementation. For an example schematic for wiring something like this click here.

See Also:
Signaling the beginning/end of a shift Example
Providing Access Control between Two Areas Example
Example Devices for use with TimeIPS Relay Control Modules/Upgrades
Troubleshooting: Relay Does not Activate
Relay Control Snubber Installation

Relay Example: Signaling the beginning/end of a shift

This example explains how to install and setup the Relay Control device to signal the beginning and/or end of a work shift.

1. Plan your needed relay control actions.

   Our example shift is an 8:00 am - 5:00 pm shift with lunch from 12:00 pm - 1:00 pm. There is a morning break from 10:00 am - 10:15 am and an afternoon break from 3:00 pm - 3:15 pm. Our desired behavior is to signal our employees at the beginning and end of the shift, lunch, and both breaks.

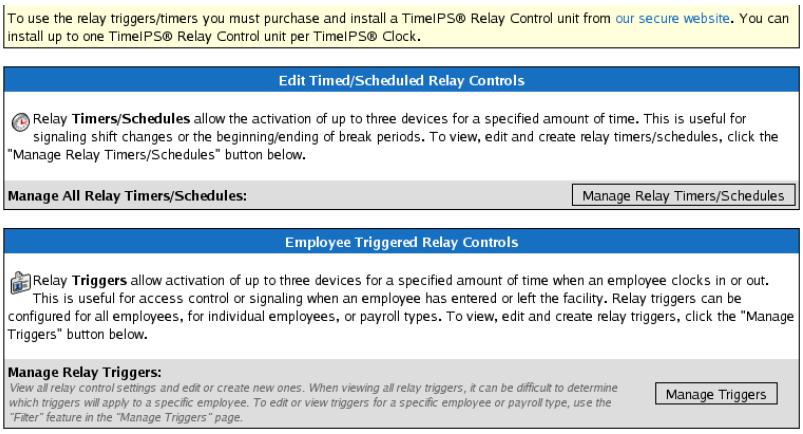
2. Choose your signaling device.

   In our example, a warehouse or indoor manufacturing environment, a 3 second signal on an electronic buzzer is ideal to indicate the start and end of the shift. A one second signal on the same device can then indicate the start and end of lunch and break times.

   NOTE: Consider your business's needs and environmental conditions when selecting the best device for you. See the Relay Control Example Devices article for a list of example devices.

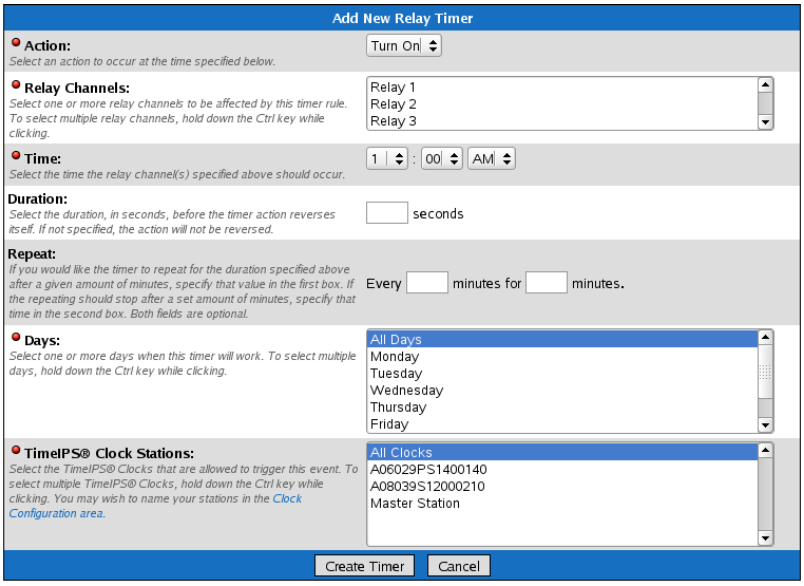
3. Setup a Timed/Scheduled Relay Control.

   Using the left pane main menu, click on Administration » Clocking » Relay Controls



The Relay Controls Screen

a. Click on the **Manage Relay Timers/Schedules** button.



Timed/Scheduled Relay Controls

b. Select/enter the options as indicated in the screen shot (above).

NOTE: Required fields are indicated by red bullets.

NOTE: Review the field level instructions on the screen.

---

c. Click on the **Create Timer** button to save the relay timer.

NOTE: Click on the Cancel button to leave the page without saving.

---

d. Repeat steps B and C to create additional Timed/Scheduled timers for the end of the shift and for each break.

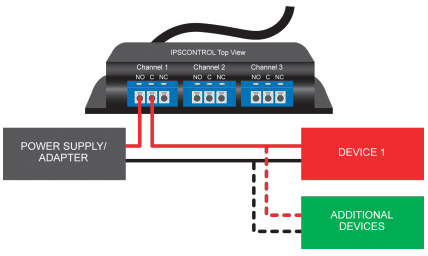
4. Install the signaling device and wiring to the TimeIPS Relay Control unit.

   a. Unscrew the two appropriate screws for the relay.

   - If the device should be off when TimeIPS is restarted or shut down, use the Normally Open, **NO**, and Common, **C**, wire screw terminals.
   - If the device should be on when TimeIPS is restarted or shut down, use the Common, **C**, and Normally Connected **NC**, wire screw terminals.

   b. Insert the device and power wires.

   c. Screw the leads securely.



In our example, the electronic buzzer should be off when TimeIPS is restarted or shut down. We therefore connect the power supply lead to the normally open, **NO**, wire screw terminal and the device lead to the common, **C**, wire screw terminal.

NOTE: If the device's power is disconnected or turned off, the device will revert to its fail safe or fail secure mode as manufactured.

The **Timed/Scheduled Relay Control** rules we set in step 3 will reverse the buzzers normally open circuit to a connected position for 3 seconds at 8:00 am and 5:00 pm and 1 second for each break.

TIP: You could connect additional devices, utilizing up to 5 Amperes, to the same circuits for control by Channel 1. You could also connect additional devices to Channels 2 and 3 and setup additional Relay Control rules for the corresponding Relays to control those devices separate from the Channel 1 device.

See Also:
Relay Control Device
Providing Access Control between 2 areas Example
Example Devices for use with TimeIPS Relay Control Modules/Upgrades
Troubleshooting: Relay Does not Sound Buzzer

Relay Example: Providing Access Control Between Two Areas

This example explains how to install and setup the Relay Control device to provide access control between a work and non-work area.

1. Plan your needed relay control actions.

   In this example, the company has a dual door entry with the TimeIPS LCD display and swipe badge reader located between the doors. Our desired behavior is to unlock the second door after the employee clocks in.

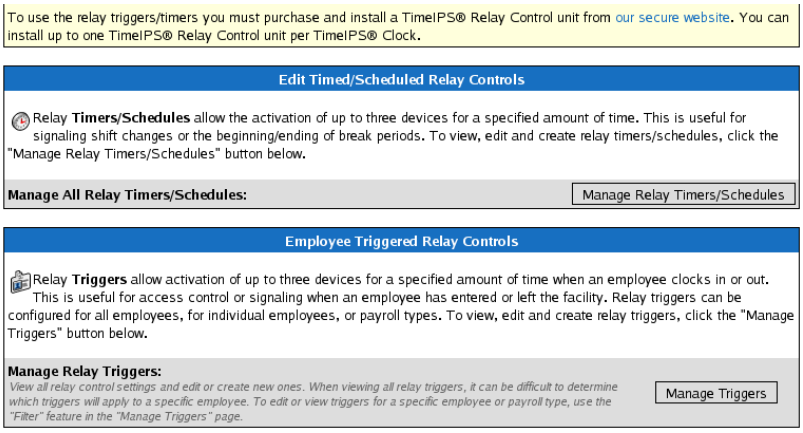
2. Choose your signaling device.

   In this example, an electronic door latch will release for 8 seconds after an employee clocks in or out.

   NOTE: Consider your business's needs and environmental conditions when selecting the best device for you. See the Relay Control Example Devices article for a list of example devices.

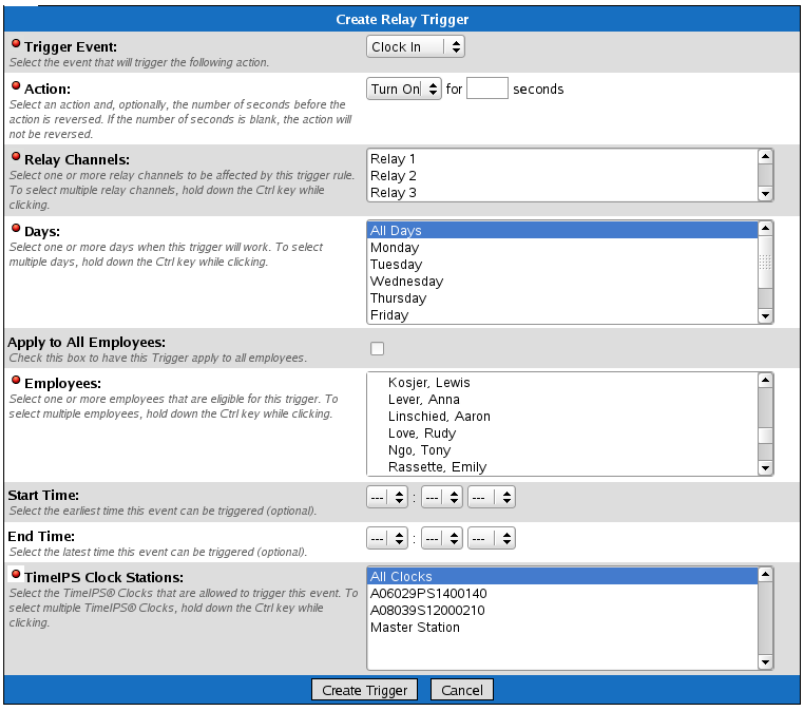
3. Setup an Employee Triggered Relay Control.

Using the left pane main menu, click on Administration » Clocking » Relay Controls



Relay Controls

a. Click on the **Manage Triggers** button.



Relay Trigger SetUp Screen

b. Select/enter the options as indicated in the screen shot (above).

NOTE: Required fields are indicated by red bullets.

NOTE: Review the field level instructions on the screen.

---

c. Click on the **Create Trigger** button to save the relay timer.

d. Repeat steps B and C to create an additional trigger for the Clock Out.

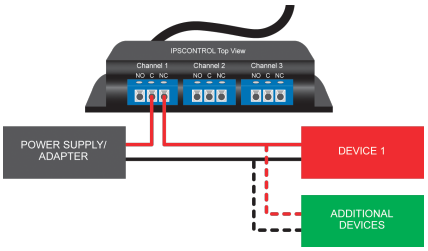
4. Install the signaling device and wiring to the TimeIPS Relay Control unit.

   a. Unscrew the two appropriate screws for the relay.

   - If the device should be off when TimeIPS is restarted or shut down, use the Normally Open, **NO**, and Common, **C**, wire screw terminals.
   - If the device should be on when TimeIPS is restarted or shut down, use the Common, **C**, and Normally Connected **NC**, wire screw terminals.

   b. Insert the device and power wires.

   c. Screw the leads securely.



In our example, the door latch should be on, or locked, when TimeIPS is restarted or shut down. We therefore connect the power supply lead to the common, **C**, wire screw terminal and the power supply to the normally connected, **NC**, wire screw terminal.

NOTE: If the device's power is disconnected or turned off, the device will revert to its fail safe or fail secure mode as manufactured.

The **Employee Triggered Relay Control** rules we set in step 3 will reverse the normally connected door latch circuit to open, or off, for 8 seconds when an employee clocks in or out.

See Also:
Relay Control Device
Signaling the beginning/end of a shift Example
Example Devices for use with TimeIPS Relay Control
Modules/Upgrades
Troubleshooting: Relay Does not Activate

Example Devices for use with TimeIPS Relay Control

The components and devices listed below are for example only and may not be available. Parts and/or vendors are not associated with or endorsed by TimeIPS, Inc. The selection and installation of non-TimeIPS components are not covered by TimeIPS support or warranty.

Power Supplies	Manufacturer	Part Number	Sample Vendors
12 Volt Power Adapter "AC/DC Power Supply Single- Output 12 Volt 1.5A 18W Carton"	Mean Well	GS18U12-P1J	www.jameco.com Catalog Part #: 1952855
12 Volt Power Adapter "AC/DC Power Supply Single- Output 12 Volt 2.08A 25W Carton"	Mean Well	GS25U12-P1J	www.jameco.com Catalog Part #: 380156

Wire	Manufacturer	Part Number	Sample Vendors
AWG 22 Wire "Belden Multi-Conductor Cables"	Belden	8442 060100R	www.jameco.com Catalog Part #: 732996

Buzzers/Alarms	Manufacturer	Part Number	Sample Vendors
Tone Generator, 12V Medium Volume (108db)	ValuePro	YC-321-1	www.jameco.com Catalog Part #: 148152
Siren, 12V Very Loud (125dB)	Velleman, Inc.	SV/PS5	www.jameco.com Catalog Part #: 2123733
Tone Generator, 12V Medium Volume (105db) "Piezo Siren"	ValuePro	SR15R3120LA	www.jameco.com Catalog Part #: 207993
Mechanical Buzzer 12V Low Volume (85db)	ValuePro	63S1120-LA	www.jameco.com Catalog Part #: 140695

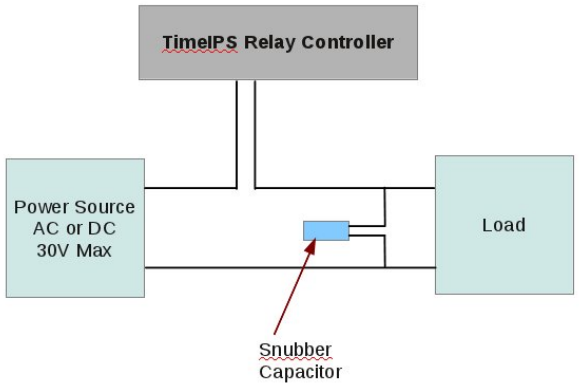
Door Locks	Manufacturer	Part Number	Sample Vendors
Electric Door Lock "Electric Door Strike for Metal Doors"	www.seco-larm.com	SD-994C	www.seco-larm.com Part: SD-994C
Electric Door Lock "Electromagnetic Lock"	Locknetics	320+	www.grainger.com Part #: 4GD81
Door Strike	Folger Alarms	202-US28	www.grainger.com 4RM51
Door Strike	Folger Alarms	204-US28	www.grainger.com 4RM48
Door Strike	Trine Access Technology	EN-400 Premium Electric Strike	http://www.trineonline.com

AC Controls	Manufacturer	Part Number	Sample Vendors
Power Sequencer	Furman Sound	MP-15	www.yoursoundsource.com/furman-mp-15.html

See Also:
Relay Control Device
Signaling the beginning/end of a shift Example
Providing Access Control between Two Areas Example
Modules/Upgrades

Relay Control Snubber Installation

The TimeIPS Relay Controller can operate intermittently and/or suffer permanent damage from inductive loads unless protected by a snubber capacitor. Examples of inductive loads include magnetic door locks, relays, motors and electromechanical bells/buzzers. To protect the contacts in your relay controller, please connect the snubber capacitor directly across the wires going to the load, as shown below. The Snubber capacitor can be used on any load, AC or DC, up to 30V. If you have a DC inductive load, you may also want to install a "catch diode" to further protect the relay controller.



Benefits

TimeIPS Benefits feature allows you to track sick and vacation time accrued and used.

The Payroll Integration with Benefits Tracking module (IPSQBI) is required.

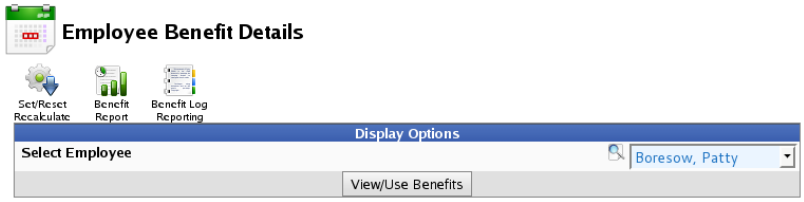
Included features:

- One accrual group
- Two tenure levels
- Vacation and Sick accrual types
- Automatic weekly accruals

With the optional Advanced Benefits Tracking module (IPSBEN), the following features are added:

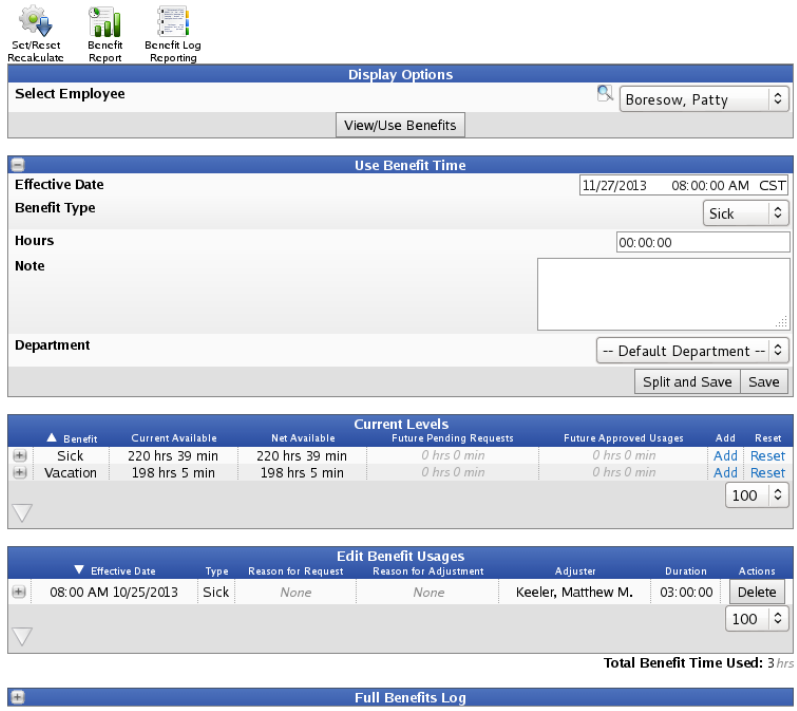
- Unlimited accrual groups
- Unlimited tenure levels
- Unlimited custom plus Vacation and Sick accrual types
- Flexible accrual periods
- Enhanced configuration options including caps and prorating

Using the left pane Main Menu » Administration, click on: Benefits » Employee Benefits



To display employee benefit and accrual information on the **Employee Benefit Details** screen,

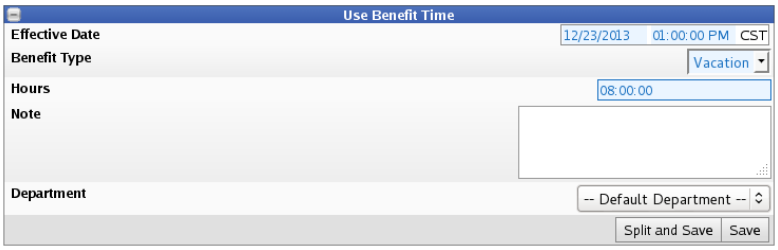
- **Select an Employee** from the drop down box.
- Click the **View/Use Benefits** button.



Once the screen is done loading, you will notice that **Display Options** is still viewable, and more information is now being displayed on your screen. These sections are:

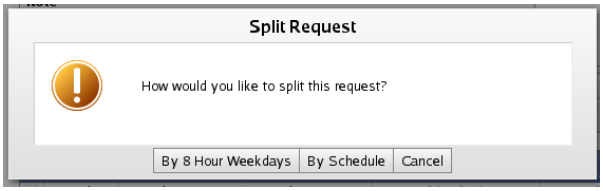
Use Benefit Time

- **Effective Date**: Input the date and time that the employee has requested off.
- **Benefit Type**: Select the type of benefit that is to be used by the employee.
- **Hours**: Input the amount of time that the employee has requested to expend.
- **Note**: An optional comment describing the reason for the request.
- Select the **Department** associtated with this benefit usage.

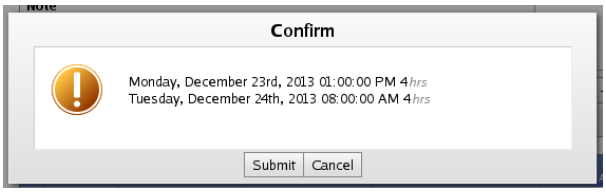


- Choose to either **Split and Save**, or just **Save**.

If you choose to Split, you can do so either by **Schedule** or **8 Hour Weekdays**.



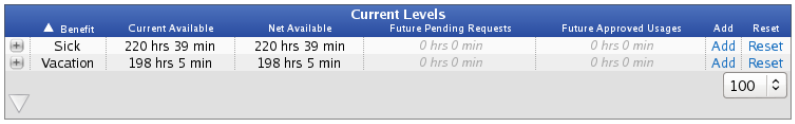
Make sure the Effective Date is set to when you want the benefit usage to start. The system will attempt to split it.



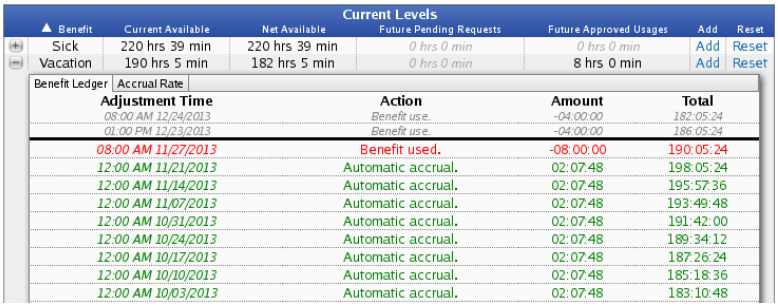
If the split is correct, click the **Submit** button. Otherwise, choose **Cancel** and enter two separate events.

Current Levels

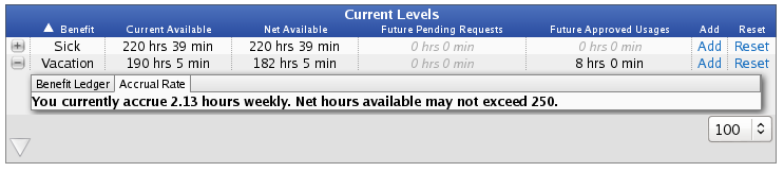
Current Levels allows you to view and add time in a particular benefit type.



- Click on the **+** (plus) sign next to the benefit type to view the benefit availability with a detailed listing for each accrual, usage, or reset.

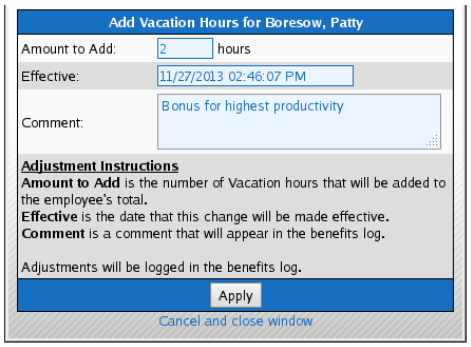


The **Benefit Ledger** tab shows the historical activity for each benefit type. Each event shows the **Time** the event took place, what **Action** was taken, the **Amount** of time effected, and the running **Total** of time remaining for that benefit type.



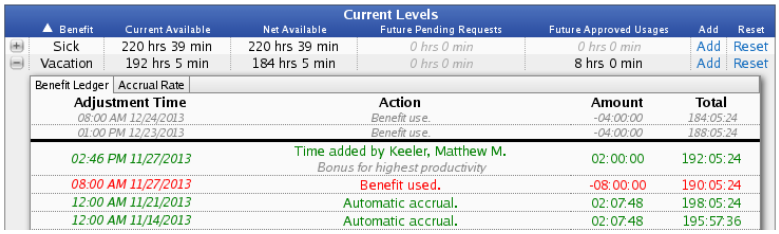
The **Accrual Rate** tab shows the amount of time and the frequency in which benefit time is accrued, as well as the maximum allowed amount of accrual time.

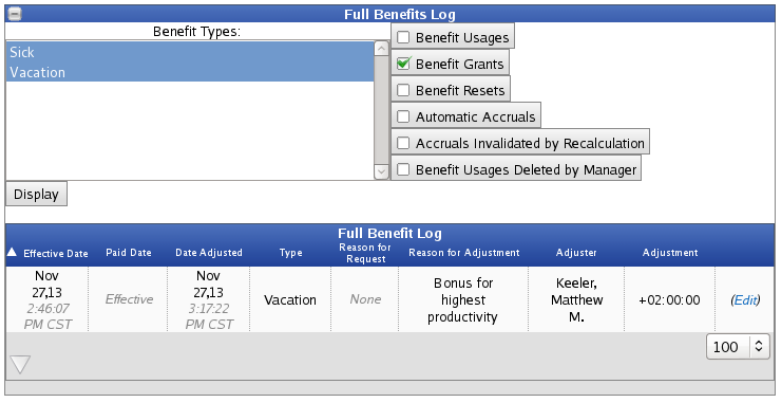
- To **Reset** the accrued time back to zero, click the **Reset** link to the far right of the Benefit type.
- To manually **Add** benefit time to an employees bucket, click the **Add** link to the far right of the Benefit type.



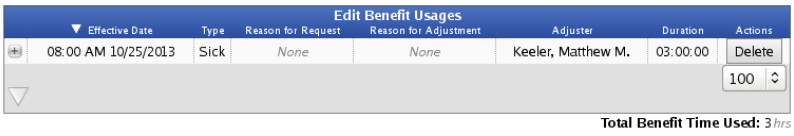
  - Enter the **Amount of Time** to be added in hours.
  - Enter the date/time this addition should be **Effective.**
  - Optionally, add a brief **Comment** explaining why the time is being added manually.
  - Click either the **Apply** button to add the time, or click the **Cancel and close window** link to cancel.

NOTE: Adjustments such as this appear on the Benefit Ledger and as a "Benefit Grant" on the Full Benefit Log.

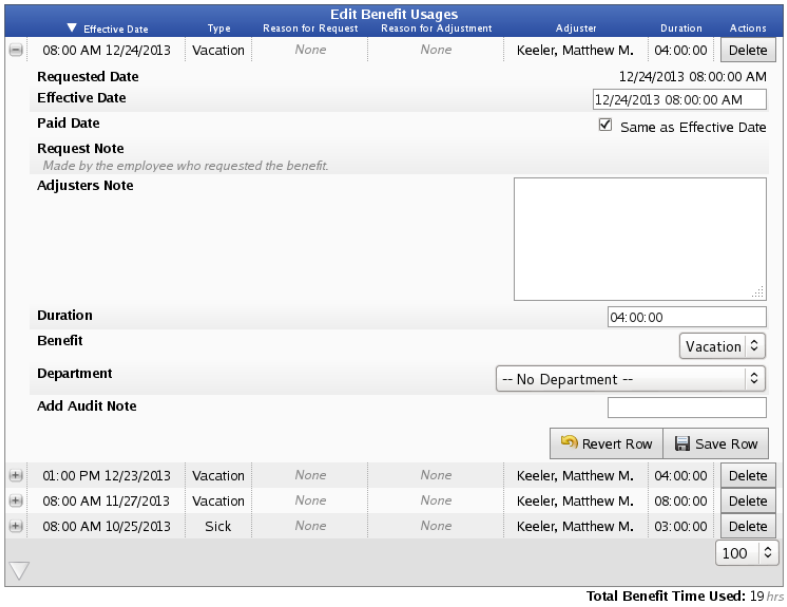




Edit Benefit Usage



- Click on the **+** (plus) sign next to the Effective Date to view and edit the the benefit usage details.



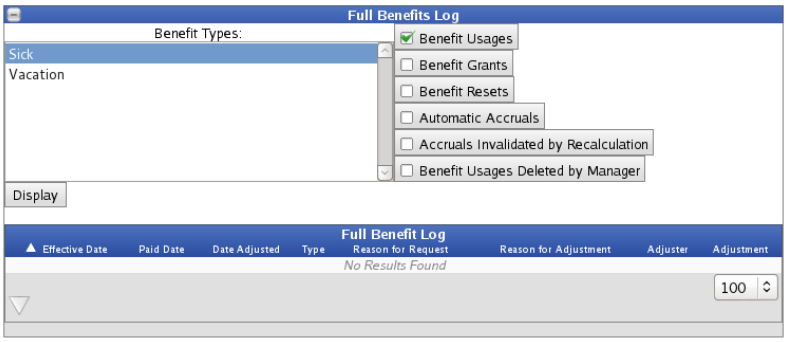
- **Requested Date**: Shows the date that the employee requested to use a benefit.
- **Effective Date**: The date that the benefit goes into effect.
- **Paid Date**: Placing a check next to "Same as Effective Date" tells the system that as soon as the benefit usage goes into effect, that the employee will be paid for that time.
- **Department**: You would use this, if you are tracking the benefit usage by department. If no departments are present then this option will not appear.
- **Request Note**: Display a note that is left by the employee.
- **Adjusters Note**: A text area that can be used to reply to employee about benefit usage.
- **Duration**: This is were you will set the length of time that has been approved for the employee.
- **Benefit**: In this drop down, you would select the type of benefit that the employee will be using.
- **Add Audit Note**: Allows you to add an additional note for auditing purposes.

- Click the **Save Row** button to save the changes.

Full Benefit Log

The Full Benefit Log is used to view an employee's history of benefit usage, grants, resets, accruals, and corrections.

- Click on the **+** (plus) sign to the far left of the **Full Benefits Log** bar.



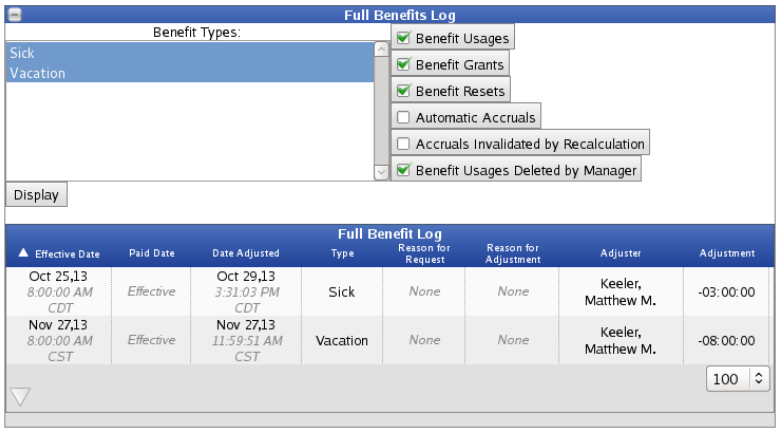
- Click on to highlight which **Benefit Type** you would like to view.

TIP: Hold down the Ctrl button while clicking, to highlight multiple types.

- On the right-hand side, check the box(es) next to the type of event you wish to view.

NOTE: Multiple boxes can be checked together and used to filter the log's entries.

- Click the **Display** button to view the entries.



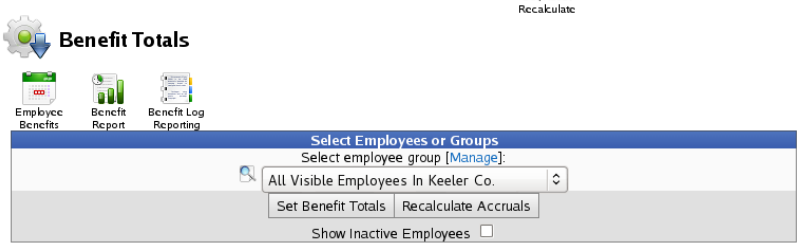
The following details are listed for each event.

- The **Effective Date** of usage, accrual, reset, or grant.
- The **Paid Date**, which will show "effective" if the "Same as Effective Date" was checked. TIP: The Paid Date can be changed under the Edit Benefits Usages session.
- The **Date** that it was **Adjusted**.
- The **Type** of benefit used.
- The **Reason** for the Requested usage, accrual, reset, or grant.
- The person that made the adjustments.
- The **Adjustment** or duration of the usage, accrual, reset, or grant.

SET : RESET : RECALCULATE

To Set, Reset, or Recalculate Benefits, click on the **Set/Reset Recalculate** icon

at the top of the page.



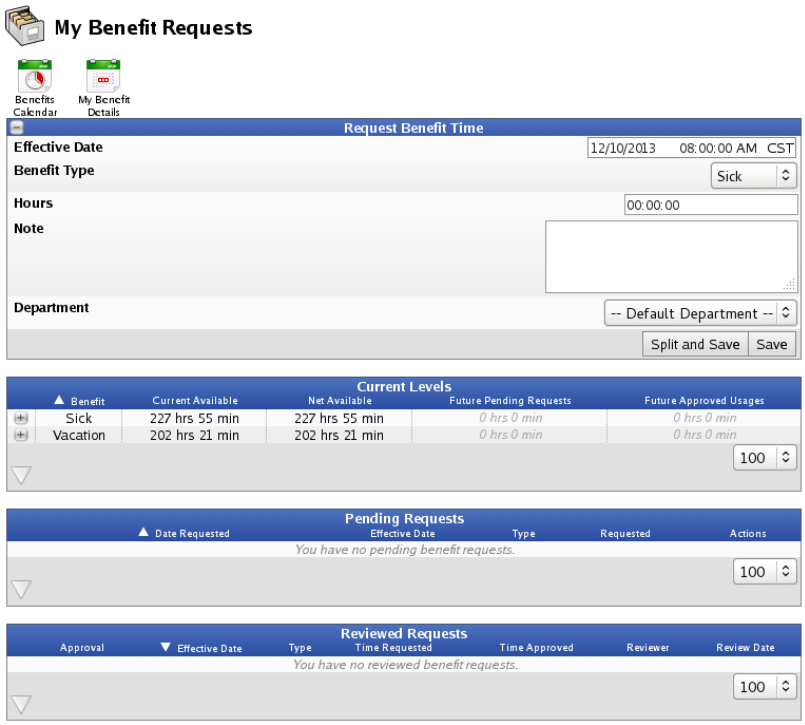
For more information, go to the **Set Reset Recalulate Benefits** article.

Benefits Request and Approval - Employee View

My Benefit Requests allows employees to view their benefits availability and request benefit time.

The Benefits Request and Approval module (IPSAPP) is required.

Using the left pane Main Menu » My TimeIPS, click on: My Benefit Request



From the **My Benefit Requests** screen, employees can Request Time off as well as see the Current Benefit Availability, Pending Requests, and Reviewed Requests.

Request Benefit Time

For instructions on how to **create a new Benefit Request**, see the **My Benefit Requests** article.

Pending Requests

After a Benefit Request is made, it appears in the **Pending Requests** section until it's approved. The manager or administrator assigned to you will be notified that there is a request waiting for their approval.

- Click on the **+** (plus) sign next to Date Requested to **expand the window**.
- If neccessary, **edit** the Request Note, Date, Amount of time, Benefit Type, and Department associated with this request.
- Click the **Delete** button to permanately remove the request.

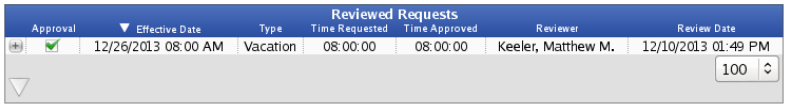
NOTE: The request can only be deleted while in the pending state.

- Click the **Save Row** button to implement the changes.

Reviewed Requests

After a Request has either been approved or disapproved, it appears in the **Reviewed Requests** section.

- A green **check mark** appears in the Approval box if the request has been **Approved**.



Reviewed Requests

Approval	Effective Date	Type	Time Requested	Time Approved	Reviewer	Review Date
✓	12/26/2013 08:00 AM	Vacation	08:00:00	08:00:00	Keeler, Matthew M.	12/10/2013 01:49 PM

100

- A red X appears in the Approval box if the request has been **Disapproved**.

Reviewed Requests

Approval	Effective Date	Type	Time Requested	Time Approved	Reviewer	Review Date
✗	12/26/2013 08:00 AM	Vacation	08:00:00	0	Keeler, Matthew M.	12/10/2013 02:00 PM

100

To View the Benefits Calendar

Click on the **Benefits Calendar** icon

at the top of the page.

Benefits Calendar

Display Options

Legend

Pending Approval | Approved | Holiday

December 01, 2013 – December 31, 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
01 December	02 December	03 December	04 December	05 December	06 December	07 December
08 December	09 December	10 December	11 December	12 December	13 December	14 December
15 December	16 December	17 December	18 December	19 December *4 Sick* *Lierz, Whitney*	20 December	21 December
22 December	23 December	24 December	25 December	26 December	27 December	28 December
29 December	30 December	31 December				

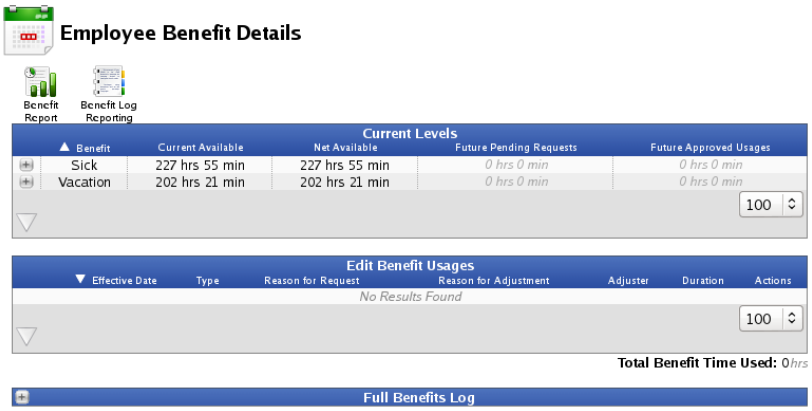
Display Options

- Click on the **+** (plus) sign on the far left side of the Display Options bar to expand the window.
- Customize the Date range, Name Format, how many Decimal Places appear in the Benefit Time, and the Employee or Group (visibility determined by permission level).
- Click the **Update Calendar** button to view the changes.

To View Benefit Details

Click on the **My Benefit Details** icon

at the top of the page. See the **Benefits** article for more informatoin.



Benefits Request and Approval - Manager View

Manager's are automatically notified when employees submit a Benefit Request. Benefit Approvals allows managers to view Pending Requests as well as approve or deny them.

Required Modules:

1. ***Benefits Request and Approval (IPSAPP)***
2. *And either* ***Payroll Integration with Benefits Tracking (IPSQBI)*** *or* ***Advanced Benefits Tracking (IPSBEN)***.

Using the left pane Main Menu » Administration, click on: Benefits » Benefit Approvals

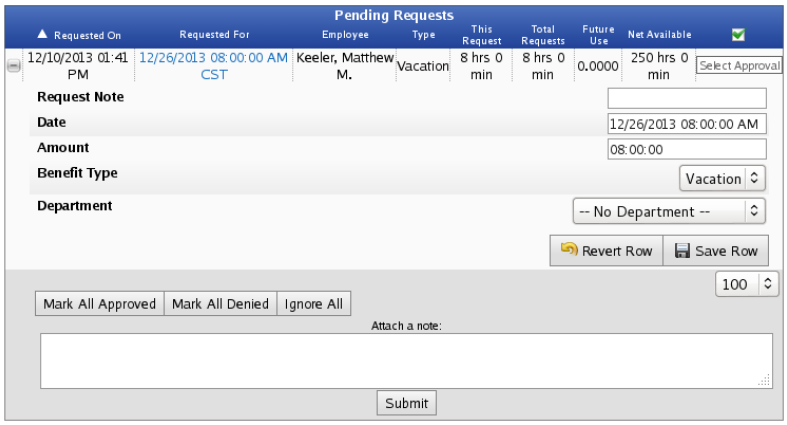
The **Benefit Approvals** page is broken up into three sections: Display Options, Pending Requests, and Reviewed Requests. In addition, there are links at the top of the page to Edit Options and view the Benefits Calendar.

Display Options

- **Select an Employee or Group** from the drop down box.
- Click the **Update Display** button to view their requests.

Pending Requests

The **Pending Requests** section lists all the benefit requests that are waiting for your approval or denial. Each request shows when it was requested, when it will be used, who it is for, what type of benefit (and subclass, if applicable), and how much time is requested. The additional information is provided to help approvers understand how their approval will affect the employees benefit hours. You also have the ability to edit the Pending Request details.



- If an **Edit** is made, be sure to click the **Save Row** Button to save the change.
- To Approve or Deny an individual request, click in the **Select Approval** box on the far right end of that request's row.
  - Clicking once on "Select Approval", will change it to **Approve**.
  - Clicking once on "Approve", will change it to **Disapprove**.
  - Clicking once on "Disapprove", will change it back to "Select Approval".
- To Approve, Deny, or Ignore all requests at once, click the appropriate button: **Mark All Approved**, **Mark All Denied**, or **Ignore All**.
- Click the **Submit** button to process the request.

NOTE: Once you have approved a benefits request, the request will show as approved to the employee in their **My Benefit Requests** section of **My TimeIPS®** and will automatically be deducted from that benefit type in the **Employee Benefits Report** under **Administration -> Benefits Report.**

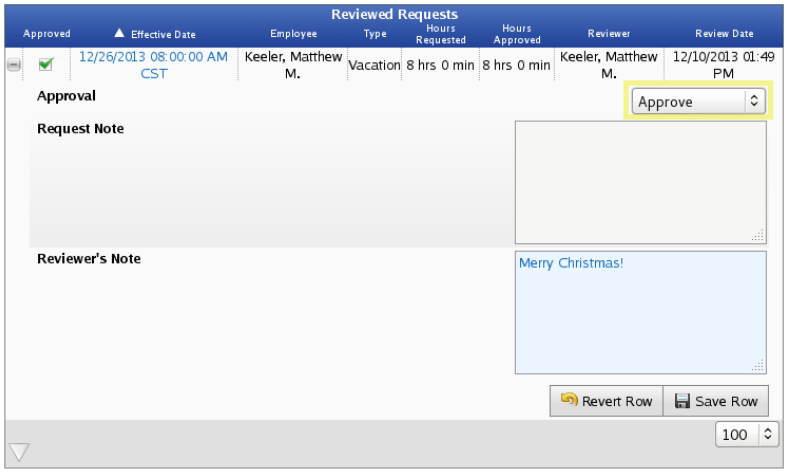
Reviewed Requests

The **Reviewed Requests** section lists all the benefit requests that have received approval or denial. Each request shows the approval status, when the benefit will be used, who it is for, what type of benefit it is (and subclass, if applicable), how much time is requested, how much time is approved, who reviewed it, and the date it was reviewed.

- A green **check mark** appears in the Approval box if the request has been **Approved**.

- A red **X** appears in the Approval box if the request has been **Disapproved**.

Requests listed in the Reviewed section, can still receive an approval change.



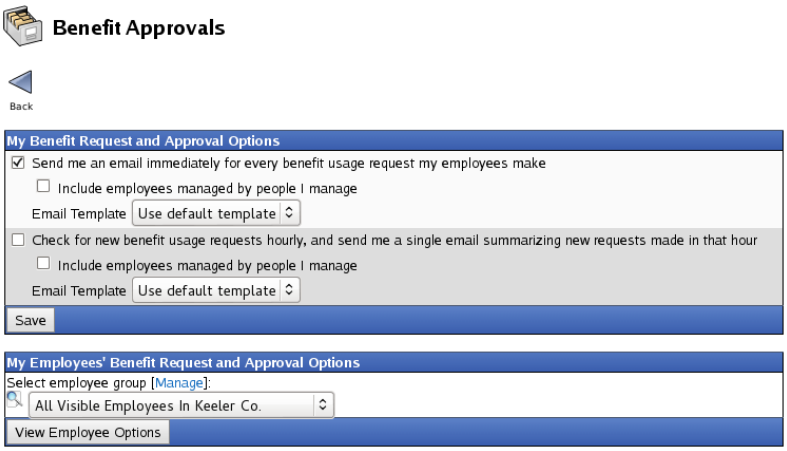
- On the right hand side, use the **Approval** drop down list to change the approval status of the request.
- A comment can be left in the **Reviewer's Note** box explaining the reason for the change.
- Be sure to click the **Save Row** button to save the changes.

NOTE: Benefits events may be edited up to the time that they are payrolled. After that time, they are permanent and any adjustment to the employee's benefits time will require a manual entry through the administration screens.

Email Notification Options

Initially, you will want to click on the **Edit Options** icon

at the top of the page, to set up your email notification options.



This will take you to the **My Benefit Request and Approval Options** screen where the following options are available:

- ***Send me an email immediately for every benefit usage request my employees make*** - This option will notify you of all of the new requests, deletions and edits for all of the employees that you directly manage at the instant they make the request.
- ***Include employees managed by people I manage*** - This option will notify you by email of every request, deletion and edit that every employee who falls under your hierarchy of management makes instantly when they make it.
- ***Check for new benefit usage requests hourly, and send me a single email summarizing new requests made in that hour*** - This option will send you an hourly email summarizing all new requests, edits and deletions for employees that you directly manage.
- ***Include employees managed by people I manage*** - This option will send you an hourly email summarizing all new requests, edits and deletions for all employees that fall under your hierarchy of management.

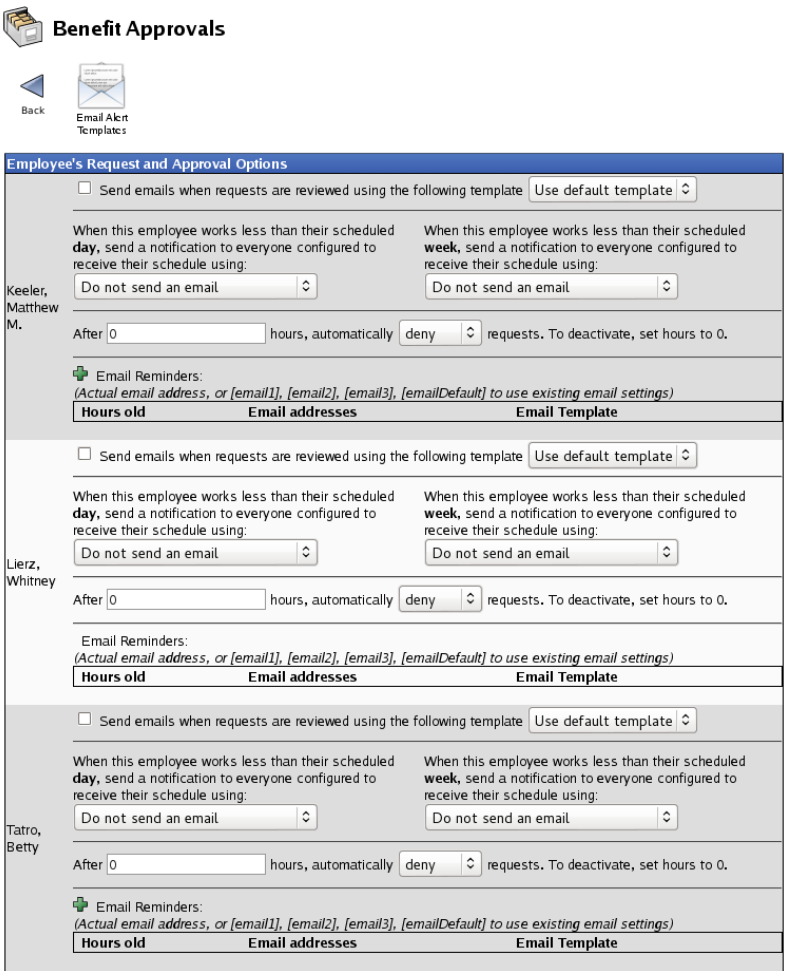
- If you have created a customized **Email Template**, choose it from the drop down list.

  NOTE: Email Templates can be created, edited, and deleted by going to the left pane Main Menu » Administration, click on: System » E-mail Templates.

- Click the **Save** button to implement the changes.

Under the **My Employees' Benefit Request and Approval Options** section, you can also set up the email options for your employees.

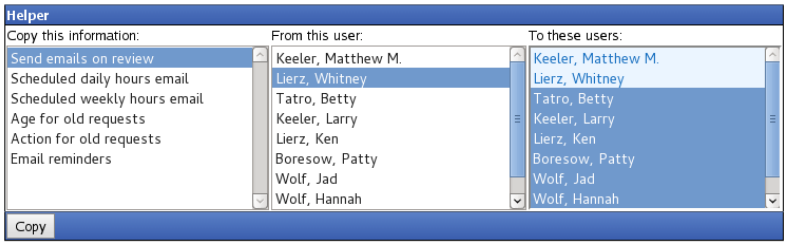
- From the drop down menu, **Select the employee group** or individual.
- Click the **View Employee Options** button.



Once you have entered the **Employee's Request and Approval Options** page, you have the option to:

- Send an email notification to that employee when their benefit requests are reviewed.
- Send an email notification for working less than the scheduled day or week.
- Automatically deny or approve aging requests that are past a user-defined number of hours.

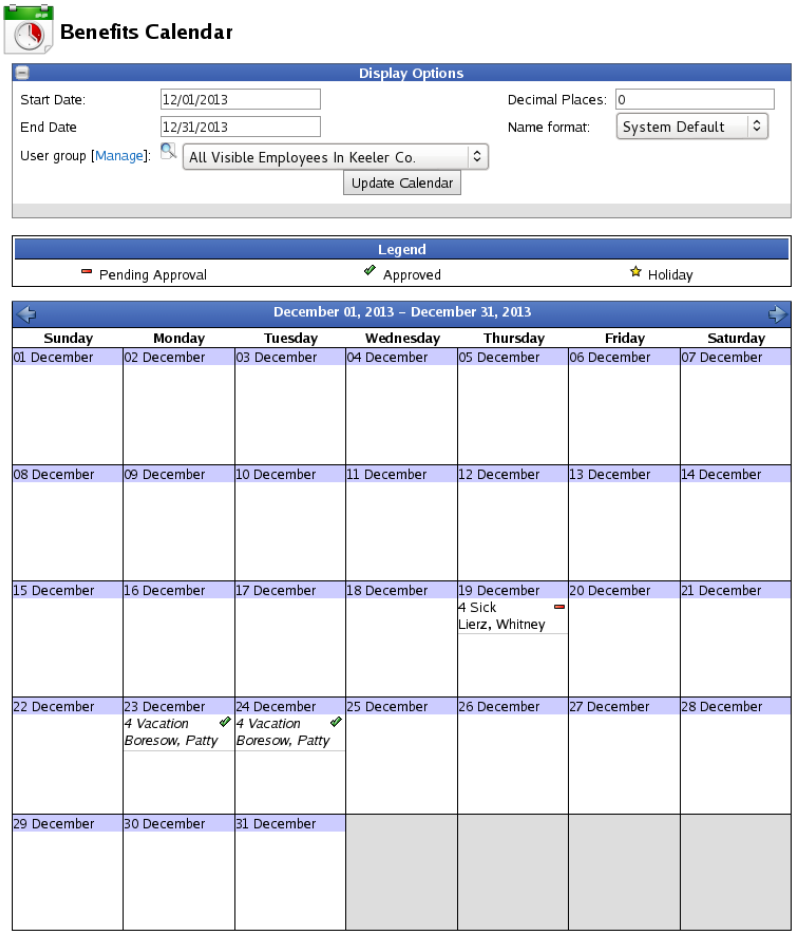
TIP: There is a Helper function (at the very bottom of the page) to copy the same settings from one employee to another to make setup where parameters are identical easy and less time-consuming.



To View the Benefits Calendar

Click on the **Benefits Calendar** icon

at the top of the **Benefit Approvals** page.



Display Options

- Click on the **+** (plus) sign on the far left side of the Display Options bar to expand the window.
- Customize the Date range, Name Format, how many Decimal Places appear in the Benefit Time, and the Employee or Group.
- Click the **Update Calendar** button to view the changes.

Set Reset Recalulate Benefits

Benefits Totals can be set, reset, and recalculated for all employees or for a selected list of employees.

Using the left pane Main Menu » Administration, click on: Benefits » Employee Benefits

TimeIPS Benefits feature allows you to track sick and vacation time accrued and used.

The Payroll Integration with Benefits Tracking module (IPSQBI) is required.

Included features:

- One accrual group
- Two tenure levels
- Vacation and Sick accrual types
- Automatic weekly accruals

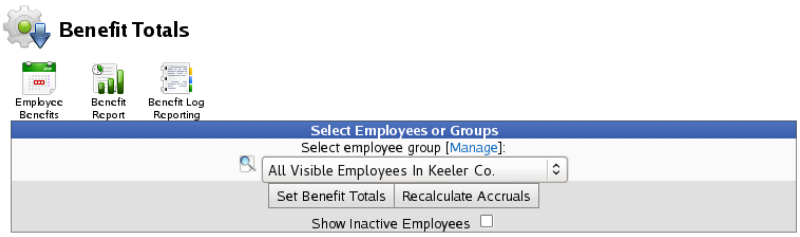
With the optional Advanced Benefits Tracking module (IPSBEN), the following features are added:

- Unlimited accrual groups
- Unlimited tenure levels
- Unlimited custom plus Vacation and Sick accrual types
- Flexible accrual periods
- Enhanced configuration options including caps and prorating

SET : RESET : RECALCULATE

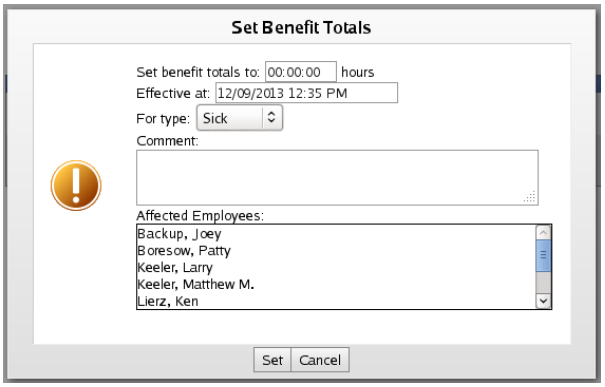
To Set, Reset, or Recalculate Benefits, click on the **Set/Reset Recalculate** icon

at the top of the page.



Set Benefit Totals

- From the drop down menu, choose which **employee or group** will have their benefit totals set.
- Click on the **Set Benefit Totals** button. The following window will appear.



- **Set benefit totals to**: specified hours. This is the amount of time for an employee(s) or groups. The hours will be displayed in decimal hours or hours minutes and seconds. This can be changed under My Settings > Display tab.
- **Effective at**: mm/dd/yyyy and hh:mm:ss. This is the effective date and time the benefit reset will occur for the specified employees.
- **For type**. Select the type of benefit which will be used for the employee(s) or groups..
- Optionally, add a brief **Comment** explaining why the time is being set manually.
- The **Affected Employee(s)** list shows which employee(s) will have their benefit totals set.
- Click on the **Set** button to implement the change.

Resetting Benefit Totals

A benefit reset is a fixed point in an employee's benefit history. It is an assertion that the employee definitively has a certain number of hours at a certain time. If your company's policy requires benefit totals to be reset to a fixed value at a scheduled time, such as resetting unused benefits to 0 at the beginning of each year, this adjustment can be made using a benefit reset. Benefit resets can also be used to set an initial value for employees, such as benefit hours earned before using TimeIPS, or to correct errors.

Benefits can be reset in THREE WAYS:

1. To reset a benefit total **for an employee**, click the **Reset** link located to the far right of the desired Benefit type in the Current Levels section on the **Employee Benefit Details** page. This will open a window allowing you to specify the new total, the date the reset becomes effective, and a comment explaining the reason for the reset.
2. To reset benefit totals **for multiple employees**, use the **Set Benefits Total** option described above. This will open a dialog window allowing you to specify the new total, the date the reset becomes effective, the benefit type to be reset, and a comment explaining the reason for the reset. The dialog also includes a list of employees that will be affected by the reset.
3. Benefit totals may also be reset using the **Benefits Import function**, described below.

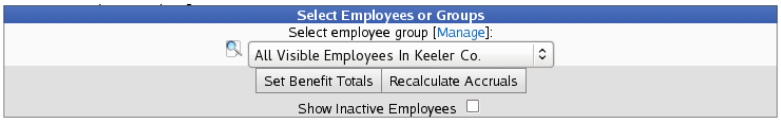
NOTES: Benefit resets may be scheduled at any time in the future or in the past. If scheduled in the past, accruals after the reset will be recalculated starting at the time of the reset. If scheduled in the future, accruals will continue as normal until the time of the reset, at which time accruals will start over at the specified value.

Accruals will be given in full, after a benefit reset; the reset does not imply any sort of prorated or truncated behavior, even if "Prorate Partial Periods" is selected. For example, if employees earn 2 hours per year on January 1st, a reset to 3 hours at any time during the year (even on December 31st) will result in a total of 5 hours available after the next accrual on January 1st.

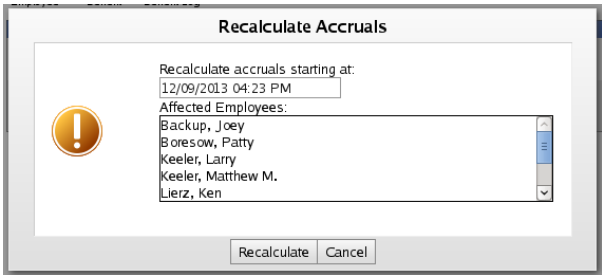
TIP: For best results, use an effective date for resets that makes the intent clear. If benefits are scheduled to reset at the same time (during the same second) that accruals are scheduled to be calculated, the reset will apply after the accrual, that is, the accrual will have no effect on the total available benefit hours.

Recalculate Accruals

If there have been any changes in the Accruals or time worked, you may wish to Recalculate Accruals to ensure accurate information in the employees benefit record. After changing accrual rules, all subsequent accruals will use the updated settings. To apply modified rules to time past, the accruals must be recalculated. If historical accruals before a set date need to be preserved, even if changes have been made, do not recalculate prior to such a date.



- From the drop down menu, choose which **employee or group** will have their accruals recalculated.
- Click on the **Recalculate Accruals** button. The following window will appear.



This window will allow you to change the date and time of the Accrual Recalculation and shows a listing of the effected employees.

- Enter a **date** to begin the updated calculation. All accruals received after the selected time will be removed and updated accruals will be calculated.
- Click the **Recalculate** button to process the request.

Changes in TimeIPS that can cause accruals to recalculate automatically:

- When using work-based accruals or work-based tenure, editing worked time will cause accruals after the edited time to be recalculated.
- Using benefits or editing benefit usage will cause accruals after the benefit's effective date to be recalculated.
- Resetting benefits (see below) will cause accruals after the reset date to be recalculated.
- Changing an employee's accrual group membership will cause accruals after the effective date of the change to be recalculated.

Other changes do NOT cause accruals to be automatically recalculated. Some noteworthy examples include:

- Editing an employee's start date will not cause accruals to be recalculated. (See the note at the end of the "General tab" section above.)
- Editing accrual settings will not cause accruals to be recalculated. These changes only affect future accruals unless a recalculation is requested.

Benefits Report

The Benefits Report allows you to create a report showing sick and/or vacation time accrued and used by each employee during a specified range of time.

The Payroll Integration with Benefits Tracking module (IPSQBI) is required.

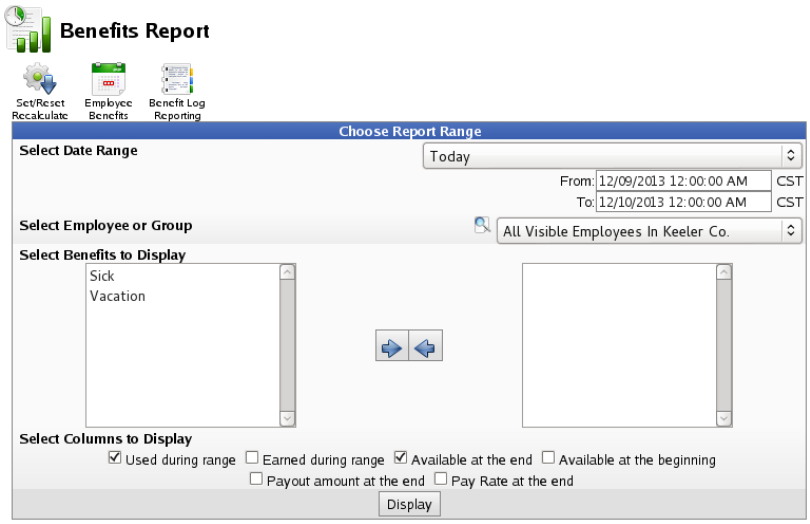
Included features:

- One accrual group
- Two tenure levels
- Vacation and Sick accrual types
- Automatic weekly accruals

With the optional Advanced Benefits Tracking module (IPSBEN), the following features are added:

- Unlimited accrual groups
- Unlimited tenure levels
- Unlimited custom plus Vacation and Sick accrual types
- Flexible accrual periods
- Enhanced configuration options including caps and prorating

Using the left pane Main Menu » Administration, click on: Benefits » Benefits Report



- **Select Date Range:**
  - Use the drop down menu to select a predefined range, such as "This week", "This Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- **Select Employee or Group** to filter which Employees you would like to see in the report. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.
- **Select Benefits to Display**: This feature allows you to include or exclude the different benefit types used in the report.
  - To **incude** a benefit type, click on the type in the box on the left, then click the blue arrow pointing to the right.
  - To **exclude** a benefit type, click on the type in the box on the right, then click the blue arrow pointing to the left

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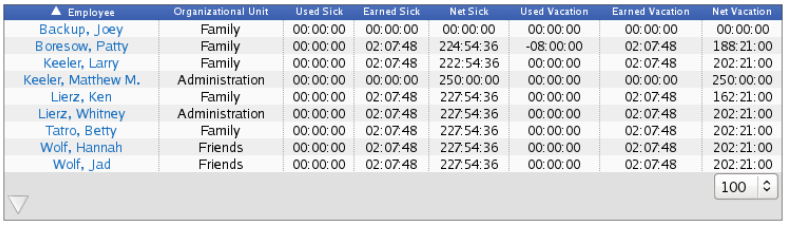
TIP: Hold down the Control key to highlight and move mulitple employees at once.

- **Select Columns to Display**: Check the boxes associtated with the columns you would like to display on the report.
- Click on the **Display** button to view report.



Employee	Organizational Unit	Used Sick	Earned Sick	Net Sick	Used Vacation	Earned Vacation	Net Vacation
Backup, Joey	Family	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
Boresow, Patty	Family	00:00:00	02:07:48	224:54:36	-08:00:00	02:07:48	188:21:00
Keeler, Larry	Family	00:00:00	02:07:48	222:54:36	00:00:00	02:07:48	202:21:00
Keeler, Matthew M.	Administration	00:00:00	00:00:00	250:00:00	00:00:00	00:00:00	250:00:00
Lierz, Ken	Family	00:00:00	02:07:48	227:54:36	00:00:00	02:07:48	162:21:00
Lierz, Whitney	Administration	00:00:00	02:07:48	227:54:36	00:00:00	02:07:48	202:21:00
Tatro, Betty	Family	00:00:00	02:07:48	227:54:36	00:00:00	02:07:48	202:21:00
Wolf, Hannah	Friends	00:00:00	02:07:48	227:54:36	00:00:00	02:07:48	202:21:00
Wolf, Jad	Friends	00:00:00	02:07:48	227:54:36	00:00:00	02:07:48	202:21:00

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The amount of time available at the end of the report range **does not include usages, accruals, or resets after that point**, and employees may not be able to request benefit use immediate after the range if their accrual rules don't allow them.

If you have sufficient permissions, this report can also include **employee pay rate** information, as well as the **equivalent payout amount** for the benefit type. When calculating this payout amount, the amount of benefit time available at the end of the period is used. If the employee is a salaried employee, the employee's pay rate and payout amounts will appear bolded as an indicator.

If you click on the employee's name in the report, that employee's Benefit Details are displayed.

Benefits Log

TimeIPS Benefits Log provides a way to see all kind of benefits, accruals, resets and use in one place.

The Payroll Integration with Benefits Tracking module (IPSQBI) is required.

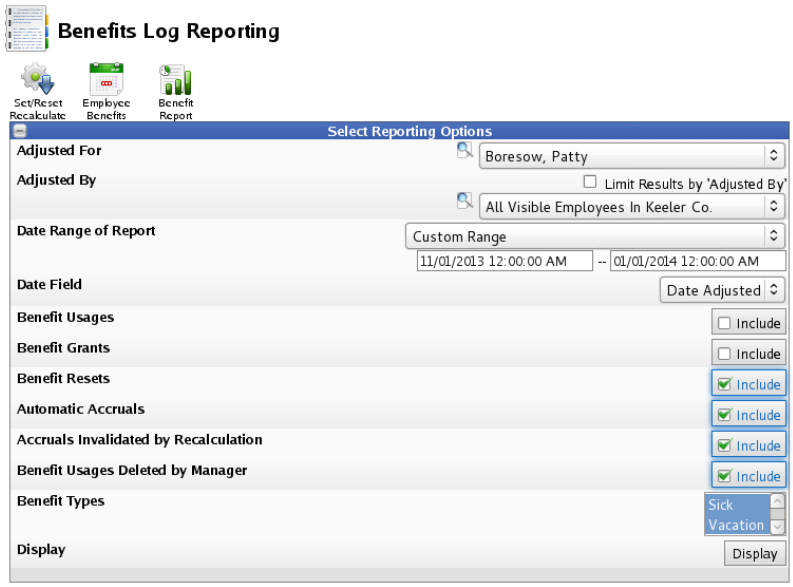
Included features:

- One accrual group
- Two tenure levels
- Vacation and Sick accrual types
- Automatic weekly accruals

With the optional Advanced Benefits Tracking module (IPSBEN), the following features are added:

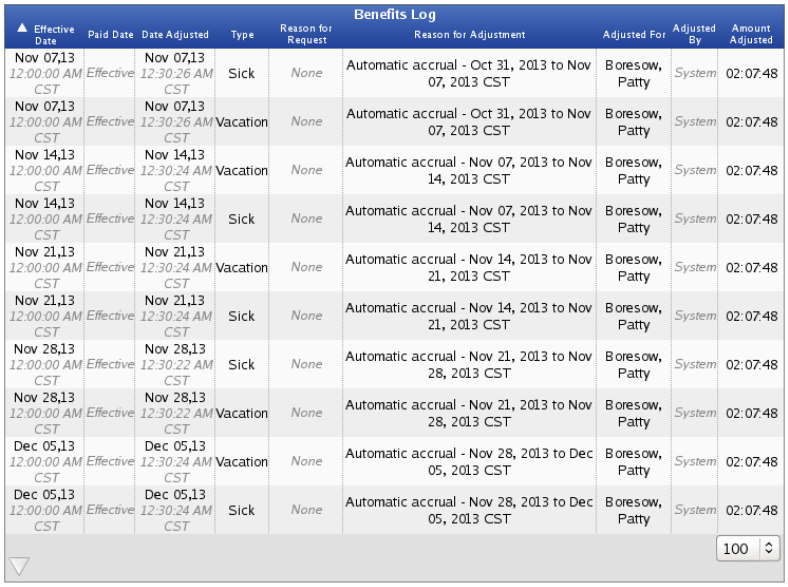
- Unlimited accrual groups
- Unlimited tenure levels
- Unlimited custom plus Vacation and Sick accrual types
- Flexible accrual periods
- Enhanced configuration options including caps and prorating

Using the left pane Main Menu » Administration, click on: Benefits » Benefits Log



The **Benefit Log Report** allows you to run a report for employee(s) adjustments to benefits. Here you will set the criteria that is specific to either individual employee or groups of employees.

- **Adjusted For**: From the drop down list, select the employee or group of employees that were adjusted.
- **Adjusted By**: Optionally, check the "Limit Results by 'Adjusted By'" box, then select the employee or group of employees that made the adjustment.
- **Date Range of Report**:
  - Use the drop down menu to select a predefined range, such as "This week", "This Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- The **Date Field** in the benefits log can apply to the "Date Adjusted", Effective Date, or "Paid Date". From the drop down list, choose which date you would like displayed on the log.
- The next list of options can be checked to include one or more types of adjustments within the report. These include:
  - **Benefit Usages**
  - **Benefit Grants**
  - **Benefit Resets**
  - **Automatic Accruals** This includes all automatic system accruals regardless to the "Adjusted By" section.
  - **Accruals Invalidated by Recalculation**
  - **Benefit Usages Deleted by Manager**
  - **Benefit Types** From the drop down list, choose which benefit types to include in the report. Hold down the Ctrl key while clicking to select multiple types.
- Click the **Display** button to generate the report.



Benefits Log

▲ Effective Date	Paid Date	Date Adjusted	Type	Reason for Request	Reason for Adjustment	Adjusted For	Adjusted By	Amount Adjusted
Nov 07,13 12:00:00 AM CST	Effective	Nov 07,13 12:30:26 AM CST	Sick	None	Automatic accrual - Oct 31, 2013 to Nov 07, 2013 CST	Boresow, Patty	System	02:07:48
Nov 07,13 12:00:00 AM CST	Effective	Nov 07,13 12:30:26 AM CST	Vacation	None	Automatic accrual - Oct 31, 2013 to Nov 07, 2013 CST	Boresow, Patty	System	02:07:48
Nov 14,13 12:00:00 AM CST	Effective	Nov 14,13 12:30:24 AM CST	Vacation	None	Automatic accrual - Nov 07, 2013 to Nov 14, 2013 CST	Boresow, Patty	System	02:07:48
Nov 14,13 12:00:00 AM CST	Effective	Nov 14,13 12:30:24 AM CST	Sick	None	Automatic accrual - Nov 07, 2013 to Nov 14, 2013 CST	Boresow, Patty	System	02:07:48
Nov 21,13 12:00:00 AM CST	Effective	Nov 21,13 12:30:24 AM CST	Vacation	None	Automatic accrual - Nov 14, 2013 to Nov 21, 2013 CST	Boresow, Patty	System	02:07:48
Nov 21,13 12:00:00 AM CST	Effective	Nov 21,13 12:30:24 AM CST	Sick	None	Automatic accrual - Nov 14, 2013 to Nov 21, 2013 CST	Boresow, Patty	System	02:07:48
Nov 28,13 12:00:00 AM CST	Effective	Nov 28,13 12:30:22 AM CST	Sick	None	Automatic accrual - Nov 21, 2013 to Nov 28, 2013 CST	Boresow, Patty	System	02:07:48
Nov 28,13 12:00:00 AM CST	Effective	Nov 28,13 12:30:22 AM CST	Vacation	None	Automatic accrual - Nov 21, 2013 to Nov 28, 2013 CST	Boresow, Patty	System	02:07:48
Dec 05,13 12:00:00 AM CST	Effective	Dec 05,13 12:30:24 AM CST	Vacation	None	Automatic accrual - Nov 28, 2013 to Dec 05, 2013 CST	Boresow, Patty	System	02:07:48
Dec 05,13 12:00:00 AM CST	Effective	Dec 05,13 12:30:24 AM CST	Sick	None	Automatic accrual - Nov 28, 2013 to Dec 05, 2013 CST	Boresow, Patty	System	02:07:48

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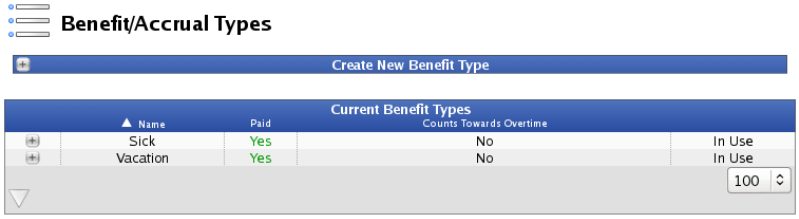
Benefit Types

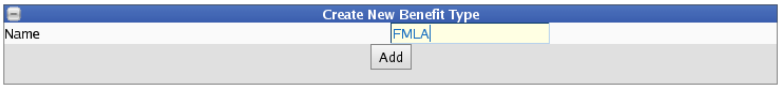
Benefit Types provide a classification for non-worked time (such as sick and vacation) that can be allocated to employees. These types can be paid or unpaid, can optionally count toward overtime hours, and can be configured to automatically accrue if configured in the Accruals section.

*With the **Advanced Benefits Tracking module (IPSBEN)**, custom benefit types can be created or edited.*

Using the left pane Main Menu » Administration, click on: Benefits » Benefit Types

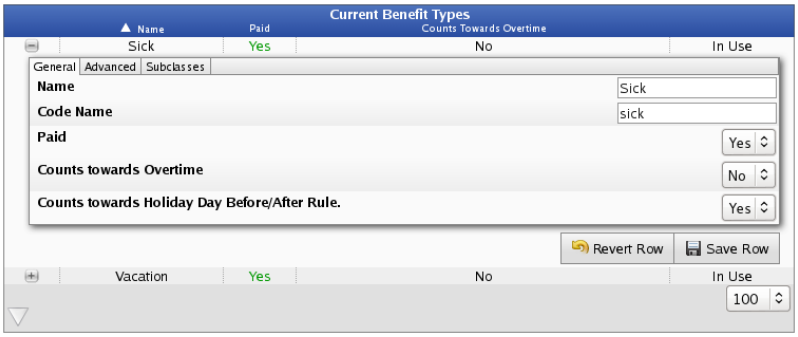


Create a New Benefit Type



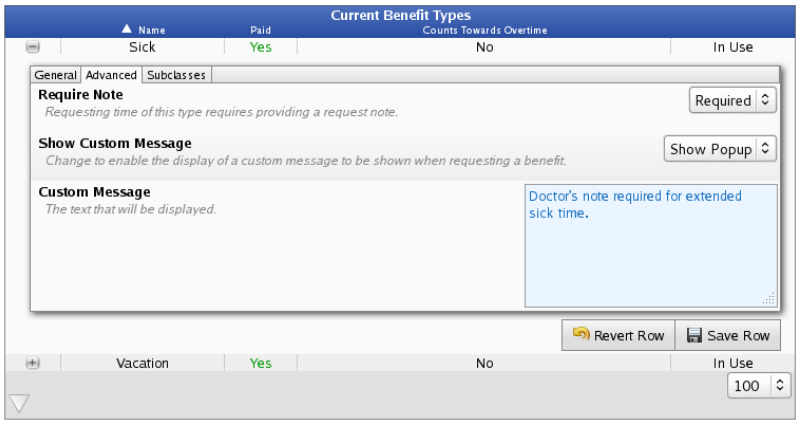
- Click on the **+** (plus) sign on the left side of the **Create New Benefit Type** bar.
- Add a descriptive **Name**, then click the **Add** button.

Edit a Benefit Type



- Click on the **+** (plus) sign next to the benefit **Name**.
- If using divisions, a **Code Name** can be specified that will allow reports that include benefits from multiple divisions to appear in the same column.
- If the benefit type is **Paid**, select "Yes" for the Paid option. This is normally set to "Yes".
- If the benefit counts as actual work time toward 40 hours/week for overtime, then select "Yes" for **Counts towards Overtime**. This is normally set to "No".

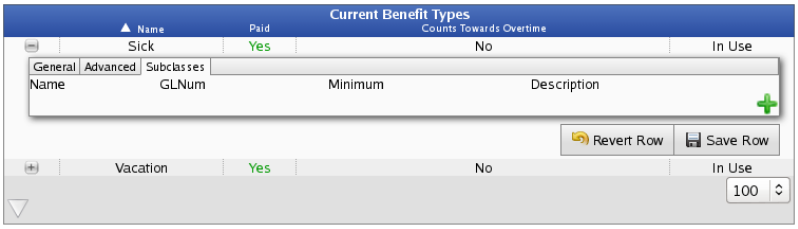
Advanced Options



- From the Advanced tab, you can require the employee to add a **note** when requesting this type of benefit.
- To display a custom message when this type of benefit is requested, select "Show Popup" from the drop down list. Then type the message in the **Custom Message** box.
- Click **Save Row** to save the changes.

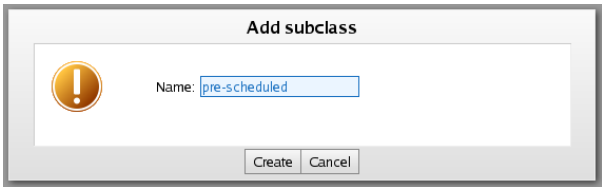
Subclasses

Subclasses can be used to track projects, departments, areas or other designations related to the benefit, the employee, or why the benefit was used.

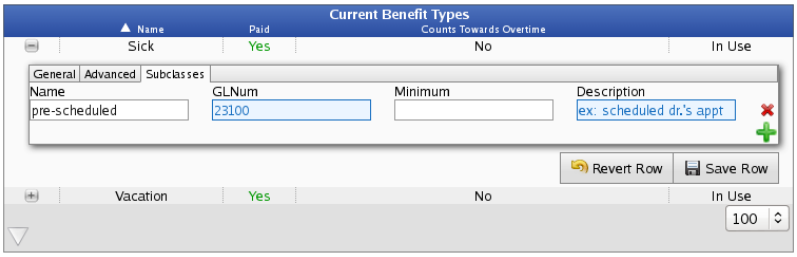


Add a Subclass

- Click on the green **+** on the far right side.



- Add a descriptive **Name** in the Add Subclass window that pops up, then click the **Create** button.



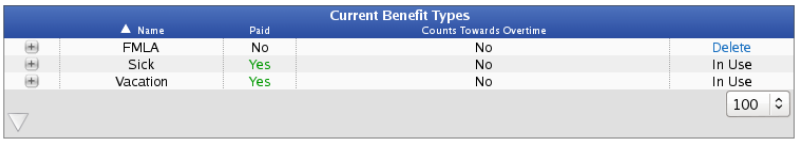
- Add a **GLNum**, a **Minimum** (if applicable), and a **Description** for the subclass.

NOTE: By using the GLNum field, it is possible to designate how benefit time will be tracked in an external accounting system.

- Click **Save Row** to save the changes.
- To **delete** a subclass, click on the red **X** on the far right side.

Deleting a Benefit Type

In order to delete a benefit type, that type must not be in use. Once it has been used, it can not be deleted.



- In the far right column, click the word **Delete** that appears in the same row as the benefit type you wish to delete.

Accruals

Accrual Groups provide a way to set the types and amount of benefits that will be accrued for employees. If you have groups of employees who earn different benefits or at different rates (hourly and salary, for example), create an accrual group for each and set the accrual rules as needed.

The Payroll Integration with Benefits Tracking module (IPSQBI) is required.

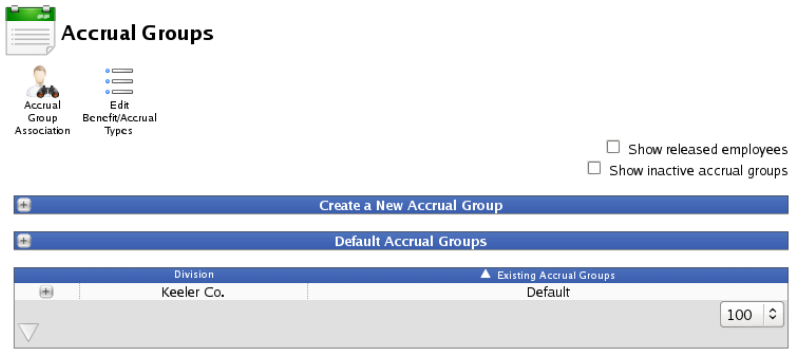
Included features:

- One accrual group
- Two tenure levels
- Vacation and Sick accrual types
- Automatic weekly accruals

With the optional Advanced Benefits Tracking module (IPSBEN), the following features are added:

- Unlimited accrual groups
- Unlimited tenure levels
- Unlimited custom plus Vacation and Sick accrual types
- Flexible accrual periods
- Enhanced configuration options including caps and prorating

Using the left pane Main Menu » Administration, click on: Benefits » Accruals



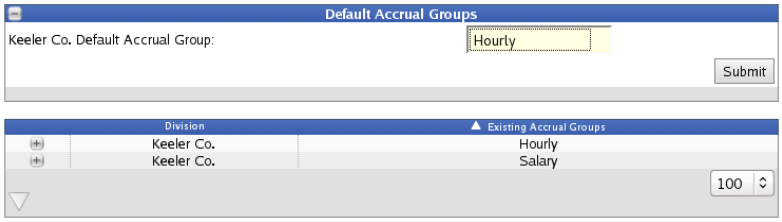
Accrual Groups are used to track a set of employees with related accrual rules. Most companies will only need one accrual group. Separate groups are useful when you have multiple classes of employees with different rules; for example, a company may have different benefit rules for full-time and part-time employees.

Create an Accrual Group

- Click the **+** (plus) sign on the left side of the **Create New Accrual Group** bar.
- **Copy from Existig Group**: To copy the settings from another group, select that group from the drop down list.
- Provide a descriptive **Name** for the group.
- Click the **Create Group** button. The page will refresh to allow you to configure accruals for the new group.

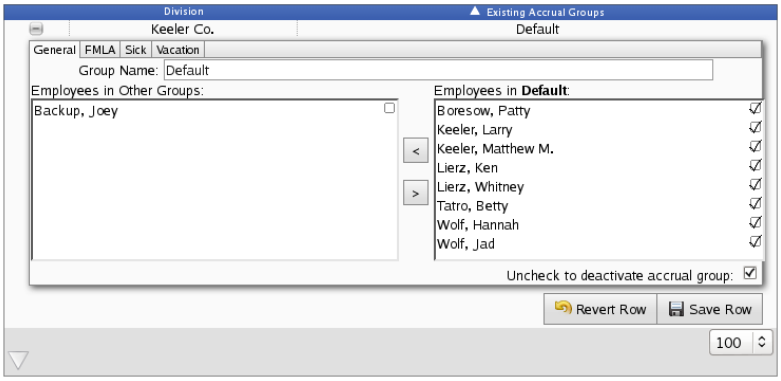
Use a Default Accrual Group

If there is more than one accrual group, select one of them to be the **Default Group**. Employees will automatically be associated with this group (and therefore will be effected by this groups accrual terms), unless they are manually designated into a different group.



Edit an Accrual Group - General

- Click the **+** (plus) sign next to the group's name to expand the settings section.

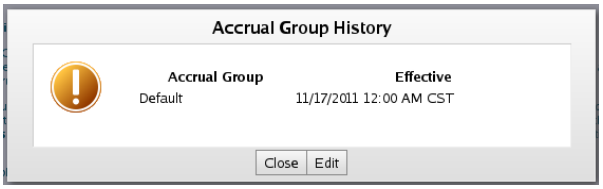


The **General** tab configures the employees who belong to the group.

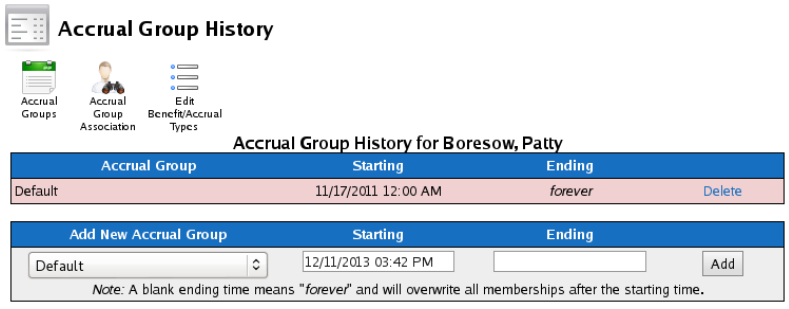
- The **Group Name** can be changed by simply typing over the exisitng name.
- Move or remove **Employees** from the Group by simply clicking on their name(s) and then clicking the left or right arrow.
  - Employees who do not currently belong to the accrual group appear in the list on the left. If the employee belongs to another group, that group's name will be displayed beside the employee's name.
  - Employees who currently belong to the accrual group appear in the list on the right. Each employee will have an icon: an empty box, a box containing a check mark, a green arrow, or a red arrow.
    - The **empty box** indicates that the employee is not a member of the group and is not scheduled to join the group in the future.
    - The **check mark** indicates that the employee is a member of the group and is not scheduled to leave the group.
    - The **green arrow** indicates that the employee is not a member of the group, but is scheduled to join the group at some time in the future; hovering the mouse cursor over the arrow will display the time that the employee will join the group.
    - The **red arrow** indicates that the employee is currently a member of the group, but is scheduled to leave the group at some time in the future; hovering the mouse cursor over the arrow will display the time that the employee will leave the group.

  NOTE: If an employee is scheduled to leave an accrual group at the same time (during the same second) that accruals for that group are scheduled to be calculated, the employee will receive the final accrual for that group before leaving.

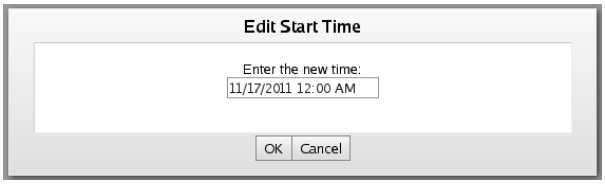
- Clicking any of these icons will open a dialog displaying the employee's entire **Accrual Group History**.



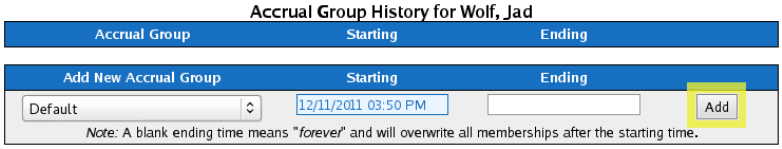
  - To make changes to the employee's Accrual Group History, click the **Edit** button.



  - To edit the **Starting** or **Ending** date, click on the date in the pink section.



- Type in a new date and click the **OK** button.



To Add the employee to a **New Accrual Group**:

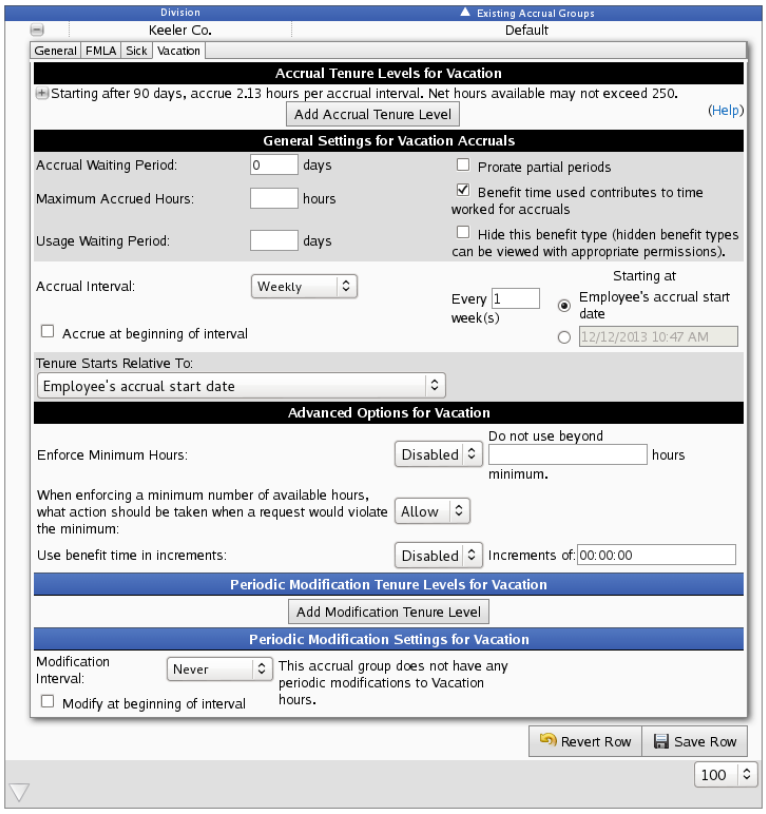
- Select the **Accrual Group** from the drop down list.
- Add the **Starting** and **Ending** date.

NOTE: A blank ending time means "*forever*" and will overwrite all memberships after the starting time.

- Click the **Add** button.

Edit an Accrual Group by Benefit Type

The remaining tabs are for specific accrual types, such as Sick or Vacation. The top part of these tabs contains the tenure levels for the accrual type, the middle sections contain general and advanced settings that apply regardless of tenure, while the bottom section allows for periodic modificaitons of both tenure and general settings.

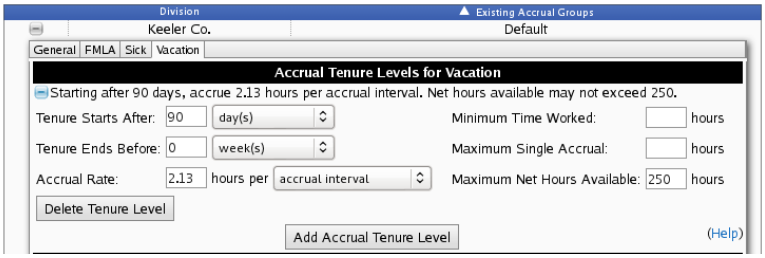


Tenure Levels

Tenure levels allow employees to earn different amounts of benefits based on how long they have been employed. When the TimeIPS Accrual Engine calculates benefits for an employee it will select tenure levels strictly based on the **Tenure Starts After** and **Tenure Ends Before** fields.

In the event that more than one tenure level could apply at the same time, the level that the employee qualified for most recently is selected, even if it accrues a lower benefit amount. *Caution: Do not*

configure two or more tenure levels to become active at the same time. For example, do not create a tenure level that starts after 14 days, and another that starts after 2 weeks. If this does occur, TimeIPS will simply pick one of the two levels and apply it.

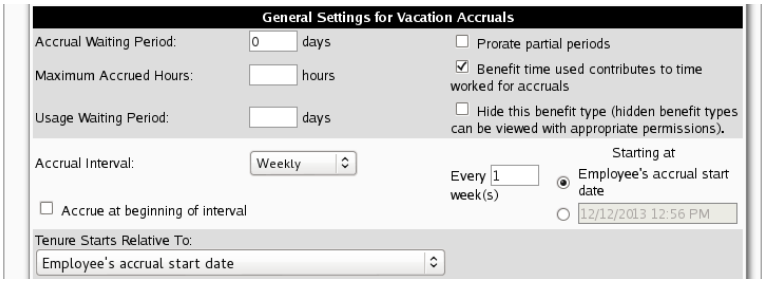


- Click on the **+** (plus) sign on the far left next to the **Accrual Tenure Level** description.
- To remove the current Tenure Level settings, click the **DELETE Tenure Level** button.
- To **EDIT** the exisiting settings, make the needed changes and then click the **Save Row** button.
  - **Tenure Starts After**: TimeIPS supports two types of tenure levels: time-based and work-based.
    - **Time-based tenure** means that employees enter the tenure level after a minimum amount of calendar time has elapsed. Time-based tenure is specified by selecting "day(s)," "week(s)", "month(s)" or "year(s)" in this field.
    - **Work-based tenure** means that employees enter the tenure level after a minimum amount of hours have been worked. Work-based tenure is specified by selecting "hour(s) worked" in this field. Employees will receive accruals based on the longest tenure for which they qualify. If both time-based and work-based tenure levels are used, the level which provides the greater number of hours is used.
  - **Tenure Ends Before**: This is normally set to "**0**" which indicates there is no defined ending. For situations that require an end date, specify the time using the drop down list.

