316-264-1600



Date printed: 08-27-2014 Last updated: 11-06-2013

To view our complete support knowledge base and most current version of this article visit support timeins com

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.

NEW icon. P: The features and enhancements included in the most recent release of TimeIPS may be indicated with the 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 iminor 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 🗯

- Updated base system components for improved performance, compatibility and expanability Support for Spanish language in Telephone Clocking Enhanced control over day boundaries in the Sign Off Report

- China the columns from Custom Reporting ption 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
- Emanced control over day boundaries in the sign of 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
- Deption 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

- An order of the port of the system components. Some often inter of natural elevers with need a natural elevers in the set of the need and set of the need a natural elevers with need a natur

 - When using behinds for employees, it is now possible to set the default time-or-oay for the behind to begin, even when the employee has no schedule.
 Improvements have been made to the tags in the system for visually impaired users.
 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 and/for work days.
 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.
 Walk-up clocks can be set to show text in English or Spanish. This is configured on the General tab for each clock.
 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 dex clocked in.
 - 6. Enliptive stretcules can be configured to prefer the more stretcules can be configured for a single work order job, to track time vs. the budget for that job.
 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.

- an 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

 - Actuals can be compared to that modulation below of a left acculation, and a number of special cases, such as when acculations and modulation in a left acculation between this could cause changes in an acculation results, when compared to 1.x system. After upgrade, be sure to review acculations for expected results.
 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 are used to figure the qualification.
 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

 - A new payroll API module (IPSPAPI) allows external systems to run custom reports with up-to-date payroll acluations, including shares and reports and reports with up-to-date payroll acluations, including shares and reports and reports
 - 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
 - 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 significant changes, features and enhancements. Minor versions include significant enew 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 <u>TimeIPS Services</u> 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	n 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.

٠	Version 1.6
٠	Version 1.5
٠	Version 1.4
٠	Version 1.2
٠	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.

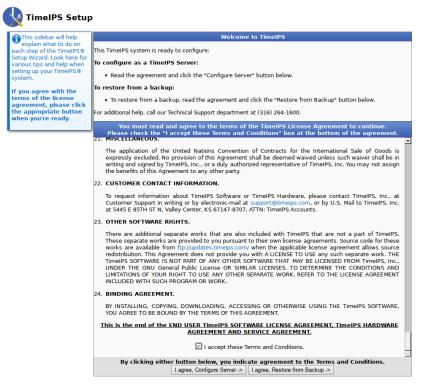
TimeIPS VM & Hardware Server: Initial Configuration

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.



🕑 New Tab - Mozilla Firefox		
<u>File Edit View History Bookmarks Tools H</u> elp		
System Setti	Add New Em	× +
😵 🛞 http://10.0.2.15 🗸 🦉	8 ▼ Google 🔍	4

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.

pany name,	Company In	formation	
Company Name: •	Phone Number: •	Add	ress:
Website:			
		• Re	equired Field
	Adminis		
First Name: •	Last Name: •	Bad 1000	ge Number: •
Username: •	Password: •	E-m	ail Address: •
Pay Type: •	Status: •	Star	t Date: •
Hourly	▼ Full Time		7/2014
	Time/Date Co	onfiguration	
after the name. Automatic Time Synchroniz	ation (Recommended)	Use Local Clo	ck (Not Recommended)
d eventually resulting in incorr available on your local netwo Server: Enter the NTP server you wis (Recommended: ntp.timeips	ork. If you have a firewall, b sh to synchronize to.	e sure that port 123	
	Network	Settings	
	IP Address:	10.0.2.15	•
☑ Make permanent (static)			

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.



System Setup Complete!

Please print this page for your records and store it in a secure location. Have it available if you find the need to contact us.

Wait a few moments while the master station activates your changes. If you have an LCD display attached to your TimeIPSØ master station, it will inform you when the station is ready. The status line below will also link you to the configuration page when the station is available.

Your station is ready. Click here to configure: http://192.168.1.73

If the master station is not yet ready, you will receive a time-out message from your web browser. If you still receive a time-out message after 15 minutes and the LCD display does not show a configuration address, please call our Technical Support department at (316) 264-1600.

Important: Once you reach the "Welcome to TimeIPS" main page, log in as the system administrator, click "Administration" and then click "Updates." On the Updates page, click the "Update Now" button to receive the latest performance enhancements for your TimeIPS system.

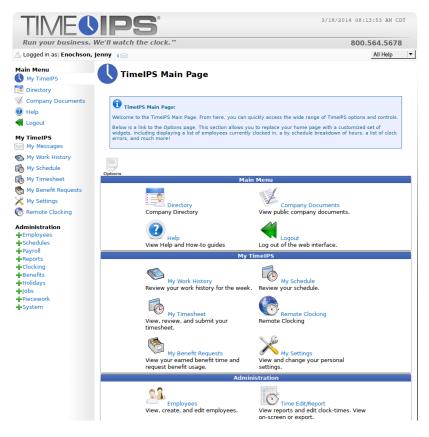
TimeIPS Initial	Configuration
Date:	03/17/2014 12:39 PM
Serial Number:	A08000S25501911
Registration Number:	unregistered
Administrator Username:	test
Administrator Password:	testtest
IP Address:	192.168.1.73
Subnet Mask:	255.255.255.0
Default Gateway:	10.0.2.2
System Mail Server:	localhost
System Mail Username	:
System Mail Password:	

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 **<u>Holidays</u>** and your **<u>New Employee Defaults</u>** 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

Se Ei	24 Employee Administration						
Add Employee	View Print Audit Badges						
		Search and Display Options					
	▲ Full Name	Employees Organizational Unit ID/Badge Status Pa	ayroll Type Manager				
	Enochson, Jenny	Administration 1000 FT	Direct Not Set				
\bigtriangledown			100 🔽				

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 New	r Employee			
Employee Administration	Print Badges			
	A	dd New Employee		
First Name:		Last Name:		
ID / Badge:	1001	Start Date:		03/18/2014
Organizational Unit:	Administration 💌	Work Week Group:		Direct 💌
Payroll Type:	Direct -	Default Departmen	t: Optional	- No Department - 💌
Pay Type:	Hourly 💌	Default Job: Option	al	None - 💌
Shift:	None 💌	Manager:Optional		None 🛛 🔻
Employed:	Yes]	Add Accrual	Schedule
		Create Employee		

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: <u>What's Next?</u> <u>What's New in TimeIPS?</u> <u>Initial Configuration of a ASP System</u>

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.

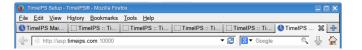
The Configuration Process

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

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 <u>Understanding Overtime Policies and</u> <u>Workweek Groups</u> and be sure that when adding employees, you assign them to an appropriate Workweek group. It is a good idea to also configure <u>Holidays</u> and your <u>New Employee Defaults</u> 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

0

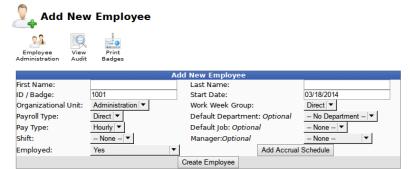
See the Tabbed Employee Administration View for more information about the different employee tabs.

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

Employee Administration							
Add Employee	View Pr	int Iges					
Search and Display Options							
			Employee				
	🔺 Full Nam	e	Organizational Unit	ID/Badge	Status	Payroll Type	Manager
	Enochson, Je	nny	Administration	1000	FT	Direct	Not Set
\bigtriangledown							100 🔽

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!



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 youl 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:

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
 - Manager Training Provide a link to, or print and distribute the <u>Manager's Guide to TimeIPS</u> to all managers using the TimeIPS system. Additionally, there is a *Manager Introduction Video* located at <u>TimeIPS Training Videos</u>.

Employee Training - Prepare and distribute the <u>Employee's Guide to TimeIPS</u> 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 <u>TimeIPS Training Videos</u>

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.



<u>Payroll Types</u>
 <u>Import/Export Payroll Types</u>

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

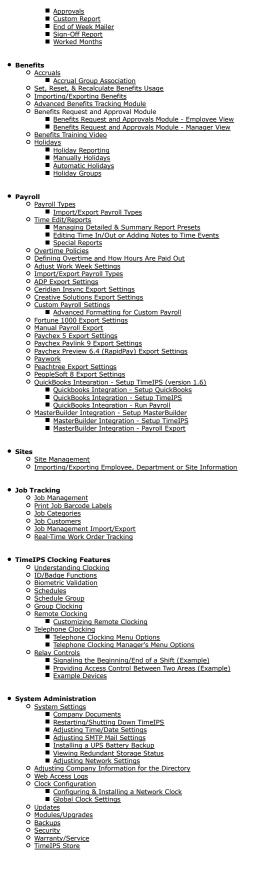
Employees

- Employee Management
 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
 - O Entering Company Information for the Directory
 Employee Directory
 Employee Status View
 Addina/Removing a Status Message
 Using Global Status Message
- TimeIPS Reports
 - Overview of TimeIPS Reports
 Time Edit Reports
 - <u>Time Edit Reports</u>
 <u>Managing Detailed & Summary Report Presets</u>
 <u>Editing Time In/Out or Adding Notes to Time Events</u>
 <u>Addit Report</u>
 <u>Addit Report</u>
 <u>Employee Summary Report</u>
 <u>Site Summary Report</u>
 <u>Site Summary Report</u>
 <u>Default Job Report</u>
 <u>Default Job Report</u>
 <u>Employee Report Card</u>
 <u>Management Hierarchy</u>

 - Management Hierarchy

 - Management Hierarcny Absentee Report Attendance Hours Attendance Percentage Report Break Violation Report Schedules Per-Hour

 - <u>Schedule Violations</u>
 <u>Tardy Report</u>
 <u>Tardy Report by Schedule</u>



• Troubleshooting

<u>Cannot Send/Receive E-</u>	
 Data is Cut Off When Pri Password Reset/Forgotte 	nting Through the Web Browser
 LCD Display Has Rows of 	
 LCD Display is Black 	
 Ports Used By TimeIPS TimeIPS Will Not Power (20
Unable to Access TimeIP	
 Relay Control Does Not A 	<u>activate</u>
DynDNS Wide Area Network	
 Wide Area Network 	
• Enhancing Your TimeIPS	Svstem
 Modules/Upgrades 	
 <u>IPSABO - TimeIPS</u> <u>IPSABO - PD</u> 	Automatic Backup Options Module™
 IPSABO - PD IPSAPP - Approvals 	
IPSAPP - PDF	DataSheet
	<u>I Scheduling Module™</u>
 <u>IPSBEN - Advance</u> <u>IPSBEN - PD</u> 	F DataSheet
 IPSBRD - Burdener 	d Rate Module™
■ <u>IPSBRD - PD</u> 0 IPSCAPL - TimeIPS	F DataSheet Client API Module™
 IPSCAPI - TimeIPS IPSCDF - Custom I 	Data Fields Module™
 IPSCLT - TimeIPS 	Fime Clock Station Support Module™
O IPSDBRO - Databa O IPSDIV - Division N	se Read-Only Access™
 IPSDIV - Division N IPSDIV - PDI 	DataSheet
 IPSEMA - Employe 	e Mobile Application Clocking License Module™
O IPSEML - TimeIPS O IPSEMP - TimeIPS	Email Automation Module™ 10 Additional Employees Module™
IPSEPC - Customiz	able Pavroll Export™
 IPSEPI - Enhanced 	Payroll Integration™
O IPSHOTSCH Hot So O IPSIAPL - TimoIPS	:hedules Integration Module™ Import/Export API Module™
 IPSIAPI - IIIIEIPS IPSIMP - Employee 	Import/Export Module [™]
IPSIMP - PDF	DataSheet
	t Personnel System Upgrade Module™
 IPSIPS - PDF IPSJOB - Real-Time 	o Job/Project Tracking Module™
IPSJOB - PDI	DataSheet
 <u>IPSJWO - Real-Tim</u> <u>IPSJWO - PD</u> 	e Work Order Tracking Module™ E DataSheet
 IPSLNK - Custom L 	inks Module™
IPSLOGIN - Login 1	integration (LDAP, etc.) Module™
O IPSOTO - Advance	Mobile Application Clocking License Module™ OverTime Options Module™
IPSOTO - PD	F DataSheet
O IPSPAPI - TimeIPS	Payroll API Module [™]
 IPSPRM - Enterpris IPSPRM - PD 	<u>e Permissions Module™</u> F DataSheet
O IPSPWT - Piecewor	k, Tips, Commissions and Bonuses Module™
■ IPSPWT - PD Q IPSOBI - Payroll In	
■ <u>IPSQBI - Payroli In</u> <u>IPSQBI - PDI</u>	tegration with Benefits Tracking Module™ DataSheet
O IPSREM - PC and V	Veb-Based Clocking for Mobile Devices ™
IPSREM - PD	F DataSheet
O IPSREMDTC - Rem O IPSREMDTE - Rem	ote Clocking License for 1 Desktop/Laptop Module™ ote Clocking via Desktop/Laptop for 1 Employee Module™
 IPSRPT - TimeIPS 	Custom Reporting Module™
IPSRPT - PDI O IPSSAPI - TimeIPS	DataSheet
 <u>IPSSAPI - TIMEIPS</u> <u>IPSSCH - Schedulin</u> 	a Module™
IPSSCH - PD	F DataSheet
IPSSDIV - Sub Div	ision Module™
 IPSSEC - Enterpris IPSSEC - PD 	e Enhanced Security Module™ E DataSheet
 IPSSFT - Shift and 	Shift Differential Module™
IPSSET - PDF	DataSheet
 IPSSITE - TIMETPS IPSSYNC - Automa 	Site Management Module™ ted Synchronization Module™
• IPSVIE - Visual Tir	ne Edit Module 🖻
 <u>TimeIPS Technical Suppo</u> 	rt™ - (60 minutes)
 <u>TimeIPS System Passwor</u> 12-Month TimeIPS Update 	<u>a kecovery™</u> te™
 12-Month TimeIPS Off-S 	

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	Ham / * 85 Letit Luis 12
Num Lock (if present)	Keypad Lock	Locks and unlocks the keypad	7 8 9 7259 7299 4 5 6 +
Esc (if present)	Escape	Cancels the current input or exits the current menu	1 2 Anter End 4 Pagen Enter
0-9	Number Keys	Used to enter ID numbers and job codes	Una Del
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 <a>Job Tracking

Clock-In to a Job/Change to a New Job
O Type the Job Code * and an Employee ID/Badge Number and press [Enter].
Example: 4567*112233 [Enter]

"Smart Clocking" Keypad Command Examples

Employee Enternet Keyned (Keyheend) *	Keypad/Keyboard: * OUT IN	
Employee Enters at Keypad/Keyboard: *	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.
	CIOCK III NOLE, II SEL	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

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	Nam / * 85 Lack Infe 10
ENTER	Enter Key	Submits job code and/or ID number combinations to the system	7 8 9 - Nome † Pallo Pres
Num Lock	Keypad Lock	Locks and unlocks the keypad	4 5 6 + Heat 1 2 3 Enter
Esc (if present)	Escape	Cancels the current input or exits the current menu	Eod 4 Pedn 0 • Ins Del
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 <a>Job Tracking

Clock-In to a Job

O 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

O 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 <a>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: 2000 [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: 4567 [Enter]

"Explicit Clocking" Keypad Command Examples

Employee Enters at Keyned (Keyheeyd) *		WORK STATUS	
Employee Enters at Keypad/Keyboard: *	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



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 $\underline{\text{Biometric Validation}}$ (keyword "bio") for details.

Magnetic Swipe Badge Reader Overview



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	anan
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.



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 $\underline{\text{Remote Clocking}}$ (keyword "remote") for details.

Telephone Clocking Overview

See the article on $\underline{\mbox{Telephone Clocking}}$ (keyword "phone") for details.



TELEPHONE DIAL-IN

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

See the article on <u>Remote Clocking</u> (keyword "remote") 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.

General Clocking Overview

		Job/Clock Notes	Jobs	Clock In/Out	Validate Employee's Identity
	Keypad/ Keyboard	Type Job/Clock Notes Press <+> key twice	Type Job Code	Press <id></id> key, Type ID Number, Press <enter></enter> key	
	Magnetic Swipe Badge Reader			Swipe Employee ID Badge	
Devices	Barcode Scanner		Scan Job Code Label	Scan Employee ID Badge	
d entification [Proximity Card			Touch Employee Badgeto reader	
ld en	Biometric Reader				Present Thumb
	VOIP (Voice Over IP)	Select option and Record Voice note	Select option and Enter Job Cod e	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 <u>Fair Labor Standards Act</u> 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 Instance of the set of the set

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	All cumulative bug/issue fixes	Limited new features Minor changes to the system Fixes for bugs/issues	Specific major new feature or feature set
Installation Procedure	TimeIPS Support. Schedule a time for the update. Update will process automatically when released and usually takes 1-2	automatically without any intervention. In order to minimize any chance	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 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



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.

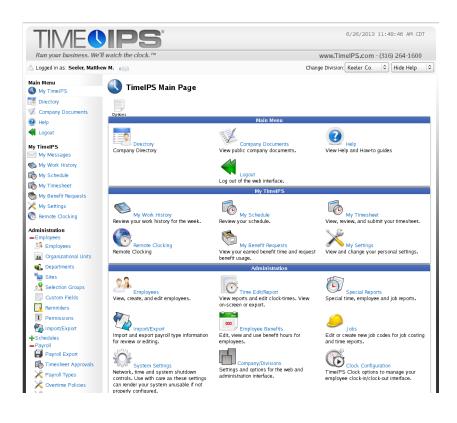
TimeIPS Technical Support provides professional, efficient and friendly service over the phone and via e-mail. As well, our online Knowledge Base with comprehensive information regarding each of the TimeIPS features, including step-by-step instructions for using each, is available, free of charge, 24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

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 VIPSIPS 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

(E)	Мy	Work	History	
-----	----	------	---------	--

		My Work Hi Jun 23, 20					Ę	>
🔺 Day	Clock In Time	Clock Out Time	Department	Job	Work Order	User/Audit Note	Time Worked Fl	ag
 Monday 	06/24/2013 08:13:56 AM CDT	06/24/2013 12:14:04 PM CDT	None	Contract A :: Painting (A024)	None	None	4hrs	
 Monday 	06/24/2013 12:33:31 PM CDT	06/24/2013 05:18:46 PM CDT	None	None	None	None	4hrs, 45 min	
 Tuesday 	06/25/2013 08:05:19 AM CDT	06/25/2013 05:25:22 PM CDT	None	Contract A :: Sheetrock (A01)	None	None	9 hrs, 20 min	
🗉 Wednesday	06/26/2013 07:35:14 AM CDT	06/26/2013 04:44:38 PM CDT	None	Contract A :: Sheetrock (A01)	None	None	9 hrs, 9 min	
							100	0
*						Total T	ime: 27 <i>hrs</i> , 15	<i>m</i>
		В	enefits					ſ
	🔺 Benefit		Day		Dur	ation		
		No Re	sults Found					_
							100	¢
\vee								
		He	olidays					
	🔺 Holiday 🕴	Start End	Duration	Earned		App	oved	
		No Re	sults Found					
							100	\$
								-
								-

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

My Schedule Week of Monday, Jun 24, 2013 This Week (06/24/2013) Day Allowabl minutes In n in ute s Out In Out 3:57 PM 5 7.58 PM 5 5 5:00 PM 5 Monday 5 5 1:00 PM 5 5 8:00 AM 5 12:00 PM 1:00 PM 5:00 PM 5 5 5 Tuesday 5 5 5 5 8:00 AM 5 12:00 PM 5 5 1:00 PM 5 5 5:00 PM 5 Wednesday 5 5 Thursday 8:00 AM 5 12:00 PM 5 1:00 PM 5 5:00 PM 5 5 Friday 5 8:00 AM 5 5 12:00 PM 5 5 1:00 PM 5 5 5:00 PM 5 My Advanced Scheduling Rule You will have 60 minutes deducted from your time at 12:00 PM on all days if you work more than 8 hours.

• 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 <u>Time Adjustments</u> under Schedules in the left pane.

All clock-ins will be rounded to the nearest minute.	
All clock-outs will be rounded to the nearest minute.	
You will have 60 minutes deducted from your time at 12:00 PM on all days if you work more than 8 hours.	
On Clock In between 7:50:00 AM and 8:05:00 AM on all days, the time will be moved to 8:00:00 AM	

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.