    EXAMPLE: A company grants its employees a higher benefit accrual rate only on certain years. In the 1st, 2nd, 3rd, and 4th years employees earn 1.0 hours per accrual interval. In the 5th year, employees receive 1.5 hours per interval, but in the 6th year, it goes back to the 1.0 accrual rate This would be accomplished by having a standard tenure level with a 1.0 accrual rate with the "Tenure Ends Before" set to "0", then a second Tenure Level with a 1.5 accrual rate set to Start After 5 years and Ends Before 6 years.

  - **Accrual Rate**: TimeIPS also supports time-based and work-based accrual rates. Time-based rates earn benefit hours based on calendar time elapsed; they are specified by selecting "Accrual Interval" or "Calendar Year" in this field. Work-based rates earn benefit hours based on hours worked by the employee; they are specified by selecting "hour worked," "40 hours worked," or "2080 hours worked" in this field.
    - **Time-based rates**: When the rate is specified as "accrual interval," the specified number of hours are given as a lump sum at the end of each accrual interval. When the rate is specified as "calendar year," the specified number of hours is divided among accrual intervals such that the employee will earn exactly the specified number of hours over the course of one calendar year. Note: When using time-based rates, an employee will earn benefits based on his/her tenure at the end of the accrual interval.
    - **Work-based rates**: The three work-based rate options are all equivalent in terms of calculation, so choose the option that is most convenient to express your company's accrual policy. If your policy determines accruals based on a different base number of hours, divide the desired accrual by the number of hours worked to determine the accrual rate, and select "hour worked." Note: When using work-based rates, an employee earns benefits at the rate effective at the time the hours are worked. *NOTE: If an employee changes tenure levels during an accrual interval, the accrual will be calculated with the hours worked during each tenure level, using the rate for the tenure level effective at that time, and then adding them up.*
    - **Mixed rates**: If accrual periods do not align with tenure level changes, it is recommended that all tenure levels use the same rate type (either time-based or work-based). In the event that they must be mixed, and they do not align with tenure changes, situations will arise where one accrual calculation has some time-based tenure and some work-based tenure. TimeIPS will grant the employee the accrual type (either time-based or work-based) which caclucated to the most benefit time. The time will NOT be added together or pro-rated.
  - **Minimum Time Worked**: (This option requires the IPSBEN module.) To require employees to work a minimum number of hours during the accrual interval to qualify to earn any benefit hours, specify that time here.
  - **Maximum Single Accrual**: (This option requires the IPSBEN module.) To limit the maximum number of hours that can be earned in a single accrual interval, specify a number here. This option is only useful with work-based rates. For example, if the Maximum Single Accrual is set to 1 hour and vacation hours accrue at a rate of 1 hour per 40 hours worked, an employee who worked 60 hours during the accrual interval would only earn 1 hours. If this option is not set, the employee would have earned 1.5 hours.
  - **Maximum Net Hours Available**: (This option requires the IPSBEN module.) This option is related to the "Maximum Accrued Hours" option above, but can be set according to an employee's tenure. If set, employees earning benefit hours based on the tenure level will not be able to exceed the specified number of hours available. For example, if employees are limited to having 48 hours of vacation stored up at a time until they have worked at least one year, set this option to 48 for all tenure levels that apply at less than one year of employment. If your company policy has a fixed limit regardless of tenure, leave this option blank and use the "Maximum Accrued Hours" option in General Settings. If set, this option always overrides the General Settings "Maximum Accrued Hours."
- To create a new tenure level, click the **Add Accrual Tenure Level** button, then apply the terms and save.

General Settings



- **Accrual Waiting Period**: Benefits will not begin accruing until an employee has been employed for this number of days. The waiting period is defined in calendar days, not work days or days worked. Once the waiting period has elapsed, the employee will begin receiving benefit hours. The waiting period only applies to new hires. Changing accrual groups does not require an additional waiting period. Note that accruals missed during the waiting period will never be earned. The employee will receive the complete value of the next accrual after the waiting period elapses unless "Prorate partial periods" is selected. The difference between setting a 30 day waiting period vs. setting the first tenure level to start after 30 days is that a 30 day waiting period will prorate the accrued amount for a partial period (when prorating is turned on) while no prorating will be applied to a partial period when using a tenure level that starts after 30 days.
- **Maximum Accrued Hours**: If set, this will limit accruals for employees so they will not have more the specified number of unused hours. Accruals beyond this cap will be lost and will appear in the "Hours Lost" column of the Benefits page. If set, the "Maximum Net Hours Available" for the tenure level that the employee qualifies for will be used instead of this value.
- **Prorate Partial Periods**: If this is checked, the accrual for an employee who is hired or changes accrual groups during an Accrual Interval will be prorated according to the time spent in the group. As an example, if vacation accrues yearly on January 1st and an employee is hired on December 1st, the employee would get approximately 1/12 of that year's accrual on January 1st. If this option is disabled, the employee would receive the entire year's accrual. Note that this option prorates on top of any prorating based on hours worked (see below); most companies will not use Prorate Partial Periods in conjunction with one of these accruals. Note: This option only applies when an employee is hired or changes accrual groups. See "Tenure Levels," below, for a description of how tenure affects prorating.

- **Benefit time used contributes to time worked for accruals**: If this is checked, hours of this benefit are considered time worked for accruals. This affects accruals earned based on hours worked, accruals requiring a minimum number of hours worked, and tenure levels based on total hours worked. For example, if this option is enabled for Sick benefits, and Vacation benefits accrue at a rate of 1 hour per 40 hours worked, an employee who uses 40 hours of Sick time would accrue 1 hour of Vacation, just as if that employee had worked the full time. If this option is disabled, the employee would not receive any Vacation time. This setting has no effect on overtime calculations.

- **Hide this Benefit type:** If this is NOT checked, employees will be able to see this benefit type, request the use of this benefit and see accrued benefit levels, even if they do not have permission to edit benefit types. If this is checked, only managers (or other employees with benefit edit permission) will be able to see and use this benefit type. Note: If this benefit type is used, the employee will always see the benefit use on reports, including My Timesheet and My Work History. Checking this option is intetended to reduce employee perception of "if I have it, why can't I use it" on special benefit types where only a manger would decide to use it for an employee.

- **Accrual Interval**: This determines how often accruals are calculated and given to employees. Only "Weekly" and "Never" are available without the IPSBEN module. Additionally, the interval cannot be set to multiple weeks (for example, every 2 weeks) without IPSBEN. With IPSBEN, "Weekly," "Monthly," and "Yearly" are available in any multiple, as well as "Semimonthly" and "Quarterly" with specified accrual dates. Use these options and a specified starting date to fit your company policy. Accruals are not calculated before the **starting date** and recur at the specified interval after it. For example, if employees receive all of their benefits at the end of each year worked for the company, specify "Yearly," every "1" year(s), starting at employee's hire date.

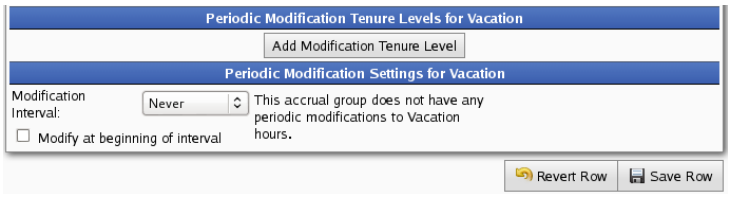
NOTE: Accruals use the date when the employee first joined an accrual group to determine the employee's accrual start date. This date is usually the same as the date in the "Start Date" field in Employee Administration, but these dates can be different if necessary for your company's accrual policy.

Advanced Options

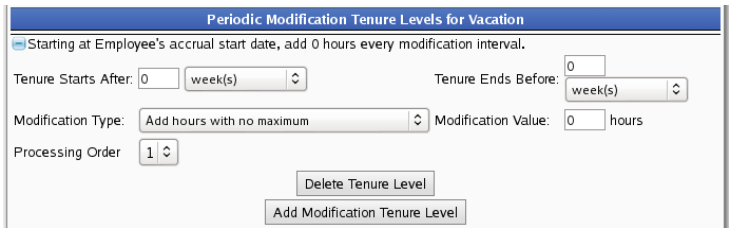
- **Enforce Minimum Hours**: The option to enforce minimum hours can be used to prevent managers from using or approving benefits that would result in the employee having fewer available hours than configured. For example, if employee should never go negative, set this option to "Enabled" and set the Do not use beyond minimum to 0.
- **Do not use beyond minimum**: The minimum hours that can be available when using "Enforce Minimum Hours" option. This number can be positive, 0 or negative. Providing a negative number allows employees to use some benefit "ahead" of their earning.
- **What to do when a request exceeds available hours**: If a benefit use or request approval exceeds the amount being enforced, there are several options on how it should be handled.
  - Choose "Allow" to allow one final request even if it puts the employee below the minimum. No further requests will be allowed. For example, if the employee has 7 hours available, and asks for 8, with a minimum of 0, then the 8 hours will be allowed, putting the employee at -1. No further requests will be allowed until the employee has a positive benefit balance.
  - Choose "Reduce" to simply reduce the hours requested to the amount available. For example, if the employee has 7 hours available, and asks for 8, with a minimum of 0, then the actual use will be 7 hours.
  - Choose "Deny" to deny the entire request. For example, if the employee has 7 hours available, and asks for 8, with a minimum of 0, then no hours will be used.
- **Use benefit time in increments**: In some cases it may be desirable to only allow employees to use benefit time in blocks, such as 1/2 day or full days. If enabled, all benefit use will be rounded to the nearest increment.
- **Increments of**: When "Use benefit time in increments" is turned on, all benefit use will be rounded to to an increment as set here. For example, to have employees use benefit in half-day increments, enter 4:00:00. When an employee asks for less than 2 hours, it will be rounded to 0. When an employee asks for 2-6 hours, it will be rounded to 4. When an employee asks for 6-10 hours, it will be rounded to 8, etc.

Periodic Modifications for Tenure Levels

Periodic Modifications can be configured to automatic reduce, add, or reset accrual time.



- Click the **Add Modification Tenure Level** button.

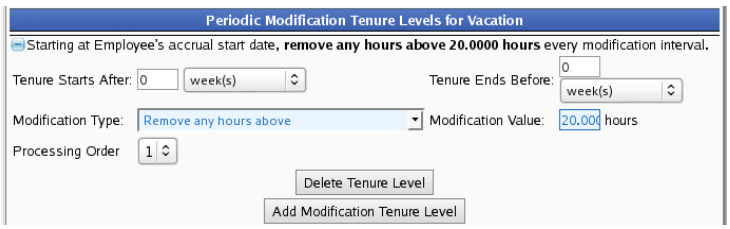


- **Tenure Starts After**: TimeIPS supports two types of tenure levels: time-based and work-based.
  - **Time-based tenure** means that employees enter the tenure level after a minimum amount of calendar time has elapsed. Time-based tenure is specified by selecting "day(s)," "week(s)", "month(s)" or "year(s)" in this field.
  - **Work-based tenure** means that employees enter the tenure level after a minimum amount of hours have been worked. Work-based tenure is specified by selecting "hour(s) worked" in this field. Employees will receive accruals based on the longest tenure for which they qualify. If both time-based and work-based tenure levels are used, the level which provides the greater number of hours is used.

- **Tenure Ends Before**: Choosing "**0**" means there is no defined ending. For situations that require an end date, specify the time using the drop down list.

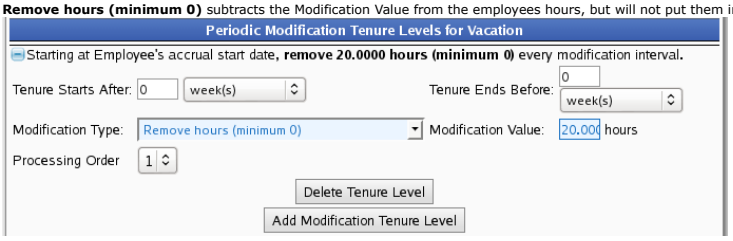
EXAMPLE: A company grants its employees a higher benefit accrual rate only on certain years. In the 1st, 2nd, 3rd, and 4th years employees earn 1.0 hours per accrual interval. In the 5th year, employees receive 1.5 hours per interval, but in the 6th year, it goes back to the 1.0 accrual rate This would be accomplished by having a standard tenure level with a 1.0 accrual rate with the "Tenure Ends Before" set to "0", then a second Tenure Level with a 1.5 accrual rate set to Start After 5 years and Ends Before 6 years.

- **Modification Type**: This is the action the system will take.
  - **Remove any hours above** the Modification Value.



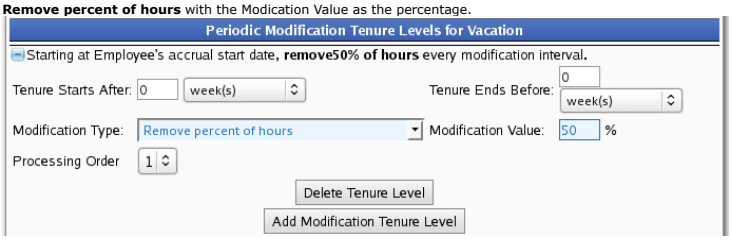
EXAMPLES: Employee #1 has 38 hours at the interval time. After the modification, the employee has 20 hours. Employee #2 has 20 hours at the interval time. After the modification, the employee still has 20 hours. Employee #3 has 10 hours at the interval time. After the modification, the employee still has 10 hours.

  - **Remove hours (minimum 0)** subtracts the Modification Value from the employees hours, but will not put them in the negative.



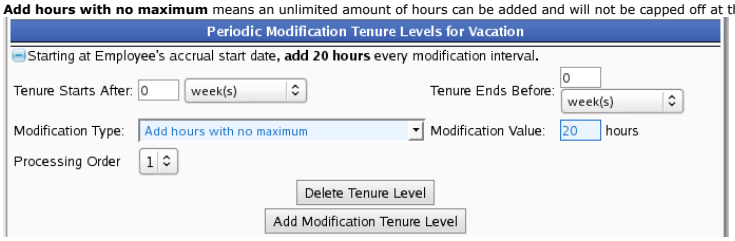
EXAMPLES: Employee #1 has 38 hours at the interval time. After the modification, the employee has 18 hours. Employee #2 has 20 hours at the interval time. After the modification, the employee has 0 hours. Employee #3 has 10 hours at the interval time. After the modification, the employee has 0 hours.

  - **Remove percent of hours** with the Modication Value as the percentage.



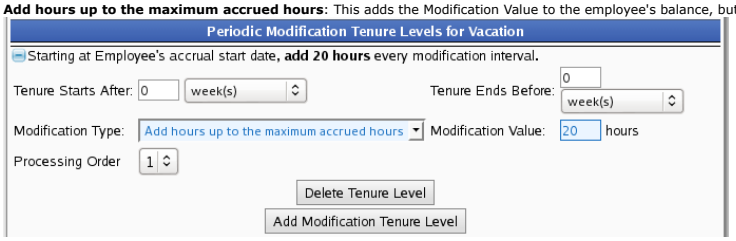
EXAMPLES: Employee #1 has 38 hours at the interval time. After the modification, the employee has 19 hours. Employee #2 has 20 hours at the interval time. After the modification, the employee still has 10 hours. Employee #3 has 10 hours at the interval time. After the modification, the employee still has 5 hours.

  - **Add hours with no maximum** means an unlimited amount of hours can be added and will not be capped off at the maximum net hours that was set in the accural tenure levels section.



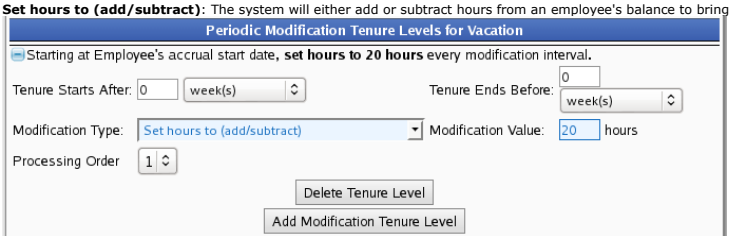
EXAMPLES (with a Maximum Net Hours Available set to 40): Employee #1 has 38 hours at the interval time. After the modification, the employee has 58 hours. This exceeds the 50 hours maximum, but with this modification the maximum is ignored. Employee #2 has 20 hours at the interval time. After the modification, the employee has 40 hours. Employee #3 has 10 hours at the interval time. After the modification, the employee still has 30 hours.

  - **Add hours up to the maximum accrued hours**: This adds the Modification Value to the employee's balance, but will not exceed the defined Maximum Net Hours Available.



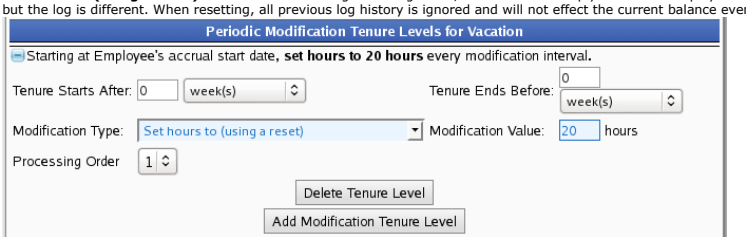
EXAMPLES (with a Maximum Net Hours Available set to 40): Employee #1 has 38 hours at the interval time. After the modification, the employee has 40 hours. Employee #2 has 20 hours at the interval time. After the modification, the employee has 40 hours. Employee #3 has 10 hours at the interval time. After the modification, the employee has 30 hours.

  - **Set hours to (add/subtract)**: The system will either add or subtract hours from an employee's balance to bring the balance to the Modification Value.



EXAMPLES: Employee #1 has 38 hours at the interval time. After the modification, the employee has 20 hours. Employee #2 has 20 hours at the interval time. After the modification, the employee still has 20 hours. Employee #3 has 10 hours at the interval time. After the modification, the employee has 20 hours.

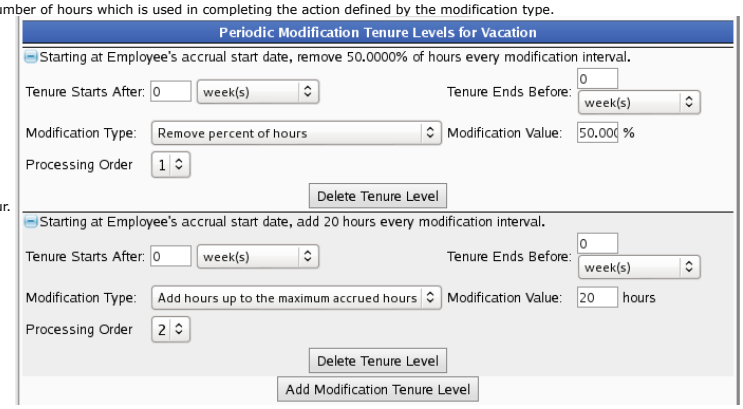
- **Set hours to (using a reset)**: Instead of subtracting or adding hours, the balance is simply reset. The employees' resulting balance is identical to the previous type that "sets hours to", but the log is different. When resetting, all previous log history is ignored and will not effect the current balance even if changes are made to the historical data.



EXAMPLES: Employee #1 has 38 hours at the interval time. After the modification, the employee has 20 hours. Employee #2 has 20 hours at the interval time. After the modification, the employee still has 20 hours. Employee #3 has 10 hours at the interval time. After the modification, the employee has 20 hours.

- **Expression**: For more complicated types that might have multiple actions, use your own customized expression.

- **Modification Value**: This value is either a percentage or a specific number of hours which is used in completing the action defined by the modification type.
- **Processing Order**: The order in which the Periodic Modifications occur.



EXAMPLE (with a Maximum Net Hours Available set to 40): First, the employee's time will be reduced by 50% and then 20 hours will be added to it. Employee #1 has 38 hours at the interval time. After the modifications, the employee has 39 hours. [Math: 38 - 50% = 19 +20 = 39] IF the order was reversed, Employee #1 would have 20 hours after the modifications. [Math: 38 + 20 = 58, but the max is 40. 40 - 50% = 20].

Periodic Modification Settings

- The **Modification Interval** determines the type of frequency for the modification.
- **Every**: Defines the number of repetitinos of the interval type between modifications. For example, select "weekly" and enter "1" to make the modification occur every week.
- The interval can either **Start at** the Employee's accrual start date or a specified date (such as the beginning or end of the year).
- When the **Modify at beginning of interval** box is checked, modifcations will be applied at the beginning of each interval instead of at the end.

Recalculating Accruals

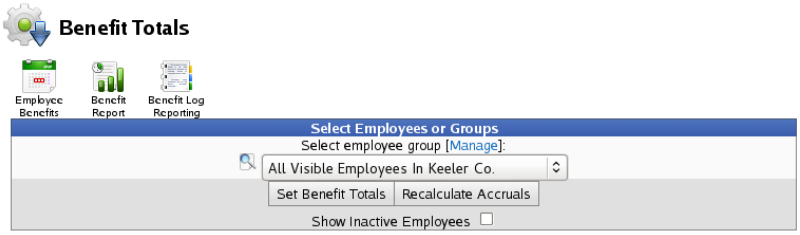
After changing accrual rules, all subsequent accruals will use the updated settings. To apply modified rules to time past, the accruals must be recalculated.

To request recalculation of accruals for all employees or for a selected list of employees, access the Benefit Totals page.

Using the left pane Main Menu » Administration, click on: Benefits » Employee Benefits

Click on the **Set/Reset Recalculate** icon

at the top of the page.

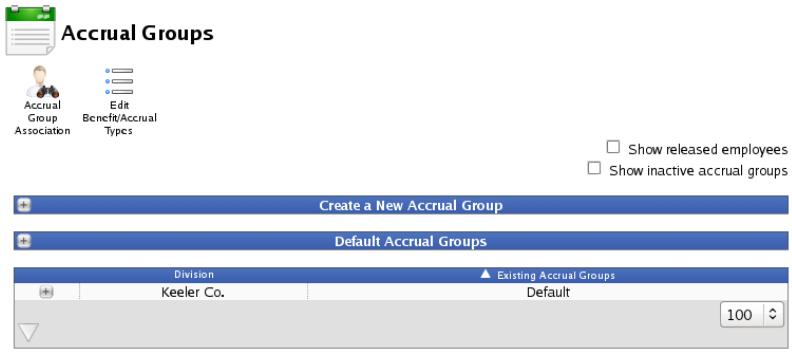


For more information, go to the **Set Reset Recalulate Benefits** article.

Accrual Group Association

The Accrual Associations feature generates a listing of the current accrual group membership for any list of employees.

Using the left pane Main Menu » Administration, click on: Benefits » Accruals



Accrual Groups are used to track a set of employees with related accrual rules. Most companies will only need one accrual group. Separate groups are useful when you have multiple classes of employees with different rules; for example, a company may have different benefit rules for full-time and part-time employees.

The Payroll Integration with Benefits Tracking module (IPSQBI) is required.

Included features:

- One accrual group
- Two tenure levels
- Vacation and Sick accrual types
- Automatic weekly accruals

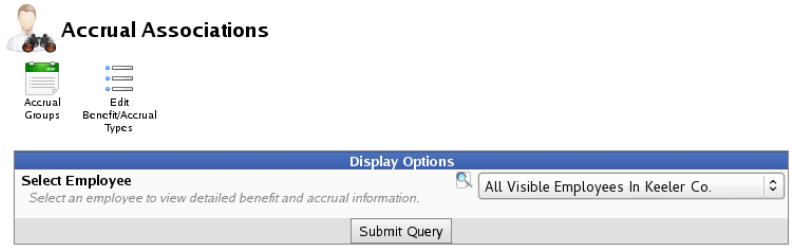
With the optional Advanced Benefits Tracking module (IPSBEN), the following features are added:

- Unlimited accrual groups
- Unlimited tenure levels
- Unlimited custom plus Vacation and Sick accrual types
- Flexible accrual periods
- Enhanced configuration options including caps and prorating

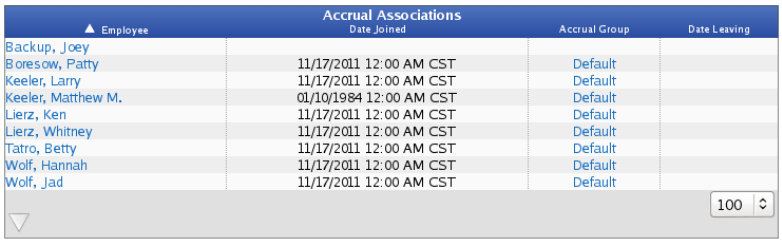
To View Current Group Associations

Click the **Accrual Group Association** icon

at the top of the page.



- **Select an Employee or Group** from the drop down list.
- Click the **Submit Query** button to view the report.



This report will show the date each employee joined his/her current accrual group, which accrual group he/she currently belongs to, and when (if ever) the employee is scheduled to leave that accrual group.

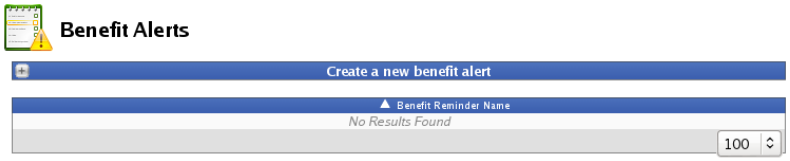
- An employee's complete accrual group membership history can be viewed by clicking that **Employee**'s name.
- Clicking on the name of the **Accrual Group** will open the Accrual Groups page to display the accrual settings for that group.

Benefit Alerts

Benefit Alerts can be used to let management know when employees have maxed out their accruals or use benefits to the point where their accrued level is below zero.

The Email Automation module (IPSEML) is required.

Using the left pane Main Menu » Administration, click on: Benefits » Benefit Alerts

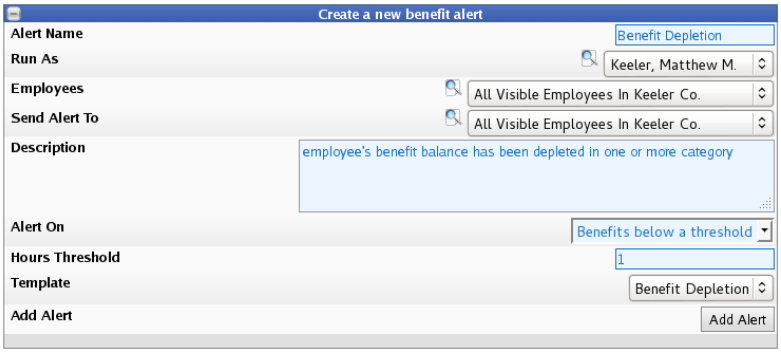


Create A New Benefit Alert

When creating a benefit alert, the employee that the alert will run as can be specified. Typically, you will select yourself, but there may be occasions when one employee may wish to create an alert on behalf of another. The lists containing the potential employees this alert applies to and to whom alerts should be sent will be based off the permissions of the *run as* employee.

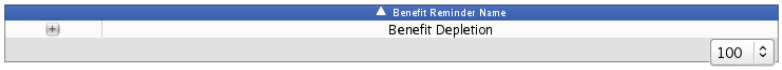
- Click the **+** (plus) sign to the far left of the **Create a new benefit alert** bar.

NOTE: If NO templates currently exist for employee benefits, go to System » E-Mail Templates to create a template.

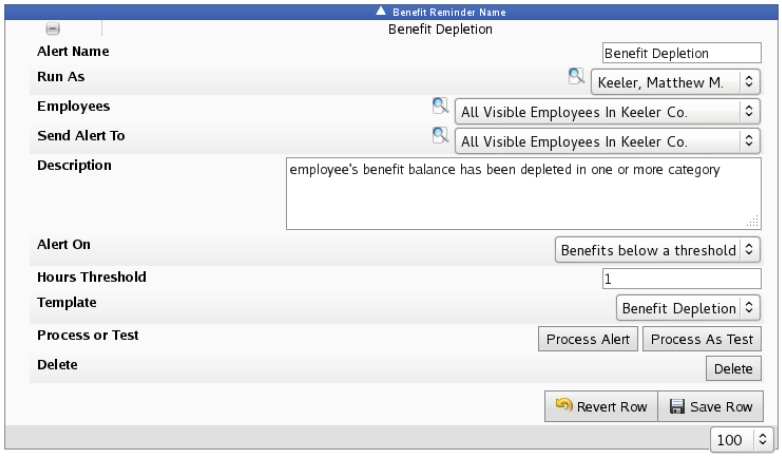


- Add a **Name** to the benefit alerts event.
- Choose which employee these benefit alerts **Run As**. Typically, you will specify yourself unless there is a special need otherwise.
- Choose the **Employees** this benefit alert applies to.
- Choose the employees list this benefit alert are **Sent To**.
- Add a detailed **description**of the alert.
- **Alert On**: Choose which type of event will trigger an alert.
- **Hours Threshold**: Enter the number of hours used for threshold alerts.
- Choose an email **Template** to use when sending out notifications.
- Click the **Add Alert** button to save. The Alert will then appear in the **Benefit Reminder** list below.

To Edit, Process, Test, or Delete



- Click the **+** (plus) sign to the far left of the **Benefit Reminder Name**.



- Make any neccessary changes then click the **Save Row** button.
- **Process or Test**: You can force the alerts to run now by pressing **Process Alert** button or you can generate a test email to review by clicking the **Process As Test** button.
- To delete this alert, click the **Delete** button.

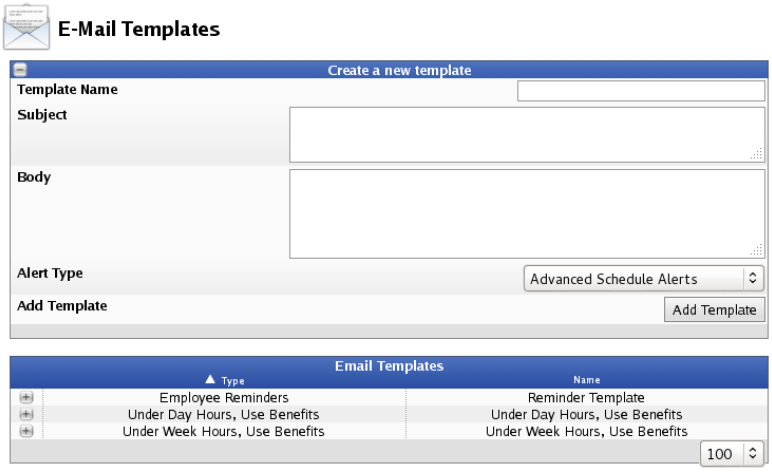
Note: All alerts aggregate information for all employees the alert applies to. Therefore, if your employee selection includes 1,000 employees, only one email will be sent to each recipient. There will not be 1,000 individual emails generated per recipient.

See Also:
E-Mail Templates

E-Mail Templates

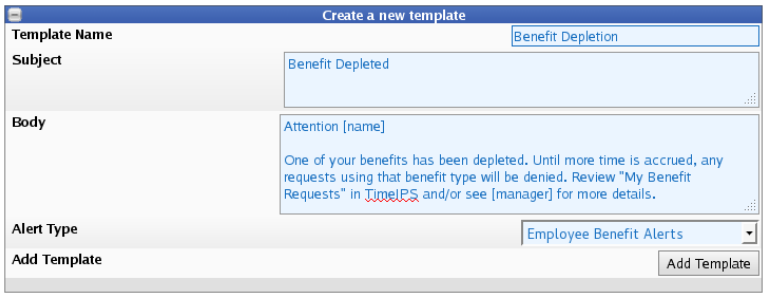
E-Mail Templates can be used with the IPSEML and/or IPSAPP module to customize the messages that are sent in a number of common situations.

Using the left pane Main Menu » Administration, click on: System » E-Mail Templates



Email templates provide an easy method of standardizing the format of information that will be provided by the system in a number of places. For example, a template can be created which will be used whenever an employee reminder is generated. The email body can include special tags that will be expanded during the processing period.

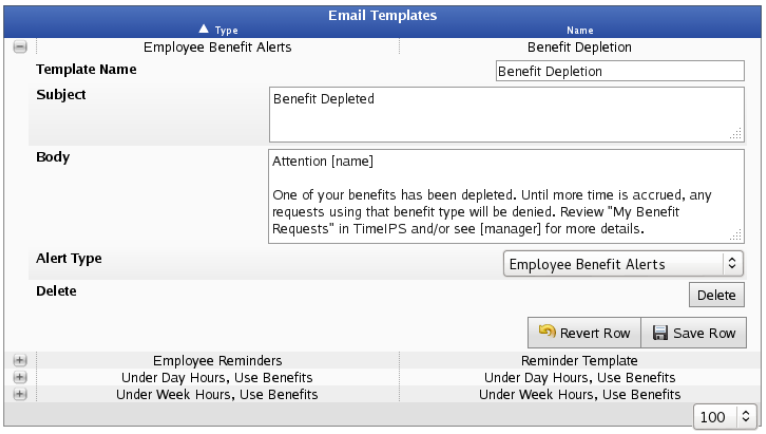
Create a New Template



- Add a descriptive **Name** to be used to reference this particular template.
- Add a **Subject** line to be used when sending emails with this template.
- Along with the message, basic template tags can be included in the **Body** which will be populated with the specific informatoin as needed.
  For Example, the following tags are available for Employee Benefit Alerts.
  [badge] -- The employee's badge number
  [orgUnit] -- The employee's organizational unit's name
  [manager] -- The employee's manager name
  [name] -- The employee's name
  [stock] -- The original default message
  [stock-subject] -- The original default subject

  The tag will be replaced by the actual information when the email is generated. So [name] is replaced with the employee's name. Attention [name] may read "Attention Joe" instead.
- Select a **Type** of alert this template is being created for.
- Click the **Add Template** button to save.

Edit or Delete a Template



- Click the **+** (plus) sign to the left of the Alert Type to expand the **Email Templates** window.
- Make any neccessary changes and then click the **Save Row** button.
- To delete this template, click the **Delete** button.

NOTE: When attempting to delete a template, you may find that the system will not allow it. This is because a system reminder is relying on this template to exist. If you really want to delete this template, you must find each of these reminder options and switch those templates to a different one before deletion can occur.

Importing/Exporting Benefits

TimeIPS can export benefit data to a spreadsheet file. The data can then optionally be edited and imported back into the system, using the Employee Import/Export optional module.

Using the left pane Main Menu » Administration, click on: Benefits » Import/Export

Exporting

- From the **Export Targets** drop down list, select the Employee or group to be included in the export.
- Select either a Horizontal or Verical **Format** from the Export drop down list, then click the **Export Data** button to export the current benefits information for the employee(s) selected.

Employee	Badge Number	Benefit Type	Available	Effective
Backup, Joey	1008	Sick	0	
Backup, Joey	1008	Vacation	0	
Backup, Joey	1008	FMLA	0	
Boresow, Patty	1005	Sick	229.17	
Boresow, Patty	1005	Vacation	93.33	
Boresow, Patty	1005	FMLA	0	
Keeler, Larry	1003	Sick	227.17	
Keeler, Larry	1003	Vacation	107.33	
Keeler, Larry	1003	FMLA	0	
Keeler, Matthew M.	1000	Sick	250	
Keeler, Matthew M.	1000	Vacation	42.13	
Keeler, Matthew M.	1000	FMLA	0	
Lierz, Ken	1004	Sick	232.17	
Lierz, Ken	1004	Vacation	87.33	
Lierz, Ken	1004	FMLA	0	
Lierz, Whitney	1001	Sick	232.17	
Lierz, Whitney	1001	Vacation	107.33	
Lierz, Whitney	1001	FMLA	0	
Tatro, Betty	1002	Sick	232.17	
Tatro, Betty	1002	Vacation	107.33	
Tatro, Betty	1002	FMLA	0	
Wolf, Hannah	1007	Sick	232.17	
Wolf, Hannah	1007	Vacation	107.33	
Wolf, Hannah	1007	FMLA	0	
Wolf, Jad	1006	Sick	232.17	
Wolf, Jad	1006	Vacation	107.33	
Wolf, Jad	1006	FMLA	0	

The report contains each employee's name, start date, tenure, and hours worked, as well as the available, earned, used, and lost hours for each benefit type. This file may be modified and imported using the "Benefits Import/Update" section of the page.

TIP: To edit a .csv file, we recommend a spreadsheet application such as Excel™ or OpenOffice.org Calc.

Importing

You may use an exported Benefits file to enter your Benefits information or use the Benefits Import File Layout to create your own file. The following must be met:

- The file must be a **comma separated value (CSV) file**. (i.e. Excel worksheet, OpenOffice Spreadsheet, or ASCII Comma Delimited)
- The **field names** (column names) must be exact. You may delete unneeded columns. The first column must be "Employee". If you have multiple employees with the same name, use a "Badge Number" column as the unqiue identifier for employees on the import. (If present, the "Badge Number" field will be given priority over the "Employee" field to identify the employee on the row.) The remaining columns may be in any order. Column names are not case sensitive and ignore extra spaces.

To identify an employee on import, the system looks for three fields in order:

1. "SSN" field. If present, the SSN will be given first priority in identifying the employee for the benefit import. This is not on the export for security reasons, but can be added to the import to

ensure the correct identification of an employee when multiple employees have identical names.
2. "Badge Number" field. If present, the Badge Number will be given the next priority in identifying the employee for the import.
3. "Employee" field. If SSN and Badge Number are blank or match no employees, then the name will be used to try to identify the employee for the import. TimeIPS will attempt to match the Employee's last name and first name exactly and middle name if specified.

If the employee cannot be identified, an error will be shown.

IMPORTANT: Even if identifying employees by SSN or Badge Number, the "Employee" column must be the first column in order for the file to be recognized as a valid benefits import (or IAPI transaction).

All the other columns on the export, such as worked hours, total used, lost, etc. are optional, only informational and are not used by TimeIPS when importing.

When importing benefit levels, only the "Available" columns (for example, "Sick Available" and "Vacation Available") are used. For each "Available" column, a corresponding "Effective" column must also be filled with a date (for example 10/1/2009) that tells TimeIPS when the new benefit total becomes effective. The Available and Effective pair is equivalent to a Benefit Reset option, meaning that you have created a set-point where accruals will begin at the level specified on the date effective and calculate forward from that point.

- On systems with **IPSBEN**, additional benefit types will be exported/imported in sets of columns similar to Sick and Vacation

Import/Update

1. Select either a Horizontal or Verical **Format** from the Benefits Import/Update File drop down list.
2. Click the **Browse** buttonand select the .csv file with new or updated benefits data.
3. Click the **Import/Update Benefits** button.
4. **Excel™ Compatibility**: If you are using Microsoft Excel™ to modify the import file and you receive errors about "incorrect number of columns," enable this option by checking the box.

NOTE: The Import/Update Feature will log all changes to benefit levels as if the changes were made on the benefits page by the administrator running the import.

ADP Accrual Export

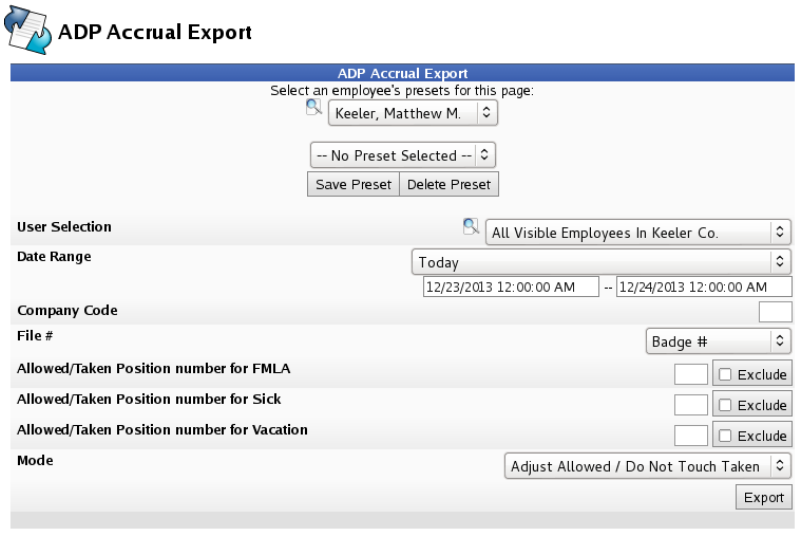
The ADP accrual export functionality allows one to track benefit information in the TimeIPS system while still easily keeping one's ADP information accurate and up-to-date.

There are three modes for this export -- Replace Allowed / Set Taken to 0, Replace Allowed / Do Not Touch Taken, and Adjust Allowed / Do Not Touch Taken. When exporting using either of the Replace Allowed modes, only an ending date need be specified; otherwise, a date range will need to be supplied. Any mode will generate a total number of hours earned for each benefit type to be included.

Using the left pane Main Menu » Administration, click on: Benefits » Import/Export

Click on the **ADP Export** icon

at the top of the page.



- Optionally, **Select an employee's presets for this page**. Select the employee from the drop down list. From the next drop down list, select that employee's preset.

  NOTE: A new preset can also be added by clicking the "Save Preset" button and saved as the default by clicking the "Make Default" button.

- From the **User Selection** drop down list, select the Employee or group to be included in the export.
- **Date Range**: Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", This Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the date/time from and to fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so

just click in the box and type over the displayed date and time.

- **Company Code**: Maps to the Co Code field.
- **File #**: The field used to identify employees by either Badge #, Alternate Number, or SSN.
- **Allowed/Taken Position number for** (each benefit): Maps to the Allowed/Taken Position field for each benefit. To exclude this option, check 'Exclude'
- **Mode**: The Allowed Adjustment Type ADP uses to determine how to handle the benefit hours in the export.
- Click on the **Export** button.

Co Code	File #	Allowed/Taken Position Number	Allowed Adjustment Type	Allowed Adjustment Amt
505	1000	1	3	0
505	1000	2	3	2.13
505	1001	1	3	2.13
505	1001	2	3	2.13
505	1002	1	3	2.13
505	1002	2	3	2.13
505	1003	1	3	2.13
505	1003	2	3	2.13
505	1004	1	3	2.13
505	1004	2	3	2.13
505	1005	1	3	2.13
505	1005	2	3	2.13
505	1006	1	3	2.13
505	1006	2	3	2.13
505	1007	1	3	2.13
505	1007	2	3	2.13
505	1008	1	3	0
505	1008	2	3	0

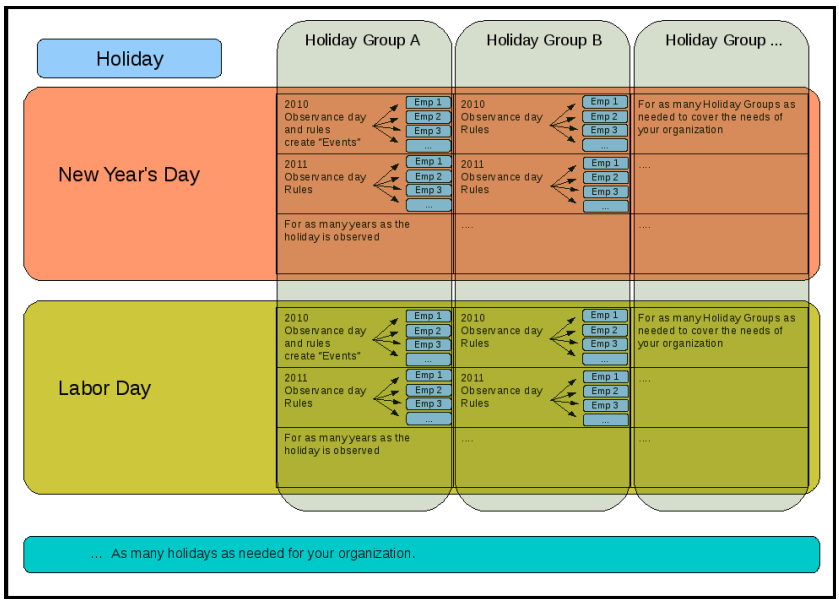
Holidays

The TimeIPS Holidays feature automatically allocates paid holiday hours. The Payroll Integration with Benefits Tracking module is required.

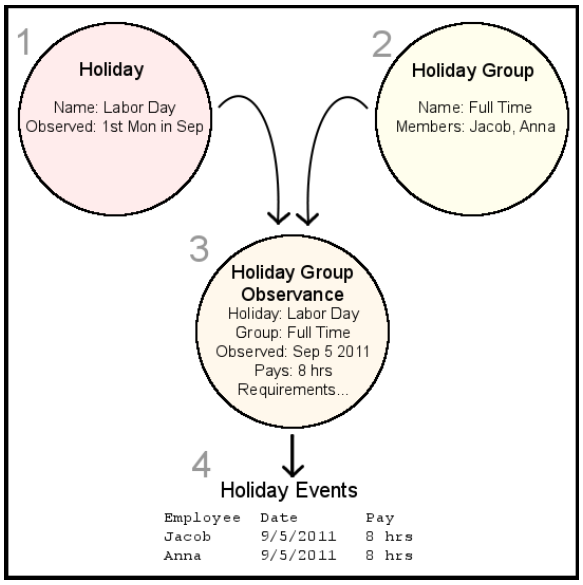
Summary:

- Holidays are created and are scheduled to be generally observed on a certain date (July 4th) or observed by rule (4th Thursday in November).
- Employees are assigned to Holiday Groups.
- Holiday Groups are assigned specific observances of Holidays.
- The holiday group observances are configured to define how an employee in the group qualifies for the holiday and how the holiday is paid.
- Individual holiday hours (called holiday events) can be reviewed on a per-employee basis and modified if needed

The automated holiday process is explained in the following diagram.



Each Holiday Group is connected to Holidays by Holiday Group Observances. The Holiday Group Observance defines the date of observance, payment parameters, and requirements to earn the holiday. The system uses that information to create Holiday Events which are the actual hours paid to the employee. The interaction of Holidays, Holiday Groups, and Holiday Group Observances to create Holiday events is also shown in the following diagram.



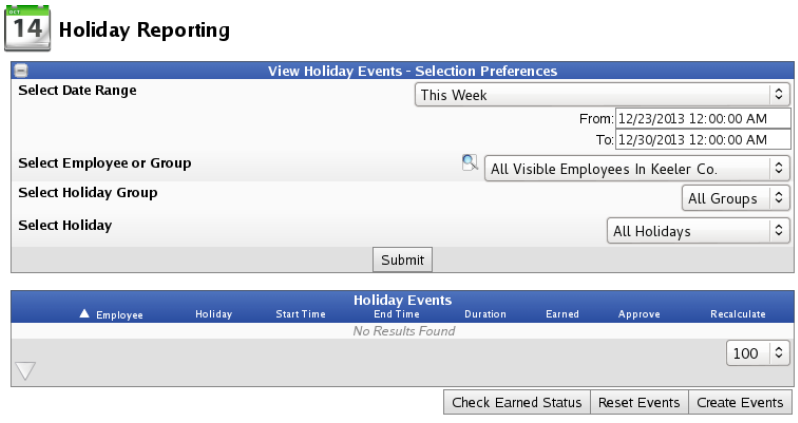
1. We define a holiday called Labor Day which occurs on the first Monday of September.
2. We have a holiday group called "Full Time" which has two members: Jacob and Anna.
3. We create a Holiday Group Observance for the Full Time group for Labor Day for 2011. We define that this observance will pay 8 hours and might also have additional requirements such as that the employee work the adjacent day before or after the holiday.
4. After the Holiday has passed the system automatically creates individual Holiday Events for each member of the holiday group. The earned/unearned status and hours paid can be edited on an individual basis.

Holiday Reporting

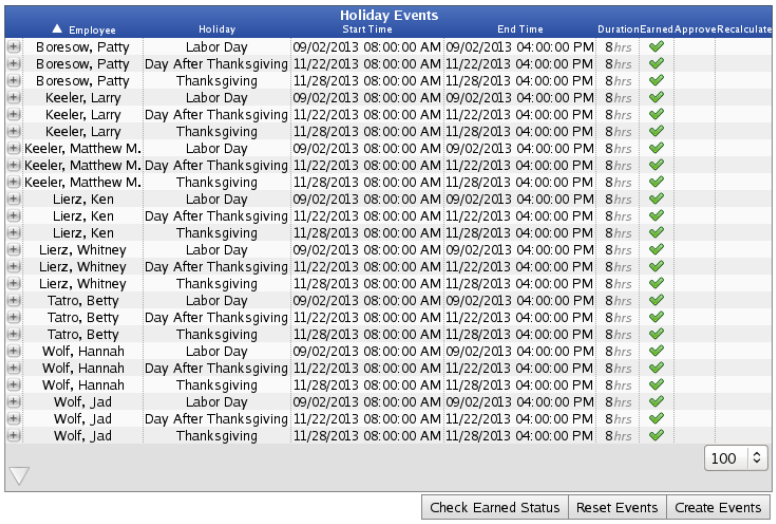
TimeIPS Holiday Reporting provides a way to view and modify holiday events.

Holiday Events (The Holiday applied to individual employees): "Holiday Events" can be viewed under "Holiday Reporting" and refer to the actual grant of holidays to employees. To handle special cases not covered by the Holiday Groups and Holiday Observances, TimeIPS allows editing a number of essential details of each holiday for each employee. The holiday for each employee can be "Approved," meaning that the employee will get it even if not earned by the rules, or "Unapproved," meaning that the employee will not get it even if earned by the rules.

Using the left pane Main Menu » Administration, click on: Holidays » Reporting



- **Select Date Range**: Choose either a predefined or custom time range in which to run the report.
  - Use the drop down menu to select a **predefined range**, such as "This week", This Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the date/time from and to fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- From the drop down list, **Select an Employee or Group** to be included in the report.
- **Select a Holiday Group** from the drop down list to limit the results of the search.
- **Select a Holiday** from the drop down list to limit the results of the search.
- Click the **Submit** button to run the search. The results will appear in the **Holiday Events** table below.



Holiday Events

Employee	Holiday	Start Time	End Time	Duration	Earned	Approve	Recalculate
Boresow, Patty	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Boresow, Patty	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Boresow, Patty	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		
Keeler, Larry	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Keeler, Larry	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Keeler, Larry	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		
Keeler, Matthew M.	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Keeler, Matthew M.	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Keeler, Matthew M.	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		
Lierz, Ken	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Lierz, Ken	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Lierz, Ken	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		
Lierz, Whitney	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Lierz, Whitney	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Lierz, Whitney	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		
Tatro, Betty	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Tatro, Betty	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Tatro, Betty	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		
Wolf, Hannah	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Wolf, Hannah	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Wolf, Hannah	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		
Wolf, Jad	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	8 hrs	✔		
Wolf, Jad	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	8 hrs	✔		
Wolf, Jad	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	8 hrs	✔		

100

Check Earned Status | Reset Events | Create Events

The buttons provided under the Holiday Events table can be used to force certain calculation actions to happen immediately.

- **Check Earned Status**: Clicking this button will force the Holiday System to immediately process all events to determine earned status. By default, these calculations are only run after the observance period for a holiday event has expired.
- **Reset Events**: Clicking this button will reset the earned, approval, and pay information for all events being displayed.
- **Create Events**: Clicking this button will force the Holiday System to create any missing events for the current employee, holiday, or holiday group. These are generated based on rules configured in the Advanced Holiday Administration page. By default, the system only creates holiday events for observances in the coming month. Clicking this button will force the creation of events for all currently configured observances.

- Click the **+** (plus) sign to the left of the Employee's name to expand more options.
- **Allow Automatic Changes**: To maintain automatic holiday rules, check the **Enable** box so this holiday event can be changed automatically by the system. Unchecking the box disables this option and therefore allows for manual changes.

  WARNING: Re-enabling the option runs the risk of your changes being overwritten by the system.

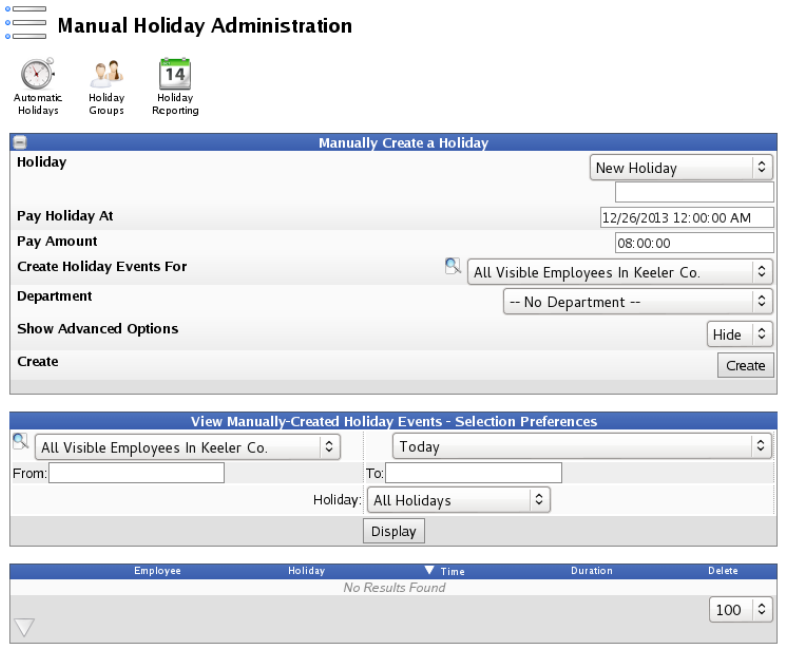
- Click the **Save Row** button to implement changes.

Manual Holidays

Manual Holidays provide a way to quickly create one-time holidays for one or more employees.

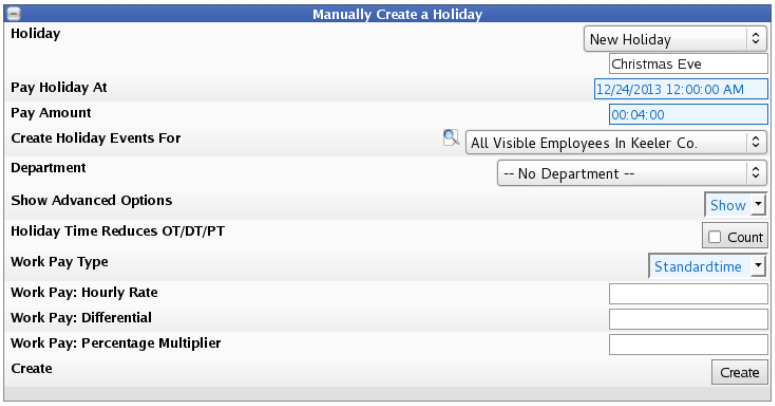
NOTE: They are not part of the Automatic Holiday Engine. If you want to configure a holiday to be applied yearly, use "Automatic Holidays" instead.

Using the left pane Main Menu » Administration, click on: Holidays » Manual Holidays



Create a Manual Holiday

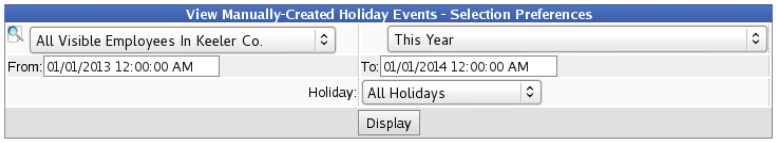
- Select the **Holiday** you want to create entries for. If the holiday you want does not yet exist, choose "New Holiday" and type a name into the field provided.
- **Pay Holiday At**: Select the time and date you want the created events to be observed.
- **Pay Amount**: Enter the number of hours you want the created events to be paid for.
- Select the Employee of Employee Group that you want to **Create** these **Holiday Events For**.
- Select the **Department** that this Holiday Event should be tracked against.
- Choose wheither to Hide or **Show Advanced Options**. Choosing "Show" will display the following advanced options.



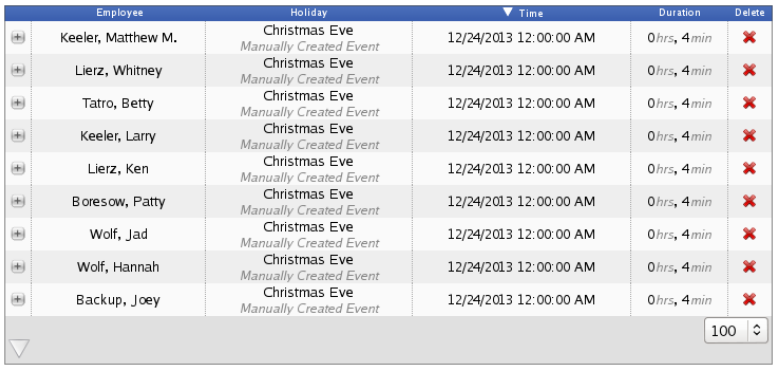
  - **Holiday Time Reduces OT/DT/PT**: Check this box if you want the holiday paid duration to count towards overtime calculations as if it was worked time.
  - **Work Pay Type**: Select "Over Time" if, in accordance with Canada Labour Code, Part III, 202 (1) as of Jan. 1, 2007, employees following this Overtime Policy should have all hours worked on the same calendar day as a holiday treated as overtime. Select "Double Time" if all hours worked during the holiday should be treated as doubletime. Note: If time on holiday qualifies for a higher paytype because of other rules, it will be promoted. If time on the holiday has a per-job or per-event setting, this value will be overridden. (More Information)
  - **Work Pay: Hourly Rate**: For work done in the Observed Range, pay this hourly rate.
  - **Work Pay: Differential**: For work done in the Observed Range, add this differential to the hourly rate.
  - **Work Pay: Percentage Multiplier**: For work done in the Observed Range, multiply hourly pay by this percentage.
- Click on the **Create** button to impletment the holiday event.

View Manual Holidays

From the "View Manually-Created Holiday Events - Selection Preferences" section...

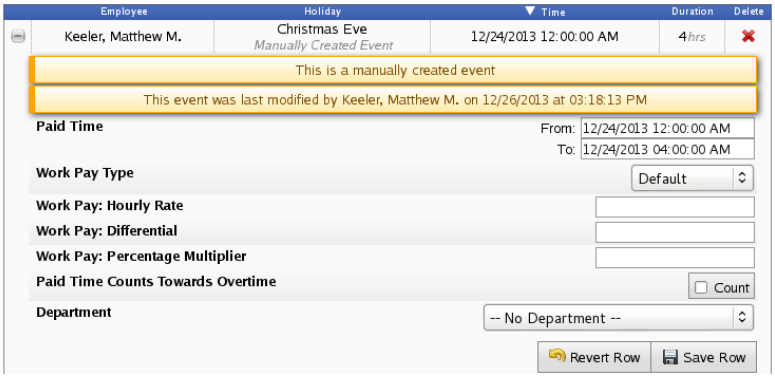


- Select the **Employee** of Employee Group that you want to view holiday events for.
- Choose either a predefined or custom **time range** in which to view the events.
  - Use the drop down menu to select a **predefined range**, such as "This week", This Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the date/time **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- Select the **Holiday** (or All Holidays) to view.
- Click the **Display** button to view the list below.



Edit or Delete Manual Holidays

- Once the Holiday Events are viewable in the table above, click the **+** (plus) sign to the left of the **Employee**'s name to expand the window.



- Here you can make changes to the **Paid Time**, **Work Pay Type**, **Hourly Rate**, **Differential**, **Percentage Multiplier**, whether **Paid Time Counts Towards Overtime**, and the **Department.**
- Click the **Save Row** button to save the changes.
- Click the red **X** to **delete** the event for individual employees.

Automatic Holidays

TimeIPS Automatic Holidays provide a way to quickly create recurring holidays.

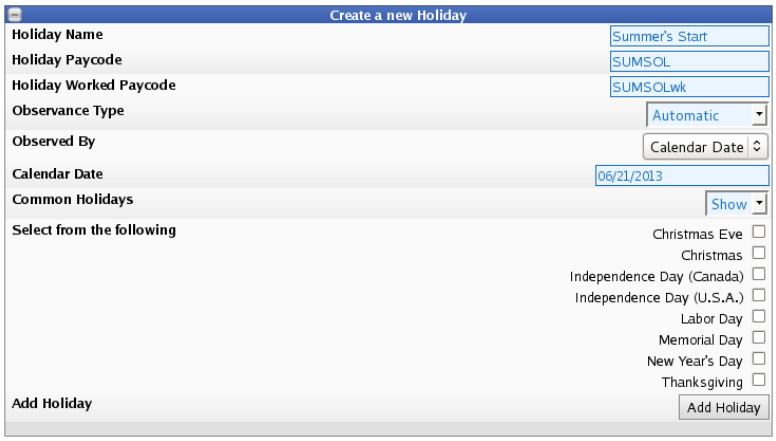
Using the left pane Main Menu » Administration, click on: Holidays » Automatic Holidays

On a new system with no previous configuration, you will be presented with the following screen.

Clicking the link will take you to the Holiday Group Administration page, where a default group can be configured for your review. (See the **Holiday Groups** article for instructions.)

CREATE A NEW HOLIDAY

- Click the **+** (plus) sign on the far left to expand the "Create a new Holiday" panel.



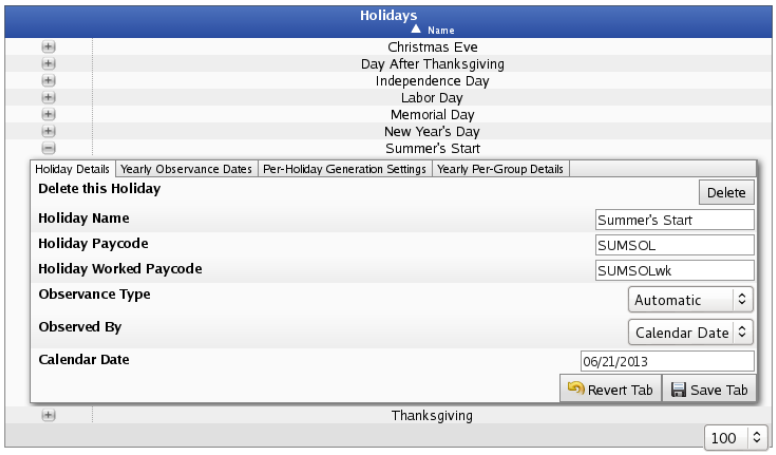
- Fill in the information as prompted.
  - **Holiday Name:** The name of this holiday.
  - **Holiday Paycode:** A custom code that can be used for identifying payroll events for this holiday.
  - **Holiday Worked Paycode:** A custom code that can be used for identifying worked time payroll events for this holiday.
  - **Observance Type:** An "Automatic" holiday will follow the holiday's generation settings to automatically generate the holiday events each year. The "Not Automatic" holidays can be used for Manual holidays that should not automatically be created.
    Select **Automatic** if this holiday is observed by everyone on the same day.
    Select **Not Automatic** if this holiday happens at a different date for each employee.
  - **Observed By:** How the Holiday Rules should determine the day this holiday is observed. You can always change the actual day that this holiday occurs on for any given year by modifying its entry in the **Observance List** below.
    Select **Calendar Date** to simply set a specific month and day for this holiday, like "Jan 1st."
    Select **Observed Rule** to set a rule, like "The fourth Thursday of November."
  - **Calendar Date:** The exact calendar date of the year that this holiday is observed.
    Note: the selector allows for changing the year, but only the month and day are saved.
  - **Common Holidays:** Select 'show' to see a list of common holiday observances.
- Click the **Add Holiday** button.

VIEW & EDIT HOLIDAYS

Once you have created a holiday, you can manage it's information and observances from the **Holidays** table.

- Click the **+** (plus) sign to the left of the **Holiday Name** to expand the window.

Holiday Details tab

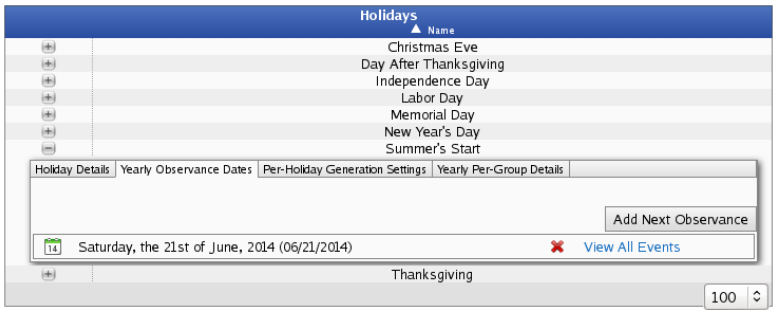


- From the Holiday Details tab, you can **edit** the original information used to set up the Holiday. For a description of each, see the "Create a New Holiday" section above.
- Be sure to click the **Save Tab** button after making changes.
- Holidays can also be deleted here by clicking the **Delete** button.

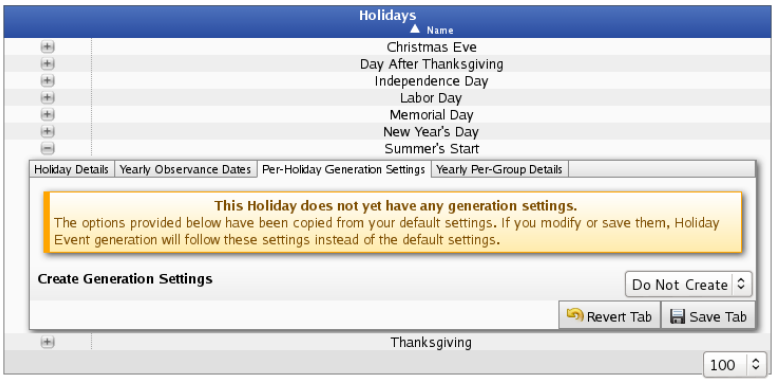
Yearly Observance Dates tab

The observance dates listed on this tab are the standard dates for each year for this holiday. These dates are generated based on the rules set on the Holiday Details tab. Each Yearly Per-Group observance will be based on these dates. Normally all past years and one future year will be listed. You can force the creation of additional future years by clicking **Add Next Observance.**

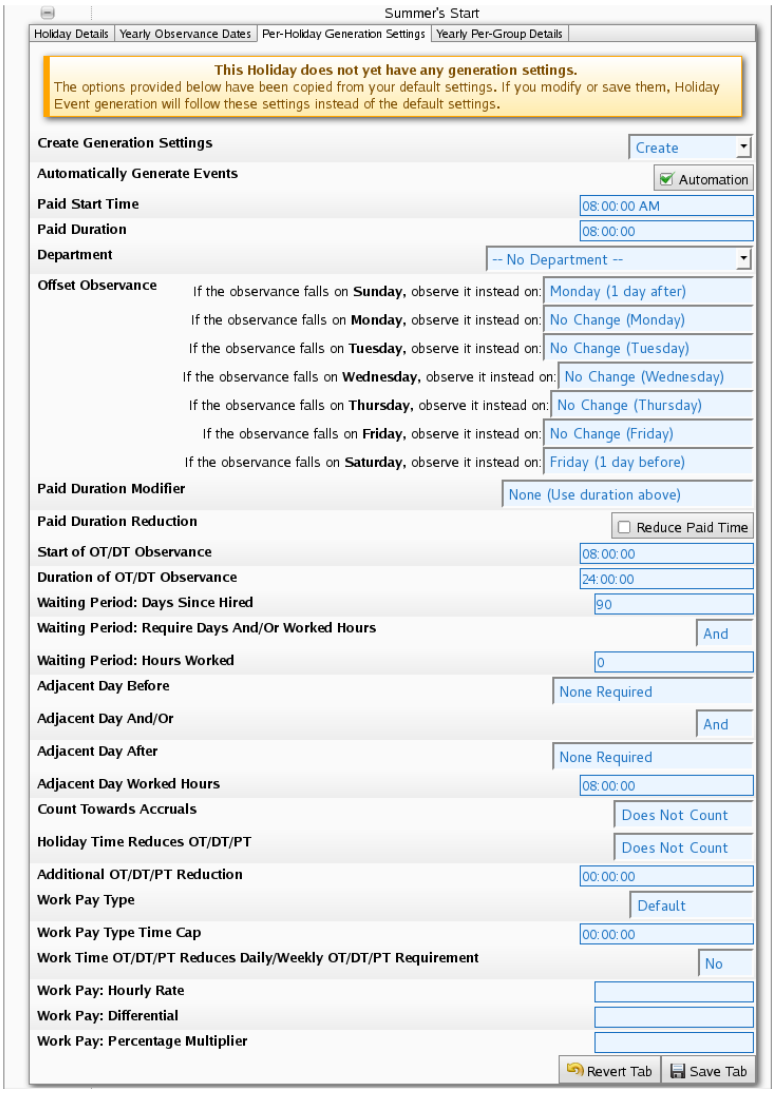
Observance dates can be edited for each year to fit your needs. These can be calculated into the future as needed. If you don't pre-calculate them, they'll be added automatically as the next year's holiday date approaches.If changes are made to these dates, and Yearly Per-Group Observances already exist, you will be prompted to automatically update them, provided the date doesn't occur in a payrolled time period, or the date isn't moved into a payrolled time period.



Per-Holiday Generation Settings tab



Create Generation Settings: To create specific settings, set this option to "Create" and fill out the settings form.



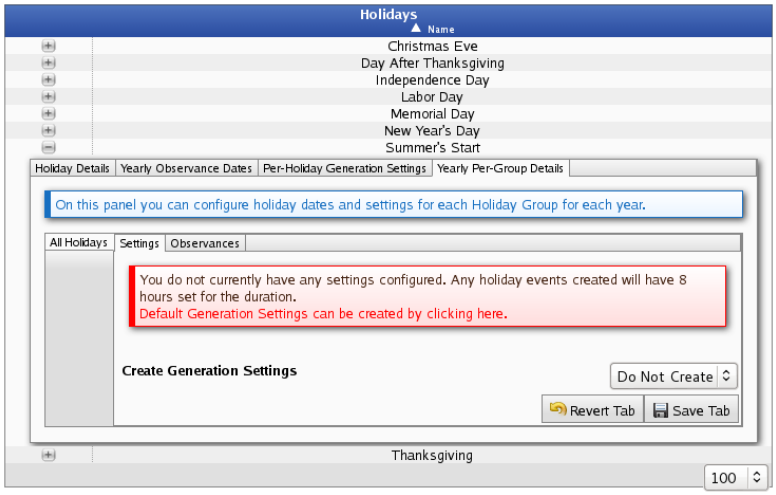
- If **Automatically Generate Events** is checked, the Holiday Engine will automatically create future observances and events without the need for any human interaction.
- **Paid Start Time**: The time of day during the Holiday that it will be observed and paid. This is set to 8:00 AM by default.
- **Paid Duration**: The duration of time the holiday event will pay. This is set to 8 hours by default.
- **Department**: Select the department that Holiday Events generated by these settings should be tracked against.
- **Offset Observance**: When an automatically generated holiday falls on a sepcified day of the week, you can configure TimeIPS to observe that holiday, instead, up to six days before or after that chosen day. For example, if Christmas Eve falls on a Saturday and Christmas Day falls on a Sunday, you can configure TimeIPS to have Christmas Eve occur one day before (on Friday), and Christmas Day to occur one day after (on Monday).

- **Paid Duration Modifier**: This option modifies the selected holiday pay duration in one of four ways.
  - ***None:*** *The paid amount is not modified. Employees will receive the holiday pay duration set above.*
  - ***Prorate 40H vs Sch Weekly Hours:*** *Grants a percent of the holiday pay duration set above as a proportion of scheduled weekly hours to 40 hours. If an employee is scheduled for 30 hours of work and 8 hours of holiday pay is configured, the employee will receive 6 hours of holiday pay.*
  - ***In/Out Schedule Time:*** *Grants the employee the amount of time scheduled for the day* ***instead of*** *the holiday pay duration set above. If an employee is scheduled for 6 hours the day of a holiday and 8 hours of holiday pay is configured, the employee will receive 6 hours of holiday pay.*
  - ***Default Job Coverage:*** *Grants the employee the amount of time scheduled for their default job coverage on the scheduled day* ***instead of*** *the holiday pay duration set above.*
- **Paid Duration Reduction**: Enable this option to reduce the duration of holiday hours paid by the amount of time worked or benefits used during the holiday observance range.
- **Start of OT/DT Observance**: (Optional) Hours prior to holiday paid time to begin the holiday DT/OT observance.
- **Duration of OT/DT Observance**: (Optional) Duration of the holiday observance. Used for holidays that promote worked time to overtime or doubletime during a holiday.
- **Waiting Period: Days Since Hired**: The number of days since an employee was hired before qualifying for a holiday. This is set to 90 days by default.
- **Waiting Period: Require Days And/Or Worked Hours**: Employees can either meet one of the two Waiting Period requirements, or both of them. Set to "And" to require both, and set to "Or" if meeting either will allow an employee to qualify for the holiday.
- **Waiting Period: Hours Worked**: The number of hours worked since the employee was hired, before being able to qualify for a holiday.
- **Adjacent Day Before**: To qualify for a holiday, an employee may be required to work a valid day before. This can be the preceeding Calendar Day, to closest preceeding Scheduled Day, or the closest Weekday in the case of weekend holidays. If the previous day is configured as a Holiday and the employee did not work the required amount of hours on that day, the day preceeding it will be used, and so on.
- **Adjacent Day And/Or**: Set to "And" if the employee must satisfy both the day before rules and the day after rules. Set to "Or" if the employee may earn the holiday by satisfying either rule.
- **Adjacent Day After**: To qualify for a holiday, an employee may be required to work a valid day after. This can be the following Calendar Day, to closest following Scheduled Day, or the closest Weekday in the case of weekend holidays. If the following day is configured as a Holiday and the employee did not work the required amount of hours on that day, the day after it will be used, and so on.
- **Adjacent Day Worked Hours**: To qualify for a holiday, an employee must work this many hours on each configured adjacent day. If this is set to 0 hours, the Adjacent Day configurations will be ignored. This is set to 8 by default.
- **Count Towards Accruals**: Set to "Counts" if the Holiday Pay Hours time for this holiday should be used to count as worked time for benefit accrual calculations.
  Note: Holidays always count toward benefit tenure level calculations.
- **Holiday Time Reduces OT/DT/PT**: Select "Counts" if, in accordance with Canadian Labour Code, Part III, Division I, 169(3) as of Jan. 1 2007, employees getting this holiday should have "the hours of work of the employee in that week ... be reduced by the standard hours of work for each general holiday in that week." If holidays do not affect the hours an employee must work to get weekly overtime, choose "Does Not Count."
- **Additional OT/DT/PT Reduction**: In addition to or instead of the previous option to allow Holiday hours to reduce weekly Overtime requirements, holidays can also be configured with an additional arbitrary number of hours that are subtracted from each employee's weekly Overtime requirement. For example, if a holiday event is 8 hours long, the holiday event is set to reduce Overtime requirements, and this option is also set to 8 hours then the weekly Overtime requirement would be reduced by 16 hours from possibly 40 to 24.
- **Work Pay Type**: Select "Over Time" if, in accordance with Canada Labour Code, Part III, 202 (1) as of Jan. 1, 2007, employees following this Overtime Policy should have all hours worked on the same calendar day as a holiday treated as overtime. Select "Double Time" if all hours worked during the holiday should be treated as doubletime. Note: If time on holiday qualifies for a higher paytype because of other rules, it will be promoted. If time on the holiday has a per-job or per-event setting, this value will be overridden.
- **Work Pay Type Time Cap**: If work pay type is not set to default then this option can limit the amount of time that is promoted to a different pay type.
- **Work Time OT/DT/PT Reduces Daily/Weekly OT/DT/PT Requirement**: Select "Yes" if, when employees work on holidays and the work pay type setting above is OT/DT/PT, the weekly hours required to reach OT/DT/PT should be reduced as well. For example, an employee works 40 hours in a week with 8 hours occurring during this holiday. With this option set to "No" the employee would not earn weekly overtime until 48 hours total (when the weekly ST hours worked during non-holiday periods reach 40). With this option set to "Yes" the employee would begin earning weekly overtime at 40 hours total (when weekly ST hours worked during non-holiday periods reach 32).

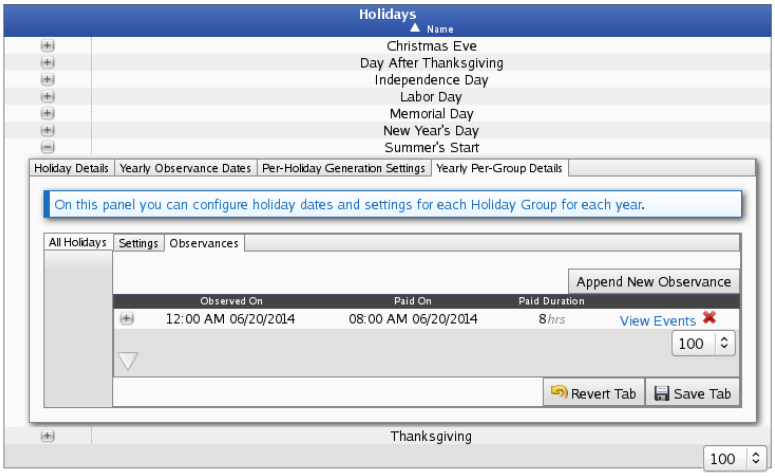
  Unless the option for Work Pay Type is something other than Default this option is ignored.
- **Work Pay: Hourly Rate**: For work done in the Observed Range, pay this hourly rate.
- **Work Pay: Differential**: For work done in the Observed Range, add this differential to the hourly rate.
- **Work Pay: Percentage Multiplier**: For work done in the Observed Range, multiply hourly pay by this percentage.

Yearly Per-Group Details tab

If you have not yet set up and automated generation settings, the **Yearly Per-Group Details** tab » **Settings** will display with a warning: "You do not currently have any settings configured. Any holiday events created will have 8 hours set for the duration." Creating specific settings is optional, and not required for automatic holiday generation to work.



Observances



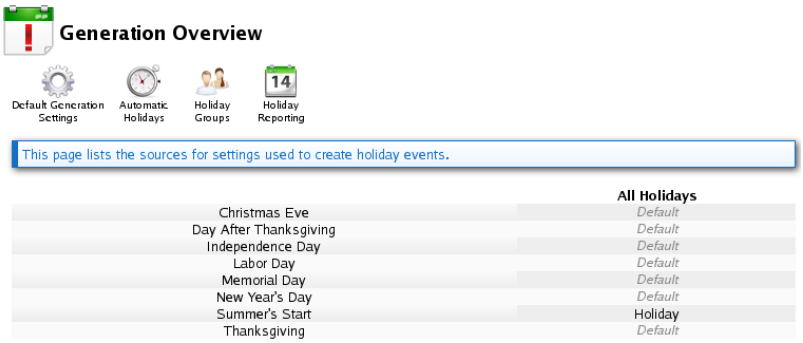
- Clicking **Append New Observance** will automatically create the next observance for this group.
- The details for each observance can be managed individually by clicking on the **+** (plus) sign to expand the window.
- Be sure to click the **Save Tab** button after making changes.
- To **delete** an individual observance, click the red **X** to the right of it.

Generation Overview

TimeIPS Holiday Generation Overview shows the settings for all holidays and all groups..

Using the left pane Main Menu » Administration, click on: Holidays » Generation Overview

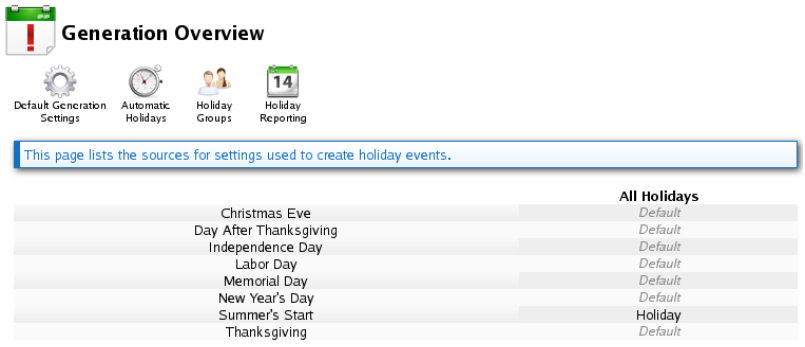
The Overview page presents a matrix crossing each Holiday with each Holiday Group. The cells contain the source of the settings that the Holiday Engine uses to determine the settings of new automatically generated Holiday Events.



Default Generation Settings

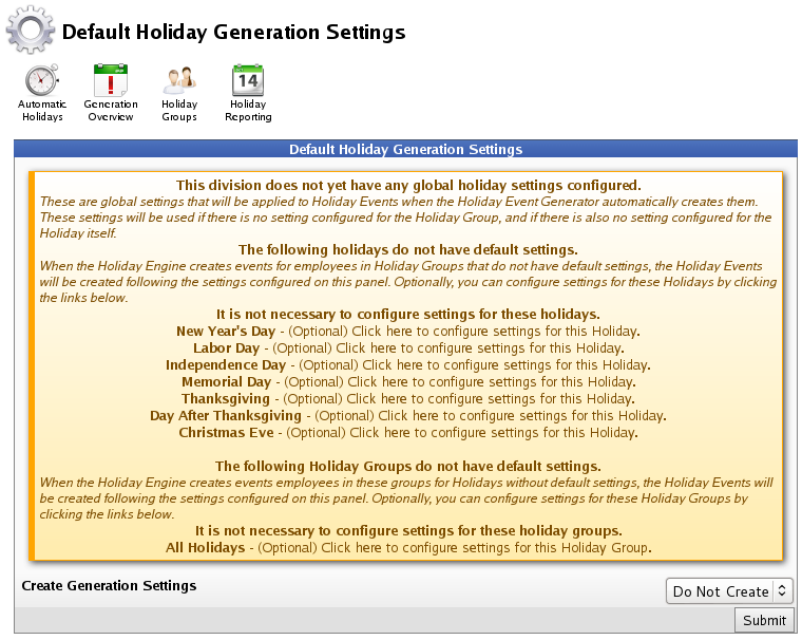
TimeIPS Default Holiday Settings provide a way to configure how new holidays will be created. If there are no settings configured for a Group or a Holiday, the Automatic Holiday Engine will use the Default Holiday Settings instead to create new Holiday Events.

Using the left pane Main Menu » Administration, click on: Holidays » Generation Overview

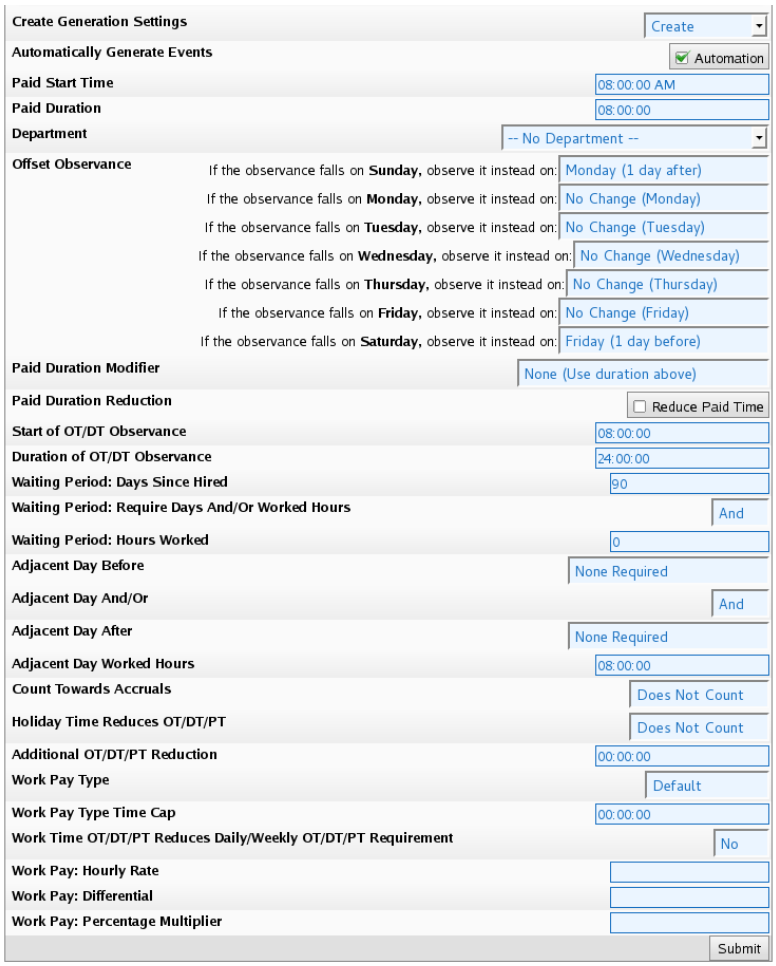


Click on the Default Generation Settings icon

at the top of the page.



- Optionally, to confgure settings for a specific Holiday or Group, click on the corresponding link in the yellow box above.
- To configure default settings, choose "Create" from the **Create Generation Settings** drop down list.



- If **Automatically Generate Events** is checked, the Holiday Engine will automatically create future observances and events without the need for any human interaction.
- **Paid Start Time**: The time of day during the Holiday that it will be observed and paid. This is set to 8:00 AM by default.
- **Paid Duration**: The duration of time the holiday event will pay. This is set to 8 hours by default
- **Department**: Select the department that Holiday Events generated by these settings should be tracked against.
- **Offset Observance**: When an automatically generated holiday falls on a sepcified day of the week, you can configure TimeIPS to observe that holiday, instead, up to six days before or after that chosen day. For example, if Christmas Eve falls on a Saturday and Christmas Day falls on a Sunday, you can configure TimeIPS to have Christmas Eve occur one day before (on Friday), and Christmas Day to occur one day after (on Monday).
- **Paid Duration Modifier**: This option modifies the selected holiday pay duration in one of four ways.
  - ***None:*** *The paid amount is not modified. Employees will receive the holiday pay duration set above.*
  - ***Prorate 40H vs Sch Weekly Hours:*** *Grants a percent of the holiday pay duration set above as a proportion of scheduled weekly hours to 40 hours. If an employee is scheduled for 30 hours of work and 8 hours of holiday pay is configured, the employee will receive 6 hours of holiday pay.*
  - ***In/Out Schedule Time:*** *Grants the employee the amount of time scheduled for the day* ***instead of*** *the holiday pay duration set above. If an employee is scheduled for 6 hours the day of a holiday and 8 hours of holiday pay is configured, the employee will receive 6 hours of holiday pay.*
  - ***Default Job Coverage:*** *Grants the employee the amount of time scheduled for their default job coverage on the scheduled day* ***instead of*** *the holiday pay duration set above.*
- **Paid Duration Reduction**: Enable this option to reduce the duration of holiday hours paid by the amount of time worked or benefits used during the holiday observance range.
- **Start of OT/DT Observance**: (Optional) Hours prior to holiday paid time to begin the holiday DT/OT observance.
- **Duration of OT/DT Observance**: (Optional) Duration of the holiday observance. Used for holidays that promote worked time to overtime or doubletime during a holiday.
- **Waiting Period: Days Since Hired**: The number of days since an employee was hired before qualifying for a holiday. This is set to 90 days by default.
- **Waiting Period: Require Days And/Or Worked Hours**: Employees can either meet one of the two Waiting Period requirements, or both of them. Set to "And" to require both, and set to "Or" if meeting either will allow an employee to qualify for the holiday.
- **Waiting Period: Hours Worked**: The number of hours worked since the employee was hired, before being able to qualify for a holiday.
- **Adjacent Day Before**: To qualify for a holiday, an employee may be required to work a valid day before. This can be the preceeding Calendar Day, to closest preceeding Scheduled Day, or the closest Weekday in the case of weekend holidays. If the previous day is configured as a Holiday, the day preceeding it will be used, and so on.
- **Adjacent Day And/Or**: Set to "And" if the employee must satisfy both the day before rules and the day after rules. Set to "Or" if the employee may earn the holiday by satisfying either rule.
- **Adjacent Day After**: To qualify for a holiday, an employee may be required to work a valid day after. This can be the following Calendar Day, to closest following Scheduled Day, or the closest Weekday in the case of weekend holidays. If the following day is configured as a Holiday, the day after it will be used, and so on.
- **Adjacent Day Worked Hours**: To qualify for a holiday, an employee must work this many hours on each configured adjacent day. If this is set to 0 hours, the Adjacent Day configurations will be ignored. This is set to 8 by default.
- **Count Towards Accruals**: Set to "Counts" if the Holiday Pay Hours time for this holiday should be used to count as worked time for benefit accrual calculations.
  Note: Holidays always count toward benefit tenure level calculations.
- **Holiday Time Reduces OT/DT/PT**: Select "Counts" if, in accordance with Canadian Labour Code, Part III, Division I, 169(3) as of Jan. 1 2007, employees getting this holiday should have "the hours of work of the employee in that week ... be reduced by the standard hours of work for each general holiday in that week." If holidays do not affect the hours an employee must work to get weekly overtime, choose "Does Not Count."

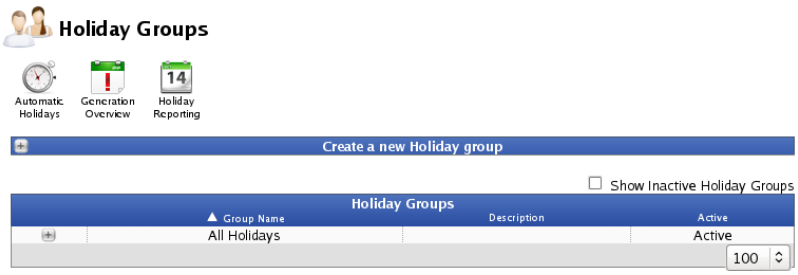
- **Additional OT/DT/PT Reduction**: In addition to or instead of the previous option to allow Holiday hours to reduce weekly Overtime requirements, holidays can also be configured with an additional arbitrary number of hours that are subtracted from each employee's weekly Overtime requirement. For example, if a holiday event is 8 hours long, the holiday event is set to reduce Overtime requirements, and this option is also set to 8 hours then the weekly Overtime requirement would be reduced by 16 hours from possibly 40 to 24.
- **Work Pay Type**: Select "Over Time" if, in accordance with Canada Labour Code, Part III, 202 (1) as of Jan. 1, 2007, employees following this Overtime Policy should have all hours worked on the same calendar day as a holiday treated as overtime. Select "Double Time" if all hours worked during the holiday should be treated as doubletime. Note: If time on holiday qualifies for a higher paytype because of other rules, it will be promoted. If time on the holiday has a per-job or per-event setting, this value will be overridden.
- **Work Pay Type Time Cap**: If work pay type is not set to default then this option can limit the amount of time that is promoted to a different pay type.
- **Work Time OT/DT/PT Reduces Daily/Weekly OT/DT/PT Requirement**: Select "Yes" if, when employees work on holidays and the work pay type setting above is OT/DT/PT, the weekly hours required to reach OT/DT/PT should be reduced as well. For example, an employee works 40 hours in a week with 8 hours occurring during this holiday. With this option set to "No" the employee would not earn weekly overtime until 48 hours total (when the weekly ST hours worked during non-holiday periods reach 40). With this option set to "Yes" the employee would begin earning weekly overtime at 40 hours total (when weekly ST hours worked during non-holiday periods reach 32).

  Unless the option for Work Pay Type is something other than Default this option is ignored.
- **Work Pay: Hourly Rate**: For work done in the Observed Range, pay this hourly rate.
- **Work Pay: Differential**: For work done in the Observed Range, add this differential to the hourly rate.
- **Work Pay: Percentage Multiplier**: For work done in the Observed Range, multiply hourly pay by this percentage.
- Click on the **Submit** button to impletment the settings.

Holiday Groups

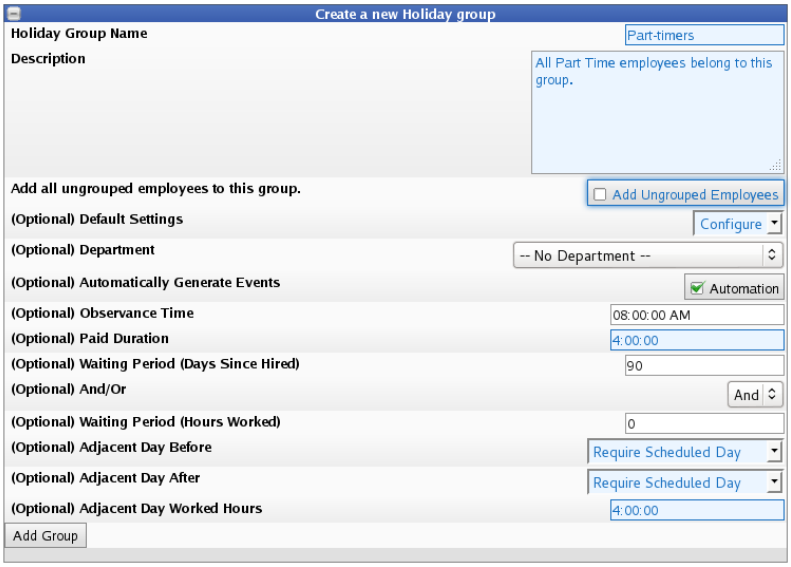
TimeIPS Holiday Groups provide a way for multiple employees to observe holidays in different ways. For example, a "Full Time" group might get full holiday pay, while a "Part Time" group might get half-day pay. A "Contractor" group might get no pay at all. Holiday groups can be deactivated, but not deleted: this is to preserve archival information about paid holidays and the time they were paid.

Using the left pane Main Menu » Administration, click on: Holidays » Holiday Groups



CREATE A NEW HOLIDAY GROUP

- Click the **+** (plus) sign to the left of the **Create a new Holiday group** bar to expand the window.



- **Holiday Group Name**: The name of this group. This name will be referenced when any report is run for an employee in this group. This is to distinguish employees in differing groups with different holiday settings. TimeIPS allows flexible holiday configuration, so that people in different groups have different observance rules for the same holiday.
- **Description**: A description of this group. It can be helpful to put details about membership into this field, such as "People who have worked less than 4 years and thus only get half of a day off for New Year's Eve."

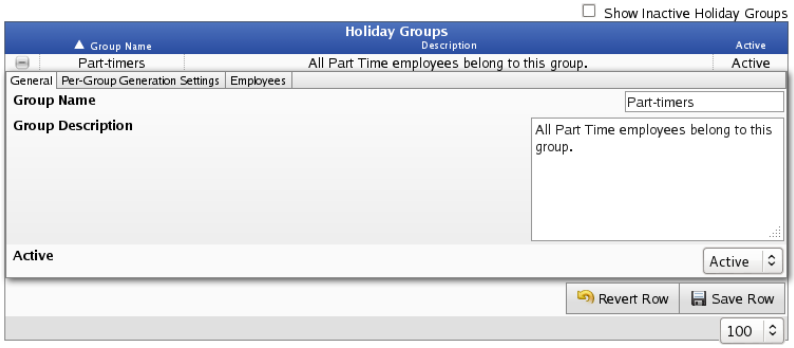
- **Add all ungrouped employees to this group**. By checking this box, all employees that are not currently in a group will be placed into this group.
- **(Optional) Default Settings**: All Holiday Observances created for this group will follow these settings. If these optional settings are not configured, Holiday Observances will be created using the options for the Holiday itself. If "Configure" is chosen, the following optional settings will display.

NOTE: Settings can always be changed on a per-event basis.

  - **Department**: Select the department that Holiday Events generated by these settings should be tracked against.
  - If **Automatically Generate Events** is checked, the Holiday Engine will automatically create future observances and events without the need for any human interaction.
  - **Observance Time**: The time of day during the Holiday that it will be observed and paid. This is set to 8:00 AM by default.
  - **Paid Duration**: The duration of time the holiday event will pay. This is set to 8 hours by default
  - **Waiting Period (Days Since Hired)**: The number of days since an employee was hired before qualifying for a holiday. This is set to 90 days by default.
  - **And/Or**: Employees can either meet one of the two Waiting Period requirements, or both of them. Set to "And" to require both, and set to "Or" if meeting either will allow an employee to qualify for the holiday.
  - **Waiting Period (Hours Worked)**: The number of hours worked since the employee was hired, before being able to qualify for a holiday.
  - **Adjacent Day Before**: To qualify for a holiday, an employee may be required to work a valid day before. This can be the preceeding Calendar Day, to closest preceeding Scheduled Day, or the closest Weekday in the case of weekend holidays. If the previous day is configured as a Holiday, the day preceeding it will be used, and so on.
  - **Adjacent Day After**: To qualify for a holiday, an employee may be required to work a valid day after. This can be the following Calendar Day, to closest following Scheduled Day, or the closest Weekday in the case of weekend holidays. If the following day is configured as a Holiday, the day after it will be used, and so on.
  - **Adjacent Day Worked Hours**: To qualify for a holiday, an employee must work this many hours on each configured adjacent day. If this is set to 0 hours, the Adjacent Day configurations will be ignored. This is set to 8 by default.
- Click on the **Submit** button to impletment the settings.

EDIT OR DEACTIVATE HOLIDAY GROUPS

- Click the **+** (plus) sign to the left of the **Holiday Group Name**.

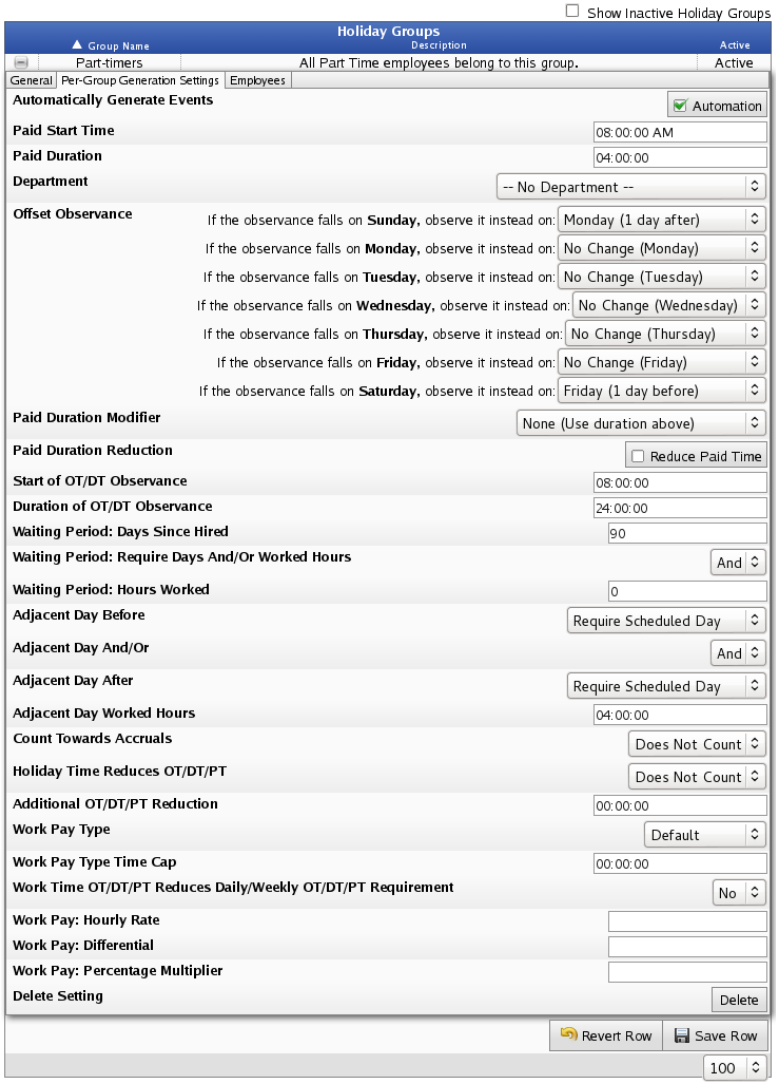


- From the General tab, the **Group Name** and **Description** can be changed.

NOTE: Holiday groups can be deactivated, but not deleted. This is to preserve archival information about paid holidays and the time they were paid.

Pre-Group Generation Settings

Creating custom settings for Holiday Event Generation can be done by expanding the Holiday Group and then clicking on the **Pre-Group Generation Settings** tab.



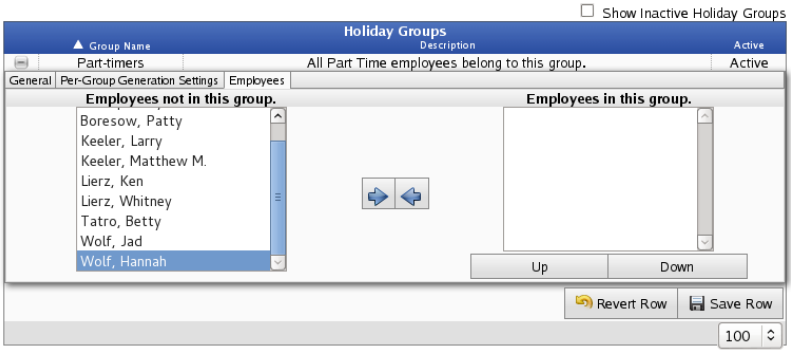
- If **Automatically Generate Events** is checked, the Holiday Engine will automatically create future observances and events without the need for any human interaction.
- **Paid Start Time**: The time of day during the Holiday that it will be observed and paid. This is set to 8:00 AM by default.
- **Paid Duration**: The duration of time the holiday event will pay. This is set to 8 hours by default
- **Department**: Select the department that Holiday Events generated by these settings should be tracked against.
- **Offset Observance**: When an automatically generated holiday falls on a sepcified day of the week, you can configure TimeIPS to observe that holiday, instead, up to six days before or after that chosen day. For example, if Christmas Eve falls on a Saturday and Christmas Day falls on a Sunday, you can configure TimeIPS to have Christmas Eve occur one day before (on Friday), and Christmas Day to occur one day after (on Monday).
- **Paid Duration Modifier**: This option modifies the selected holiday pay duration in one of four ways.
  - ***None:*** *The paid amount is not modified. Employees will receive the holiday pay duration set above.*
  - ***Prorate 40H vs Sch Weekly Hours:*** *Grants a percent of the holiday pay duration set above as a proportion of scheduled weekly hours to 40 hours. If an employee is scheduled for 30 hours of work and 8 hours of holiday pay is configured, the employee will receive 6 hours of holiday pay.*
  - ***In/Out Schedule Time:*** *Grants the employee the amount of time scheduled for the day* ***instead of*** *the holiday pay duration set above. If an employee is scheduled for 6 hours the day of a holiday and 8 hours of holiday pay is configured, the employee will receive 6 hours of holiday pay.*
  - ***Default Job Coverage:*** *Grants the employee the amount of time scheduled for their default job coverage on the scheduled day* ***instead of*** *the holiday pay duration set above.*
- **Paid Duration Reduction**: Enable this option to reduce the duration of holiday hours paid by the amount of time worked or benefits used during the holiday observance range.
- **Start of OT/DT Observance**: (Optional) Hours prior to holiday paid time to begin the holiday DT/OT observance.
- **Duration of OT/DT Observance**: (Optional) Duration of the holiday observance. Used for holidays that promote worked time to overtime or doubletime during a holiday.
- **Waiting Period: Days Since Hired**: The number of days since an employee was hired before qualifying for a holiday. This is set to 90 days by default.
- **Waiting Period: Require Days And/Or Worked Hours**: Employees can either meet one of the two Waiting Period requirements, or both of them. Set to "And" to require both, and set to "Or" if meeting either will allow an employee to qualify for the holiday.
- **Waiting Period: Hours Worked**: The number of hours worked since the employee was hired, before being able to qualify for a holiday.
- **Adjacent Day Before**: To qualify for a holiday, an employee may be required to work a valid day before. This can be the preceeding Calendar Day, to closest preceeding Scheduled Day, or the closest Weekday in the case of weekend holidays. If the previous day is configured as a Holiday, the day preceeding it will be used, and so on.
- **Adjacent Day And/Or**: Set to "And" if the employee must satisfy both the day before rules and the day after rules. Set to "Or" if the employee may earn the holiday by satisfying either rule.
- **Adjacent Day After**: To qualify for a holiday, an employee may be required to work a valid day after. This can be the following Calendar Day, to closest following Scheduled Day, or the closest Weekday in the case of weekend holidays. If the following day is configured as a Holiday, the day after it will be used, and so on.
- **Adjacent Day Worked Hours**: To qualify for a holiday, an employee must work this many hours on each configured adjacent day. If this is set to 0 hours, the Adjacent Day configurations will be ignored. This is set to 8 by default.

- **Count Towards Accruals**: Set to "Counts" if the Holiday Pay Hours time for this holiday should be used to count as worked time for benefit accrual calculations.
  Note: Holidays always count toward benefit tenure level calculations.
- **Holiday Time Reduces OT/DT/PT**: Select "Counts" if, in accordance with Canadian Labour Code, Part III, Division I, 169(3) as of Jan. 1 2007, employees getting this holiday should have "the hours of work of the employee in that week ... be reduced by the standard hours of work for each general holiday in that week." If holidays do not affect the hours an employee must work to get weekly overtime, choose "Does Not Count."
- **Additional OT/DT/PT Reduction**: In addition to or instead of the previous option to allow Holiday hours to reduce weekly Overtime requirements, holidays can also be configured with an additional arbitrary number of hours that are subtracted from each employee's weekly Overtime requirement. For example, if a holiday event is 8 hours long, the holiday event is set to reduce Overtime requirements, and this option is also set to 8 hours then the weekly Overtime requirement would be reduced by 16 hours from possibly 40 to 24.
- **Work Pay Type**: Select "Over Time" if, in accordance with Canada Labour Code, Part III, 202 (1) as of Jan. 1, 2007, employees following this Overtime Policy should have all hours worked on the same calendar day as a holiday treated as overtime. Select "Double Time" if all hours worked during the holiday should be treated as doubletime. Note: If time on holiday qualifies for a higher paytype because of other rules, it will be promoted. If time on the holiday has a per-job or per-event setting, this value will be overridden.
- **Work Pay Type Time Cap**: If work pay type is not set to default then this option can limit the amount of time that is promoted to a different pay type.
- **Work Time OT/DT/PT Reduces Daily/Weekly OT/DT/PT Requirement**: Select "Yes" if, when employees work on holidays and the work pay type setting above is OT/DT/PT, the weekly hours required to reach OT/DT/PT should be reduced as well. For example, an employee works 40 hours in a week with 8 hours occurring during this holiday. With this option set to "No" the employee would not earn weekly overtime until 48 hours total (when the weekly ST hours worked during non-holiday periods reach 40). With this option set to "Yes" the employee would begin earning weekly overtime at 40 hours total (when weekly ST hours worked during non-holiday periods reach 32).

  Unless the option for Work Pay Type is something other than Default this option is ignored.
- **Work Pay: Hourly Rate**: For work done in the Observed Range, pay this hourly rate.
- **Work Pay: Differential**: For work done in the Observed Range, add this differential to the hourly rate.
- **Work Pay: Percentage Multiplier**: For work done in the Observed Range, multiply hourly pay by this percentage.
- **Delete Setting**: Click the **Delete** button to remove this setting. This only affects the custom settings for this combination of holiday and holiday group. Holiday event generation will follow the more general rules that remain.
- Click on the **Submit** button to impletment the settings.

Employees

The Employees tab shows and allows you to change who is and is not in this particular Holiday Group.



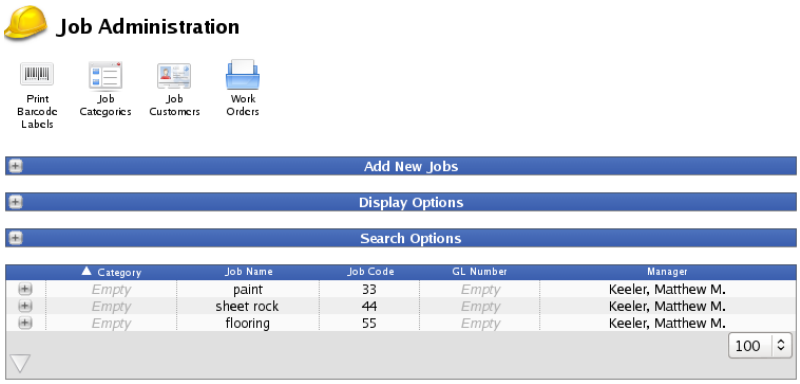
- To add an employee to the group, click on the employees name in the left column labeled **Employees not in this group** and click the blue arrow pointing to the right. The employee's name will then appear in the right column labeled **Employees in this group**.

TIP: To select multiple employees, hold down the Ctrl key while clicking on employees' names.

Jobs

Job Administration allows you to configure jobs, manage employee job membership, pay rates, and configure job tracking on specific jobs and projects. You can also assign jobs to customers and organize your jobs by assigning them to categories. The IPSIPS optional module is required. The IPSJOB module provides additional options including unlimited numbers of jobs.

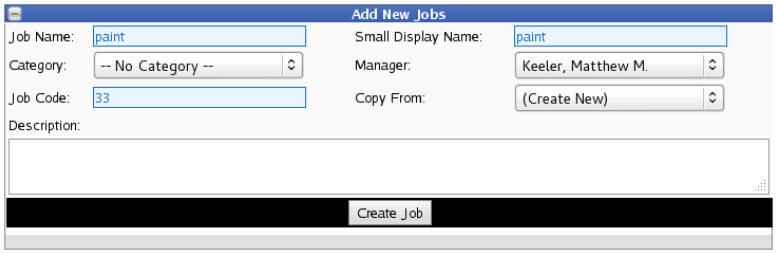
Using the left pane Main Menu » Administration, click on: Jobs » Jobs



ADD A NEW JOB

TIP: If you plan on assigning jobs to customers for billing purposes or to organize jobs by categories, set up the Job Categories and Job Customers first.

- Click the **+** (plus) sign to the left of the **Add New Jobs** bar to expand the window.



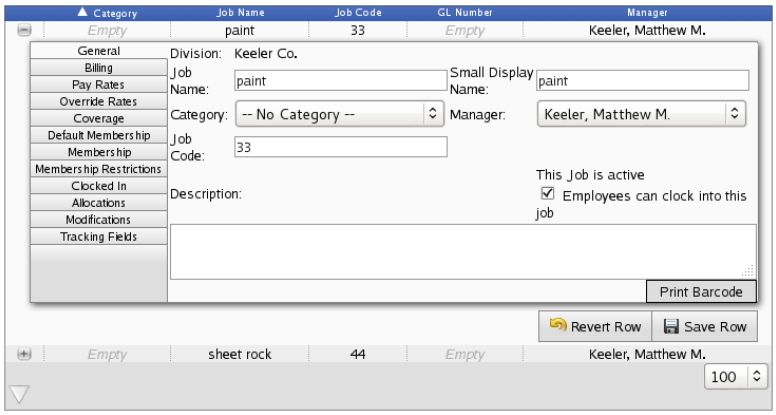
- **Job Name**: If a computer monitor is connected directly to your TimeIPS time station, the Long Name displays when employees clock in and out of a job. Long names must be unique within each job category. Maximum 24 characters.
- **Small Display Name**: The job Short Name displays on the TimeIPS LCD display when employees clock, and on some reports. Maximum 14 characters.
- *(Optional)***Category**: Job categories can be used to help organize jobs. Set up the categories before entering jobs by using the Job Categories link from the Jobs menu in TimeIPS.
- *(Optional)* **Manager**: If a manager is selected for a job, that employee can have the special ability to edit time events where an employee worked the job. For this to work, the employee must also have the Job Manager permission group, and within that group, the option to "Edit" must be selected for "Clock Events" for "Employees working on jobs you manage." Note that a job manager must still have the ability to view clock events for all employees that might work their job, as without view permission, the edit permission alone will not cause the employee to be visible.
- *(Optional)* **Copy**: If you select an existing job from this list and press "Create Job", a new job will be created with the settings from the copied job.
- *(Required for Validated Jobs)* **Job Code**: A Job Code can be 1-12 alpha-numeric characters in length. Each Job Code must be unique. Employees clock in and out of jobs using the this job code. The employee will enter the job code from the TimeIPS numeric keypad, from an alpha-numeric computer keyboard connected to TimeIPS (PS2 or USB), or with a barcode scanner when clocking in/out of jobs.

NOTE: The TimeIPS 8150 Series Barcode Reader requires a minimum of 4 characters. The TimeIPS LS4000 Series Barcode Reader will read 1-12 characters.
NOTE: Job Codes can include numbers, capital and lower case letters, and dashes. Job Codes are case sensitive.

- *(Optional)* **Description**: Enter a description of the job for reference, if desired.
- Click on the **Create Job** button to add your new job.

ENTER JOB DETAILS or EDIT AN EXISTING JOB

- Click the **+** (plus) sign to the left of the **Job Name** to expand the window.

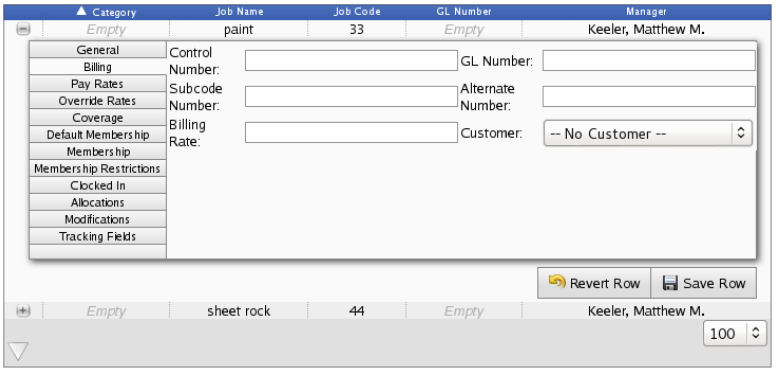


General Tab

- Enter or edit the Job Details as needed. (Refer to the descriptions above under "Add A New Job".)
- To Hide or Deactivate Jobs, uncheck the **This Job is active** box. You will no longer be able to use this job and it will be hidden from your list of Jobs.

NOTE: The job may only be deactivated or hidden if there are no employees listed in the Default Membership. If this job is listed as any employee's default job, the checkbox will not appear.

Billing Tab



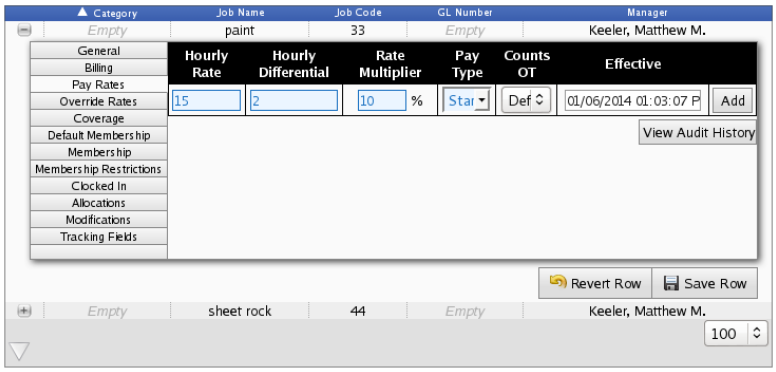
- The **Control Number** can be used to link job codes to another application you might be using, such as payroll software. It can have a maximum of 8 digits.
- **GL (General Ledger) Number** can be used to indicate an account number associated with the job. It can have a maximum of 32 characters.
- The **Subcode Number** can be used to track, classify, or associate this job. It can have a maximum of 32 characters.
- The **Alternate Number** can be used to track, classify, or associate this job. It can have a maximum of 32 characters.
- Each job can be assigned a **Billing Rate** that will display on the Extended Employee/Job Report. This rate will not be used to calculate the employee's gross pay for each job. You can, however, use functions within your spreadsheet application to create gross billing calculations.
- Jobs can be assigned to specific **Customers**. Set up the Customers before entering jobs by using the Job Customers link from the Jobs menu in TimeIPS.

NOTE: You can create Customer and/or Category information at a later time and assign jobs accordingly for reporting purposes.

- Be sure to click the **Save Row** button when you are finished.

Pay Rates Tab

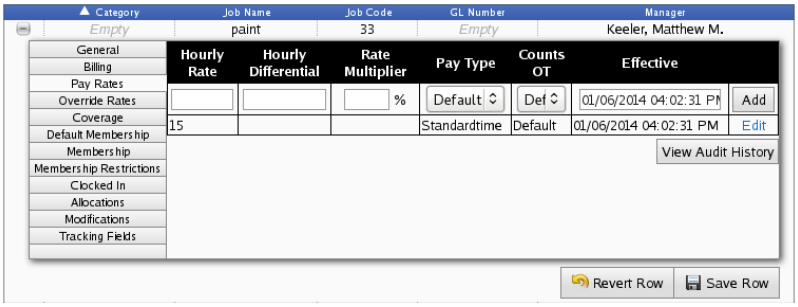
Each job can be assigned a specific **Pay Rate** that will be applied to any employee who works this job, as long as a specific job rate has not been assigned to that employee.



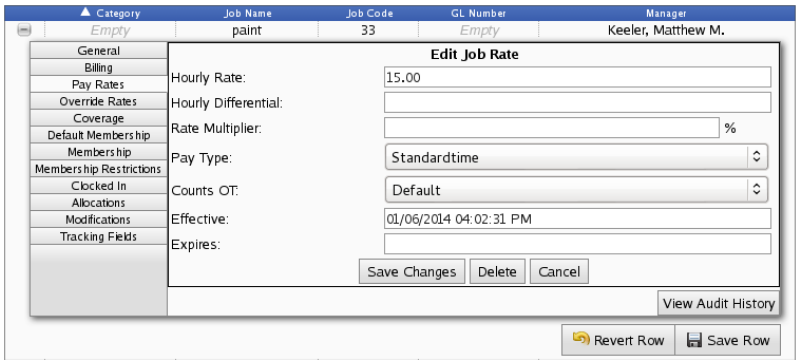
- To add a job Pay Rate:
  - Enter the **Hourly Rate**, **Hourly Differential**, or **Rate Multiplier** percentage.
    - **Hourly Rate**: An employee working this job will earn this rate instead of his/her usual hourly rate (defined in the employee's Employment tab in Employee Administration). Enter as a dollar amount.
    - **Rate Multiplier**: An employee working this job will earn his/her usual hourly rate (defined in the employee's Employment tab in Employee Administration), multiplied by this percentage. Enter as a number. Do not enter a percentage sign.
    - **Hourly Differential**: An employee working this job will earn his/her usual hourly rate (defined in the employee's Employment tab in Employee Administration), plus this differential. Enter the dollar amount to be added to the employee's base rate (i.e., .25 for twenty-five cents).

    NOTE: Only one of the above pay rate types may be assigned per job.

  - Add the date and time the rate becomes **Effective**.
  - Click the **Add** button to apply the rate.



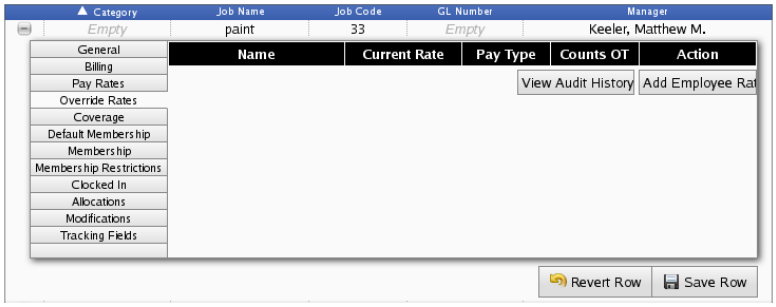
- Once it's added, click on the **Edit** button to make changes to the rate, add an expiration date, or delete the pay rate entry all together.



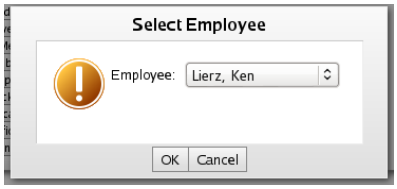
- To see a list of all the changes that have been made to pay rates, click the **View Audit History** button.

Override Rates Tab

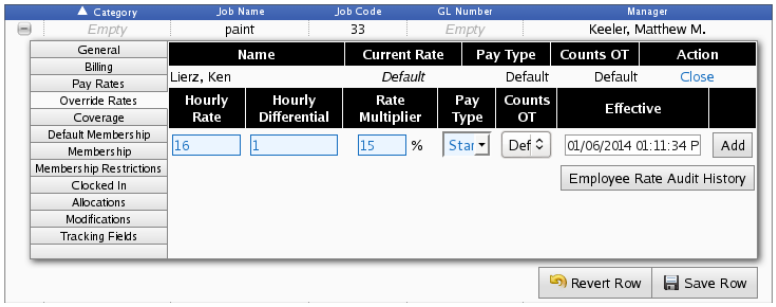
Each job can be assigned specific pay rates per employee. This is done on the Override Rates tab which allows you to view and edit the individual employee job pay rates.



- Click on the **Add Employee Rate** button.



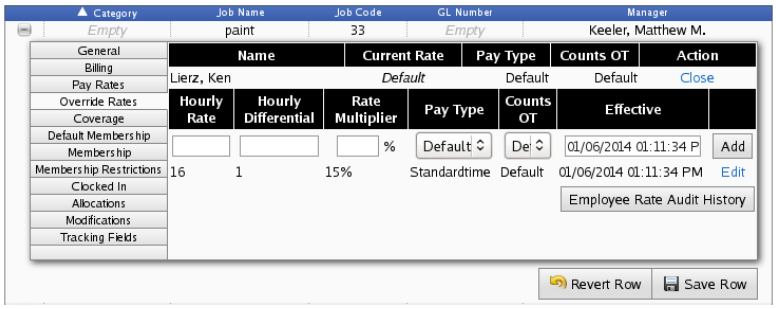
- Choose the **Employee** from the drop-down box and click on **OK** to continue or **Cancel** to close the window.
- After clicking on OK, the job rate option fields will appear below the name of the employee you selected.



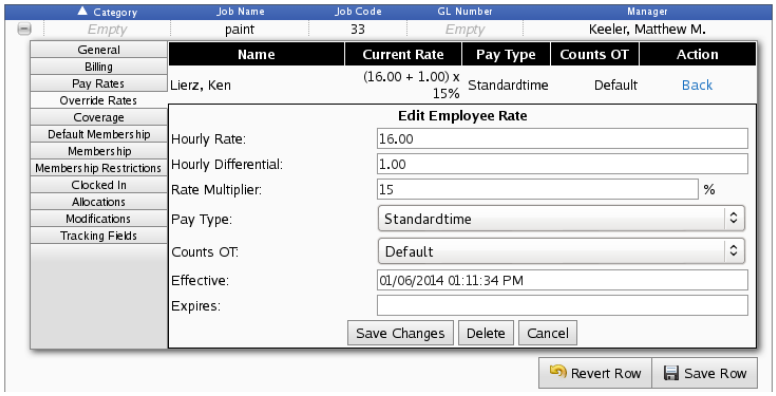
- Enter the **Hourly Rate**, **Hourly Differential**, or **Rate Multiplier** percentage.
  - **Hourly Rate**: An employee working this job will earn this rate instead of his/her usual hourly rate (defined in the employee's Employment tab in Employee Administration). Enter as a dollar amount.
  - **Rate Multiplier**: An employee working this job will earn his/her usual hourly rate (defined in the employee's Employment tab in Employee Administration), multiplied by this percentage. Enter as a number. Do not enter a percentage sign.
  - **Hourly Differential**: An employee working this job will earn his/her usual hourly rate (defined in the employee's Employment tab in Employee Administration), plus this differential. Enter the dollar amount to be added to the employee's base rate (i.e., .25 for twenty-five cents).

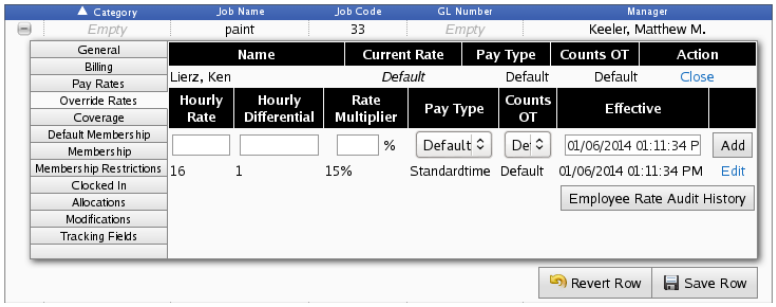
NOTE: Only one of the above pay rate types may be assigned per employee for this job.

- Add the date and time the rate becomes **Effective**.
- Click the **Add** button to apply the rate.

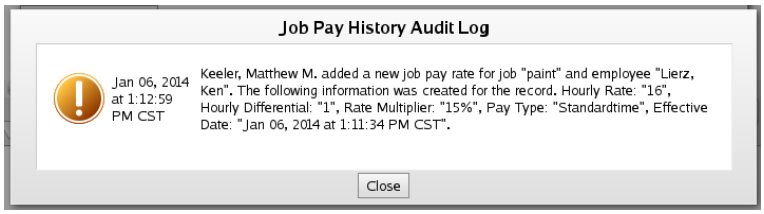


- Once it's added, click on the **Edit** button to make changes to the rate, add an expiration date, or delete the pay rate entry all together.



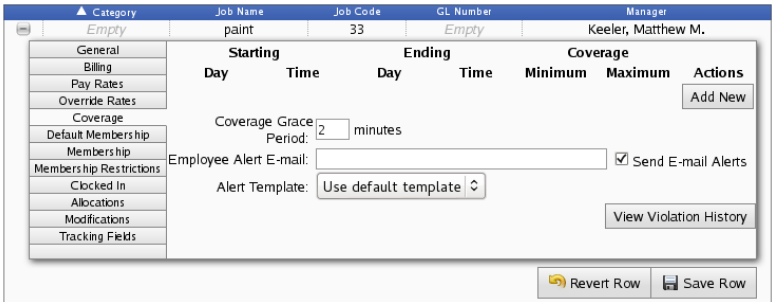


- Each employee that has been assigned an individual job rate will be listed by **Name** and **Current Rate**.
- To review all job rates that have been assigned to an individual employee, click on the **Employee Rate Audit History** button for that employee.

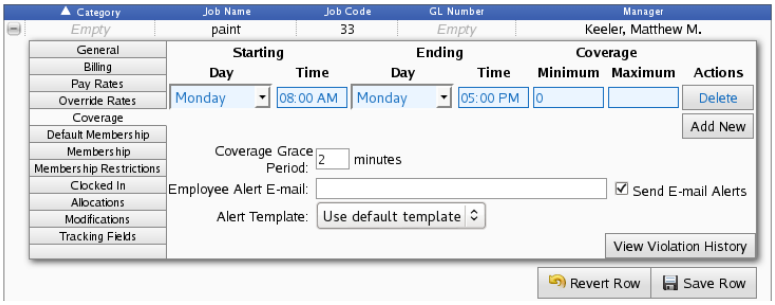


Coverage Tab

Each job can be assigned coverage rules. If the number of employees clocked into the job violates the rules, email alerts can be sent and the violations can be viewed with the "View Violation History" button.

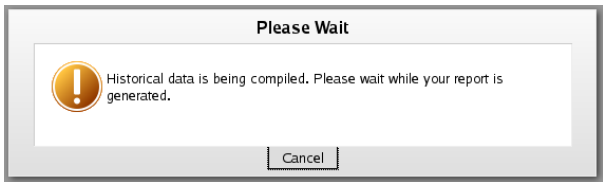


- To add a new coverage rule, click the **Add New** button.

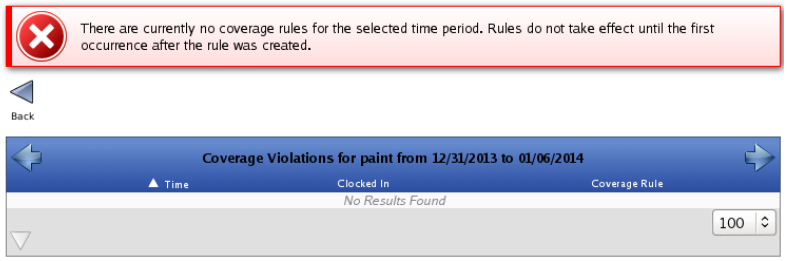


- Enter a **Starting** and **Ending** day and time, as well as the Minimum and/or Maximum number of employees that are allowed to be clocked in during this time.
- While this schedule rule is in effect, an alert will be sent if fewer than the minimum and more than the maxmum employees are clocked in beyond the **Coverage Grace Period**. This alert will be sent to the email address you enter in the **Employee Alert E-Mail** field. To stop sending alerts, uncheck the **Send E-Mail Alerts** box.
- Click the **Save Row** button to impletment the rule.

- Click the **View Violation History** button to see a list of all the violations that have been made to your coverage rules.



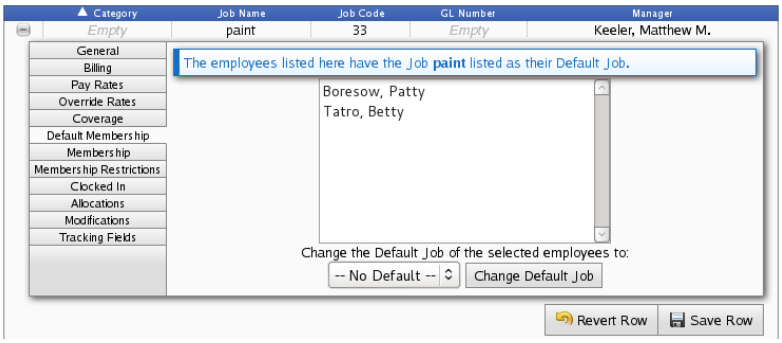
Job Coverage Violation History



- Use the left arrow to view previous weeks and the right arrow to return back to more recent weeks.

Default Membership Tab

Employees can be assigned to a specific job by default. When employees clock in, they are automatically signed into the default job unless they manually choose a different job.

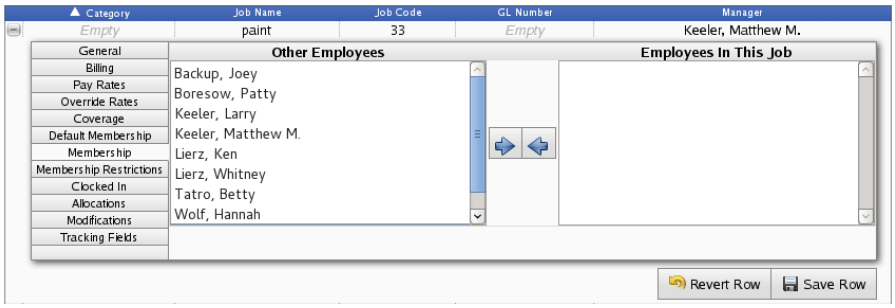


- To change an employees default job, click on the employee's name.
- Choose that employee's new default job from the drop down list, and then click the **Change Default Job** button.

NOTE: For employees to appear on the Default Membership list, employees must first be given a default job in the Employees section of TimeIPS (Employees >> Employees >> Employment tab). Once they appear on the list, their default job can be changed from their current Default Membership tab.

Membership Tab

Each job can be assigned a specific set of employees.

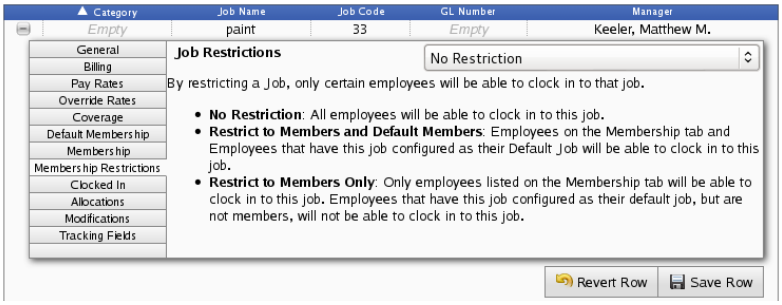


- To add an employee to the job, click on the employees name in the left column labeled **Other Employees**, then click the blue arrow pointing to the right. The employee's name will then appear in the right column labeled **Employees In This Job**.

TIP: To select multiple employees, hold down the Ctrl key while clicking on employees' names.

Membership Restrictions Tab

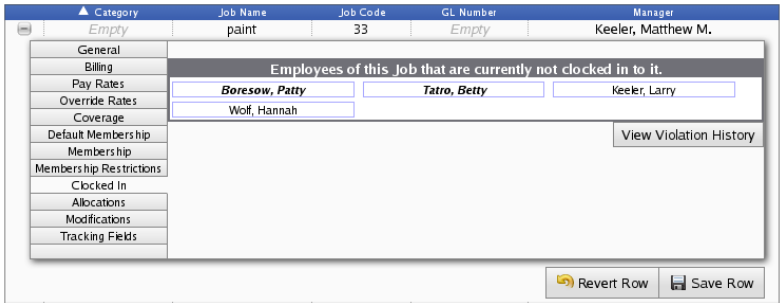
The job can be restricted to allow only certain employees to clock in to that job.



- **No Restriction**: All employees will be able to clock in to this job.
- **Restrict to Members and Default Members**: Employees on the Membership tab and Employees that have this job configured as their Default Job will be able to clock in to this job.
- **Restrict to Members Only**: Only employees listed on the Membership tab will be able to clock in to this job. Employees that have this job configured as their default job, but are not members, will not be able to clock in to this job.

Clocked In Tab

This tab provides a quick view of employees clocked into the job, as well as members and default members who are not clocked into this job.



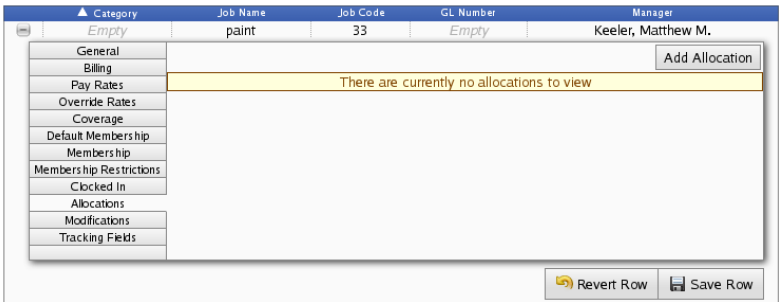
Default Members appear ***bold and italic***, where as regular members do not.

The **View Violation History** link provides the same coverage violation report as mentioned in the Coverage section above.

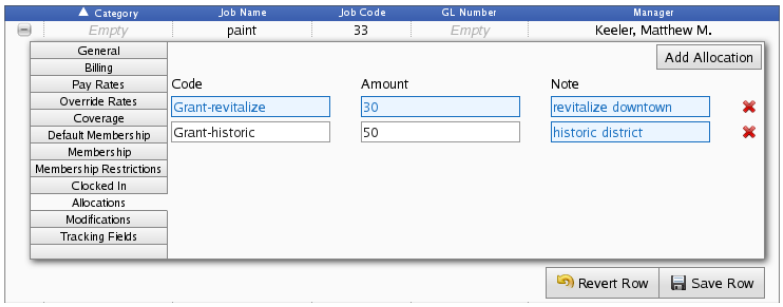
Allocations Tab

The Allocations tab allows you to allocate the employee's time into categories. Allocations are commonly used in conjuction with grants and are generally displayed on custom reports or custom payroll to show the proportion of time worked in different areas.

NOTE: This feature requires the IPSBRD module.

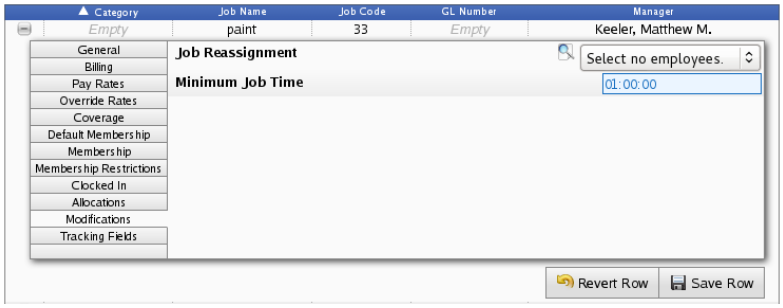


- To add, click the **Add Allocation** button and enter a unique **Code**, an **Amount** (this can be a specific amount or a percentage), and an optional Note.
- Click the red **X** to delete an allocation.



Modifications Tab

From the Modifications tab, you can set up job reassignment and a mininum job time.

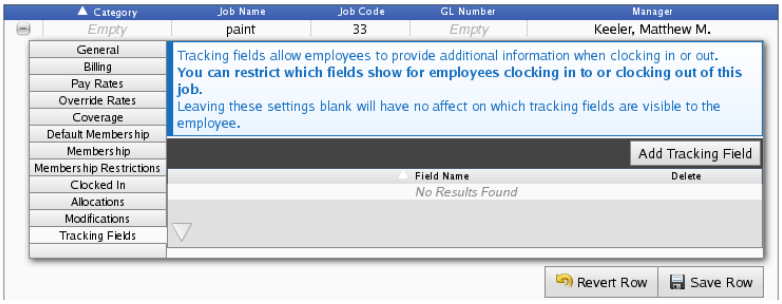


- **Job Reassignment**: When a job is reassigned to an employee, all time worked by any employee on that job will be credited to the selected employee.
- **Minimum Job Time**: When an employee clocks out of this job, their clockout time will be adjusted if needed to meet the minimum requirement. This rule is applied after every clockout from this job.

EXAMPLE: If an employee clocks in twice for fifteen minutes each time and the minimum job time is one hour, they will receive two hours worked time.

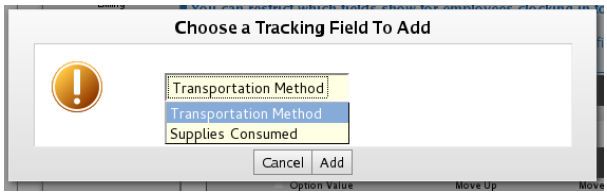
Tracking Fields Tab

Tracking fields allow employees to provide additional information when clocking in or out.

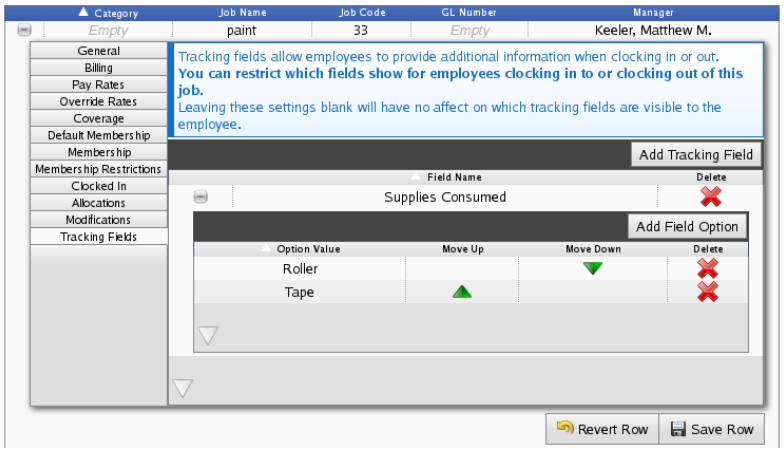


Leaving these settings blank will have no affect on which tracking fields are visible to the employee, but by adding tracking fields here, **you are restricting which fields show for employees clocking in to or clocking out of this job.**

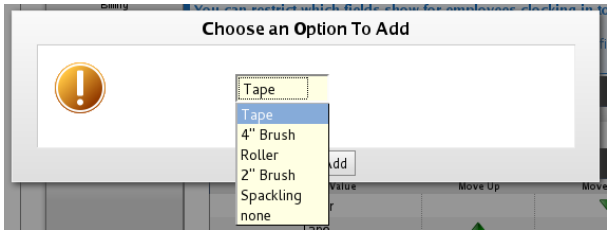
- To add, click the **Add Tracking Field** button.



- Click on the Tracking Field to view the full list of options and select the one you wish to add, then click the **Add** button.



- To add field options, click the **Add Field Option** button.

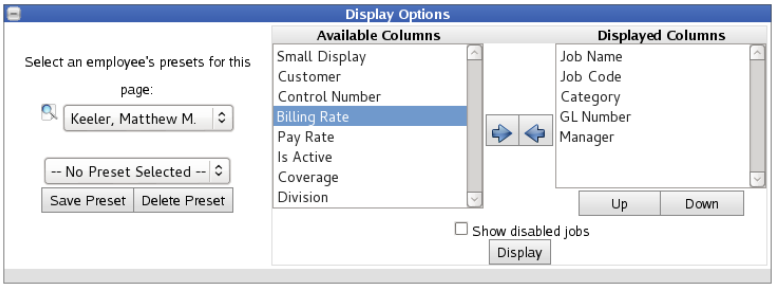


- Click on the Field Option to view the full list of options and select the one you wish to add, then click the **Add** button.

DISPLAY OPTIONS

Display Options allow you to customize the Jobs table.

- Click the **+** (plus sign) on the **Display Options** bar to expand the window.



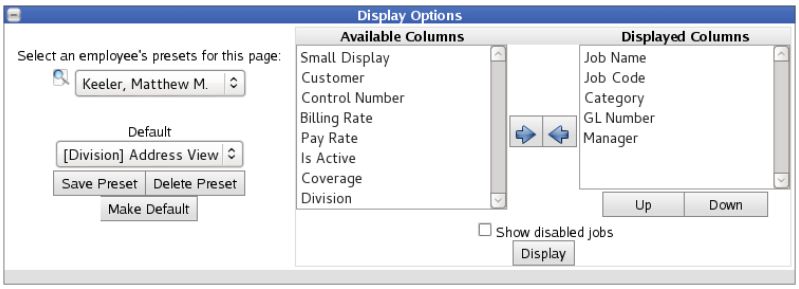
- Click on the **Display** button to view the changes in the Jobs table.
- Move items from the **Available Columns** window to the **Displayed Columns** window by clicking on the desired field to highlight it, then click on the right arrow to move it.

TIP: You can select multiple items to move by holding down the CTRL key while clicking on the individual fields. All the selected fields will be highlighted.

- To change the order in which the **Displayed Columns** appear, click on a field to highlight it and then use the **Up** and **Down** buttons to arrange the list in the order you prefer.
- - OR - Click on **Save Preset** to save your custom view.

- You will be prompted to enter a **Name** for this Preset. Enter a descriptive name and click **OK**.

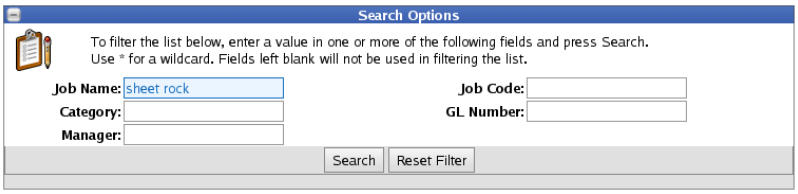
- You will then be prompted to choose between a **Personal Preset**, **Division Preset**, or **Global Preset** depending on which level should show this as an available option.



- To use a saved Preset display, select the Preset name from the pull-down menu. The Jobs list will automatically refresh.
- Click on the **Make Default** button to see this custom view each time you return to the Job Adminstration page.

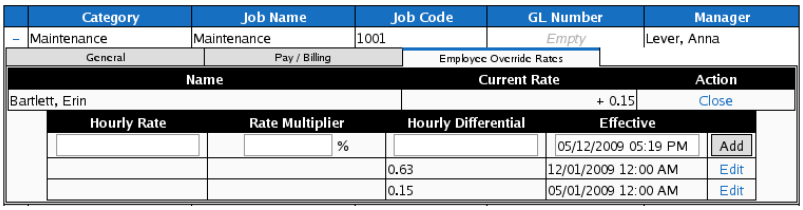
SEARCH OPTIONS

To filter the list below, enter a value in one or more of the following fields and press Search. Use * for a wildcard. Fields left blank will not be used in filtering the list.



Internal Information (visible to Administrators only):

EXAMPLE: In the image below, we can see that Erin Bartlett's pay rate for Quality Control increases from an hourly differential of 0.15 beginning 05/01/2009 12:00am to 0.63 as of 12/01/2009 12:00am.

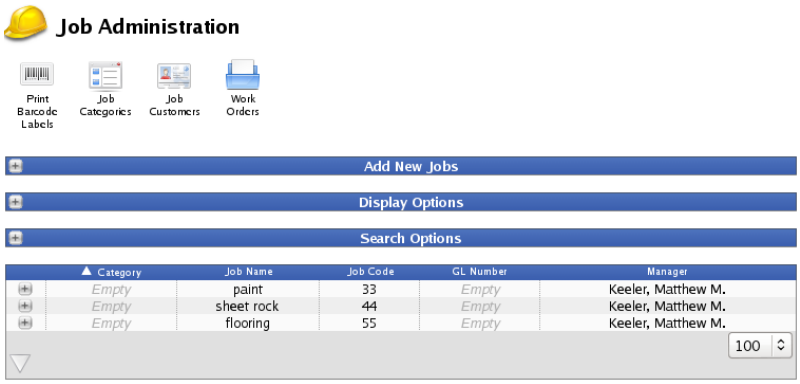


See Also:
Job Categories
Job Customers
Jobs
Job Management Import/Export
Jobs

Print Job Barcode Labels

You can print an individual Job barcode labels or multiple Job barcode labels through TimeIPS. The labels can be printed on plain paper or on label stock compatible with Avery® 5160 (3 across, 10 down; label size 2.6 inches x 1 inch) or Avery® 5197 (2 across, 6 down; label size 4 inches x 1.5 inch).

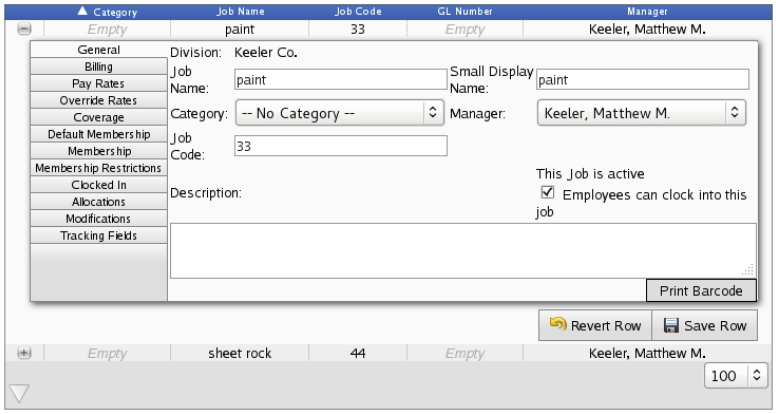
Using the left pane Main Menu » Administration, click on: Jobs » Jobs



To Print Job Barcode Labels

Either....

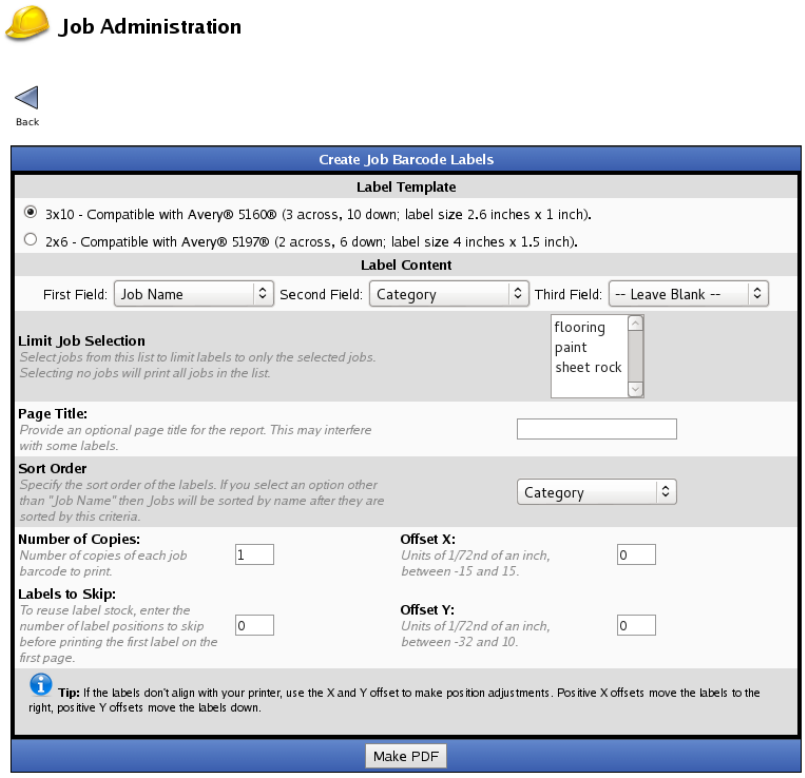
1. Open the job by clicking the **+** (plus) sign next to the job name.
2. Click on the **Print Barcode** button at the bottom right on the General Tab.



Or....

Click on the Print Barcode Labels icon

at the top of the page.



- Select options on the Configuration page.
  - Choose either the 3x10 or 2x6 **Label Template**.
  - Choose what **Content** you want to print on the label.
  - The job you opened on step one will be selected, but you can choose a different one from the **Limit Job Selection** list.
  - Optionally, provide a **Page Title** for the report. This may interfere with some labels.
  - Specify the **Sort Order** of the labels. If you select an option other than "Job Name" then Jobs will be sorted by name after they are sorted by this criteria.
  - The **Number of Copies** is set to 1, but you can change it to how ever many copies you need.
  - If you are reusing label stock, enter the number of label positions to skip before printing the first label on the first page.
  - If the labels don't align with your printer, use the Offset X and Y to make position adjustments. Positive X offsets move the labels to the right, positive Y offsets move the labels down.
- Click on the **Make PDF** button. TimeIPS will generate the job barcode label using Adobe Reader.

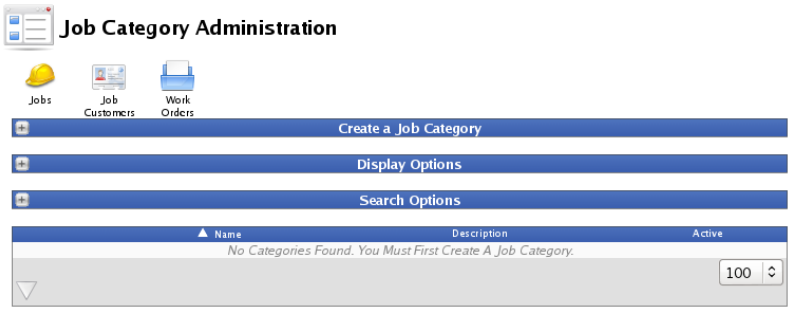
Note: Job barcodes are printed in Code 128

See Also:
Print Employee Barcode Badges
Jobs
Print Job Barcode Labels

Job Categories

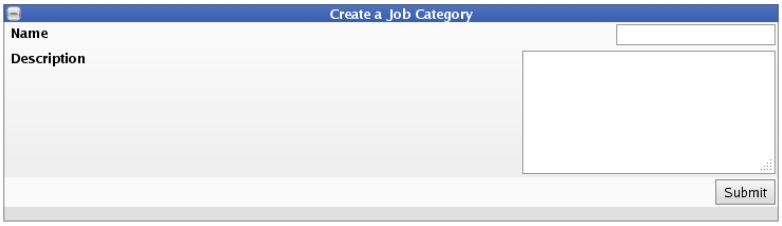
Job categories allow you to organize jobs for reporting purposes. Associations between jobs and categories can be made on the Job Administration page.

Using the left pane Main Menu » Administration, click on: Jobs » Job Categories



Add a New Job Category

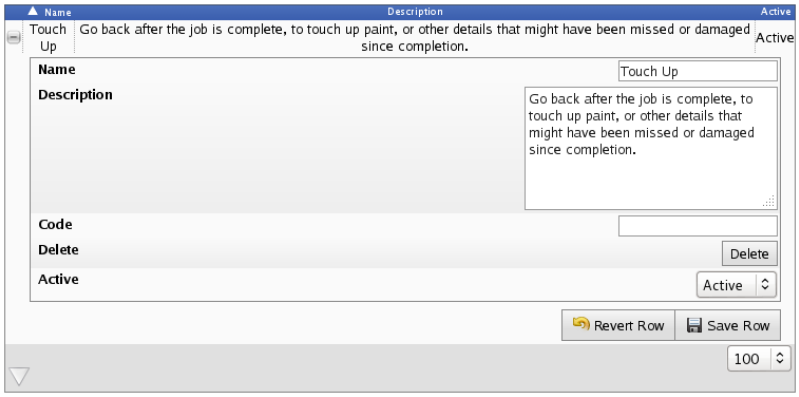
1. Click the **+** (plus) sign to the left of the **Create a Job Category** bar to expand the window.



2. Enter a unique **Name** with a maximum of 24 characters.
3. Optionally, provide a more detailed **Description** of the category.
4. Click the **Submit** button to generate the new category.

EDIT or Enter Details for an existing Job Category

1. Click the **+** (plus) sign to the left of the **Job Category Name** to expand the window.



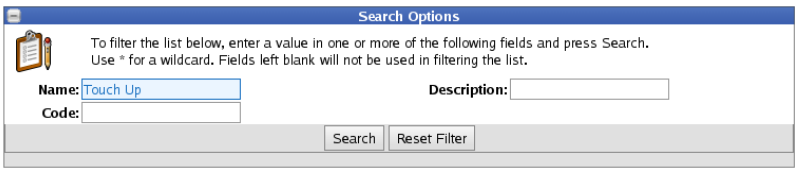
2. If necessary, enter/adjust the **Category Name** and/or **Description**.
3. You can provide a **Code** to use to refer to this category in custom exports.
4. You can delete this category only if there are no jobs associated with it, by clicking on the **Delete** button.
5. To allow jobs to be placed in this category, and allow this category to be visible on the "Job Details" interface, choose **Active** from the drop down menu. To not allow this, select **Inactive**.
6. Click on the **Save Row** button to save your changes.

To Show Hidden Categories

- To show hidden job categories, click the **+** (plus) sign to the left of the **Display Optinos** bar.
- Check the **Show Hidden** box and click the **Display** button.

Search Options

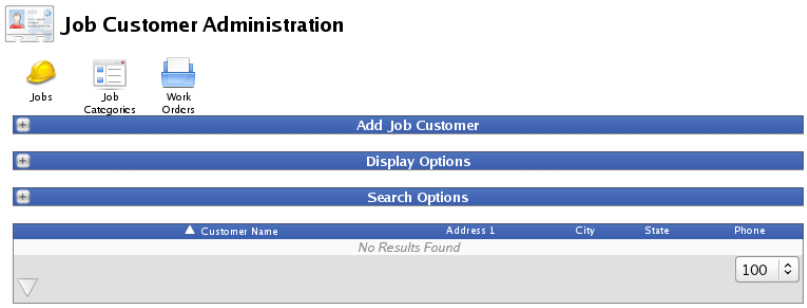
To filter the list below, enter a value in one or more of the following fields and click the **Search** button. Use * for a wildcard. Fields left blank will not be used in filtering the list.



Job Customers

Job Customers allow you to assign a customer to a specific job or jobs for billing purposes

Using the left pane Main Menu » Administration, click on: Jobs » Job Customers



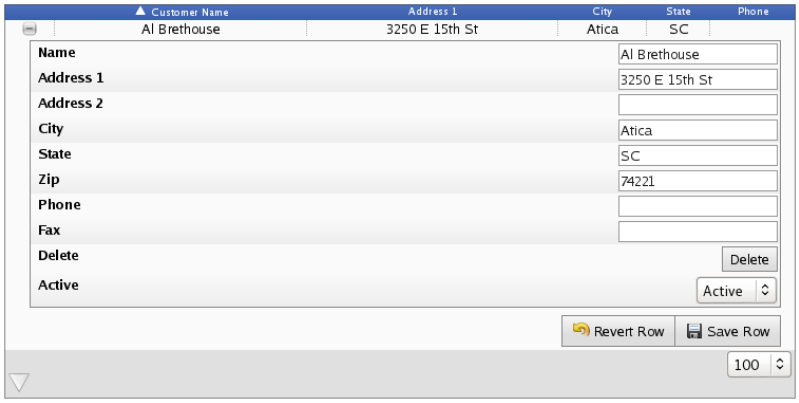
Add a New Job Customer

1. Click the **+** (plus) sign to the left of the **Add Job Customer** bar to expand the window.

2. Enter a unique **Name** with a maximum of 64 characters.
3. Fill in the remaining details as needed.
4. Click the **Submit** button to add the new customer.

EDIT or Enter Details for an existing Job Customer

1. Click the **+** (plus) sign to the left of the **Job Customer Name** to expand the window.



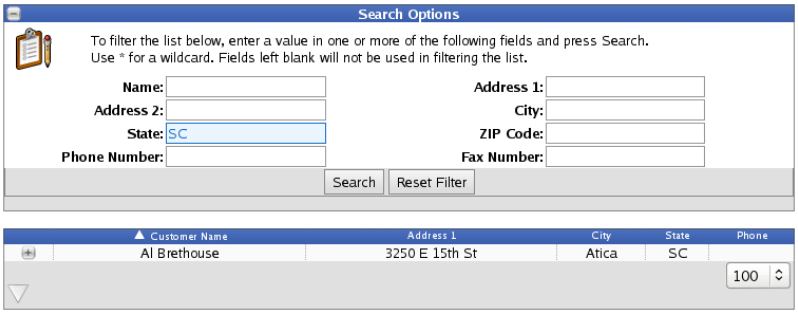
2. If necessary, enter/adjust the **Customer Name** and/or other details.
3. You can delete this customer only if there are no jobs associated with it, by clicking on the **Delete** button.
4. To allow jobs to be connected in this customer, and allow this customer to be visible on the "Job Details" interface, choose **Active** from the drop down menu. To not allow this, select **Inactive**.
5. Click on the **Save Row** button to save your changes.

To Show Hidden Customers

- To show hidden job customers, click the **+** (plus) sign to the left of the **Display Optinos** bar.
- Check the **Show Hidden** box and click the **Display** button.

Search Options

To filter the list below, enter a value in one or more of the following fields and click the **Search** button. Use * for a wildcard. Fields left blank will not be used in filtering the list.



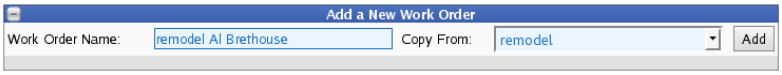
Real-Time Work Order Tracking

This Article covers how to create and use work orders in TimeIPS that contain one or more jobs. This feature requires the Real-Time Work Order Tracking (IPSJWO) module.

Using the left pane Main Menu » Administration, click on: Jobs » Work Orders

Add a New Work Order

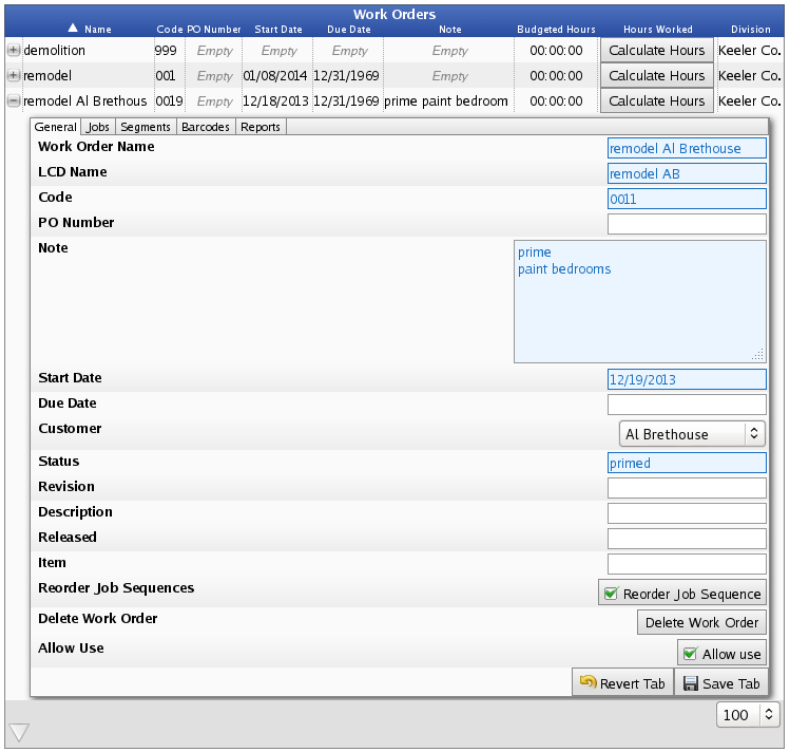
- Click the **+** (plus) sign to the left of the **Add a New Work Order** bar to expand the window.



- Enter a unique **Name** that describes this work order.
- Optionally, you can **Copy From** an existing work order by selecting it from the drop down list.
  In this example system, 2 work orders have been created to act as templates for future work orders with the same grouping or order of jobs.
- Click the **Submit** button to generate the new category.

EDIT or Enter Details for an existing Work Order

- Click the **+** (plus) sign to the left of the **Work Order Name** to expand the window.



General information

- If necessary, enter/adjust the **Work Order Name** and/or **LCD Name**.
- In the **LCD Name** field, type the name you wish to be displayed on the TImeIPS LCD screen.

- Type the **Code** employees will use to clock into this Work Order.

NOTE: To use a barcode scanner with a work order, the CODE must be a 4 or more digit numeric value.

- Optionally, enter a **PO number** for the purchase order associated with this Work Order.
- Optionally, enter a **Note** for this Work Order.
- Type or select the **Start Date** from the drop down calendar. This is when the Work Order is scheduled to begin.
- **Due Date**: Enter or select the date the Work Order is due to be completed.
- From the drop down menu, choose the **Customer** that will receive the bill for this Work Order. (For instructions on creating a customer, see the **Job Customers** article.)
- The following are optional descriptive data fields that can be used in association with this Work Order: **Status**, **Revision**, **Description**, **Released**, and **Item**.
- Checking the **Reorder Job Sequences** box results in the following: If there are numeric gaps in the Job Order sequence (found on the Jobs tab), the gaps will automatically be closed creating a contiguous yet still relative order.

Example 1: If you have 3 jobs listed and you remove job ordered "2", the job ordered "3" will become "2" to close the gap. If you try to change 3 to 19, it will not change.

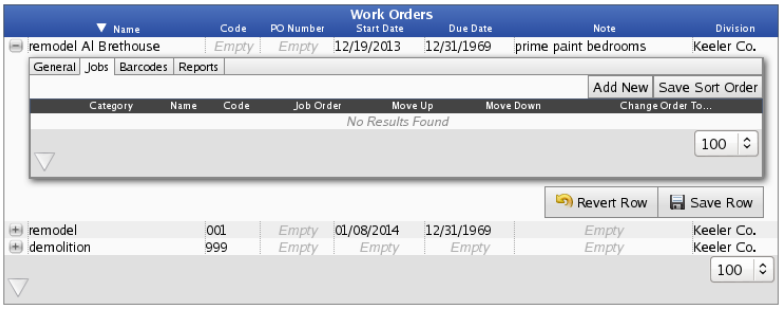
If you do not want the order number to automatically change, uncheck the **Reorder Job Sequences** box.

Example 2: If you have 3 jobs listed and you remove job ordered "2", the job ordered "3" remains "3". If you manually change "3" (using the Change Order To... box) to "19", it stays 19 regardless if there are job order numbers 1 through 18 or if there is another 19.

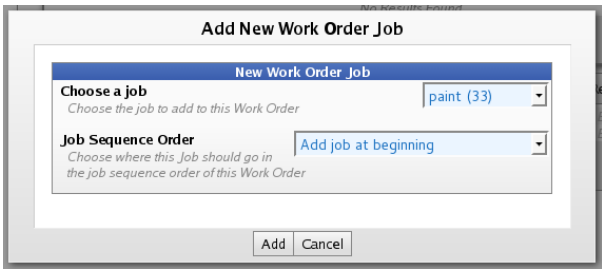
- The Work Order can be deleted by clicking on the **Delete Work Order** button.
- To **Allow Use** of this Work Order, check the box.
- Click on the **Save Row** button to save your changes.

Assign Jobs

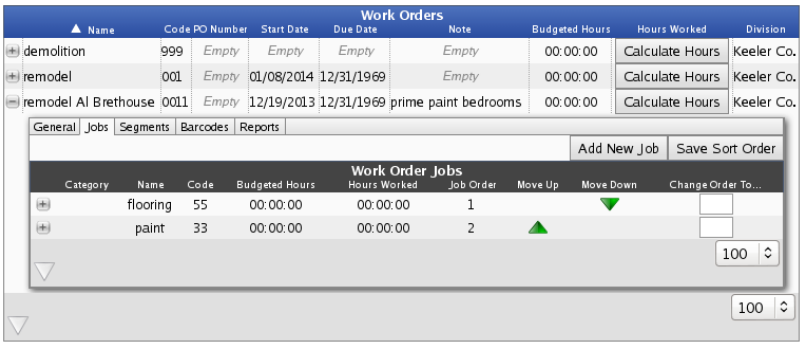
From the Jobs tab, you can assign, remove, and edit Jobs associated with work orders.



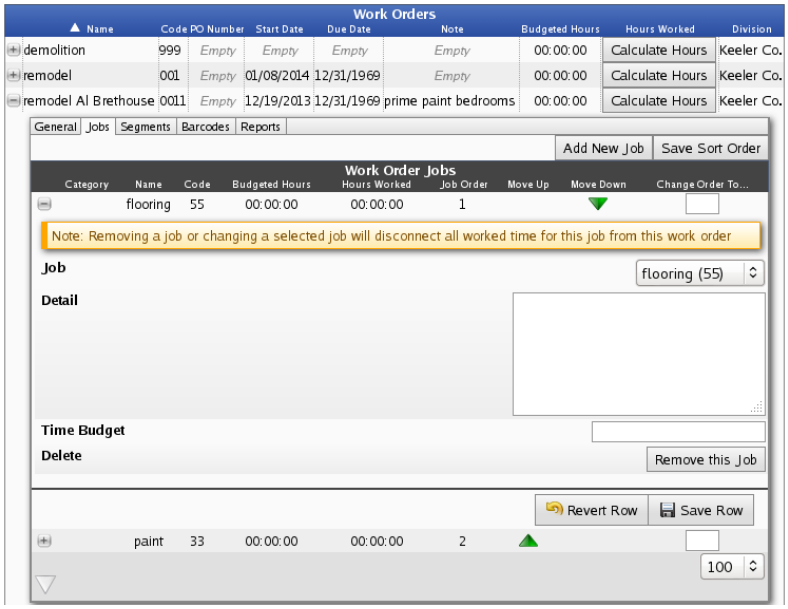
- Click the **+** (plus) sign to the left of the **Work Order Name** to expand the window.
- To assign jobs to the work order, click on the **Add New** button.



- Use the drop down menu to **Choose a Job**. (For instructions on creating a job, see the **Jobs** article.)
- Optionally, choose where this job will be appear in the **Job Sequence Order**.
- Click on the **Add** button.

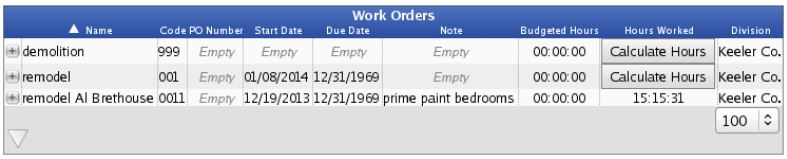


- To rearrange the Jobs, click on the **Move Up** and **Move Down** arrows or enter the Job Order number into the **Change Order To...** box.
- Click the **+** (plus) sign to the left of the **Job Name** to expand the window.



- Optionally, add important notes or job **Details**.
- Optionally, set a **Time Budget** (in hours) for the job.

NOTE: The Budgeted Hours assigned to the individual Jobs in this Work Order will appear as a total in the "Budgeted Hours" column of the Work Order table. In the example shown, the individual Jobs have not been assigned Budgeted Hours and therefore the Work Order's Budgeted Hours also reflects 00:00.

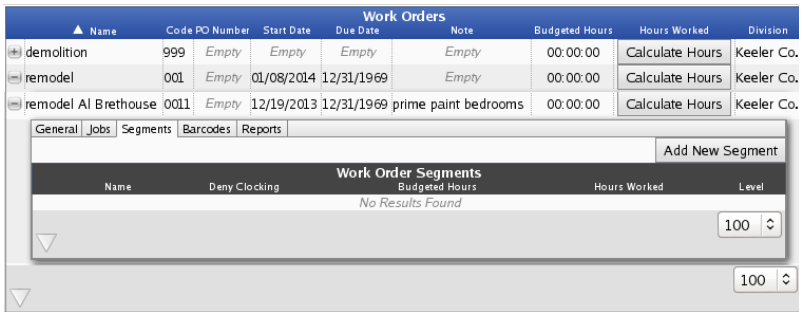


Once there is time worked in these Jobs, you can click the "Calculate Hours" button to generate the total "Hours Worked".

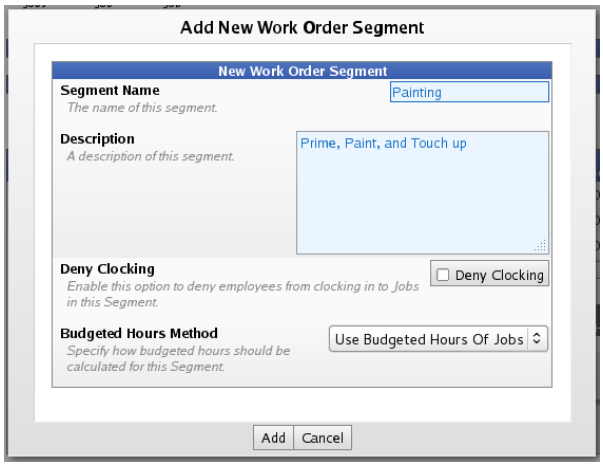
- To delete the job from this Work Order, click on the **Remove this Job** button.
- To assign another job to the work order, click on the **Add New** button again and repeat the process.

Segments

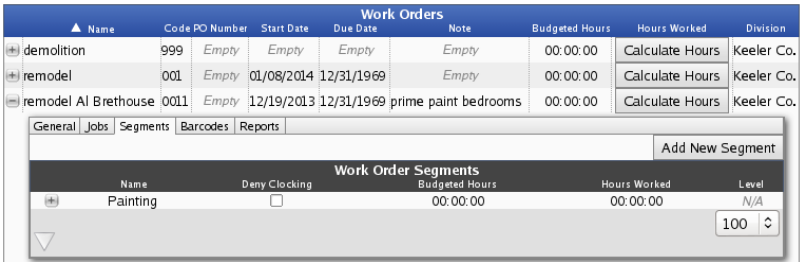
From the **Segments** tab, you can create, remove, and edit Segments of Jobs. Multiple Jobs can be grouped into Segments which combines their budgeted hours. For example: Prime, Paint, and Touch Up might be separate Jobs to make sure those specific tasks are assigned and completed, but the hours budgeted for Painting are really the combined hours spent on these 3 Jobs. These 3 Jobs can be grouped together as a Segment and the total hours worked on this Segment can be tracked. Alerts can be sent out if the worked time is reaching the hours budgeted.



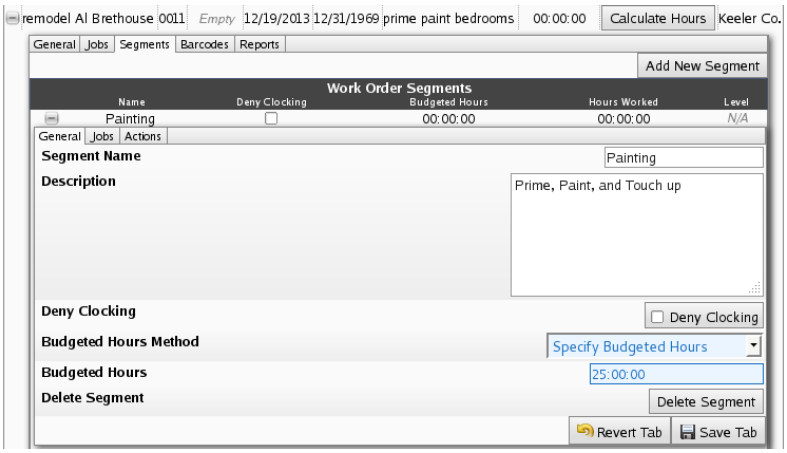
- To create a new Segment, click the **Add New Segment** button.



- **Name** the Segment.
- Optionally, give it a **Description**.
- If employees should be prevented from clocking into Jobs in this Segment, check the **Deny Clocking** box.
- Specify which **Method** should be used to calculate **Budgeted Hours**.
- Click the **Add** button to save.



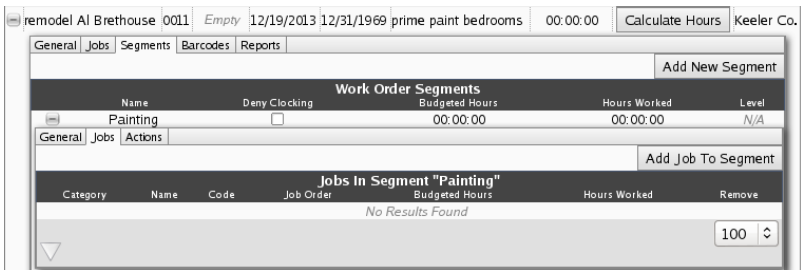
- Click on the **+** (plus) sign to the left of the Segment Name.



- From the **GENERAL tab**, you can make changes to any of the information used to create the Segment.

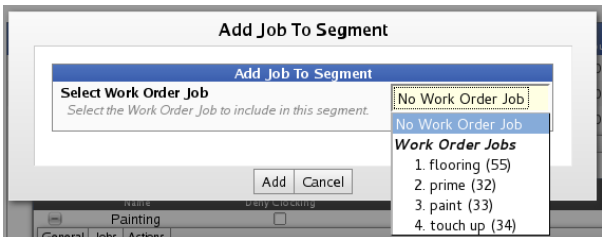
NOTE: Instead of assigning an amount of Budgeted Hours for each Job, you can select "Specify Budgeted Hours" here and assign the total Budgeted Hours for the Segment.

- Be sure to click the **Save Tab** button if any changes are made.

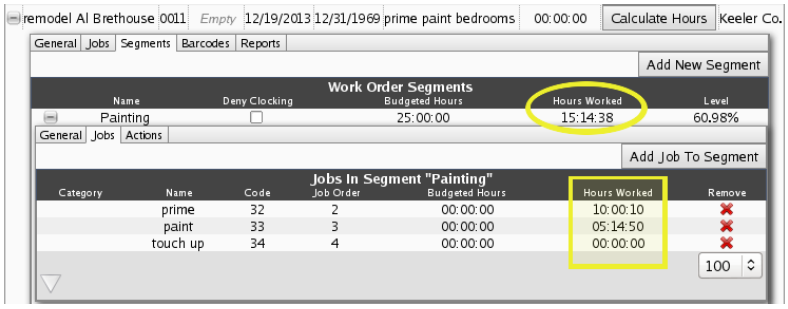


- From the **JOBS tab**, you can Add Jobs to this Segment. The following 3 steps will need to be repeated for each Job you want to include.

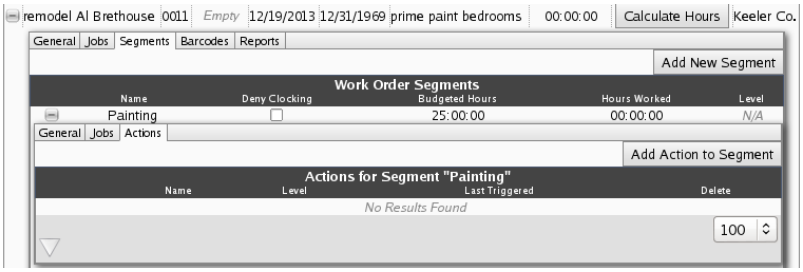
  1. Click the **Add Job to Segment** button.



  2. **Select a Job** from the drop down box to be included in this Segment.
  3. Click the **Add** button.



- Once there is worked time, it will appear in the **Hours Worked** column of the **Jobs in Segment** table and as a total in the **Work Order Segments** table.
- You can also view the total hours worked for this Segment on the Time Report. First, go to the **Time Edit/Report** page. Choose **Show Advanced Options**. Select the Work Order then the Segment from the **Filter by Job** drop down list. To finish, click the **View Report** button.

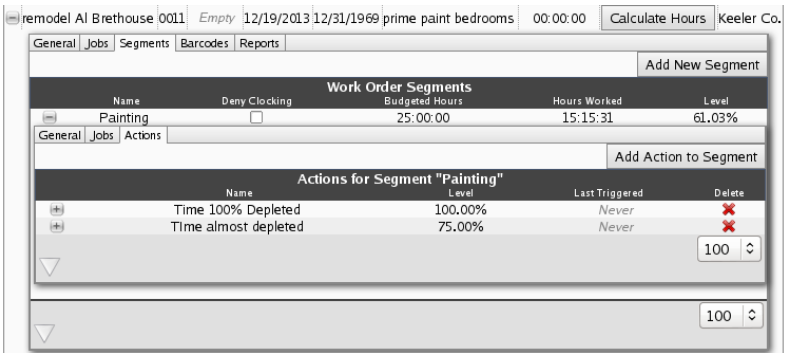


- To setup Alerts and other actions, go to the **ACTIONS tab** and click the **Add Action to Segment** button.

Action Example 1:

- **Name** the Action.
- Optionally, give this Action a **Description**.
- Suppy a **Trigger At Percentage.** When hours worked in this Segment reach this percentage of the budgeted hours this Action will be triggered. Set to blank to disable.
- Optionally, **Set Deny Clocking**. If this box is checked when the action is triggered, employees will not be able to clock in to any job in this Segment.
- Optionally, choose to **Send an Email** alert.
  - From the drop down list, select an **Employee** to receive the email alert.
  - And/or enter one or more **Email Addresses** that will receive the email alert. Separate mutilple addresses with a space.
  - Optionally, choose an **Email Template** to override the stock message. If you have the IPSEML module you can configure your own template.
- Click the **Add** button to implement the Action.

Action Example 2:

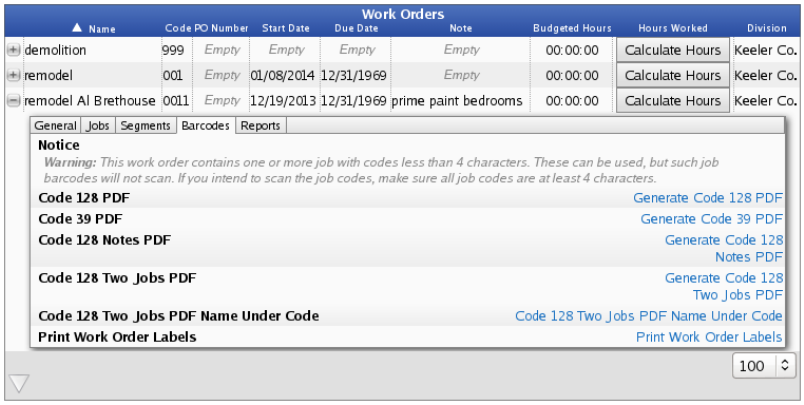


- **Edit** Actions by clicking on the **+** (plus) sign to the left of the Action Name.
- **Delete** an Actoin by clicking the red **X** to the right of the Action.

TIP: There are expression funtions available to show work order Segment information on Custom Payroll reports. See the Supported Functions for Advanced Expressions article for more details.

Generate Barcodes

From the **Barcodes** tab, you can generate and print a Barcode of the work order and all of the jobs assigned to the work order. The Barcodes can then be scanned using a barcode reader to clock into a specific job on a specific work order. Therefore, this provides time tracking and can be reviewed using the Work Order Report.



- Click on the appropriate link to **Generate a PDF**.
- **Code 128 PDF**: Work Order Summary with Code 128 Barcodes for Smart Clocking
- **Code 39 PDF**: Work Order Summary with Code 39 Barcodes for Explicit Clocking
- **Code 128 Notes PDF**: Work Order Summary with Code 128 Barcodes for notes and Smart Clocking
- **Code 128 Two Jobs PDF**: Work Order Summary showing two Work Order Jobs per row.
  Uses Code 128 Barcodes for Smart Clocking
- **Code 128 Two Jobs PDF**: Name Under Code: Work Order Summary showing two Work Order Jobs per row with the job name under the barcode. Uses Code 128 Barcodes for Smart Clocking
- **Print Work Order Labels**: Print a PDF with just Work Order barcodes.

NOTE: To view PDF files, you must have an up to date version of Adobe Acrobat Reader installed on your computer. You can download Adobe Acrobat Reader free of charge at the Adobe Website.

WORK ORDER

Customer:
Al Brethouse
3250 E 15th St
Atica SC 74221

Work Order Code:
0011

Name: remodel Al Brethouse	Start: 2013-12-19	Due: Not set	PO# Not specified

Work Order Jobs

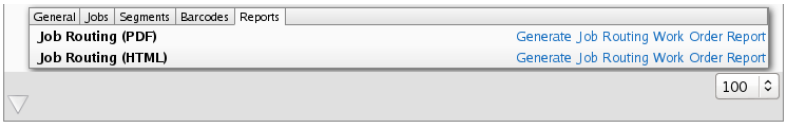
BarCode	Job	Detail
55/0	flooring	
32/1	prime	
33/2	paint	
34/3	touch up	

Job Routing Reports

From the **Reports** tab, you can generate and print Job Routing reports which are designed for Work Orders with long Job descriptions.

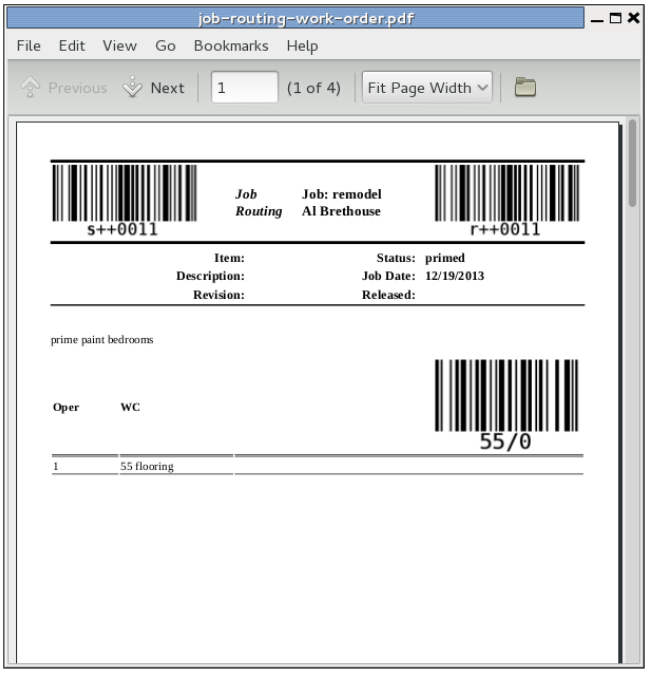
For this report, the descriptions support several formatting options:

- Lines that start with | will be indented half way across the page.
- Lines that start with + will be bold.
- Lines that start with |+ will be indented half way across the page and be bold.
- Standard HTML formatting is also supported, including tables, italics, bold, etc.
- Varients of this report can be created by TimeIPS to meet specific needs for job routhing in your application.