Requires a mar	y employee and Red	wires ma								
Requires a mar	y employee and race		nager annr	oval			Not /	Approved by e	mnlovee	
	ager's approval	lanco ma	nager appr	0100				pproval require		
	clocked in. (Hours n	nt include	d in totals)				NO G	pproven require	.u	
Employee still	clocked III. (Hours III	or menuac	a in totals)							
Work week boundaries [disable]						Pay	period bounda	ies (disable)		
enerated on Jun	et for Bor e 26, 2013 at 04:30:	32 PM CI	DT. Time a Ju			07, 2013				
Sunday	Monday		iesday		esday	Thur	sday	Friday		turday
23 June	24 June 04:00:08 -	25 June 08:47:02		26 June 09:09:24	_	27 June		28 June	29 June	1
	Standardtime	Standar		Standardt	ime					
	(Contract A ::	(Contra		(Contract						
	Painting)	Sheetro		Sheetrock						
	04:18:50 -	00:33:0	1 -							
0 June	Standardtime U	02 July		03 July		04 July		05 July	06 July	
o June	of July	or July		os July		o i july		ob July	oo juiy	
7 July	-									
- /										
	orked Time			Benefi					tal Time	
Гуре	Amount		Гуре		Amount		Туре		Amou	
Doubletime	00:00:00		Holiday		00:00:00			ed Time	27:14:5	
Charles and large an	00:59:26		Sick Vacation		00:00:00		TOT	efit Time	00:00:0 27:14:5	
	00.00.00							~L	Z7:14:5	
Overtime Premium Time Standardtime	00:00:00 26:15:24		TOTAL		00:00:00					

• 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 (<u>IPSAPP</u>) is required.

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

Create a Benefit Request

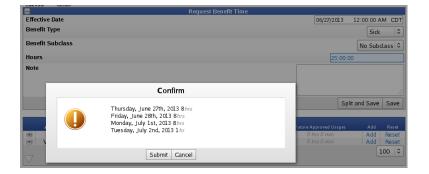
		Request Benefit T	me			
Click on the + :	sign next to Reques	t Benefit Time to expand t	he window.			
a My Benefi	t Requests					
	•					
<u>,</u>						
nefits My Benefit Iendar Details						
fective Date		Request Benefit	Time		06/26/2013 08	00:00 AM CD
nefit Type				Ľ	00/20/2013 08	Sick
nefit Subclass					C	
						No Subclass
ours					00:00:00	
ote						
					Split an	d Save Save
		Current Levels				
▲ Benefit Sick	Current Available 81 hrs 57 min	Net Available 81. hrs 57 min	Future Pending Requ 0 hrs 0 min	ests	Future Appro 0 hrs 0	
Vacation	125 hrs 12 min	125 hrs 12 min	8 hrs 0 min		0 hrs 0	
						100
		Pending Reques			-	
	te Requested 13 04:56 PM	Effective Date 07/05/2013 08:00 AM	Type Vacation	Subclass	Requested 08:00:00	Actions Delete
	013 04:58 PM	06/26/2013 08:00 AM	Sick		04:00:00	Delete
	1					100 \$
, 		Reviewed Reque				

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.

3	Request Benefit Time	
Effective Date		06/27/2013 12:00:00 AM CE
Benefit Type		Sick
Benefit Subclass		No Subclass
Hours		25:00:00
Note		
	Split Request	
		Split and Save Save
	How would you like to split this request?	
		uture Approved Usages Add Rese
		0 hrs 0 min Add Rese
+		
		0 hrs 0 min Add Rese

• 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:

🔀 My Settings	
General System Notifications	
Login IP Verification	Disable IP Verification 🗘
Automatically Refresh Directory Status View And Clocked In Excess Hours Report	Do Not Automatically Refresh 🗘
Show Help by Default	Hide all help 🗘
Show Warnings for Unsaved Changes	Show Warning \$
	Submit

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.

General System Notifications	Dis play Employee List Options		
Send System Notifications to E-Ma	il	Send me System Notifications	•
			Submit

- 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:

General OSystem Notifications	Employee List Options	
Default number of Table Rows		100 \$
Date Format	MM/DD/YYYY (US Standard)	٥
Time Format	09:59 PM (12-hou	AM/PM) 🗘
Duration Format	HH:MM:SS (05:1	5:00) 🗘
Scaled Interface		Scaled \$
Timesheets: Default View	Show most recently fully completed payr	oll period 🗘
Timesheets: Calculate Overtime	🧭 Calcul	ate Overtime
		Submit

- 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:

General System Notifications		
Inactive Employees		Hide 🗘
Active Employees		Show 🗘
Inactive Jobs		Hide 🗘
Active Jobs		Show 🗘
Employee Name Format	Name Only	0
		Submit

• 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.

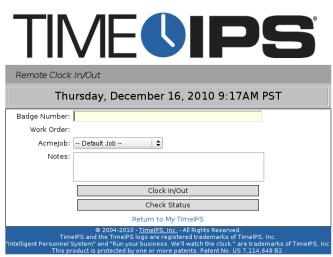
Using the left pane Main Menu, click on: Remote Clocking under My TimeIPS.

-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: <a>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."

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.
 If "Use One-Button Interface" was selected in the <u>Remote Clock Status</u> 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.

TIME	b °
Remote Clock In/Out	
Thursday, December 16, 2010 10:27AM PST	
Username: admin	
Password:	
Work Order:	
Acmejob: Default Job 🛛 🖨	
Notes:	
Clock In Clock Out	
Change Jobs Check Status	
Return to My TimelPS	
© 2004-2010 - <u>TimeIPS, Inc.</u> - All Rights Reserved. TimeIPS and the TimeIPS logo are registered trademarks of TimeIPS, Inc. "Intelligent Personnel System" and "Run your business. We'll watch the clock" are trademarks of T This product is protected by one or more patents. Patent No. US 7,114,648 B2.	melPS, Inc.
The Remote Clock In/Out Screen Using Username and Multi-Button Interface	

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

Employee Status							
	Company formation						
•		Dis	play Options				
Status Controls For: Myself	0			C	eate	None	Celete Set
Global Status Controls:				C	eate	Do Not Disturb	Delete
□ Automatically refresh this page	(change your d	lefault)		Autor	natically	refresh this page	and view fullscree
🔺 Employee	Location	In/Out	Work Order	Job	Status	Last Clock	Clock In Note
backup, backup		New				New	Empty
Boresow, Patty		New				New	Empty
Keeler, Larry		New				New	Empty
Keeler, Matthew M.		New				New	Empty
Lierz, Ken		New				New	Empty
Lierz, Whitney		New				New	Empty
Tatro, Betty		New				New	Empty
Wolf, Hannah		New				New	Empty
		New				New	Empty

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 <u>Employee Status VIew</u> 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 <u>Adding/Removing a Status Message</u> and <u>Using Global Status Message</u> articles.

-			Display Options				
	n/Out	(Organizational Unit Filter		Site Filter		
In or Out 🗘		Administ	ration	Clearwa	ater		$ \land $
In or out v		Contract		Topeka	/ Lawrence		
		Office	013	Wichita	/ Edwichee		11
		Office		Withita			
Filter	oy Manager						
(
No Manager	~						
				~			\sim
			Display				
Set status for	Myself	≎ to	In Meeting		v		
Clabel Status Conte							
Global Status Contr	DIS:		Add Do Not Distur	b 🌣 🛛 Dele	ete		
Automatically re	fresh this page (chan	ae vour default	Autor	natically ref	resh this page and view	v fullscr	een
	nesii tilis page (chan	ge your deladir,	,	1	1.9		
Employee	Location	In/Out Work Order	doL	Status	Last Clock	Clock In	Note
Boresow, Patty s.	User Administration		Contract A :: Sheetrock (A01)		04:44 PM 06/26/2013	Clock III	- Totto
Johnson, Ken	User Administration	In			09:39 AM 06/28/2013		
Lierz, Mitley	User Administration	In			09:39 AM 06/28/2013		
Seeler, Larry	User Administration	In			09:39 AM 06/28/2013		
Seeler, Matthew M.	User Administration	In		In Meeting	09:39 AM 06/28/2013		
Tatro, Betty	User Administration	In			09:39 AM 06/28/2013		
Wolf, Hannah	User Administration	In			09:39 AM 06/28/2013		
Wolf, Jad	User Administration	Out			08:44 PM 05/20/2013		
						100	0

Employee List



Click on the Employee List Icon

		Keeler	Co. Administration		
			mployee List		
🔺 Employee	Extension	Home Phone	Cell Phone	Address	E-Mail
Lierz, Mitley			785-234-4815		mitleyl@keelerco.com
Seeler, Matthew M.					
					100 \$
\bigtriangledown					
		Keele	r Co. Contractors		
		E	mployee List		
🔺 Employee	Extension	Home Phone	Cell Phone	Address	E-Mail
Wolf, Hannah					
Wolf, Jad			785-448-3791		jadw@keelerco.com
					100 \$
∇					
× ·		Ke	eler Co. Office		
			mployee List		
🔺 Employee	Extension	Home Phone	Cell Phone	Address	E-Mail
Boresow, Patty s.			785-522-8984		pattyb@keelerco.com
Johnson, Ken					kenj@keelerco.com
Seeler, Larry			785-689-0235		larrys@keelerco.com
Tatro, Betty			785-245-2254		bettyt@keelerco.com
					100 \$
∇					100 +
V					

• 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	<u>Contact Information</u>	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 <u>Contact tab</u> under Employees section.

Clocked In

Click on the Clocked In Icon								
Currently Clocked In								
Office								
Johnson, Ken None O hours, 10 minutes Location: Admin Section	Seeler, Larry None O hours, 10 minutes Location: Admin Section	Tatro, Betty None O hours , 10 minutes Location: <i>Admin Section</i>						
	Administration							
Lierz, Mitley None O hours, 10 minutes Location: Admin Section	Seeler, Matthew M. None O hours, 10 minutes Location: Admin Section							
Contractors								
Wolf, Hannah None O hours, 10 minutes Location: Admin Section								

• Currently Clocked In Employees are grouped by their Organizational Unit.

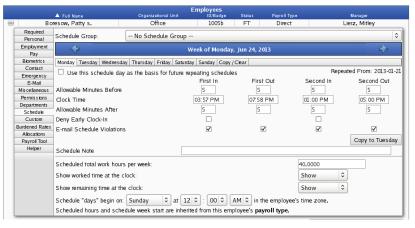
NOTE: If there are more employees clocked in than fit on your screen you can click anywhere in the Currently Clocked In box, which will allow you to scroll up and down within the box.