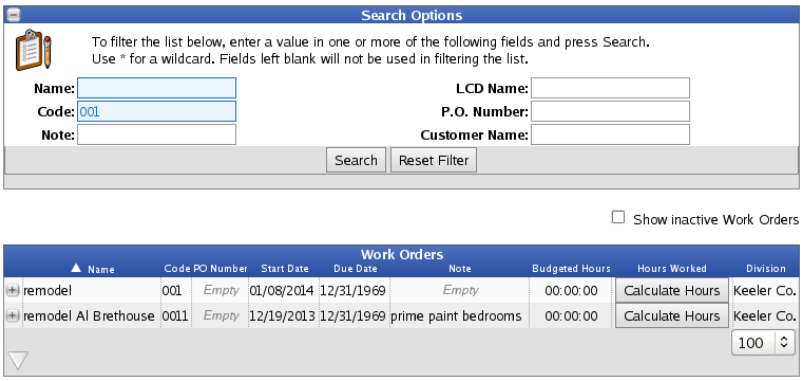
- Click on the appropriate link to generate either a **PDF** or **HTML** file.

NOTE: Job Routing (PDF) and Job Routing (HTML) are the same report, just different views.



Search Options

To filter the list below, enter a value in one or more of the following fields and click the **Search** button. Use * for a wildcard. Fields left blank will not be used in filtering the list.



Clocking into a Work Order

- **Using Explicit Clocking and "Select from List" in Clock Configuration**
  When using + to clock in or * to change jobs, the employee will be presented with a list of work orders. Use the Up and Down arrows (8 and 2 keys) on the keypad to go through the list and select a work order, then press Enter. The employee will then be presented with the list of jobs for that work order. Select a job and press Enter.

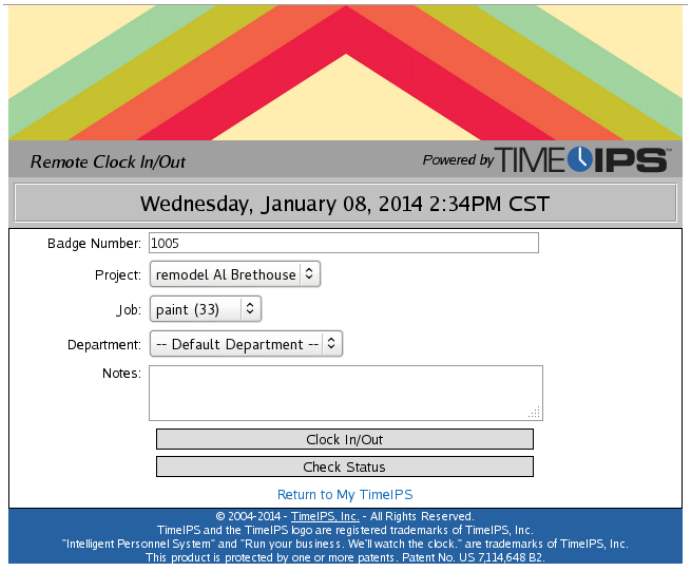
- **Using Explicit Clocking and "Text Input" in Clock Configuration**
  When using + to clock in or * to change jobs, the employee will be prompted to enter a work order. Enter the work order code using the keypad and press Enter, or scan the work order barcode using a barcode reader. The employee will then be prompted to enter a job code. Enter the job code using the keypad and press Enter, or scan the job code barcode using a barcode reader. (Note that the job code may include a slash and an additional number if a given job code appears more than once in the work order.)

- **Using Smart Clocking**
  When using the "smart clocking" feature to clock in or change jobs, the employee must enter the work order code and job code in the following format:

  *work order*job code*badge number*

  (Note that the job code may include a slash and an additional number if a given job code appears more than once in the work order.)

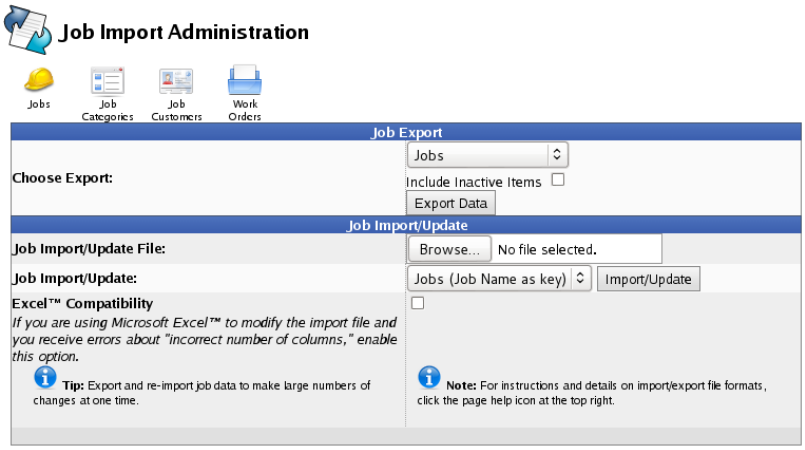
- **My TimeIPS » Remote Clocking**
  When using the remote clocking feature, type in your Badge Number. Select the Work Order from the drop down list, then select the Job from its drop down list. (In the Example below, Work Order has been renamed "Project".) Add notes if needed and click on the Click In/Out button.



Job Import/Export

TimeIPS can import Jobs, Job Categories, and Job Customers as well as update records using the Employee Import/Export optional module.

Using the left pane Main Menu » Administration, click on: Jobs » Import/Export

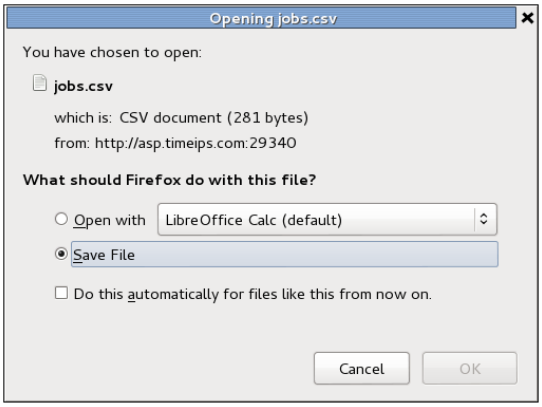


Export Job Data

By exporting job coverage, job employee rates, work orders, etc., you create a template file to either fill in the necessary information or rename the field labels in your existing spreadsheet of information.

1. Export the information to create a template.
   - Select the type of data to be exported from the **Job Export** drop down list, then click the **Export Data** button to generate a .csv file containing the selected information.

   TIP: To edit the resulting .csv file, we recommend a spreadsheet application such as Excel™ or OpenOffice Calc.



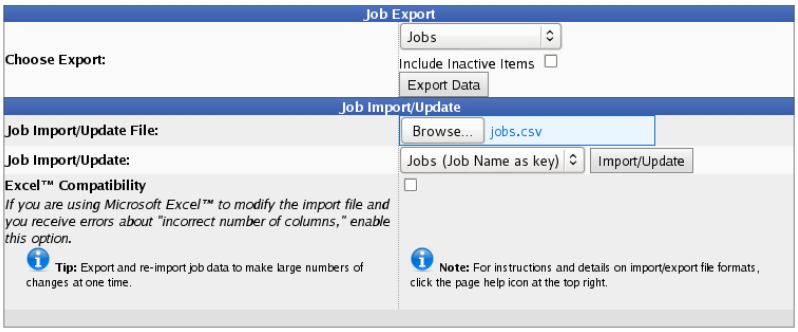
   [NOTE: Your screen may look different, depending on your computer's operating system.]
2. Adjust the spreadsheet as necessary.
   - If you already have a spreadsheet of the information you wish to import, open your existing spreadsheet and manipulate the column headers to match the field labels in the template you created in step 1.
   - If you do not already have a spreadsheet of the information you wish to import, enter the information into the template file you created in step 1.
3. Save the spreadsheet file of the information you wish to import as a Comma Separated (CSV) file.
   - If using Microsoft Excel, go to the File menu - Save As option. In the "Save as type" pull-down, select "CSV (Comma delimited) (*.CSV)"

   NOTE: A prompt may appear notifying you that there some features or formats may not be saved in a comma separated file. Answer "Yes" to the prompt.

4. Import the Information into TimeIPS.
   - If you make changes to the .csv file and would like those changes to take effect in TimeIPS®, use the "Job Import/Update" function below.

Update/Import Job Data

Use the Update/Import feature when there are a large number of changes that need to be made at one time. If you wish to create your own file instead of using an exported template, view the detailed job, job coverage, employee pay override, category, customer, or work order instructions page.



1. Once the file is created, click on the **Browse** button and navigate to the CSV file to be imported.
2. Select the data to be imported from the **Job Import/Update** drop-down box.

   NOTE: In cases where multiple jobs or work orders have the same name or code, you must specify a "key" on the import page. The "key" is what differeniates them.

3. Click on the **Import/Update** button.

   NOTE: TimeIPS updates jobs, job categories, and job customers based on the Long Name, Category Name, and Customer Name respectively. Therefore, you can not update these fields using this feature. Categories and customers listed in a Job import file will automatically be created if they do not exist.

Piecework

Piecework:

Permissions: Piecework
Using the left pane Main Menu, click on: Piecework->Piecework
Piecework Overview

The TimeIPS Piecework system is used to track pay for empolyees that is not based on time worked. Examples include:

- Piecework - For example, each completed widget pays $10
- Tips - For example, additional pay for work done
- Non-discretionary/performance Bonus - For example, additional pay for hitting goals or performance.
- Discretionary Bonus - For example, additional pay for any reason not directly related to the work or performance of the employee

Multiple types of piecework can be configured in the system. They can be given names, descriptions and optional additional fields to help with tracking and accounting.

Each piecework type can have pay rates set, with overrides per employee, if needed.

The employees allowed to work on each type of piecework can be restricted.

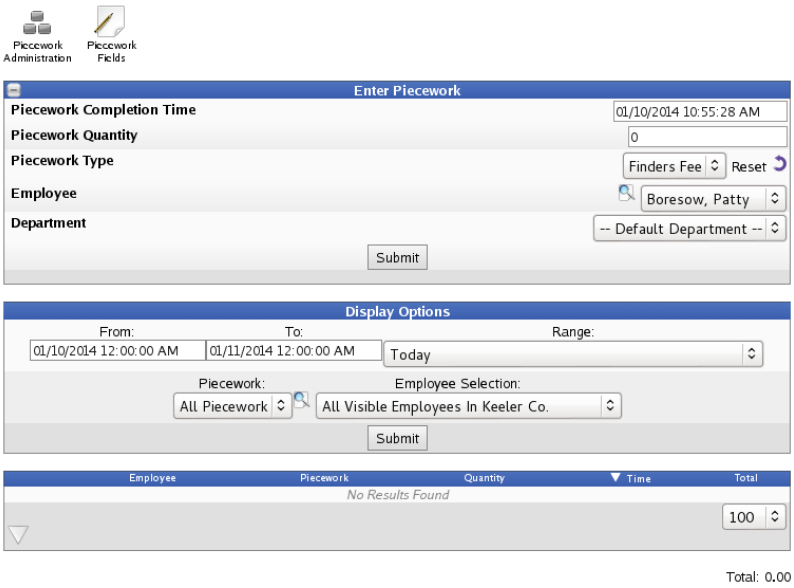
See Also:
Piecework Entry
Enter Pieces
Piecework Fields
Piecework Import/Export

Enter Piecework

Piecework events for employees can be entered on the Enter Piecework page. A piecework event is the completion of a number of piecework items by an employee at a certain time. The amount paid for the quantity entered depends on the value of the Pay Rate for that Piecework at the time it was entered. (The Pay Rate is set on the Piecework Admin page. See the Piecework Admin article for instructions.)

Using the left pane Main Menu » Administration, click on: Piecework » Enter Piecework

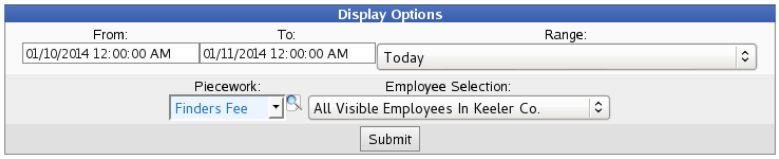
Enter Piecework



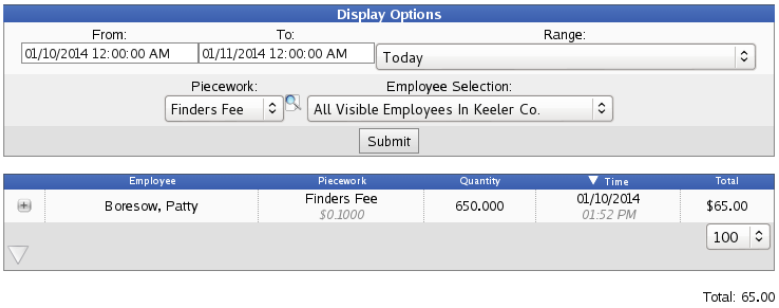
Enter New Piecework

- If the window is not already exapanded, click the **+** (plus) sign to the left of the **Enter Piecework** bar.
- Make your selectors from the following:
  - **Piecework Completion Time**: Choose the effective date and time of the piecework event by clicking in the field and selecting the date from the drop down calendar. To change the time, highlight the displayed time then type over it.
  - **Piecework Quantity**: Enter the number of piecework units for the event.
  - **Piecework Type**: From the drop down list, choose the type of picework to use.
  - Select the **Employee** that is associated with this piecework event. This list is limited by the type of piecework selected. Click the reset icon above to set this back to the full list.
  - Optionally, select the **Department** to associate with this piecework event.
- Click the **Submit** button to add the entry.

Display Options

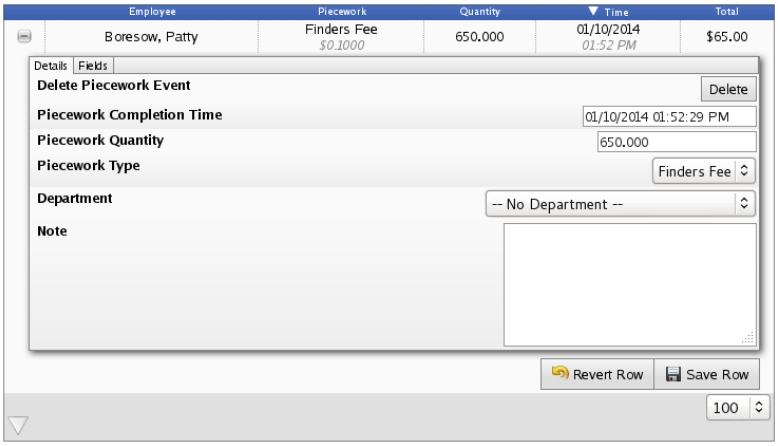


- **Piecework Completion Time:** Choose either a predefined or custom time range.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- From the drop down list, select the type of **Piecework** you want to use as a filter, otherwise leave it on "All Piecework".
- **Employee Selection.** Use this drop down list to filter which Employees you would like to see below. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.
- Click on the **Submit** button to view the results below.

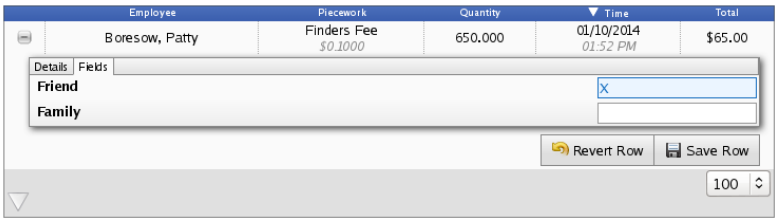


Edit Piecework Events

- Click the **+** (plus) sign to the left of the piecework event.



- Make any necessary changes or add an optional **Note**.
- From the Details tab, you can Delete the Piecework Event by clicking the **Delete** button.
- Click on the **Save Row** button to save the changes.

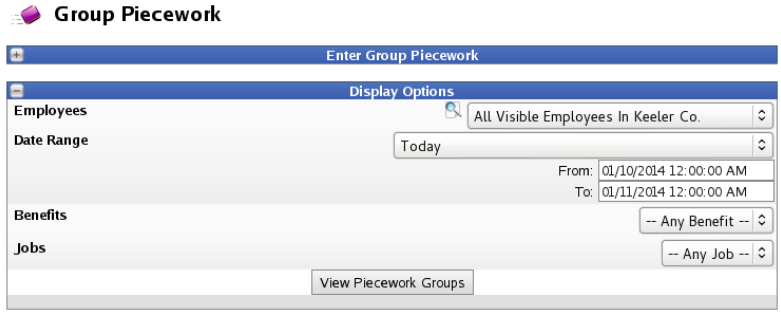


From the **Fields** tab, you can make selections or add notes to the fields you created on the Piecework Fields page. (See instructions in the Piecework Fields article.

Group Piecework

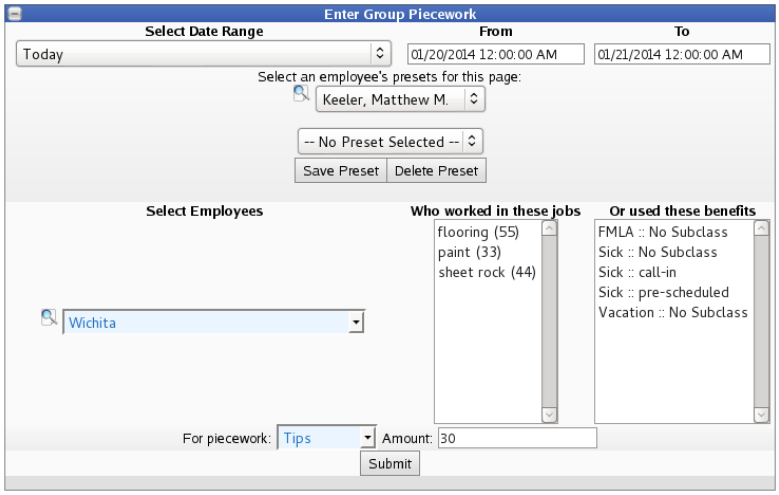
Group Piecework is used when compensation is needed for the labor of multiple employees. The amount is split among the group, based on hours worked by each individual, for example, a group of servers with pooled tips. To enter Group Piecework, you must have an appropriate Piecework type configured on the Piecework Administration Page.

Using the left pane Main Menu » Administration, click on: Piecework » Group Piecework



Enter Group Piecework

- Click the **+** (plus) sign to the left of the **Enter Group Piecework** bar to expand the window.

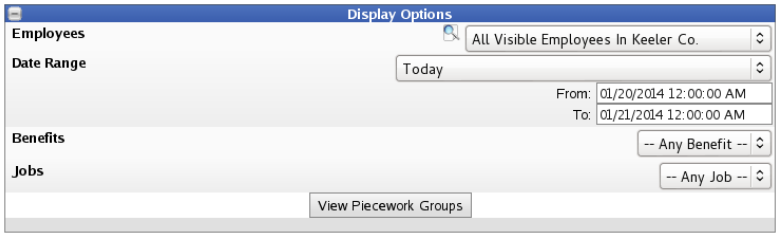


- **Select Date Range**: Choose either a predefined or custom time range.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- Optionally, **Select an employee's presets for this page**. Select the employee from the drop down list. From the next drop down list, select that employee's preset.

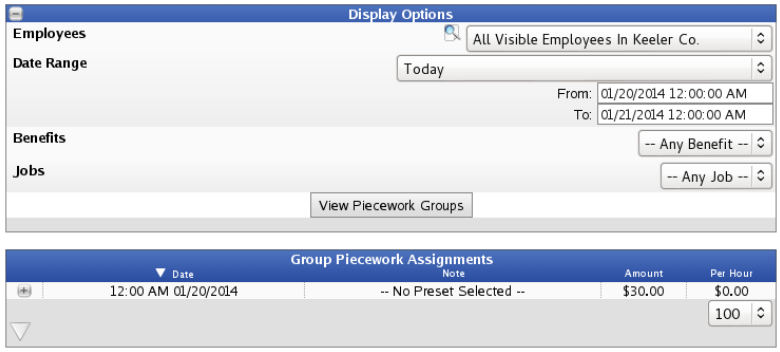
NOTE: A new preset can also be added by clicking the "Save Preset" button and saved as the default by clicking the "Make Default" button.

- From the **Select Employees** drop down list, select the Employee or group associated with this piecework event.
- **Who worked in these jobs:** Optionally, select the job(s) these employees worked in.
- **Or used these benefits**: Optionally, select the benefits these employees used.
- **For piecework**: From the drop down list, choose the type of picework to used.
- **Amount:** Enter the number of piecework units for the event
- Click the **Submit** button to add the entry.

Display Options

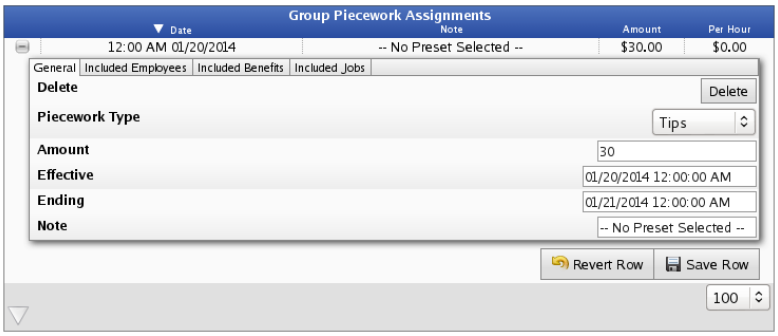


- **Employees.** Use this drop down list to filter which Employees you would like to see below. It works in conjunction with Employee Selection Groups, and your custom presets will appear in the list.
- **Date Range:** Choose either a predefined or custom time range.
  - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
  - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.
- Optionally, use this drop down list to filter the piecework events by **Benefit** type,
- Optionally, use this drop down list to filter the piecework events by **Jobs** worked,
- Click on the **View Piecework Groups** button to view the results below.



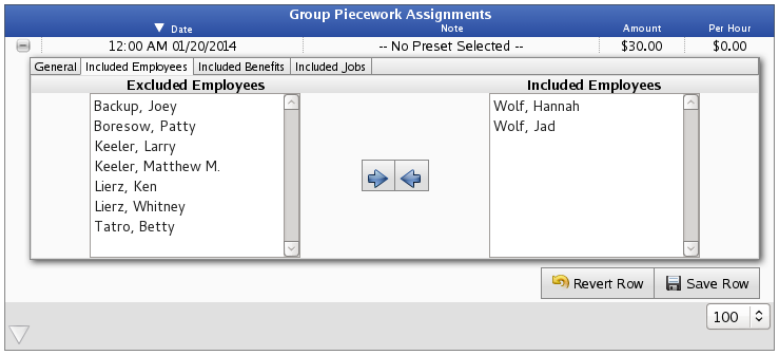
Edit or Delete Piecework Events

- Click the **+** (plus) sign to the left of the piecework event.

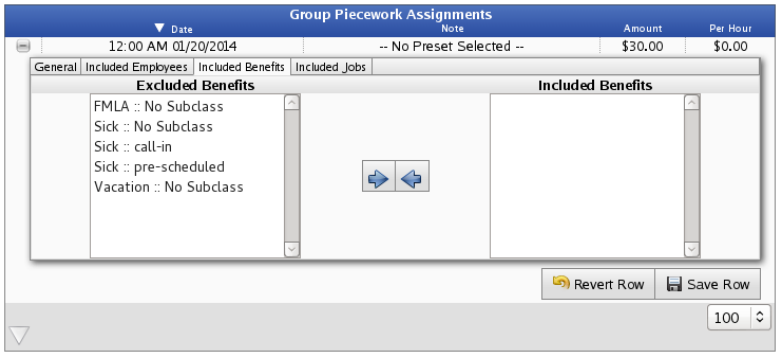


- From the General tab, you can Delete the Group Piecework Entry by clicking the **Delete** button.
- Make any necessary changes to the **Piecework Type**, **Amount**, **Effective** and/or **Ending** work/benefit time.
- Add or edit the optional **Note** by clicking in the box and begin typing.
- Click on the **Save Row** button to save the changes.

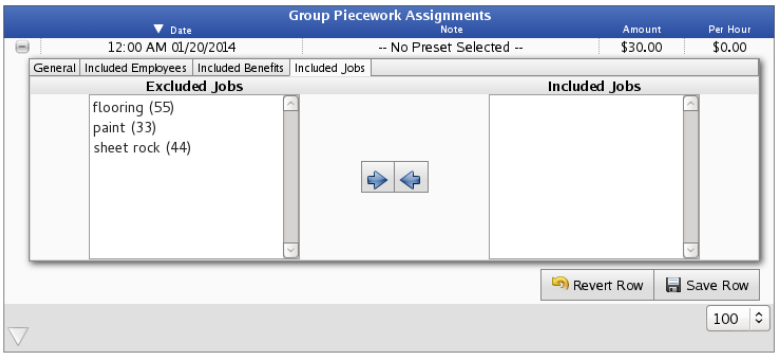
- From the **Included Employees** tab, you can highlight employees' names from the Excluded Employees list and click the arrow pointing right to include them. To exclude employees, click on those employees' names in the Included Employees list and click the arrow pointing left.



- From the **Included Benefits** tab, you can highlight benefits from the Excluded Benefits list and click the arrow pointing right to include them. To exclude benefits, click on those benefits in the Included Benefits list and click the arrow pointing left.



- From the **Included Jobs** tab, you can highlight jobs from the Excluded Jobs list and click the arrow pointing right to include them. To exclude jobs, click on those jobs in the Included Jobs list and click the arrow pointing left.



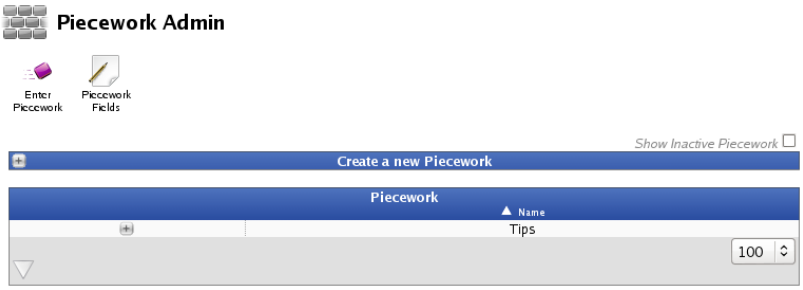
Piecework Admin

The TimeIPS Piecework system is used to track pay for empolyees that is not based on time worked, but instead tracks pieces that have been created, earned, or paid.

Examples include:
- *Pay-Per-Item Piecework - For example, each completed item (such as a garment, computer, etc) pays $10*
- *Pay-Per-Task Piecework - For example, each completed task (such as picking a bucket of berries) pays $15*
- *Tips - For example, additional pay for work done*
- *Non-Discretionary/Performance Bonus - For example, additional pay for hitting goals or performance, such as a Referral Bonus or Commissions.*
- *Discretionary Bonus - For example, additional pay for any reason not directly related to the work or performance of the employee.*

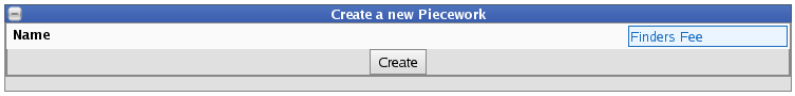
Using the left pane Main Menu » Administration, click on: Piecework » Piecework Admin

The Piecework Administration page allows configuring one or more types of piecework that will be used. Each type of piecework can have pay rates, employee membership, and associated piecework fields to help with tracking and accounting.



Add a New Type of Piecework

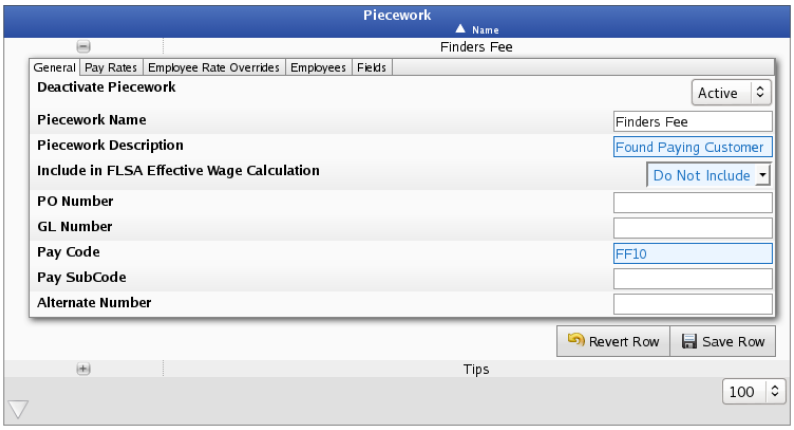
- Click the **+** (plus) sign to the left of the **Create a new Piecework** bar to expand the window.



- Add a descriptive **Name** and click the **Create** button.

Edit Piecework

- Click the **+** (plus) sign to the left of the piecework name and make edits on the tabs.



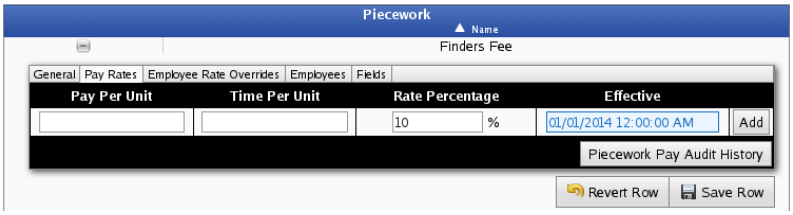
General

After naming and creating a new Piecework, the **General** options tab contains settings that can be used in references for payroll reports and custom reports.

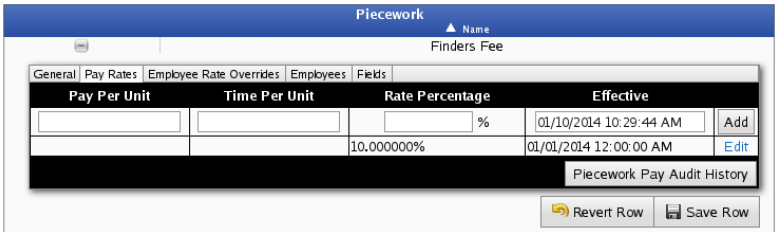
- **Deactivate Piecework**: Disables this Piecework from display or use.
- The **Piecework Name** can be edited.
- An optional **Piecework Description** can be added.
- Include in FLSA Effective Wage Calculation: Pay for this piecework should be included in the FLSA base pay in most cases. Expections include discretionary Bonuses.
- Add or edit the followiing optional numbers or codes used for Custom Reports/Payroll: **PO Number**, **GL Number**, **Pay Code**, **Pay SubCode**, and **Alternate Number**.

Pay Rates

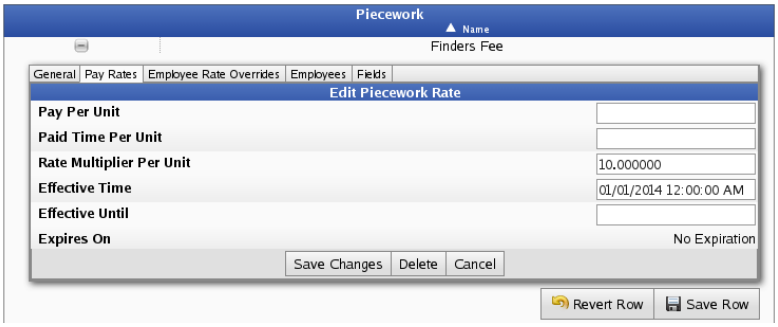
Pay for piecework is similar to job rates. The value of each unit of piecework done is configurable in the Pay Rates tab. Piecework pay Rates can be configured to be worth different amounts at different times.



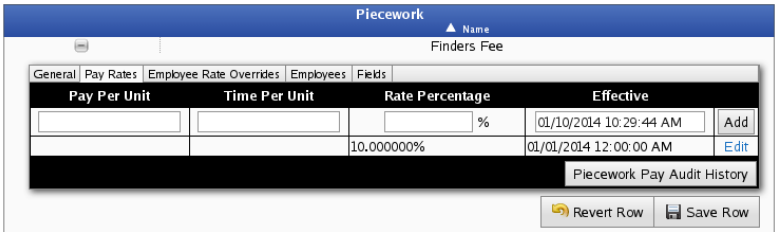
- To create a Pay Rate for the Piecework, first decide if it is going to be paid out **Per Unit**, **Time Per Unit**, or using a **Rate Percentage**, then enter in that value.
  - **Pay Per Unit** is the value or percentage of the Quantity entered on the Enter Piecework page. Examples: If the Pay Per Unit value is set to 25.00, then the employee earns $25 per unit (in this case, per referral). If the PPU is set to .10 then the emplloyee receives 10 cents per unit or if the Quantity is a dollar amount, they will receive 10% of that amount.
  - **Time Per Unit** is the amount of time paid per unit. Example: If the employee's hourly rate is $10 per hour and they complete 4 units (the Quantity entered on the Enter Piecework page), then the employee earns $40.
  - **Rate Percentage** is your specified percentage of either the employees hourly pay rate or annual salary. This percentarge is then multiplied by the Quantify entered on the Enter Piecework page. Example: If the piecework has a 10% Rate Percentage and the employee's hourly rate is $20 then the employee will receive 10% of $20 [.10 x 20 = 2] which is $2 per unit (aka Quantity) entered on the Enter Piecework page.
- Choose the **Effective** date by clicking in the field and selecting the date from the drop down calendar. To change the time, highlight the displayed time then type over it.
- Click the **Add** button.
- Click **Save Row** to save changes.



- Click on **Edit** to make changes, delete, or optionally set an expiration date.



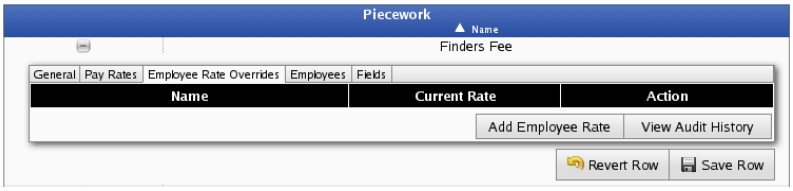
- After editing, click on the **Save Changes** button to save.
- To remove this Pay Rate, click on the **Delete** button.



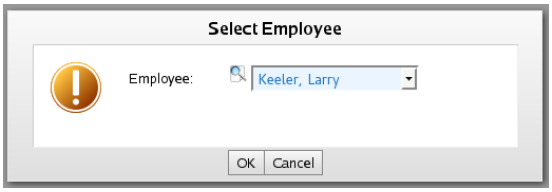
- To implement the Pay Rate, click the **Save Row** button.
- To see a list of creations and changes, click the **Piecework Pay Audit History** button.

Employee Rate Overrides

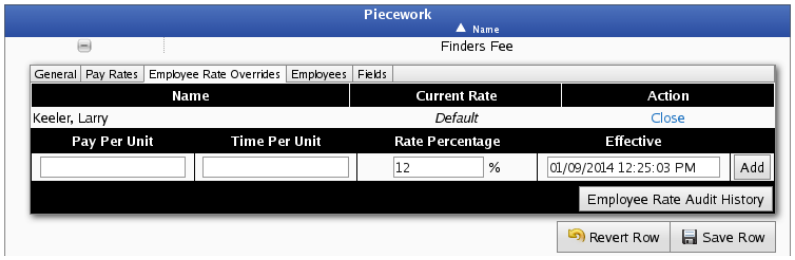
The Employee Rate Overrides tab allows you to create exceptions to the general rule. Individual employees can be paid differently for each unit of a given piecework.



- To create an override for an employee, click the **Add Employee Rate** button.

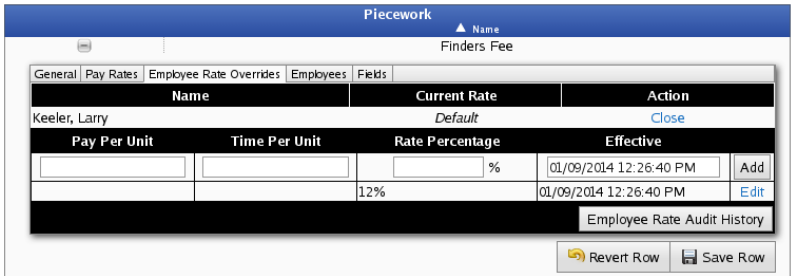


- Select the employee's name from the drop down list and click **OK**.

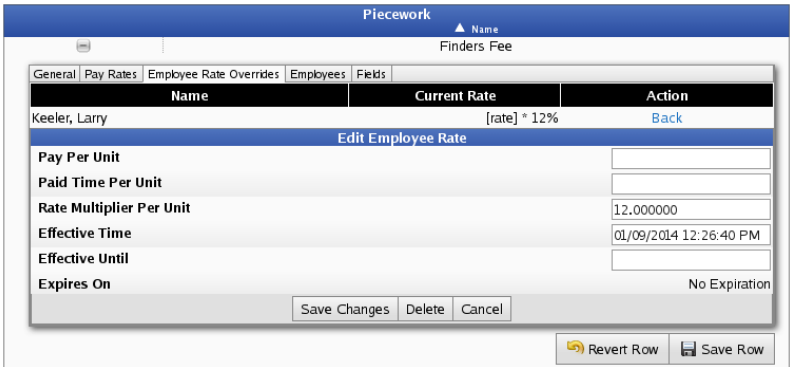


- Decide if this override is going to be paid out **Per Unit**, **Time Per Unit**, or using a **Rate Percentage**, then enter in that value.
  - **Pay Per Unit** is the value or percentage of the Quantity entered on the Enter Piecework page. Examples: If the Pay Per Unit value is set to 25.00, then the employee earns $25 per unit (in this case, per referral). If the PPU is set to .10 then the emplloyee receives 10 cents per unit or if the Quantity is a dollar amount, they will receive 10% of that amount.
  - **Time Per Unit** is the amount of time paid per unit. Example: If the employee's hourly rate is $10 per hour and they complete 4 units (the Quantity entered on the Enter Piecework page), then the employee earns $40.
  - **Rate Percentage** is your specified percentage of either the employees hourly pay rate or annual salary. This percentarge is then multiplied by the Quantify entered on the Enter Piecework page. Example: If the piecework has a 10% Rate Percentage and the employee's hourly rate is $20 then the employee will receive 10% of $20 [.10 x 20 = 2] which is $2 per unit (aka Quantity) entered on the Enter Piecework page.
- Choose the **Effective** date by clicking in the field and selecting the date from the drop down calendar. To change the time, highlight the displayed time then type over it.
- Click the **Add** button

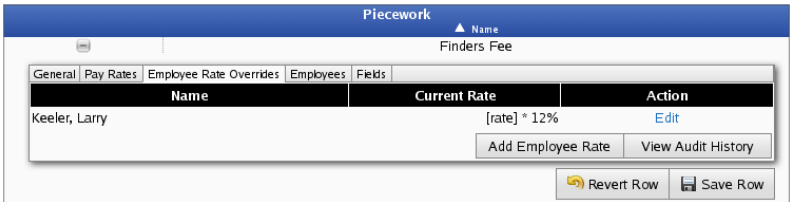
- Click **Save Row** to save changes.



- Click on **Edit** to make changes, delete, or optionally set an expiration date.



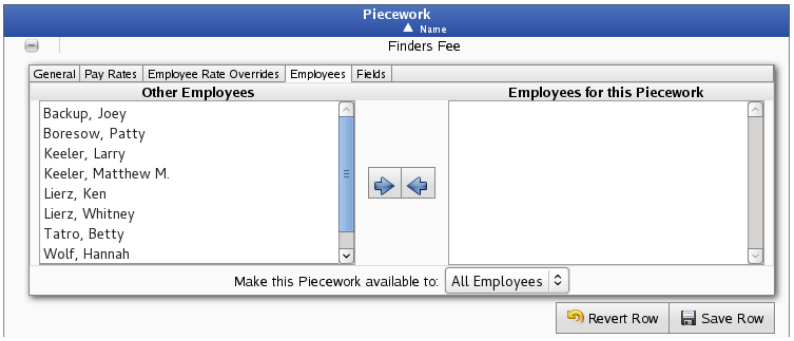
- After editing, click on the **Save Changes** button to save.
- To remove this override, click on the **Delete** button.



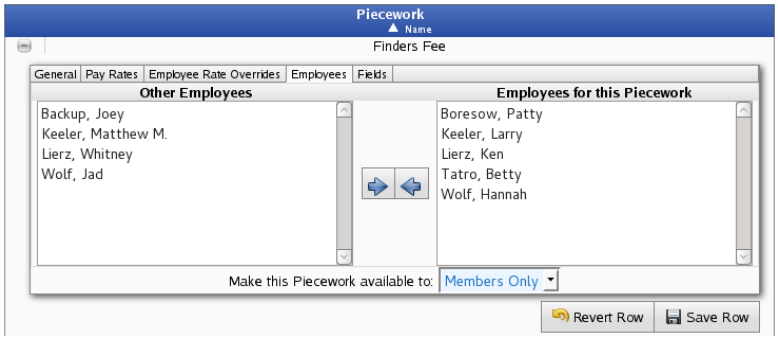
- To implement the Override, click the **Save Row** button.
- To see a list of creations and changes, click the **View Audit History** button.

Employees

The Employees tab allows for giving employees explicit access to enter pieces of that type. The employees allowed to work on each type of piecework can be restricted.



In the example above, the Piecework is available to **All Employees**.



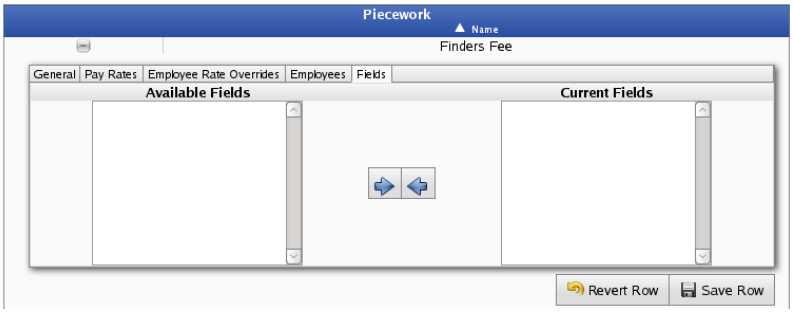
- To restrict employee access to the piecework, choose to **Make this Piecework availabe to:** "Members Only".
- Then add employees by clicking on the employees name in the left column labeled **Other Employees**, and click the blue arrow pointing to the right. The employee's name will then appear in the right column labeled **Employees for this Piecework**.

TIP: To select multiple employees, hold down the Ctrl key while clicking on employees' names.

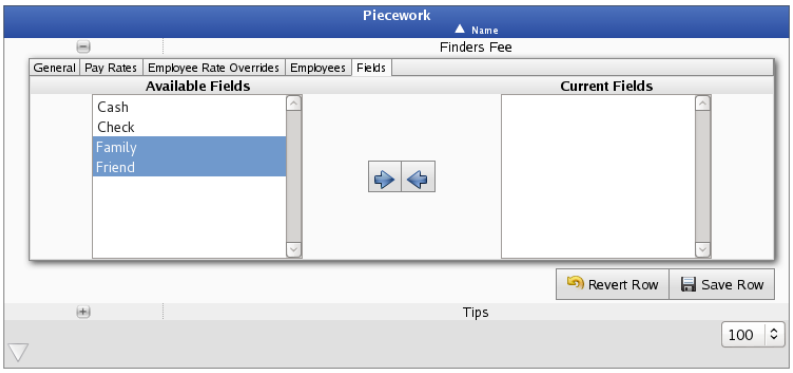
- Click **Save Row** to save changes.

Fields

The Fields tab allows assigning field labels to piecework. Piecework Fields are notes supplied when pieces are entered, and these notes can be included in custom reports to help with tracking and accounting.

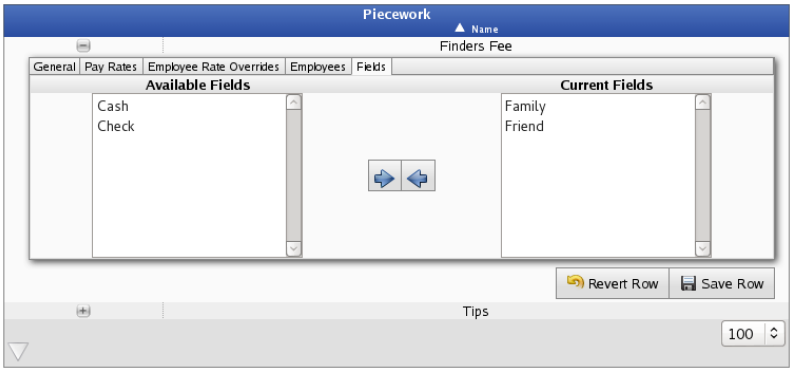


To create new fields, go to Piecework » Piecework Fields and see instructsions in the Piecework Fields article.



- To associate a field to this piecework, click on the field name in the left column labeled **Available Fields**, then click the blue arrow pointing to the right. The field name will then appear in the right column labeled **Current Fields**.

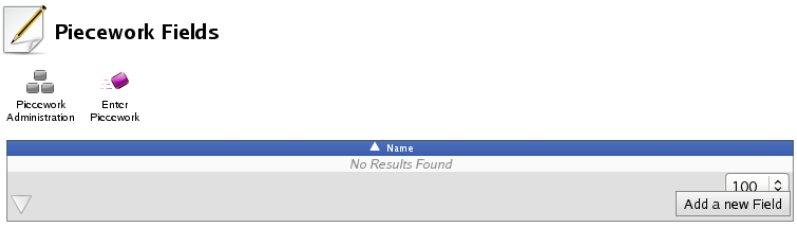
TIP: To select multiple fields, hold down the Ctrl key while clicking on field names.



Piecework Fields

One or more Piecework Fields can be created to allow piecework entries to have additional fields to track notes or other details about the piecework completed. From this page, the fields can be added or edtied and will then appear on the Fields tab of the Piecework Administration page.

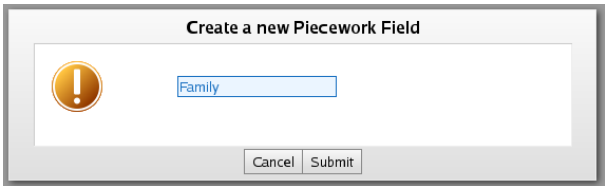
Using the left pane Main Menu » Administration, click on: Piecework » Piecework Fields



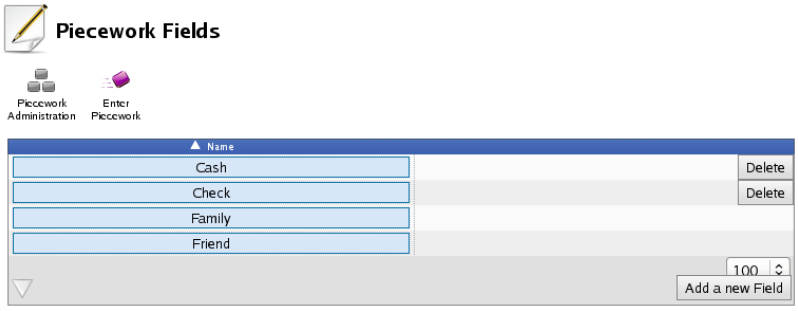
Add Fields

For example, Referral piecework could have fields to track sources of the referrals, such as family or friends.

- Click on the **Add a new Field** button.



- Type in a descriptive Name and click the **Submit** button.



- To edit the field name, click on it and make the changes.

NOTE: Once the field has been selected in a piecework entry, it can no longer be deleted.

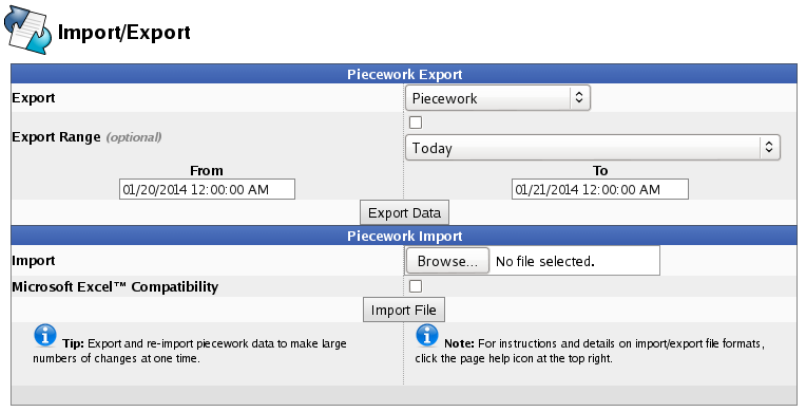
Piecework Import/Export

Piecework Import/Export provides you the option to export piecework data to a spreadsheet file. The data can then optionally be edited and imported back into the system. This is useful to make large numbers of changes at one time.

The following import and export instructions are available for review.

- Piecework
- Piecework Event Entries
- Piecework Pay Rates
- Piecework Membership

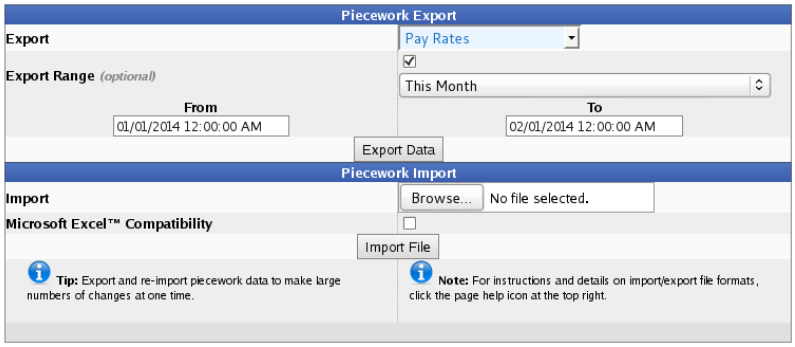
Using the left pane Main Menu » Administration, click on: Piecework » Import/Export



Export

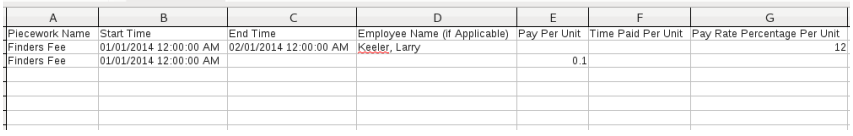
By exporting Piecework, Piecework Event Entries, Pay Rates, or Membership, you create a template file to either fill in the necessary information or rename the field labels in your existing spreadsheet of information.

1. Export the information to create a template.
   - Select the type of data to Export: Piecework, Piecework Event Entries, Pay Rates, or Membership.
   - Optionally, select the **Export Range**. To filter the results by date, check the box then choose either a predefined or custom time range.
     - Use the drop down menu to select a **predefined range**, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
     - You can also select a **custom date range** using the **From** and **To** fields. Click on the field to display a calendar and then select the date. This field can also be edited in place so just click in the box and type over the displayed date and time.



   - Click on the **Export Data** button.

TIP: To edit the resulting .csv file, we recommend a spreadsheet application such as Excel™ or OpenOffice Calc.



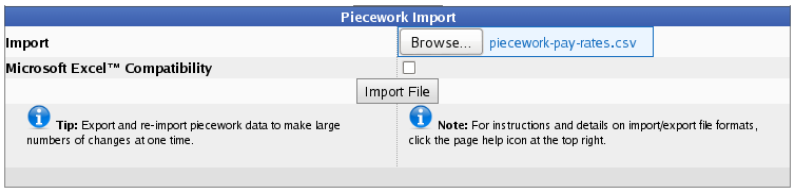
	A	B	C	D	E	F	G
1	Piecework Name	Start Time	End Time	Employee Name (if Applicable)	Pay Per Unit	Time Paid Per Unit	Pay Rate Percentage Per Unit
2	Finders Fee	01/01/2014 12:00:00 AM	02/01/2014 12:00:00 AM	Keeler, Larry			12
3	Finders Fee	01/01/2014 12:00:00 AM			0.1		
4							
5							
6							
7							

2. Adjust the spreadsheet as necessary.
   - If you already have a spreadsheet of the information you wish to import, open your existing spreadsheet and manipulate the column headers to match the field labels in the template you created in step 1.
   - If you do not already have a spreadsheet of the information you wish to import, enter the information into the template file you created in step 1.
3. Save the spreadsheet file of the information you wish to import as a Comma Separated (CSV) file.
4. Import the Information into TimeIPS.
   - If you make changes to the .csv file and would like those changes to take effect in TimeIPS®, use the "Piecework Import" function below.

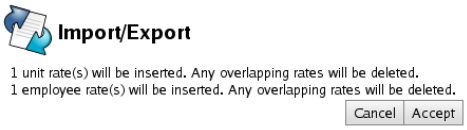
Import

Use the Import feature when there are a large number of changes that need to be made at one time. If you wish to create your own file instead of using an exported template, view the detailed Piecework, Piecework Event Entries, Piecework Pay Rates, and Piecework Membership instructions page.

1. Once the file is created, click on the **Browse** button and navigate to the CSV file to be imported.



2. Check the **MIcrosoft Excel Compatibility** box if you are using Microsoft Excel to modify the import file and you receive errors about "incorrect number of columns".
3. Click on the **Import** button.

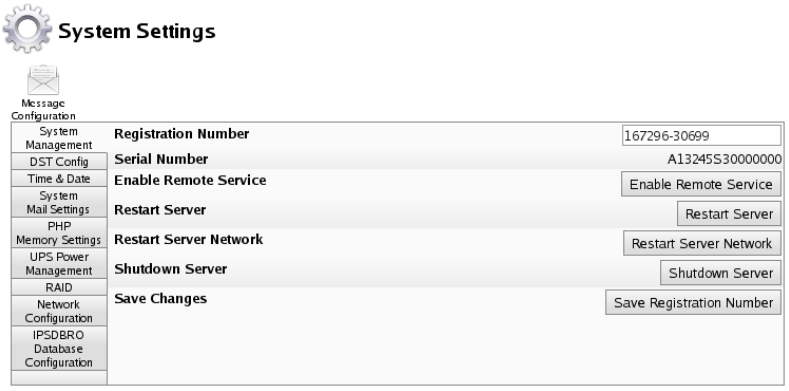


4. To continue with the import, click the **Accept** button. To abort the import, click on the **Cancel** button.

System Settings

The System Settings page lists the configuration settings for core components of your TimeIPS® Server. This includes System Management, Time/Date Configuration, Mail Settings, Memory Settings, and Remote Database Configuration.

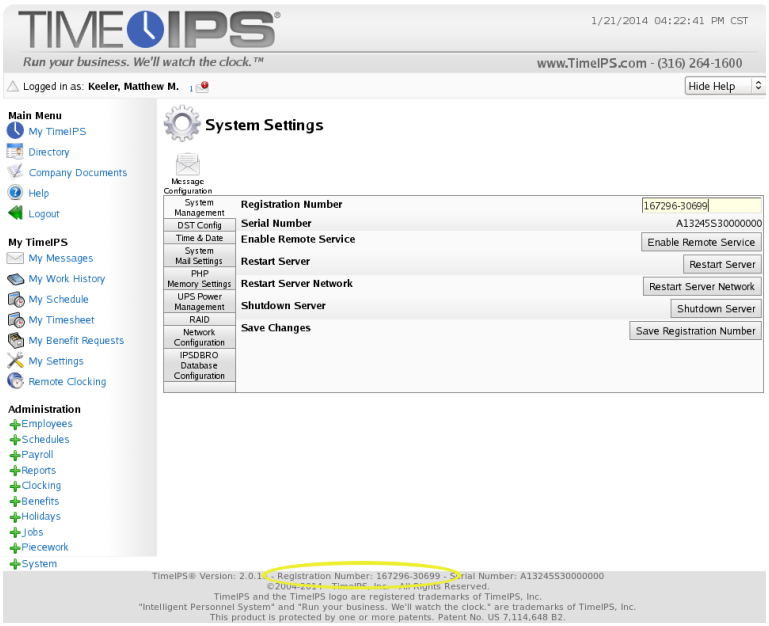
Using the left pane Main Menu » Administration, click on: System » System Settings



System Management

You can Enable Remote Service, Restart your master TimeIPS station, Restart the networking, and Shutdown your TimeIPS station for maintenance or moving.

- If the Registration Number is blank, enter in your **Registration Number** and/or Customer ID. After saving this change, it will appear in the footer of your TimeIPS system.



- Some troubleshooting procedures may require a TimeIPS support representative to access your TimeIPS® system. If directed by a TimeIPS support representative, click the **Enable Remote Service** button to access the Remote Service Authorization page.
- Click the **Restart Server** button to restart your TimeIPS® server. Please wait 4-5 minutes for a full restart to finish. TimeIPS will be unavailable during this time.

NOTE: The RESTART SERVER button is a complete power cycle whereas the RESTART SERVER NETWORK button restarts only the networking component of the server.

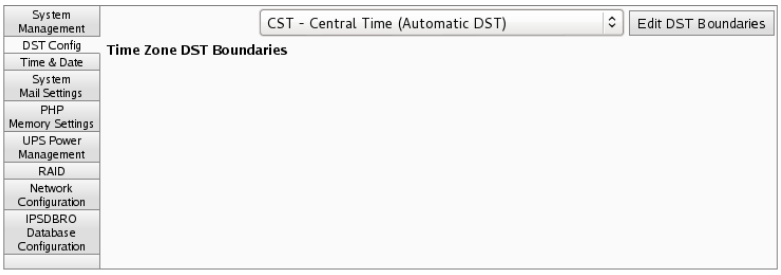
- Click the **Restart Server Network** button to restart the TimeIPS® server's network. Please wait 2-3 minutes for a network restart to finish. TimeIPS may be briefly unavailable.
- If you need to move or completely turn off power to the TimeIPS Server, click on the **Shutdown Server** button. Please wait 3-4 minutes for the system shutdown to complete. When the fan on the back of the TimeIPS system stops, the shutdown is complete, and the power cord can safely be removed.

NOTE: If you have multiple TimeIPS stations, the clock stations can be shut down and restarted from their respective IP address links in Clock Configuration.

- Click the **Save Registration Number** button to save your changes.

DST Config

Modify DST Boundaries for Time Zones.



- If your company, any employees or divisions are in a time zone that observes Daylight Saving Time, select the time zone from the drop down list and click **Edit DST Boundaries** to view the dates when DST starts and stops each year.

Daylight Saving/Summer Time Administration

Back

Daylight Saving/Summer Time (DST) Boundary Dates for CST

The table below shows the date and time when DST begins and ends for the selected time zone in past, present and future years.

- To add an additional DST period, enter a date and time in the "DST Begins" column (in Standard Time) and a date and time in the "DST Ends" column (in Daylight Saving/Summer Time). Then click "Add New".
- The "Time saved" column represents the amount of time clocks are shifted when entering or exiting DST. This is normally 60 minutes (1 hour).
- To edit a DST period simply click on the appropriate item to put the row into edit mode. Hit "Esc" or click "Cancel" to cancel the edit, or hit "Enter" or click "Edit" to commit the changes.
- Although changes made on this page take effect immediately and retroactively, the actual time worked (elapsed time) never changes.
- If you would like to reset all your DST boundary dates, click to erase all changes and reset to defaults.

DST Begins	DST Ends	Time saved	
Apr 1, 2014 2:00 AM	Oct 30, 2014 2:00 AM	60 min	Add New
Apr 05, 1987 02:00 AM CST	Oct 25, 1987 02:00 AM CDT	60 Minutes	Delete
Apr 03, 1988 02:00 AM CST	Oct 30, 1988 02:00 AM CDT	60 Minutes	Delete
Apr 02, 1989 02:00 AM CST	Oct 29, 1989 02:00 AM CDT	60 Minutes	Delete
Apr 01, 1990 02:00 AM CST	Oct 28, 1990 02:00 AM CDT	60 Minutes	Delete
Apr 07, 1991 02:00 AM CST	Oct 27, 1991 02:00 AM CDT	60 Minutes	Delete
Apr 05, 1992 02:00 AM CST	Oct 25, 1992 02:00 AM CDT	60 Minutes	Delete
Apr 04, 1993 02:00 AM CST	Oct 31, 1993 02:00 AM CDT	60 Minutes	Delete
Apr 03, 1994 02:00 AM CST	Oct 30, 1994 02:00 AM CDT	60 Minutes	Delete
Apr 02, 1995 02:00 AM CST	Oct 29, 1995 02:00 AM CDT	60 Minutes	Delete
Apr 07, 1996 02:00 AM CST	Oct 27, 1996 02:00 AM CDT	60 Minutes	Delete
Apr 06, 1997 02:00 AM CST	Oct 26, 1997 02:00 AM CDT	60 Minutes	Delete
Apr 05, 1998 02:00 AM CST	Oct 25, 1998 02:00 AM CDT	60 Minutes	Delete
Apr 04, 1999 02:00 AM CST	Oct 31, 1999 02:00 AM CDT	60 Minutes	Delete
Apr 02, 2000 02:00 AM CST	Oct 29, 2000 02:00 AM CDT	60 Minutes	Delete
Apr 01, 2001 02:00 AM CST	Oct 28, 2001 02:00 AM CDT	60 Minutes	Delete
Apr 07, 2002 02:00 AM CST	Oct 27, 2002 02:00 AM CDT	60 Minutes	Delete
Apr 06, 2003 02:00 AM CST	Oct 26, 2003 02:00 AM CDT	60 Minutes	Delete
Apr 04, 2004 02:00 AM CST	Oct 31, 2004 02:00 AM CDT	60 Minutes	Delete
Apr 03, 2005 02:00 AM CST	Oct 30, 2005 02:00 AM CDT	60 Minutes	Delete
Apr 02, 2006 02:00 AM CST	Oct 29, 2006 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2007 02:00 AM CST	Nov 04, 2007 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2008 02:00 AM CST	Nov 02, 2008 02:00 AM CDT	60 Minutes	Delete
Mar 08, 2009 02:00 AM CST	Nov 01, 2009 02:00 AM CDT	60 Minutes	Delete
Mar 14, 2010 02:00 AM CST	Nov 07, 2010 02:00 AM CDT	60 Minutes	Delete
Mar 13, 2011 02:00 AM CST	Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2012 02:00 AM CST	Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Mar 10, 2013 02:00 AM CST	Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2014 02:00 AM CST	Nov 02, 2014 02:00 AM CDT	60 Minutes	Delete
Mar 08, 2015 02:00 AM CST	Nov 01, 2015 02:00 AM CDT	60 Minutes	Delete

- To add an additional DST period, go to the top of the list then enter a date and time in the **DST Begins** column (in Standard Time) and a date and time in the **DST Ends** column (in Daylight Saving/Summer Time).
- Enter an amount of time in the **Time saved** column. This represents the amount of time clocks are shifted when entering or exiting DST, which is normally 60 minutes (1 hour).
- Then click the **Add New** button.

Mar 13, 2011 02:00 AM CST	Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2012 02:00 AM CST	Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Mar 10, 2013 02:00 AM CST	Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2014 02:00 AM	Nov 02, 2014 02:00 AM	60 min	Edit Cancel
Mar 08, 2015 02:00 AM CST	Nov 01, 2015 02:00 AM CDT	60 Minutes	Delete
Mar 13, 2016 02:00 AM CST	Nov 06, 2016 02:00 AM CDT	60 Minutes	Delete

- To edit a DST period, simply click on the appropriate item to put the row into edit mode. Hit "Esc" or click **Cancel** to cancel the edit, or hit "Enter" or click **Edit** to commit the changes.

Time & Date

System Management
DST Config
Time & Date
System Mail Settings
PHP Memory Settings
UPS Power Management
RAID
Network Configuration
IPSDBRO Database Configuration

Use NTP Server	NTP is Running Use NTP
Force NTP Service Restart	Force Restart
NTP Server Address	192.168.168.201
System Time	02/06/2014 02:36:14 PM
Restart NTP Service	Restart NTP Service
Save Changes	Apply Changes

- Check the **Use NTP** box to enable automatic time synchronization.

NOTE: Using NTP for time synchronization on your TimeIPS® Server is recommended.

- On some VM systems, the NTP service can still lose significant time. To combat this, you can force a restart of the NTP service every 10 minutes by checking the **Force Restart** box.
- Enter the **NTP Server Address** you wish to synchronize to. (Recommended: ntp.timeips.com) By using Automatic Time Synchronization, your TimeIPS Station will automatically connect and synchronize its time to an NTP server. This is highly recommended because an unsynchronized local clock will drift, eventually resulting in incorrect times. Using this option requires an Internet connection or an NTP server available on your local network. If you have a firewall, be sure that port 123 is not blocked.
- **System Time**: Set the date and time of your TimeIPS® Server's internal clock.

Manually setting the time on your TimeIPS® Server is NOT generally recommended.

If you do not have an Internet connection or an NTP server on your local network, you will need to use the local clock option. In this case we recommend checking the time at least once a week and adjusting as needed.

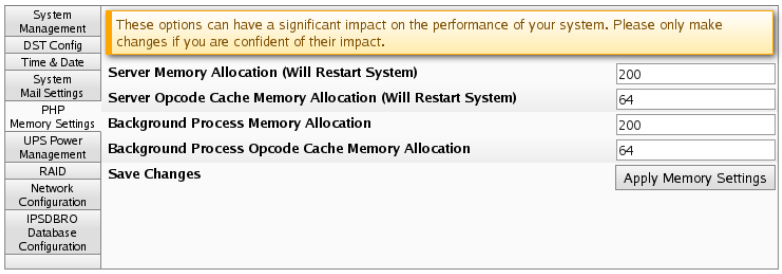
- Click the **Restart NTP Service** button to manually perform a one time restart of the NTP server.
- Click the **Apply Changes** button to save your changes.

System Mail Settings

- **Mail Server**: Enter the outgoing SMTP server you would like the TimeIPS® System to send mail through. The default port is 25; use "server:port" to specify a different port.
- **Email Link Configuration**: Some outgoing email will contain links pointing back to specific pages on this server. If email is always accessed from inside your network, select **Internal IP Address**. If email is accessed from outside your network, and/or you have a router/firewall with port forwarding configured, select **Domain Name** and set the domain name under Company/Divisions->URL tab. NOTE: Some router/firewall configurations do not allow internal access to an external IP with port forwarding. If this is the case for you, **Domain Name** links will NOT work inside your network. In this case, select **Provide Both Links**.
- **Email Link Port Number**: If you use port forwarding to redirect external requests to your TimeIPS® Server, set the port here so that links in E-Mails sent by this system will route properly.
- Many mail servers require that SSL be used to send messages. Check the **Secure Sockets** box if your mail server requires that the TimeIPS® system use SMTP over SSL. Do not check this box if your mail server needs to use STARTTLS; support for STARTTLS will be automatically detected. Checking this box causes the port to default to 465.
- **Disable STARTTLS** : Some mail servers report that they have support for STARTTLS, but in fact do not. If you see messages in the "View Errors" link below indicating an inability to connect to server, try checking this option.
- Enter the **Username** to log into the SMTP server above. Contact your System Administrator or ISP for this information if needed.
- Enter the **Password** required to log into the SMTP server.
- Click the **Update Mail Settings** button to save your changes.

PHP Memory Settings

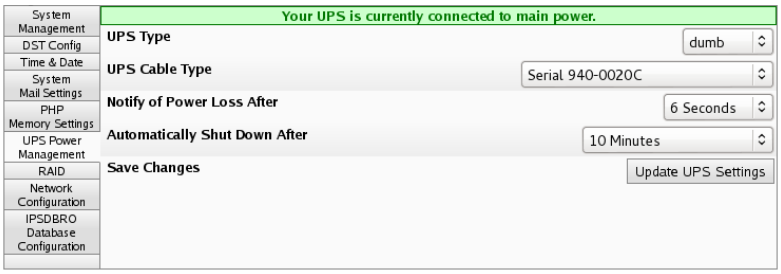
The PHP Memory Settings can have a significant impact on the performance of your system. Please only make changes if you are confident of their impact.



- **Server Memory Allocation (Will Restart System)**: Specify the amount of internal system memory PHP is allowed to use, in MB. For installations with a significant number of employees, increasing this value is recommended. The valid range is 50 up to 231
- **Server Opcode Cache Memory Allocation (Will Restart System)**: Specify the amount of internal system memory that the PHP Opcode Cache is allowed to use, in MB. The amount of memory needed for the Opcode Cache is static so changing this value may decrease system performance. The valid range is 32 up to 77
- **Background Process Memory Allocation**: Specify the amount of internal system memory PHP is allowed to use when running background processes, in MB. For installations with a significant number of employees that run large or lengthy reports, increasing this value is recommended. The valid range is 50 up to 231
- **Background Process Opcode Cache Memory Allocation**: Specify the amount of internal system memory that the PHP Opcode Cache is allowed to use when running background processes, in MB. The amount of memory needed for the Opcode Cache is static so changing this value may decrease system performance. The valid range is 32 up to 77
- Click the **Apply Memory Settings** button to save your changes.

UPS Power Management

TimeIPS supports graceful shut down with APC brand Uninterruptible Power Supply (UPS) battery backup devices. Most APC brand SmartUPS and BackUPS devices are supported. The Intelligent Personnel System Upgrade (IPSIPS) module is required.



1. Plug TimeIPS into the UPS device once TimeIPS has been properly shut down.
   a. Shut down your TimeIPS system by clicking on the **Shutdown Server** button in the System Management tab of the page.

   NOTE: Wait until the system completely shuts down, indicated by the small LCD display turning off.

   b. Unplug the power cord from the wall and wait at least 60 seconds.
   c. Plug the power cord into the UPS device and TimeIPS will restart.

   NOTE: If TimeIPS does not start the boot process after plugging the power cord into the UPS device, unplug the power cord and wait at least 60 seconds so the power can drain completely from the motherboard and reset capacitor.

   d. Once TimeIPS has completed booting back up, which may take up to 5 minutes, login and return to the System Settings page.
2. Select the **UPS Cable Type, Notify of Power Loss after** time frame, and **Automatically Shut Down** time frame in the pull-downs.
   - **UPS Cable Type** pull-down includes all supported APC brand cable model numbers.

     NOTE: Be sure to indicate the exact model number found on the cable.

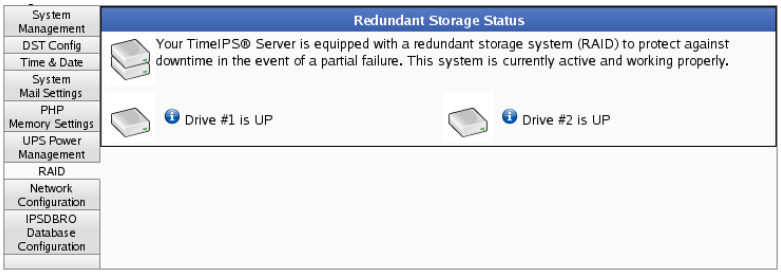
   - **Notify of Power Loss After** pull-down indicates when TimeIPS will notify all employees with System Administrator security of the power loss via email and through the TimeIPS My Messages section.
   - **Automatically shut down** indicates when TimeIPS should be shut down after power loss.

     Note: The "When the battery is low" setting does not work with the 940-0020B or 940-0023A cables. All other devices will automatically shut the TimeIPS system down when the battery is low or when the "Automatically shut down" time has elapsed, whichever comes first.

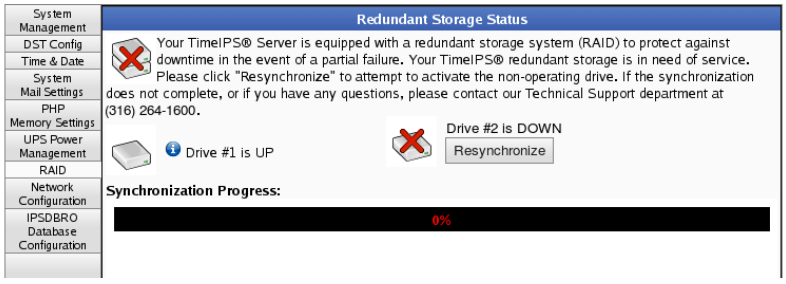
3. Click on the **Update UPS Settings** button to save the changes.

RAID

The Redundant Storage Status section shows the current status of the Redundant Storage hard drives.



If TimeIPS detects a non-operating hard drive on a redundant storage system, the **System Message Sender E-mail** will be alerted via email. You should first attempt to resynchronize the hard drive by clicking on the **Resynchronize** button as shown below. If the resynchronization does not complete, please contact TimeIPS technical support for assistance.



Network Configuration

TimeIPS initially uses DHCP (Dynamic Host Configuration Protocol) to automatically gain an IP address from your network during setup. Once your TimeIPS system has been configured, you need to assign it a static, or never changing, IP address for easy access to your TimeIPS system.

1. Check the **Confirm Network Change** check box.

   NOTE: If you are adjusting the Addressing Method, IP Address, Subnet Mast, or Default Gateway and the Addressing is currently STATIC, you first need to check the Confirm Network Change checkbox.

2. Enter/Adjust the **Addressing Method, IP Address, Subnet Mast, Default Gateway, DNS Servers**, and **Clock Access Port** information as necessary.
   - Use the **Static Addressing Method** whenever possible. Ask your network administrator what **IP Address, Subnet Mask**, and **Default Gateway** used on your network or, if your TimeIPS system is connected directly to your computer, you may set the automatically attained settings to static.
   - A **DNS** (Domain Name System) **Server** translates domain names, such as demo.timeips.com, into its IP address, such as 192.168.1.225.
   - If you need your TimeIPS clock stations to access the TimeIPS master station through a nonstandard port, for instance due to network policy restrictions, enter a **Clock Access Port** number between 1 and 65535 here.
3. Click on the **Update Network Configuration** button to save the changes or any link in the left pane Main Menu to leave the page without applying the changes.

Setting Static Routes (Routing Table)

For advanced networks, TimeIPS can be configured with static routes. This can be done on TimeIPS master or client systems by browsing to http://{ip address of TimeIPS}/staticRoutes.php

IPSDBRO Database Configuration

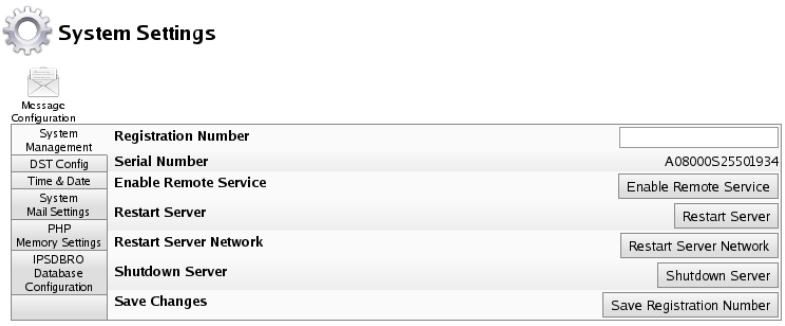
- The **Limited Remote Database Username** is the username used for remote database access such as from an ODBC-compliant application. This user is used primarily for read-only access.
- The **Limited Remote Database Password** must be between 8 and 16 characters long (inclusive). Leave blank unless changing password.
- Confirm the **Limited Remote Database Password** by typing it a second time.
- Click the **Update Database Configuration** button to save your changes.

See Also:
Enable Remote Service
Restarting/Shutting Down TimeIPS
TimeIPS Server DST Configuration
Adjusting Time/Date Settings
Adjusting SMTP Mail Settings
PHP Memory Settings
System Settings
IPSDBBRO Database Configuration

ASP System Settings

The System Settings page lists the configuration settings for core components of your TimeIPS® Server. This includes System Management, Time/Date Configuration, Mail Settings, Memory Settings, and Remote Database Configuration.

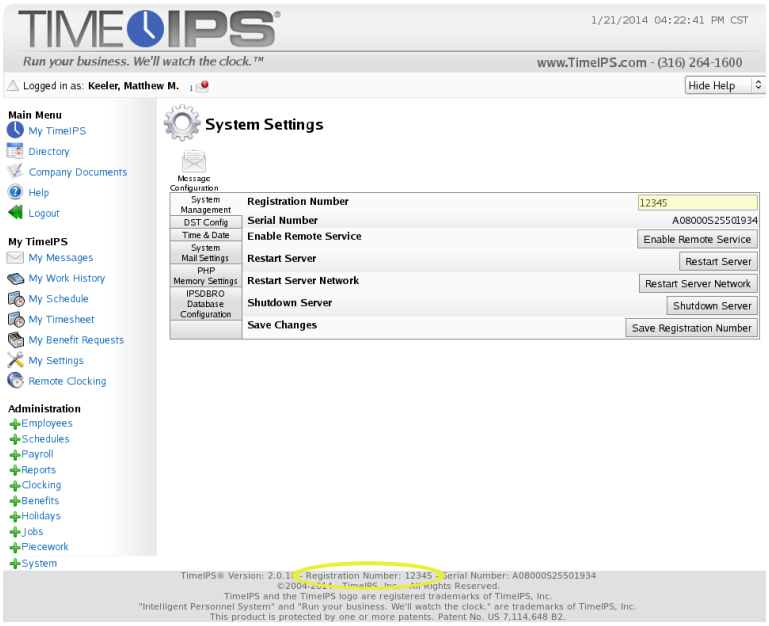
Using the left pane Main Menu » Administration, click on: System » System Settings



System Management

You can Enable Remote Service, Restart your master TimeIPS station, Restart the networking, and Shutdown your TimeIPS station for maintenance or moving.

- If the Registration Number is blank, enter in your **Registration Number** and/or Customer ID. After saving this change, it will appear in the footer of your TimeIPS system.



- Some troubleshooting procedures may require a TimeIPS support representative to access your TimeIPS® system. If directed by a TimeIPS support representative, click the **Enable Remote Service** button to access the Remote Service Authorization page.
- Click the **Restart Server** button to restart your TimeIPS® server. Please wait 4-5 minutes for a full restart to finish. TimeIPS will be unavailable during this time.

NOTE: The RESTART SERVER button is a complete power cycle whereas the RESTART SERVER NETWORK button restarts only the networking component of the server.

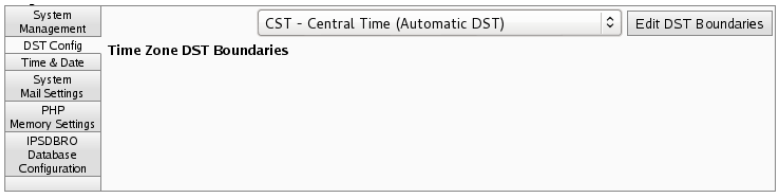
- Click the **Restart Server Network** button to restart the TimeIPS® server's network. Please wait 2-3 minutes for a network restart to finish. TimeIPS may be briefly unavailable.
- If you need to move or completely turn off power to the TimeIPS Server, click on the **Shutdown Server** button. Please wait 3-4 minutes for the system shutdown to complete. When the fan on the back of the TimeIPS system stops, the shutdown is complete, and the power cord can safely be removed.

NOTE: If you have multiple TimeIPS stations, the clock stations can be shut down and restarted from their respective IP address links in Clock Configuration.

- Click the **Save Registration Number** button to save your changes.

DST Config

Modify DST Boundaries for Time Zones.



- If your company, any employees or divisions are in a time zone that observes Daylight Saving Time, select the time zone from the drop down list and click **Edit DST Boundaries** to view the dates when DST starts and stops each year.

Daylight Saving/Summer Time Administration

Back

Daylight Saving/Summer Time (DST) Boundary Dates for CST

The table below shows the date and time when DST begins and ends for the selected time zone in past, present and future years.

- To add an additional DST period, enter a date and time in the "DST Begins" column (in Standard Time) and a date and time in the "DST Ends" column (in Daylight Saving/Summer Time). Then click "Add New".
- The "Time saved" column represents the amount of time clocks are shifted when entering or exiting DST. This is normally 60 minutes (1 hour).
- To edit a DST period simply click on the appropriate item to put the row into edit mode. Hit "Esc" or click "Cancel" to cancel the edit, or hit "Enter" or click "Edit" to commit the changes.
- Although changes made on this page take effect immediately and retroactively, the actual time worked (elapsed time) never changes.
- If you would like to reset all your DST boundary dates, click to erase all changes and reset to defaults.

DST Begins	DST Ends	Time saved	
Apr 1, 2014 2:00 AM	Oct 30, 2014 2:00 AM	60 min	Add New
Apr 05, 1987 02:00 AM CST	Oct 25, 1987 02:00 AM CDT	60 Minutes	Delete
Apr 03, 1988 02:00 AM CST	Oct 30, 1988 02:00 AM CDT	60 Minutes	Delete
Apr 02, 1989 02:00 AM CST	Oct 29, 1989 02:00 AM CDT	60 Minutes	Delete
Apr 01, 1990 02:00 AM CST	Oct 28, 1990 02:00 AM CDT	60 Minutes	Delete
Apr 07, 1991 02:00 AM CST	Oct 27, 1991 02:00 AM CDT	60 Minutes	Delete
Apr 05, 1992 02:00 AM CST	Oct 25, 1992 02:00 AM CDT	60 Minutes	Delete
Apr 04, 1993 02:00 AM CST	Oct 31, 1993 02:00 AM CDT	60 Minutes	Delete
Apr 03, 1994 02:00 AM CST	Oct 30, 1994 02:00 AM CDT	60 Minutes	Delete
Apr 02, 1995 02:00 AM CST	Oct 29, 1995 02:00 AM CDT	60 Minutes	Delete
Apr 07, 1996 02:00 AM CST	Oct 27, 1996 02:00 AM CDT	60 Minutes	Delete
Apr 06, 1997 02:00 AM CST	Oct 26, 1997 02:00 AM CDT	60 Minutes	Delete
Apr 05, 1998 02:00 AM CST	Oct 25, 1998 02:00 AM CDT	60 Minutes	Delete
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Apr 02, 2000 02:00 AM CST	Oct 29, 2000 02:00 AM CDT	60 Minutes	Delete
Apr 01, 2001 02:00 AM CST	Oct 28, 2001 02:00 AM CDT	60 Minutes	Delete
Apr 07, 2002 02:00 AM CST	Oct 27, 2002 02:00 AM CDT	60 Minutes	Delete
Apr 06, 2003 02:00 AM CST	Oct 26, 2003 02:00 AM CDT	60 Minutes	Delete
Apr 04, 2004 02:00 AM CST	Oct 31, 2004 02:00 AM CDT	60 Minutes	Delete
Apr 03, 2005 02:00 AM CST	Oct 30, 2005 02:00 AM CDT	60 Minutes	Delete
Apr 02, 2006 02:00 AM CST	Oct 29, 2006 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2007 02:00 AM CST	Nov 04, 2007 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2008 02:00 AM CST	Nov 02, 2008 02:00 AM CDT	60 Minutes	Delete
Mar 08, 2009 02:00 AM CST	Nov 01, 2009 02:00 AM CDT	60 Minutes	Delete
Mar 14, 2010 02:00 AM CST	Nov 07, 2010 02:00 AM CDT	60 Minutes	Delete
Mar 13, 2011 02:00 AM CST	Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2012 02:00 AM CST	Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Mar 10, 2013 02:00 AM CST	Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2014 02:00 AM CST	Nov 02, 2014 02:00 AM CDT	60 Minutes	Delete
Mar 08, 2015 02:00 AM CST	Nov 01, 2015 02:00 AM CDT	60 Minutes	Delete

- To add an additional DST period, go to the top of the list then enter a date and time in the **DST Begins** column (in Standard Time) and a date and time in the **DST Ends** column (in Daylight Saving/Summer Time).
- Enter an amount of time in the **Time saved** column. This represents the amount of time clocks are shifted when entering or exiting DST, which is normally 60 minutes (1 hour).
- Then click the **Add New** button.

Mar 13, 2011 02:00 AM CST	Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2012 02:00 AM CST	Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Mar 10, 2013 02:00 AM CST	Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2014 02:00 AM	Nov 02, 2014 02:00 AM	60 min	Edit Cancel
Mar 08, 2015 02:00 AM CST	Nov 01, 2015 02:00 AM CDT	60 Minutes	Delete
Mar 13, 2016 02:00 AM CST	Nov 06, 2016 02:00 AM CDT	60 Minutes	Delete

- To edit a DST period, simply click on the appropriate item to put the row into edit mode. Hit "Esc" or click **Cancel** to cancel the edit, or hit "Enter" or click **Edit** to commit the changes.

Time & Date

System Management
DST Config
Time & Date
System Mail Settings
PHP Memory Settings
IPSDBRO Database Configuration

Use NTP Server	NTP is Running Use NTP
Force NTP Service Restart	Force Restart
NTP Server Address	ntp.timeips.com
System Time	01/21/2014 12:12:49 PM
Restart NTP Service	Restart NTP Service
Save Changes	Apply Changes

- Check the **Use NTP** box to enable automatic time synchronization.

NOTE: Using NTP for time synchronization on your TimeIPS® Server is recommended.

- On some VM systems, the NTP service can still lose significant time. To combat this, you can force a restart of the NTP service every 10 minutes by checking the **Force Restart** box.
- Enter the **NTP Server Address** you wish to synchronize to. (Recommended: ntp.timeips.com) By using Automatic Time Synchronization, your TimeIPS Station will automatically connect and synchronize its time to an NTP server. This is highly recommended because an unsynchronized local clock will drift, eventually resulting in incorrect times. Using this option requires an Internet connection or an NTP server available on your local network. If you have a firewall, be sure that port 123 is not blocked.
- **System Time**: Set the date and time of your TimeIPS® Server's internal clock.

Manually setting the time on your TimeIPS® Server is NOT generally recommended.

If you do not have an Internet connection or an NTP server on your local network, you will need to use the local clock option. In this case we recommend checking the time at least once a week and adjusting as needed.

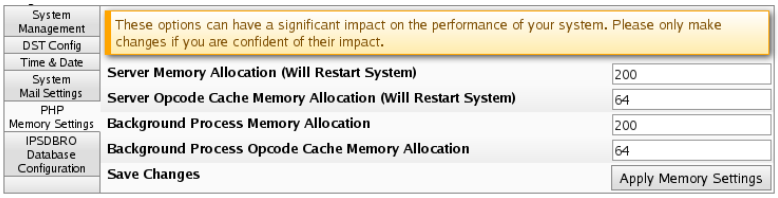
- Click the **Restart NTP Service** button to manually perform a one time restart of the NTP server.
- Click the **Apply Changes** button to save your changes.

System Mail Settings

- **Mail Server**: Enter the outgoing SMTP server you would like the TimeIPS® System to send mail through. The default port is 25; use "server:port" to specify a different port.
- **Email Link Configuration**: Some outgoing email will contain links pointing back to specific pages on this server. If email is always accessed from inside your network, select **Internal IP Address**. If email is accessed from outside your network, and/or you have a router/firewall with port forwarding configured, select **Domain Name** and set the domain name under Company/Divisions->URL tab. NOTE: Some router/firewall configurations do not allow internal access to an external IP with port forwarding. If this is the case for you, **Domain Name** links will NOT work inside your network. In this case, select **Provide Both Links**.
- **Email Link Port Number**: If you use port forwarding to redirect external requests to your TimeIPS® Server, set the port here so that links in E-Mails sent by this system will route properly.
- Many mail servers require that SSL be used to send messages. Check the **Secure Sockets** box if your mail server requires that the TimeIPS® system use SMTP over SSL. Do not check this box if your mail server needs to use STARTTLS; support for STARTTLS will be automatically detected. Checking this box causes the port to default to 465.
- **Disable STARTTLS** : Some mail servers report that they have support for STARTTLS, but in fact do not. If you see messages in the "View Errors" link below indicating an inability to connect to server, try checking this option.
- Enter the **Username** to log into the SMTP server above. Contact your System Administrator or ISP for this information if needed.
- Enter the **Password** required to log into the SMTP server.
- Click the **Update Mail Settings** button to save your changes.

PHP Memory Settings

The PHP Memory Settings can have a significant impact on the performance of your system. Please only make changes if you are confident of their impact.



- **Server Memory Allocation (Will Restart System)**: Specify the amount of internal system memory PHP is allowed to use, in MB. For installations with a significant number of employees, increasing this value is recommended. The valid range is 50 up to 231
- **Server Opcode Cache Memory Allocation (Will Restart System)**: Specify the amount of internal system memory that the PHP Opcode Cache is allowed to use, in MB. The amount of memory needed for the Opcode Cache is static so changing this value may decrease system performance. The valid range is 32 up to 77
- **Background Process Memory Allocation**: Specify the amount of internal system memory PHP is allowed to use when running background processes, in MB. For installations with a significant number of employees that run large or lengthy reports, increasing this value is recommended. The valid range is 50 up to 231
- **Background Process Opcode Cache Memory Allocation**: Specify the amount of internal system memory that the PHP Opcode Cache is allowed to use when running background processes, in MB. The amount of memory needed for the Opcode Cache is static so changing this value may decrease system performance. The valid range is 32 up to 77
- Click the **Apply Memory Settings** button to save your changes.

IPSDBRO Database Configuration

- The **Limited Remote Database Username** is the username used for remote database access such as from an ODBC-compliant application. This user is used primarily for read-only access.
- The **Limited Remote Database Password** must be between 8 and 16 characters long (inclusive). Leave blank unless changing password.
- Confirm the **Limited Remote Database Password** by typing it a second time.
- Click the **Update Database Configuration** button to save your changes.

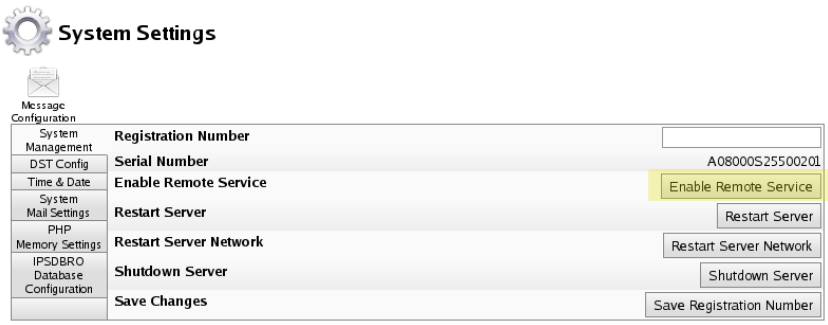
See Also:
Enable Remote Service
Restarting/Shutting Down TimeIPS
TimeIPS Server DST Configuration

Adjusting Time/Date Settings
Adjusting SMTP Mail Settings
PHP Memory Settings
IPSDBBRO Database Configuration
System Settings

Enable Remote Service

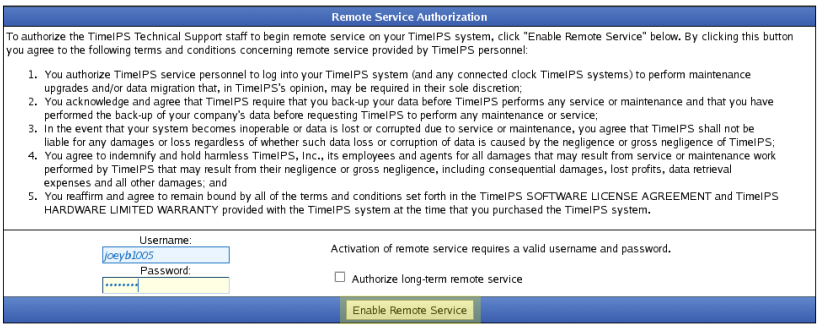
Some troubleshooting procedures may require a TimeIPS support representative to access your TimeIPS® system. Enabling Remote Service grants them this access.