Clocked In Excess Hours

cess	ick on t	he Clocked In Exco	ess Hours Icon			
Work Order	🔺 Јођ	Employee	Clocked In Excess Hours Mo Location	nitor Hours Worked Day	Hours Worked Week	Hours Remaining Week
			Administration			
None	None	Lierz, Mitley	User Administration	5 hrs, 22 min	5 hrs, 22 min	34hrs, 38min
None	None	Seeler, Matthew M.	User Administration	5 hrs, 22 min	5 hrs, 22 min	34hrs, 38min
			Contractors			
None	None	Wolf, Hannah	User Administration	5 hrs, 22 min	5 hrs, 22 min	34hrs, 38min
			Office			
None	None	Johnson, Ken	User Administration	5 hrs, 22 min	5 hrs, 22 min	34hrs, 38min
None	None	Seeler, Larry	User Administration	5 hrs, 22 min	5 hrs, 22 min	Ohrs
None	None	Tatro, Betty	User Administration	5 hrs, 22 min	5 hrs, 22 min	34hrs, 38min
						100

• 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

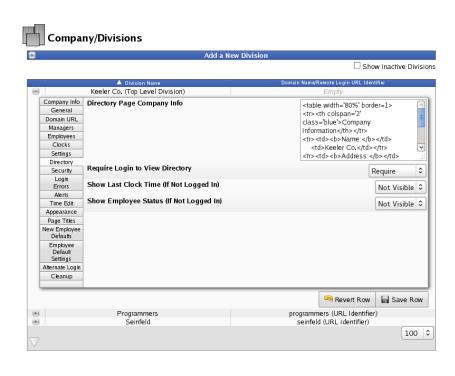


Click on the Company Information Icon

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 <u>HERE</u> 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

Employee Directory							
Empbyce Empbyc Status List	E	cked Ir xcess Hours	Comp Inform				
Display Options							
Set status for	Myself		 	o Unavailab	le	v	
Global Status Controls:				Add Do Not	t Disturb	Delete	
Automatically	refresh this page	(chang	je your o	default) Automat	ically refresh t	his page and viev	v fullscreen
▲ Employee	Location	In/Out	Work Order	Job	Status	Last Clock	Clock In Note
Boresow, Patty s.	User Administration	Out		Contract A :: Sheetrock (A01)	Out to Lunch	04:44 PM 06/26/2013	
Johnson, Ken	User Administration	In				09:39 AM 06/28/2013	
Lierz, Mitley	User Administration	In				09:39 AM 06/28/2013	
Seeler, Larry	User Administration	In				09:39 AM 06/28/2013	
Seeler, Matthew M.	192.168.205.1	In			Unavailable	03:49 PM 07/09/2013	
Tatro, Betty	User Administration	In				09:39 AM 06/28/2013	
Wolf, Hannah	User Administration	In				09:39 AM 06/28/2013	
Wolf, Jad	User Administration	Out				08:44 PM 05/20/2013	
\bigtriangledown							100 🗘

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 <u>Administration >> System >> Company/Divisions >> Directory tab</u>.

- 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

E Display Options							
In/Out	Organizational Unit Filter	Site Filter					
In or Out \$	Administration Contractors Office	~	Clearwater Speka / Lawrence Wichita				
Filter by Manager		~	<u>र</u>				
	Display						

• 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 <u>Global Settings</u> under Site Administration.

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

Status Messages

Display Options							
Set status for	Myself 🗘 to				in la la	ı land	v
\Box Automatically refresh this page (change your default)					A	utomatically refresh this	page and view fullscree
▲ Employee	Location	In/Out	Work Order	Job	Status	Last Clock	Clock In Note
Boresow, Patty s.	192.168.205.1	In			in la la land	03:07 PM 07/10/2013	in late due to doc appt
Johnson, Ken	User Administration	In				09:39 AM 06/28/2013	
Lierz, Mitley	User Administration	In				09:39 AM 06/28/2013	
Seeler, Larry	User Administration	In				09:39 AM 06/28/2013	
Seeler, Matthew M	192.168.205.1	In				03:49 PM 07/09/2013	
Tatro, Betty	User Administration	In				09:39 AM 06/28/2013	
Wolf, Hannah	User Administration	In				09:39 AM 06/28/2013	
\bigtriangledown							100 🗘

• 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 <u>Global Status Controls</u> since they have Global Directory Status permissions. Those with these permissions can also apply them to other employees/admins.

Set status for	Myself 🗘 to	Enter status v
Global Status Controls:	in la la land	Add Do Not Disturb 🗘 Delete
□ Automatically refr	esh this page (change your default)	Automatically refresh this page and view fullscreen

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.

Set status for	Myself 🗘 to	need a break 🗸
Global Status Controls:		Add Do Not Disturb
Automatically refres	h this page (change your default)	Automatically refresh this page and view fullscreen

• 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.

🔺 Employee	Lo catio n	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	
Lierz, Mitley	User Administration	In			09:39 AM 06/28/2013	
Seeler, Larry	User Administration	In			09:39 AM 06/28/2013	
Seeler, Matthew M.	192.168.205.1	In			03:49 PM 07/09/2013	
Tatro, Betty	User Administration	In			09:39 AM 06/28/2013	
Wolf, Hannah	User Administration	In			09:39 AM 06/28/2013	
\bigtriangledown						100 \$

• Employees can view but not edit Clock In Notes.

🔺 Employee	Location	In/Out Work Or	rder 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
\bigtriangledown						100 \$

• Administrators with permission to edit Clock Events, can add and edit Clock In Notes 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.

	Permissions Settings ▲ Permission Group Default Group								
	Division Managers								
	Employee Administrators N								
	Employees								
General Settings	Modify Permissions	Permissions Summary	Employees						
			Permission	tem					
	Can Manage								
	Departments								
	Divisions								

[•] 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.

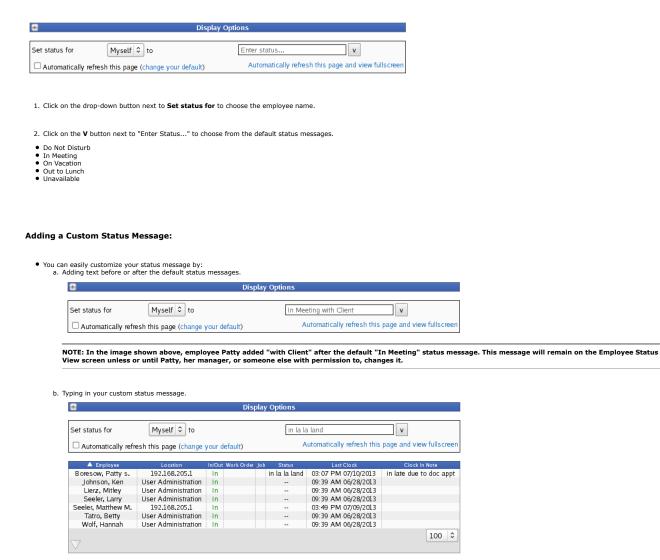
	Miscellaneous								
•	Can Log Into the TimeIPS Web Interfac	e							
•	Company Documents								
•	Directory Employee Listing Directory Last Clock Time								
8	Directory Status								
Director	Directory Status: Allows for making modifications to the Employee Directory.								
	Target Group	Delete	Create	Edit	View				
	For all employees			\checkmark	\checkmark				
	For employees assigned to jobs you manage								
	For employees in divisions you manage								
	For employees in sites you belong to								
	For employees in sites you manage								
	For employees in the organizational unit you belong to								
	For employees that specify you as their manager								
	For employees with your payroll type								
	For employees working on jobs you manage								
	For employees you manage								
	For yourself			\checkmark	\checkmark				
	E-mail Alert Templates								
	Employee Selection Groups								
•	Employee's Personal Settings								
•	Global Directory Status								
•	Time Report Presets								
7									
/									
		🔊 Rever	t Tab	🔒 S	ave Tal				

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

Employ	Employee Directory								
Empbyce Empbyc Status List	E	ocked In Excess Hours	Comp Inform						
•				Display Options					
Set status for	Set status for Myself to Unavailable v								
Global Status Controls:				Add Do Not	: Disturb 🗘	Delete			
Automatically	refresh this page	(chang	e your o	default) Automat	ically refresh	this page and view	v fullscreen		
▲ Employee	Location	In/Out	Work Order	Job	Status	Last Clock	Clock In Note		
Boresow, Patty s.	User Administration	Out		Contract A :: Sheetrock (A01)	Out to Lunch	04:44 PM 06/26/2013			
Johnson, Ken	User Administration	In				09:39 AM 06/28/2013			
Lierz, Mitley	User Administration	In				09:39 AM 06/28/2013			
Seeler, Larry	User Administration	In				09:39 AM 06/28/2013			
Seeler, Matthew M.	192.168.205.1	In			Unavailable	03:49 PM 07/09/2013			
Tatro, Betty	User Administration	In				09:39 AM 06/28/2013			
Wolf, Hannah	User Administration	In				09:39 AM 06/28/2013			
Wolf, Jad	User Administration	Out				08:44 PM 05/20/2013			
\bigtriangledown							100 🗘		

Using a Default Status Message:



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

Removing a Custom Status Message:

Display Options								
Set status for	Myself 🗘 to		I	In Meeting blank in la la land) with Cl	ient	[X]	• and view fullscreen
Employee	Location	In/Out Work Order J	ob Sta	In Meeting wi Do Not Distur			[X]	Clock in Note
Boresow, Patty s.	192.168.205.1	In	In Meeting	In Meeting	0			late due to doc appt
Johnson, Ken	User Administration	In		On Vacation				
Lierz, Mitley	User Administration	In		Out to Lunch				
Seeler, Larry	User Administration	In		Unavailable				
Seeler, Matthew M.	192.168.205.1	In			03:49 P	M 07/09/20	13	1
Tatro, Betty	User Administration	In	-		09:39 A	M 06/28/20	13	
Wolf, Hannah	User Administration	In			09:39 A	M 06/28/20	13	
∇								100 🗘

• 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 <u>Global Status Controls</u> since they have Global Directory Status permissions. Those with these permissions can also apply them to other employees/admins.