Using the left pane Main Menu » Administration, click on: System » System Settings



1. From the System Management tab, click the **Enable Remote Service** button.

Remote Service Authorization



2. After reading the **Remote Service Authorization**, enter your **Username** and **Password**.
3. If the technician indicated they would need access longer than 24 hours, check the "Authorize long-term remote service" box.
4. Click the **Enable Remote Services** button.

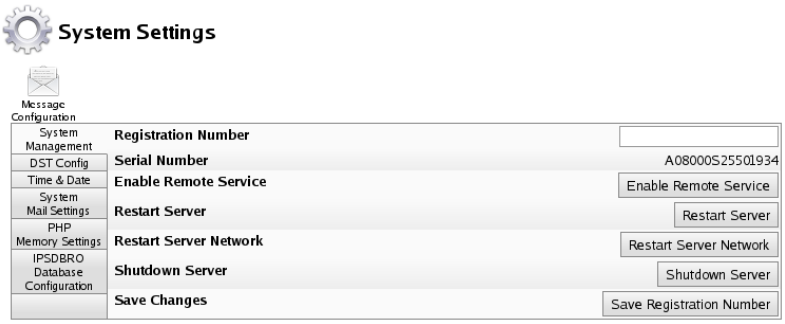
After about one minute, the Remote Service Authorization page will show the following message, indicating the request has been completed.

Remote Service Authorization

Restarting/Shutting Down TimeIPS

You can restart your master TimeIPS station, restart the networking, and shut down your TimeIPS station for maintenance or moving.

Using the left pane Main Menu » Administration, click on: System » System Settings



- Click the **Restart Server** button to restart your TimeIPS® server. Please wait 4-5 minutes for a full restart to finish. TimeIPS will be unavailable during this time.

NOTE: The RESTART SERVER button is a complete power cycle whereas the RESTART SERVER NETWORK button restarts only the networking component of the server.

- Click the **Restart Server Network** button to restart the TimeIPS® server's network. Please wait 2-3 minutes for a network restart to finish. TimeIPS may be briefly unavailable.
- If you need to move or completely turn off power to the TimeIPS Server, click on the **Shutdown Server** button. Please wait 3-4 minutes for the system shutdown to complete. When the fan on the back of the TimeIPS system stops, the shutdown is complete, and the power cord can safely be removed.

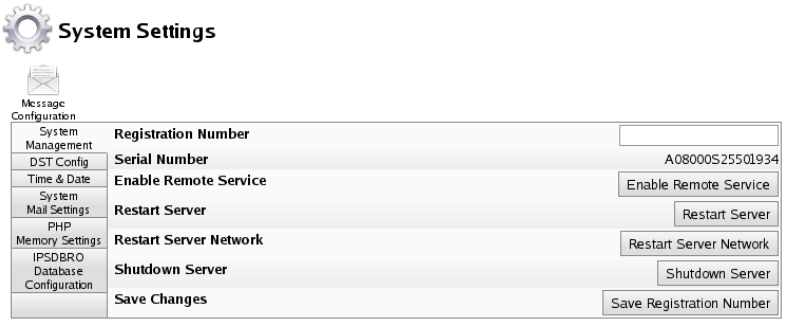
NOTE: If you have multiple TimeIPS stations, the clock stations can be shut down and restarted from their respective IP address links in Clock Configuration.

TimeIPS Server DST Configuration

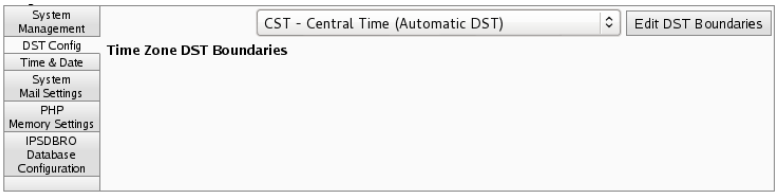
TimeIPS allows you to configure your own Daylight Savings Time rules. This sets the Time Zones used by the system itself, independently of any Company or Division configuration.

TimeIPS stores time in Universal Time (**UTC**, also known as Greenwich Mean Time or GMT) which never changes, despite daylight savings time changes (**DST**) and leap years. Each Time Zone is behind (UTC-) or ahead (UTC+) of Universal Time. TimeIPS uses the **Time Zone** setting to convert the displayed time based on the selected Time Zone.

Using the left pane Main Menu » Administration, click on: System » System Settings



- Click on the **DST Config** tab to the left.



View Time Zone DST Boundaries

The Company/Division Time Zone is the time zone conversion displayed within TimeIPS. The Clock Time Zone is the time zone conversion display for TimeIPS Network Clocks. The Clock Time Zone is set under Clocking -> Clock Configuration.

- If your company, any employees or divisions are in a time zone that observes Daylight Saving Time, select the time zone from the drop down list and click **Edit DST Boundaries** to view the dates when DST starts and stops each year.

Daylight Saving/Summer Time Administration

Back

Daylight Saving/Summer Time (DST) Boundary Dates for CST

The table below shows the date and time when DST begins and ends for the selected time zone in past, present and future years.

- To add an additional DST period, enter a date and time in the "DST Begins" column (in Standard Time) and a date and time in the "DST Ends" column (in Daylight Saving/Summer Time). Then click "Add New".
- The "Time saved" column represents the amount of time clocks are shifted when entering or exiting DST. This is normally 60 minutes (1 hour).
- To edit a DST period simply click on the appropriate item to put the row into edit mode. Hit "Esc" or click "Cancel" to cancel the edit, or hit "Enter" or click "Edit" to commit the changes.
- Although changes made on this page take effect immediately and retroactively, the actual time worked (elapsed time) never changes.
- If you would like to reset all your DST boundary dates, click to erase all changes and reset to defaults.

DST Begins	DST Ends	Time saved	
Apr 1, 2014 2:00 AM	Oct 30, 2014 2:00 AM	60 min	Add New
Apr 05, 1987 02:00 AM CST	Oct 25, 1987 02:00 AM CDT	60 Minutes	Delete
Apr 03, 1988 02:00 AM CST	Oct 30, 1988 02:00 AM CDT	60 Minutes	Delete
Apr 02, 1989 02:00 AM CST	Oct 29, 1989 02:00 AM CDT	60 Minutes	Delete
Apr 01, 1990 02:00 AM CST	Oct 28, 1990 02:00 AM CDT	60 Minutes	Delete
Apr 07, 1991 02:00 AM CST	Oct 27, 1991 02:00 AM CDT	60 Minutes	Delete
Apr 05, 1992 02:00 AM CST	Oct 25, 1992 02:00 AM CDT	60 Minutes	Delete
Apr 04, 1993 02:00 AM CST	Oct 31, 1993 02:00 AM CDT	60 Minutes	Delete
Apr 03, 1994 02:00 AM CST	Oct 30, 1994 02:00 AM CDT	60 Minutes	Delete
Apr 02, 1995 02:00 AM CST	Oct 29, 1995 02:00 AM CDT	60 Minutes	Delete
Apr 07, 1996 02:00 AM CST	Oct 27, 1996 02:00 AM CDT	60 Minutes	Delete
Apr 06, 1997 02:00 AM CST	Oct 26, 1997 02:00 AM CDT	60 Minutes	Delete
Apr 05, 1998 02:00 AM CST	Oct 25, 1998 02:00 AM CDT	60 Minutes	Delete
Apr 04, 1999 02:00 AM CST	Oct 31, 1999 02:00 AM CDT	60 Minutes	Delete
Apr 02, 2000 02:00 AM CST	Oct 29, 2000 02:00 AM CDT	60 Minutes	Delete
Apr 01, 2001 02:00 AM CST	Oct 28, 2001 02:00 AM CDT	60 Minutes	Delete
Apr 07, 2002 02:00 AM CST	Oct 27, 2002 02:00 AM CDT	60 Minutes	Delete
Apr 06, 2003 02:00 AM CST	Oct 26, 2003 02:00 AM CDT	60 Minutes	Delete
Apr 04, 2004 02:00 AM CST	Oct 31, 2004 02:00 AM CDT	60 Minutes	Delete
Apr 03, 2005 02:00 AM CST	Oct 30, 2005 02:00 AM CDT	60 Minutes	Delete
Apr 02, 2006 02:00 AM CST	Oct 29, 2006 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2007 02:00 AM CST	Nov 04, 2007 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2008 02:00 AM CST	Nov 02, 2008 02:00 AM CDT	60 Minutes	Delete
Mar 08, 2009 02:00 AM CST	Nov 01, 2009 02:00 AM CDT	60 Minutes	Delete
Mar 14, 2010 02:00 AM CST	Nov 07, 2010 02:00 AM CDT	60 Minutes	Delete
Mar 13, 2011 02:00 AM CST	Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2012 02:00 AM CST	Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Mar 10, 2013 02:00 AM CST	Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2014 02:00 AM CST	Nov 02, 2014 02:00 AM CDT	60 Minutes	Delete
Mar 08, 2015 02:00 AM CST	Nov 01, 2015 02:00 AM CDT	60 Minutes	Delete

Add Time Zone DST Boundaries

- To add an additional DST period, go to the top of the list then enter a date and time in the **DST Begins** column (in Standard Time) and a date and time in the **DST Ends** column (in Daylight Saving/Summer Time).
- Enter an amount of time in the **Time saved** column. This represents the amount of time clocks are shifted when entering or exiting DST, which is normally 60 minutes (1 hour).
- Then click the **Add New** button.

Mar 13, 2011 02:00 AM CST	Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2012 02:00 AM CST	Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Mar 10, 2013 02:00 AM CST	Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Mar 09, 2014 02:00 AM	Nov 02, 2014 02:00 AM	60 min	Edit Cancel
Mar 08, 2015 02:00 AM CST	Nov 01, 2015 02:00 AM CDT	60 Minutes	Delete
Mar 13, 2016 02:00 AM CST	Nov 06, 2016 02:00 AM CDT	60 Minutes	Delete

Edit Time Zone DST Boundaries

- To edit a DST period, simply click on the appropriate item to put the row into edit mode. Hit "Esc" or click **Cancel** to cancel the edit, or hit "Enter" or click **Edit** to commit the changes.

NOTE: Changing the time zone adjusts how time is displayed, but does not affect the actual time or time worked.

Adjusting Time/Date Settings

TimeIPS synchronizes its time with a Network Time Protocol (NTP) Server or, if an Internet connection is not available, by its own hardware clock.

Using the left pane Main Menu » Administration, click on: System » System Settings

System Settings

- Click on the **Time & Date** tab to the left.

Time Synchronization

- Check the **Use NTP** box to enable automatic time synchronization.

NOTE: Using NTP for time synchronization on your TimeIPS® Server is recommended.

- On some VM systems, the NTP service can still lose significant time. To combat this, you can force a restart of the NTP service every 10 minutes by checking the **Force Restart** box.
- Enter the **NTP Server Address** you wish to synchronize to. (Recommended: ntp.timeips.com) By using Automatic Time Synchronization, your TimeIPS Station will automatically connect and synchronize its time to an NTP server. This is highly recommended because an unsynchronized local clock will drift, eventually resulting in incorrect times. Using this option requires an Internet connection or an NTP server available on your local network. If you have a firewall, be sure that port 123 is not blocked.

TIP: If you have multiple netwok clocks, you can set the NTP Server to the Master's IP address.

- **System Time**: Maually set the date and time of your TimeIPS® Server's internal clock.

Manually setting the time on your TimeIPS® Server is NOT generally recommended.

If you do not have an Internet connection or an NTP server on your local network, you will need to use the local clock option. In this case we recommend checking the time at least once a week and adjusting as needed.
- Click the **Restart NTP Service** button to manually perform a one time restart of the NTP server.
- Click the **Apply Changes** button to save your changes.

WARNING: Changing your time by restarting the NTP or manually adjusting the time may affect past time events, as well as time worked for currently clocked in employees. Ensure that all employee's are clocked out before adjusting the time to maintain the integrity of employee's time worked.

If you do NOT have an active "always on" Internet Connection or you are setting the time and date for the first time:

1. Deselect the **Use NTP** option and adjust the time and date appropriately.
2. Click on the **Apply Changes** button to save the changes.
3. Once the page refreshes, click on the **Restart Server** button to restart the system, synchronizing the hardware clock with the software.

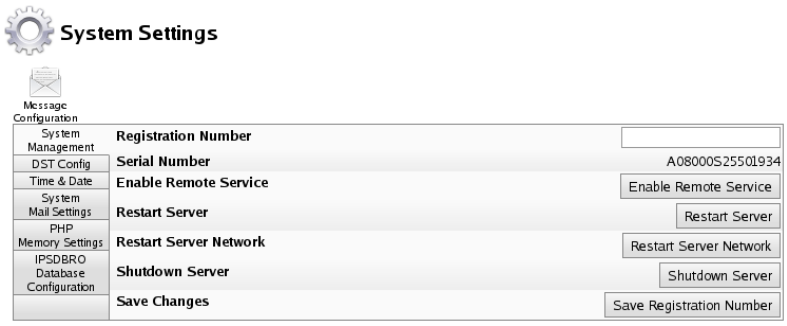
NOTE: TimeIPS stores time on a battery clock when it is without power. The battery clock's time is reset to the TimeIPS system time during reboot. Therefore, Restart Server after adjusting the Time Settings.

Adjusting SMTP Mail Settings

TimeIPS uses email for a number of functions, including notifications, backups, reminders, automatic reports and a variety of alerts.

- TimeIPS can **act as its own SMTP Mail Server**. In this case, the mail server is "**localhost**" and TimeIPS will attempt to connect and deliver email directly. This is the easiest configuration, but unfortunately many ISP's block port 25 (SMTP) traffic as SPAM, preventing this from working. If you try this and do not get email messages from TimeIPS, try the next option.
- A second option is to have TimeIPS use an external SMTP Mail Server. In most cases, the best choice for an external mail server will be the **SMTP server provided by your ISP**. Request the SMTP Mail Server name from your ISP and enter this along with your email account Mail Username and Mail Password.
- If you host **your own mail server**, it may be another good option. Configure TimeIPS to use your SMTP Mail Server and configure your mail server to accept any messages coming from TimeIPS.
- A last option is to use a **third-party** external SMTP mail relay. In this case, you'll configure the Mail Server to point to a remote mail server, such as one provided by Google, Yahoo, or a web hosting provider. External mail servers may require encryption and/or account configuration to work.

Using the left pane Main Menu » Administration, click on: System » System Settings



- Click on the **System Mail Settings** tab to the left.

General Configuration

- Configure the **Mail Server**, **SMTP Username**, and **SMTP Password** as necessary.
  - **Mail Server**: Enter the outgoing SMTP server you would like the TimeIPS® System to send mail through. The default port is 25; use "server:port" to specify a different port.

Some common ISP's and their SMTP Mail Server names:

Common ISP's	SMTP Mail Server Name
AOL	smtp.aol.com
AT&T	outbound.att.net
Charter.net	smtp.charterinternet.com
Comcast	smtp.comcast.net
Cox (east): Cox (west):	smtp.east.cox.net smtp.west.cox.net
Earthlink	smtpauth.earthlink.net
Frontier	smtp.frontier.com
Gmail	smtp.gmail.com
Verizon	outgoing.verizon.net

NOTE: The listed SMTP Mail Servers may have changed since the writing of this document. Please refer to your Internet Service Provider for the current SMTP Mail Server name.

  - Enter the **Username** to log into the SMTP server above. Contact your System Administrator or ISP for this information if needed.
  - Enter the **Password** required to log into the SMTP server.
- Many mail servers require that Secure Sockets be used to send messages. Check the **Use SSL** box if your mail server requires that the TimeIPS® system use SMTP over SSL. Do not check this box if your mail server needs to use STARTTLS; support for STARTTLS will be automatically detected. Checking this box causes the port to default to 465.
- Some mail servers report that they have support for STARTTLS, but in fact do not. If you see messages in the "View Errors" link below indicating an inability to connect to server, try checking the **Disable STARTTLS** box to turn it off.
- Click the **Update Mail Settings** button to save your changes.

Internal/External E-Mail Link Configuration

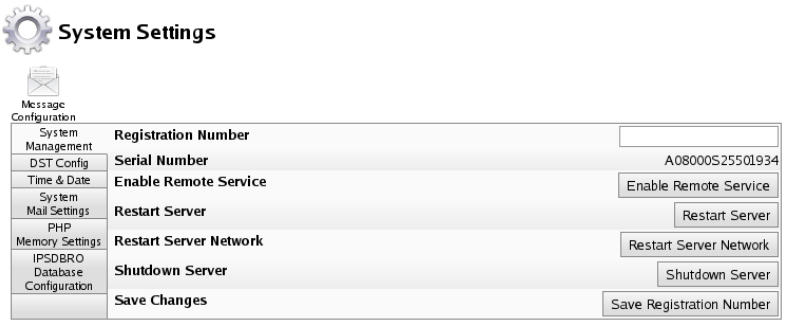
If you use port forwarding to provide external access to your TimeIPS Server (e.g., http://www.yourHostName.com:8000), links provided in E-mails sent from your TimeIPS server may not be routable from your internal network. Your TimeIPS Server can write two different links in place in these E-Mails, the Fully Qualified Domain Name with Port Number, and Direct Internal IP Address.

- **Email Link Configuration**: Some outgoing email will contain links pointing back to specific pages on this server. If email is always accessed from inside your network, select **Internal IP Address**. If email is accessed from outside your network, and/or you have a router/firewall with port forwarding configured, select **Domain Name** and set the domain name under Company/Divisions->URL tab. NOTE: Some router/firewall configurations do not allow internal access to an external IP with port forwarding. If this is the case for you, **Domain Name** links will NOT work inside your network. In this case, select **Provide Both Links**.
- **Email Link Port Number**: If you use port forwarding to redirect external requests to your TimeIPS® Server, set the port here so that links in E-Mails sent by this system will route properly.
- Click the **Update Mail Settings** button to save your changes.

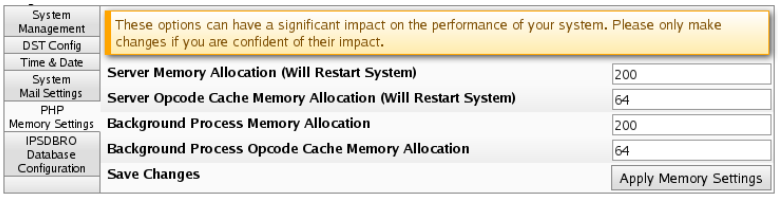
PHP Memory Settings

The PHP Memory Settings can have a significant impact on the performance of your system. Please only make changes if you are confident of their impact.

Using the left pane Main Menu » Administration, click on: System » System Settings



- Click on the **PHP Memory Settings** tab to the left.

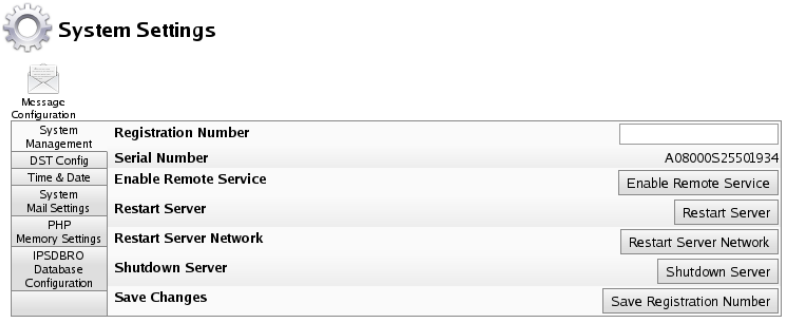


- **Server Memory Allocation (Will Restart System)**: Specify the amount of internal system memory PHP is allowed to use, in MB. For installations with a significant number of employees, increasing this value is recommended. The valid range is 50 up to 231
- **Server Opcode Cache Memory Allocation (Will Restart System)**: Specify the amount of internal system memory that the PHP Opcode Cache is allowed to use, in MB. The amount of memory needed for the Opcode Cache is static so changing this value may decrease system performance. The valid range is 32 up to 77
- **Background Process Memory Allocation**: Specify the amount of internal system memory PHP is allowed to use when running background processes, in MB. For installations with a significant number of employees that run large or lengthy reports, increasing this value is recommended. The valid range is 50 up to 231
- **Background Process Opcode Cache Memory Allocation**: Specify the amount of internal system memory that the PHP Opcode Cache is allowed to use when running background processes, in MB. The amount of memory needed for the Opcode Cache is static so changing this value may decrease system performance. The valid range is 32 up to 77
- Click the **Apply Memory Settings** button to save your changes.

System Message Configuration

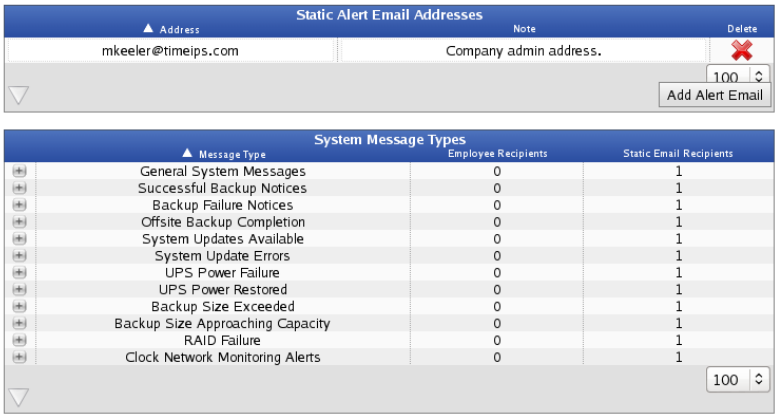
The System Settings page provides the configuration settings for core components of your TimeIPS® Server, including distribution of System Messages.

Using the left pane Main Menu » Administration, click on: System » System Settings



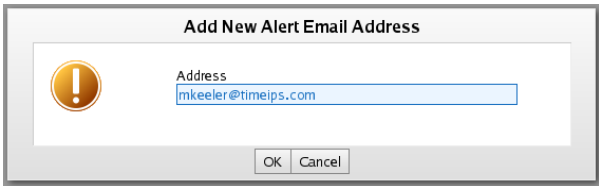
- Click on the **Message Configuration** icon at the top of the page.

System Message Configuration

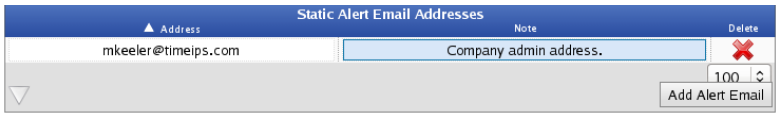


Add Alert Email

- Click on the **Add Alert Email** button in the lower right corner of the Static Alert Email Address table.



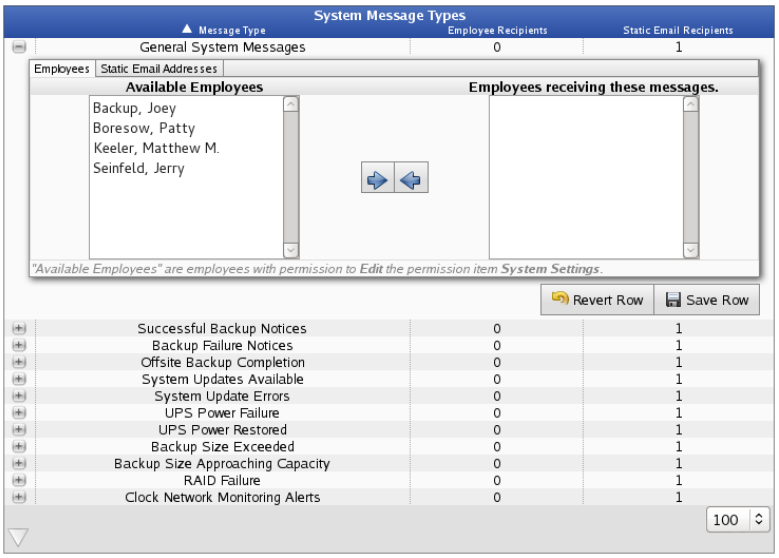
- Enter the **Email Address** and click the **OK** button.



- Optionally, add a **Note**.

Assign and Edit Recipients

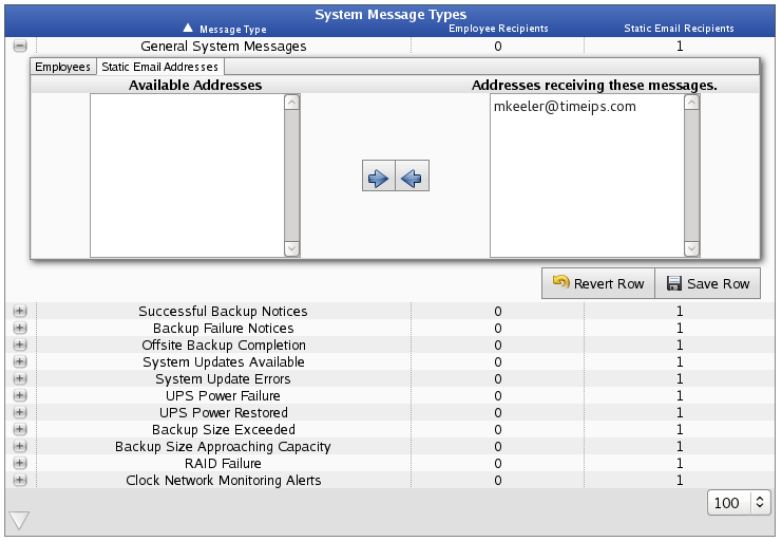
- Click on the **+** (plus) sign to the left of the **Message Type** you would like to view/edit.



Employees Receiving Messages

Available Employees are employees with **System Administrator** permissions. To add/remove employees from the Available Employees list, you need to add/remove them from the System Administrators permission list found under Employees » Permissions » System Adminstrators » Employees.

- If an employee listed in the left column needs to receive this type of message, click on the **Available Employees** name and then click the blue arrow pointing to the right. The employees name will then appear in the right column.
- If an employee is listed in the right column under **Employees receiving these messages** and should stop receiving this type of message, click on the employee's name and then click the blue arrow pointing to the left.
- Click the **Save Row** button to save your changes.



Static Email Addresses

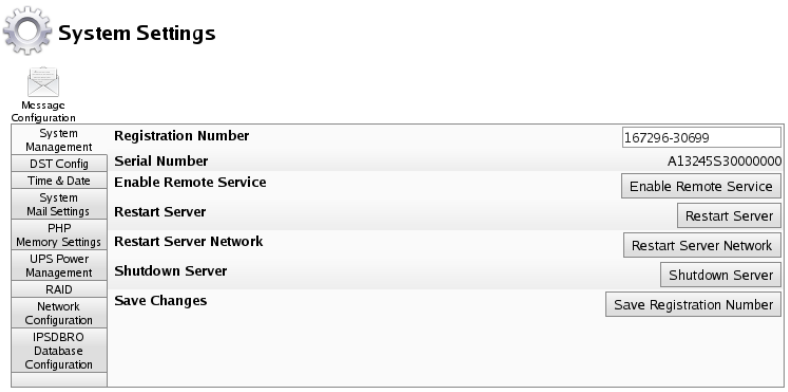
From the Static Email Addresses tab, you can add and remove addresses from the message recipient list.

- If an email address listed in the left column needs to receive this type of message, click on the **AvailableAddress** name and then click the blue arrow pointing to the right. The address will then appear in the right column.
- If an email address is listed in the right column under **Addresses receiving these messages** and should stop receiving this type of message, click on the address name and then click the blue arrow pointing to the left.
- Click the **Save Row** button to save your changes.

Installing an Uninterruptible Power Supply (UPS) Battery Backup

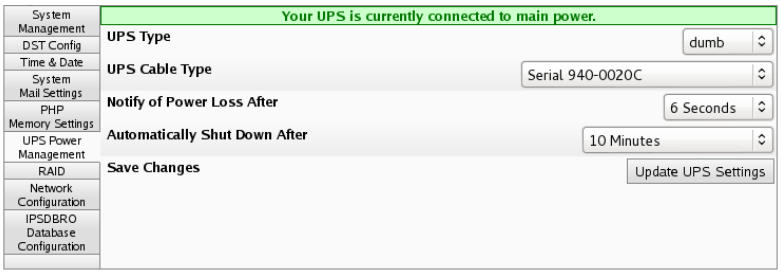
TimeIPS supports graceful shut down with APC brand Uninterruptible Power Supply (UPS) battery backup devices. Most APC brand SmartUPS and BackUPS devices are supported. The Intelligent Personnel System Upgrade (IPSIPS) module is required.

Using the left pane Main Menu » Administration, click on: System » System Settings



- Click on the **UPS Power Management** tab to the left.

UPS Power Management



1. Plug TimeIPS into the UPS device once TimeIPS has been properly shut down.
   a. Shut down your TimeIPS system by clicking on the **Shutdown Server** button in the System Management tab of the page.

   NOTE: Wait until the system completely shuts down, indicated by the small LCD display turning off.

   b. Unplug the power cord from the wall and wait at least 60 seconds.
   c. Plug the power cord into the UPS device and TimeIPS will restart.

   NOTE: If TimeIPS does not start the boot process after plugging the power cord into the UPS device, unplug the power cord and wait at least 60 seconds so the power can drain completely from the motherboard and reset capacitor.

   d. Once TimeIPS has completed booting back up, which may take up to 5 minutes, login and return to the System Settings page.
2. Select the **UPS Cable Type, Notify of Power Loss after** time frame, and **Automatically Shut Down** time frame in the pull-downs.
   - **UPS Cable Type** pull-down includes all supported APC brand cable model numbers.

     NOTE: Be sure to indicate the exact model number found on the cable.

   - **Notify of Power Loss After** pull-down indicates when TimeIPS will notify all employees with System Administrator security of the power loss via email and through the TimeIPS My Messages section.
   - **Automatically shut down** indicates when TimeIPS should be shut down after power loss.

     Note: The "When the battery is low" setting does not work with the 940-0020B or 940-0023A cables. All other devices will automatically shut the TimeIPS system down when the battery is low or when the "Automatically shut down" time has elapsed, whichever comes first.
3. Click on the **Update UPS Settings** button to save the changes.

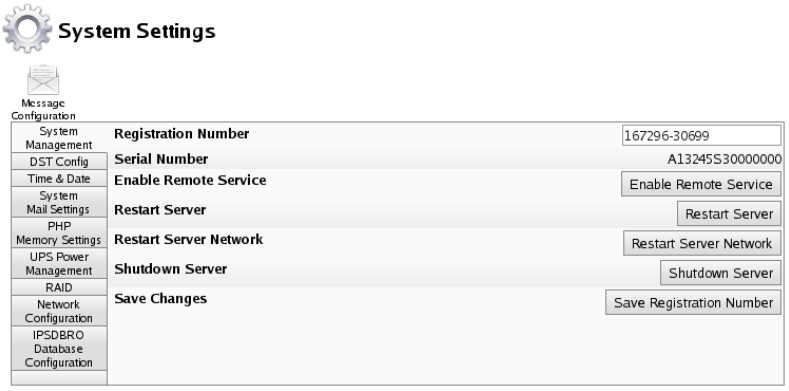
Internal Information (visible to Administrators only):

NOTE: To connect a UPS to the series 2 system the customer will need to use a usb hub. It would be preferable that the hub be powered.

Redundant Storage Status

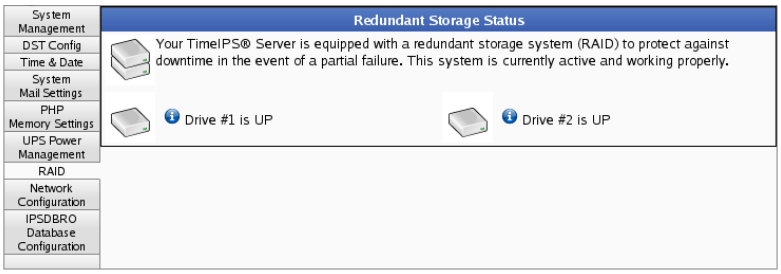
The Redundant Storage Status section shows the current status of the Redundant Storage hard drives.

Using the left pane Main Menu » Administration, click on: System » System Settings

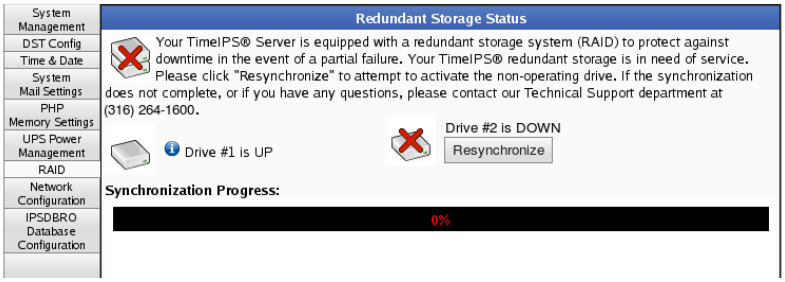


- Click on the **RAID** tab to the left.

RAID



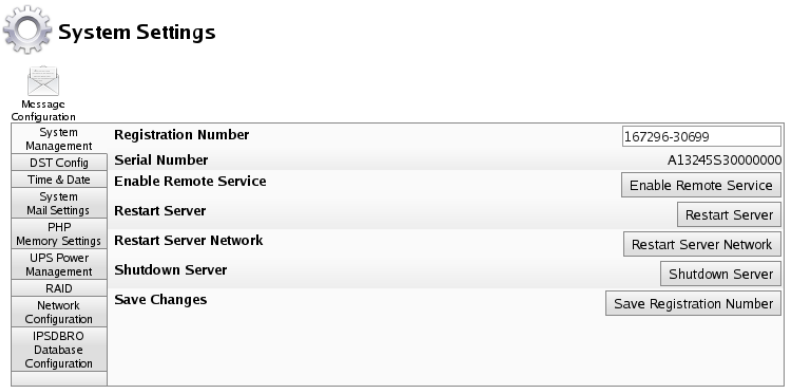
If TimeIPS detects a non-operating hard drive on a redundant storage system, the **System Message Sender E-mail** will be alerted via email. You should first attempt to resynchronize the hard drive by clicking on the **Resynchronize** button as shown below. If the resynchronization does not complete, please contact TimeIPS technical support for assistance.



Adjusting Network Settings

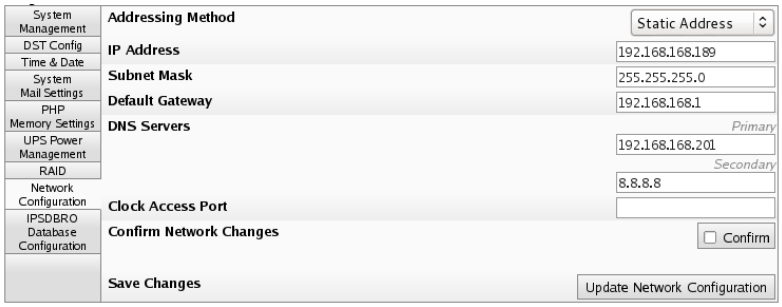
TimeIPS initially uses DHCP (Dynamic Host Configuration Protocol) to automatically gain an IP address from your network during setup. Once your TimeIPS system has been configured, you need to assign it a static, or never changing, IP address for easy access to your TimeIPS system.

Using the left pane Main Menu » Administration, click on: System » System Settings



- Click on the **Network Configuration** tab to the left.

Network Configuration



1. Check the **Confirm Network Change** check box.

NOTE: If you are adjusting the Addressing Method, IP Address, Subnet Mast, or Default Gateway and the Addressing is currently STATIC, you first need to check the Confirm Network Change checkbox.

2. Enter/Adjust the **Addressing Method, IP Address, Subnet Mast, Default Gateway, DNS Servers**, and **Clock Access Port** information as necessary.
   - Use the **Static Addressing Method** whenever possible. Ask your network administrator what **IP Address, Subnet Mask**, and **Default Gateway** used on your network or, if your TimeIPS system is connected directly to your computer, you may set the automatically attained settings to static.
   - A **DNS** (Domain Name System) **Server** translates domain names, such as demo.timeips.com, into its IP address, such as 192.168.1.225.
   - If you need your TimeIPS clock stations to access the TimeIPS master station through a nonstandard port, for instance due to network policy restrictions, enter a **Clock Access Port** number between 1 and 65535 here.
3. Click on the **Update Network Configuration** button to save the changes or any link in the left pane Main Menu to leave the page without applying the changes.

Setting Static Routes (Routing Table)

For advanced networks, TimeIPS can be configured with static routes. This can be done on TimeIPS master or client systems by browsing to http://{ip address of TimeIPS}/staticRoutes.php

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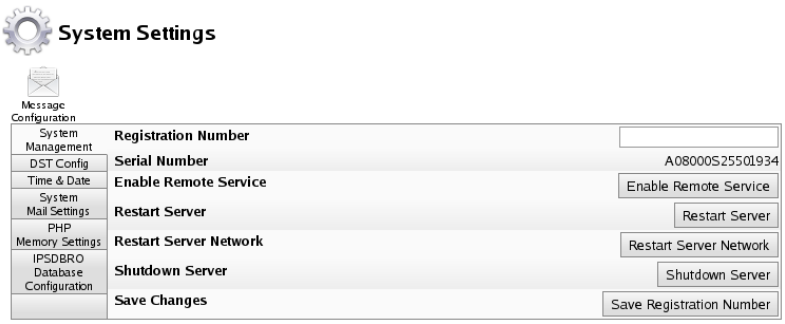
IPSDBRO Database Configuration

The TimeIPS® Database Read-Only Access Module allows setting a password to enable read-only access directly to the TimeIPS database. This allows users with database experience to write queries for external applications including custom reporting.

Using the left pane Main Menu » Administration, click on: System » System Settings



- Click on the **IPSDBRO Database Configuration** tab to the left.

- The **Limited Remote Database Username** is the username used for remote database access such as from an ODBC-compliant application. This user is used primarily for read-only access.
- The **Limited Remote Database Password** must be between 8 and 16 characters long (inclusive). Leave blank unless changing password.
- Confirm the **Limited Remote Database Password** by typing it a second time.
- Click the **Update Database Configuration** button to save your changes.

See Also:
System Message Configuration

Divisions Management

TimeIPS Divisions are designed for companies that own, operate, or provide staff to independent business units or sub-companies. Divisions provide a way to manage sub-companies such that all time, payroll and employee records are separated. Employees can't move between divisions (but they can be laid-off at one division and re-hired at a different division).

The required TimeIPS® Division module (IPSDIV) provides the following features:

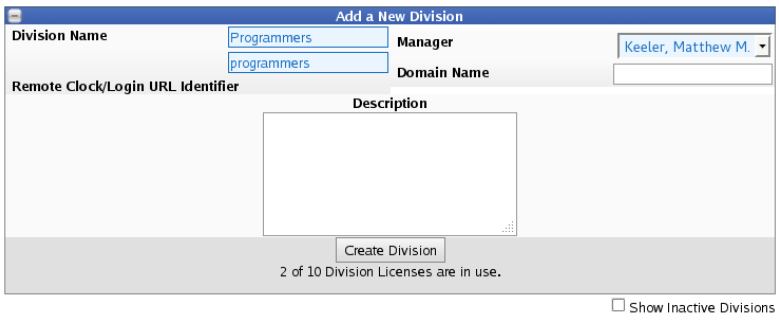
- Each module provides a license for one additional TimeIPS division.
- Additional modules can be purchased for large installations with many divisions.
- Each division provides complete separation for employees, time worked, overtime rules, schedules, jobs, work-orders, departments, sites, clocks, etc.
- Each division can use site-based functionality such as memberships, coverage and restrictions. Additional site licenses can be purchased and used in divisions, if needed.
- Each clock can be assigned to a division and/or site belonging to the division, so that only employees belonging to the division can use the clock.
- When used with telephone clocking, each telephone clocking unit can be assigned to a site of a division, so that only employees belonging to the division can use the phone number.
- When used with remote clocking, a separate access URL can be provided for each division, and only employees belonging to the division can use the URL.
- Employees in a division can be payroll or employee administrators, and can run payroll and reports, but only for employees belonging to the division.
- Critical system settings (like network addresses and master configuration options) are only available to system administrators belonging to the master division.
- Each division can be assigned one or more managers. When used with the IPSPRM permissions module, the role of the division manager can be completely customized.
- Division managers can receive email alerts when new employees are added to a division.
- Note: Because divisions are made for separate business units, employee transfers between divisions are treated as a lay-off from one division and a hire into another. Time worked, benefits earned, payroll processed, etc. for one division never carries over to a different division.

Using the left pane Main Menu » Administration, click on: System » Company/Divisions

Add a New Division

Once a division is created, it can not be deleted however all divisions (expect for the Top Level Division) can be deactived.

- Click on the **+** (plus) sign to the left of the **Add a New Division** bar.



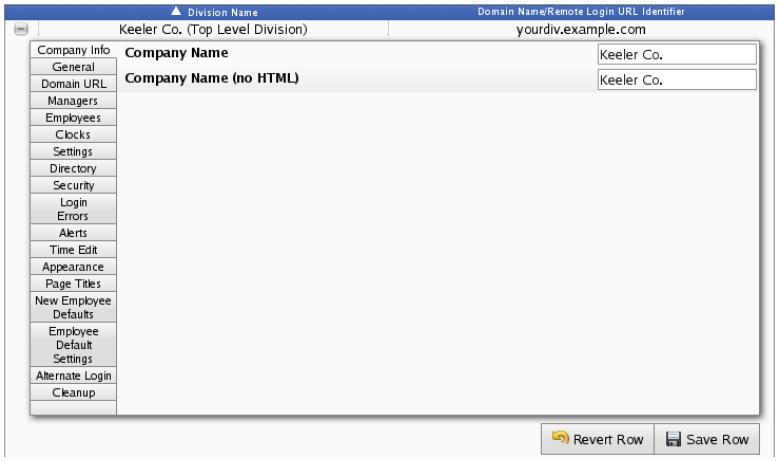
- Enter a unique identifying **Name** for this DIvision.
- Select the **Manager** for this Division.
- The **Remote Clock/Login URL Identifier** is used to uniquely identify an employee's division when using remote clocking or when logging in. This field is necessary for remote clocking within this division.
- The **Domain Name** can be used insead of the Remote Clock/Login URL Identifier if you have a domain name or names that can be assigned to TimeIPS. Any web access using this domain name will use this division, even before logging in. Any domain name that is not specifically assigned to a division will access the top-level division's page.
- Enter a **Description** for this Division.
- Click the **Create Division** button.

Setup and Edit Divisions

Once a division is created, it will appear in the table below. Here you can finish setting up and make any changes needed.

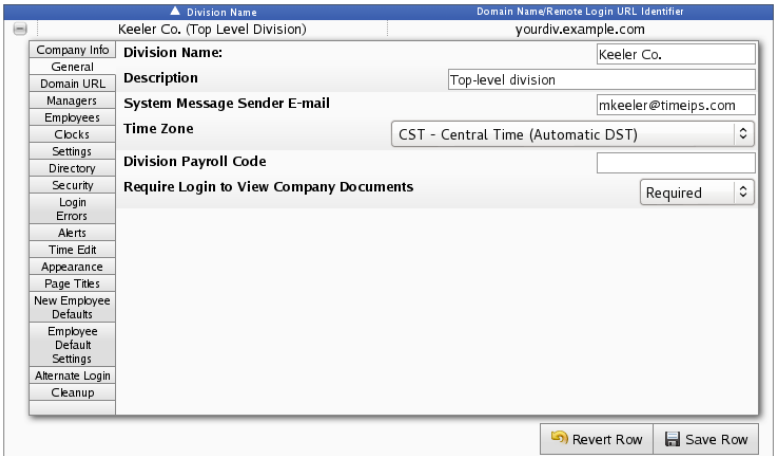
- Click on the **+** (plus) sign to the left of the **Division Name** to expand the window.

Company Info



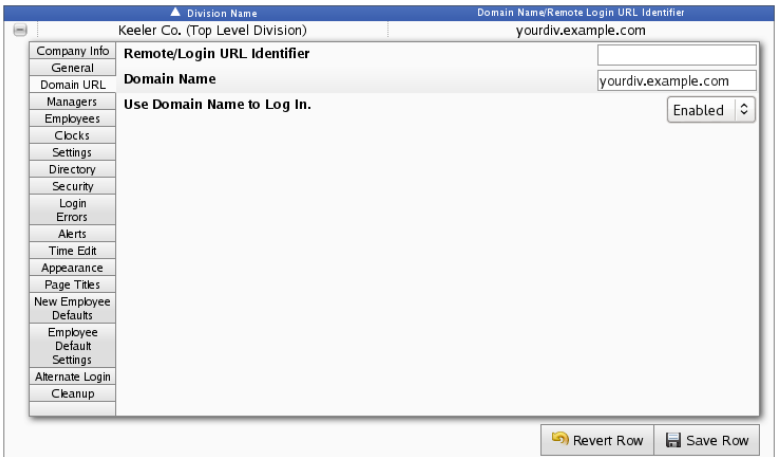
- Enter the master **Company Name** to be used where the company name needs to be displayed.
- Enter the Company Name **without HTML** markup to be used for security certificates, automatic backups, updates, support, and service.
- Be sure to click on the **Save Row** button if any changes are made.

General



- Change the **Division Name** if needed.
- Add a brief **Description** of, or slogan for this division.
- Enter the **System Message Sender E-mail** address. Email messages sent by the system will appear to be from this address.
- Select the **Time Zone** that this company/division operates in.
- Enter a **Division Payroll Code** that is unique to this division which can be included in payroll exports.
- If employees must **login to view the company documents**, select "**Requried**" from the drop down list. Otherwise, select "Unrequired".
- Be sure to click on the **Save Row** button if any changes are made.

Domain URL



- The **Remote Clock/Login URL Identifier** is used to uniquely identify an employee's division when using remote clocking or when logging in. This field is necessary for remote clocking within this division.

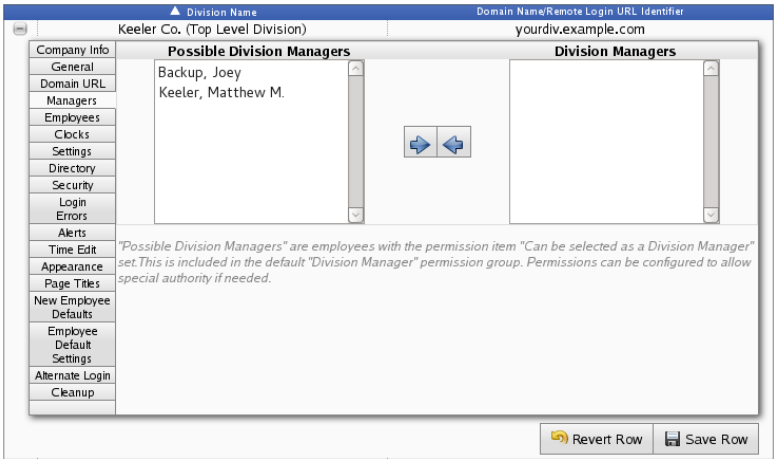
Usage example: If the Remote Clock URL Identifier for this division was "yourdiv", employees in that division could clock in using either: http://local/?division=yourdiv OR http://local/remote/?division=yourdiv
For Login, use: http://local/index.php?mode=login&division=yourdiv

- If you have a **Domain Name** or names that can be assigned to TimeIPST, it can be used instead of the Remote Clock/Login URL Identifier. Any domain name that is not specifically assigned to a division will access the top-level division's page. Any web access using this domain name will use this division, even before logging in.

  Usage example: If the Domain Name for this division was "yourdiv.example.com", an employee could access their division's web page using: http://yourdiv.example.com/
  The employee could perform remote clocking using: http://yourdiv.example.com/ OR http://yourdiv.example.com/remote/
- If the "**Use Domain Name to Log In**" is Enabled, any web access using this domain name will use this division, even before logging in.
- Be sure to click on the **Save Row** button if any changes are made.

Managers

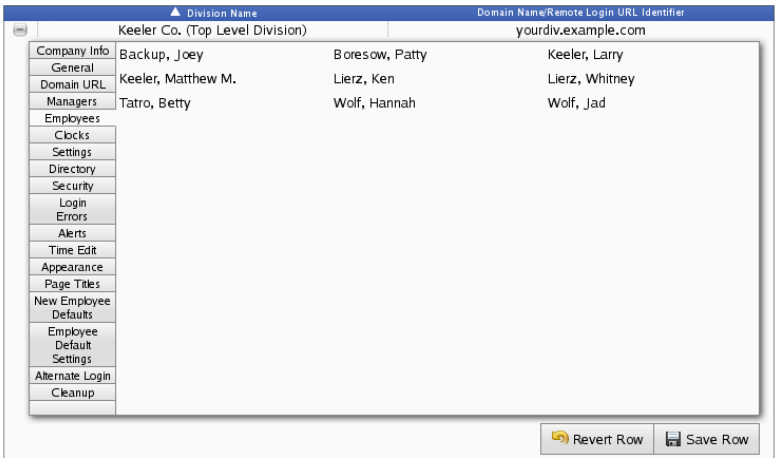
Employees listed as **Possible Division Managers** have the Division Manager permission item "Can Manage" set. To add/remove employees from the Possible Division Managers list, you need to add/remove them from the Division Manager permission list or enable/disable the "Can Manager" permission item found under Employees » Permissions » Division Managers » Employees and Modify Permissions tabs.



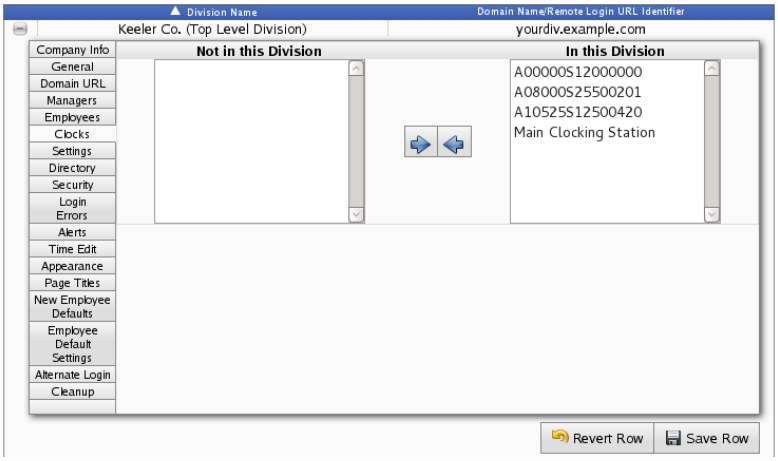
- If an employee listed in the left column needs to receive access to this division, click on the **Possible Division Managers** name and then click the blue arrow pointing to the right. The employees name will then appear in the right column.
- If an employee is listed in the right column under **Division Manager** and should stop receiving access to this division, click on the employee's name and then click the blue arrow pointing to the left.
- Click the **Save Row** button to save your changes.

Employees

A read-only list of all the employees in this division are shown here. To add or terminate employees, go to Administration » Employees.

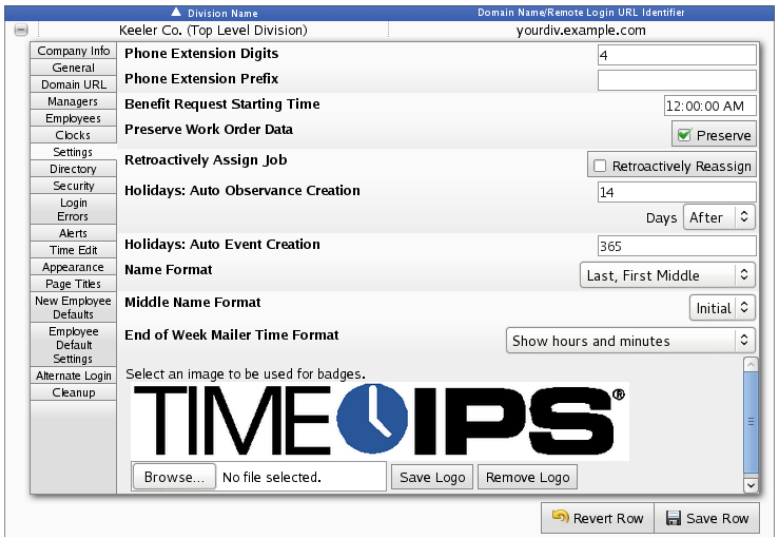


Clocks



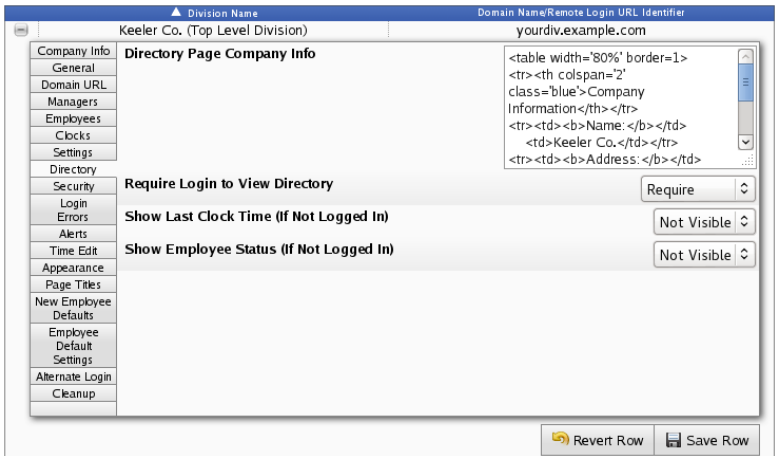
- If a clock listed in the left column under **Not in this Division** but should be a part of this division, click on the clock's name or serial number and then click the blue arrow pointing to the right. The unit's name or serial number will then appear in the right column.
- If a clock is listed in the right column under **In this Division** but is not part of this division, click on the clock's name or serial number and then click the blue arrow pointing to the left.
- Click the **Save Row** button to save your changes.

Settings



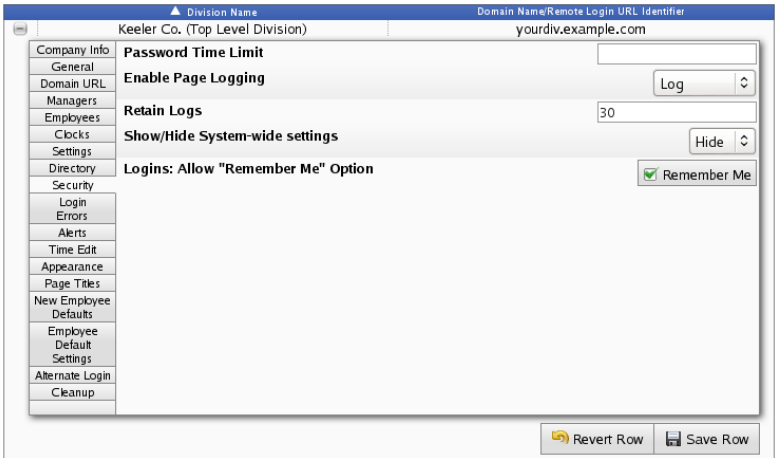
- Enter the number of digits in this company/division's **Phone Extension**.
- Add a **Prefix** to print in front of phone extensions.
- If an employee has a schedule for the day they are requesting benefit time, the start of their schedule is used as the **Benefit Request Starting Time**. In the absence of a schedule, the starting time you specify here will be used instead.
- With the **Preserve Work Order Data** option checked, the system will prevent any automatic loss of data through changes to work order jobs.
- **Retroactively Assign Job**: When performing a job change, instead of creating a new event, retroactively applying the job change will modify the currently open event.
- **Holidays: Auto Observance Creation**: The number of days before/after a holiday occurs that determines when to automatically create the next occurrence. Enter the number of days and select whether it will be created before or after the holiday. Note: The wait time may be ignored by the system if the next observance would occur before completing the waiting period.
- **Holidays: Auto Event Creation**: Enter the number of days into the future that holiday events will be created for employees. Note: Although the event is created in the future, the earned status is not checked until the observance range of the holiday.
- Choose the default format of employees' **full names**.
- Choose a format for employees' **middle names**.
- Choose a TIme Format for the **End of Week Mailer**.
- Click the **Browse** button and select an image to be used for badges.
- Click the **Save Row** button to save your changes.

Directory



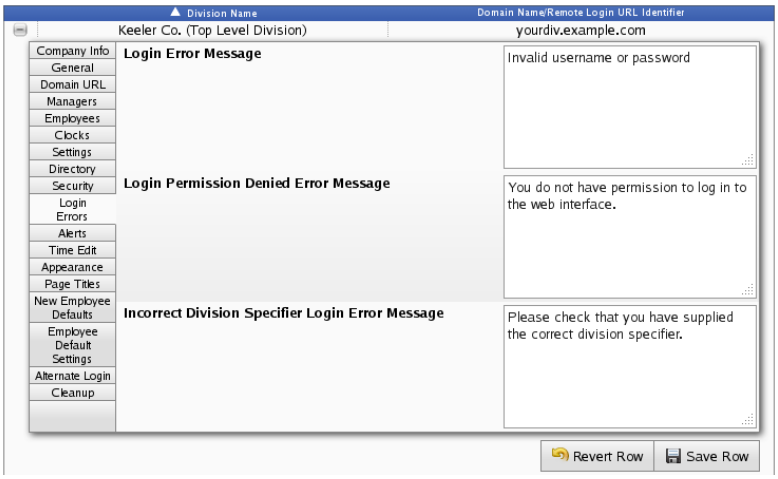
- Information shown on the initial **Directory page** can be customized using HTML. You can write your own code, use the default HTML as a template, or leave it empty to use the default text.
- If employees must **Login to View the Directory**, select "**Requried**" from the drop down list. Otherwise, select "Unrequired".
- To **Show the Last Clocked Time** on the directory page for employees who are not logged in, choose "**Visible**" from the drop down list. This option is only needed if Login is Not Required to view the directory. Once logged in, these settings are determined by the individuals permissions and not this setting, and so it is possible for an employee to see more not logged in depending on their permission settings.
- To allow all employees to **view all statuses** on the directory page without being logged in, select "**Visible**" from the drop down list. This option is only needed if Login is Not Required to view the directory. Once logged in, these settings are determined by the individuals permissions and not this setting, and so it is possible for an employee to see more not logged in depending on their permission settings.
- Click the **Save Row** button to save your changes.

Security



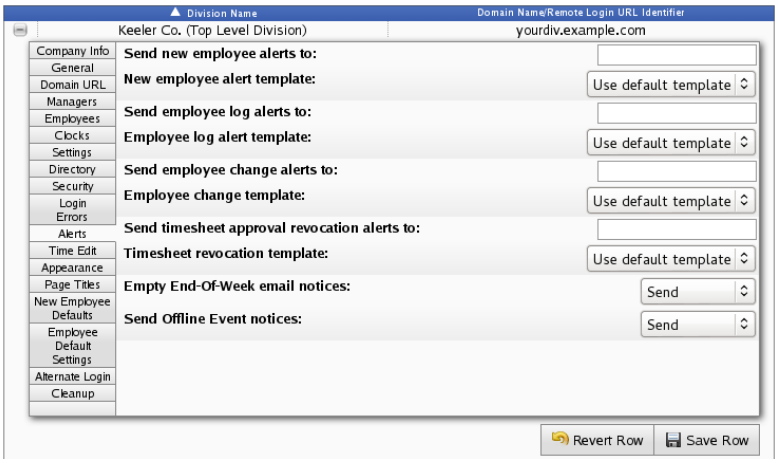
- Enter the number of days before a user is required to change their **Password**. If blank or 0, no requirement is enforced.
- Enable or disable web access **Logging**.
- Enter the number of days to retain web access **Logs**. Set to 0 to retain indefinitely.
- To make global **System Setting**s visible to this company/division, choose "**Show**". Otherwise choose "Hide".
- Check the **Remember Me** box to give employees the option to tell the system to remember their username when they log in.
- Click the **Save Row** button to save your changes.

Login Errors



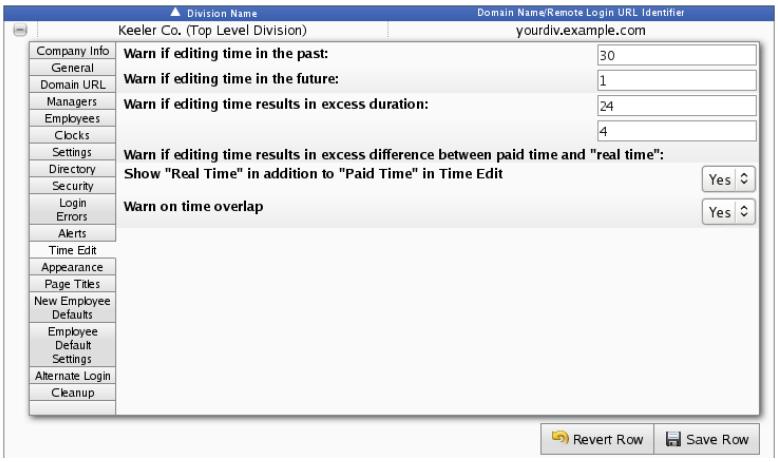
- Customize the **Login Error Message**. This error message will be shown to a user who supplies an invalid username or password to log in to the web interface.
- Customize the **Login Permission Denied Error Message**. This error message will be shown to a user who does not have permission to log in to the web interface. This would likely be a user who is allowed to use remote clocking but is not allowed to log in to the website in general.
- Customize the **Incorrect Division Specifier Login Error Message**. This error message will be shown to a user who attempts to log in to the wrong division.
- Click the **Save Row** button to save your changes.

Alerts



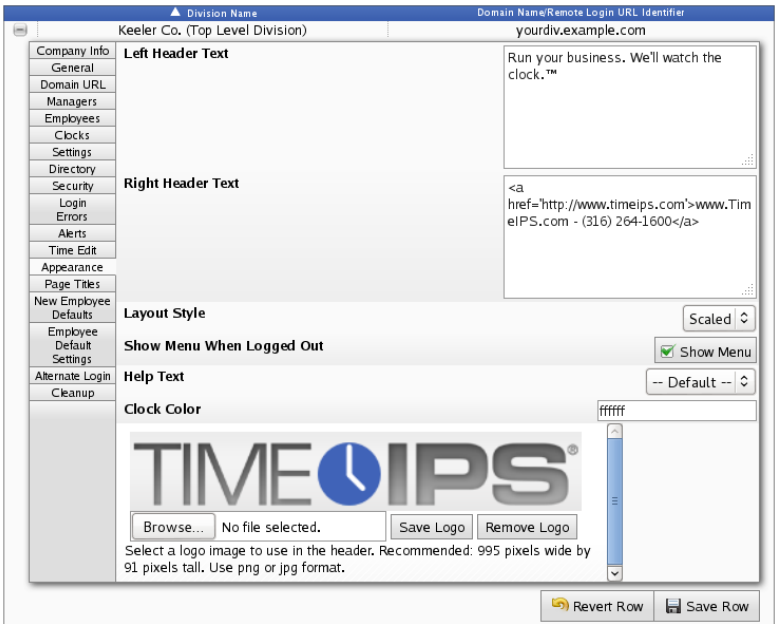
- Enter the email address that should receive **New Employee alerts**. When a new employee is created, an e-mail will be sent to this address.
- Select the email **template** to use when sending a new employee alert.
- Enter the email address that should receive **Employee Log alerts**.When an entry is made to the Employee Audit Log, an e-mail will be sent to this address.
  TIP: Employee Audit Log entries can be created using the **View/Add Changes :: Other** option from the employee's employment tab.
- Select the email **template** to use when sending notification of a new audit log entry.
- Enter the email address that should receive **Employee Change alerts**. When an Employee's personal information is changed, an e-mail will be sent to this address.
- Select the email **template** to use when sending an employee modification alert.
- When an employee's timesheet has been approved but then later invalidated due to editing, an alert is sent to the managers who approved the time. However, an additional alert can also be sent to another address. Enter the extra optional email address that should also receive **Timesheet Approval Revocation alerts**.
- Select the email **template** to use when sending a timesheet revocation alert
- Choose whether or not to send **Empty End-Of-Week email notices**. If the End-Of-Week summary email will be empty for an employee, the system can send the email anyway, or the email can be skipped.
- Choosing to **Send Offline Event notices** will result in daily system generated alterts whenever an employee has offline events.
- Click the **Save Row** button to save your changes.

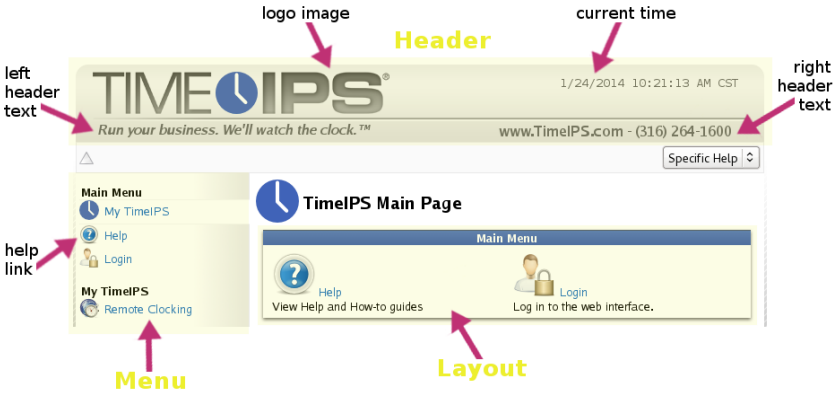
Time Edit

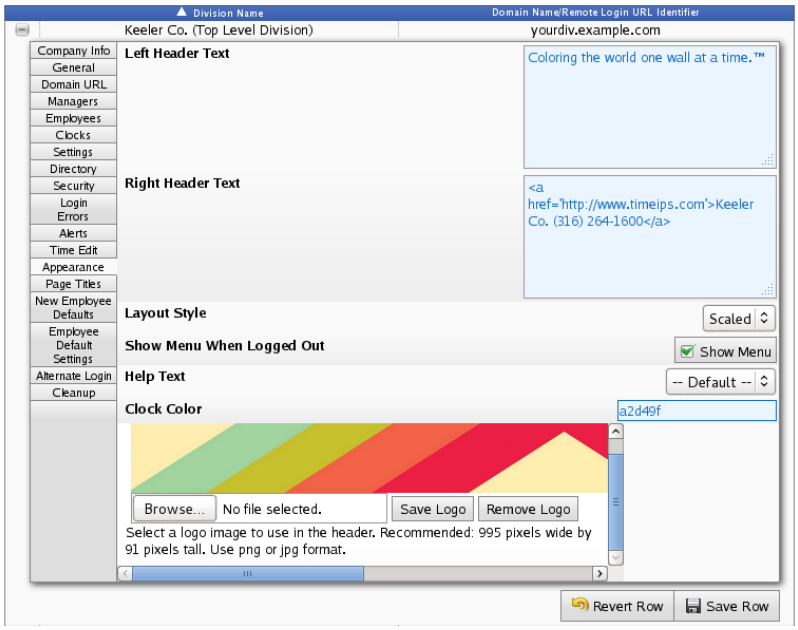


- When **editing time in the past**, a warning can be generated. Specify the number of days into the past that can be edited before a warning is generated.
- When **editing time in the future**, a warning can be generated. Specify the number of days into the future that can be edited before a warning is generated.
- When editing time, a warning can be generated if the **clocked-in duration** exceeds a specified number of hours. Specify the maximun number of hours employees can be clocked in without a warning being generated.
- When editing time, a warning can be generated if the **difference between paid time and "real time"** exceeds a specified number of hours. Specify the maximun number of hours allowed between paid time and "real time" before a warning is generated. NOTE: The "Real Time" option below must be enabled.
- To **Show Real Time in addition to Paid Time** when editing time events, select Yes. Real Time can be tracked in cases where rounding, snapping or other time changes are made, but the original "Real" time of the clock event is still needed for reporting. If set to "No" then, when editing time, the real time will be set to match the paid time.
- When creating or editing time events, a warning can be generated if the new or edited event would result in an **overlapping event** with prior time. Select Yes to generate this warning.
- Click the **Save Row** button to save your changes.

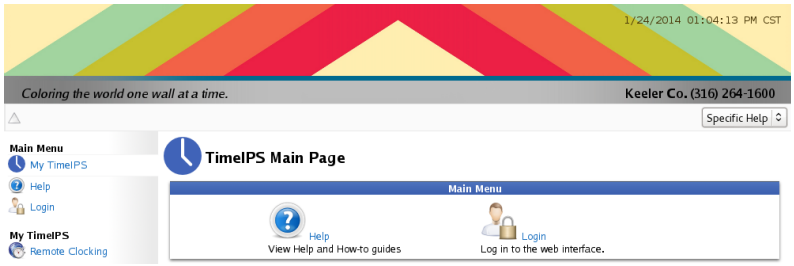
Appearance


Division Name
Domain Name/Remote Login URL Identifier
Keeler Co. (Top Level Division)
yourdiv.example.com
Company Info
General
Domain URL
Managers
Employees
Clocks
Settings
Directory
Security
Login Errors
Alerts
Time Edit
Appearance
Page Titles
New Employee Defaults
Employee Default Settings
Alternate Login
Cleanup
Left Header Text
Run your business. We'll watch the clock.™
Right Header Text
www.TimeIPS.com - (316) 264-1600
Layout Style
Scaled
Show Menu When Logged Out
Show Menu
Help Text
-- Default --
Clock Color
ffffff
Browse...
No file selected.
Save Logo
Remove Logo
Select a logo image to use in the header. Recommended: 995 pixels wide by 91 pixels tall. Use png or jpg format.
Revert Row
Save Row

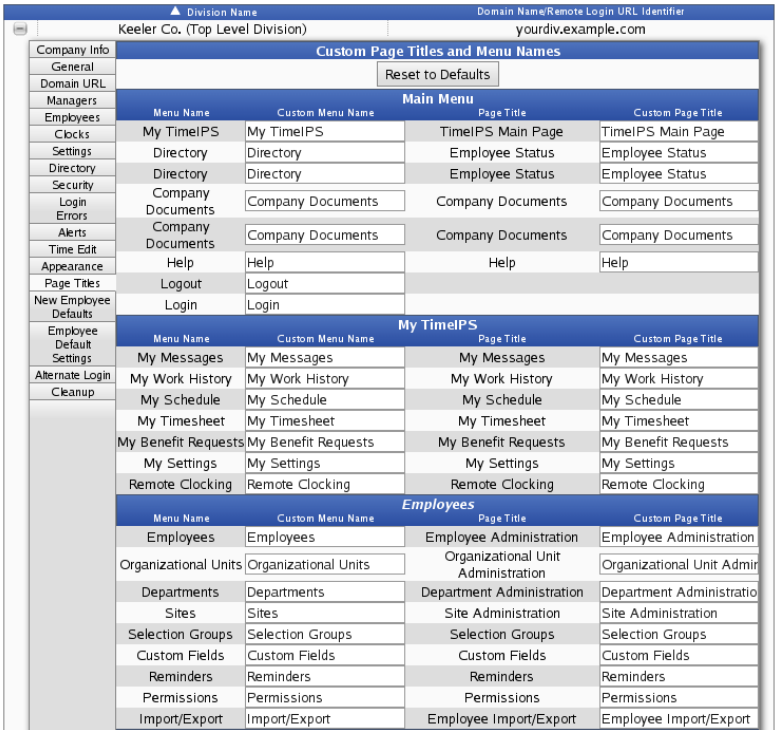

logo image
Header
current time
left header text
right header text
1/24/2014 10:21:13 AM CST
Run your business. We'll watch the clock.™
www.TimeIPS.com - (316) 264-1600
Specific Help
Main Menu
My TimeIPS
Help
Login
My TimeIPS
Remote Clocking
TimeIPS Main Page
Main Menu
Help
View Help and How-to guides
Login
Log in to the web interface.
help link
Menu
Layout



- You can customize the **Left Header Text** that appears beneath the Logo.
- You can customize the **Right Header Text** that appears beneath the Logo.
- Define how the interface's **Layout Style** is rendered when employees are logged out. Either Fixed at 995 pixels or Scaled to fit the browser size.
- When **Show Menu** is checked, logged out employees will see a restricted navigation menu on the left side of the screen. When unchecked, no menu will be shown.
- You can upload your own document to use as a help page when somebody clicks on the **Help link** in the main menu.
- When using a custom logo, you can set the color of the textual representation of the **current time**.
- You can choose your own **logo image** to use in the header. Recommended: 995 pixels wide by 91 pixels tall. Use png or jpg format.
- Click the **Save Row** button, then refresh the page to view the changes.



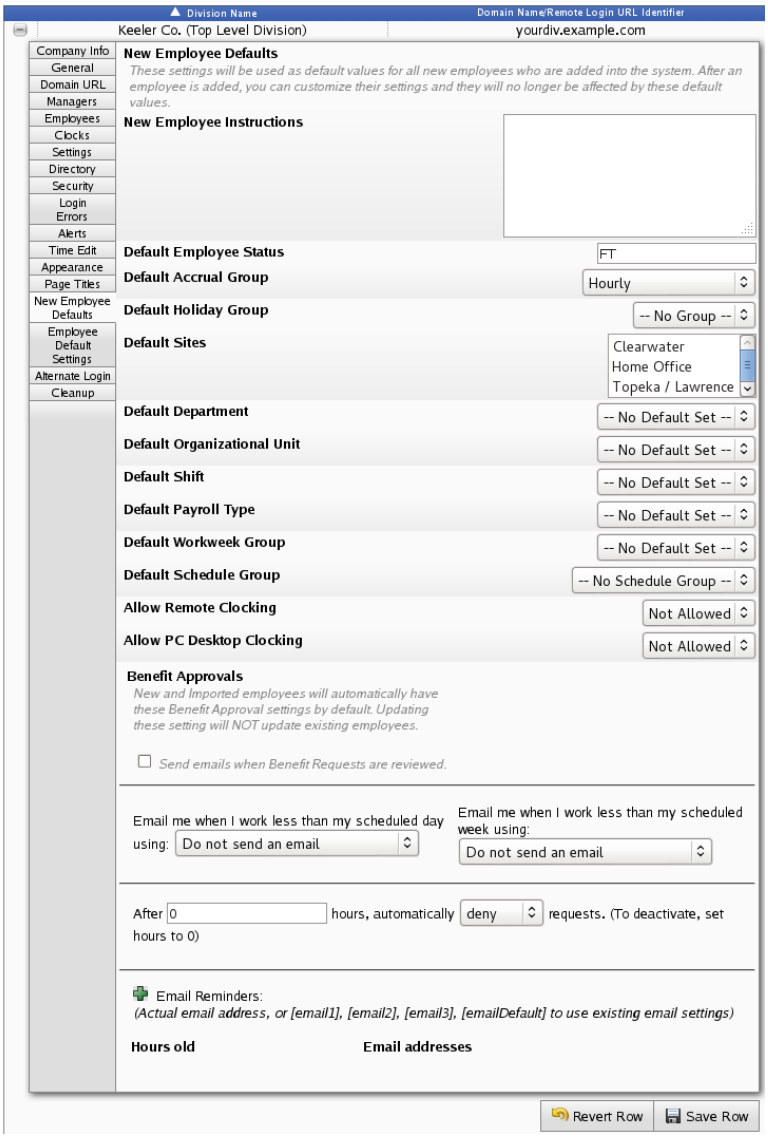
Page Titles



- To change a Page Title, first locate the currect page title in this list.
- Click in the box and enter the desired Page Title.
- Click on the **Save Row** button to save any changes made.

New Employee Defaults

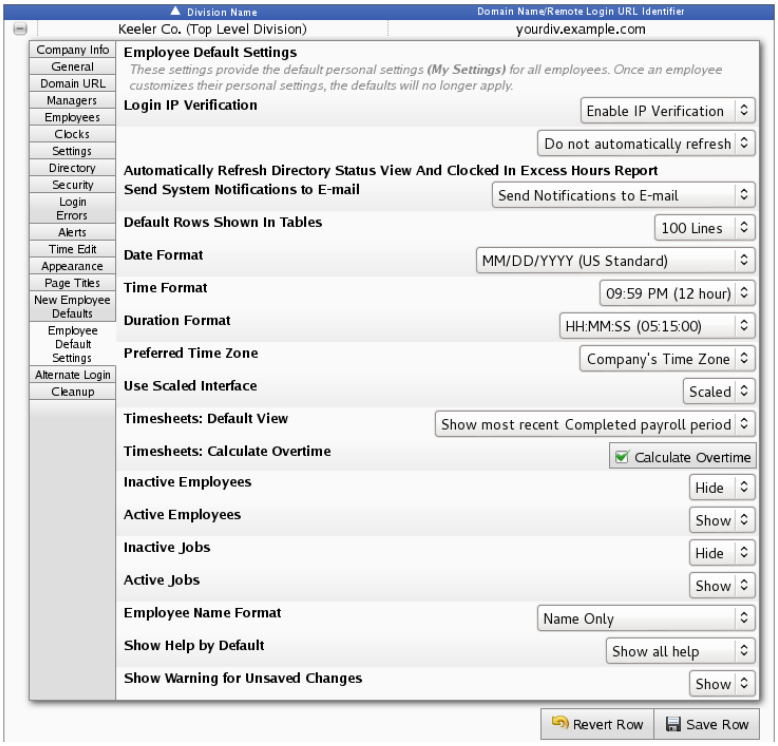
These settings will be used as default values for all new employees who are added into the system. After an employee is added, you can customize their settings and they will no longer be affected by these default values.



- Add optional **Instructions** to be displayed when creating a new employee. These notes will be displayed on the create employee form.
- You can specify the **Default Employee Status** that all new employees will belong to. It is limited to 64 characters long.
- You can specify the default **Accrual Group** that all new employees will belong to when "Add Accrual Schedule" is selected.
- New employees will be automatically added to the selected **Holiday Group**.
- New employees will be automatically added to the selected **Sites**.
- You can specify the **Department** to be selected automatcially when creating a new employee or when importing new employees. When no default is set where a value is required, the system will automatically select the first available option.
- You can specify the **Organizational Unit** to be selected automatcially when creating a new employee or when importing new employees. When no default is set where a value is required, the system will automatically select the first available option.
- You can specify the **Shift** to be selected automatcially when creating a new employee or when importing new employees. When no default is set where a value is required, the system will automatically select the first available option.
- You can specify the **Payroll Type** to be selected automatcially when creating a new employee or when importing new employees. When no default is set where a value is required, the system will automatically select the first available option.
- You can specify the **Workweek Group** to be selected automatcially when creating a new employee or when importing new employees. When no default is set where a value is required, the employee will be required to manually specify the appropriate workweek group.
- You can specify the **Schedule Group** to be selected automatcially when creating a new employee.
- The specified **Remote Clocking** setting will apply to new or imported employees unless there are not enough Remote Clock licenses.
- New and Imported employees will automatically have a **PC Desktop** Employee license when added unless there are not enough licenses.
- New and Imported employees will automatically have these **Benefit Approval** settings by default. Updating these settings will NOT update existing employees.
  - Check the box to **Send emails when Benefit Requests are reviewed**.
  - Choose whether or not to email an employee when they **work less than their scheduled day or week**. Choose an email template.
  - Decided after how many **hours** to eiter automatically **allow or deny** requests.
  - Click the green **+** (plus) sign next to **Email Reminders** to add actual email addresses, or *[email1], [email2], [email3], [emailDefault]* to use existing email settings.

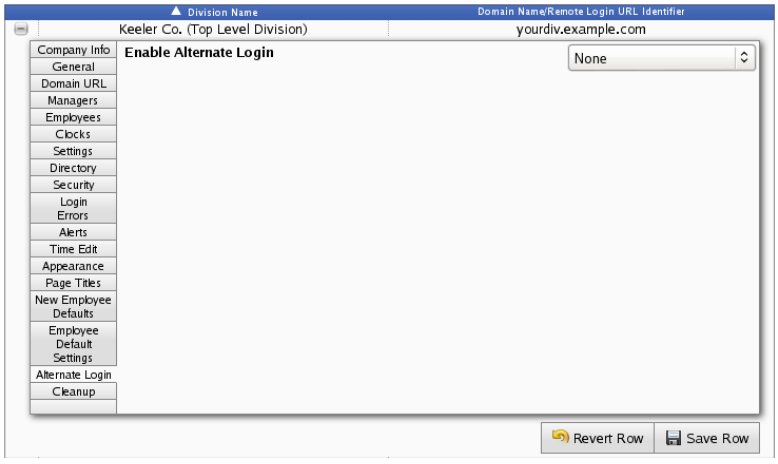
Employee Default Settings

These settings provide the default personal settings **(My Settings)** for all employees. Once an employee customizes their personal settings, the defaults will no longer apply.



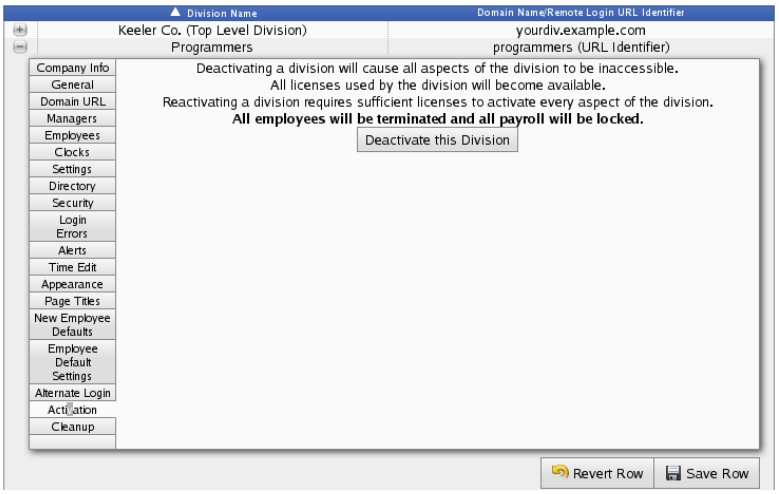
- **Login IP Verification** is a security feature to help prevent cross-site scripting exploits. Some Internet Service Providers (ISPs), most notably AOL, use an aggressive proxying system that may result in users being logged out of the TimeIPS system prematurely. If you use an ISP with aggressive proxying, you may disable IP Verification.
- When viewing **Employee Status** or the **Clocked In Excess Hours Report** in the TimeIPS Directory, activate this option to automatically refresh the page when employees clock out or once every minute.
- **System notifications**, which are notices about operational changes or actions needed in the TimeIPS system, can be sent to your E-mail. The E-mail address used is set in the Employee Administration area.
- Choose the Default number of **Rows to Show in Tables**, for example in Time Edit, Employee Administration, Jobs Administration, etc.
- Select the format which you would like to see **Dates** presented in the system. (Not implemented in all areas.)
- Select the format which you would like to see **Times** presented in the system. (Not implemented in all areas.)
- Select the format which you would like to see **Durations** presented in the system. (Not implemented in all areas.)
- Select the **Preferred Time Zone** to be used. Organizations with employees in multiple timezones may choose to run reports in the context of the company's time zone or each employee's time zone. Timesheet Approvals uses this option directly.
- Choose between a static, fixed with page, or an **Interface** that scales with your browser window.
- Select the **Default View for Timesheets** when used with IPS APP Module.
- Check the **Calculate Overtime** box to include overtime calculations in Timesheet Approvals and My Timesheet. If unchecked then all worked time will be classified as "Worked Time"
- Choose to either hide or show **Inactive Employees** in Employee Selection Lists.
- Choose to either hide or show **Active Employees** in Employee Selection Lists.
- Choose to either hide or show **Inactive Jobs** on the Selection List.
- Choose to either hide or show **Active Jobs** on the Selection List.
- Choose how **Employee Names** are displayed in Selection Lists.
- By default, the **Help** panels are visible and can be hidden by clicking the help icon in your user bar at the top of the TimeIPS Interface. With this option disabled, the help panels will be hidden by default, but can still be shown by clicking the help icon.
- In older version of the TimeIPS Administration software, changes would be saved by collapsing rows and changing tabs. Version 1.8 and above require that changes made be explicitly confirmed by clicking a save button. This option provides a **Warning** for employees used to older versions of the software to remind them that they have outstanding changes if they attempt to save by collapsing rows as in older version.
- So....be sure to click on the **Save Row** button if any changes are made.

Alternate Login

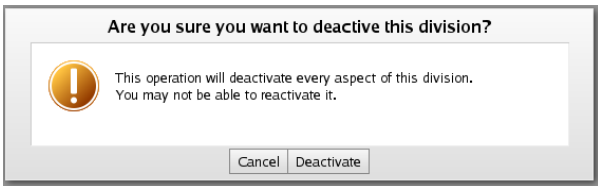


- Select an **Alternate Login** mechanism.

Activation

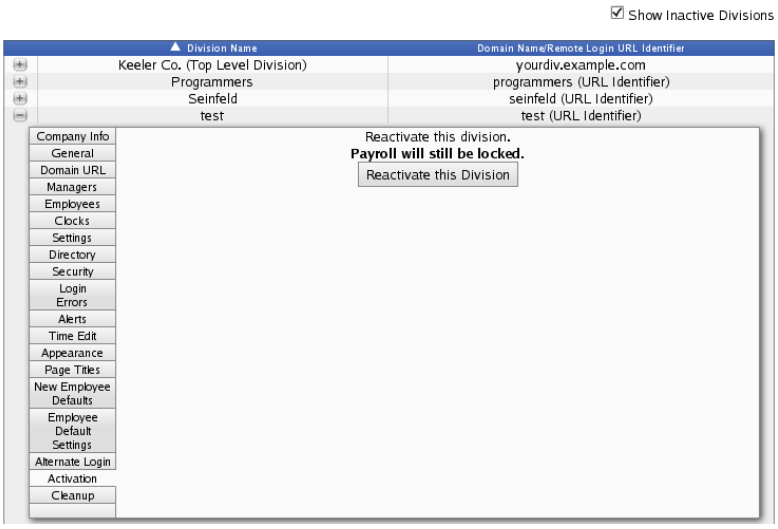


- Deactivating a division will cause all aspects of the division to be inaccessible. All licenses used by the division will become available. **All employees will be terminated and all payroll will be locked.**
  - Click the **Deactivate this Division** button.



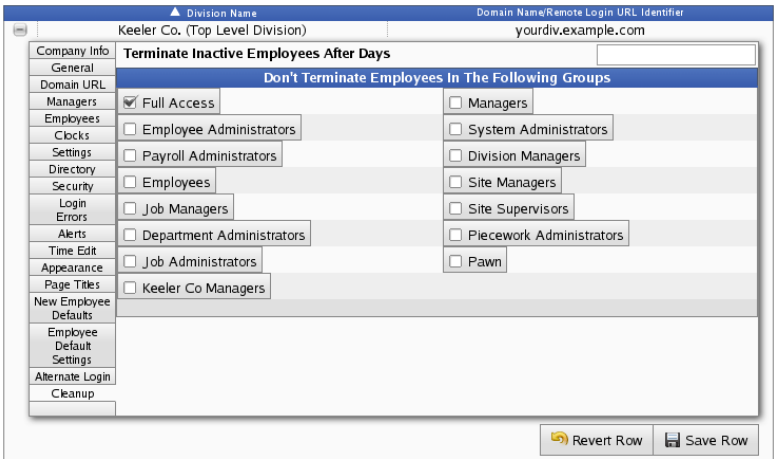
  - If you are sure you want to deactive this division, click the **Deactive** button.

  - Deactivating a division terminates all of its employees, so the system will ask you once again to confirm this action by by clicking the **Deactivate** button one more time.



- Reactivating a division requires sufficient licenses to activate every aspect of the division.

Cleanup



- Enter the maximum number of days employees can have no worked time, benefits, holidays, or piecework before they will be auto-**terminated**. Set to 0 or leave blank to disable this feature.
- To prevent certain **groups** from being auto-terminated, check the box in front of that group.

Internal Information (visible to Administrators only):

To set up divisions for a current employee you will want to export them and then import them.

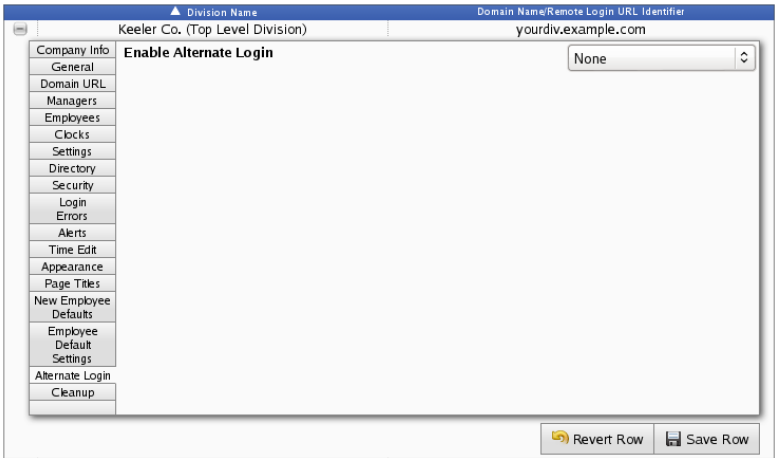
LDAP: Active Directory Sign On Through IPSLOGIN

The Login Integration module (IPSLOGIN) provides an option for employees to log in to TimeIPS using their passwords from a remote LDAP server.

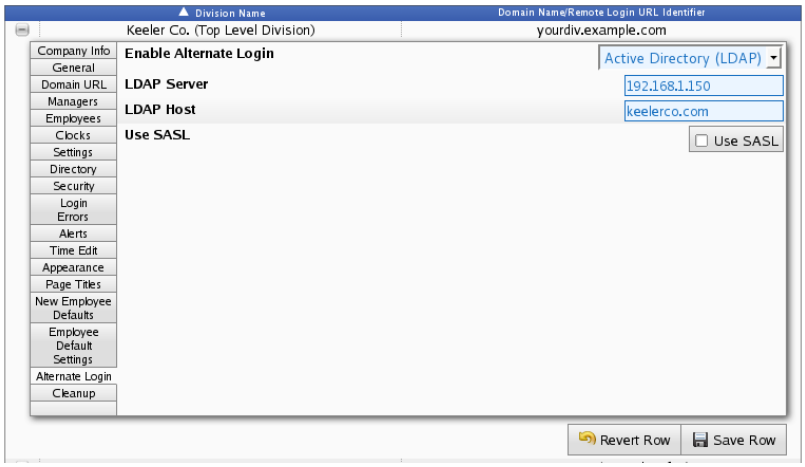
Using the left pane Main Menu » Administration, click on: System » Company/Divisions

Once a division is created, it will appear in the table below. Here you can finish setting up and make any changes needed.

- Click on the **+** (plus) sign to the left of the **Division Name** to expand the window.
- Click on the **Alternate Login** tab to the left.



- Select "**Active Directory (LDAP)**" as the Alternate Login mechanism.