Using Global Status Messages

Using the left pane Main Menu, click on: Directory

Employee Status	E	ry Ocked In Excess Hours	Comp Inform				
-							
Set status for	Myself		0	unavailab	le	v	
Global Status Controls:				Add Do Not	Disturb 🗘	Delete	
Automatically	refresh this page	(chang	e your d	default) Automat	ically refresh	this page and view	/ fullscreen
🔺 Employee			Work Order		Status		Clock In Note
Boresow, Patty s.	User Administration	Out		Contract A :: Sheetrock (A01)	Out to Lunch	04:44 PM 06/26/2013	
Johnson, Ken	User Administration	In				09:39 AM 06/28/2013	
Lierz, Mitley	User Administration	In				09:39 AM 06/28/2013	
Seeler, Larry	User Administration	In				09:39 AM 06/28/2013	
Seeler, Matthew M.	192.168.205.1	In			Unavailable	03:49 PM 07/09/2013	
Tatro, Betty	User Administration	In				09:39 AM 06/28/2013	
Wolf, Hannah	User Administration	In				09:39 AM 06/28/2013	
Wolf, Jad	User Administration	Out				08:44 PM 05/20/2013	
							100 \$

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.

Set status for	Myself 🗘 to	Enter status V
Global Status Controls:	in la la land	Add Do Not Disturb 🗘 Delete
Automatically refres	h this page (change your default)	Automatically refresh this page and view fullscreer

• 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.

Set status for	Myself 🗘 to		v
Global Status Controls:		Add in la la land	- Delete
□ Automatically refree	sh this page (change your default)	Automatically refre	sh this page and view fullscreen

• 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 <u>Adding/Removing Status Messages</u>.



Company Documents

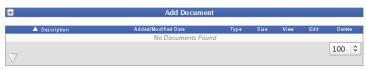
TimeIPS can store company documents for employee access. Users with "Company Documents" permissions can create, edit, and remove company documents. Employees have view only access.

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

SEE . 실 Company Documents

	A	dd Document		
Description	Added/Modified Date	Туре	Size	View Edit Delete
Data Sheet	07/11/2013 02:58:59 PM	application/vnd.oasis.op	2.4MB	R 🗾 🗙
Job Descriptions	07/11/2013 03:18:47 PM	application/vnd.oasis.op	513.9KB	S. 🔎 🗙
\bigtriangledown				100 \$

To Add a Company Document



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

	Add Document
Description	Data Sheet
File	ts/IPS120T_Datasheet.odg Browse
Make Public	\checkmark
	Add 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

- To View, click on the magnifying glass icon S.
 The document opens based on the document's file format.

To Edit a Company Document

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

		Edit Document
Title:	Data Sheet	
Make Public:	\checkmark	
		Apply Cancel

Adjust the information as necessary.
 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.

 To Delete, click on the red X icon A confirmation page displays. 	κ.		

	Ques	tion	
Are you sure you wish to delete this document?			
	Yes	No	

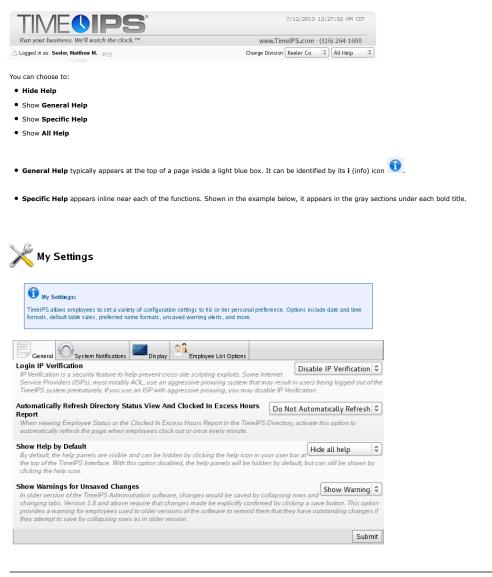
3. Click on \boldsymbol{Yes} to remove the document or \boldsymbol{No} to leave the page without removing the document.

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.



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.

TIME	PS [®] digital time clock & attendance systems	Sales Support
	Knowledge Base Sea	rch:
Main Menu • <u>Home</u> • <u>My Account</u>	TimeIPS Knowledge Base Table of Contents: Version 1.11 View Articl	e Index
<u>Administration</u> <u>Add News</u> <u>Logout</u>	Ask a Question:	Search
 Table of Contents Article index Downloads New Features EAQ News Web Links 	Version 1.11 Table of Contents	Print

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 **<u>Table of Contents</u>** 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 <u>New Features</u> 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.

O The <u>Web Links</u> 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.

🚺 TimelP	S Main Page			
You ha	ave been logged out.			
		Login		
	Division			
	Username			
	Password			
			Remember Me	
		Login		
		Login		

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

💥 My Settings			
General System Notifications			
Login IP Verification	(Disable IP Verification	0
Automatically Refresh Directory Status View And Clocked In Excess Hours Report	Do Not	: Automatically Refresh	٥
Show Help by Default		Hide all help	٥
Show Warnings for Unsaved Changes		Show Warning	٢
		Subr	nit

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

Select an employ	nd Display Options se's presers for this page: Matthew M. (c) set Selected (c) et Delete Preset	
Limit Selection by group: Full Visible Employees In Keeler Co. Full Organizational Unit D/Badge Employment D/Badge Sineet Address Show inactive Employees: Employees	Available Columns First Name Middle Name Last Name Employment Status Street Address Address Line 1 Address Line 2 Display	Displayed Columns Full Name 1D/Badge Manager Organizational Unit Payroll Type Status U

- 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 litems 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.

👊 Employee Administration



			Employees			
	🔺 Full Name	Organizational Unit	ID/Badge	Status	Payroll Type	Manager
)	Boresow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
)	Johnson, Ken	Office	1004	FT	Direct	Lierz, Mitley
	Lierz, Mitley	Administration	1001	FT	Direct	Not Set
	Seeler, Larry	Office	1003	FT	Direct	Seeler, Matthew M.
	Seeler, Matthew M.	Administration	1000	FT	Direct	Not Set
	Tatro, Betty	Office	1002	FT	Direct	Seeler, Matthew M.
	Wolf, Hannah	Contractors	1007	FT	Direct	Lierz, Mitley
	Wolf, Iad	Contractors	1006	FT	Direct	Seeler, Matthew M.

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 <u>Funployee Import/Export optional module</u>.

Required tab

	🔺 Full Name	Organizational Unit	Employees ID/Badge	Status	Payroll Type		Manager
В	oresow, Patty s.	Office	1005b	FT	Direct		Lierz, Mitley
Required	"First Name:	Patty		Last Name:	Boresow		
Personal	ID / Badge:	1005b			Suggest ID/Ba	adae Ni	umber
Employment	10 / Dauge.	10050			Buggestib/bt		iniber
Pay	Payroll Type:	Direct				0	
Biometrics						0	í
Contact	Organizational Unit:	Office				~	J
Emergency	Default Department:	Family				0	
E-Mail		· · ·	1				J
Mis cellaneous	Start Date:	11/17/2011		Employed:	Yes (Change))	
Permis sions	Status:	FT					
Departments							
Schedule							
Custom							
Burdened Rates							
Allocations							
Payroll Tool							
Helper							

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

Personal tab

			Employ						
	🔺 Full Name	Organizational Unit		D/Badge	Status		oll Type	Manaj	
B	oresow, Patty s.	Office	1	1005b	FT	D	irect	Lierz, N	litley
Required	First Name:	Patty			Last Name:		Bon	2SOW]
Personal	Middle Name/Initial:	sue.bobby			Preferred N	amo:			
Employment		sue.bobby				ane.			
Pay	SSN:				Birthday:				
Biometrics	Time Zone:				Company	Time Zo	one	0	
Contact									
Emergency	Edit Photo								
E-Mail	Username:								
Mis cellaneous	Password:				Verify Pass	word:			
Permis sions	PIN Number:				, Require PIN		For	e Re-Registration: 🗆	1
Departments					Require PTN	. 🖭	Ford	e Re-Registration. 🗆	
Schedule	Login as this Employee								
Custom									
Burdened Rates									
Allocations									
Payroll Tool									
Helper									
	1								

- 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 <u>Telephone Clocking</u>. 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.

	🔺 Full Name	Organizational Unit	mployees ID/Badge	Status	Payroll Typ		Manager
Bo	presow, Patty s.	Office	1005b	FT	Direct	-	Lierz, Mitley
Required Personal Employment Pay	First Name: Middle Name/Initial: SSN:	Patty sue.bobby		Last Name: Preferred Nam Birthday:	e:	Boresow	
Biometrics	Time Zone:			Company Tir	me Zone		0
Emergency E-Mail	Hide Photo Username:						
Mis cellaneous Permis sions Departments Schedule	Password: PIN Number: Login as this Employee			Verify Passwo Require PIN: [Force Re-Reg	gistration:
Custom Burdened Rates Allocations							
Payroll Tool Helper	?	Upload n Upload N		Brows Delete Current			

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.

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

	🔺 Full Name	Em Organizational Unit	ployees ID/Badge	Status	Payroll Typ	e Manag	er
e Bo	oresow, Patty s.	Office	1005b	FT	Direct	Lierz, M	
Required Personal Employment Pay Biometrics Contact Emergency E-Mail Mis cellaneous	First Name: Middle Name/Initial: SSN: Time Zone: Hide Photo Username:	Patty sue.bobby		Last Name: Preferred Nam Birthday: Company Tir	me Zone	B oresow	
Permissions Departments Schedule	Password: PIN Number: Login as this Employee			Verify Passwo Require PIN:		Force Re-Registration:	
Custom Burdened Rates Allocations Payroll Tool Helper	Star Star	Upload new Upload New		Brows			 ■

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

			Employees		
	🔺 Full Name	Organizational Unit	ID/Badge Status	Payroll Type	Manager
Bo	oresow, Patty s.	Office	1005b FT	Direct	Lierz, Mitley
Required	Title/Position:	Sr. Buyer	Manager:	Lierz, Mitley	0
Personal	The/Fosition.	Si. Buyer	Manager.	LIETZ, MILLEY	•
Employment	Payroll Type:	Direct			0
Pay					
Biometrics	Holiday Group:	Salary			\$
Contact		log:			
Emergency	Organizational Unit:	Office			0
E-Mail	Default Department:	Family			0
Mis cellaneous	Delaut Department.	Ганицу			•
Permis sions	Default Job:	None			0
Departments	-				
Schedule	ID / Badge:	1005b	Alternate Number:		
Custom	Start Date:	11/17/2011	Employed:	Yes (Change)	
Burdened Rates	Workweek Group:	Direct (Edit)			
Allocations	Status:	FT	View/Add Changes:	Title Employment	Status Pay Other
Payroll Tool					
Helper	Delete:	Disabled	Print Badge	Suggest ID/Badge	Number

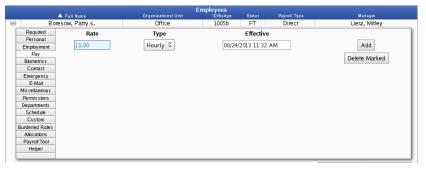
- (Optional) Enter the employee's title in the Title/Position field.
 All employees with the Manager Administrative Privilege are listed in the Manager drop-down menu. Select the employee's manager from the list.

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.

- Payroll Type.
 Holiday Groups are used to assign employees different sets of holiday rules.
 TimetPS 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 is the inserting the clocked whon 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 here. (The IPSIPS optional module is convired to the problement of the Management is the money option of the planet planet.)
- If you have been set by, employees can be assigned a Default you, whenever the employee scale shows a without specifying a job, they win advantation be docked into the job selected here. (The IPSIPS optical module is required for Job Management.) The employees 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 <u>Quick Books Integration with Benefits Tracking</u> optional module for
- If their's uses the start back to decomme back to
- 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.

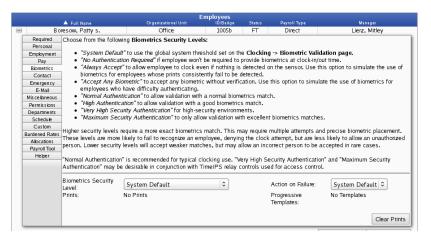
Pay tab



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

			nployees			
	🔺 Full Name	Organizational Unit	ID/Badge Status	Payroll Type	Manager	
B	oresow, Patty s.	Office	1005b FT	Direct	Lierz, Mitley	
Required	Address 1:				Publicly Viewable:	
Personal						
Employment	Address 2:					- 1
Pay	City:	State:	ZIP / Postal	Code:		- 1
Biometrics	Home Phone:				Publicly Viewable:	
Contact						
Emergency	Cell Phone:				Publicly Viewable:	
E-Mail	Office Phone Extension:					- 1
Mis cellaneous						- 1
Permissions						- 1
Departments						- 1
Schedule						- 1
Custom						- 1
Burdened Rates						- 1
Allocations						- 1
Payroll Tool						- 1
Helper						- 1

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

Emergency tab

				Empioyees			
	🔺 Full Name		Organizational Unit	ID/Badge	Status	Payroll Type	Manager
=) В	oresow, Patty s.		Office	1005b	FT	Direct	Lierz, Mitley
Required	Emeranda Canta	at 1 Ema	ergency Contact 2]
Personal	Emergency Conta	CUT Eme	ergency Contact 2				
Employment						-	
Pay	Name:					Phone	6
Biometrics	Address 1:						
Contact	Address 2:						
Emergency							
E-Mail	City:			State:		ZIP / Postal Code:	
Mis cellaneous	Clear Informat	ion	opy From This Employee				Publicly viewable:
Permis sions	Cica moma		opy from this Employee				Publicity viewable.
Departments							
Schedule							
Custom							
Burdened Rates							
Allocations							
Payroll Tool							
Helper							

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

			Emplo								
	🔺 Full Name	Organizational Unit		D/Badge	Status	P	syroll Type			Manager	
Bo	oresow, Patty s.	Office		1005b	FT		Direct		Lie	rz, Mitley	
Required	E Mail Sottings Direct Mail	End-of-Week Report Settings	Schodub	Tomplator							
Personal	L-mail Settings Direct Mail	Linu-on-week Report Settings				1					_
Employment			Static	E-mail co	onngura	uon.					
Pay		Should this employee rec	eive E-ma	ail messa	aes. Inte	mal mes	sages, or	both?	Both		0
Biometrics		Should this employee ree		an messa				boun. (
Contact	E-mail	Address	Default	HTML	Each	Clock	End of	Overtin	ne Schedule ^S	Schedule	Clock
Emergency			E-mail		Clock	Errors	Week			Alert	Note
E-Mail			0	\checkmark							
Mis cellaneous			0	\checkmark							
Permis sions			~	2	_	_				_	
Departments			0	V							
Schedule	No E-mail / Private E-m	nail:	۲								
Custom											
Burdened Rates	Overtime Limit:	Overtime Alert In	terval:		Overti	me Temp	late:			Show	v Errors:
Allocations	15 minutes 🗘	5 minutes 💲			Use	default t	emplate	0			
Payroll Tool	15 minutes V	5 minutes 🔍			USE	uerauter	emptate	*			
Helper											

- 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 <u>End of Week reports in HTML</u>, or leave the checkbox unchecked to generate a <u>text version of the End of Week report</u>.
 Check the **Each** Clock checkbox to e-mail a notification to the corresponding e-mail address of every clock event error. A Clock Error scheckbox 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 <u>Payroll Integration with Benefits Tracking</u> 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 ither 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 <u>IPSIPS</u> optional module is required to enter an employee's work week 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

	▲ Full Name	Organization	Emplo I Unit II	<mark>yees</mark> D/Badge Statu	s Payroll Type		Manager
Bo	resow, Patty s.	Office		1005b FT	Direct		erz, Mitley
Required Personal	E-Mail Settings Direct Ma	il End-of-Week Report	Settings Schedule "	Femplates			
Employment	Martin Construction of the			Message Recipi			
Pay	Many system notices an The Direct Message Re						
Biometrics Contact	Default E-mail Address		yee or employee	group. If no defau	lt E-mail address is	configured, messages	will be delievered to
Emergency	the employee's internal	mailbox.					
E-Mail							Add Recipient
Mis cellaneous	Each Clock	Clock Errors	End of Week	Overtime	Schedule	Schedule Alert	Clock Note
Permissions	Copy these settings t	:0					
Departments Schedule	🔍 All Visible Emplo	yees In Keeler Co.	٥				
Custom							
Burdened Rates							
Allocations							
Payroll Tool							
Helper							

• 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

			mployees			
	🔺 Full Name	Organizational Unit	ID/Badge	Status	Payroll Type	Manager
Bo	resow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required	C Mall Carlings Discontinue	End-of-Week Report Settings Sch	adula Tamatatan			
Personal	E-Mail Settings Direct Mail			-		
Employment		Check	boxes to hide l	penefits on	i report	
Pay	Sick					Vacation
Biometrics	Email template to use:	Use default template 🗘				
Contact	Email template to use.	Ose defautt temptate 🗸				
Emergency						
E-Mail						
Mis cellaneous						
Permissions						
Departments						
Schedule						
Custom						
Burdened Rates						
Allocations						
Payroll Tool						
Helper						

(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

	▲ Full Name	Emp Drganizational Unit	loyees	s Status	Payroll Type	Manager
Bo	resow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required Personal	E-Mail Settings Direct Mail End-of-W	eek Report Settings Schedu	le Templat	es		
Employment	Minimum Break	Use default template	•			
Pay Biometrics	Deny Clock	Use default template	•	Clock Erro	or	Use default template 🗘
Contact Emergency	Each Clock In/Out	Use default template	•	Clock In/C	Out with Warning	Use default template 🗘
E-Mail Mis cellaneous	Automatic Clock In	Use default template		Automatic	Clock Out	Use default template 🗘
Permis sions	Automatic Job Change	Use default template		Clock Not		Use default template 🗘
Departments Schedule	5 5					
Custom Burdened Rates	Missed Time In	Use default template	: ♀	Missed Ti	me Out	Use default template 🗘
Allocations						
Payroll Tool Helper						

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

Miscellaneous tab

Notes

			mployees			
	🔺 Full Name	Organizational Unit	ID/Badge	Status	Payroll Type	Manager
e Bo	resow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required	I					
· · · · · · · · · · · · · · · · · · ·	Notes Documents External	Resources Demographics Hir	e Notes Clock Me	ssage		
Personal			1.00.77.1.1			
Employment	Equipment List:	Extension ladder, Cordles	s drill, Table sav	,		
Pay	View Changes					
Biometrics	view changes					
Contact		Company Truck				
Emergency	Physical Keys:	company mack				
E-Mail	View Changes					
Mis cellaneous						
Permissions	Alarm Access:	none				
Departments	View Changes					
Schedule	view changes					
Custom						
Burdened Rates	Notes:					
Allocations	Notes.					
Payroll Tool						
Helper	Last Review:	06/24/2013				

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

▲ Full Name esow, Patty s.	Organizational Unit Office	ID/Badge	Status	Payroll Type	Manager
esow, Patty s.	Office				
	Once	1005b	FT	Direct	Lierz, Mitley
Notes Documents Extern	al Pesources Demographics	Hire Notes Clock Mer	5308		
Noies Bocuments Extern		The Holes Clock Me.			
Summer Volunteer Date	s	Jun 24	1,2013	207.0B	V -
Description:		🗆 Make I	Public		
File:		Brows	se		
			Add Docum	nent	
	Summer Volunteer Date Description:	Title Summer Volunteer Dates Description:	Title Jun 24 Description: Image: Construction of the second seco	Title Date Summer Volunteer Dates Jun 24, 2013 Description: 	Title Date Size Summer Volunteer Dates Jun 24, 2013 207.08 Description: Make Public

- Click on the **Documents** tab to attach documents associated with the employee.
 Click the **Browse** button and navigate to the document.
 Enter identifying information about the document in the **Description** field and click on the **Add Document** button.
 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

							Empl	oyees			
			ull Name		Organization			ID/Badge	Status	Payroll Type	 Manager
		Boresow	w, Patty s.		Office	1		1005b	FT	Direct	Lierz, Mitley
1	Required	Marrie	D	External Resources	D	1 Percenter					
- 6	Personal	Notes	Documents	External Resources	Demographics	Hire Notes	CIDCK M	essage			
- 1	Employment	401k	Account								http://yourfinancialwebsite.com
- 1	Pay	——									
- 1	Biometrics										
- 1	Contact	1									
- 1	Emergency	1									
- 0	E-Mail										
- 1	Mis cellaneous										
- 0	Permis sions										
- 1	Departments]									
- 1	Schedule	1									
- 1	Custom	1									
- 6	Burdened Rates	1									
- 0	Allocations										
- 6	Payroll Tool	1									
- [Helper										
1											
_											