- Provide the domain name or **IP address** of the LDAP or Active Directory Server.
- **LDAP Host**: LDAP requires a valid Fully Qualified Domain Name for authentication. Provide the domain name associated with user accounts on the server. For example if you connected to LDAP using "bobsmith@keelerco.com" then the host value would be "keelerco.com"
- If the LDAP server is using LDAPS or SASL, check the **Use SASL** box.

Employee Configuration

In order for an employee to successfully use LDAP to log on to TimeIPS, two things must be configured correctly.

1. The employee's record in the LDAP server must identify the employee as [username]@[LDAP Host] such as "bobsmith@keelerco.com" in the previous example.
2. The employee's username in TimeIPS must match the username portion of the identifer in LDAP. In our example the username in TimeIPS must be "bobsmith"

When employees attempt to log in to TimeIPS using their username and LDAP password TimeIPS will attempt to authenticate their username/LDAP Host combination against the server using the provided password. If this authentication fails for any reason then TimeIPS will fallback to its normal login procedure to attempt to authenticate with any password that might be stored in TimeIPS.

Sub Divisions

TimeIPS Sub Divisions are designed for companies that need separation of responsibility and visibility based on where the work is done, rather than who did the work. For example, a PEO may have employees that work for multiple clients. If each client is in a sub-division, they would only see the work done for them. They would not see work done for other clients, even when employees work for multiple clients. In another example, managers responsible for distinct areas in a business may need control over time spent in their area, but not over any other work done by the same employees.

The required TimeIPS Sub Division module (IPSSDIV) provides the following features:

- Ability to create as many Sub Divisions as needed.
- Each Sub Division provides separation for work done by employees.
- Employees can work in multiple Sub Divisions.
- Each clock can be assigned to a Sub Division, so that all work done at the clock automatically connects to the Sub Division.
- Managers of Sub Divisions can be configured to set permissions for responsibility and visibility.

Note: Requires TimeIPS version 1.10.1 or later.

Using the left pane Main Menu » Administration, click on: System » Sub Divisions

Add a New Sub Division

Once a sub division is created, it can not be deleted however it can be deactived.

- Click on the **+** (plus) sign to the left of the **Add a New Sub Division** bar.

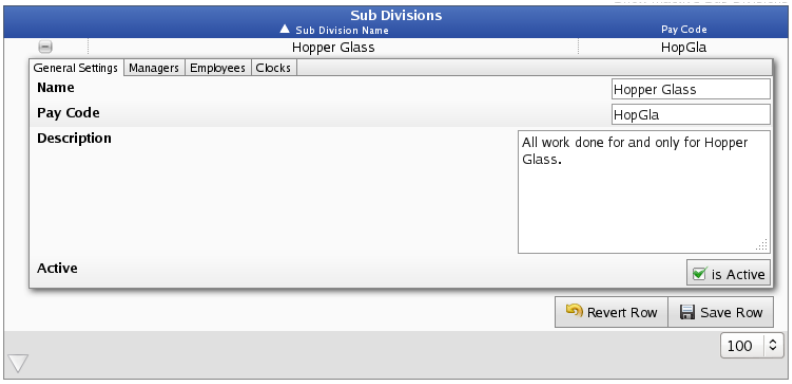
- Enter a unique identifying **Name** for this Sub DIvision.
- Enter a **Description** for this Sub Division.
- Add a **Pay Code** that is unique to this sub division which can be included in reports and custom payroll exports.
- Select the **Manager** for this Sub Division.
- Click the **Create** button.

Setup and Edit Sub Divisions

Once a sub division is created, it will appear in the table below. Here you can finish setting up and make any changes needed.

- Click on the **+** (plus) sign to the left of the **Sub Division Name** to expand the window.

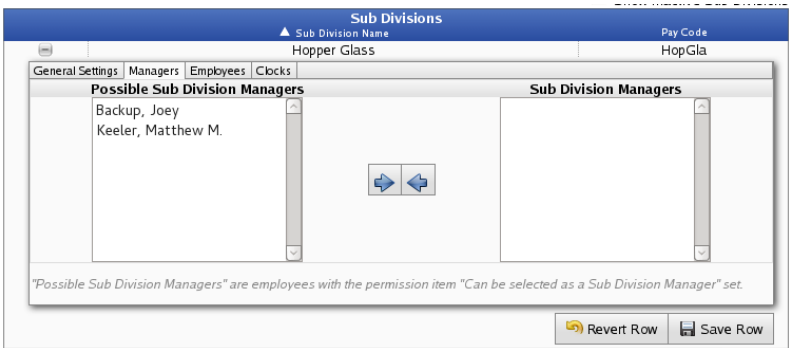
General Settings



- Enter or update the sub division **Name**, **Pay Code**, and **Description** as necessary.
- To Deactivate this sub division, uncheck the **is Active** box.
- Be sure to click on the **Save Row** button if any changes are made.

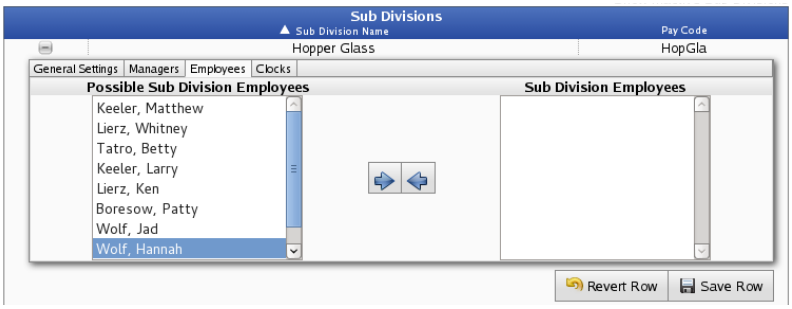
Managers

Employees listed as **Possible Sub Division Managers** have the Division Manager permission item "Can Manage" set. To add/remove employees from the Possible Division Managers list, you need to add/remove them from the Division Manager permission list or enable/disable the "Can Manage" permission item found under Employees » Permissions » Division Managers » Employees and Modify Permissions tabs.



- If an employee listed in the left column needs to receive access to this sub division, click on the **Possible Sub Division Managers** name and then click the blue arrow pointing to the right. The employees name will then appear in the right column.
- If an employee is listed in the right column under **Sub Division Managers** and should stop receiving access to this sub division, click on the employee's name and then click the blue arrow pointing to the left.
- Click the **Save Row** button to save your changes.

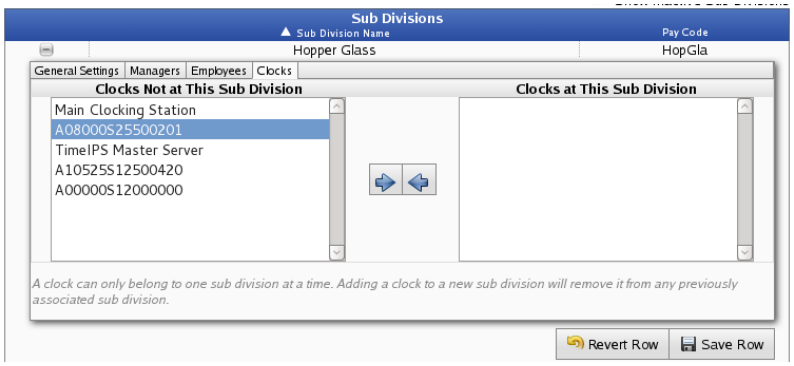
Employees



- If an employee listed in the left column needs to be a part of this sub division, click on the **Possible Sub Division Employees** name and then click the blue arrow pointing to the right. The employees name will then appear in the right column.
- If an employee is listed in the right column under **Sub Division Employees** and is no longer part of this sub division, click on the employee's name and then click the blue arrow pointing to the left.
- Click the **Save Row** button to save your changes.

Clocks

A clock can only belong to one sub division at a time. Adding a clock to a new sub division will remove it from any previously associated sub division.

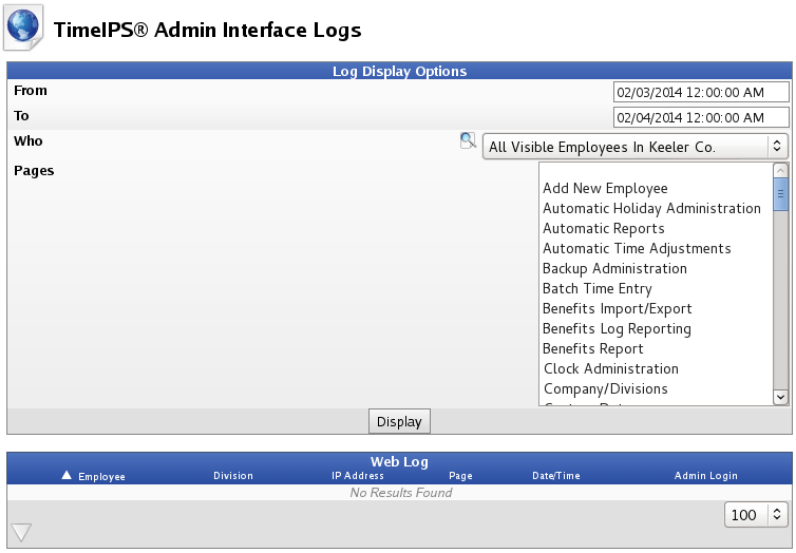


- If a clock is listed in the left column under **Clocks Not at This Sub Division** but should be a part of this division, click on the clock's name or serial number and then click the blue arrow pointing to the right. The unit's name or serial number will then appear in the right column.
- If a clock is listed in the right column under **Clocks at This Sub Division** but is not part of this sub division, click on the clock's name or serial number and then click the blue arrow pointing to the left.
- Click the **Save Row** button to save your changes.

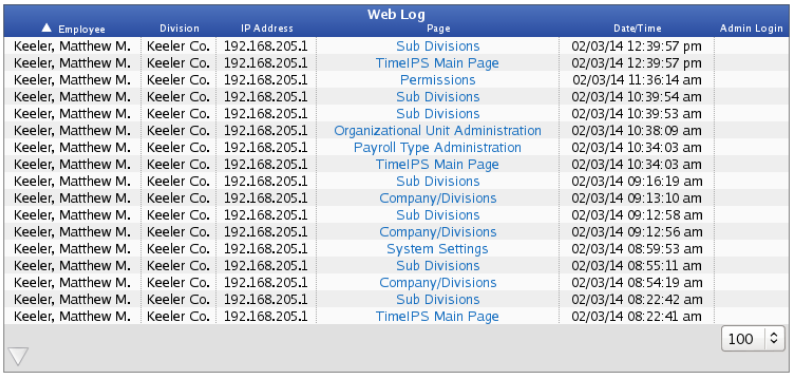
Web Access Logs

The Web Access Logs page displays all TimeIPS web pages accessed by any employee within the past 30 days.

Using the left pane Main Menu » Administration, click on: System » Web Access Logs



- Select a **From** and **To** date to define the range of the report.
  Note: By default, web access logs are only kept for 30 days. This can be configured under System » Company/Divisions » Security.
- Select the employee or group of employees you would like to view.
- Select one or more **Pages** in question. Use Ctrl-click or click and drag to select multiple pages at once.
- Click **Display** to see results.



Web Log

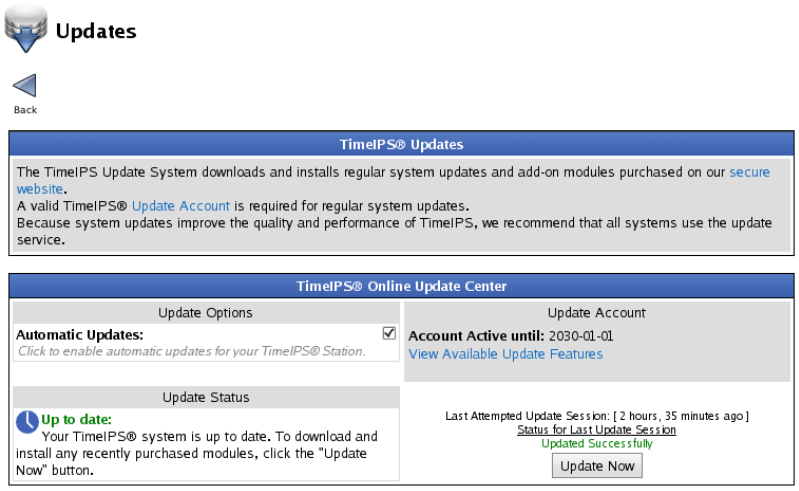
Employee	Division	IP Address	Page	Date/Time	Admin Login
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Sub Divisions	02/03/14 12:39:57 pm	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	TimeIPS Main Page	02/03/14 12:39:57 pm	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Permissions	02/03/14 11:36:14 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Sub Divisions	02/03/14 10:39:54 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Sub Divisions	02/03/14 10:39:53 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Organizational Unit Administration	02/03/14 10:38:09 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Payroll Type Administration	02/03/14 10:34:03 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	TimeIPS Main Page	02/03/14 10:34:03 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Sub Divisions	02/03/14 09:16:19 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Company/Divisions	02/03/14 09:13:10 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Sub Divisions	02/03/14 09:12:58 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Company/Divisions	02/03/14 09:12:56 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	System Settings	02/03/14 08:59:53 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Sub Divisions	02/03/14 08:55:11 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Company/Divisions	02/03/14 08:54:19 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	Sub Divisions	02/03/14 08:22:42 am	
Keeler, Matthew M.	Keeler Co.	192.168.205.1	TimeIPS Main Page	02/03/14 08:22:41 am	

100

Updating TimeIPS

The TimeIPS Update System downloads and installs regular system updates and add-on modules purchased on our secure website. Because system updates improve the quality and performance of TimeIPS, we recommend that all systems use the update service.

Using the left pane Main Menu » Administration, click on: System » Updates



- TimeIPS will automatically update general release downloads if the **Automatic Updates** checkbox is checked.
- You can manually Update TimeIPS by clicking on the **Update Now** button. The download and installation can take an hour or more depending on the number of updates and your Internet connection speed. The screen will indicate when the **Last Attempted Update** was made and also what the **Status for Last Update** was.

In order to Update you must have:

- An Internet Connection to TimeIPS.
- An active Update Account. Please contact your TimeIPS sales reprenentative to check your account status and/or purchase updates.
- If you have a firewall or router, certain ports must be opened. View the list of required ports on the Updates page.

NOTE: If you need assistance configuring your router or firewall, please contact the manufacturer. TimeIPS Technical Support Representives are not trained to configure non-TimeIPS equipment.

See Also:
What's New in TimeIPS
Modules/Upgrades
Getting Started with TimeIPS

Modules/Upgrades

Many features and optional modules are available for TimeIPS to expand and improve the system's capabilities.

Using the left pane Main Menu » Administration, click on: System » Modules/Upgrades.

IPSABO Automatic Backup Options

The Automatic Backup Options module provides backup options:

- Automated FTP backups without a TimeIPS Backup Account
- Automated SFTP backups without a TimeIPS Backup Account
- Automated Email backups without a TimeIPS Backup Account
- Configurable hour-of-the-day for Email and FTP and SFTP backups to run
- Schedule hour-of-the-day for backups to run, up to 24 times per day

IPSAPP Approvals

The TimeIPS IPSAPP – Approvals Module™ provides the following request and approval options:

- Employees Request Benefit Use, Managers Can Approve or Deny. Employees see a Benefits Request option under MyTimeIPS. Benefit use can be requested. Managers see requests and can approve or deny. Email reminders and numerous configuration options.
- Employees and Managers Approve Timecards for Payroll. Employees see a Timecard Approval option under MyTimeIPS. Worked time can be reviewed on a calendar and approved. Managers see approved and pending timecards. Payroll checks for all approved timecards before running. Email reminders and numerous configuration options.

IPSASH Advanced Scheduling

The TimeIPS IPSASH - Advanced Scheduling Module™ is an expansion to the TimeIPS scheduling system (IPSSCH) that allows creating advanced rules and actions for scheduled trigger and times.

- Advanced Trigger Rules
- Advanced Actions
- Complex Repeating Rules
- Rule Start and Stop Dates

IPSBEN Advanced Benefits Tracking

The Advanced Benefits Tracking module includes:

- Additional accrual tenure levels
- Additional accrual profiles
- Addtional accrual/benefit types

IPSBRD Burdened Rate

This Burdened Rate Module provides the ability to create and manage burdened rate which can be configured for each type of pay, for each employee, based on hours worked.

- Allows the creation of burdened rates per employee.
- Burdened rates can be set for each pay type, including standard time, over time and double time.
- Burdened rates can be set for each benefit type, including sick, vacation and holiday.
- Burdened rates can be set to change as the employee works additional time. As many transition points can be configured as needed, for example, starting at 0 hours, 520 hours, 1,000 hours, etc.
- Burdened rates do not impact pay calculations, but can be used in custom payroll and/or custom reports to show the pay due the employee and the burdened cost for that pay, based on the figures entered.

IPSCAPI TimeIPS Client API

The IPSCAPI module is a programming API that allows automated clocking and status checks using custom scripts. The TimeIPS Clock API Module provides the following features:

- Programming API to allow clocking and status checks using custom scripts
- Supports Employees, Jobs, ID/Badge Mappings and more

IPSCDF Custom Data Fields

The TimeIPS IPSCDF - Custom Data Fields Module is an expansion module to the TimeIPS system that allows the creation of custom data fields for the company and employees to allow improved tracking of specialized information.

- Allows creating custom data fields per company/division.
- Allows creating custom data fields per employee
- Benefits include:
  - Ability to track additional information
  - Match terminology with existing conventions and/or external software
  - Custom company data can be used in payroll exports and custom reporting for translation and lookups.

IPSCLT TimeIPS Time Clock Station Support

Expand your TimeIPS system with support for additional Time Clock Stations. This module adds one additional time clock station to the maximum number supported by your current system.

IPSDBRO Database Read-Only Access

The TimeIPS® Database Read-Only Access Module allows setting a password to enable read-only access directly to the TimeIPS database. This allows users with database experience to write queries for external applications including custom reporting.

IPSDIV Division

TimeIPS Divisions are designed for companies that own, operate, or provide staff to independent business units. Each Division module allows for the creation of an additional sub-company where virtually all the operations in TimeIPS are available, but the lists of employees, jobs, departments, etc. are totally separate.

The TimeIPS Division module provides the following features:

- Each module provides a license for one additional TimeIPS division.
- Additional modules can be purchased for large installations with many divisions.
- Each division provides complete separation for employees, time worked, overtime rules, schedules, jobs, work-orders, departments, sites, clocks, etc.
- Each division can use site-based functionality such as memberships, coverage and restrictions. Additional site licenses can be purchased and used in divisions, if needed.
- Each clock can be assigned to a division and/or site belonging to the division, so that only employees belonging to the division can use the clock.
- When used with telephone clocking, each telephone clocking unit can be assigned to a site of a division, so that only employees belonging to the division can use the phone number.
- When used with remote clocking, a separate access URL can be provided for each division, and only employees belonging to the division can use the URL.
- Employees in a division can be payroll or employee administrators, and can run payroll and reports, but only for employees belonging to the division.
- Critical system settings (like network addresses and master configuration options) are only available to system administrators belonging to the master division.
- Each division can be assigned one or more managers. When used with the IPSPRM permissions module, the role of the division manager can be completely customized.
- Division managers can receive email alerts when new employees are added to a division.
- Note: Because divisions are made for separate business units, employee transfers between divisions are treated as a lay-off from one division and a hire into another. Time worked, benefits earned, payroll processed, etc. for one division never carries over to a different division.

IPSEMA Employee Mobile Application Clocking License

This Employee Mobile Application clocking license allows one mobile device to run the TimeIPS mobile clocking applet for a single employee. (There are additional modules for mobile application clocking licences in lots of 10, 20, 30, 40, and 50 employees.)

- Allows a single employee to clock using a mobile device.
- Add as many licenses as needed for number of employees with mobile devices.
- Each clock-in/out is tagged with the location based on GPS (if supported in the mobile device).
- Ideal for situations where employees are moving to various job sites and clocking in/out needs to be tracked by site.

IPSEML TimeIPS Email Automation

The TimeIPS Customizable Email, Email Automation and Email reminder module enhances email generation and content to better fit your needs and save time.

- Ability to create templates for most email messages sent by the system.
- Customize email content to include additional instructions such as relevant company policy, a contact person for questions, or how to avoid getting future messages.
- Customizable subject and message body, with option to remove standard message body if needed.
- Ability to run sign-off report and custom report (if IPSRPT module is installed) on an automated basis.
- Select report format, report parameters, date range to run.
- Specify one or more email recipients and an optional FTP upload of the generated report.
- Ability configure reminders for a number of common situations.
- Each reminder can run for a single employee or a group of employees. In this context, "run for" means to consider these employees for when reminders should be sent. For example, on an anniversary date or birthday.
- Specify one or more email recipients for the email. This allows notification to go to a manager, empolyee, or several people who may need to see the alert.
- The content of each reminder can be completely customized using the email template system.

IPSEMP TimeIPS 10 Additional Employees

Expand your TimeIPS system with support for additional employees. This module adds 10 additional employees to the maximum supported by your current system.

IPSEPC Custom Payroll Export

The Custom Payroll Export module allows for payroll exports with completely customizable formatting.

- Powerful Custom Payroll Export
- Unlimited, fully mappable fields.
- User defined headers and footers.
- Embedded spreadsheet formulas with row references.
- Per-cell expression evaluation for advanced formatting and customizable logic.
- Multi-level sorting, totaling and summarizing options.
- Automatic report chaining to combine multiple report formats into a single file.

IPSEPI Enhanced Payroll Integration

The Enhanced Payroll Integration module supports many additional payroll exports. Please view our secure.timeips.com description for the complete list.

IPSHOTSCH Hot Schedules Integration

The Hot Schedules Integration Module (IPSHOTSCH) synchronizes employee's start times into their TimeIPS employee schedule for use with email deviation alerts and MyTimeIPS - My Schedule view.

- The TimeIPS Hot Schedules Import module allows employee schedule information to be automatically imported from an external "Hot Schedules" account.
- The synchronization process can be configured to run automatically on a periodic basis.
- Schedules are set two weeks in arrears and two weeks ahead, allowing reporting on past weeks and visibility to future weeks.

IPSIAPI TimeIPS Import/Export API

The IPSIAPI module is a programming API that allows automated import and updates using custom scripts. The TimeIPS Import/Export API Module provides the following features:

- Programming API to allow automated import and update using custom scripts
- Supports Employees, Jobs, ID/Badge Mappings and more

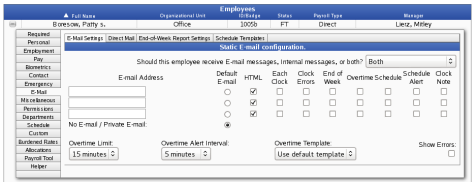
IPSIMP Employee Import/Export

The IPSIMP Data Export/Import Module allows users to import, export, and update employees, jobs, departments, benefit totals, and much more.

- Employee Information
- Department Information
- Payroll Types
- Benefit Totals
- Jobs
- Job Categories
- Job Customers

IPSIPS Intelligent Personnel System Upgrade

The IPSIPS Intelligent Personnel System Upgrade Module upgrades TimeIPS Digital Time Clocks to Intelligent Personnel Systems which include numerous system enhancements such as:



- View weekly work schedules, set e-mail alerts and notifications for schedule deviations, and prevent early clock-ins.
- Track exact time spent on specific jobs/projects with up to 30 active Jobs.
- E-mail nightly backups to a specified address.
- View currently clocked in employees on a computer monitor near the clock in/out point by connecting it directly to the TimeIPS time station.

IPSJOB Real-Time Job/Project Tracking

The Real-Time Job/Project Tracking module provides tracking of unlimited* active Time-Validated (clock in / clock out) jobs or projects. Each job can have a billing rate and a pay rate, and the pay rate can be different for each employee.

- Allows the creation and management of large numbers of jobs
- Each job can have a Category, Billing Rate, GL number, Control Number and Customer
- A per-job pay rate can be set for work done by employees on the job
- Per-job pay rates include hourly-rate for the job (i.e. $10.00/hour), pay differential per job (i.e. +$2.00/hour) or pay rate multiplier (i.e. 125%)
- Option to set per-employee overrides on the per-job pay, including all the above options
- Option to specify a "job manager" who can view and edit times of any employees who work on their job and who can run reports that include all time on their job, even if they are not the manager of the employees.
- Each employee can have a default job. This is the job they will automatically be working if they don't specify a different job when they clock
- When used in conjunction with the TimeIPS Scheduling module (IPSSCH) automatic job changes can be performed at scheduled times to provide shift differential pay
- When used in conjunction with the TimeIPS Scheduling module (IPSSCH) default jobs can be set for each employee at scheduled times
- When used in conjunction with the TimeIPS Advanced Overtime module (IPSOTO) jobs can be set as standard time, overtime, doubletime, or premium time and can be set to count (or not count) toward overtime calculations. Ideal for paid breaks or special pay outside of normal work hours.
- Payroll reports are fully aware of job differential pay and use it to calculate "base pay" for overtime calculations per federal labor law requirements

Ideal for use in the following applications:

- Assembly and production-based companies
- Professional services firms
- Retail or food service businesses
- Outsource services firms
- Any business that needs the ability to track time and money spent on jobs or projects in real time

* The number of jobs and projects that can be tracked is limited only by the TimeIPS server hardware.

IPSJWO Job WorkOrders

This upgrade module provides the ability to create work orders. Each work order can contain one or more jobs, with specific details for what needs to be done on each job.

This is ideal for businesses involved in production, assembly, fabrication or service type work where multiple jobs with specific instructions are required for each customer project and the time on each set of jobs needs to be tracked under a single work order number.

- Allows the creation and management of work orders
- Each work order can have a Customer, Name, Code, Start Date, Due Date and PO number set.
- Jobs can be assigned to the work order, and the order in which the jobs must be performed can be set and re-arranged
- A bar-coded PDF page can be generated and printed for each work order. This can be used by employees to clock into the work order so that the jobs on the work order can be tracked.
- Must be used with IPSIPS (provides 30 jobs). If you have more than 30 jobs, also purchase IPSJOB.

IPSLNK Custom Links

The IPSLNK - Custom Links Module is an expansion module to the TimeIPS system that allows the creation of custom links to external web pages and file repositories. These links can facilitate employee self-service and can help organize and unify document access.

- Allows creating custom static links with descriptions per company/division.
- Allows creating custom dynamic links to files located on an FTP server. Dynamic links can be configured to scan an FTP folder, identify files that match employees by parts of the filename, and present access to those files by relaying them through the TimeIPS system for security.
- Benefits include:
  - Ability to provide employees with links to external documents and resources
  - Unified location for employees to access various files and resources
  - Access restrictions based on TimeIPS hierarchical permission system.

IPSLOGIN Login Integration (LDAP, etc.)

The TimeIPS Login Integration module allows employee passwords to be validated by an external system instead of the TimeIPS built-in password database.

Current supported external systems:

- **LDAP**

IPSMMA Manager Mobile Application Clocking License

This Manager Mobile Application clocking license allows one mobile device to run the TimeIPS mobile clocking applet for a single manager employee.

- Allows a single manager employee to clock using a mobile device.
- Add as many licenses as needed for number of managers with mobile devices.
- Each clock-in/out is tagged with the location based on GPS (if supported in the mobile device).
- Ideal for situations where managers of a crew of employees are moving to various job sites and clocking in/out needs to be tracked by site.
- Manager can view list of employees, clock employees in/out, enter benefit time for employees and check employee schedules.

IPSOTO Over Time Options

The Over Time Options module provides extensive and advanced overtime rule options:

- Set Daily Overtime and Doubletime Options: For each day of the week, set the number of hours worked before Overtime or Doubletime goes into effect. his allows for rules such as any work on Sunday is paid at Doubletime, or work after 4 hours on Friday is Overtime.
- Additional Overtime Level for Premium Time: Additional overtime level for Premium Time. This allows for Doubletime-and-a-half, or other user-defined pay multiplier level as needed.
- Holiday Time can be Overtime or Doubletime: Set work done on a Holiday to be either Standard Time, Overtime, or Doubletime.

IPSPAPI - TimeIPS Payroll API

The IPSPAPI module is a programming API that allows customers to programmatically interact with the TimeIPS payroll subsystem to produce reports that include overtime, shift differentials, etc.

IPSPRM Enterprise Permissions

The Enterprise Permissions Module provides:

- Ability to create and manage permission groups that grant access or control over user-selectable groups of items.
- The items that can be controlled are virtually everything in TimeIPS. For example: employees, jobs, departments, employee pay rate, job codes, work orders, etc.
- The access or control levels include viewing, creating, deleting, and editing.
- Which items have access or control can all be based on the item being managed by you, being in your department, being in a site you manage, being in your division, being in a division you

manage, etc.
- Employees can be assigned to one or more permissions groups. Thus, each employee will get the sum of all permissions granted by all groups assigned to them.

IPSPWT Piecework, Tips, Commissions and Bonuses

The Piecework, Tips, Commissions and Bonuses Module provides:

- Allows the creation and management of custom piecework items.
- Each piecework item can have monetary pay, or can be fractions-of-an-hour pay.
- Piecework pay rates can be set for all employees with exception/override for selected employees.
- Pay codes can be set per piecework for cost tracking and allocation.
- Pay for piecework is computed into FLSA base rate for the week to facilitate labor law pay compliance.

IPSQBI Payroll Integration with Benefits Tracking

The Payroll Integration and Benefits Tracking module offers basic benefit time tracking as well as supporting the export of payroll information to a multitude of formats.

- Define custom work weeks for employees.
- Track employee benefit usage.
- Automatically accrue benefits based on start date with two tenure levels.
- Automatically apply holiday pay to identified payroll types.
- Supports ten popular payroll export formats, including Quickbooks, ADP and Paychex

IPSREM PC (Web) based Clocking for Mobile Devices

This block of Remote PC licenses allows up to 10 employees to clock in and out via their desktop PC or any network conected device with a web browser, including a laptop, netbook, web-enabled cell phone, PDA or kiosk.

Ideal for remote work sites or anywhere mobile employees must be able to clock or change jobs without access to a TimeIPS station.

- Allows employees to securely* clock in, clock out, change jobs and check their status on TimeIPS
- Add as many as needed for number of employees to service
- Employees can leave job/clock notes with each clock event

* Remote web-based clocking requires username and password for each employee. Encrypted clocking with SSL encryption is available with our Enterprise Security module.

WEB BROWSER

IPSREMDTC Remote Clocking License for 1 Desktop/Laptop

This remote clocking license allows one computer to run the TimeIPS desktop/laptop clocking applet. Normally used in conjunction with the BIO-OPT-USB TimeIPS USB biometric scanner, sold separately.

- Allows unlimited employees to clock using one copy of the TimeIPS desktop applet.
- Add as many licenses as needed for number of computers where employees clock.
- When used with the TimeIPS biometric scanner (BIO-OPT-USB), allows biometric authentication of desktop/laptop remote clocking.
- Ideal for situations where biometrics are needed but a standard TimeIPS Network clock is not suitable for the environment.

IPSREMDTE Remote Clocking via Desktop/Laptop for 1 Employee

This remote clocking license allows one employee to clock using the TimeIPS desktop/laptop clocking applet. Normally used in conjunction with the BIO-OPT-USB TimeIPS USB biometric scanner, sold separately.

- Allows one employee to clock using the TimeIPS desktop applet.
- Add as many licenses as needed for number of employees who will clock from computers.
- When used with the TimeIPS biometric scanner (BIO-OPT-USB), allows biometric authentication of desktop/laptop remote clocking.
- Ideal for situations where biometrics are needed but a standard TimeIPS Network clock is not suitable for the environment.

IPSRPT TimeIPS Custom Reporting

TimeIPS Custom Reporting includes:

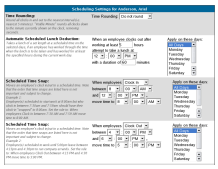
- **Site Summary Report** - A custom special report that allows data to be filled in on a spreadsheet template. Output is summarized by Site, with a separate page for each site. (Also requires at least one IPSSITE module). See support.timeips.com for more details.
- **Custom Payroll Report** - A special report that allows the custom payroll engine to be used on any selected dates, for any selected employees to generate custom reports. Supports custom fields, headers, summary, sorting, formatting, paycodes, stored templates and more. Supports standard ascii text files (csv). Also includes direct output to xls, pdf and html with colors, fonts, background control, merged cells and prioritized styles.

IPSSAPI TimeIPS Server API

The IPSSAPI module is a programming API that allows automated server functions using custom scripts. The TimeIPS Server API Module provides the following features:

- Programming API to allow server fuctions using custom scripts
- Supports Employees, Passwords, Jobs and more

IPSSCH Scheduling



The Scheduled and Automatic Clock Control feature allows you to:

- Round time up or down to the specified minutes.
- Snap work start or end times to a specific time based on clock in/out time range.
- Automatically deduct break or lunch time based on hours worked in day.
- Group clock in/out employees.

IPSSDIV Sub Division

TimeIPS Sub Divisions are designed for companies that need separation of responsibility and visibility based on where the work is done, rather than who did the work. For example, a PEO may have employees that work for multiple clients. If each client is in a sub-division, they would only see the work done for them. They would not see work done for other clients, even when employees work for multiple clients. In another example, managers responsible for distinct areas in a business may need control over time spent in their area, but not over any other work done by the same employees.

The TimeIPS Sub Diivision module provides the following features:

- Ability to create as many Sub Divisions as needed.
- Each Sub Division provides separation for work done by employees.
- Employees can work in multiple Sub Divisions.
- Each clock can be assigned to a Sub Division, so that all work done at the clock automatically connects to the Sub Division.
- Managers of Sub Divisions can be configured to set permissions for responsibility and visibility.

IPSSEC Enterprise Enhanced Security

The Enterprise Security Tools provides additional security functionality.

- Create or upload a security certificate for secure TimeIPS web pages.
- Generate a CSR signing request for your certificate allowing an authority to sign your certificate so browsers recognize your pages as secure automatically.

IPSSFT Shift and Shift Differential

The Shift and shift differentials module provides shift and shift pay controls:

- Allows the creation of multiple shifts, with customer specified names.
- Hours worked on a shift can be manually entered.
- Time can be entered for multiple days and multiple employees at one time.
- Assignment of employees to shifts and tracking over time
- Unlimited pay differentials per shift, including start, stop, duration and repeat for each
- Counts toward overtime option per shift differential
- Pay Type (Standard Time, OverTime, DoubleTime, etc.) per shift differential

IPSSITE Site Management

The TimeIPS® Site Management Module provides the following features:

- Each module provides an additional site.
- Additional modules can be purchased for large installations with many sites.
- Each site can contain one or more TimeIPS clock stations.
- When used with remote clocking, sites can be defined by the IP address of the clocking computer.
- When used with telephone clocking, sites can be defined by the callerID of the calling person.
- Each site can restrict clock in/out to employees belonging to the site.
- Each site has open/close schedule with minimum and maximum clocked-in employees.
- Schedule violations can alert site supervisors and/or managers.
- If a site loses network connectivity, a designated list of phone numbers can become white listed for phone clocking.
- If a site loses network connectivity, it can present a custom message to employees, such as a number to call for phone clocking.
- Site managers can add employees to the site and can edit time punches for employees of the site.

IPSSYNC Automated Synchronization

The TimeIPS Automated Synchronization module allows employee and job data in TimeIPS to be synchronized with an external system.

- Custom mapping is available for fields from the external system to fields in TimeIPS.
- The synchronization process can be configured to run automatically as often as once per hour.
- Data in TimeIPS is always updated to match the data in the external system.
- Employees and/or jobs that are missing in TimeIPS will be created automatically.
- A master unique identifier is used for each employee and job to ensure correct matching with the external system.

Current supported external systems:

- **Sage MasterBuilder**

IPSVTE Visual Time Edit

The TimeIPS Visual Time Edit module allows employee work and schedules to be viewed and edited in a visual presentation.

Hardware Upgrades Available:

Relay Controls

- Activate a device such as a buzzer or door lock at a specified time or triggered by an employee clock in/out using a TimeIPS Relay Control.

TimeIPS Telephone Clocking System

TELEPHONE DIAL-IN

- Employees can remotely clock in/out, check status, listen to messages, and record a clock note over the phone using the TimeIPS Telephone Clocking System's menu options.
- Managers can use the Manager's menu to check status of employees, reset PIN numbers, and record messages for specific or all of his/her employees.
- Employee and Payroll Administrators can use the Administrator's menu to record messages for all employees.
- The TimeIPS Telephone Clocking System can be configured to deny complete or clock access from specific phone numbers and can require PIN numbers for clocking.

Backups

Backing up your TimeIPS data is critical. TimeIPS provides several backup options to ensure the safety of your TimeIPS data. Use the Backup Administration page to configure these options.

Module/Account Requirements

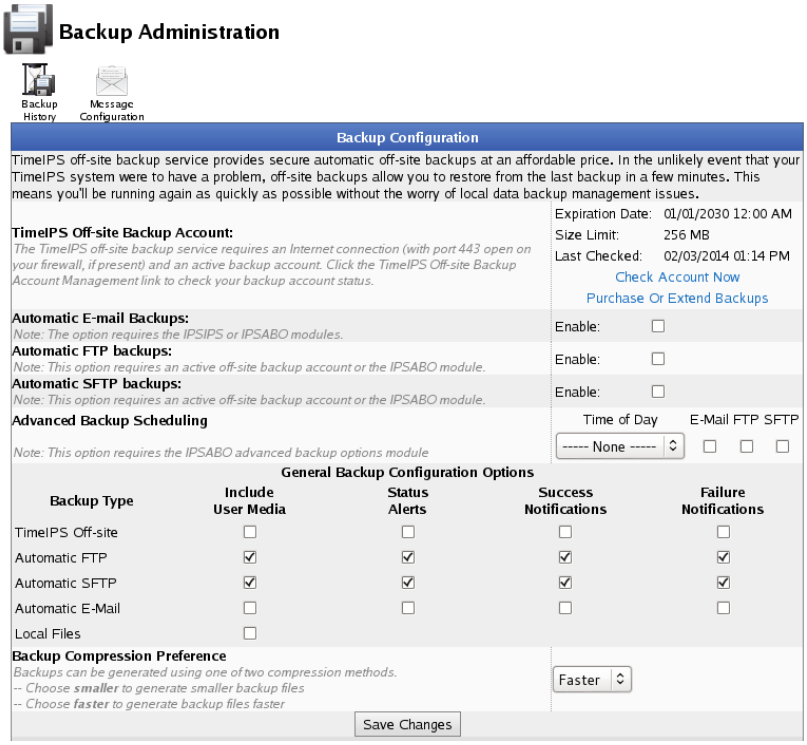
- TimeIPS Off-site backups require an active Off-site Backup Account. This can be purchased or extended by contacting your sales representative.
- Automatic and manual FTP/SFTP backups require either an active Off-site Backup Account or the Automatic Backup Options (IPSABO) module.
- Automatic E-mail backups require either the IPSABO or IPSIPS module. Manual E-mail backups can be sent at any time.
- There are no module or account requirements to create a backup as a local file to save to your personal computer.

Network Requirements

- If you are using TimeIPS Off-site backups and you have a firewall or router then certain ports must be opened. View the list of required ports on the Ports Used By TimeIPS article.
- If you are using FTP or SFTP backups then your TimeIPS server must have an open route to communicate with the FTP/SFTP servers you wish to use.
- If you are using automatic Email backups then your TimeIPS system mail server settings must be configured correctly.

NOTE: All TimeIPS backup options create an encrypted file of your TimeIPS data. You should not attempt to open the encrypted file as this can cause file corruption, destroying the integrity of your backup file. Only TimeIPS systems can decrypt and install a TimeIPS backup.

Using the left pane Main Menu » Administration, click on: System » Backups



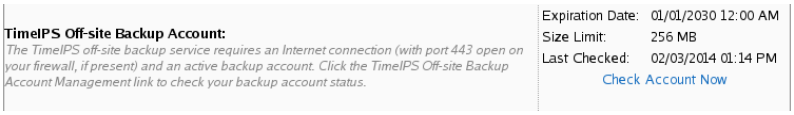
Content Included: Backups include all TimeIPS data including system settings but not network configuration. A TimeIPS system restored from a backup needs to have network settings reapplied. Backups include company logos and small employee photos up to 100k in size. Larger photos and company documents are not included unless you check the option to "Include User Media" in the general backup configuration.

Automatic Backup Configuration

Backups can be transmitted daily to TimeIPS Off-site Backup Servers, automatically to an E-mail address, FTP server, and/or SFTP server of your choice. Automatic backups to E-mail, FTP, and/or SFTP servers can be scheduled to happen at specific times of the day with the IPSABO module.

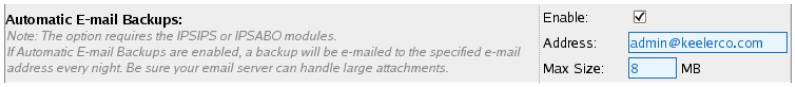
TimeIPS Off-site Backups

Backups can be saved as local files or off-site backups. Off-site backups provide the most security against disaster.



To increase your size limit or extend your backup expiration date for TimeIPS Off-site backups contact your sales representative. If you have recently purchased Off-site backups but they are not registering on your system you can click the "**Check Account Now**" link on the Backup Administration page.

Automatic Email Backups



To configure automatic E-mail backups begin by clicking the check-box next to "Enable." Supply the destination E-mail address and an optional value for max size. A max size of 0 will mean no maximum. Check that the E-mail server in question can handle large attachments. Options for E-mail in the general configuration options will apply as well.

Automatic FTP/SFTP Backups

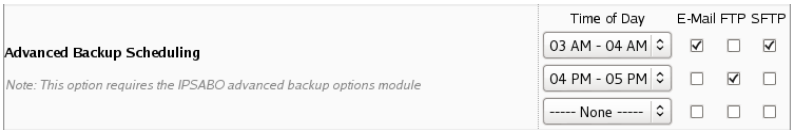
FTP and SFTP backups can both be configured to run automatically. Begin by clicking the check-box next to "Enable" for one or both methods.

- **Server:** Identify the FTP/SFTP server address to use. This can be an IP like 192.168.1.63 or a domain name like ftp.company.com
- **Port:** Identify the port number to use. Traditionally FTP uses port 21 and SFTP uses port 22

- **User:** Supply the user-name for TimeIPS to use when accessing your FTP/SFTP server
- **Password:** Enter the password for TimeIPS to use when accessing your FTP/SFTP server
- **Toggle Passive (FTP only):**Checking this box will cause TimeIPS to send the "passive" command before it attempts to upload the backup file. Whether or not this is necessary depends on the FTP server's configuration. When configuring FTP backup settings attempt to send a backup with Toggle Passive on. If the FTP upload fails then uncheck Toggle Passive and try again.
- **Path:** This is the path that TimeIPS will attempt to use when uploading your backup file. It can be an absolute path or it can be relative to the FTP user's default directory. If the directory does not exist or if the FTP user does not have permission to use it then the backup will still be uploaded to the FTP user's default directory.
- **Max Size:** Specify the maximum file size in MB to attempt to upload. A backup file that exceeds this size will not be transmitted. A value of 0 or blank means there is no maximum.

FTP and SFTP backups also follow the appropriate options selected in General Backup Configuration Options.

Advanced Backup Scheduling

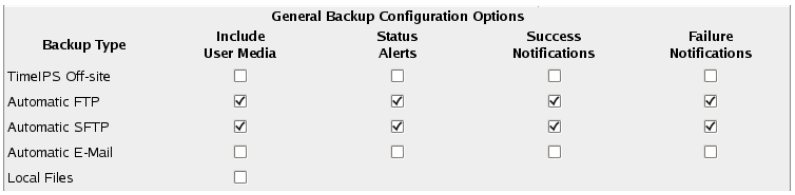


This option requires the IPSABO module. With IPSABO you can schedule the hour of the day that automatic E-mail, FTP, and SFTP backups will attempt to transmit. To add scheduled backups select a time of day from the drop down menu that says "None". To delete a scheduled backup change the time of day to "None". You can schedule one backup of each type to happen up to once per hour every day.

NOTE: To add additional scheduled backups, click the "Save Changes" button and then a new ------ None ------ drop down will appear.

If a scheduled backup fails to send for any reason it will be reattempted every hour until it is successful or until the system encounters another scheduled backup of the same type.

General Configuration

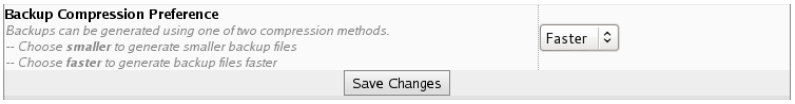


- **Include User Media:** Check this option to include large employee photos and company documents in your backup. This is disabled by default because it can drastically increase the size of your backups.
- **Status Alerts:** Check this option to be alerted by E-mail when a backup is within 15% of exceeding the maximum allowed size or when a backup exceeds the allowed size. Additionally, for TimeIPS Off-site backups this option will send E-mail alerts when the backup account expires or is about to expire.
- **Success Notifications:** Check this option to be alerted by E-mail when a backup is successfully created and sent. For automatic E-mail backups this option will only indicate if the E-mail was sent; it can not indicate if the backup was received by the target E-mail address.
- **Failure Notifications:** Check this option to be alerted by E-mail when a backup failed to be created or failed to be sent.

Alerts for FTP, SFTP, and E-mail backups go to the E-mail address on file for every Full Access user. If there are no addresses on file then alerts are sent to the admin E-mail address for the Top Level Division on the Company/Divisions page. Alerts regarding TimeIPS Off-site backups are sent to the admin E-mail address.

Backup Compression Preference

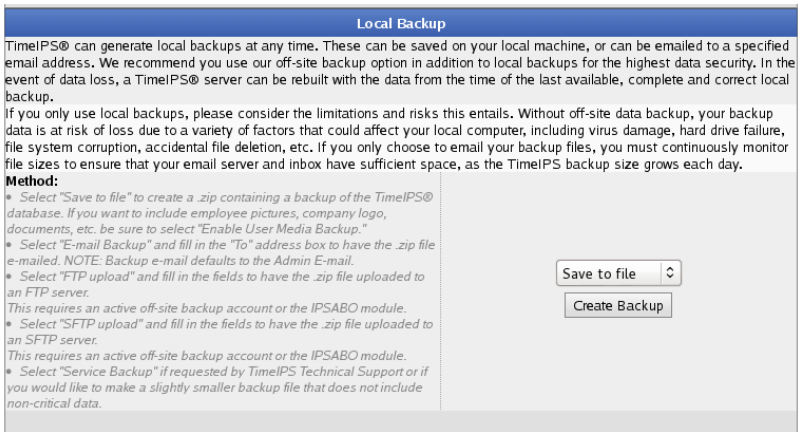
Backups can be generated using one of two compression methods.



- Choose **Smaller** to generate smaller backup files.
- Choose **Faster** to generate backup files faster.

Manual Backup Creation

Backups can also be transmitted manually to E-mail, FTP, and/or SFTP at any time or can be saved as a file on your personal computer. To manually create a backup scroll down to the **Local Backup** section.

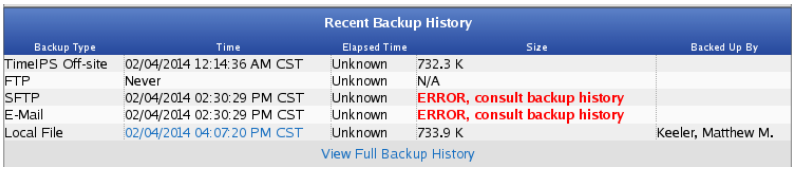


To create a local file backup leave the drop down selector on "Save to file" and click the **Create Backup** button. To manually send an E-mail, FTP, or SFTP backup select the appropriate option from the drop down list and click the **Create Backup** button. The page will refresh and you will be presented with the status of the backup as it is being created.

Once the backup is complete, it will appear in the Backup History table below along with a link to download the file. If you chose "Save to file" it is critical at this stage that you right click on the download link and save the backup file to a secure location.

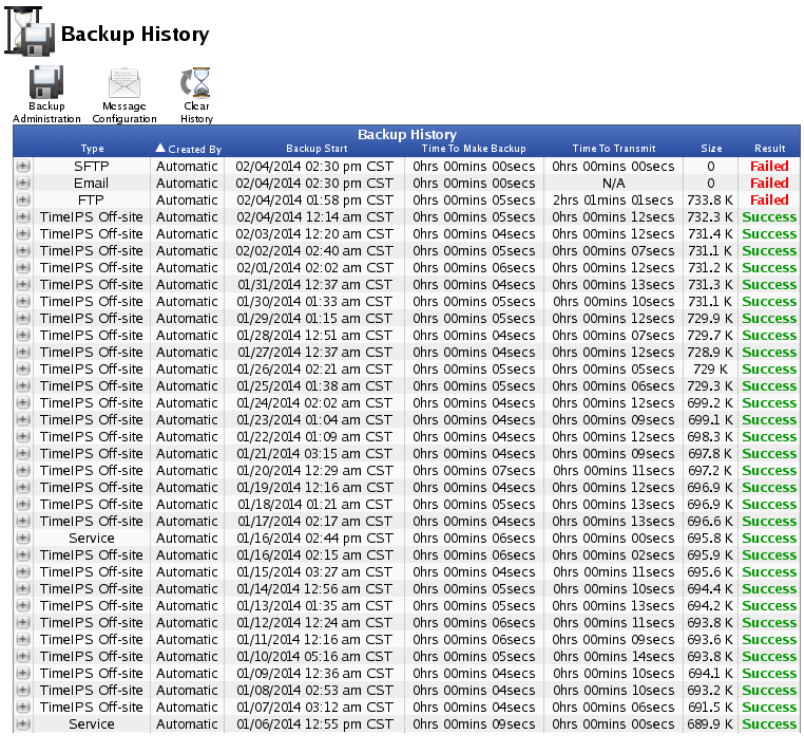
Backup History

To review your backup history scroll down to the **Recent Backup History** section



The table lists the results of the most recent backup for each type. If the time is blue it means your TimeIPS server still has the associated backup file which you can choose to right click and download.

To view your full backup history click on the **View Full Backup History** link or the Backup History icon at the top of the page.



Backup History

Type	Created By	Backup Start	Time To Make Backup	Time To Transmit	Size	Result
SFTP	Automatic	02/04/2014 02:30 pm CST	0hrs 00mins 00secs	0hrs 00mins 00secs	0	Failed
Email	Automatic	02/04/2014 02:30 pm CST	0hrs 00mins 00secs	N/A	0	Failed
FTP	Automatic	02/04/2014 01:58 pm CST	0hrs 00mins 05secs	2hrs 01mins 01secs	733.8 K	Failed
TimeIPS Off-site	Automatic	02/04/2014 12:14 am CST	0hrs 00mins 05secs	0hrs 00mins 12secs	732.3 K	Success
TimeIPS Off-site	Automatic	02/03/2014 12:20 am CST	0hrs 00mins 04secs	0hrs 00mins 12secs	731.4 K	Success
TimeIPS Off-site	Automatic	02/02/2014 02:40 am CST	0hrs 00mins 05secs	0hrs 00mins 07secs	731.1 K	Success
TimeIPS Off-site	Automatic	02/01/2014 02:02 am CST	0hrs 00mins 06secs	0hrs 00mins 12secs	731.2 K	Success
TimeIPS Off-site	Automatic	01/31/2014 12:37 am CST	0hrs 00mins 04secs	0hrs 00mins 13secs	731.3 K	Success
TimeIPS Off-site	Automatic	01/30/2014 01:33 am CST	0hrs 00mins 05secs	0hrs 00mins 10secs	731.1 K	Success
TimeIPS Off-site	Automatic	01/29/2014 01:15 am CST	0hrs 00mins 05secs	0hrs 00mins 12secs	729.9 K	Success
TimeIPS Off-site	Automatic	01/28/2014 12:51 am CST	0hrs 00mins 04secs	0hrs 00mins 07secs	729.7 K	Success
TimeIPS Off-site	Automatic	01/27/2014 12:37 am CST	0hrs 00mins 04secs	0hrs 00mins 12secs	728.9 K	Success
TimeIPS Off-site	Automatic	01/26/2014 02:21 am CST	0hrs 00mins 05secs	0hrs 00mins 05secs	729 K	Success
TimeIPS Off-site	Automatic	01/25/2014 01:38 am CST	0hrs 00mins 05secs	0hrs 00mins 06secs	729.3 K	Success
TimeIPS Off-site	Automatic	01/24/2014 02:02 am CST	0hrs 00mins 04secs	0hrs 00mins 12secs	699.2 K	Success
TimeIPS Off-site	Automatic	01/23/2014 01:04 am CST	0hrs 00mins 04secs	0hrs 00mins 09secs	699.1 K	Success
TimeIPS Off-site	Automatic	01/22/2014 01:09 am CST	0hrs 00mins 04secs	0hrs 00mins 12secs	698.3 K	Success
TimeIPS Off-site	Automatic	01/21/2014 03:15 am CST	0hrs 00mins 04secs	0hrs 00mins 09secs	697.8 K	Success
TimeIPS Off-site	Automatic	01/20/2014 12:29 am CST	0hrs 00mins 07secs	0hrs 00mins 11secs	697.2 K	Success
TimeIPS Off-site	Automatic	01/19/2014 12:16 am CST	0hrs 00mins 04secs	0hrs 00mins 12secs	696.9 K	Success
TimeIPS Off-site	Automatic	01/18/2014 01:21 am CST	0hrs 00mins 05secs	0hrs 00mins 13secs	696.9 K	Success
TimeIPS Off-site	Automatic	01/17/2014 02:17 am CST	0hrs 00mins 04secs	0hrs 00mins 13secs	696.6 K	Success
Service	Automatic	01/16/2014 02:44 pm CST	0hrs 00mins 06secs	0hrs 00mins 00secs	695.8 K	Success
TimeIPS Off-site	Automatic	01/16/2014 02:15 am CST	0hrs 00mins 06secs	0hrs 00mins 02secs	695.9 K	Success
TimeIPS Off-site	Automatic	01/15/2014 03:27 am CST	0hrs 00mins 04secs	0hrs 00mins 11secs	695.6 K	Success
TimeIPS Off-site	Automatic	01/14/2014 12:56 am CST	0hrs 00mins 05secs	0hrs 00mins 10secs	694.4 K	Success
TimeIPS Off-site	Automatic	01/13/2014 01:35 am CST	0hrs 00mins 05secs	0hrs 00mins 13secs	694.2 K	Success
TimeIPS Off-site	Automatic	01/12/2014 12:24 am CST	0hrs 00mins 06secs	0hrs 00mins 11secs	693.8 K	Success
TimeIPS Off-site	Automatic	01/11/2014 12:16 am CST	0hrs 00mins 06secs	0hrs 00mins 09secs	693.6 K	Success
TimeIPS Off-site	Automatic	01/10/2014 05:16 am CST	0hrs 00mins 05secs	0hrs 00mins 14secs	693.8 K	Success
TimeIPS Off-site	Automatic	01/09/2014 12:36 am CST	0hrs 00mins 04secs	0hrs 00mins 10secs	694.1 K	Success
TimeIPS Off-site	Automatic	01/08/2014 02:53 am CST	0hrs 00mins 04secs	0hrs 00mins 10secs	693.2 K	Success
TimeIPS Off-site	Automatic	01/07/2014 03:12 am CST	0hrs 00mins 04secs	0hrs 00mins 06secs	691.5 K	Success
Service	Automatic	01/06/2014 12:55 pm CST	0hrs 00mins 09secs	0hrs 00mins 00secs	689.9 K	Success

To **Clear** your full backup history click on the Clear History

icon at the top of the Backup History page.

Restoring From A Backup

To restore from backup with the backup file follow directions in Restore From Local Backup.

To restore from a TimeIPS Off-site backup follow directions in Restoring an Off-site Backup.

See Also:
Restoring From An Off-site Backup
Restore A Local Backup
TimeIPS Services, Including TimeIPS Offsite Backup Account
Backups

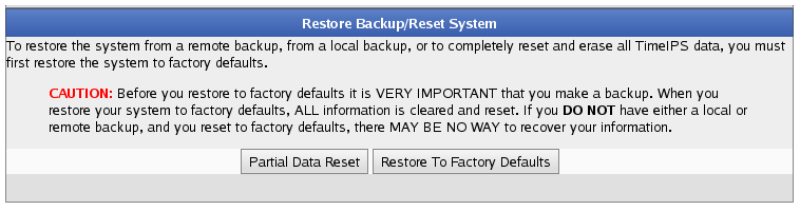
Partial Data Reset

TimeIPS allows select types of data to be cleared or reset. This is primarily used to remove test data on a new system, but can also be used to clear old and usused data on a mature system.

Before using any of these options, we strongly recommend making a backup of your data and contacting TimeIPS technical support.

Using the left pane Main Menu » Administration, click on: System » Backups

At the very bottom of the page is the **Restore Backup/Reset System** section.



- Clicking the **Partial Data Reset** button will bring up the following list of select types of data available for pruning, deleting and reseting.

Data Reset

TimeIPS Data Reset
☐ **Prune invalidated/incomplete payroll exports** *This will remove entries from the list of historical payroll exports that cannot be exported due to being "Invalidated" or "Incomplete". Doing this will remove all record of these exports, including who was included in the export, when the export was run, and why the export was invalidated. No data marked as "Pending" or "Exported" will be affected.*
☐ **Delete all payroll data** *This will remove ALL payroll export data from the system. All historical payroll exports, even those marked as "Exported", will be removed as described in "**Prune invalidated/incomplete payroll exports**" above. All worked time and workweeks will be considered unpayrolled and can be exported again. Holiday time not connected to holiday usage will be removed. Other holidays and benefit use will not be affected. Worked time will not be deleted. Payroll export configuration will be preserved.*
☐ **Delete all worked time** *This will remove ALL worked time from the system. In addition, all payroll data will be removed as described in "**Delete all payroll data**" above.*
☐ **Delete all workweek group associations** *This will disconnect all employees from any workweek groups they may belong to. After the data has been deleted, you will be prompted to provide new associations for all employees, as many reports, such as the sign-off report and payroll export, cannot be run without valid workweek group associations. In addition, all payroll data will be removed as described in "**Delete all payroll data**" above.*
☐ **Make current workweek group association always effective** *This will set all employees to belong only to the workweek groups they currently belong to, effective for all time. In addition, all payroll data will be removed as described in "**Delete all payroll data**" above.*
☐ **Prune unused workweek groups** *This will remove all workweek groups that are marked as deactivated and not associated with any employees for any time in history.*
☐ **Prune unused overtime policies** *This will remove all overtime policies that are not associated with any workweek groups for any time in history.*
☐ **Delete all accrual configuration** *This will remove all accrual groups and accrual rules from the system. Existing accruals and benefit use will not be removed. After new rules are configured, accrual calculations will continue starting at the end of the last completed accrual period.*
☐ **Prune invalidated/deleted accrual history** *This will remove historical records of accruals and benefit use that have been marked as deleted. Current accruals and benefit usage will not be affected.*
☐ **Delete all historical accruals** *This will remove all historical accruals and benefit resets. Accrual configuration and benefit usage will not be removed. Accrual calculations will be restarted from each employee's accrual start date.*
☐ **Delete all historical accruals and benefit use** *This will remove all historical accruals and benefit resets as described in "**Delete all historical accruals**" but will also delete all benefit usage, benefit requests, benefit approvals and benefit unapprovals. Accrual recalculations will be restarted from each employee's accrual start date. This will also delete all payroll data as described in "**Delete all payroll data**" above.*
☐ **Delete all accrual associations** *This will disconnect all employees from any accrual groups they may belong to, as well as removing historical accruals as described in "**Delete all historical accruals**" above. Accrual configuration and benefit use will not be removed. Accrual calculations will not continue for employees who do not belong to any accrual groups.*
☐ **Set all accrual associations to start on hire date** *This will leave all employees in the accrual groups they currently belong to, and will move the memebrship join date to their hire date. All prior accrual group memberships will be removed.*
☐ **Prune unused jobs** *This will delete all jobs that have not been used by an employee or work order. No existing worked time will be affected.*
☐ **Prune unused customers** *This will delete all job customers that are not associated with a job or work order.*
☐ **Prune unused job categories** *This will delete all job categories that do not contain any jobs.*
☐ **Delete all inactive jobs** *This will delete all jobs that are marked as "inactive." Any existing worked time will be disassociated from the removed jobs and will be changed to "-- None --".*
☐ **Delete all released employees** *This will delete all employees that have been marked as "released." All worked time, accruals, and benefit use for these employees will be deleted. Any employees managed by a released employee will become unmanaged. Any payroll exports, edits to worked time, or other such auditing information attributed to removed employees **will be reattributed to the administrator performing the delete operation**. Do not use this option if accuracy of this historical data is important.*
☐ **Prune inactive departments** *This will delete all departments that are not marked as "allow use." Any payroll export settings that refer to removed departments will also be removed.*
☐ **Prune empty sites** *This will delete all sites that are not associated with any employees, TimeIPS clock stations, telephone numbers, IP addresses, or jobs. Coverage information for removed sites will also be removed.*
☐ **Prune empty payroll types** *This will delete all payroll types that are not associated with any employees. Any payroll export settings or schedules that refer to removed payroll types will also be removed.*
☐ **Delete all employee schedules** *This will remove all daily/weekly schedules for all employees. Schedule group associations, schedule group settings, time snaps, time rounding, and automatic lunch deductions will not be affected.*
☐ **Delete all clock adjustment schedules** *This will remove all time snaps, time rounding, and automatic lunch deductions for all employees and types. Schedule groups and daily/weekly schedules will not be affected.*
☐ **Prune unused schedule groups** *This will remove all schedule groups that are not associated with any employees and all settings associated with them.*
☐ **Delete all schedule groups** *This will remove all schedule groups and all settings associated with them.*
☐ **Delete all fingerprint data** *This will remove all enrolled fingerprints. All employees using biometric authentication will be required to enroll again.*
☐ **Delete all voice recordings** *This will remove all voice recordings, such as clock notes and voiceprints associated with worked time.*

- Check the boxes to the left of the actions you wish to perform.
- Click the **Reset Selected Data** button to commit the reset.

WARNING: These operations are permanent and CANNOT BE UNDONE. It is strongly recommended to create a backup before performing any of these operations.

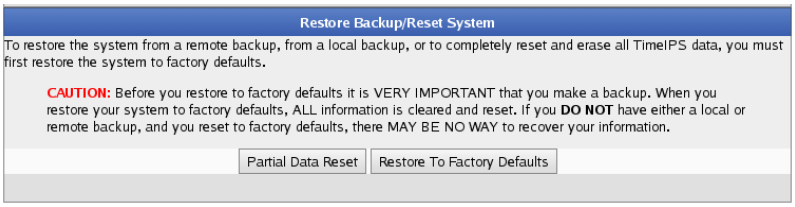
Restore To Factory Defaults

Restore to Factory Defauts will **ERASE ALL** data in the system. Therefore, before you restore to factory defaults it is very important that you make a backup. If you do not have either a local or remote backup, and you reset to factory defaults, there MAY BE NO WAY to recover your information.

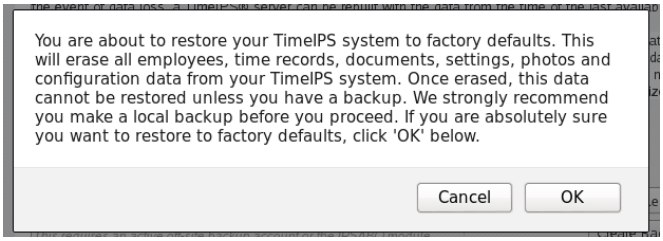
After performing a reset, the system can be configured as new, or a backup can be loaded.

Using the left pane Main Menu » Administration, click on: System » Backups

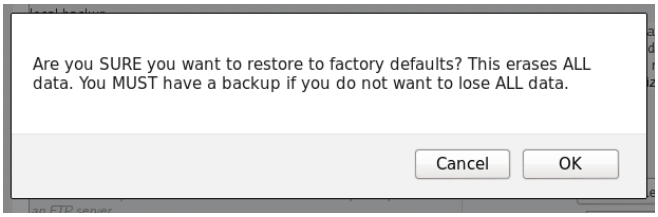
At the very bottom of the page is the **Restore Backup/Reset System** section.



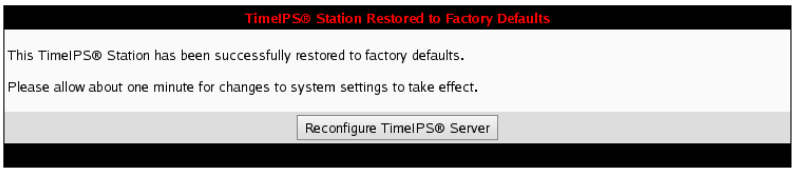
- Clicking the **Restore To Factory Defaults** button will bring up the following prompts.



- If you are absolutely sure you want to Restore to Factory Defaults, click the **OK** button.



- To really make sure you want to Restore to Factory Defaults, you will be asked again to confirm. Click the **OK** button to continue.



- Once the Factory Defaults have been restored, click the **Reconfigure TimeIPS Server** button.
- For instructions on restoring, see the **Restoring from a Local Backup** article.

Restoring from a Local Backup

Local backups can be used to restore your TimeIPS data to a new (or replacement) TimeIPS system.

To restore the backup:

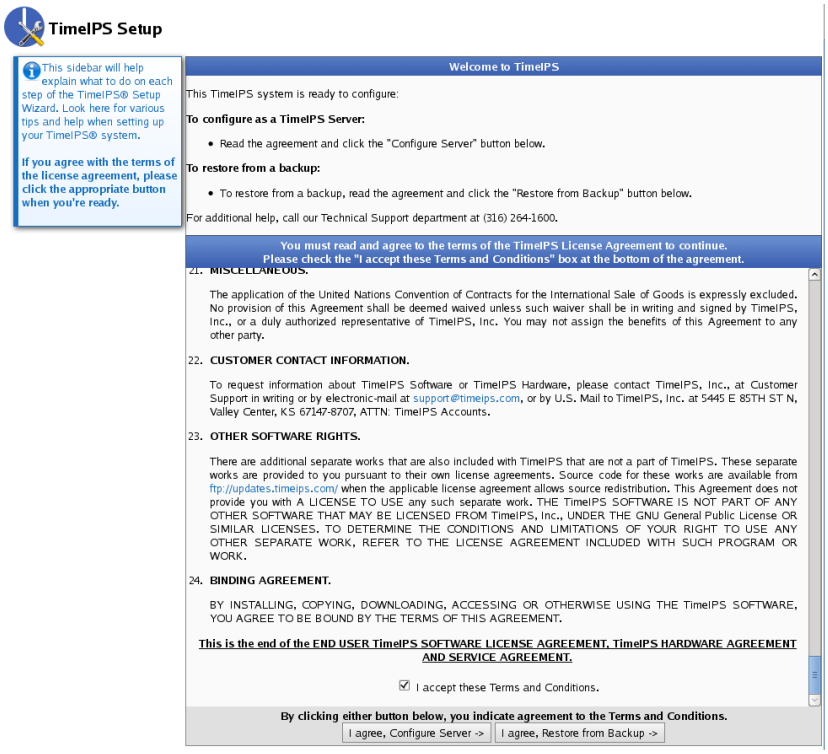
1. **Save the backup file** to your computer.

2. **Restore to factory defaults**. (This will take you directly to step 4. If the sequence is interupted, pick up at step 3.)

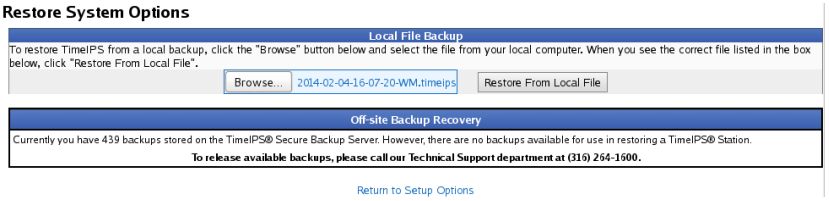
3. Browse to the IP address of your TimeIPS system.

   TIP: If you are not sure of the IP address for your TimeIPS system, and it is powered on, type the following on the small keypad to obtain the IP address of your TimeIPS system: +-00+- [ENTER].

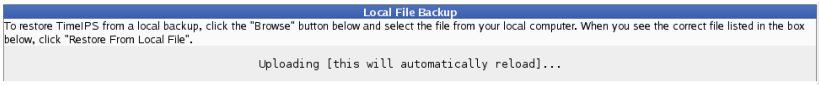
4. Accept the User's Agreement.
   - From the Setup screen, read the agreement and check the **I accept these Terms and Conditions** box at the bottom.
   - Then click the **I agree, Restore from Backup** button.

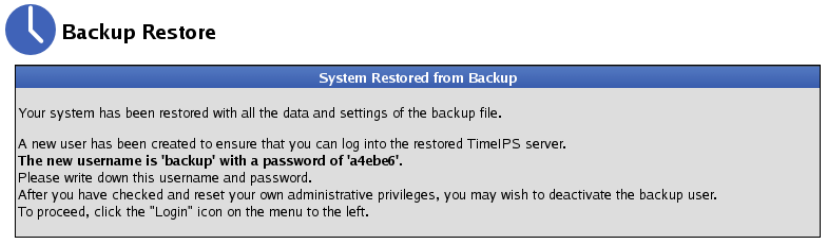


5. Click on the **Browse** button and select the file you saved to your computer in step 1, then click on the **Open** button.



6. Click on the **Restore from Local File** button. TimeIPS will load the data from the backup file.





NOTE: TimeIPS creates an employee named "backup, backup" in the Employee Administration section and generates a random password for user access. You can log-in with the "backup" ID and password if you have forgotten your original username and password. Once logged in, adjust your username and password and/or delete the employee record for "backup, backup".

- For instructions on how to delete the user "backup, backup", see the article on **Terminating/Rehiring Employees**.

Restoring an off-site backup.

- Confirm that you have an active off-site backup account and your system has successfully sent a recent backup (Administration - System Administration - Backups - View Backup History).
- Contact TimeIPS Customer Relationship Department to release the backup and for assistance in restoring your off-site backup: 877.846.3256.

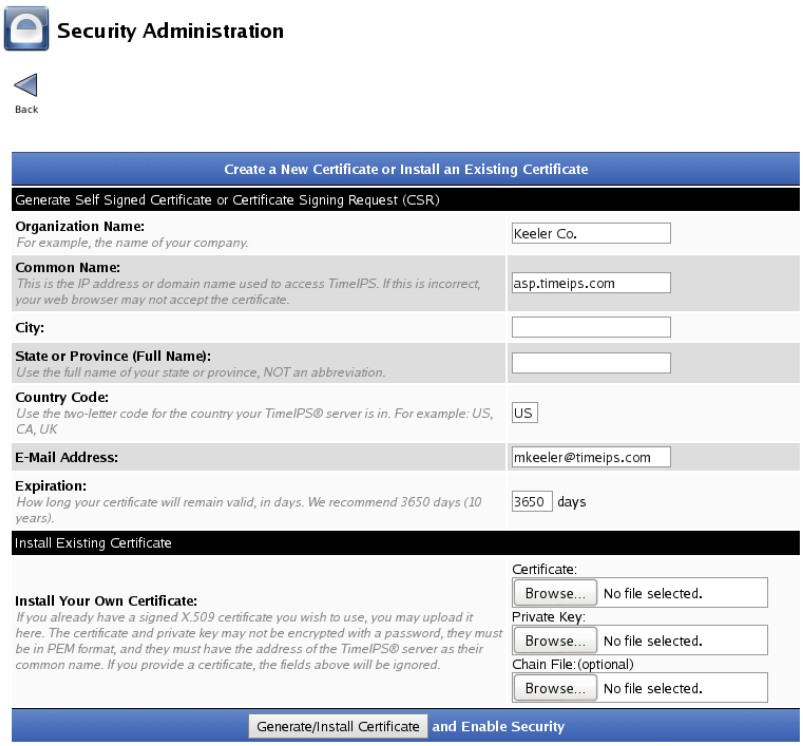
Internal Information (visible to Administrators only):

- TimeIPS CRM releases the backup by going to: http://updates.timeips.com/retrieve_backup/backup.php
- TimeIPS CRM to enter the Serial Number and Session ID(Serial Key) found in serial number registration info in Casefile Tracker and click on Submit Query. This will release the backups.
- Wait 1 full minute for backup to be accessible. Message will appear that Backups released for serial number:Axxxxxxxxx.
- Have customer select Restore from backup (click on Restore from Backup on setup page).
- Have customer enter Serial Number and Session ID(as the Backup Authentication Key) and select Download Remote Backup.
- Have customer Choose an off-site backup file from the drop-down list. Then, click "Get Backup" to begin the backup restoration process. A page will display showing the progress of the download. Once complete, they will get a Download Complete message to please click the continue button below. When they click on the continue button it will ask for the Backup account password. Have them enter on window and click the continue button.
- When they click on the continue button it will generate their backup password. Have customer login with the information provided username:backup and new automatically generated password.

Security

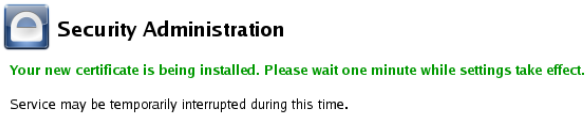
The Enterprise Enhanced Security Module (IPSSEC) adds client data encryption, secure web pages, enhanced firewall protection, and custom or auto-generated SSL certificates for added network security. To make use of the secure facilities of TimeIPS, you must first have a signed security certificate. You may select your certificate or create a new certificate.

Using the left pane Main Menu » Administration, click on: System » Security



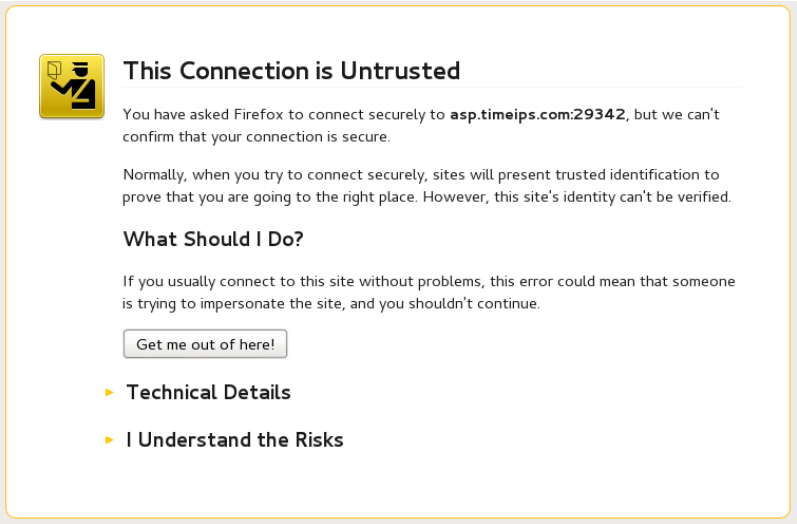
1. Enter your Organization's information.
   OR
   Click on the **Browse** buttons to select your **Certificate**, **Private Key**, and the optional **Chain File**.

2. Click on the **Generate/Install Certificate** button to generate/install the certificate and enable security.

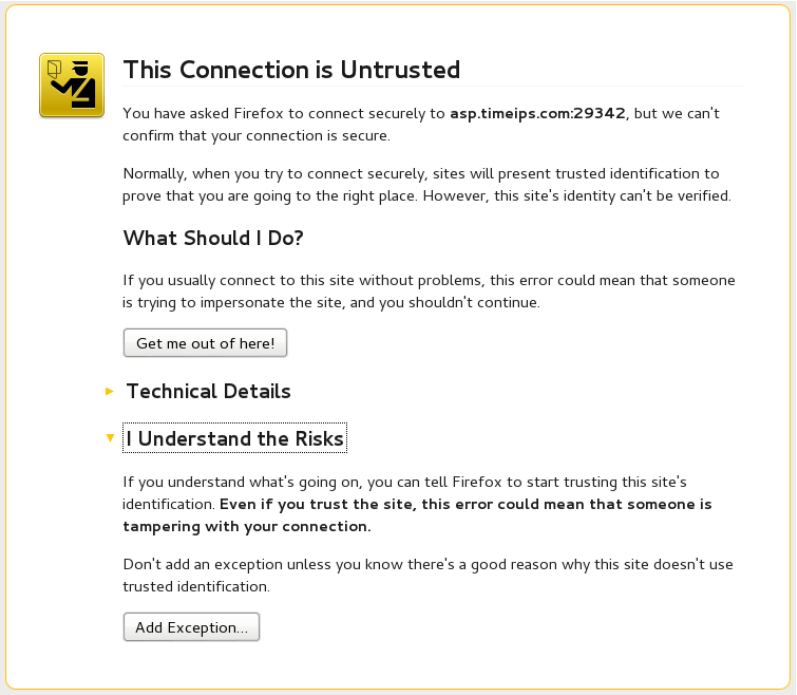


3. If you chose to **Install** your own signed certificate, the page will reload and the Certificate Administration information will display on the Security page. All TimeIPS web pages are now secured, designated by the "s" in **https://**

If you chose to **Generate** a new certificate, your browser will alert you and ask you to acknowledge that you trust this certificate.



- In Firefox, click on "I Understand the Risks".



- Click the **Add Exception** button.

- Then click the **Confirm Security Exception** button.
- This will take you back to the Security page with the Certificate Administration information displayed. All TimeIPS web pages are now secured, designated by the "s" in **https://**

See Also:
Modules/Upgrades

Warranty/Service

TimeIPS includes warranty and phone support services for a specified time period to ensure your company's success with TimeIPS. For information about extending your warranty or other services visit the Warranty/Service page or contact your TimeIPS sales representative at (316) 264-1600.

Using the left pane Main Menu » Administration, click on: System » Warranty/Service

Warranty and Service Information

Warranty and Support Options

Please review the warranty and support options below. We offer a range of options to suit businesses of all sizes and budgets. To review Warranty and Service Options, please call our Sales or Support team at (316) 264-1600 and we'll be glad to assist you.

Extended Warranty Service

This TimeIPS Server is an ASP service, hosted, serviced and maintained by TimeIPS. (Warranty service is not needed.) However, if you have TimeIPS network clocks, telephone clocking devices, or other hardware at your facility, you may still want to consider extended warranties. Please contact the TimeIPS sales team for assistance.

Technical Support

With an active TimeIPS support account, our TimeIPS Technical Support team will provide telephone and e-mail based assistance with setup and configuration of your TimeIPS system. This includes basic network configuration for TimeIPS and guidance on using the system.

To see the current status of your support account, log into our secure website, click on "My System" and look at the "Support Status" section.

Our Sales or Support team can assist you in purchasing Technical Support.

TimeIPS® License Agreement

END USER TimeIPS SOFTWARE LICENSE AGREEMENT, TimeIPS HARDWARE LIMITED WARRANTY AGREEMENT AND SERVICE AGREEMENT

NOTICE TO ALL USERS: BEFORE YOU CLICK ON THE CONTINUE BUTTON AT THE END OF THIS AGREEMENT, CAREFULLY READ THE FOLLOWING LEGAL AGREEMENT ("AGREEMENT") WHICH SETS FORTH THE TERMS FOR THE USE OF THE TimeIPS SOFTWARE LICENSE AND THE TimeIPS HARDWARE LIMITED WARRANTY PROVIDED TO YOU BY TimeIPS, INC. YOU ARE CONSENTING TO BE BOUND BY AND ARE BECOMING A PARTY TO THE FOLLOWING TimeIPS SOFTWARE LICENSE AGREEMENT AND TimeIPS HARDWARE LIMITED WARRANTY. IF YOU DO NOT AGREE WITH THE TERMS OF THIS AGREEMENT, DO NOT CLICK THE "CONTINUE" BUTTON AND DO NOT USE THE SOFTWARE. NOTE: BY INSTALLING, COPYING, DOWNLOADING, ACCESSING OR OTHERWISE USING THE TimeIPS SOFTWARE (DEFINED BELOW), YOU AGREE TO BE BOUND BY THE TERMS OF THIS AGREEMENT.

1. **GRANT OF LICENSE FOR USE OF TimeIPS SOFTWARE.**

Subject to the terms of this Agreement, TimeIPS, Inc., grants to you, the user, a personal, non-exclusive, non-sublicensable and non-commercial limited license to use the enclosed TimeIPS Software owned by TimeIPS,

- Review the options provided and click on the links to learn more about these helpful and time-saving services.

Internal Information (visible to Administrators only):

Warranty and Enhanced Service Support

In each installation, TimeIPS becomes a critical operating component of the business due to the cost effective and time saving benefits it provides. Employees, managers, supervisors and indeed the entire company, benefit greatly from the convenient and accurate real-time tracking of each clock event and the overall efficiencies TimeIPS offers.

To minimize the inconvenience of manually tracking time in the unlikely event of system malfunction, we provide additional warranty and service options under which we provide expedited repair or replacement of a system if necessary.

Please read the printed warranty included with your TimeIPS system for the exact terms and conditions of the warranty and replacement service included with your TimeIPS station.

See Also:
Modules/Upgrades
TimeIPS Store
Getting Started wtih TimeIPS
Warranty/Service
External Sync

TimeIPS Store

Using the left pane Main Menu » Administration, click on: System » TimeIPS Store

The TimeIPS Store link takes you to the TimeIPS products website which includes systems, employee identification devices, hardware, accessories, and enhanced services. It also includes information regarding optional modules, product registration, privacy notice, conditions of use, and a link to contact the TimeIPS Customer Relationship Department.

- You can shop and add items to your cart.
- When you are ready to checkout, contact our sales department to complete the transaction.

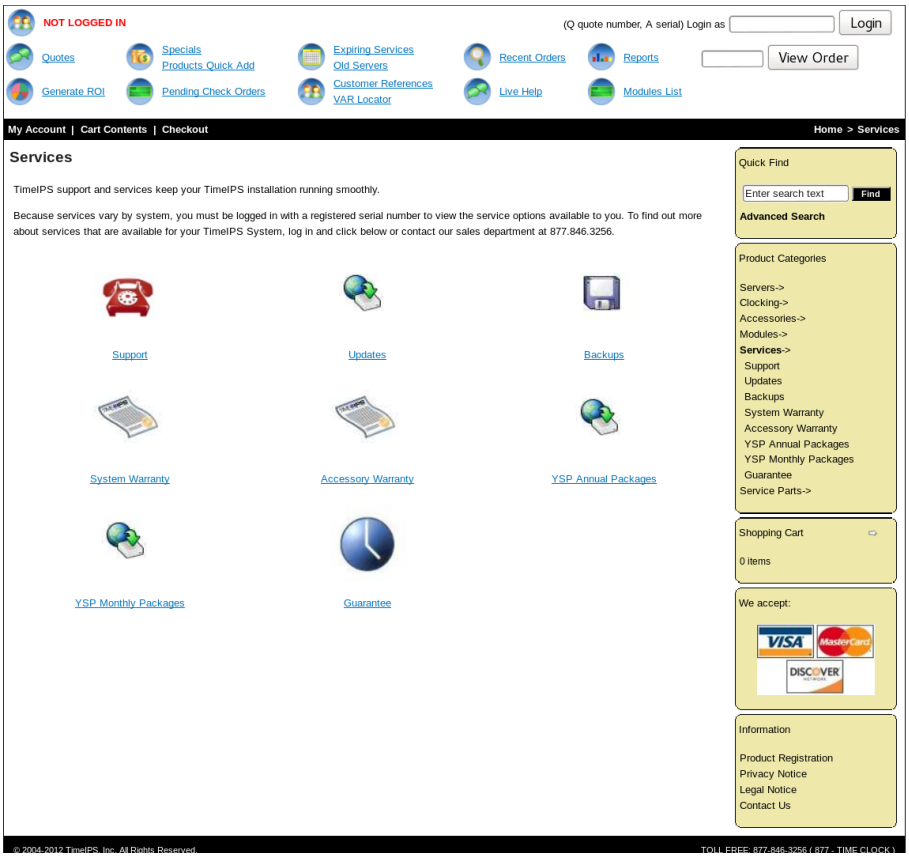
NOTE: For security reasons, all payment transactions are processed over the phone with a sales representative. Please call us at 877-846-3256.

See Also:
Modules/Upgrades
Warranty/Service

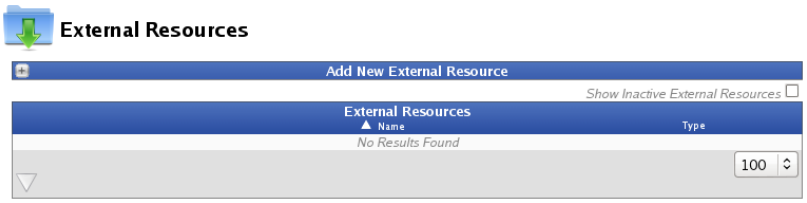
IPSLNK - Custom Links Setup

The IPSLNK Custom Links module allows you to present your employees with links to external sites (static resources) and/or file listings from an FTP server that you control (a dynamic resource). A common use case for this feature is to use TimeIPS as the interface for a document server already being hosted by your organization.

To access the External Resources configuration page you must have the "External Resources" permission. By default this is granted to the Full Access and Division Managers permission groups.

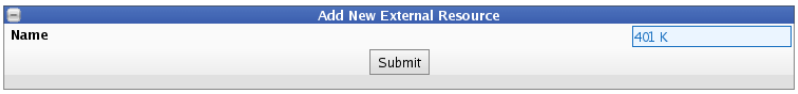


Using the left pane Main Menu » Administration, click on: System » External Resources.



To Add a New External Resource

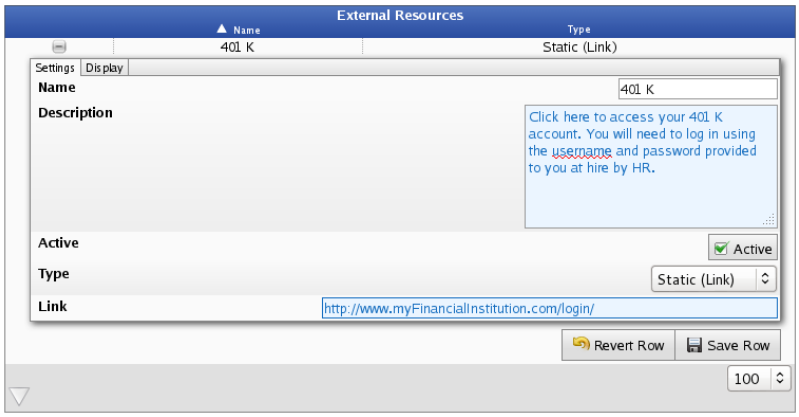
- Click on the **+** (plus) sign to the left of the **Add New External Resource** bar to expand the window.



- Type in the name of the resource. This name should briefly describe what you will be presenting to employees.
- Click the **Submit** button to add the resource.

Static Resource Configuration

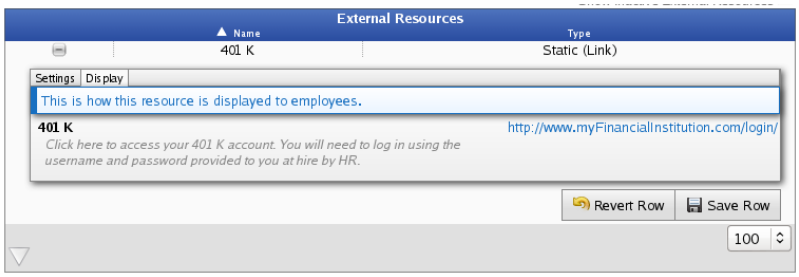
The **External Resources** table will list all resources configured for this division. Resources can either be static links or dynamic file listings. The type of resource will be identified next to the name. If you click on the plus next to the name you will be presented with the resource settings. What follows is an example of a static resource that provides employees with a link to their 401 K accounts.



- **Name:** This is the name that identifies the resource
- **Description:** This is a brief description of the resource. It will be presented to employees as help text.
- **Active:** Toggle this resource as active or inactive. Inactive resources will not be shown to employees.
- **Type:** Type can be either static or dynamic. Static resources are links which are presented to employees. Dynamic resources require additional configuration to parse an external server for file listings.
- **Link:** The example shown is a static resource so a link can be configured. Whatever is typed into this box will be presented to employees.

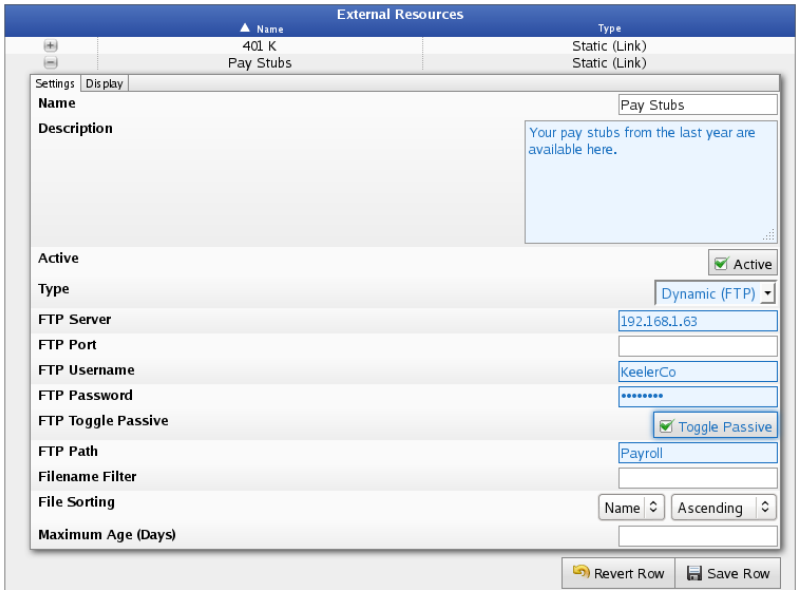
Static Resource Display

By clicking on either the display tab or by going to an employee's profile you can view the static resource as it appears to employees. Below is the display from the previous example.



Dynamic Resource (FTP) Configuration

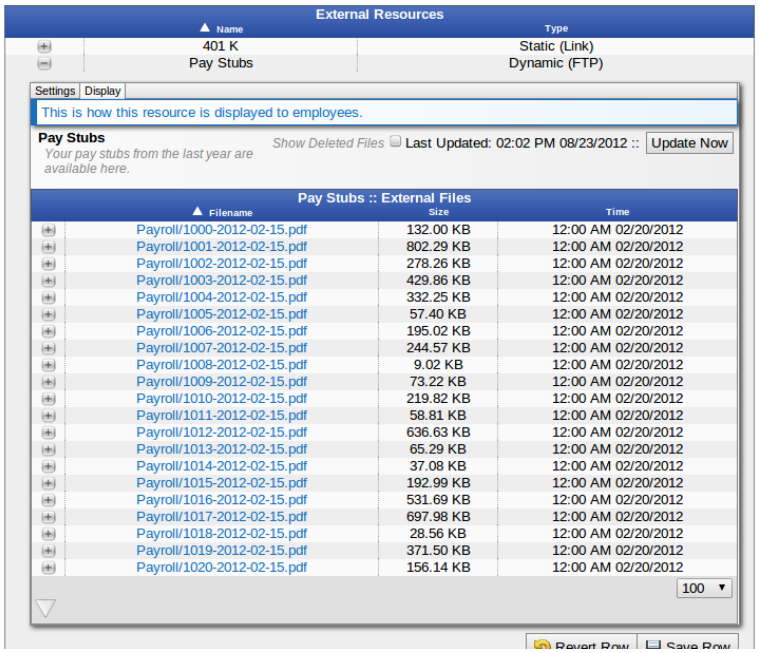
What follows is an example of the configuration of a dynamic FTP file listing.