• 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

			Employees			
-	🔺 Full Name	Organizational Unit	ID/Badge	Status	Payroll Type	Manager
Bo	resow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required	Notes Documents Externa	al Resources Demographics	Hire Notes Clock Me			
Personal	Notes Documents Externa		The Notes Clock Me	essage		
Employment	Gender:	Male				<u> </u>
Pay						
Biometrics	U.S. Citizen:	Yes				<u> </u>
Contact	Ethnicity:	Native Llawaii	ian/Pacific Islander			•
Emergency	Eunicity.	INALIVE Havval	ian/ Facilité Istander			
E-Mail	Marital Status:	Single				-
Mis cellaneous						
Permissions	Disabled:	No				<u>-</u>
Departments						
Schedule	Military:	None				<u> </u>
Custom						
Burdened Rates						
Allocations						
Payroll Tool						
Helper						

• 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

	🔺 Full Name	Org	anizational Unit	ID/Badge	Status	Payroll Type	Manager
Bo	oresow, Patty s.		Office	1005b	FT	Direct	Lierz, Mitley
Required Personal	Notes Documents E	xternal Resources	Demographics	Hire Notes Clock Me	essage		
Employment	1						
Pay	Hire Notes:						
Biometrics	1						
Contact							
Emergency	Release Notes:						
E-Mail	nelease notes.						
Mis cellaneous							
Permis sions]						
Departments	1						
Schedule	1						
Custom	1						
Burdened Rates	1						
Allocations							
Payroll Tool	1						
Helper	1						

• 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

	▲ Full Name	Organizational		0yees ID/Badge	Status	Payroll Type	Manager
Bo	oresow, Patty s.	Office		1005b	FT	Direct	Lierz, Mitley
Required	Notes Documents Extern	Demon	aphics Hire Note	Cleak Max			
Personal	Notes Documents Extern	ai Resources Demogra	apriles Hire Note	S CIDER Mes	sage		
Employment							11.5
Pay	This message will b	e seen every time th	iis employee cl	ocks in or c	out. Clear	the message to dis	sable it.
Biometrics							1.1.1
Contact	Clocks are limited to	o displaying three lin	es of 18 charac	ters. For be	est results	, keep this messa	ge briet.
Emergency							
E-Mail							
Mis cellaneous	It's a new day!						
Permis sions	You've got this, Patty!!						
Departments							
Schedule							
Custom							
Burdened Rates							
Allocations							
Payroll Tool							
Helper							

• 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

	🔺 Full Name	E Organizational Unit	mployees ID/Badge	Status	Payroll Type	Manager
Bo	resow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required Personal Employment	Set a username and pas or more permission group		llow this emplo	yee to log in	to TimeIPS. To	grant additional access, select one
Pay	Division Managers	Employ	ee Administrat	ors		Employees
Biometrics Contact	Full Access	🗆 Job Ad	ministrators			Job Managers
Emergency E-Mail	Managers	🗆 Organi.	zational Unit Ad		Payroll Administrators	
Mis cellaneous Permis s ions	Piecework Administ	rators 🗌 Site M	anagers		Site Supervisors	
Departments	🗌 🗆 System Administrat	ors				
Schedule						
Custom						
Burdened Rates						
Allocations						
Payroll Tool						
Helper						

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.

TimeIPS :: Time Clock, Attendance and Payroll So...

Departments tab

	🔺 Full Name	Organizational Unit	Employees ID/Badge	Status	Payroll Type	Manager			
Bo	oresow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley			
Required	Availab	le Departments	ents Current Membership						
Personal	Administrat	ion 🔄			Family				
Employment	Friends				runney				
Pay	Friends								
Biometrics									
Contact	1		-	2					
Emergency	1			7					
E-Mail	1								
Mis cellaneous	1								
Permis sions	1								
Departments		<u> </u>				\leq			
Schedule	An Employee's Departm	ont Momborship controls	which Donartmo	nte are avai	able for the employee	to choose from when making			
Custom		ng piecework, or inserting ti		ins are avail	able for the employee	to choose non when making			
Burdened Rates		removed from his or her de		t on this tak					
Allocations	An employee can not be	removed from his of her de	naun Depanmen	it on this lat					
Payroll Tool									
Helper	1								

• 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.

TimeIPS :: Time Clock, Attendance and Payroll So...

Schedule tab

	Full Name	Organizational Unit	Employees	Status Payroll	Tune	Manager
Bo	resow, Patty s.	Office	1005b	FT Dire		Lierz, Mitley
Required	icountracty 51	Ginee	10050	TT : Dire		
Personal	Schedule Group:	No Schedule Gro	qu			0
Employment	4		and the families	1		
Pay			Week of Monday,	Jun 24, 2013		7
Biometrics	Monday Tuesday Wednesd	ay Thursday Friday Sa	turday Sunday Copy / C	Elear		
Contact					Rene	ated From: 2013-01-21
Emergency	Use this schedule day	y as the basis for futur				
E-Mail			First In	First Out	Second In	Second Out
Mis cellaneous	Allowable Minutes Before		5	5	5	5
Permis sions	Clock Time		03:57 PM	07:58 PM	01:00 PM	05:00 PM
Departments	Allowable Minutes After		5	5	5	5
Schedule			2	2	2	2
Custom	Deny Early Clock-In					
Burdened Rates	E-mail Schedule Violation	s	\checkmark	\checkmark	\checkmark	\checkmark
Allocations						
Payroll Tool						Copy to Tuesday
Helper	Schedule Note					
	Scheduled total work hour	s per week:			40.0000	
	Show worked time at the	lock:			Show	
	Show remaining time at th	e clock:			Show	
	Schedule "days" begin on	Sunday 🗘 at	12 0 : 00 0 A	M 🗘 in the employ	yee's time zone.	
	Scheduled hours and sche	edule week start are in	nerited from this empl	ovee's payroll type		

- 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 their schedule).
- 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

		l.	Employees			
	🔺 Full Name	Organizational Unit	IĎ/Badge	Status	Payroll Type	Manager
Bo	resow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required	Theorem Construction				to the terms of the	
Personal	There are no Custom E	Employee Fields that have b	een configurea,	or that are v	isible to you.	
Employment						
Pay						
Biometrics						
Contact						
Emergency						
E-Mail						
Mis cellaneous						
Permis s ions						
Departments						
Schedule						
Custom						
Burdened Rates						
Allocations						
Payroll Tool						
Helper						

- 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.

				Empl	oyees					
	🔺 Full Name		Organizational Unit		ID/Badge	S1	atus	Payroll Ty	pe	Manager
-	Boresow, Patty s.		Office		1005b	1	-T	Direct		Lierz, Mitley
Required	Sales Region	3			Comme	ercial D)river		N00528080	
Personal	5									
Employment										
Pay										
Biometrics										
Contact										
Emergency										
E-Mail	-									
Mis cellaneous										
Permissions										
Departments										
Schedule										
Custom										
Burdened Rate	s									
Allocations	-									
Payroll Tool	-									
Helper	-									

• 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

			Employees			
	🔺 Full Name	Organizational Unit	ID/Badge	Status	Payroll Type	Manager
Bo	oresow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required			Burdened	Rates		
Personal	Pay Type		Durachea	Rates		
Employment	Standardtime					
Pay	Overtime					
Biometrics	Doubletime					
Contact	Premium Time					
Emergency	Holiday					
E-Mail	Sick					
Mis cellaneous	Vacation					
Permissions	vacation					Here for a second second second
Departments	1				Add a N	lew "Effective at Hours" Limit
Schedule	1					
Custom	1					
Burdened Rates	-					
Allocations]					
Payroll Tool	1					
Helper	1					
	1					

- The Burdened Rates tab allows you to track the the actual cost for employee's time in comparison 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 burdemed rate level for an employee who has worked a larger number of hours.

NOTE: This feature requires the IPSBRD module.

				Employees						
		🔺 Full Name	Organizational Unit	ID/Badge	Status	: Payroll T	'ype Manager			
- (+)		Boresow, Patty s.	Office	1005b	FT	Direc	t Lierz, Mitley			
		Johnson, Ken	Office	1004	FT	Direc	t Lierz, Mitley			
	Required			Burdened Rates						
	Personal		At 0hrs	Durden		00hrs	At 1000hrs	_		
- 6	Employment	Рау Туре	(Remove)			nove)	(Remove)			
	Pay	Standardtime	1.5		.4	1010)	1.3	— I		
	Biometrics									
	Contact	Overtime	1.4	,	4		1.3			
	Emergency	Doubletime	1.3		.3		1.3			
	E-Mail	Premium Time	1.3		3		1.3	- 1		
	Mis cellaneous	Holiday	1				1			
	Permissions	Sick	1		-		1			
	Departments		1				1			
	Schedule	Vacation	1	l			1			
	Custom						Add a New "Effective at Hours"	Limit		
6	Surdened Rates									
	Allocations									
	Payroll Tool									
	Helper									
								_		

Here is an example of the Burdened Rates specified.

Allocations tab

		🔺 Fuli Name	Organizatio	Emp	loyees ID/Badge	Status	Payroll Type	Manager
-		Boresow, Patty s.	Offic		1005b	FT	Direct	Lierz, Mitley
F	Required Personal							Add Allocation
	Employment	Code		Amount			Note	
	Pay Biometrics	300]	25			admin overh	ead 🗶
	Contact	500		50			research	×
	Emergency E-Mail	200		25			training	×
	Mis cellaneous	-						
	Permis sions Departments	-						
	Schedule	-						
	Custom Burdened Rates	-						
	Allocations Payroll Tool	-						
	Helper							
I,								

• 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

	🔺 Full Name	Organizational Unit	ID/Badge	Status	Payroll Type	Manager		
B	oresow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley		
Required		Payroll Exports Including This Employee						
Personal	Export Start	Export End P	repared On	Prepared By	y Comment	Export Status	Link	
Employment		This Employee	e Has Not Been Inc	luded In Any	Payroll Exports			
Pay							100 0	
Biometrics								
Contact								
Emergency								
E-Mail								
Mis cellaneous								
Permis sions								
Departments								
Schedule								
Custom								
Burdened Rates								
Allocations								
Payroll Tool								
Helper								

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

Helper tab

	🔺 Full Name	E Organizational Unit	Employees ID/Badge	Status	Payroll Type	Manager
Bo	resow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Required Personal		Copy this information:			To these en	nployees:
Employment Pay Biometrics Contact Emergency E-Mail Mis cellaneous Permis s ions	Address Time Zone Require PIN Register PIN Title/Position Manager Payroll Type		=	Johnson, Ke Lierz, Mitley Seeler, Larr Seeler, Mat Tatro, Bett Wolf, Hann Wolf, Jad	y y thew y	
Departments Schedule Custom Burdened Rates Allocations Payroll Tool Helper	Holiday Group		Cop	у		

• 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.