- **Name, Description, Active, and Type:** These are the same as a static resource.
- **FTP Server:** This is the URL or IP address of the FTP server that hosts the files.
- **FTP Port:** This is an optional port to use when parsing the file listing. Leave it blank for FTP defaults.

- **FTP Username:** This is the username that TimeIPS will provide to the FTP server when logging on to download the file listings
- **FTP Password:** This is the password associated with the above username
- **FTP Toggle Passive:** If this option is checked then TimeIPS will toggle passive mode when connecting to the server.
- **FTP Path:** This is the path to the base directory of the file listing. If the files are in the home directory when the provided account logs on then this can be blank.
- **Filename Filter:** This feature allows you to restrict which files show and which employees they are shown to. More on this issue is detailed further below.
- **File Sorting:** Choose how to sort files when presenting the list to employees.
- **Maximum Age:** This is the oldest number of days a file can be before it is removed from the TimeIPS file listing. Leave this setting blank to show all files.

Dynamic Resource (FTP) Display



Files from the resource are shown in a list. The Time column is the last modified time reported by the FTP server. The last time the file listing was updated is shown at the top. An Update Now button is available to refresh the file listing. File listings can only be refreshed every five minutes.

From the administrative page you can click on the plus next to a file to see additional details such as an audit of the file's discovery, every attempt to download the file, and a note if the file ever appears to have been deleted from the FTP server.

Restricting File Access

The ability to view files from an external file server is restricted by two factors. First a file must be associated with an employee and secondly the person attempting to view a file must have permission to view resources for at least one of the file's associated employees. Files are associated with a employees through their file names. You must set a filename filter in the resource configuration to define which parts of the filename correspond to certain information about employees.

Filename Filters

The filename filter is a templated regular expression. Regular expressions define a pattern to match against a file name and if it matches within the context of a specific employee then it is considered associated with that employee. If you leave it blank then all files from this resource will be associated with all employees in the division. To learn more about regular expressions you can go to http://www.regular-expressions.info/

When we are filtering files with the regular expression provided we will attempt to match the entire file name. This means we will automatically add "^" before your expression and "$" after the expression. The file name includes any parent directories from the home directory of the FTP user.

You can template information about an employee in to your expression. You can use [HID] to represent their badge number, [empNum] to represent their alternate number, or [usersID] to represent their unique TimeIPS generated ID should you know it.

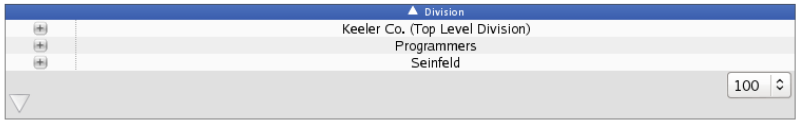
An example: I have an employee whose badge number is 1234. On my FTP server I store documents for this employee in the directory "ftp/docs/employees/1234/". I would define my filter as "ftp/docs /employees/[HID]/.*". The dot character "." will match any characters and the asterisk "*" will make the dot character match zero or more times. This means when an employee with badge 1234 goes to view external documents they will only see those documents below their directory.

External Sync

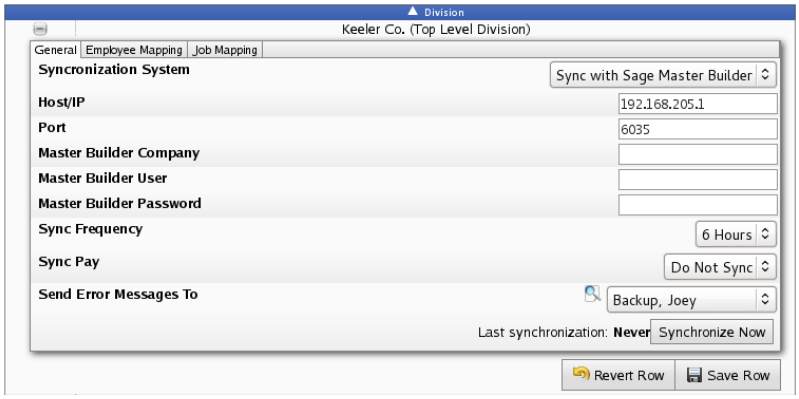
If you are maintaining your Employees in a separate system, such as Master Builder, you can configure TimeIPS to automatically fetch that information so that it will be available for Employee Clocking.

Using the left pane Main Menu » Administration, click on: System » External Sync

External Sync



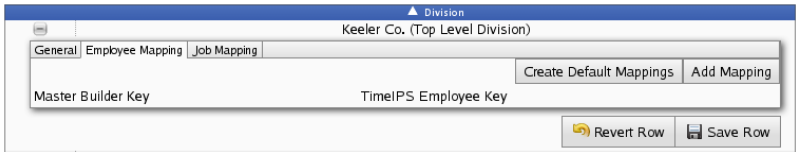
- Click the **+** (plus) sign to the left of the Division you want to sync.



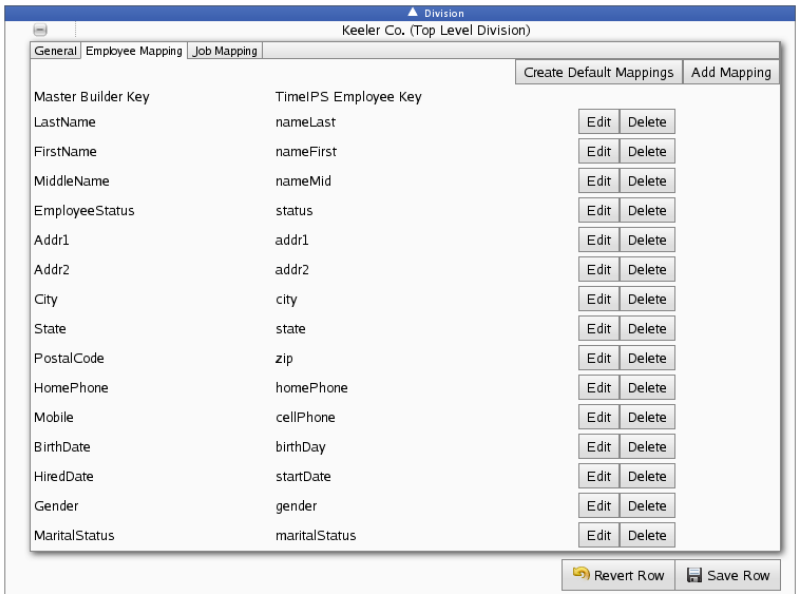
- Under the **General** tab, enter in your Master Builder information.

NOTE: Master Builder is the only External System currently configured for syncing.

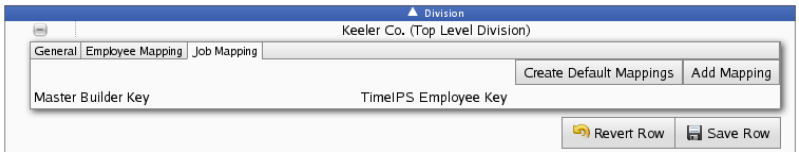
- Choose the **Frequencing**, whether or not to sync **Pay** information, and who is to receive **Error Messages**.
- Click the **Synchronize Now** button.



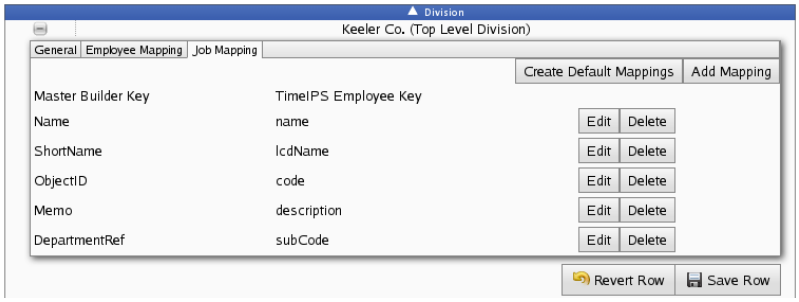
- Under the **Employee Mapping** tab, you can add default mappings and/or manually add a mapping.
- If you click the **Create Default Mappings** button, the following mappings will appear.



- To modify this list, click the **Edit**, **Delete**, or **Add Mapping** buttons.
- Click the **Save Row** button to save any changes made.



- Under the **Job Mapping** tab, you can add default mappings and/or manually add a mapping.
- If you click the **Create Default Mappings** button, the following mappings will appear.



- To modify this list, click the **Edit**, **Delete**, or **Add Mapping** buttons.
- Click the **Save Row** button to save any changes made.

See Also:
Modules/Upgrades
TimeIPS Store
Getting Started wtih TimeIPS
Warranty/Service
External Sync

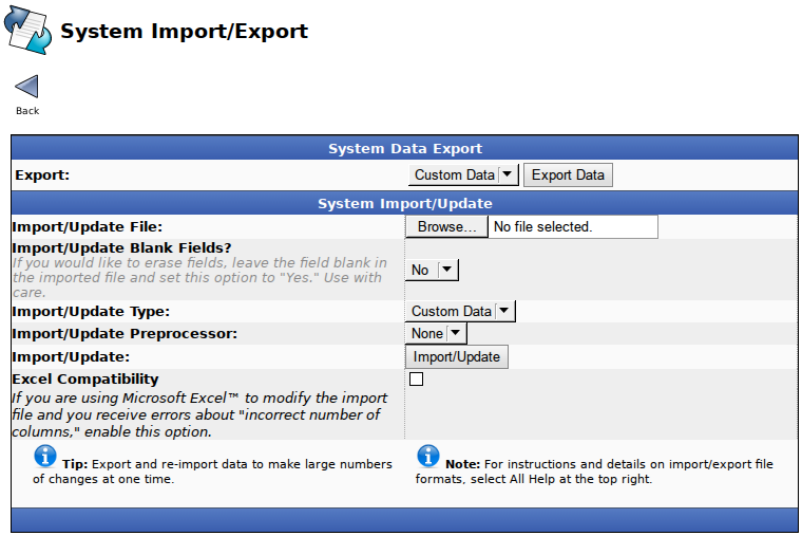
System Import/Export

TimeIPS can import Custom Data, Clocks and Divisions and can also update records using the Import/Export optional module.

The following import and export instructions are available for review.

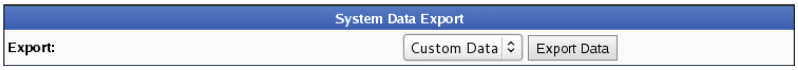
- Custom Data
- Divisions
- Clocks

Using the left pane Main Menu » Administration, click on: System » Import/Export



Export

By exporting Custom Data, Divisions, or Clocks, you create a template file to either fill in the necessary information or rename the field labels in your existing spreadsheet of information.



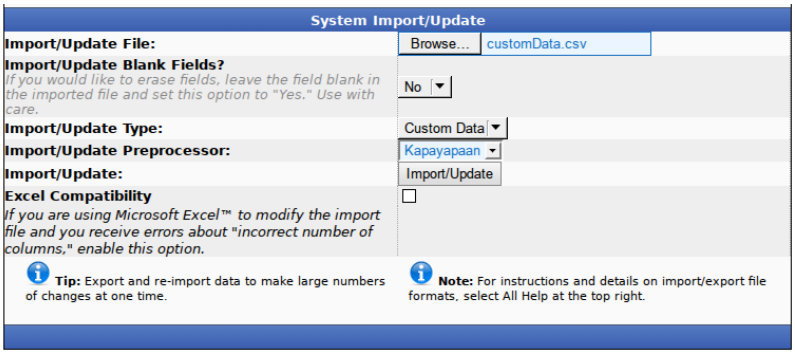
1. Export the information to create a template.
   - Select the type of data to Export: **Custom Data**, **Divisions**, or **Clocks**.
   - Click on the **Export Data** button to generate a template file and either save the file on your desktop/home directory or open it directly in a spreadsheet program such as Excel™ or OpenOffice Calc.

A	B	C	D	E	F
Custom Key Name	Custom Key	Custom Value Nam	Custom Value	Custom Key/Value N	Custom Key/Value Name Note
Employee Name	Dave Jones	Certification Level	3		Service Employees: Process Certification Level
Employee Name	John Smith	Certification Level	4	Certified for 3 years	Service Employees: Process Certification Level
Employee Name	Mark Jones	Certification Level	6	Lifetime Certification	Service Employees: Process Certification Level

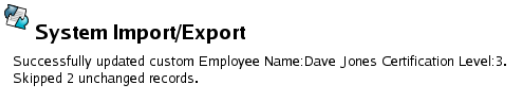
2. Adjust the spreadsheet as necessary.
   - If you already have a spreadsheet of the information you wish to import, open your existing spreadsheet and manipulate the column headers to match the field labels in the template you created in step 1.
   - If you do not already have a spreadsheet of the information you wish to import, enter the information into the template file you created in step 1.
3. Save the spreadsheet file of the information you wish to import as a Comma Separated (CSV) file.
4. Import the Information into TimeIPS.
   - If you make changes to the .csv file and would like those changes to take effect in TimeIPS®, use the "System Import/Update" function below.

Import/Update

Use the Import/Update feature when there are a large number of changes that need to be made at one time. If you wish to create your own file instead of using an exported template, view the detailed Custom Data, Divisions or Clocks instructions page.



1. Once the file is created, click on the **Browse** button and navigate to the CSV file to be imported.
2. Decide whether or not you want to **Import/Update Blank Fields**. If you would like to erase fields, leave the field blank in the imported file and set this option to "Yes." Use with care.
3. Choose which type of data to Import/Update from the drop down list: **Custom Data**, **Divisions**, or **Clocks**.
4. **Import/Update Preprocessors** provide a way to modify files before they are imported into TimeIPS. If you wish to use a Preprocessor, select it from the drop down box. (See the Import Preprocessor article for more information.)
5. Click on the **Import/Update** button.
6. Check the **Excel Compatibility** box if you are using Microsoft Excel to modify the import file and you receive errors about "incorrect number of columns".

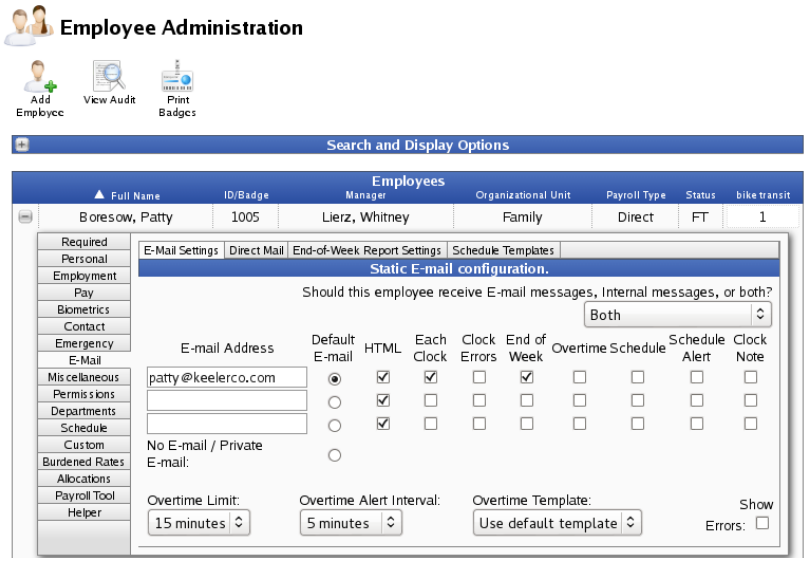


Cannot Send/Receive E-mails

NOTE: This is for non-ASP systems only. If you are using an ASP server and having issues with sending or receiving emails, contact TimeIPS technical support.

- **Generate a test e-mail for delivery to your e-mail address.**

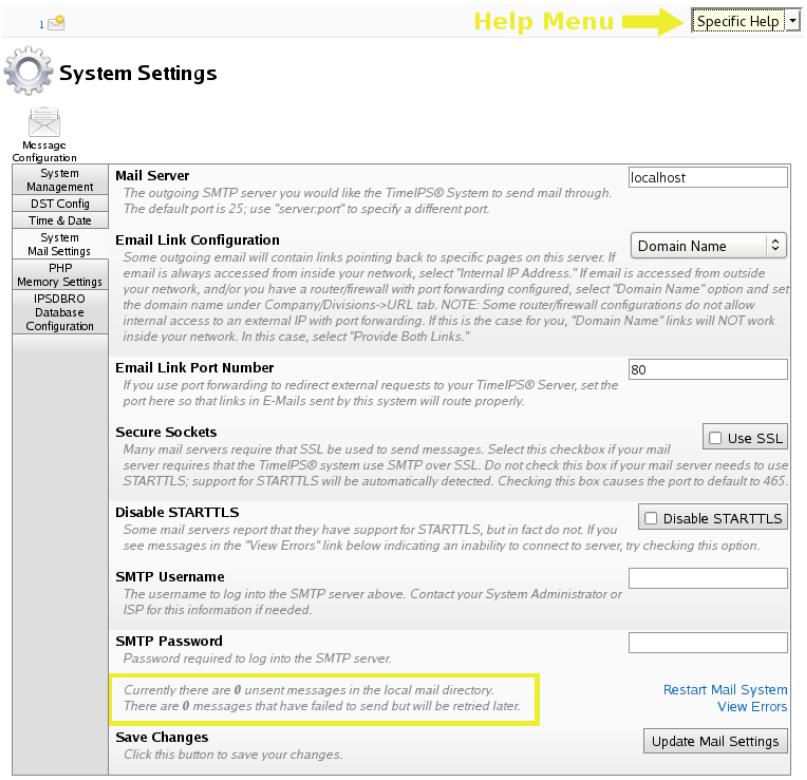
  1. Go to Employees » Employees.
  2. On the Employee Administration screen, click on your name to expand your record. Your Personal tab will display.
  3. Click on the Email tab.



4. Enter your e-mail address and check the **Each Clock** check box which will generate an e-mail each time you clock in and out.
5. Clock in or out to generate the e-mail alert.

- **Wait a few minutes and check the Inbox on your e-mail client (such as Outlook or Thunderbird) to see if the e-mail was received.**
- **Confirm that the e-mail was sent from TimeIPS.**

1. Go to System » System Settings. View the **System Mail Settings** tab.



2. Make sure to have either **Specific Help** or **All Help** showing. This option is available in the top right corner of any system page.
3. View the notes at the bottom under the **SMTP Password** section.

Currently there are 0 unsent messages in the local mail directory.

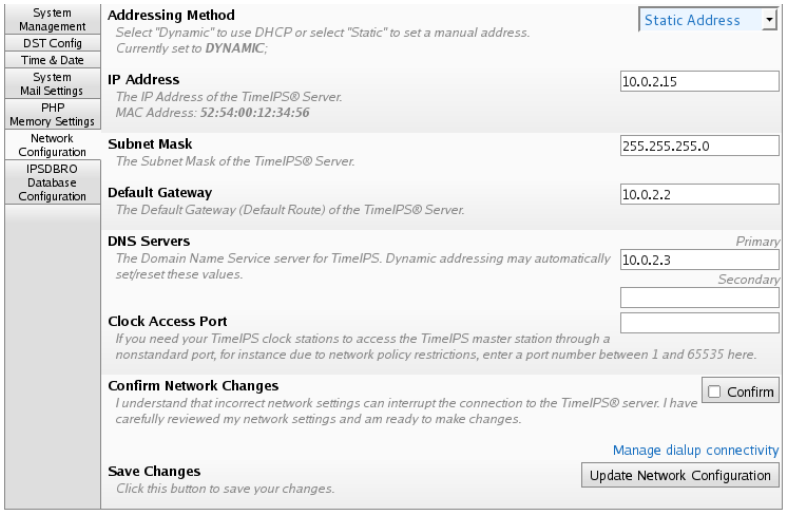
- The number of ***unsent messages*** indicates the number of emails waiting to be sent. TimeIPS attempts to send *Unsent Messages* approximately once a minute.

There are 0 messages that have failed to send but will be retried later.

- The number of ***messages that have failed*** indicates the number of messages TimeIPS has attempted to send multiple times but is unable to. Failed messages are retried approximately once an hour.

- **If there are *unsent messages*:**

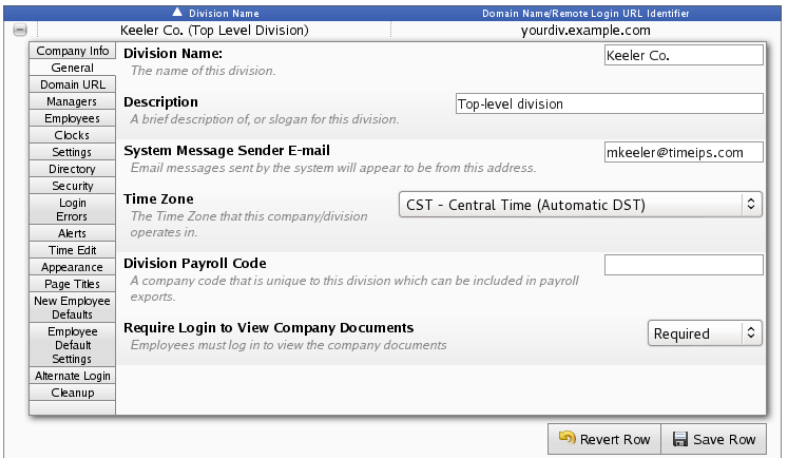
1. Wait 60 seconds then refresh the page. If there are still unsent messages, TimeIPS is unable to connect to the designated **Mail Server**.
2. Check your DNS settings.
   a. Go to System » System Settings. View the **Network Configuration** section.



   b. Confirm with your network administrator that the **DNS Servers** are valid servers for your network. If necessary, change the DNS Server settings.

TIP: The following are public DNS servers: 207.217.126.81 (primary) and 151.164.1.7 (secondary)

3. Check the "From" Address used for e-mail alerts.
   a. Go to System » Company/Divisions, General Tab



   b. Remove any punctuation from the **System Message Sender E-mail** on the General tab and from the **Company Name (No HTML)** on the Company Info tab.

NOTE: The reply address for emails sent from TimeIPS is the System Message Sender E-mail and the Company Name (no HTML). Some servers refuse to send e-mails from addresses with punctuation. Most versions of TimeIPS strip punctuation prior to sending the e-mail.

   c. Click on the **Save Row** button to save any changes.

- **If there are no *unsent messages***, TimeIPS has successfully sent the e-mail through the designated **Mail Server**.

1. If the Mail Server is currently "localhost", contact your network administrator or your Internet Server Provider to obtain a different **Mail Server**, **Mail Username**, and **Mail Password** that TimeIPS can use to send the messages.

NOTE: Many ISP's refuse messages sent from unknown servers through port 25. TimeIPS, therefore, allows you to identify the mail server TimeIPS should use to send the messages.

2. Check the spam filters on your e-mail client (such as Outlook or Thunderbird), to ensure that the messages are not being filtered. Refer to the user documentation for your specific e-mail client for further information.

- **Ensure that the proper ports are opened through your router.** See Ports used by TimeIPS

Internal Information (visible to Administrators only):

- Add support@timeips.com to the Time Reports/E-mail Alerts list. Check Each clock.
- Try using an alternate e-mail address (personal email address or setup a free email account, such as Hotmail or Yahoo). If you receive the emails at an alternate account, set up a rule to forward email messages sent by TimeIPS to your work account.
- FYI: Set up an internal mail server (mail server converts the @company.net from @[IP address]).
- If after making the changes, you still cannot receive e-mails, contact your ISP(Internet Service Provider).

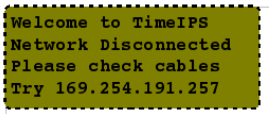
http://www.thedomainworks.com/smtp_settings.php

Troubleshooting: Unable to Access TimeIPS

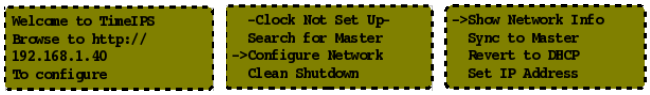
The TimeIPS server (master) system is generally located in your administrative offices. If you are unable to access the administrative sections of your TimeIPS system, the following instructions walk you through troubleshooting possible causes.

NOTE: If you are using TimeIPS ASP service, the server is located in the TimeIPS data-center. If you are unable to access it, plaese check your Internet connection and/or call TimeIPS Support for assistance.

- Make sure system is powered on. If not, follow the troubleshooting steps for TimeIPS will not power on.
- Check the physical network connection. If no network connection is detected, TimeIPS may display the following message:



  1. Unplug the network cable from the back of the TimeIPS system and then plug it back in.
  2. Unplug the network cable from the source (ex: router, hub, personal computer etc...) and plug back in to the source.
  3. Make sure you are using the correct cable for your configuration (crossover cable if connecting directly to a standalone computer, patch cable if connecting to network).
- Verify that the IP address you are trying to use has not been changed (the addressing method may be set to dynamic and the IP address has changed).
  1. Obtain the IP address by watching for the address during boot up, or after the boot process is completed, select "Configure Network" on the initial menu, then "Show Network Info" to view the current IP address.)



  2. If needed, reset to DHCP by selecting "Revert to DHCP" and then "Apply Settings" in the network menu.

TIP: If you do not have a keypad and/or small LCD display, attach a regular monitor and keyboard to the back of TimeIPS. You do not need to shutdown TimeIPS to install the keyboard and/or monitor.

TIP: Press Enter and Backspace at the same time to enter the System menu on a configured system. If using a full size keyboard, press the number pad's Enter key and Backspace at the same time. Use the number pad to navigate the menus (not the keyboard arrow keys.)

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  3. The LCD (or monitor) will display the version number, IP address, default gateway (GW) and the master server station (MST).
  4. Attempt to access TimeIPS through your web browser by entering your TimeIPS system's IP address in the address bar then pressing [ENTER] (ex: *http://192.168.1.40*).

- Verify that the IP address for your computer is compatible with the TimeIPS system.
  1. If you are using Windows, go to the **Start menu** and select the **Run** option. Type *cmd* (Win. XP) or *command* (pre- XP) and click on the **OK** button. At the terminal prompt, type: *ipconfig* then press [Enter].
  2. Under Ethernet adapter Local Area Connection verify that an IP address is listed and make note of it. Using a basic local area connection, the first three groups of numbers should be the same. (Ex. TimeIPS IP address 192.168.1.40 and your computer IP address 192.168.1.32)

Note: You do not want the fourth group of numbers to be the same as that would cause an IP address conflict.

---

  3. If the IP addresses are not compatible, temporarily change your computer's IP address to be compatible.
     - For Windows XP, go to the **Start** menu - **Control Panel** - **Network Connections** . Right Click on the **Local Area Connections** icon and select the **Properties** option. Highlight the **Internet Protocol(TCP/IP)** option and click on the **Properties** button. In the **General** tab select **Use the following IP address** radio button.

EXAMPLE: If TimeIPS's IP address is 169.254.123.45, change your computer's IP address to be a compatible number such as 169.254.123.95.

- Make sure there is not an IP address conflict.
  1. Ping the unit by opening a terminal (**Start menu** and select the **Run** option. Type *cmd* (Win. XP) or *command* (pre- XP) and click on the **OK** button.) and type: *ping* [IP address] and then press [Enter].

EXAMPLE: If TimeIPS has the IP address of 169.254.123.45, type *ping 169.254.123.45*

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  2. If you receive 4 replies, go to your web browser and the IP address for TimeIPS in the address bar and press [Enter]. If you receive a message that the server could not be found or a web page other than TimeIPS:
     a. Unplug the Ethernet cable from the back of the TimeIPS System. The Ethernet cable looks similar to a phone cord connection but is larger.
     b. Back in the terminal window, try to ping the IP address again. If you still receive 4 replies, you have another network device using the same IP address.
     c. Contact your network administrator and provide him/her with the IP address for TimeIPS.

- Make sure the firewall is not blocking your access to TimeIPS through the LAN connection.
  - In Windows, go to the **Start** menu - **Settings** option - **Control Panel** option. Double-click on the **Network Connections** icon. Right click on the **Local Area Connection** option and select **Properties**. Select the **Advanced** tab. Click on **Settings** under Windows Firewall and select **Turn off**.

NOTE: Once you are able to connect to TimeIPS, you may turn the firewall back on. If this again prevents you from accessing TimeIPS, contact your network administrator for assistance in configuring the firewall to allow access to TimeIPS.

- If you are using AOL's web browser, try connecting with a different web browser such as FireFox, Google Chrome, or Internet Explorer.

See Also:
TimeIPS Will Not Power On

Ports Used by TimeIPS

On-site TimeIPS servers communicate via TCP/IP to update software, keep time synchronized and provide diagnostic functions. Listed below are the remote IP addresses and ports used. Standard firewall/router configurations usually allow access to external sites without any special configuration. In locations with extremely tight network security, access to external IP's and ports may be limited to a special "whitelist" of known and authorized remote systems. If this is the case you you, then please allow access to each of the items on the list that follows. Different routers require different configuration techniques to allow these ports to be open. Please check with your router hardware provider for specific instructions on how to configure your specific router. Please note, the ports and IP addresses simply require that the port be open to allow TCP/IP traffic. TimeIPS servers DO NOT require port forwarding rules or any access from the outside to your internal network.

Firewall/Router Ports (TCP outgoing) that need to be open:

These ports need to be open to allow traffic out to the Internet.

- 80 and 443 (HTTPS) to 12.206.142.218 Required to authenticate for updates and off-site backups.
- 9443 (and alternatively 443 HTTPS) to 12.206.142.221 to enable interactive troubleshooting and assistance from TimeIPS Support.
- 9444 (and alternatevly 443 HTTPS) to 12.206.142.219 Required to download updates.
- 80 (HTTP) to timeips.com (65.254.250.145) Recommended for faster update speeds.
- 53 (DNS) Required for name resolution.
- 25 (SMTP) Required for email reports and messages. NOTE: Many ISPs block port 25. If this is the case for you, use your ISP's mail server, or configure email with a different port in TimeIPS and on your mail server and open the corresponding port on your firewall.4
- 123 (NTP) Recommended for time synchronization. Note: NTP requires UDP, not TCP. IF using ntp.timeips.com (the default) be sure this port is open to 12.206.142.218.
- 80 and 443 (and alternatively your asp-port number) to 12.206.142.205 for access to ASP systems.

Firewall/Router Ports (TCP incoming) that need to be forwarded:

If you have clocks or users outside your local network, these ports need to be "port-forwarded" in your router or firewall.

- 80 (Clock connectivity) Required for clock to master connectivity. Port forward required for WAN clocks.
- User specified port (Clock connectivity): Selected port can be set in System Administration->System Settings in the Network Configuration area in the Clock Access Port field.
- 80 (HTTP) If using port forwarding for remote access to administrative pages, forward incoming HTTP traffic to your TimeIPS server's LAN IP to port 80.
- 81 (TimeIPS Remote Clocking) Recommended for remote clocking from outside WAN.

NOTE: If using port forwarding for remote clocking access, forward incoming remote clocking requests to your master station's LAN IP to port 81.

Internal Information (visible to Administrators only):
- Note: Ping updates.timeips.com for current updates server IP address.
- Port 443 needs to be open for remote service.
- IP 75.48.191.221 used for remote service authentication
- Port 6035 used for QBI.

PRIOR TO 3/18/2013: These ports need to be open to allow traffic out to the Internet.

- 443 (HTTPS) to 75.48.191.220 and 75.48.191.221 Required to authenticate for updates and off-site backups.
- 443 (HTTPS) to 75.48.191.219 Required to download updates.
- 80 (HTTP) to 75.48.191.220 Required to authenticate IPSVOIP devices.
- 80 (HTTP) to timeips.com (65.254.250.105) Recommended for faster update speeds.
- 53 (DNS) Required for name resolution.
- 25 (SMTP) Required for email reports and messages. NOTE: Many ISPs block port 25. If this is the case for you, use your ISP's mail server, or configure email with a different port in TimeIPS and on your mail server and open the corresponding port on your firewall.
- 123 (NTP) Recommended for time synchronization. Note: NTP requires UDP, not TCP. IF using ntp.timeips.com (the default) be sure this port is open to 75.48.191.220.

Additional debugging information is found in our Bug Genie wiki.http://issues.timeips.com/wiki/Server%3ASupport%3AUpdateFailures

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New Clock does not communicate with server on network

- Check to make sure your TimeIPS Master Server's IP is configured correctly on the clock.
- Ensure that the TimeIPS Server and the Clock are on the same network and port 80 is open.
- If your clock is on a seperate network, make sure you have port fowarding configured to your TimeIPS Server and enter your external IP address on the clock instead of the Master Server's IP address.
- Ensure that there are no content filters or proxy devices between the clock network and the server network

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LCD Display Shows Two Rows of Bars

TimeIPS contains a hardware battery that continues to provide power to internal systems during shut down. If the TimeIPS system has an internal battery that is depleting or another situation occurs that disrupts the internal components, such as a power surge, the BIOS settings may need to be adjusted.

NOTE: Your system's model number is identified by the three numbers following the "S" in the system's serial number. The serial number can be found on the sticker on the back of your unit, on the back of your Installation and Users Guide, or in the page footer of your TimeIPS pages.

EXAMPLE: The serial number A05106S14201400 is a Model 142 system (since the model number begins with the number 1, refer to Model Number 1XX instructions below). The serial number A04153S25100070 is a Model 251 system (since the model number begins with number 2, refer to the Model 2XX instructions).

NOTE: Modification of BIOS settings can put your time clock into an inoperable state. For this reason, we recommend, contacting our support department prior to any changes.

Model Numbers: IPS120T and IPS125T

1. Unplug all devices and cables from the clock.
2. Plug in ONLY the power adapter and wait for up to 3 minutes for the display to initialize.
3. If you still see nothing but two rows of bars on the screen, please contact TimeIPS technical support for assistance.

Model Number 1XX, 230 and 260

(Other than IPS120T and IPS125T)

1. Attach a computer monitor to the Large Display connection on back of TimeIPS. Attach a regular keyboard to the purple controller port or USB port on back of TimeIPS.
2. Unplug your TimeIPS system from the power cord and wait 60 seconds.
3. Plug back in and immediately start tapping the delete key on the keyboard that you attached on back of TimeIPS.
4. Go to Features Setup.
5. Verify that Onboard Parallel Port is set to 378 (or 378h). Use the +/- keys to adjust it, if necessary.
6. Verify that Parallel Port Mode is set to EPP + ECP. Use the +/- keys to adjust it, if necessary.
7. Press ESC key.
8. Press F10 [Save and Exit].
9. ENTER [OK].

Model Number 2XX

1. Attach a computer monitor to the Large Display connection on back of TimeIPS. Attach a regular keyboard to the purple controller port or USB port on back of TimeIPS.
2. Unplug your TimeIPS system from the power cord and wait 60 seconds.
3. Plug back in and immediately start tapping the delete key on the keyboard that you attached on back of TimeIPS.
4. Go down 3 to Integrated Peripherals, press enter.
5. Go down 2 to Via SuperIO Device, press enter.
6. Go Down 2 to Onboard Parallel Port and using the +/- keys set to 378/IRQ 7
7. Go down one more to Onboard Parallel Mode and using the +/- keys set to ECP/EPP
8. After changes are made press F10 then Enter to save and exit changes
9. It is now safe to remove the Keyboard and Monitor

Internal Information (visible to Administrators only):

- **863 motherboard**
  1. **Delete** [CMOS Utility]
  2. Down 2x [Features Setup]
  3. **ENTER**
  4. Down 3x [Onboard Parallel Port]
  5. + [sets to 378 (or 378h)]
  6. Down [Parallel Port Mode]
  7. - [sets to EPP + ECP]
  8. **ESC** [Return to CMOS Utility]
  9. **F10** [Save and Exit]
  10. **ENTER** [OK]
- **789 motherboard**
  1. **Delete** [CMOS Utility]
  2. Right arrow [Features Setup]
  3. **ENTER**
  4. Down Arrow 3x [Onboard Parallel Port]
  5. + [sets to 378 (or 378h)]
  6. Down Arrow [Parallel Port Mode]
  7. - [sets to EPP + ECP]
  8. **ESC** [Return to CMOS Utility]
  9. **F10** [Save and Exit]
  10. **ENTER** [OK]
- **701 motherboard**
  1. **Delete** [CMOS Utility]
  2. Right arrow [Features Setup]
  3. **ENTER**
  4. Down Arrow 3x [Onboard Parallel Port]
  5. + [sets to 378 (or 378h)]
  6. Down Arrow [Parallel Port Mode]
  7. - [sets to EPP + ECP]
  8. **ESC** [Return to CMOS Utility]
  9. **F10** [Save and Exit]
  10. **ENTER** [OK]
- **Low Profile Systems**
  1. **Delete** [CMOS Utility]
  2. Down Arrow 3x[Integrated Peripherals]
  3. **ENTER**
  4. Down Arrow 2x [Via SuperIO Device]
  5. **ENTER**
  6. Down Arrow 2x[On board Parallel Mode]
  7. Using the +/- keys set to [378/IRQ7]
  8. Down Arrow [Onboard Parallel Mode]
  9. Using the +/- keys set to [ECP/EPP]
  10. **ESC** [Return to CMOS Utility]
  11. **F10** [Save and Exit]
  12. **ENTER** [OK]

LCD Display is Blank

- Adjust LCD contrast knob.
- Restart clock by typing
  + - + - ENTER
  on the keypad attached to TimeIPS.
- Check the LCD USB connection and plug it into a different USB port in the back of TimeIPS.
- Check to see that you are able to clock employees in or out. Turn up the speaker and clock in or out (you should still be able to hear "in" or "out").
- Contact TimeIPS Customer Relationship Department for further troubleshooting.

Internal Information (visible to Administrators only):

- If neither the display nor keypad is working, USB might be defective.

Extending a network with a Wireless Bridge

TimeIPS systems require a network connection. Sometimes, getting a network connection where you would like to place a clock is not practical. A wireless bridge allows a network to be extended to places where wires can't reach.

NOTE: A network bridge is an extension of network infrastructure. Network products offered by TimeIPS and information in this article are designed to help TimeIPS customers find a solution to their needs. TimeIPS technical support can assist with network and bridge configuration, but does not directly support networks. If you need assistance setting up your network, please seek the assistance of a local network consultant.

A wireless bridge provides a convenient way to extend your network to remote parts of a building, or even a completely separate building. By using common 802.11b/g standards, a wireless bridge can be installed for a reasonable price by anyone with basic network skills.

For a standard installation, you will need:

- 802.11b/g Access point (802.11n can also be used if needed.)
- Network bridge, such as the TimeIPS BRIDGE-WRT product.

For a building to building installation (or long range installation) you will also need:

- Outdoor directional antennas (e.g., Yagis) and mounts which can greatly improve the range and speed of the bridge.
- Lightening arrestors (optional).
- RF cable (for antennas, if needed)
- RF connectors (for antennas, if needed)

NOTE: For outdoor building-to-building connections, a direct line of sight between antennas and minimum clearance above any obstacles are required for best results.

Additional Information (Not supported or endorsed by TimeIPS)

- To learn more about antennas and accessories, refer to Cisco's Antenna Reference Guide.
- For long-range and outdoor installations, you may also want to consider "turnkey" bridging kits like the Proxim Tsunami QuickBridge.

Using Telephone Clocking on the same line as a Fax Machine.

You can connect the TimeIPS Telephone Clocking system on the same line as a Fax Machine. .

Connecting a VOIP box and a fax machine to the same telephone line.

You might choose to connect your VOIP box to a line that also has a fax machine. When you have a VOIP box on the same telephone line as a fax machine, the VOIP box answers all calls. The fax machine listens for fax calling CNG tones. If the fax hears them, the fax machine takes over the call and receives the fax. If it doesn't hear CNG tones, the fax machine lets the VOIP box continues to take the call.

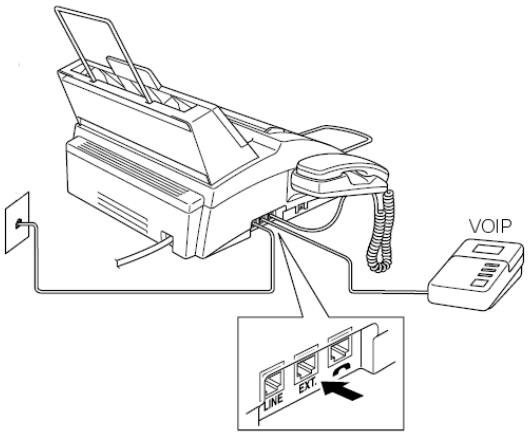
The VOIP box must answer within 2 rings. The fax machine cannot hear CNG tones (handshake) until the VOIP box has answered the call.

Connections

1. Plug the line from the wall jack into fax machine's jack labeled LINE.
2. Plug the line from your VOIP box into the fax machine's jack labeled EXT/TAD/PHONE.

   (NOTE: Make sure this is connected to the VOIP jack labeled line, and not jack labeled telephone.)
3. Set the fax machine's answer mode to TAD.

   (NOTE: See your fax machines owners manual for instructions on how to change its answer mode.)



See Also:
TimeIPS Telephone Clocking System

Troubleshooting - Network Disconnected

The message "Network disconnected. Please check cables" displays on the LCD.

If no connection to another network device is detected, TimeIPS will display:

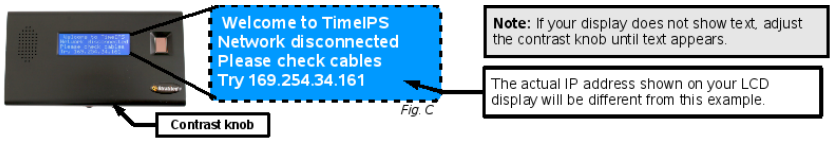


Fig. C

- Check the physical network connection.
  1. Unplug network cable from back of the TimeIPS system network port slot then plug it back in. You should hear it snap in place.
  2. Unplug network cable from the source (ex: router, hub, personal computer etc...) and plug back in to the source. You should hear it snap in place.
- Make sure that you are using correct cable for your configuration (crossover cable if connecting directly to a standalone computer, patch cable if connecting to network)

For TimeIPS Master Server:

If you're trying to connect a master server, record the IP address shown on the LCD display (Fig. C).

Although the message on the LCD display (Fig. C) has not changed, you will proceed with the instructions in the Getting Started Guide to begin configuring the TimeIPS master server.

For Clock:

Unplug the power cord from the clock, wait 1 minute and then plug it back in. This will allow the clock to search for a master server. If a master server is located, the TimeIPS LCD will display:

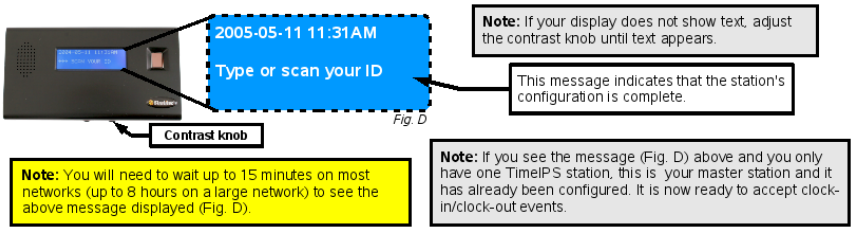


Fig. D

If the clock is still unsuccessful in locating the master server, please call our Customer Relations Department at 877.846.3256 for further assistance.

NOTE: After a clock has connected to a master server at least once, you will see the following display if the master server subsequently becomes unavailable.

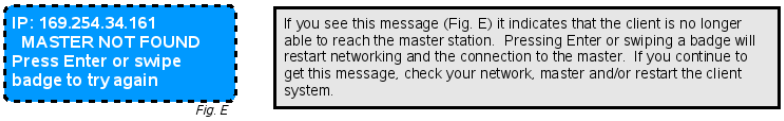
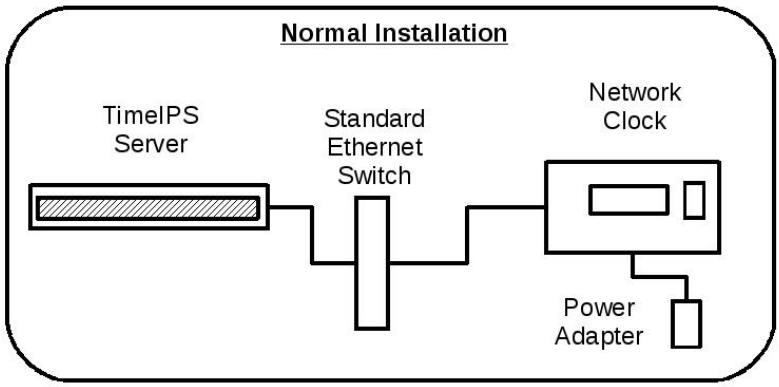


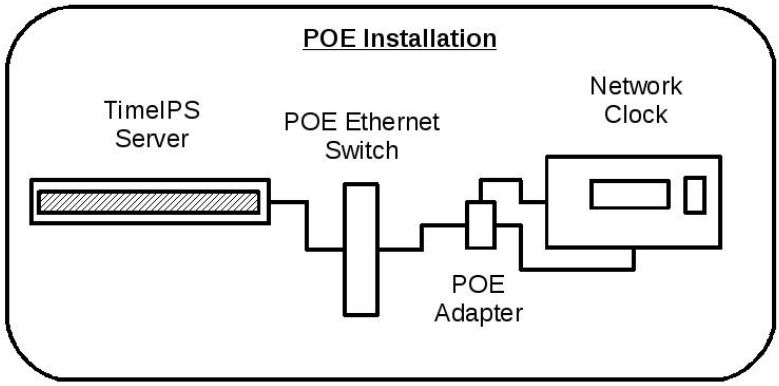
Fig. E

* Actual LCD screen color may vary

Power Over Ethernet with TimeIPS

TimeIPS Network Clocks can be powered directly with a AC power adapter, or with the TimeIPS Power Over Ethernet adapter. If a POE Ethernet switch is not available, a "power injector" can be used to put POE power on the network wire going to the clock. TimeIPS uses and requires 802.3af compliant POE.





Ethernet Extenders for TimeIPS

TimeIPS Network Clocks connect using standard Ethernet cables. Ethernet standards allow cables with lengths up to 100m (328 feet). In most cases this is more than enough length, but there are situations in very large buildings, or between buildings, where this is insufficient.

To connect TimeIPS at a remote location, there are several options to consider:

- If there's space, place an Ethernet switch in the middle of the run (or at approximately 300 foot intervals for longer runs). If power is not available in the middle, POE can supply power for one switch from each direction.
- Use a VDSL Ethernet Extender. These are easy to install and allow connection from LAN -> VDSL -> LAN where the VDSL segment is up to 1000m (approx 3280 feet) and uses standard twisted pairs, such as network cable or phone lines. One example of a kit for this is the "StarTech 110VDSLEXT 10/100 VDSL Ethernet Extender Kit over Single Pair Wire – 1km"
- Use Fiber. Ethernet switches with fiber capacity and fiber connections are available for lengths up to a mile or more.
- Place a separate Internet connection. If there's no way to get a cable between buildings, consider Internet service at the second building to facilitate connection.
- Use wireless cell-network bridge. In remote or mobile locations, devices exist that allow TimeIPS clocks to bridge to the Internet over the cell-phone network.

If you have additional questions, please contact TimeIPS technical support for assistance.

Wide Area Network (WAN)

This guide will assist you in setting up a Wide Area Network (WAN) that allows your TimeIPS Clocks to communicate with your TimeIPS Master Server via the Internet.

You will need the following:

- Continuous (always-on) Internet access at each location, such as Cable or DSL modem access.
- A router at each location. The router allows you to connect multiple computers together, forming a LAN (Local Area Network). Your TimeIPS system and any computers you wish will connected to the router.
- A static public facing IP address for the router at the location of your TimeIPS master system. The static IP address will be provided by your ISP (Internet Service Provider). This will allow you to connect to the router from anywhere you have Internet access.

Overview of the steps involved:

1. Obtain the needed Internet Services for each of your locations, including a static public facing IP address for the location of your TimeIPS Master Server. Your Master Server needs a public facing static IP address so the Clocks will always know where to send their clocking data; the IP address will not change.
2. Install the Router and Configure the Internal Network at the location of your Master Server.
3. Install and Configure the TimeIPS Master Server.
4. Configure the router at the Master Server's location to forward information it receives from the Internet to the LAN IP address of the Master Server.
5. Install and Configure the TimeIPS Clocks. You will configure the Clocks to send clocking information to the public facing static IP address of the router at the Master Server's location.

An Introduction to IP Addressing

If you are unfamiliar with or are new to networking concepts, below are some basics about IP Addressing:

"What is a static vs a dynamic (DHCP) IP address?"
A static IP address is assigned to a computer or network device and never changes. A "dynamic" or DHCP (Dynamic Host Configuration Protocol) address is obtained automatically from a router or server and may change without affecting your computer's performance. Computers, by default, are set to DHCP. Statically assigned IP addresses have been specifically assigned from a network administrator and are stored in a table to prevent two devices from receiving the same address.

"What is an internal (LAN) vs a public (Internet or WAN) address?"
Multiple computers that are connected together to share resources (such as Internet access, printers, and files) are generally on the same "internal" network or LAN (Local Area Network). You cannot access these resources from the Internet or your home computer without additional networking devices and/or configuration. A public network refers to the Internet. The Internet is a series of computers and servers that host information and can be accessed with any Internet connection provided by an Internet Service Provider (ISP).

1. Obtaining the needed Internet Services.

- To use TimeIPS at multiple locations over the Internet, you must provide each location with a continuous connection to the Internet.
- The Master Server's location must have a **Static IP** address provided by your ISP (Internet Service Provider).
- Clock locations will work with either Dynamic (DHCP) or Static IP addresses.

NOTE: Upgrading to a Static IP Address may require an additional fee each month and/or may require your Internet service to be upgraded to business level.

NOTE: If you do not want to upgrade to a Static IP Address you may be able to use your Dynamic address by setting up a DynDNS service.

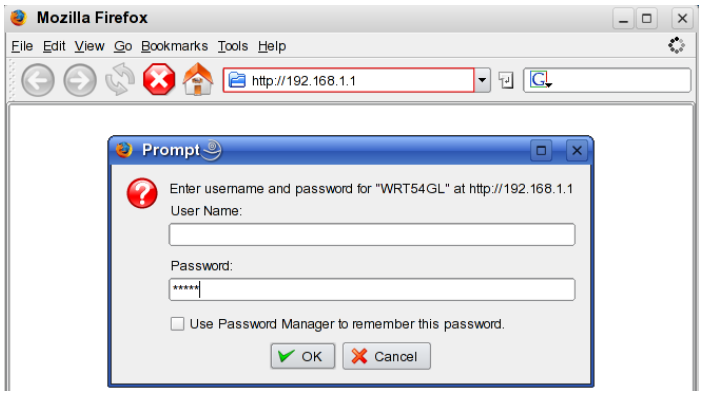
2. Configure the TimeIPS Master Server.

The TimeIPS server will need an internal static IP address, but this address you will assign on your local network (this will not have anything to do with your ISP or Internet connection). For assistance setting up your Master Server please refer to this article: **Getting Started**

3. Master's Location: Configure router for port forwarding.

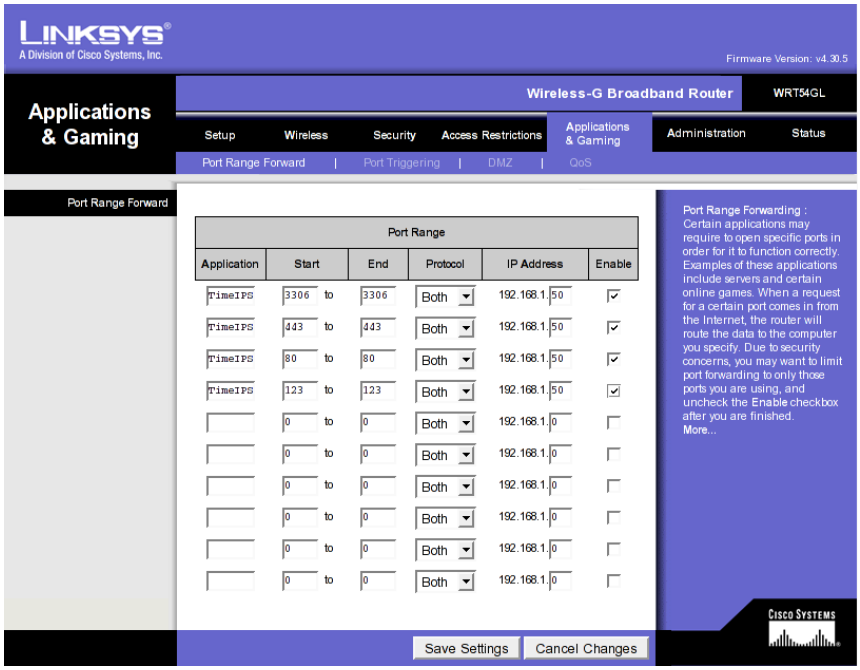
We will use a common router (Linksys WRT54GL) as an example. Routers from other manufactures are similar, but their configuration option and menu items will be different. The web site portforward.com is a helpful resource that provides instructions on how to port forward many other routers. If you can not find the instructions on portforward.com please contact your router manufacturer for support and assistance.

1. Follow the wiring instructions that came with the router. Connect an Ethernet cable from your Cable/DSL modem to the port marked **Internet** or **WAN** on the router. Connect another Ethernet cable from your PC/Laptop to one of the four **LAN** ports on the router (labeled 1-4).
2. Turn on your PC/Laptop and open a web browser.



3. Type in HTTP://192.168.1.1 in the address bar. You should be prompted for a **User Name:** and **Password:**.

NOTE: If this is the first time to configure your Linksys WRT54GL the default username is blank and the password is Admin.

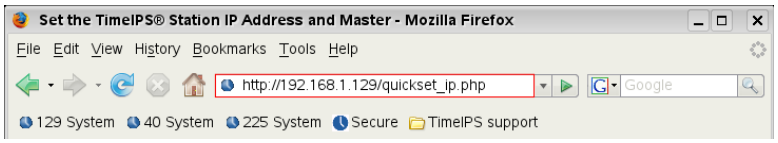


4. Click on **Applications & Gaming**.
5. Type the name of the rule under **Application** (example TimeIPS).
6. Enter the number of the port you wish to forward under both the **Start** and the **End**. For the Clocks to connect with the Server you must forward **port 3306**. To find out what other ports are used by TimeIPS please refer to this article: **Ports Used by TimeISP**.
7. Choose TCP from the drop down under **Protocol**.
8. Enter your Master Server's IP address under **IP Address**.
9. Put a check mark in the **Enable** box.
10. Click on **Save Settings** button.

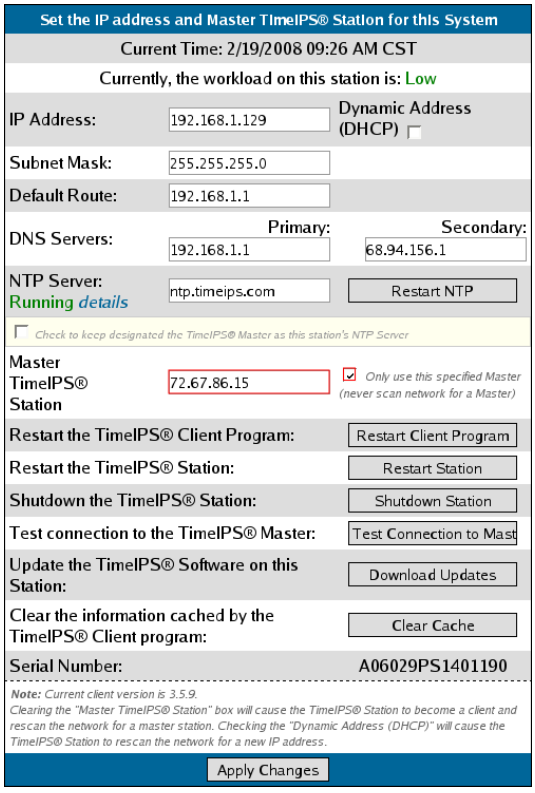
4. Clock's Location: Configure the TimeIPS Clock.

1. Connect all peripherals to the Clock. Connect the Clock to the router and power the system on.

2. Write down the IP address displayed on the Clock's LCD.



3. Launch a web browser using a computer that is connected to the same router as the Clock.
4. Type the Clock's IP in the **address** field followed by /quickset_ip.php (example: http://192.168.1.129/quickset_ip.php).



5. Enter the IP address of the Master Server in the **Master TimeIPS Station** field.
6. Put a check mark in the box marked **Only use this specified Master**.
7. Click on the **Apply Changes** button.
8. After a few seconds the Clock's lcd will display **Restarting client please wait**.
9. It will then change to **Searching for TimeIPS Master**
10. Once the Master is found it will display **Type or scan your ID**.

5. Congratulations!! You have now finished setting up your WAN. If you have more then one Clock connecting via the Internet repeat step 4 at the other Clock locations.

See Also:
DynDNS
Ports Used by TimeIPS

DynDNS

This article describes how to use the DynDNS service to work around a non static (dynamic) IP address.

Depending on your specific implementation you may have TimeIPS client stations that reside outside of your local area network. In this configuration the ideal solution is to obtain a static (fixed) public facing IP address from your Internet Service Provider (ISP). Some business level accounts may include a static address. Please check with your provider for details. If your ISP does not offer an option for a static address at your location you can typically work around non fixed IP addressing (dynamic) through the use of a third party service called **DynDNS**.

Note: At the time of the creation of this document DynDNS offered it's basic services free of charge to individuals. Please review and respect any and all terms of service outlined on the DynDNS website which can be found at http://www.dyndns.com.

What is DynDNS and how does it work?

The name DynDNS stands for Dynamic Domain Name System (DNS). You can think of a domain name as being a bridge between a name and a number; for example when you type a domain name like: ***http://www.timeips.com*** into a web browser DNS translates this domain name into an IP address like **65.254.250.105**. If your ISP does not provide a static address to your modem you can use DynDNS' services to maintain a domain name that is always pointed to your local network. Dynamic DNS works by running a piece of software on your network that updates the DNS servers at DynDNS of

changes that occur to your public facing IP address.

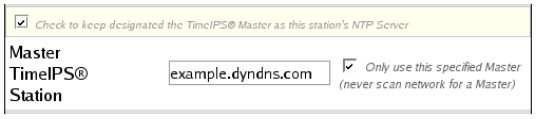
Here is an example:

You have registered the domain name of ***your_company_name.dyndns.com*** and it is currently being pointed to your public IP address which is **66.55.26.122**. Overnight your ISP renews the IP address leased to your DSL/Cable modem changing it to **66.55.26.156**. Upon seeing the change on your network the DynDNS Updater software contacts out to the DynDNS servers telling them that ***your_company_name.dyndns.com*** is now located at **66.55.26.156**; thus requests made to your domain name are always able to reach your local network regardless of changes made to your public IP address.

The steps to setting up DynDNS are as follows:

1. Register an account on the **DynDNS** website located at ***http://www.dyndns.com***
2. Decide where you would like to run the **DynDNS Updater** software. There are two ways of running the updater, most modern routers provide native support to DynDNS services. Check the documentation for your particular router model for details. Direct support via a router is the easiest and most effective method. However, if your router does not provide this feature you can also run the DynDNS Updater software directly on a computer at your location. DynDNS provides updater software for most major platforms including **Linux**, **Windows**, and **Mac OS**. It is important to note that you will want to run the Updater on a computer that is always available on your network (i.e. a server or workstation that does not get turned off at night).
3. Provide the domain name you have registered with DynDNS to the updater running at your location.

Once properly configured DynDNS will keep your domain name pointing to your local network. When setting up your remote clocks you should provide the domain name you have registered in the field labeled **TimeIPS Master** on the clock configuration page of the remote clock. You will also need to set up **Port Forwarding** rules to ensure clock events get routed properly to your TimeIPS Master Server.



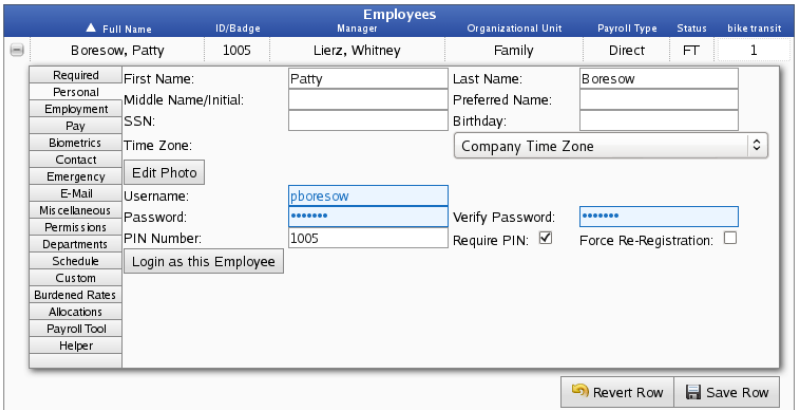
See Also:
Wide Area Network (WAN)
Ports Used by TimeIPS
Adjusting Client's Network Information

Entering/Resetting a Username/Password

Managers with Employee Personal Info permissions can reset an employee's forgotton password. System-wide password resets can be obtained by contacting the TimeIPS Technical Support department.

Using the left pane Main Menu » Administration, click on: Employees » Employees.

1. Click on the **Employee's Name** to expand the employee's record. The employee's **Personal** tab will display.



2. Enter a new **Username** and/or **Password**. Enter the password again in the **Verify Password** field.
3. Click on the **Save Row** button to save the change.

NOTE: If you need all passwords in the system reset, fax a written and signed request for password reset on company letterhead to TimeIPS technical support at (316) 636-2337. Please Include your registration number and contact information.

NOTE: A Technical Support contract is required for a system-wide password reset. If your Technical Support contract has expired, contact the TimeIPS sales department at 877.846.3256 to renew your contract.

Internal Information (visible to Administrators only):

- Have customer enter http://IP/admin/systemrecovery.php
- TimeIPS CRM will need to go to http://192.168.1.208:81/admin/cs_passwordrecovery.php
- TimeIPS CRM to enter customer's service number and generate new service number.
- Have customer enter new service number to get new password for their username. Have them spell out their username and password and make note for yourself.
- Confirm they can login and assist them by going to employee management-employees and selecting their record and help them change the password to whatever they want.
- Confirm that they can logout and login with their new username and password.
- they can also fax 316.264.1600 and we will get an email.

Web Browser Compatibility

Mozilla Firefox 12+ or Google Chrome 24+ are the recommended web browsers for current versions of TimeIPS on all platforms. All functions in TimeIPS are designed and tested for optimal performance with Firefox and Chrome.

TimeIPS has selected Firefox and Chrome as the recommended browsers for the following reasons:

- True cross-platform compatibility: Easy to install and use on Windows, Mac and Linux
- Excellent track record for security and stability
- Compliance with web standards
- Solid Javascript performance

If you are unable to use Firefox or Chrome for some reason, or are using an older version of TimeIPS, you may be able to use another browser. Compatibility varies by browser, browser version, TimeIPS version and operating system as summarized below:

TimeIPS 1.10.x, 1.11.x, 2.0.x

Web Browser	Compatibility with 1.10.x, 1.11.x, 2.0.x
Google Chrome	Full Compatibility
Firefox 12+	Full Compatibility
Firefox 1.x - 11.x	Untested
Internet Explorer 9	Good Compatibility
Internet Explorer 8	Some parts not compatible
Internet Explorer 5, 6, 7	Not Compatible
IE on Mac OS 9	Untested
Safari 3+	Untested
Opera 10+	Untested

TimeIPS 1.8.x and 1.9.x

Web Browser	Compatibility with 1.9.x
Google Chrome	Full Compatibility
Firefox 12+	Full Compatibility
Firefox 4.x - 11.x	Untested
Firefox 1.x, 2.x, 3.x	Untested
Internet Explorer 9	Good Compatibility
Internet Explorer 8	Some parts not compatible
Internet Explorer 5, 6, 7	Not Compatible
IE on Mac OS 9	Untested
Safari 3+	Untested
Opera 10+	Untested

TimeIPS 1.6.x

Web Browser	Compatibility with 1.6.x
Google Chrome	Not Compatible
Firefox 5+	Good Compatibility
Firefox 2.x, 3.x, 4.x	Full Compatibility
Firefox 1.x	Untested
Internet Explorer 8 and 9	Not Compatible
Internet Explorer 8 in Compatibility Mode	Good Compatibility
Internet Explorer 7 on XP	Good Compatibility
Internet Explorer 7 on Vista	Untested
Internet Explorer 6	Not Supported
Internet Explorer 5	Not Supported
IE on Mac OS 9	Untested
Safari 3+	Untested
Opera 10+	Untested

TimeIPS 1.4.x / 1.5.x

Web Browser	Compatibility with 1.4.x and 1.5.x
Google Chrome	Untested
Firefox 3.x and 4.x	Untested
Firefox 2.x	Full compatibility
Firefox 1.x	Good compatibility
Internet Explorer 8 and 9 (All modes)	Untested
Internet Explorer 7 (All OS)	Untested
Internet Explorer 6	Good compatibility
Internet Explorer 5	Not Supported
IE on Mac OS 9	See Note 2
Safari 3+	Untested
Opera 10+	Untested

TimeIPS 1.3.x and Older

Web Browser	Compatibility with 1.3.x and older
Google Chrome	Untested
Firefox 3.x and 4.x	Untested

Firefox 2.x	Full compatibility
Firefox 1.x	Good compatibility
Internet Explorer 8 and 9 (All modes)	Untested
Internet Explorer 7 (All OS)	Untested
Internet Explorer 6	Good compatibility
Internet Explorer 5	Not Supported
IE on Mac OS 9	See Note 2
Safari 3+	Untested
Opera 10+	Untested

"Full Compatibility" indicates that all pages/functions work and everything appears as intended.
"Good Compatibility" indicates that almost everything generally works. However, some pages may not appear as intended and/or minor functions may not work.
"Not Compatible" indicates that some important pages or functions in TimeIPS will not function with the browser.
"Untested" indicates that the browser has not been extensively tested by TimeIPS for compatibility. On recent TimeIPS releases, very old browsers are not tested. On older TimeIPS releases, the browser may not have been available at the time the software was written. Untested browsers are likely to have compatibility issues.

Note 1: IE 8 Compatibility Mode

Internet Explorer Version 8 does not work correctly with many web applications. Fortunately, Internet Explorer 8 includes a compatibility mode which resolves some issues. To activate compatibility mode in Internet Explorer 8 do the following:

- Right-click on the top of the page and select to display **Menu**.
- On the Menu bar select **Tools**.
- Select **Compatibility View Settings**.
- The IP address of the clock should show under **Add this website**.
- Click on **Add**.

Note 2: Mac OS 9

IE for Mac OS 9 has some compatibility problems including the inability to open calendar pop-ups.

- Calendar icons do not open the pop up calendar when clicked on. (in Time Report, selecting birth date, etc.)
- If using Internet Explorer for Mac OS 9 download an alternate browser (i.e.: Mozilla Firefox)

If you continue to have issues please contact TimeIPS Tech Support at support@timeips.com.

Data is cut off when printing through web browser.

Some web browsers have the functionality to shrink the web page to a regular page width when printing. If your web browser does not have this option, try downloading the Mozilla Firefox web browser at: www.mozilla.com

Once the browser is downloaded and installed, open it and go to the File menu - Page Setup option. Check the "Shrink to Fit Page Width" checkbox.

TimeIPS System will not power on.

Your TimeIPS system is an electronic device that requires power to operate. If your TimeIPS system is not getting sufficient power, employees may not be able to clock in and out and administrators may not be able to view employee's time from the administrative pages.

- Power Cycle the TimeIPS System.
  1. Unplug power cord from the back of the TimeIPS system and wait a full 60 seconds.
  2. Test the outlet by plugging another electronic device into it.
  3. Plug the power cord to the back of TimeIPS system and to the successfully tested wall outlet. The fans and harddrive should begin spinning. The boot process generally takes 2-3 minutes.

- If the system powers on (lights turn on and fans/HD are heard spinning), but nothing displays on the LCD:
  - Check the CMOS settings.

- If the system does not power on or shuts down shortly after restarting:
  - Your TimeIPS system may be experiencing hardware issues or require further trouble-shooting. Contact the TimeIPS Technical Support department for further trouble-shooting and service options.

Internal Information (visible to Administrators only):

A. Repeat the above steps with the customer.
B. If you feel the customer is qualified to do self-service:
   1. Test the auto on adapter.
      a. Unplug the power and remove the case.
      b. Remove auto-on adapter.
      c. Using anything metal(tip of screwdriver, paper clip, etc.), touch the orange prongs. If the system starts up fine, then the auto-on adapter is bad.
   2. Make sure the memory is seated.
      - Press firmly but carefully on the memory stick.
C. Explain warranty service.
   - *This appears to be a hardware failure. Under the depot warranty included with your system, you can send the system into our service center, we will do complete diagnostic testing, repair the system, and ship the system back to you.*
   - If they are a candidate for self-service (they properly performed the steps above), *we can send out the service parts that we think have failed, a power supply and an auto on adapter. However, we do recommend that you send it in to the service center.*

See Also:
Unable to Access TimeIPS
Checking the CMOS Settings

Trouble-shooting: Relay does not activate

1. TimeIPS clocks load relay rules every few minutes when they check-in with the server. If you have just entered realy rules (or just changed a rule) you must either wait for a check-in or force an update at the clock.
2. In the event the clock loses connection to the server, the clock will continue to activate the relay rules.
3. Ensure that the relay device is properly connected to the TimeIPS system. Refer to the Relay examples articles for diagrams.

4. If the device is connected to channel 1, unplug the relay control from the TimeIPS unit then plug it back in. Channel 1 should close the circuit very briefly, activating the device.
5. If the relay rules were working and stopped, adjust the clock's network information to set it to a static IP address if there is a relay connected. This will ensure that dynamic lease does not expire prior to the cache updating.
6. Use keypad service codes or the on-screen menu to test the relays.
7. Contact TimeIPS support for keypad service codes you can use to close and open the circuit for additional testing purposes.

Hand Punch Biometric Validation

TimeIPS can validate employee identification using biometric hand punch authentication. Employees clock in and out of TimeIPS and are asked to present their hand for validation. You can deny the clock event or send an email warning if the validation fails.

A special adapter cable is required to connect a Hand Punch unit to TimeIPS. This cable is included with Hand Punch units purchased from TimeIPS. If you already have Hand Punch units and purchased cables alone, you will need to configure your Hand Punch units to communicate with TimeIPS.

Reset

- First reset your reader. This is normally done by removing power to the Hand Punch reader, pressing and holding the reset button on the back (on older units, by setting DIP switches 4 and 5 to the "ON" position), and re-connecting power.
- If prompted on startup, reset all to defaults
- Normally the reset to defaults will allow communication to work at this point.
- If not, follow the configuration steps below:

Configuration

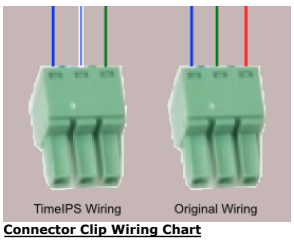
- Enter command mode on the Hand Punch unit by pressing Clear and Enter on the keypad at the same time.
- Enter 2 for the password and press Enter. This will enter the configuration menu.
- Press the "* No" key until you reach the "Set Address" prompt. Then press the "# Yes" key.
- The address should be set to "1"
- Press the "* No" key until you reach the "Set Serial" prompt. Then press the "# Yes" Key.
- Press the "* No" key until you reach the "Set RS-232" prompt. Then press the "# Yes" Key.
- The screen should be set to "9600 baud"

You may wish to change passwords on the Hand Punch unit after configuration to prevent tampering

Upon initial setup of a new hand punch unit to an existing clock it is required to probe for the new device. This can be done directly at the clock by pressing "enter" to get into the system menu and logging in using the badge number of a system administrator. Use the arrow keys on the keypad to navigate to "Use Biometrics" and press enter. On the next screen select "Auto" and press enter once more to detect the hand punch reader.

Handpunch wiring:

TimeIPS handpunch cables must be wired correctly to the small green adapter that plugs into the back of the handpunch unit. If the hand punch reader's wiring has come loose, or if the hand scanner was delivered unwired, the following diagram depicts the correct wiring. If the handpunch cable has Blue, Blue/White and Green wires, use the diagram on the left. If the handpunch cable has Blue, Green and Red wires, use the diagram on the right. Note that in the photos below, the screws used to tighten the wires are facing **down**.



Connector Clip Wiring Chart

Basic troubleshooting

- Power-cycle the TimeIPS clock and Handpunch unit
- Double-check the cable connecting TimeIPS to the Handpunch. Look for loose wires or connectors.
- Clean the platen with a damp cloth using a mild soap. Wipe from the back to the front. Be sure to clean the back right corner.
- Calibrate the optical system. Press Clear and then Enter at the same time and hold. The screen should say "PASSWORD." Then press 1 and press Enter. This will be the Service Menu, prompting to calibrate. Press # then # again to complete the calibration.

Internal Information (visible to Administrators only):

* HandPunch Calibration values

R and **C** values represent the HandPunch sensor image alignment. Acceptable values should be between +2 and -2, with zero being ideal. If your HandPunch shows values outside of this range then HandPunch has a problem with hand recognition and may need to be repaired.

E value represents HandPunch sensor image quality. Acceptable value is between 100 and 120, 100 being ideal. If **E** value is above 120, your HandPunch may produce unreliable hand images when user registers. The HandPunch can be cleaned to improve its functionality.

Mounting and Installation

TimeIPS offers a number of mounting and installation guides and templates. Please visit the TimeIPS download section on this web site.

TimeIPS Routine Maintenance

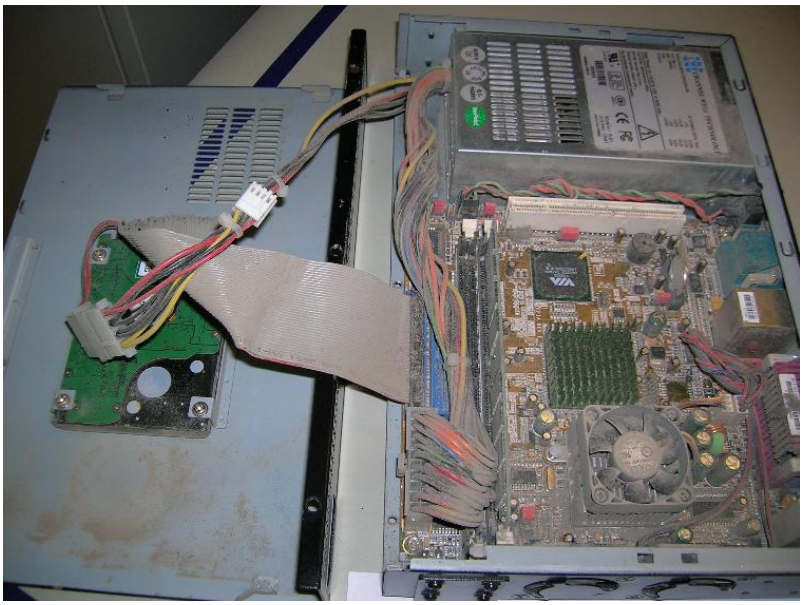
For cleaning and maintenance for the outside of your TimeIPS biometric clock use a soft, dry cloth. Do NOT use cleaning products on the unit.

Internal Clock Maintenance

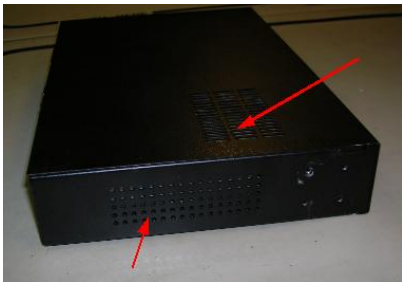
Periodic maintenance is crucial to prolonging the operation of your TimeIPS system. Simply removing the dust from your system can make a significant impact on its longevity. Dust and dirt will clog fans and heatsinks causing the components in your TimeIPS system to operate at a higher temperature than normal. This additional heat will eventually cause your system to fail. We recommend performing this maintenance procedure once every six months. If your TimeIPS system is in a highly dusty or dirty environment we recommend cleaning your system every couple of months.

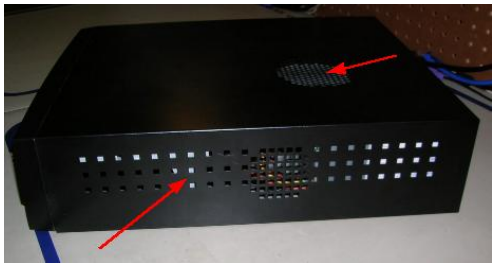
Cleaning your TimeIPS system with compressed air:

Shutdown your TimeIPS system to perform this maintenance procedure. Always shutdown the system properly by going to Administration -> System Administration -> System Settings -> Shutdown Server. If your system is several years old or in a very dirty environment you may want to take it outside before cleaning it. When disconnecting cables be sure to take a moment and note how all of the peripherals are connected so that they can be re-connected properly. The following are a few examples of systems which have not had sufficient maintenance.



To clean your TImeIPS system direct the compressed air through any and all of the vents in your TimeIPS system which are NOT directly over a fan. For examples of these vents refer to the following images. It is very important NOT to direct the compressed air into any of the fans in your TimeIPS system.

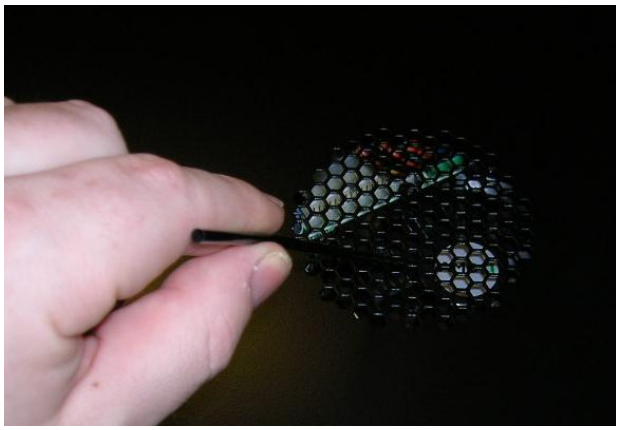


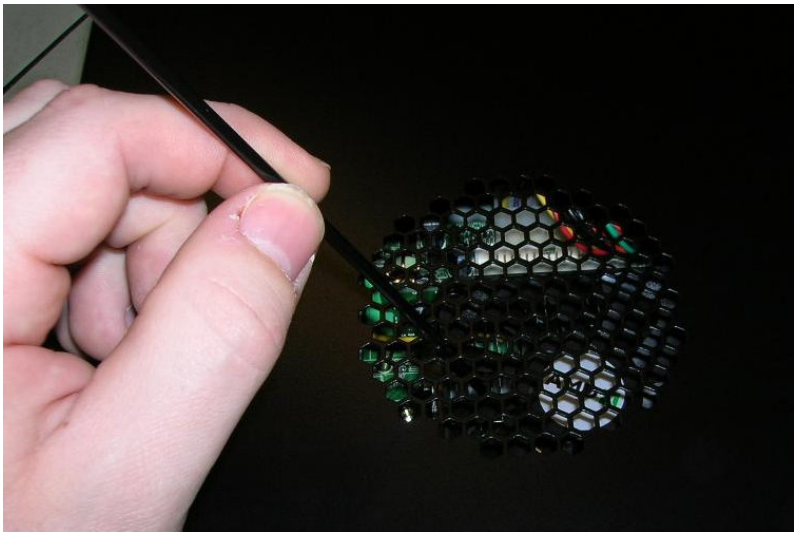


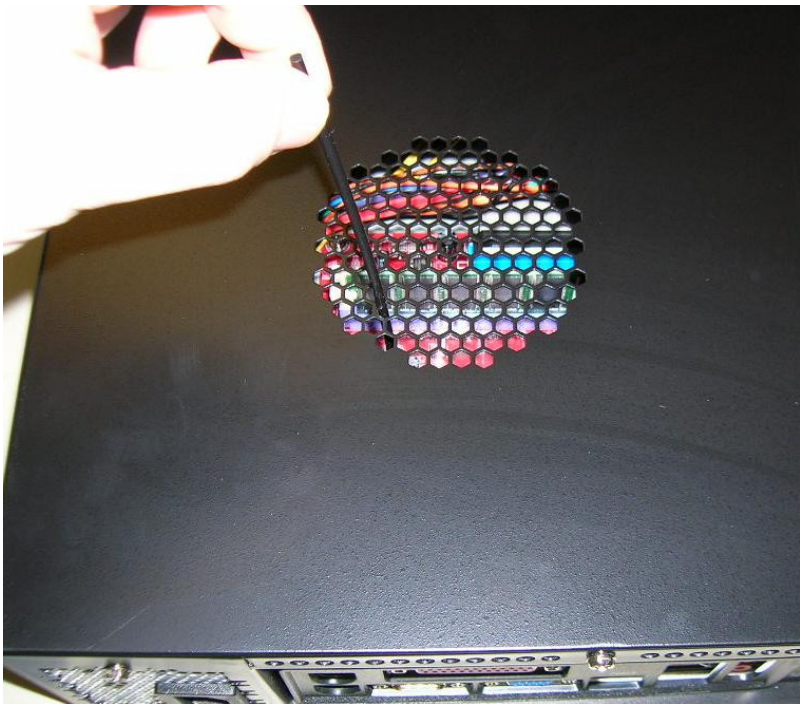
NOTE: Some models of TImeIPS systems have a fan directly below the vent on the top of the system in the above image. If your TimeIPS system has a fan in this location DO NOT direct compressed air into this vent at this time.

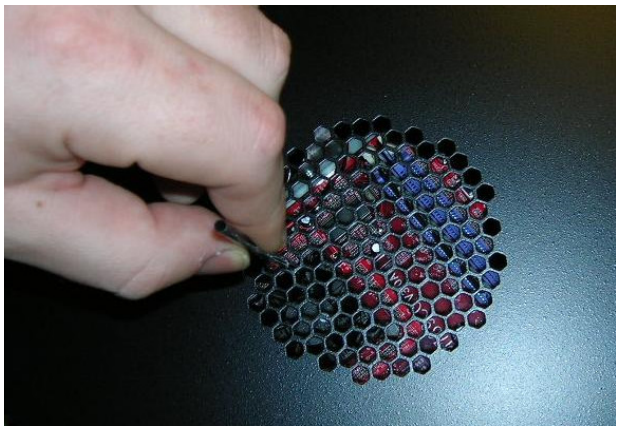
If you direct the compressed air into any of the fans in your system the air will cause the fan blades to spin at a very high rate of speed. **This high rate of speed is beyond what the fans are designed for and will cause damage to their bearing(s).** In order to clean the components behind these fans it is necessary to prevent the fan blades from spinning. A very simple method to keep the fan blades in place is to use a coffee stir-straw such as this.

Insert one end of the stir-straw into the fan housing far enough that the fan blades can not spin past it. For some examples of this refer to the following images.









Wherever there are multiple fans (as in the above image) each fan will have to be held in place independently for cleaning.

With the fan held in place, use the compressed air to clean the dust off of the fan itself and the components behind it. Repeat this procedure for each accessible fan in your TimeIPS system.

This maintenance procedure is a very simple and effective means of keeping your TimeIPS system running clean and cool. Performing regular maintenance can help reduce the chances of incurring additional expenses relating to warranty service in the future.

Data Recovery

In the event of severe hard drive corruption, without the use of backups, a company may wish to rely on a third party data recovery service to try and retrieve any valuable inforamtion from the damaged drive.

Please note that TimeIPS does not endorse these companies. This information is simply provided here as a convenience for our customers.

Drive Savers

Contact Information

- Phone: 800.440.1904
- Website: http://drivesaversdatarecovery.com

Basic Information

Drive Savers evaluates situations on a case-by-case basis, depending on turn around time, and the complexity of the recovery. However, the size of the drive does not really affect the price. Whether they are recovering 1 GB or 1 TB, the price is the same.

Drive Savers does cover shipping if it is being shipped within the continental United States.

Their recovery facility does include an ISO 5 clean room.

Service Levels

Levels	Turn Around	Low Price Point	High Price Point	Misc.
Economy	5 - 7 days	$700	$2700	No data, no charge
Standard	1 - 2 days	$900	$3900	No data, no charge
Priority	Around the clock	$1800	$8900	

Data Recovery Systems

Contact Information

- Phone: 877.304.7189
- Website: http://datarecovery.net

Basic Information

The estimated repair time for a standard HDD is roughly 2 - 12 hours. For an SSD, the estimate is 8 - 24 hours.

The cost of return shipping is covered if it is being shipped to the continental United States.

Data Recovery System's facility does include an ISO 5 clean room.

If no data can be recovered, there is no charge.

Service Levels

Levels	Diagnostic Fee	Diagnostic Period	Hourly Rate	Misc.
Standard	Free	24 - 48 hours	$150	Avg. 5 day turn around
Expedited	$270	4 hours	$270	
Emergency	$270	4 hours	$270	$900 per engineer per day

Salvage Data Recovery

Contact Information

- Phone: 800.972.3282
- Website: http://www.salvagedata.com

Basic Information

Salvage Data Recovery's facility does include an ISO 5 clean room.

If no data can be recovered, there is no charge.

Service Levels

Levels	Flat Fee	Diagnostic Fee	Diagnostic Period	Low Price Point	High Price Point	Turn Around	Misc
Standard	None	Free	24 - 48 hours	$500	$2500	5 - 8 days	Available normal business hours
Eco Salvage	None	Free	24 - 48 hours	$200	$700	10 - 15 days	Available normal business hours
Critical	$500	?	2 - 6 hours	?	?		24 / 7 / 365

Virtual Machines

TimeIPS offers virtual machine images for environments where this is preferred to a physical server. A number of tips and resources for running TimeIPS in a virtual environment are available. Please contact TimeIPS technical support for additional information.

Successful Installations

Customers have reported sucecssful VM installations in the following host environments

- VMWare
- MS Hyper V
- VirtualBox
- QEMU - KVM
- Parrallels

If you have chosen to use VMWARE as your virtual host enviroment then please note that you will want to use our VMDK file image. If you received an IMG file you can convert it using the following steps or you can contact support for the VMDK image.

Converting IMG and VMDK Files

Customers who run TimeIPS using our standard virtual machine setup use VMDK or IMG files. Customers using VMWare require a VMDK file. Files can be converted between the two formats using qemu-tools which comes installed on many linux distributions like openSUSE.

To convert an IMG file to VMDK format issue the following command:

```
qemu-img convert timeips.img -O vmdk timeips.vmdk
```

VMDK files can be converted back to a raw IMG file with this command:

```
qemu-img convert timeips.vmdk -O raw timeips.img
```

If you use VMWARE and have VMDK File

The installation may differ depending on the version of VMWARE you have. The TimeIPS guest will require the VMWARE host to be in DHCP. If you need TimeIPS to have a static IP you will want to lock it by MAC address. You will need to copy the VMDK file to your data store. Then do a custom install. You will want to choose use existing disk and then point it at the VMDK file that is in your data store.

Once installed you will be prompted for a user name and password. Ignore this. Find the IP that your VM Host assigned via DHCP to the new TimeIPS guest and use a web browser to browse to the IP adress. This will bring you to the set up page.

If you use Hyper V

You will first want to convert your VMDK file to a raw disk img and then into a VHD file.

To convert your VMDK file to a raw disk impage you can use Qemu-img. This can be downloaded from this link Qemu . You will need to download this and unzip it to a folder on your computer. Next open a command prompt. Change directory to the folder you unziped Qemu to. Use this command: qemu-img convert -f VMDK -O Raw c:\name of folder with the vmdk file\timeips.vmdk c:\name of folder with the vmdk file\timeips.img

To convert your IMG file to a VHD file you can use VhdTool.exe. If you do not already have it installed you can get it at this link VhdTool. You will want to download this to the same directory as your timeips.img. Here is the command to convert the file to VHD format. vhdtool.exe /convert timeips.img This will convert the file. Once it is done you will then need to rename the file to timeips.vhd by right clicking on the timeips.img.

Copy the timeips.vhd file to the folder you store your virtual machine images. In hyper V you will create a new machine. During this process you will want to choose connect virtual hard disk and point it at your timeips.vhd file. Choose install OS later. Before starting your new Machine you will want to set it up to use a legacy network adaptor. On the machine settings, choose add new hardware and then choose legacy network adaptor. Set the new adaptor to the correct network to use. Now launch your new virtual machine.

Internal Information (visible to Administrators only):

Customers notes on how he got it to work on Parallels.

I converted the format to .hdd format that Parallels would recognize. Once I had the disk format converted, I configured a new Parallels VM using the converted .hdd file as the disk image. Parallels recognized it as an earlier Parallels hdd format (ver 3) but up converted it to 7. The only concern I had initially was how it would handle the NIC, whereas you had specified one of two types to use. This is not an option within parallels configuration, but it seemed to work just fine.

To convert the disk formats, I found instructions in a few different forums via google.
I used QEMU (http://wiki.qemu.org) command line utility on OSX 10.7.4 to handle the conversion. I had to load a few prerequisites to get it to work; most notably Macports (www.macports.org). Once I could execute the port command, I was able to use qemu with the following syntax:
qemu-img convert TimeIPS.vmdk TimeIPS.hdd
this was from Bill Kirwin bkirwin@botellolumber.com

Manager's Guide to TimeIPS

Welcome to TimeIPS! TimeIPS helps manage employees and increase workforce productivity by keeping you informed of your workforce status.

As a manager, TimeIPS provides a number of tools that can help you manage and track your employees. In addition, there are a number of management responsibilities you'll have over your employees.

*(For aid in navigating this guide, there are multiple "hyperlinks" that will take you to the corresponding article in the TimeIPS knowledge base. Simply click on the subject link in **BLUE** (color may vary depending on your browser) anywhere in this document to get more information on that particular subject.)*

Manager's Tools

There are several status reports that a TimeIPS provides to Managers to assist them in keeping track of their employees.

Viewing Your Employees

- Employee Directory = View Currently Clocked In Employees
  - Employee Status View
  - Global Status Messages

Manager's Responsibilities

Depending on the modules and options installed on your TimeIPS system, there may be a number of management responsibilities you have over your employees.

Editing and correcting missed punches

- Time Edits

Approving Time Sheets

- Time Sheet Approval

Approving Employee Benefits

- Employee Benefits Request Approval - with **IPSAPP®**

Employee's Guide to TimeIPS

Employee's Guide to TimeIPS

The Employee's Guide to TimeIPS is a document designed to help your employees understand and use your new TimeIPS system. The typical process to using the guide are as follows:

1. Visit the download area and get the current version of the Employee's Guide to TimeIPS template.
2. Review the document
3. Customize the first page to address your employees and to include your company information
4. Remove the sections that don't apply to your installation
5. Proof the resulting document
6. Print or email the document to your employees

API Overview

The TimeIPS API modules provide a programming API to allow integration with external systems.

Please contact your TimeIPS sales representative for more information.

Internal Information (visible to Administrators only):

TimeIPS provides the following API modules:

- IPSIAPI *Allows automated import and updates of Employees and related entities such as Departments, Jobs, Sites, etc..*
- IPSCAPI: *Allows automated clocking and status checks such as Clock-In, Clock-Out , Change Job, etc.*
- IPSSAPI *Allows automated server functions such as getting employee lists, getting worked time, requesting/approving benefits, etc .*
- IPSDBRO *Allows read-only access directly to the database tables used by TimeIPS.*
- *IPSPAPI Allows automated generation of payroll-aware reports with access to overtime, shift differentials, etc.*

To use any of the API's, an employee with permission to perform the required action is required. Create a full-permission employee in TimeIPS and activate the "API Script User" option under:

Administration -> Clocking -> Remote Clocking.
This user and password will be what you use to authenticate the API transactions you send.

While the API can be used to read and write data to the TimeIPS, it may not provide the fastest or most flexible way to read data. In these cases the TimeIPS DBRO module can be used which allows direct database access. With DBRO, you can write and run your own queries as needed.

Implementing a server using TimeIPS IPSCAPI

It is possible to implement a customized software server for use with TimeIPS Network Clocks. Please contact your sales representative for more information.

Internal Information (visible to Administrators only):

TO BE FILLED IN And overview of the TimeIPS clock<->server communication, specifically capi.php, sapi.php, and iapi.php. These 3 scripts don't need to be php files, or even seperate scripts, as long as a request against "capi.php?data..." succedes. CAPI must respond to... SAPI must respond to... IAPI must respond to...

IPSCAPI Module

The IPSCAPI module is a programming API that allows automated clocking and status checks using custom scripts.

Please contact your TimeIPS sales representative for more information.

Internal Information (visible to Administrators only):

IPSCAPI Module *The IPSCAPI module is a programming API that allows automated clocking and status checks using custom scripts.* The TimeIPS Clock API Module provides the following features:

- Programming API to allow clocking and status checks using custom scripts
- Supports Employees, Jobs, ID/Badge Mappings and more

Programming Interface:

- Response format: XML, HTTP form-encoded, plain text, or HTML
- Communication interface uses standard HTTP requests (get and/or post)

NOTE: Requires TimeIPS version 1.5.4 or later.

How to use IPSCAPI:

To use IPSCAPI, you will write scripts which will produce URLs that contain parameters that tell TimeIPS what action to take. The URL must contain a username and password for authentication. The username specified for authentication must be an employee marked as a "Script User" in the Remote Clocking interface.

The IPSCAPI module allows you to request TimeIPS to perform the following functions:

Replace the "timeips" text below with your TimeIPS master station IP address.

Available Functions:

- checkClock
  - Required: none
  - Optional: format
  - Returns: Current server time
  - Side effects: none
  - Example:
    input: `http://timeips/capi.php/checkClock?format=xml`
    output: `<time unix='1168987689' month='01' day='16' year='2013' hour='16' minute='49' second='14' />`
- getStatus
  - Required: credentials
  - Optional: format, target
  - Returns: Employee's current status
  - Side effects: none
  - Example: Employee is currently "out" so this action will clock him "in."
    input: `http://timeips/capi.php/getStatus?username=admin&password=timeips&format=xml`
    output: `<status name="Alpha, Alan" status="IN" worked="29556" remaining="114444" />`
  - Output in xml format may contain an additional section detailing the clock events for the day
    Timestamp of the start of the day
    Timestamp of the end of the day
    Timestamps of all clocks events for the day
    Timestamp of the last clockevent in the day

```
<status name="Smith, Joe" status="IN" time="1290557619" job="174" scheduled="40" remaining="144000" systime="1290557620" command="clockIn">
<todaysTimes>1290492000</todaysTimes>
<todaysTimes>1290578400</todaysTimes>
<todaysTimes><times in="1290557619" out="1290557620" />
</todaysTimes>
<todaysTimes>1290557620</todaysTimes>
</status>
```

- doClock
  - Required: credentials
  - Optional: format, target, job, note, custom*
  - Returns: New status, or errors
  - Side effects: Clocks user in/out/changes jobs
  - Example: Employee is currently "out" so this action will clock him "in."
    input: `http://timeips/capi.php/doClock?username=admin&password=timeips&format=xml`
    output: `<status name="Alpha, Alan" status="IN" worked="29556" remaining="114444" />`
- clockIn
  - Required: credentials
  - Optional: format, target, job, note, custom*
  - Returns: New status, or errors
  - Side effects: Clocks user in
  - Example:
    input: `http://timeips/capi.php/clockIn?username=admin&password=timeips&format=xml&note=Late`
    output: `<status name="Alpha, Alan" status="IN" worked="29556" remaining="114444" />`
- clockOut
  - Required: credentials

- Optional: format, target, note, custom*
- Returns: New status, or errors
- Side effects: Clocks user out
- Example:
  input: `http://timeips/capi.php/clockOut?username=admin&password=timeips&format=xml`
  output:
```
<status name="Alpha, Alan" status="OUT" worked="29556" remaining="114444" />
```

- changeJob
  - Required: credentials
  - Optional: format, target, job, note, custom*
  - Returns: New status, or errors
  - Side effects: User changes jobs
  - Example:
    input: `http://timeips/capi.php/changeJob?username=admin&password=timeips&format=xml&job=140`
    output:
```
<status name="Alpha, Alan" status="IN" job="140" worked="29556" remaining="114444" />
```
- setUsername
  - Required: credentials, newUsername
  - Optional: format, target
  - Returns: Success or failure
  - Side effects: Changes a user's username
  - Example: If the user "admin" wished to change the username for employee "asmith" to "adams"
    input: `http://timeips/capi.php/setUsername?username=admin&password=timeips&targetUsername=asmith&newUsername=adams&format=xml`
    output:
```
<setUsername success="1" />
```
- setPassword
  - Required: credentials, newPassword
  - Optional: format, target
  - Returns: Success or failure
  - Side effects: Changes a user's login password
  - Example: If the user "admin" wished to change the password for employee "asmith"
    input: `http://timeips/capi.php/setPassword?username=admin&password=timeips&targetUsername=asmith&newPassword=apple23&format=xml`
    output:
```
<setPassword success="1" />
```
- getNonce
  - Required: credentials
  - Optional: format, target
  - Returns: 32-character nonce (one-use) password
  - Side effects: Sets a nonce password for the user for a one-time login
  - Example: An automated system (with username "master") wishes to create a one-use password for employee "asmith"
    input: `http://timeips/capi.php/getNonce?username=master&password=any1knows&targetUsername=asmith&format=xml`
    output:
```
<nonce value="68b329da9893e34099c7d8ad5cb9c940" />
```
  - Typically used to provide a single-signon. i.e. When an employee completes their initial login, a script will access a URL as shown above. The result will then be used to build a URL provided to the employee to click to access TimeIPS. For example:
```
http://timeips/index.php?username=asmithr&nonce=68b329da9893e34099c7d8ad5cb9c940
If the employee is in a different division, add division=<division code>.  For example:
http://timeips/index.php?username=asmithr&nonce=68b329da9893e34099c7d8ad5cb9c940&division=1234
```
- getHistory
  - Required: credentials, rangeType {events|minutes|hours|days}, rangeLength
  - Optional: format, target
  - Returns: All time events and benefit/holiday usage for the specified range
  - Side effects: none
  - Example: Employee asmith wishes to see all of his clock events from the past 48 hours
    in: `http://timeips/capi.php/getHistory?username=asmith&password=apple23&rangeType=hours&rangeLength=48&format=xml`
    out:
```
<history>
 <clock job="102">
  <in month="01" day="15" year="2013" hour="08" minute="03" second="15" />
  <out month="01" day="15" year="2013" hour="12" minute="00" second="03" />
 </clock>
 <clock job="103">
  <in month="01" day="15" year="2013" hour="13" minute="22" second="41" note="Back from lunch late" />
  <out month="01" day="15" year="2013" hour="17" minute="02" second="21" />
 </clock>
 <clock>
  <in month="01" day="16" year="2013" hour="07" minute="59" second="08" />
  <out month="01" day="16" year="2013" hour="12" minute="04" second="34" />
 </clock>
</history>
```
- getJobs
  - Required: none
  - Optional: format
  - Returns: All jobs available for clocking
  - Side effects: none
  - Example:
    input: `http://timeips/capi.php/getJobs?format=xml`
    output:
```
<jobs>
 <job name="Inspection" shortName="Insp." code="102" />
 <job name="Clerical" shortName="Clerical" code="103" />
</jobs>
```
- getCustomFields*
  - Required: none
  - Optional: format, function {doClock|clockIn|clockOut|changeJob}, target (only used for doClock)
  - Returns: List of custom field names and IDs
  - Side effects: none

Common Parameters:

- format:
  - If omitted, API calls will return to machine-readable HTTP form data.
  - `text` returns unformatted human-readable text.
  - `html` returns HTML-formatted human-readable text.
  - `xml` returns machine-readable XML
- credentials:
  - This will uniquely identify and authenticate a user with scripting privileges who is performing the action.
  - The required fields are "`username`" and "`password`".
- target:
  - May be specified by using a variable name as follows:
    - A username (use targetName or targetUsername)
    - A badge number (use targetHID)
    - A user database ID (use targetUsersID)
    - * A user Alternate Employee number (use targetEmpNum)
  - This will uniquely identify (but not authenticate) a user with "Script Target" privileges who will receive the action.
  - If omitted, defaults to the user whose credentials are provided.

Parameters may be supplied in any order.

*Functions and parameters marked with a * are not be available until 1.8 or later.*

Scripting

To automate api requests, use your own programs, or write scripts with open-source tools such as "curl" or "wget".

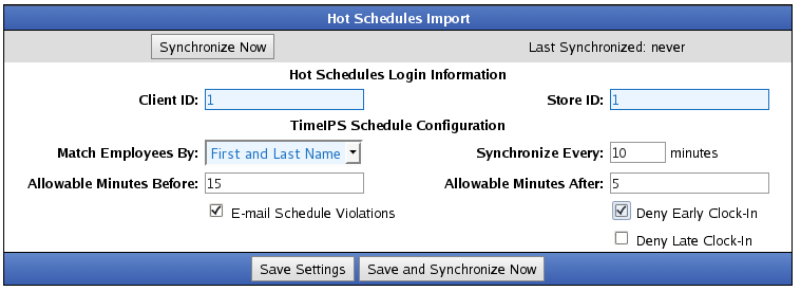
IPSHOTSCH - Hot Schedules Integration

The Hot Schedules Integration Module (IPSHOTSCH) synchronizes employee's start times into their TimeIPS employee schedule for use with email deviation alerts and MyTimeIPS - My Schedule view.

Using the left pane Main Menu » Administration, click on: Schedules » Import/Export

Click on the

icon



TIP: The Last Synchronization displays at the top of the page.

Initial Configuration

1. Enter your Hot Schedules **Client ID** and **Store ID** provided with your Hot Schedules Company Account and enter the following TimeIPS Schedule Configuration settings:
   - Select the employee data to match TimeIPS and Hot Schedules employee records in the **Match Employees By**. You may match them by *First and Last Name*, TimeIPS ID/*Badge Number*, TimeIPS *Alternate ID* number.
   - Enter the number of minutes between each synchronization in the **Synchronize Every** field. TimeIPS will automatically pull employee's scheduled start times for the week at this defined interval.
   - Enter the the total minutes allowed before and after the scheduled clock in times in the **Allowable Minutes Before** and **Allowable Minutes After** fields. The employee's start time and these values will populate the employee's TimeIPS schedule.
   - Checkmark **E-Mail Schedule Violations** to generate an e-mail notification when the employee clocks in outside of the specified range of minutes around their scheduled start time or if they do not clock in when they are scheduled.
   - Checkmark **Deny Early Clock-In** to prevent the employee from clocking in to TimeIPS the specified number of minutes before the scheduled start time.
2. Click on the **Save Settings** button.
3. Click on the **Synchronize Now** button to perform an immediate synchronization.

NOTE: Schedules will synchronize if ALL employees match. If one match is not found, correct the problem and synchronize again.

Additional Information

- Schedules will pull for schedules for today plus 6 days.
- Click on the **Synchronize Now** button to synchronize schedules immediately. TimeIPS will continue to automatically synchronize schedules at the specified intervals.
- Clicking on **Save Settings** applies all HotSchedules settings (Allowable Minutes Before and After, E-mail Schedule Violations, and Allowable Minutes After) globally and immediately.
- The **Hot Schedules Import** page can be accessed directly by browsing to the IP address and "/admin/HotSchedules.php."
- The Hot Schedules Integration module IPSHOTSCH was released in TimeIPS v1.5.8; Mantis #1110.

IPSIAPI Module

The IPSIAPI module is a programming API that allows automated import and updates using custom scripts.

Please contact your TimeIPS sales representative for more information.

Internal Information (visible to Administrators only):

IPSIAPI Module *The IPSIAPI module is a programming API that allows automated import and updates using custom scripts.* The TimeIPS Import/Export API Module provides the following features:

- Programming API to allow automated import and update using custom scripts
- Supports Employees, Jobs, ID/Badge Mappings and more

Programming Interface:

- Response format: XML
- Communication interface uses standard HTTP requests (get and/or post)

NOTE: Requires TimeIPS version 1.5.5 or later. Some options only supported in later versions of TimeIPS. For complete functionality, please update to the lastest version of TimeIPS that is available.

How to use IPSIAPI:

To use IPSIAPI, you will write scripts which will produce URLs that contain parameters that tell TimeIPS what action to take. The URL must contain a username and password for authentication. The username specified for authentication must be an employee marked as a "Script User" in the Remote Clocking interface.

The IPSIAPI module allows you to request TimeIPS to perform the following functions:

Replace the text between the brackets below with your TimeIPS master station IP address. Do not include the brackets in your script.

FUNCTION	BASE URL
Employees	http://*[Your TimeIPS master station IP address]*/iapi.php/emp
Organizatinoal Units	
Departments	http://*[Your TimeIPS master station IP address]*/iapi.php/dept
Sites	http://*[Your TimeIPS master station IP address]*/iapi.php/site
Site Coverage	http://*[Your TimeIPS master station IP address]*/iapi.php/site-coverage
Site Jobs	http://*[Your TimeIPS master station IP address]*/iapi.php/site-jobs
Site Clocks	http://*[Your TimeIPS master station IP address]*/iapi.php/site-clocks
Site IP Addresses	
Site Employees	http://*[Your TimeIPS master station IP address]*/iapi.php/site-employees
Schedule	
Payroll Types	http://*[Your TimeIPS master station IP address]*/iapi.php/payroll-types
ID/Badge Mapping	http://*[Your TimeIPS master station IP address]*/iapi.php/mapping
Batch Time	
Benefits	http://*[Your TimeIPS master station IP address]*/iapi.php/benefits
Jobs	http://*[Your TimeIPS master station IP address]*/iapi.php/jobs
Job Coverage	http://*[Your TimeIPS master station IP address]*/iapi.php/job-coverage
Job Employees	http://*[Your TimeIPS master station IP address]*/iapi.php/job-users
Job Employee Rates	http://*[Your TimeIPS master station IP address]*/iapi.php/job-user-rates
Job Tracking Fields	
Categories	http://*[Your TimeIPS master station IP address]*/iapi.php/categories
Customers	http://*[Your TimeIPS master station IP address]*/iapi.php/customers
Work Orders	http://*[Your TimeIPS master station IP address]*/iapi.php/workorders
Piecework	
Piecework Event Entries	
Pay Rates	
Membership	
Custom Data	http://*[Your TimeIPS master station IP address]*/iapi.php/custom-data
Divisions	http://*[Your TimeIPS master station IP address]*/iapi.php/divisions
Clocks	http://*[Your TimeIPS master station IP address]*/iapi.php/clocks

Examples:

In the following examples, an employee with the username "admin" and password "timeips" is set as a script user in Remote Clocking.

EXAMPLE 1: Log in as "admin" with password of "timeips" to change Alan Alpha's password to "LogMeIn"

`http://[Your TimeIPS Master Station IP Address]/iapi.php/emp?username=admin&password=timeips&firstname=Alan&lastname=Alpha&newPassword=LogMeIn`

EXAMPLE 2: Log in as "admin" with password "timeips" to map "123" to "10001" for the badge field

`http://[Your TimeIPS Master Station IP Address]/iapi.php/mapping?username=admin&password=timeips&original=123&replacement=10001&field=badge`

EXAMPLE 3: Log in as "admin" with password "timeips" to add new employee, John Smith, with badge number 789

`http://[Your TimeIPS Master Station IP Address]/iapi.php/emp?username=admin&password=timeips&firstname=John&lastname=Smith&badgenumber=789`

EXAMPLE 4: Log in as "admin" with password "timeips" to add new job, NewJob, with code 1234

`http://[Your TimeIPS Master Station IP Address]/iapi.php/jobs?username=admin&password=timeips&jobname=NewJob&smalldisplayname=NewJob&jobcode=1234`

EXAMPLE 5: Log in as "admin" with password "timeips" to add new job, NewJob, with code 1234 in division named 'my_div'

`http://[Your TimeIPS Master Station IP Address]/iapi.php/jobs?username=admin&password=timeips&jobname=NewJob&smalldisplayname=NewJob&jobcode=1234&fordivisionname=my_div`

EXAMPLE 6: Log in as "admin" with password "timeips" to set the Vacation level to 100 hours effective 10/1/2009 for employee name admin s admin.

`http://[Your TimeIPS Master Station IP Address]/iapi.php/benefits?username=admin&password=timeips&employee=admin, admin s&vacationAvailable=100&vacationEffective=10/01/2009`

EXAMPLE 7: Log in as "admin" with password "timeips" to set the employee Joe S Admin to belong to site Warehouse.

```
http:///[Your TimeIPS Master Station IP Address]/iapi.php/site-employees?username=admin&password=timeips&sitename=warehouse&employeename=admin, joe s&active=1
```

NOTE: All functions require the "username" and "password" parameters.

The documentation for the remaining parameters is the same as the documentation for the CSV import files. For convenience, you can remove spaces from the header names and you don't have to have the same capitalization. For example, the CSV import documentation for employees has a "First Name" column. This would be presented to IPSIAPI with a parameter like &firstname=Alan (or &FirstName=Alan, or &First%20Name=Alan -- %20 means "space").

There are two exceptions: the "username" and "password" columns for the employee import. Since these names are already used for specifying your credentials, these columns are replaced with "newUsername" and "newPassword" (again, capitalization isn't important for IPSIAPI).

Division Notes:
When performing api calls for a division, use one of the following:

1. fordivisionname=<name of the division>
2. fordivisioncode=<code of the division>
3. fordivisionid=<internal databaseID of the division>
4. fordivision=<any of the above> In this case, TimeIPS will try to match by name, then by code, then by divisionID.

Scripting

To automate api requests, use your own programs, or write scripts with open-source tools such as "curl" or "wget"

Special Characters

Please note that special characters will need to be url encoded to work as expected. For example:

Character	URL Encoded Version
<space>	%20
#	%23
<	%3C
>	%3E
&	%26
'	%27
"	%22
#	%23

Other special characters may also need to be encoded. If the API call results in an error, or data does not process correctly, check for special characters and URL encode them.

IPSPAPI Module

The IPSPAPI module is a programming API that allows customers to programmatically interact with the TimeIPS payroll subsystem to produce reports that include overtime, shift differentials, etc.

Documentation and examples on the use of IPSPAPI are available. Please contact your TimeIPS sales representative for more information.

Internal Information (visible to Administrators only):

IPSPAPI
Payroll API Module

Note: Requires TimeIPS version 2.0.14 or later

The TimeIPS Payroll API Module allows customers to programmatically interact with the TimeIPS payroll subsystem to calculate overtime, shift differentials, etc.

- Supports running any pre-configured reports, in all modes, such as CSV, PDF, and XLS.
- Supports XML report output mode to facilitate integration with other software.

Response format:

- Direct access to report results
- Communication interface uses standard HTTP requests (GET and/or POST)

Request Format
Making a Request

Requests should be made using HTTP GET or POST requests to "papi.php" at the address of your TimeIPS master station. For example, if your TimeIPS system has the IP address 10.0.0.101 then all requests will go through this base URI:

```
http://10.0.0.101/papi.php
```

Specifying the Method

After "papi.php" a request must specify which method to run. The list of supported methods is given below in "Supported Methods". Methods are specified in this format:

```
http://10.0.0.101/papi.php/method
```

Authentication

All requests must contain the parameters "username" and "password" to authenticate the TimeIPS user that is making the request. This is the same username and password that an employee would use to log in to TimeIPS. **Note:** This employee must also be configured as a Script User under Clocking >> Remote Clocking. An example request URI will look like this:

```
http://10.0.0.101/papi.php/method?username=admin&password=timeips
```

Specifying a Division

By default PAPI will assume that any requests should be processed within the division of the authenticated employee. Alternatively requests can be scoped to a particular division by adding one of the following extra parameters:

- fordivisionname: Division is identified by name such as "Acme Company"
- fordivisioncode: Division is identified by it's configured payroll code such as 2000
- fordivisionid: Division is identified by it's TimeIPS generated unique ID such as 4
- fordivision: PAPI will attempt to identify a division first by name, then code, then ID as specified in the previous three parameters.

For any of these methods a value of "all" will cause PAPI to use all divisions visible to the authenticated user.

An example request URI is

```
http://10.0.0.101/papi.php/method?username=admin&password=timeips
&fordivisionname=Acme+Company
```

Specifying the Response Format

All PAPI methods can respond with error information for exceptional conditions as well as the response specific to that method. PAPI can respond in a variety of formats including JSON and XML. Specify

the desired format by adding "format=json" or "format=xml" to the request. For example

```
http://10.0.0.101/papi.php/method?username=admin&password=timeips
&fordivisionname=Acme+Company&format=json
```

This response format will be honored whenever possible and the response will include a HTTP header specifying the appropriate Content-type. One exception to this formatting rule is the method "customReport" which will respond with a format designated by the chosen custom report's format.

Supported Methods

getCustomReportPresets

This method will respond with a list of the custom report presets configured in the TimeIPS system. The response will include the name and presetID of each configured report. The presetID is used by the method "customReport".

This method requires no additional parameters.

Example Request

```
GET /papi.php/getCustomReportPresets?username=root&password=timeips
    &format=json
```

Example Responses

JSON Format

```
HTTP/1.1 200 OK
Content-Type: application/json

{
  "presets": {
    "1":"Global: Hours Worked Detail",
    "2":"Acme Company: Acme Payroll Summary"
  }
}
```

XML Format

```
HTTP/1.1 200 OK
Content-Type: text/xml

<presets
    1="Global: Hours Worked Detail"
    2="Acme Company: Acme Payroll Summary"
    />
```

customReport

This method will run a Custom Report and respond with its contents. It requires several parameters in addition to the base parameters described above.

- presetID: The report to run. This can be found by running "getCustomReportPresets". This presetID must be accessible within the requested division.
- employeeGroup: The employee targets for the report. This can be a comma separated list of TimeIPS usersIDs or the number 0 to indicate "all visible employees". Visibility is determined by the permissions of the authenitcated user and the selected division.
- start: The starting date/time for the report. This is needs to be a string format such as "2013-01-01 12:00:00 AM", URL encoded.
- end: The ending date/time for the report. Follows the same format as the start date/time.
- useEmployeeTZ: An optional parameter which controls how the start and ending date/time parameters are interpreted. If omitted or supplied with a "falsey" value like 0 or "" (blank) then PAPI will use the company's time zone. If a generally true value like "1" is supplied then the start/end times will be interpreted in the time zone of each employee separately.

Example Request

```
GET /papi.php/customReport?username=root&password=timeips
    &format=xml&fordivision=all
    &presetID=1&employeeGroup=1,2
    &start=2013-01-01+12:00:00+AM&end=2014-01-01+12:00:00+AM
    &useEmployeeTZ=1
```

Example Responses

Using a presetID configured to respond with xml you will get a response like the following. Newlines and indention were added for ease of understanding. Comments were also added to highlight important points.

```
HTTP/1.1 200 OK
Content-Type: text/xml
<?xml version="1.0" encoding="utf-8"?>
<report>
  <!-- Only included if using header (preamble) -->
  <header>
    <row>
      <!-- Preamble column named "Foo" -->
      <foo>Data for foo</foo>
      <!-- Preamble column named "Bar" -->
      <bar>Data for bar</bar>
      <!-- Unnamed preamble column -->
      <column>Data for unnamed column</column>
    </row>
  </header>
  <body>
    <row>
      <!-- Column named "Employee Name" -->
      <employee_name>Boris</employee_name>
      <!-- Column named "Hours" -->
      <hours>30</hours>
      <!-- Column named "Code" with no data -->
      <code />
      <!-- Unnamed column -->
      <column>ST</column>
    </row>
    <row>
      <!-- Column named "Employee Name" -->
      <employee_name>Natasha</employee_name>
      <!-- Column named "Hours" -->
      <hours>40</hours>
      <!-- Column named "Code" -->
      <code>303</code>
      <!-- Unnamed column -->
      <column>ST</column>
    </row>
  </body>
  <!-- Only included if using footer -->
  <footer>
    <row>
      <!-- Footer column named baz -->
      <baz>Data for baz</baz>
      <!-- Unnamed footer column -->
      <column>Data for unnamed column</column>
    </row>
  </footer>
```

```
</report>
```

Using a presetID configured to respond with CSV you will get a response like the following.

```
HTTP/1.1 200 OK
Content-Type: text/csv
"Employee Name","Hours","Code",""
"Boris","30","","ST"
"Natasha","40","303","ST"
```

Note on Request Timeouts

The TimeIPS Payroll Engine works hard to ensure accuracy and as such can take significant time to process payroll especially for large time frames or for large groups of employees. Additionally other blocking payroll processes can prevent a custom report from executing quickly. Given that, requests for this method should have an extended timeout period. PAPI will consider a reporting to be taking too long to generate after an hour of waiting.

IPSSAPI Module

The IPSSAPI module is a programming API that allows automated server functions using custom scripts.

Please contact your TimeIPS sales representative for more information.

Internal Information (visible to Administrators only):
IPSSAPI Module *The IPSSAPI module is a programming API that allows automated server functions using custom scripts.* The TimeIPS Server API Module provides the following features:

- Programming API to allow server fuctions using custom scripts
- Supports Employees, Passwords, Jobs and more

Programming Interface:

- Response format: XML, HTTP form-encoded, plain text, or HTML
- Communication interface uses standard HTTP requests (get and/or post)

NOTE: Requires TimeIPS version 1.5.4 or later.

How to use IPSSAPI:

To use IPSSAPI, you will write scripts which will produce URLs that contain parameters that tell TimeIPS what action to take. The URL must contain a username and password for authentication. The username specified for authentication must be an employee marked as a "Script User" in the Remote Clocking interface.

The IPSSAPI module allows you to request TimeIPS to perform the following functions:

Replace the "timeips" below with your TimeIPS master station IP address.

Available Functions:

- checkClock
  - Required: none
  - Optional: format
  - Returns: Current server time
  - Side effects: none
  - Example:
    input: `http://timeips/sapi.php/checkClock?format=xml`
    output: `<time unix='1168987689' month='01' day='16' year='2007' hour='16' minute='49' second='14' />`
- getUsers
  - Required: none
  - Optional: format, fields (a comma separated list of 'nameFirst', 'nameMid', 'nameLast', 'namePref', 'fullName', 'HID', 'username', 'pin', 'permission', and/or 'mgrID')
  - Returns: All visible, active employees
  - Side effects: none
  - Example:
    input: `http://timeips/sapi.php/getUsers?username=admin&password=timeips&format=xml`
    output:

```
<users divisionID="1">
 <user id="1" nameFirst="Test" nameMid="" nameLast="A" namePref="" fullName="A, Test" HID="1" username="a" pin="1234" mgrID="">
  <permission>network</permission>
 </user>
 <user id="2" nameFirst="Test" nameMid="" nameLast="B" namePref="" fullName="B, Test" HID="2" username="b" pin="" mgrID="">
 </user>
 <user id="3" nameFirst="Test" nameMid="" nameLast="C" namePref="" fullName="C, Test" HID="3" username="c" pin="" mgrID="2">
 </user>
</users>
```

- setUsername
  - Required: credentials, newUsername
  - Optional: format, target
  - Returns: Success or failure
  - Side effects: Changes a user's username
  - Example: If the user "admin" wished to change the username for employee "asmith" to "adams"
    input: `http://timeips/sapi.php/setUsername?username=admin&password=timeips&targetUsername=asmith&newUsername=adams&format=xml`
    output: `<setUsername success="1" />`
- setPassword
  - Required: credentials, newPassword
  - Optional: format, target
  - Returns: Success or failure
  - Side effects: Changes a user's login password
  - Example: If the user "admin" wished to change the password for employee "asmith"
    input: `http://timeips/sapi.php/setPassword?username=admin&password=timeips&targetUsername=asmith&newPassword=apple23&format=xml`
    output: `<setPassword success="1" />`
- getNonce
  - Required: credentials
  - Optional: format, target
  - Returns: 32-character nonce (one-use) password
  - Side effects: Sets a nonce password for the user for a one-time login
  - Example: An automated system (with username "master") wishes to create a one-use password for employee "asmith"
    input: `http://timeips/sapi.php/getNonce?username=master&password=any1knows&targetUsername=asmith&format=xml`
    output: `<nonce value="68b329da9893e34099c7d8ad5cb9c940" />`
- getHistory
  - Required: credentials, rangeType {events|minutes|hours|days}, rangeLength
  - Optional: format, target
  - Returns: All time events and benefit/holiday usage for the specified range
  - Side effects: none
  - Example: Employee asmith wishes to see all of his clock events from the past 48 hours
    in: `http://timeips/sapi.php/getHistory?username=asmith&password=apple23&rangeType=hours&rangeLength=48&format=xml`
    out:

```
<history>
 <clock job="102">
  <in month="01" day="15" year="2007" hour="08" minute="03" second="15" />
  <out month="01" day="15" year="2007" hour="12" minute="00" second="03" />
 </clock>
 <clock job="103">
  <in month="01" day="15" year="2007" hour="13" minute="22" second="41" note="Back from lunch late" />
  <out month="01" day="15" year="2007" hour="17" minute="02" second="21" />
 </clock>
 <clock>
  <in month="01" day="16" year="2007" hour="07" minute="59" second="08" />
  <out month="01" day="16" year="2007" hour="12" minute="04" second="34" />
 </clock>
</history>
```

- getJobs
  - Required: none
  - Optional: format
  - Returns: All jobs available for clocking
  - Side effects: none
  - Example:
    input: http://timeips/sapi.php/getJobs?format=xml
    output:

```
<jobs>
 <job name="Inspection" shortName="Insp." code="102" />
 <job name="Clerical" shortName="Clerical" code="103" />
</jobs>
```

- getBenefitTypes
  - Required: none
  - Optional: format
  - Returns: All benefit types available and list of employeeIDs type is hidden from (if any)
  - Side effects: none
  - Example:
    input: http://timeips/sapi.php/getBenefitTypes?format=xml
    output:

```
<benefitTypes>
 <type id="3" name="Sick" counts_toward_ot="1" paid="1' />
 <hidefrom>100</hidefrom>
 <type id="4" name="Vacation" counts_toward_ot="0" paid="1" />
</benefitTypes>
```

- getBenefitStatus
  - Required: credentials (such as username= and password=), target
  - Optional: format
  - Returns: All benefit status information
  - Side effects: none
  - Example:
    input: http://timeips/sapi.php/getBenefitStatus?format=xml&username=admin&password=timeips&targetHID=1001
    output:

```
<benefits>
 <name="Sick" id="3' />
 <current_level>3600.000000</current_level>
 <total_lost>3600.000000</total_lost>
 <total_earned>3600.000000</total_earned>
 <pending_approval>3600.000000</pending_approval>
</benefits>
```

- requestBenefits
  - Required: credentials, target, time (timestamp of benefit request or MM/DD/YYYY H:M:S AM/PM), typeID (benefit type ID being requested), hours (hours of benefit requested)
  - Optional: format, note (benefit request note)
  - Returns: Request Benefit Use
  - Side effects: Requests benefits
  - Example:
    input: http://timeips/sapi.php/requestBenefits?format=xml&username=admin&password=timeips&targetHID=1001&time=1265389567&typeID=3&hours=1¬e=requestedbyapi
    output:

```
<requestBenefits/>
```

- getBenefitRequests
  - Required: credentials
  - Optional: format
  - Returns: Benefit Use Requests
  - Side effects: none
  - Example:
    input: http://timeips/sapi.php/getBenefitRequests?format=xml&username=admin&password=timeips
    output:

```
<benefitRequests/>
 <benefitRequest id="3' />
  <benefitName>Vacation</benefitName>
  <subclassName>FMLA</subclassName>
  <nameFirst>John</nameFirst>
  <nameiLast>Smith</nameLast>
  <nameMid>C</nameMid>
  <requestedAmount>7200</requestedAmount>
  <requestNote/>
  <usageDate>1265640600</usageDate>
  <creationDate>1265640618</creationDate>
 </benefitRequest>
</benefitRequests>
```

- approveBenefitRequest
  - Required: credentials, requestID
  - Optional: format, deny (unless deny is specified, the benefit request will be approved), note
  - Returns: Request Benefit Use
  - Side effects: Approves (or denies) a benefit request
  - Example:
    input: http://timeips/sapi.php/approveBenefitRequest?format=xml&username=admin&password=timeips&requestID=77&deny
    output:

```
<approveBenefitRequest/>
```

Common Parameters:

- format:
  - If omitted, API calls will return to machine-readable HTTP form data.
  - text returns unformatted human-readable text.
  - html returns HTML-formatted human-readable text.
  - xml returns machine-readable XML
- credentials:
  - This will uniquely identify and authenticate a user with scripting privileges who is performing the action.
  - The required fields are "username" and "password".
- target:
  - May be a username (use variable name targetName) or a badge number (use targetHID).
  - This will uniquely identify (but not authenticate) a user with "Script Target" privileges who will receive the action.
  - If omitted, defaults to the user whose credentials are provided.

Parameters may be supplied in any order.

Some functions and parameters require 1.8.15 or later

Scripting

To automate api requests, use your own programs, or write scripts with open-source tools such as "curl" or "wget".

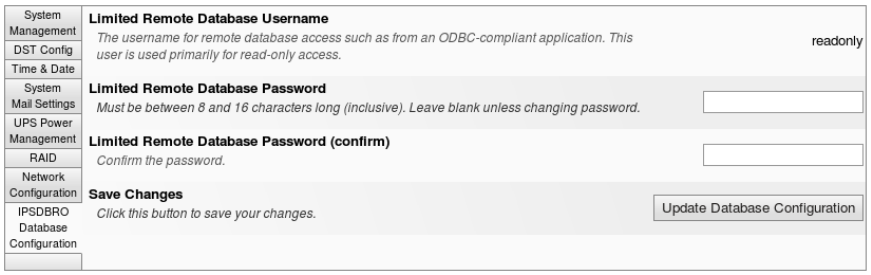
ODBC Access

The TimeIPS® Database Read-Only Access Module allows setting a password to enable read-only access directly to the TimeIPS database. This allows users with database experience to write queries for external applications including custom reporting.

Using the left pane Main Menu » Administration, click on: System » System Settings

Click on the **IPSDBRO Database Configuratoin** tab.

1. Type in a password in the "Limited Remote Database Password:" field
2. Retype the password in the "Limited Remote Database Password (again):" field
3. Click on the Update Database Configuration button



Master Configuration

Database Access

To access the database, you will need an ODBC driver compatible with your operating system.

Visit the MySQL download page for compatible ODBC drivers for many operating systems.

After the ODBC driver is installed, configure it to communicate with your TimeIPS system's IP address and a database called "timecard." The location of the configuration varies by operating system.

As an example, in Windows XP, access ODBC settings by going to Start -> Settings -> Control Panel -> Administrative Tools -> Data Sources (ODBC). Click "Add" to add a new data source and select the MySQL 3.51 driver. Pick a name, like TimeIPS for the connection. Specify the IP address of your TimeIPS System in the Server field. The database name will be '"timecard" and you will use the username "readonly" and the password you configured.

After the ODBC connection is configured, you will need an application that can use ODBC to process queries and/or generate reports. There are many tools available. For example, the free office suite OpenOffice.org 2.0 includes a database component that can be used.

There are many database tables available in TimeIPS. The following list covers some of the main tables with the purpose of the table and notes on using it. The role of tables not listed here are beyond the scope of this document.

Table - Purpose

- users - List of TimeIPS users (employees). The usersID field is used in many other tables to identify the employee. There are over 100 data fields in the users table. The essential fields are:
  - usersID - A unique internal database identifier for the employee
  - isActive - '1' means the user is employeed. Anything else means that are not.
  - empNum - The employee alternate number
  - HID - The employee's badge number
  - nameFirst - The employee's first name
  - namePref - The employee's preferred name (nickname)
  - nameMid - The employee's middle name
  - nameLast - The employee's last name
  - mgrID - The usersID of the employee's direct manager
  - username - The username the employee uses to log into TimeIPS
  - password - A hashed password for logging into TimeIPS
  - title - The employee's title
- eventLog - Raw and adjusted records of the employee clocks. The usersID field relates to the users table. You will normally use the adjTimeIn and adjTimeOut fields for reporting or calculations. The timeIn and timeOut fields are the actual time the clock was created (i.e. the time the event was created, which could be hours or days before or after the paid time). The realTimeIn and realTimeOut are the time the employee actually clocked (before rounding, snapping, or adjustments) and are used to compare the net effect of adjustments vs. actual. All times are stored as Unix Timestamps (i.e. seconds since midnight, Jan 1st, 1970 in GMT). You will need to convert and process these in your reports. There are over 30 fields in the eventLog table. The essential fields are:
  - eventLogID - A unique internal database identifier for the punch
  - usersID - A unique internal database identifier for the employee
  - timeIn - The time the punch-in was created
  - timeOut - The time the punch-out was created
  - adjTimeIn - The paid punch-in time after all adjustments (rounding, snapping, editing)
  - adjTimeOut - The paid punch-out time after all adjustments (rounding, snapping, editing)
  - realTimeIn - The original/intended punch-in time without any all adjustments (rounding, snapping, editing)
  - realTimeOut - The original/intended punch-out time without any adjustments (rounding, snapping, editing)
  - jobID - A unique internal database identifier for the job being worked
  - clockNote - The note left with the clock in
  - clockNoteOut - The note left with the clock out
  - clientIn - A unique internal database identifier for the client that created the punch in
  - clientOut - A unique internal database identifier for the client that created the punch in
  - clientAdjIn - A unique internal database identifier for the client that created the punch in after all adjustments and edits
  - clientAdjOut - A unique internal database identifier for the client that created the punch in after all adjustments and edits
- eventLog_audit - Details on each change made to a time event. When an event is created, modified or deleted, a new record will be created in this table. This can be very helpful when performing a sync to an external database
  - auditID - A unique internal database identifier for the audit
  - eventLogID - A unique internal database identifier for the punch that was modified, created or deleted
  - eventLog_offlinePendingID - An ID indiciating if the event is offline and pending processing
  - eventLogPart - What was modified, for example "in" "out" or "event"
  - auditTime - Unix timestamp of when the audit change occurred
  - editorID - The usersID of the person who made the change (or NULL if made by the system)
  - source - Where the change was made, for example, "time edit" or "group clock"
  - item - What was done to cause the change, for example "create event" "clock in" "clock out" or "job"
  - detail - Human-readable detail of exactly what happened
- jobs - TimeIPS Jobs. The "code" field holds the code that employees enter to clock into the job.
  - jobID - A unique internal database identifier for the job
  - isActive - 0 or 1, to indicate if the job is active (can be used)
  - lcdName - The small display name (short name) that appears on the clock screen
  - code - The job code, used to clock into the job
  - name - The name of the job
  - ctrlNum - A control number, generally used for billing
  - billingRate - A billing rate for this job to customers
  - catID - A unique internal database identifier for the category this job belongs to
  - custID - A unique internal database identifier for the customer this job is for
  - type - The kind of job, "validated" or "flexible" (almost always validated)
  - glNum - The general ledger code for the job
  - description - The description of the job
  - mgrID - A unique internal database identifier for the usersID of the manager of this job

- zones - Time Zones for employees and clients. When creating reports, use the "zoneid" field in the users table to identify the time zone use when adjusting clock timestamps.
- department - Departments
- customers - Customers for Jobs
- payroll_events - Useful for reporting. The payroll_events are processed eventLog events, plus benefits events that are broken into segments for payroll and reporting. This is the table used to produce sign-off reports and payroll exports because it includes the type of pay that is due, such as overtime or doubletime, based on the employees work-weeks and the payroll periods. Please note that this table is NOT updated in real time. It is updated on demand when reports or payroll exports are run.

Please note that the tables sometimes change between versions and the way the data in the tables is used also sometimes changes. If you have critical reports pulling from these tables, we suggest verifying your reports after each TimeIPS upgrade.

Translating Timestamps

Times in TimeIPS are usually stored as Unix Timestamps. Unix timestamps are stored as the number of seconds that have elapsed since the epoch which was midnight Coordinated Universal Time January 1st 1970. This format provides a very accurate and unambiguous record of exactly when an event occurred without the ambiguities caused by time zones or Daylight Saving. It also makes it easy to calculate the duration of an event. For example in the eventLog table the adjusted in and out timestamps can be subtracted to yield the full duration of the event in seconds (adjTimeOut - adjTimeIn).

Timestamps can be somewhat difficult to translate accurately, especially if an employee in question is not following the specific time zone and Daylight Saving rules used by the host TimeIPS server. To that end we have provided our ODBC customers with two functions which allow for easy translation of timestamps.

userDate

Format: userDate(timestamp, usersID, format)

The arguments are as follows

1. The timestamp you want to convert
2. The usersID of the user to use for time zone and DST lookups
3. A format string. Use null for the default format "%m/%d/%Y %h:%i:%s %p" which will translate to something like "04/08/2012 07:27:04 AM". You can construct your own string using the guidelines found here.

Example: SELECT usersID, eventLogID, userDate(adjTimeIn, usersID, null) as "Punch In" FROM eventLog LIMIT 10;

Example: SELECT usersID, eventLogID, userDate(adjTimeIn, usersID, "%W %M %e %Y") as "Punch In" FROM eventLog LIMIT 10;

zoneDate

Format: zoneDate(timestamp, zoneID, format)

The arguments are as follows

1. The timestamp you want to convert
2. The zoneID of the timezone to use for the conversion. This can be found in timecard.zones
3. A format string. This follows the same logic as userDate

Example: SELECT zoneDate(UNIX_TIMESTAMP(), 1, "%m/%d/%Y") as "Today";

Example Querys

Below are some example's on how to construct SQL Querys to pull data out of the system with ODBC.

The following query's are for pulling Benefit data out of the database, as benefit time all calculated on the fly, we can't just pull the data out of the table.

```
-- Used In Range:

SELECT SUM(adjustment) / 3600 as used,usersID,typeID
FROM benefits_logWHERE adjustment < 0
        AND accrualLogID IS NULL
        AND deleted IS NULL
        AND adjusted_on BETWEEN 1363582800 and 1364274000
        AND usersID IN (1)
        AND typeID IN (3)
GROUP BY usersID, typeID;


-- Earned In Range:

SELECT SUM(adjustment) / 3600 as earned,usersID,typeID
FROM benefits_log
WHERE deleted IS NULL
        AND (accrualLogID IS NOT NULL OR (adjusterID IS NOT NULL AND adjustment>0))
        AND adjusted_on BETWEEN 1363582800 AND 1364274000
        AND usersID IN (1)
        AND typeID IN (3)
GROUP BY usersID,typeID;


-- Net In Range:

SELECT u.usersID, tempBenefitLog.typeID, SUM(adjustment) / 3600 as net
FROM users u LEFT JOIN (
    SELECT usersID, typeID, adjustment, adjusted_on
    FROM benefits_log log
    WHERE adjusted_on <= 1364274000
        AND usersID IN (1)
        AND typeID IN (3)
        AND deleted IS NULL
        AND adjustment IS NOT NULL
        AND adjusted_on >= (
            SELECT IFNULL(MAX(occurs),0)
            FROM benefit_reset r
            WHERE r.typeID = log.typeID
                AND r.usersID = log.usersID
                AND r.occurs <= 1364274000
        )

    UNION ALL

    SELECT usersID, typeID, amount as adjustment, occurs as adjusted_on
    FROM benefit_reset r
    WHERE resetID NOT IN (
            SELECT r1.resetID
            FROM benefit_reset r1, benefit_reset r2
            WHERE r1.typeID = r2.typeID
                AND r1.usersID = r2.usersID
                AND r1.occurs <= 1364274000
                AND r2.occurs <= 1364274000
                AND r1.occurs < r2.occurs
                AND r1.typeID IN (3)
                AND r1.usersID IN (1)
        )
AND r.usersID IN (1) AND r.typeID IN (3) AND r.occurs <= 1364274000
) as tempBenefitLog ON u.usersID = tempBenefitLog.usersID
```

```
WHERE u.usersID IN (1)
GROUP BY tempBenefitLog.usersID, tempBenefitLog.typeID;


-- Available At Start

SELECT u.usersID, tempBenefitLog.typeID, SUM(adjustment) / 3600 as net
FROM users u LEFT JOIN (
    SELECT usersID, typeID, adjustment, adjusted_on
    FROM benefits_log log
    WHERE adjusted_on <= 1363582800
        AND usersID IN (1)
        AND typeID IN (3)
        AND deleted IS NULL
        AND adjustment IS NOT NULL
        AND adjusted_on >= (
            SELECT IFNULL(MAX(occurs),0)
            FROM benefit_reset r
            WHERE r.typeID = log.typeID
                AND r.usersID = log.usersID
                AND r.occurs <= 1363582800
        )

    UNION ALL

    SELECT usersID, typeID, amount as adjustment, occurs as adjusted_on
    FROM benefit_reset r    WHERE resetID NOT IN (
            SELECT r1.resetID
            FROM benefit_reset r1, benefit_reset r2
            WHERE r1.typeID = r2.typeID
                AND r1.usersID = r2.usersID
                AND r1.occurs <= 1363582800
                AND r2.occurs <= 1363582800
                AND r1.occurs < r2.occurs
                AND r1.typeID IN (3)
                AND r1.usersID IN (1)
        ) AND r.usersID IN (1) AND r.typeID IN (3) AND r.occurs <= 1363582800
) as tempBenefitLog ON u.usersID = tempBenefitLog.usersID
WHERE u.usersID IN (1)
GROUP BY tempBenefitLog.usersID, tempBenefitLog.typeID;
```

Single Sign On and Password Synchronization

In some cases it may be desirable to have empolyees use the same username and password in TimeIPS and other systems, and/or to provide a single sign on (SSO) option to reduce the number of times employees enter usernames and passwords. There are several approaches to doing this with TimeIPS

Single Sign On: CAPI and Nonce Passwords

To allow empolyees to log into TimeIPS without needing to enter their username and password, use CAPI to set a "nonce" password. This is a password that can be used one time. For additional Information, please contact TimeIPS Technical Support.

Pasword Sync: CAPI and Setting a Password

To keep passwords up-to-date in TimeIPS when changed in an external program, use CAPI to update an employee's password. For additional Information, please contact TimeIPS Technical Support.

Internal Information (visible to Administrators only):
The following contains API details that are not publicly available. Please only provide to authorized representitives of verified customers using the CAPI.

Single Sign On: CAPI and Nonce Passwords

To allow empolyees to log into TimeIPS without needing to enter their username and password, use CAPI to set a "nonce" password. This is a password that can be used one time.

The process works like this:

1. An employee logs in on their computer, for example, username "asmith"
2. The login process on the computer checks with an authority, such as Active Directory or LDAP.
3. If successful, the employee's computer asks TimeIPS to make a nonce password for the user "asmith" for example:
   http://timeips/capi.php/getNonce?username=master&password=any1knows&targetUsername=asmith&format=xml
4. TimeIPS will reply with the nonce password, for example:
   <nonce value="68b329da9893e34099c7d8ad5cb9c940" />
5. The employee's computer then assembles a link to TimeIPS with the nonce password. The link is provided to the employee, for example:
   http://timeips/index.php?username=asmithr&nonce=68b329da9893e34099c7d8ad5cb9c940
6. When the employee clicks this link, TimeIPS will see the nonce password it just provided and will provide a one-time login without the emplyoee needing to enter their username and password

Pasword Sync: CAPI and Setting a Password

To keep passwords up-to-date in TimeIPS when changed in an external program, use CAPI to update an employee's password.

The process works like this:

1. An employee changes their password
2. The employee's computer makes a call to capi to set the new password, for example
3. http://timeips/capi.php/setPassword?username=admin&password=timeips&targetUsername=asmith&newPassword=apple23&format=xml
4. TimeIPS will reply that it process successfully
   output: <setPassword success="1" />

Notes: The IPSCAPI integration module is required for these options. To make the callsl to TimeIPS, either use built-in functions in the scripting language of your choice, or make a system call to an external tool like "curl" or "wget" (standard on Unix/Linux platfroms, download and install on Windows).

TimeIPS Custom Programming Services

Custom programming services are available to implement custom reports, payroll exports, or features based on your company's needs.

Custom Payroll Export or Report Programming

The TimeIPS IPSQBI QuickBooks Integration and IPSEPI Enhanced Payroll Integration modules include a number of reports and support for numerous payroll applications. For non-supported applications, custom payroll/report programming services are available.

The TimeIPS Custom Payroll Export or Report service includes the following:

- Implementation of customized payroll export or other basic reporting/integration with TimeIPS.
- A set quantity of development project time is included. Additional hours can be purchased for an additional fee.

Custom Feature Programming

TimeIPS includes a wealth of time and money saving features to assist you in running your business more efficiently. Some businesses have unique needs. Custom programming services are available that include the design and implementation of custom features specific to your business.

The TimeIPS Custom Feature service includes the following:

- Implementation of customized features or advanced reporting/integration with TimeIPS.
- A set quantity of development time is included. Additional hours can be purchased for an additional fee.

For more information about these services, please contact a TimeIPS Sales Representative at 877-TIMECLOCK (877.846.3256).

IPSABO - Automatic Backup Options

The IPSABO Automatic Backup Options allows users to schedule automatic backups with a TimeIPS Backup Account.

The TimeIPS® Automatic Backup Options module provides the following features:

- Automated FTP backups without a TimeIPS Backup Account
- Automated SFTP backups without a TimeIPS Backup Account
- Automated Email backups without a TimeIPS Backup Account
- Configurable hour-of-the-day for Email and FTP and SFPT backups to run
- Schedule hour-of-the-day for backups to run, up to 24 times per day

Note: Requires TimeIPS Version 1.8.48 or later.

Find more details at the following links:

- IPSABO - TimeIPS Automatic Backup Options Module™
- IPSABO - PDF DataSheet

IPSAPP - Approvals Module

The TimeIPS IPSAPP - Approvals Module™ provides the following request and approval options

- Employees Request Benefit Use, Managers Can Approve or Deny
  - Employees see a Benefits Request option under MyTimeIPS
  - Benefit use can be requested
  - Managers see requests and can approve or deny
  - Email reminders and numerous configuration options
- Employees and Managers Approve Timecards for Payroll
  - Employees see a Timecard Approval option under MyTimeIPS
  - Worked time can be reviewed on a calendar and approved
  - Managers see approved and pending timecards
  - Payroll checks for all approved timecards before running
  - Email reminders and numerous configuration options

Note: Requires TimeIPS version 1.6.21 or later

Find more details at the following links:

- IPSAPP - Approvals Module™
- IPSAPP - PDF DataSheet

IPSASH - Advanced Scheduling

The TimeIPS IPSASH - Advanced Scheduling Module™ is an expansion to the TimeIPS scheduling system (IPSSCH) that allows creating advanced rules and actions for scheduled trigger and times.

- **Advanced Trigger Rules**
  - Trigger schedule rules when multiple selected conditions have (or have not) been met.
  - Option to require all conditions to be met, or any condition may be met.
  - Rules can check for time on (or not on) jobs, work orders, specific job on a work order, specific benefit types, any benefit type, holiday or any type of

time.
        - Rules can specify a minimum and maximum acceptable duration.
        - The duration can be specified as being for an employee's entire tenure, for the current day, current rule interval, consecutive time, or in the last specified number of hours/minutes/seconds.
    - **Advanced Actions**
        - Wide variety of actions including clocking in, clocking out, changing to a set job, changing to a set work order job, sending an alert, denying clocking, deducting time, setting a paid break, or using benefit time.
        - Multiple actions can be specified.
        - Some actions, such as benefit use can interact with daily scheduled hours to meet daily requirements.
        - Actions can be set to happen immediately, after a specified time from the trigger, after a specified time from the last punch, or at a set time in the past or future.
    - **Complex Repeating Rules**
        - Entire schedule can be set to repeat at a user-selected number of days.
        - Groups of employees can use different repeat rules.
        - 7-day schedules use convenient day-of-week naming.
    - **Rule Start and Stop Dates**
        - Rules can have pre-specified start and stop dates and times.
        - Simplifies handling schedules and varying future schedules.

Note: Requires TimeIPS Version 1.8.9 or later.

Find more details at the following link:

- IPSASH - Advanced Scheduling Module™

IPSBEN Advanced Benefits Tracking

The IPSBEN Advanced Benefits Tracking allows users to trac unlimited accrual policies, and benefit types, and unlimited accrual tenure levels.

The Advanced Benefits Tracking module includes:

- Additional accrual tenure levels
- Additional accrual profiles
- Addtional accrual/benefit types

Find more details at the following links:

- IPSBEN - Advanced Benefits Tracking™
- IPSBEN - PDF DataSheet

IPSBRD - Burdened Rate

This Burdened Rate Module provides the ability to create and manage burdened rate which can be configured for each type of pay, for each employee, based on hours worked.

This is ideal for temporary labor where the burdened rate for an employee is calculated based on the employee's pay rate, but varies both by the type of pay (standard time, overtime, double time, sick, vacation, holiday, etc.) and by the total hours worked (520 hours, 1,000 hours, etc.).

Burdened Rate Features:

- Allows the creation of burdened rates per employee.
- Burdened rates can be set for each pay type, including standard time, over time and double time.
- Burdened rates can be set for each benefit type, including sick, vacation and holiday.
- Burdened rates can be set to change as the employee works additional time. As many transition points can be configured as needed, for example, starting at 0 hours, 520 hours, 1,000 hours, etc.
- Burdened rates do not impact pay calculations, but can be used in custom payroll and/or custom reports to show the pay due the employee and the burdened cost for that pay, based on the figures entered.

Also allows configuring cost allocations per employee and per-job cost allocation overrides. Cost allocations allow reporting to designate an employee's worked time as belonging to multiple accounts, customers, projects, etc. Add as many allocations as needed, with codes and amounts for each.

Cost Allocation Features:

- Allows the creation of cost allocations per employee.
- Allows the creation of cost allocations per job. When employees work jobs, job allocations override employee allocations when the code is the same.
- Add as many allocations as needed.
- Each allocation consists of a code and an amount. i.e. code: 10200 gets 25%, 10300 gets 10% and 10400 gets 65%.
- Allocations available in custom reporting and/or custom payroll exports.

Note: Requires TimeIPS Version 1.8.62 or later

Find more details at the following links:

- IPSBRD - Burdened Rate Module™
- IPSBRD - PDF DataSheet
- Duplicate Row and Dynamic Job Allocation Mapping

IPSCDF - Custom Data Fields

The TimeIPS IPSCDF - Custom Data Fields Module is an expansion module to the TimeIPS system that allows the creation of custom data fields for the company and employees to allow improved tracking of specialized information.

- **Allows creating custom data fields per company/division.**
- **Allows creating custom data fields per employee**
- **Benefits include:**
  - Ability to track additional information
  - Match terminology with existing conventions and/or external software
  - Custom company data can be used in payroll exports and custom reporting for translation and lookups.

Find more details at the following link:

- IPSCDF - Custom Data Fields Module™

IPSCLT - TimeIPS Time Clock Station Support

Expand your TimeIPS system with support for additional Time Clock Stations. This module adds one additional time clock station to the maximum number supported by your current system.

Find more details at the following link:

- IPSCLT - TimeIPS Time Clock Station Support Module™

IPSDBRO - Database Read-Only Access

The TimeIPS® Database Read-Only Access Module allows setting a password to enable read-only access directly to the TimeIPS database. This allows users with database experience to write queries for external applications including custom reporting.

Note: Requires TimeIPS Version1.5.7 or later.

Find more details at the following link:

- IPSDBRO - Database Read-Only Access™

IPSDIV - Division

TimeIPS Divisions are designed for companies that own, operate, or provide staff to independent business units. Each Division module allows for the creation of an additional sub-company where virtually all the operations in TimeIPS are available, but the lists of employees, jobs, departments, etc. are totally separate.

The TimeIPS Division module provides the following features:

- Each module provides a license for one additional TimeIPS division.
- Additional modules can be purchased for large installations with many divisions.
- Each division provides complete separation for employees, time worked, overtime rules, schedules, jobs, work-orders, departments, sites, clocks, etc.
- Each division can use site-based functionality such as memberships, coverage and restrictions. Additional site licenses can be purchased and used in divisions, if needed.
- Each clock can be assigned to a division and/or site belonging to the division, so that only employees belonging to the division can use the clock.
- When used with telephone clocking, each telephone clocking unit can be assigned to a site of a division, so that only employees belonging to the division can use the phone number.
- When used with remote clocking, a separate access URL can be provided for each division, and only employees belonging to the division can use the URL.
- Employees in a division can be payroll or employee administrators, and can run payroll and reports, but only for employees belonging to the division.
- Critical system settings (like network addresses and master configuration options) are only available to system administrators belonging to the master division.
- Each division can be assigned one or more managers. When used with the IPSPRM permissions module, the role of the division manager can be completely customized.
- Division managers can receive email alerts when new employees are added to a division.
- Note: Because divisions are made for separate business units, employee transfers between divisions are treated as a lay-off from one division and a hire into another. Time worked, benefits earned, payroll processed, etc. for one division never carries over to a different division.

Note: Requires TimeIPS Version 1.8.62 or later

Find more details at the following links:

- IPSDIV - Division Module™
- IPSDIV - PDF DataSheet

IPSEMA - Employee Mobile Application Clocking License

This Employee Mobile Application clocking license allows one mobile device to run the TimeIPS mobile clocking applet for a single employee. (There are additional modules for mobile application clocking licences in lots of 10, 20, 30, 40, and 50 employees.)

- Allows a single employee to clock using a mobile device.
- Add as many licenses as needed for number of employees with mobile devices.
- Each clock-in/out is tagged with the location based on GPS (if supported in the mobile device).
- Ideal for situations where employees are moving to various job sites and clocking in/out needs to be tracked by site.

Note: Requires Android 2.3 or later.

Find more details at the following link:

- IPSEMA - Employee Mobile Application Clocking License Module™

IPSEML - TimeIPS Email Automation

The TimeIPS Customizable Email, Email Automation and Email reminder module enhances email generation and content to better fit your needs and save time.

Email Customization includes:

- Ability to create templates for most email messages sent by the system.
- Customize email content to include additional instructions such as relevant company policy, a contact person for questions, or how to avoid getting future messages.
- Customizable subject and message body, with option to remove standard message body if needed.

Email Automation includes:

- Ability to run sign-off report and custom report (if IPSRPT module is installed) on an automated basis.
- Select report format, report parameters, date range to run.
- Specify one or more email recipients and an optional FTP upload of the generated report.

Email Reminders include:

- Ability configure reminders for a number of common situations including:
  - On (or selectable days before) an employee's anniversary.
  - On (or selectable days before) an employee's birthday.
  - On a set day each year
  - On a set day on a specific year
  - When an employee's average weekly hours exceed a set amount, with a selectable number of weeks to include in the average.
  - When an employee's average weekly hours are below a set amount, with a selectable number of weeks to include in the average.
  - When an employee's total cumulative hours exceed a set amount.
- Each reminder can run for a single employee or a group of employees. In this context, "run for" means to consider these employees for when reminders should be sent. For example, on an anniversary date or birthday.
- Specify one or more email recipients for the email. This allows notification to go to a manager, empolyee, or several people who may need to see the alert.
- The content of each reminder can be completely customized using the email template system.

Note: Requires TimeIPS Version1.9.4 or later.

Find more details at the following link:

- IPSEML - TimeIPS Email Automation Module™

IPSEMP - TimeIPS 10 Additional Employees

Expand your TimeIPS system with support for additional employees. This module adds 10 additional employees to the maximum supported by your current system.

Find more details at the following link:

- IPSEMP - TimeIPS 10 Additional Employees Module™

IPSEPC - Customizable Payroll

The TimeIPS Customizable Payroll Export Module provides the following features:

- Powerful Custom Payroll Export
- Unlimited, fully mappable fields.
- User defined headers and footers.
- Embedded spreadsheet formulas with row references.
- Per-cell expression evaluation for advanced formatting and customizable logic.
- Multi-level sorting, totaling and summarizing options.
- Automatic report chaining to combine multiple report formats into a single file.

Note: Requires TimeIPS Version 1.5.7 or later and the IPSQBI and IPSIPS modules.
Some functions require TimeIPS Version 1.8.16 or later.

Find more details at the following link:

- IPSEPC - Customizable Payroll Export™

IPSEPI - Enhanced Payroll Integration

The TimeIPS Enhanced Payroll Integration Module provides the following Payroll Exports:

- Advantage Standard
- AmCheck
- BusinessWorks Gold
- Dynamics - Great Plains *
- Easypay Payroll Version 2
- HR Pyramid
- IOI
- JDE (JD Edwards)
- Munis
- Navision
- Paragon 9.1
- PayChoice
- PenSoft-Standard
- PenSoft-Advanced
- Sage: Abra **
- Sage: MAS90 ***
- Sage: MAS200 ***
- Sage: Peachtree (Pro, Complete, Premium and Quantum)
- Sage: Payroll Services
- Sage: MasterBuilder (Integration: Version 14.2 or later)
- Sage: Sage 50 Accounting (New version of Peachtree. Import via Time Tickets)
- Sage: Sage 100 Contractor (New version of MasterBuilder. Import and integration available.)
- Sage: Timberline
- Syndeo
- Time+Plus
- TimeBank
- Vadim

The following additional payroll exports are supported with stand-alone payroll exports:

- Ceridian Insync

Also includes all functions in the Custom Payroll Export:

- Unlimited, fully mappable fields.
- User defined headers and footers.
- Embedded spreadsheet formulas with row references.
- Per-cell expression evaluation for advanced formatting and customizable logic.
- Multi-level sorting, totaling and summarizing options.
- Automatic report chaining to combine multiple report formats into a single file.

* Integration Module for Great Plains required
** Sage import module may be required. Old (pre-sql) versions may require BASpay Interface Module for Abra.
*** An integration module such as Best "Extended Solution PR-1031" or Sage "Visual Integrator" is required.
(Integration modules are purchased separately and may require require mapping or configuration.)

Note: Some formats require TimeIPS Version 2.0.14 or later and/or the IPSQBI and IPSIPS modules.

Find more details at the following link:

- IPSEPI - Enhanced Payroll Integration™

IPSIMP Data Export/Import Module

The IPSIMP Data Export/Import Module allows users to import, export, and update employees, jobs, departments, benefit totals, and much more.

- Employee Information
- Department Information
- Payroll Types
- Benefit Totals
- Jobs
- Job Categories
- Job Customers

Find more details at the following links:

- IPSIMP - Employee Import/Export Module™
- IPSIMP - PDF DataSheet

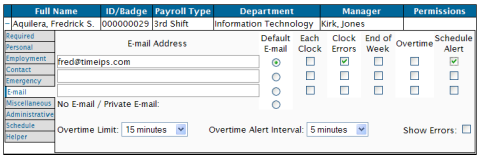
IPSIPS Intelligent Personnel System Upgrade Module

The IPSIPS Intelligent Personnel System Upgrade Module upgrades TimeIPS Digital Time Clocks to Intelligent Personnel Systems which includes system enhancements including schedule deviation alerts, 30 active jobs, and e-mailing backups.

Using the left pane Main Menu » Administration, click on: System » Modules/Upgrades.

IPSIPS Intelligent Personnel System Upgrade Module

The IPSIPS Intelligent Personnel System Upgrade Module upgrades TimeIPS Digital Time Clocks to Intelligent Personnel Systems which include numerous system enhancements such as:



- View weekly work schedules, set e-mail alerts and notifications for schedule deviations, and prevent early clock-ins.
- Track exact time spent on specific jobs/projects with up to 30 active Jobs.
- E-mail nightly backups to a specified address.
- View currently clocked in employees on a computer monitor near the clock in/out point by connecting it directly to the TimeIPS time station.

Find more details at the following links:

- IPSIPS - Intelligent Personnel System Upgrade Module™
- IPSIPS - PDF DataSheet

IPSJOB Enhanced Real-Time Job / Project Tracking

The IPSJOB Enhanced Real-Time Job / Project Tracking module allows tracking of unlimited* active Time-Validated (clock in / clock out) jobs or projects. Each job can have a billing rate and a pay rate, and the pay rate can be different for each employee.

This is ideal for businesses involved in production, assembly, fabrication or service type work involving a wide range of employees across multiple shifts and/or with different pay rates per job.

You'll no longer need to wonder how your employees are spending their time - using the simple, yet effective, real time clock in / clock out functionality of TimeIPS, employees can move quickly from one job to the next throughout the day and TimeIPS will record their clock events in real time.

At the end of each day, week or any period you desire, TimeIPS will provide you the hours and minutes worked, by employee, on each each job they've clocked in and out of. With multiple, simultaneous employee clock in / clock out access to the same job at the same time, your staff can easily record the work they've performed - no matter how many employees are involved in the production or assembly of a job or project. As a bonus, TimeIPS will even let you know the "down time" for each employee based on their clock events so you can better manage your labor costs and maximize your personnel productivity.

Features:

- Allows the creation and management of large numbers of jobs
- Each job can have a Category, Billing Rate, GL number, Control Number and Customer
- A per-job pay rate can be set for work done by employees on the job
- Per-job pay rates include hourly-rate for the job (i.e. $10.00/hour), pay differential per job (i.e. +$2.00/hour) or pay rate multiplier (i.e. 125%)
- Option to set per-employee overrides on the per-job pay, including all the above options
- Option to specify a "job manager" who can view and edit times of any employees who work on their job and who can run reports that include all time on their job, even if they are not the manager of the employees.
- Each employee can have a default job. This is the job they will automatically be working if they don't specify a different job when they clock
- When used in conjunction with the TimeIPS Scheduling module (IPSSCH) automatic job changes can be performed at scheduled times to provide shift differential pay
- When used in conjunction with the TimeIPS Scheduling module (IPSSCH) default jobs can be set for each employee at scheduled times
- When used in conjunction with the TimeIPS Advanced Overtime module (IPSOTO) jobs can be set as standard time, overtime, doubletime, or premium time and can be set to count (or not count) toward overtime calculations. Ideal for paid breaks or special pay outside of normal work hours.
- Payroll reports are fully aware of job differential pay and use it to calculate "base pay" for overtime calculations per federal labor law requirements

Ideal for use in the following applications:

- Assembly and production-based companies
- Professional services firms
- Retail or food service businesses
- Outsource services firms
- Any business that needs the ability to track time and money spent on jobs or projects in real time

* The number of jobs and projects that can be tracked is limited only by the TimeIPS server hardware.

Find more details at the following links:

- IPSJOB - Real-Time Job/Project Tracking Module™
- IPSJOB - PDF DataSheet

IPSJWO - Real-Time Work Order Tracking

The Real-Time Work Order Tracking module provides the ability to create work orders. Each work order can contain one or more jobs, with specific details for what needs to be done on each job.

This is ideal for businesses involved in production, assembly, fabrication or service type work where multiple jobs with specific instructions are required for each customer project and the time on each set of jobs needs to be tracked under a single work order number.

At the end of each day, week or any period you desire, TimeIPS will provide you the hours and minutes worked on each job within each work order.

Features:

- Allows the creation and management of work orders
- Each work order can have a Customer, Name, Code, Start Date, Due Date and PO number set.
- Jobs can be assigned to the work order, and the order in which the jobs must be performed can be set and re-arranged
- A bar-coded PDF page can be generated and printed for each work order. This can be used by employees to clock into the work order so that the jobs on the work order can be tracked.
- Must be used with IPSIPS (provides 30 jobs). If you have more than 30 jobs, also purchase IPSJOB.

Note: Requires TimeIPS Version 1.6.3 or later

Find more details at the following links:

- IPSJWO - Real-Time Work Order Tracking Module™
- IPSJWO - PDF DataSheet

IPSLNK - Custom Links

The TimeIPS IPSLNK - Custom Links Module is an expansion module to the TimeIPS system that allows the creation of custom links to external web pages and file repositories. These links can facilitate employee self-service and can help organize and unify document access.

- **Allows creating custom static links with descriptions per company/division.**
- **Allows creating custom dynamic links to files located on an FTP server. Dynamic links can be configured to scan an FTP folder, identify files that match employees by parts of the filename, and present access to those files by relaying them through the TimeIPS system for security.**
- **Benefits include:**
  - Ability to provide employees with links to external documents and resources
  - Unified location for employees to access various files and resources
  - Access restrictions based on TimeIPS hierarchical permission system.

Find more details at the following link:

- IPSLNK - Custom Links Module™

IPSLOGIN - Login Integration

The TimeIPS Login Integration module allows employee passwords to be validated by an external system instead of the TimeIPS built-in password database.

Current supported external systems:

- **LDAP**

Note: Requires TimeIPS Version 1.8.60 or later

Find more details at the following link:

- IPSLOGIN - Login Integration (LDAP, etc.) Module™

IPSMMA - Manager Mobile Application Clocking License

This Manager Mobile Application clocking license allows one mobile device to run the TimeIPS mobile clocking applet for a single manager employee.

- Allows a single manager employee to clock using a mobile device.
- Add as many licenses as needed for number of managers with mobile devices.
- Each clock-in/out is tagged with the location based on GPS (if supported in the mobile device).
- Ideal for situations where managers of a crew of employees are moving to various job sites and clocking in/out needs to be tracked by site.
- Manager can view list of employees, clock employees in/out, enter benefit time for employees and check employee schedules.

Note: Requires Android 2.3 or later

Find more details at the following link:

- IPSMMA - Manager Mobile Application Clocking License Module™

IPSOTO - Advanced OverTime Options

The TimeIPS IPSOTO - Over Time Options Module™ provides extensive and advanced overtime rule options.

- **Set Daily Overtime and Doubletime Worked Hours**
  - For each day of the week, set the number of hours worked before Overtime or Doubletime goes into effect
  - This allows for rules such as any work on Sunday is paid at Doubletime, or work after 4 hours on Friday is Overtime
- **Additional Overtime Level for Premium Time**
  - Additional overtime level for Premiumtime
  - This allows for Doubletime-and-a-half, Triple-time or other user-defined pay multiplier level as needed
- **Holiday Time can be Overtime, Doubletime or Premiumtime**
  - Set work done on a Holiday to be either Normal or Overtime, Doubletime, or Premiumtime
- **Override time events to any pay type and count (or not count) toward overtime**
  - Override any work done at any time to Default, Standardtime, Overtime, Doubletime or Premiumtime
  - Override any work done at any time to count (or not count) toward satisfying overtime levels for the day/week
  - Override pay type, counts toward overtime, pay, differential and multipliers together or independently
- **Jobs can be set to any pay type and count (or not count) toward overtime**
  - Set any work done at any job to Default, Standardtime, Overtime, Doubletime or Premiumtime
  - Set any work done at any time to count (or not count) toward satisfying overtime levels for the day/week
  - Options can be set per job and/or per employee
  - Set pay type, counts toward overtime, pay, differential and multipliers together or independently

Note: Requires TimeIPS Version 1.8.5 or later to be fully functional.

Find more details at the following links:

- IPSOTO - Advanced OverTime Options Module™
- IPSOTO - PDF DataSheet

IPSPRM - Enterprise Permissions

The TimeIPS® Enterprise Permissions Module provides the following features:

- Ability to create and manage permission groups that grant access or control over user-selectable groups of items.
- The items that can be controlled are virtually everything in TimeIPS. For example: employees, jobs, departments, employee pay rate, job codes, work orders, etc.
- The access or control levels include viewing, creating, deleting, and editing.
- Which items have access or control can all be based on the item being managed by you, being in your department, being in a site you manage, being in your division, being in a division you manage, etc.
- Employees can be assigned to one or more permissions groups. Thus, each employee will get the sum of all permissions granted by all groups assigned to them.
- Passwords can be configured to expire after a configurable number of days, and employees can then set a new password for themselves.

Note: Requires TimeIPS Version 1.8.62 or later

Find more details at the following links:

- IPSPRM - Enterprise Permissions Module™
- IPSPRM - PDF DataSheet

IPSPWT - Piecework, Tips, Commissions and Bonuses

This powerful upgrade module provides the ability to create and manage piecework. Multiple custom piecework items can be created to accommodate a wide range of per-item and non-worked-time-based pay including units, tips, commissions and bonuses.

This is ideal for businesses involved in production, assembly, fabrication or service type work where employees have per-unit, per-sale, or performance based incentive pay.

Each piecework item can be configured as discretionary or non-discretionary, to exempt or include it in FLSA base pay calculations.

Features:

- Allows the creation and management of custom piecework items.
- Each piecework item can have monetary pay, or can be fractions-of-an-hour pay.
- Piecework pay rates can be set for all employees with exception/override for selected employees.
- Pay codes can be set per piecework for cost tracking and allocation.
- Pay for piecework is computed into FLSA base rate for the week to facilitate labor law pay compliance.

Note: Requires TimeIPS Version 1.8.48 or later

Find more details at the following links:

- IPSPWT - Piecework, Tips, Commissions and Bonuses Module™
- IPSPWT - PDF DataSheet

IPSQBI Payroll Integration with Benefits Tracking Module

The Payroll Integration and Benefits Tracking module includes integration with the QuickBooks payroll program as well as the generation of export files for a number of popular payroll software applications including:

- QuickBooks
- ADP
- Mutliple versions of Paychex
- many of the most popular payroll software programs.

The Payroll Integration and Benefits Tracking feature also allows you to:

- Define custom work weeks for employees.
- Track employee benefit usage.
- Automatically accrue benefits based on start date with two tenure levels.
- Automatically apply holiday pay to identified payroll types.

Find more details at the following links:

- IPSQBI - Payroll Integration with Benefits Tracking Module™
- IPSQBI - PDF DataSheet

IPSREM Remote Clocking Module

The IPSREM Remote Clocking Module provides web based clocking support for employees.

WEB BROWSER

- The Remote Employee Clocking feature allows up to 10 employees to clock in and out from a computer terminal networked with your TimeIPS server.

Find more details at the following links:

- IPSREM - PC and Web-Based Clocking for Mobile Devices ™
- IPSREM - PDF DataSheet

IPSREMDTC - Remote Clocking License for 1 Desktop/Laptop

This remote clocking license allows one computer to run the TimeIPS desktop/laptop clocking applet. Normally used in conjunction with the BIO-OPT-USB TimeIPS USB biometric scanner, sold separately.

- Allows unlimited employees to clock using one copy of the TimeIPS desktop applet.
- Add as many licenses as needed for number of computers where employees clock.
- When used with the TimeIPS biometric scanner (BIO-OPT-USB), allows biometric authentication of desktop/laptop remote clocking.
- Ideal for situations where biometrics are needed but a standard TimeIPS Network clock is not suitable for the environment.

Note: Requires Windows XP, Windows Vista or Windows 7.

Find more details at the following link:

- IPSREMDTC - Remote Clocking License for 1 Desktop/Laptop Module™

IPSREMDTE - Remote Clocking via Desktop/Laptop for 1 Employee

This remote clocking license allows one employee to clock using the TimeIPS desktop/laptop clocking applet. Normally used in conjunction with the BIO-OPT-USB TimeIPS USB biometric scanner, sold separately.

- Allows one employee to clock using the TimeIPS desktop applet.
- Add as many licenses as needed for number of employees who will clock from computers.
- When used with the TimeIPS biometric scanner (BIO-OPT-USB), allows biometric authentication of desktop/laptop remote clocking.
- Ideal for situations where biometrics are needed but a standard TimeIPS Network clock is not suitable for the environment.

Note: Requires Windows XP, Windows Vista or Windows 7.

Find more details at the following link:

- IPSREMDTE - Remote Clocking via Desktop/Laptop for 1 Employee Module™

IPSRPT - TimeIPS Custom Reporting

TimeIPS Custom Reporting includes

- **Site Summary Report** - A custom special report that allows data to be filled in on a spreadsheet template. Output is summarized by Site, with a separate page for each site. (Also requires at least one IPSSITE module). See support.timeips.com for more details.
- **Custom Payroll Report** - A special report that allows the custom payroll engine to be used on any selected dates, for any selected employees to generate custom reports. Supports custom fields, headers, summary, sorting, formatting, paycodes, stored templates and more. Supports standard ascii text files (csv). Also includes direct output to xls, pdf and html with colors, fonts, background control, merged cells and prioritized styles.

Note: Requires TimeIPS Version 1.6.22 or later. Some features require 1.11.23 or later

Find more details at the following links:

- IPSRPT - TimeIPS Custom Reporting Module™
- IPSRPT - PDF DataSheet

IPSSCH - Scheduling

The TimeIPS IPSSCH - Scheduling Module™ is an expansion module for the TimeIPS system that offers the flexibility of automatic clock controls for less deviation from scheduled work hours. With features such as Time Rounding, Time Snapping and Automatic Lunch Deductions, employers can use the TimeIPS IPSSCH Scheduling Module to prevent early clockins, eliminate the hassles of clocking in/out for lunches and accommodate time worked away from the clocking site. The Group Clocking feature offers the capability for managers and administrators to clock an entire group of employees in or out, drastically simplifying the manual time adjustment for groups of employees that may be working offsite, etc. Additionally, this module allows employers to import/export schedules and send automatic emails to employees within the employee management tab. Global settings make scheduling your workforce even easier by applying the same set of rules to all schedules. With features like setting automatic clocking times for employees on set schedules, optional automatic clocking of employees into different jobs at specified times, the ability to set minimum breaks, and the functionality of using job clocking to provide for pay differential, the Automatic Clocking feature makes the TimeIPS system a powerful tool for managing your work force.

- **Time Rounding**
  - Round employee clock-in/out times to the nearest 1, 5, 6, 10, 15, 25, 30, 45 or 60 minute
- **Time Snapping**
  - Prevent early clock-ins by snapping clock-in times forward to a designated start time
  - Accommodate early departures with after-work activity by snapping clock-out times forward to a designated end time
  - Set up to eight time snaps per employee or by group
  - Set time snaps for all days, or selected days of the week
- **Auto Lunch Deductions**
  - Automatically clock selected employees out for lunch and/or a break after a designated number of worked hours
  - Eliminates the hassle of clocking out/in for lunch or break
  - Option to not deduct lunch if a lunch or break of the specified length was already taken
- **Group Clocking**
  - Clock in/out a group of employees at one time
  - Option to clock into a job and to set a clock note
  - Drastically simplifies the process of manually adjusting time for each employee
- **Automatic Clocking**
  - Automatically clock employees in, out or change jobs at set times. Used to clock employees out who forget to clock, or for employees on set schedules who don't need to clock.
  - Automatically clock employees out or change jobs after being clocked in for a set duration. Used to clock employees out who forget to clock.
  - Specify a default job for employees at set times. Used to automatically put employees in correct jobs, and to provide pay differentials via job pay rates at scheduled times.
  - Specify a minimum break for employees. Used to prevent employees who try to return from break or lunch too soon.
- **Repeating Schedules and Advanced Options**
  - Allows for a set of parameters to be applied to all employees' schedules within the system.
  - Schedules can be repeated from 1 week up to 16 weeks with an option for the schedule to be made visible in the ﷺ section of My TimeIPS when the employee is logged on. Option to allow employee to see previous week's schedule and a user defined number of future weeks of schedules.
  - Also includes an option to email the employees their schedules at a chosen time interval.
- **Hours-Balance-to-Schedule for Salary Employees**

- Allows automatic balancing of hours for salary employees.
- Balance can be set to apply at the end of each day, or for a set number of days retroactively.
- Balance can adjust work time and/or benefit time to ensure hours match schedule.
- Alert system provides notice of when hours-to-schedule balance is needed and what automatic changes were made.
- *Salary Employee balance requires TimeIPS version 1.9.7 or later.*

Find more details at the following links:

- IPSSCH - Scheduling Module™
- IPSSCH - PDF DataSheet

IPSSDIV - Sub Division

TimeIPS Sub Divisions are designed for companies that need separation of responsibility and visibility based on where the work is done, rather than who did the work. For example, a PEO may have employees that work for multiple clients. If each client is in a sub-division, they would only see the work done for them. They would not see work done for other clients, even when employees work for multiple clients. In another example, managers responsible for distinct areas in a business may need control over time spent in their area, but not over any other work done by the same employees.

The TimeIPS Sub Diivision module provides the following features:

- Ability to create as many Sub Divisions as needed.
- Each Sub Division provides separation for work done by employees.
- Employees can work in multiple Sub Divisions.
- Each clock can be assigned to a Sub Division, so that all work done at the clock automatically connects to the Sub Division.
- Managers of Sub Divisions can be configured to set permissions for responsibility and visibility.

Note: Requires TimeIPS Version 1.10.1 or later.

Find more details at the following link:

- IPSSDIV - Sub Division Module™

IPSSEC - Enterprise Enhanced Security

The TimeIPS® Enterprise Enhanced Security Module provides the following features:

- Encrypted data communication between all TimeIPS clocks.
- Secure (HTTP SSL) site login and administration.
- Highest level Secure Socket Layer (SSL) encryption utilizing AES block cipher
- Ability to generate high security 1024-bit RSA encryption key certificates
- Enhanced firewall protection. Internal stateful firewall blocks all traffic except TimeIPS critical ports.

Find more details at the following links:

- IPSSEC - Enterprise Enhanced Security Module™
- IPSSEC - PDF DataSheet

IPSSFT - Shift and Shift Differential

The TimeIPS Shift module allows shifts to be created and time entered for those shifts.

The TimeIPS® Shift module provides the following features in 1.6.32 or later:

- Allows the creation of multiple shifts, with customer specified names.
- Hours worked on a shift can be manually entered.
- Time can be entered for multiple days and multiple employees at one time.

Additional functionality in 1.8.40 or later includes:

- Assignment of employees to shifts and tracking over time
- Unlimited pay differentials per shift, including start, stop, duration and repeat for each
- Counts toward overtime option per shift differential
- Pay Type (Standard Time, OverTime, DoubleTime, etc.) per shift differential

Find more details at the following links:

- IPSSFT - Shift and Shift Differential Module™
- IPSSFT - PDF DataSheet

IPSSITE - TimeIPS Site Management

The TimeIPS® Site Management Module provides the following features:

- Each module provides an additional site.
- Additional modules can be purchased for large installations with many sites.
- Each site can contain one or more TimeIPS clock stations.
- When used with remote clocking, sites can be defined by the IP address of the clocking computer.
- When used with telephone clocking, sites can be defined by the callerID of the calling person.
- Each site can restrict clock in/out to employees belonging to the site.
- Each site has open/close schedule with minimum and maximum clocked-in employees.
- Schedule violations can alert site supervisors and/or managers.
- If a site loses network connectivity, a designated list of phone numbers can become white listed for phone clocking.
- If a site loses network connectivity, it can present a custom message to employees, such as a number to call for phone clocking.
- Site managers can add employees to the site and can edit time punches for employees of the site.

Find more details at the following link:

- IPSSITE - TimeIPS Site Management Module™

IPSSYNC - Automated Synchronization

The TimeIPS Automated Synchronization module allows employee and job data in TimeIPS to be synchronized with an external system.

Custom mapping is available for fields from the external system to fields in TimeIPS.

The synchronization process can be configured to run automatically as often as once per hour.

Data in TimeIPS is always updated to match the data in the external system.

Employees and/or jobs that are missing in TimeIPS will be created automatically.

A master unique identifier is used for each employee and job to ensure correct matching with the external system.

Current supported external system: **Sage MasterBuilder**

Find more details at the following link:

- IPSSYNC - Automated Synchronization Module™

IPSVTE - Visual Time Edit

The TimeIPS Visual Time Edit module allows employee work and schedules to be viewed and edited in a visual presentation.

Note: Requires TimeIPS Version 1.9.2 or later

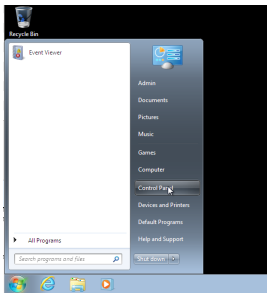
Find more details at the following link:

- IPSVTE - Visual Time Edit Module™

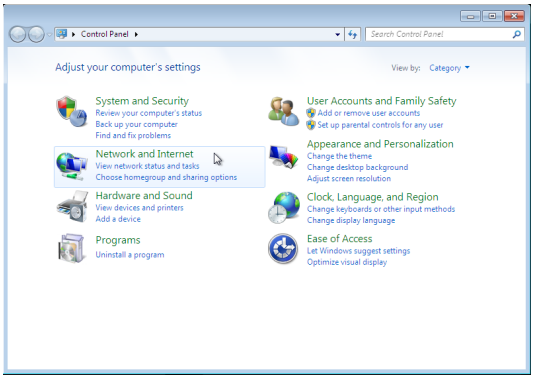
Internet Connection Sharing

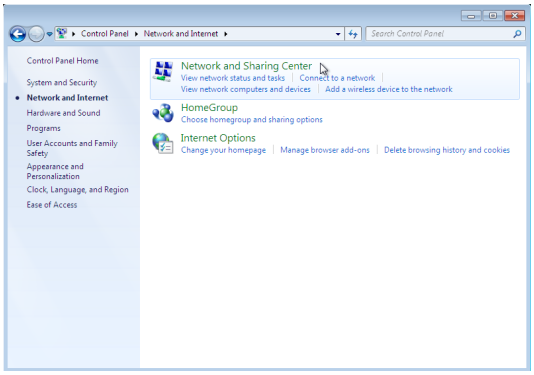
Step 1
Make sure you have a free Ethernet (network) port on your laptop.

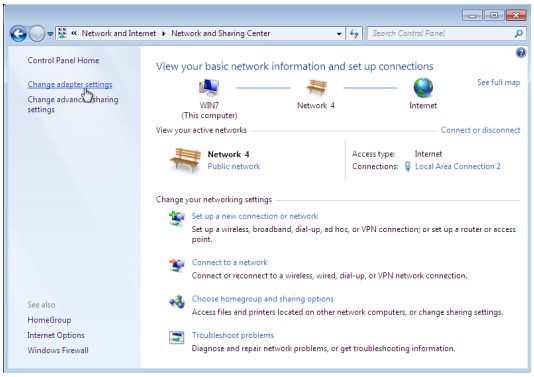
Step 2
Turn on the PC. Once it finishes booting up, click the "Start" button and then "Control Panel" to open the Control Panel.



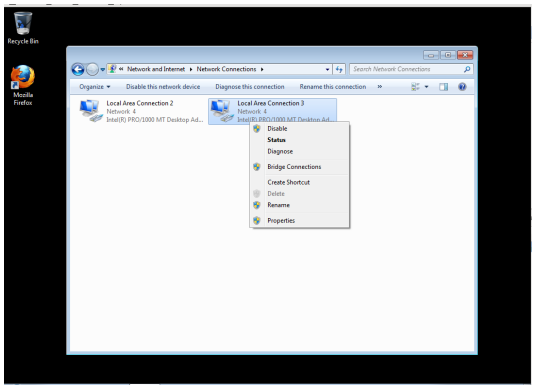
Navigate to the network adapter menu by clicking "Networking and Internet," "Network Sharing Center" and then selecting "Change Adapter Settings."



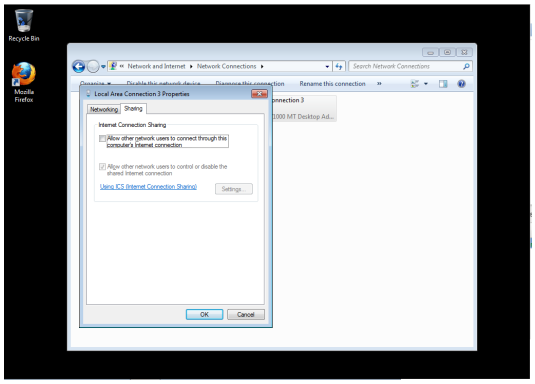




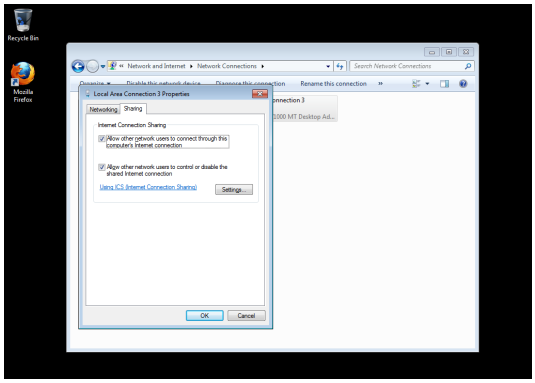
Step 3
Right-click the connection that you want to share with the Time-clock (Make sure you pick your Wireless/Aircard connection), and then select "Properties." You may be asked to provide your administrator password.



Step 4
Select the "Sharing" tab of the connection properties window.



Check the check-box labelled "Allow other network users to connect through this computer's Internet connection," then press "OK."



Step 5
Connect one end of the Ethernet cable to the PC's Ethernet port, and the other end to the Time-clock's Ethernet port. Turn on the Time-clock if it isn't already on.

Your clock should be connected to the internet now.

Email to SMS Gateways

Most mobile phone providers provide an email address that can be used to relay an email to a text message. This can be helpful for getting real-time alerts to employees and managers.

The following are provided for reference and may be subject to change by the providers at any time. Please note that SMS charges may apply to phones that receive messages unless unlimited texting is included in the phone plan. Please check with each employee before configuring anyone to receive text messages

- AT&T Use the format number@txt.att.net
- Boost Mobile Use the format number@myboostmobile.com
- T-Mobile USA Use the format number@tmomail.net
- Nextel (now Sprint Nextel) number@messaging.nextel.com
- Sprint PCS Use the format number@messaging.sprintpcs.com
- Sprint PCS - Short Mail Use the format number@sprintpcs.com
- Alltel Use the format number@message.alltel.com
- Verizon Wireless Use the format number@vtext.com
- Bellsouth Use the format number@bellsouth.cl
- US Cellular Use the format number@email.uscc.net
- Virgin Mobile USA Use the format number@vmobl.com

- Metro PCS Use the format number@mymetropcs.com
- Metro PCS Use the format number@mymetropcs.sms.us

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