🗣 Add New	Employee		
	Ad	ld New Employee	
First Name:		Last Name:	
ID / Badge:	1008	Start Date:	06/14/2013
Organizational Unit:	Administration 🗘	Work Week Group:	Direct 🗘
Payroll Type:	Direct 🗘	Default Department: Optional	No Department ≎
Pay Type:	Hourly 2	Default Job: Optional	None 🗘
Shift:	None 🗘	Manager: Optional	None \$
Employed:	Yes 🗘	Add A	ccrual Schedule
Add to Sites:	Clearwater Topeka / Lawrence Wichita		
	C	Create Employee	

Click on the Add New Employee icon at the top of the page.
 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 "Houry".
 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 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 rebire or not.

- rehire or not.

- O Select the Add Accrual Schedule to set the start date and group.
 O 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 architecture that the Description Interview. 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.

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

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

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.

			loyees				
	Full Name)/Badge	Status	Payroll Type	Manager	
Back	tup, Joey	Family	1008	Not Set	Direct	Not Set	
Required	First Name:	Joey	1	Last Name:	Backup		
Personal		- /	-	East Hearine.			
Employment	ID / Badge:	1008			Suggest ID/Badge N	umber	
Pay	Payroll Type:	Direct					0
Biometrics							<u> </u>
Contact	Organizational Unit:	Family					0
Emergency	Default Department:	No Department					0
E-Mail		· · · · · · · · · · · · · · · · · · ·	-				¥
Mis cellaneous	Start Date:	01/01/1970		Employed:	Yes (Change)		
Permis sions	Status:						
Departments							
Schedule							
Custom							
Burdened Rates							
Allocations							
Payroll Tool							
Helper	_						
					Revert Row	/ 🔒 Sav	e Row

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

	Employment Status	
Employe	d: Yes	•
	Update Employment Status Cancel	

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".
 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.

	Add a New	Division
		Show Inactive Di
	Division Name	Domain Name/Remote Login URL Identifier
	Keeler Co. (Top Level Division)	Empty
Company Info	Terminate Inactive Employees After Days	30
General	Don't Terminate Emplo	oyees In The Following Groups
Domain URL Managers	🗹 Full Access	Managers
Employees		
Clocks	Employee Administrators	System Administrators
Settings	Payroll Administrators	Division Managers
Directory		
Security	Employees	Site Managers
Login Errors	🗌 Job Managers	Site Supervisors
Alerts	Department Administrators	Piecework Administrators
Time Edit		
Appearance		
Page Titles		
New Employee Defaults		
Employee		
Default Settings		
Alternate Login		
Cleanup		

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.

Select an employ	and Display Options ree's presets for this page: r, Matthew M. (0) rset Selected - (0) set Delete Preset	
Limit Selection by group:	Available Columns First Name Image: Columns Middle Name Image: Columns Last Name Image: Columns Preferred Name Image: Columns Employment Status Street Address Street Address Line 1 Address Line 2 Address Line 2 Vertice	Full Name Full Name ID/Badge Manager Organizational Unit Payroll Type Status C

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

A F	-ull Name	Organizational Unit	Employees ID/Badge	Status	Payroll Type		Manager
Back	up, Joey	Family		Vot Set	Direct		Not Set
Required Personal	Title/Position:		Manager:	Non	e	0	
Employment Pay	Payroll Type:	Direct					0
Biometrics	Holiday Group:	None					•
Contact Emergency E-Mail	Organizational Unit:	Family					0
Mis cellaneous	Default Department:	No Department					\$
Permissions Departments	Default Job:	None					0
Schedule Custom Burdened Rates	ID / Badge:	1008	Alternate Number:				
Allocations Payroll Tool	Start Date:	01/01/1970	Employed:		tically termi ated on 07/2.		tivity (Change)
Helper	Workweek Group:	Not currently in a work	week group. (E	dit)			
	Status:		View/Add Changes:	Title E	mployment	Status Pay	Other
	Delete:	Disabled	Print Badg	e Sugge	st ID/Badge	Number	
					5	Revert Row	🔒 Save Row

On the Required or Employment tab, click "change" to the right of the Employed status. (In this example, it says "Automatically terminated for inactivity".
 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.

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.

			ployees						
	🔺 Full Name	Organizational Unit	t	ID/Badge	Status	Payroll Type	Manager		
	Befired, Boundto	Administration		1009	FT	Direct	Not Set		
Required	Title/Position:		Manage	ar:	None	0			
Personal									
Employment	Payroll Type:	Direct	Direct						
Pay							0		
Biometrics	Holiday Group:	None	None						
Contact							0		
Emergency	Organizational Unit:	Administration	Administration						
E-Mail									
Mis cellaneous	Default Department:	No Department	0						
Permis sions	Default Job:	None	0						
Departments	Dereating 500.	line			-				
Schedule	ID / Badge:	1009	Alternat	e Number:					
Custom	Start Date:	07/22/2013	Employ	ed:	Yes (Char	nge)			
Burdened Rates	Workweek Group:	Direct (Edit)							
Allocations									
Payroll Tool	Status:	FT	View/A	dd Changes:	Title Em	ployment Statu	s Pay Other		
Helper	Delete:	Delete Employee		Print Badge	Suggest	ID/Badge Numb	er		
						🔊 Revert Row	🔒 Save Row		

Click on the Employment tab.
 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.



	Search	and Display Oj	otions		
▲ Full Name	E Organizational Unit	Employees ID/Badge	Status	Payroll Type	Manager
Boresow, Patty s.	Office	1005b	FT	Direct	Lierz, Mitley
Johnson, Ken	Office	1004	FT	Direct	Lierz, Mitley
Lierz, Mitley	Administration	1001	FT	Direct	Not Set
Seeler, Larry	Office	1003	FT	Direct	Seeler, Matthew M.
Seeler, Matthew M.	Administration	1000	FT	Direct	Not Set
Tatro, Betty	Office	1002	FT	Direct	Seeler, Matthew M.
Wolf, Hannah	Contractors	1007	FT	Direct	Lierz, Mitley
Wolf, Jad	Contractors	1006	FT	Direct	Seeler, Matthew M.

Click on the View Audit icon.



🔺 Changed On	Employee	Field Changed	ation Audit History Changed By	From	
	Keeler, Matthew M.	LoginLast		1374606094	1374609894
7/23/2013 02:01 PM	Keeler, Matthew M.	LoginLast		1374601527	1374606094
7/23/2013 12:45 PM	Keeler, Matthew M.	LoginLast		1374588109	1374601527
7/23/2013 09:01 AM	Keeler, Matthew M.	LoginLast		1374520107	1374588109
7/22/2013 05:18 PM	Backup, Joey	Employment Status	Keeler, Matthew M.	automatically termed	Rehired
7/22/2013 05:07 PM	Backup, Joey	Employment Status	Keeler, Matthew M.	Rehired	automatically termed
7/22/2013 04:57 PM	Backup, Joey	Badge Number	Keeler, Matthew M.		1008
7/22/2013 04:56 PM	Backup, Joey	First Name	Keeler, Matthew M.	backup	Joey
7/22/2013 04:56 PM	Backup, Joey	Last Name	Keeler, Matthew M.	backup	Backup
7/22/2013 02:08 PM	Keeler, Matthew M.	LoginLast		1374513058	1374520107
7/22/2013 12:10 PM	Keeler, Matthew M.	LoginLast		1321558975	1374513058
1/17/2011 02:07 PM	Wolf, Hannah	Last Name	Keeler, Matthew M.	Phillips	Wolf
1/17/2011 02:07 PM	Wolf, Jad	Last Name	Keeler, Matthew M.	Bailey	Wolf
1/17/2011 02:07 PM	Wolf, Jad	First Name	Keeler, Matthew M.	Jason	Jad
1/17/2011 02:07 PM	Wolf, Iad	DeptID	Keeler, Matthew M.	2	3
1/17/2011 01:46 PM	Keeler, Matthew M.	Middle Name	Keeler, Matthew M.		м.

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.

=	Audit Display Options	
For Employee	🔍 All Visible Employees In Keeler Co.	\$
Changed By	All Visible Employees In Keeler Co.	0
Date Range of Report	Today	0
	07/23/2013 12:00:00 AM 07/24/2013 12:00:00 AM	И
Modified Fields	LoginLast Manager DeptID Last Name Default Job First Name Password Employment Statu	= =
Display	Dis	play

• 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.



Bores												
Required	Title/Position:		Mana	ider:	Lierz, W	hitnev	0					
Personal	rineji obition.			.gen.	, II	inche j						
Employment	Payroll Type:	Direct						\$				
Pay	, ,,											
	Holiday Group:	All Holidays						0				
Contact												
Emergency	Organizational Unit:	Family						0				
E-Mail	Default Department:	Family						٥				
Mis cellaneous	Delaut Department.	rannity						Ŷ				
Permis sions	Default Tob:	None						0				
Departments	5											
Schedule	ID / Badge:	1005	Alter	nate Number:			1005 Alternate Number:					
Custom	Start Date:	11/17/2011	Emp	oved:	Yes (Char	nge)						
Custom Burdened Rates	Start Date:	11/17/2011 Direct (Edit)	Empl	oyed:	Yes (Char	ige)						
Custom Burdened Rates Allocations	Start Date: Workweek Group:	Direct (Edit)										
Custom Burdened Rates Allocations Payroll Tool	Start Date:			oyed: (Add Changes			Status	Pay Otl				
Custom Burdened Rates Allocations	Start Date: Workweek Group:	Direct (Edit)			Title Em			Pay Oth				
Custom Burdened Rates Allocations Payroll Tool	Start Date: Workweek Group: Status:	Direct (Edit)		Add Changes	Title Em	ployment [!	Number]				
Custom Burdened Rates Allocations Payroll Tool Helper	Start Date: Workweek Group: Status:	Direct (Edit)		Add Changes	Title Em	ployment 1 ID/Badge N Revert Ro	Number	Pay Oth] Save Ro				
Custom Burdened Rates Allocations Payroll Tool Helper Keele	Start Date: Workweek Group: Status: Delete:	Direct (Edit) FT Delete Employee	View	Add Changes Print Badge	Title Em Suggest	ployment 1 ID/Badge N Revert Ro	Number w	Save Ro				
Custom Burdened Rates Allocations Payroll Tool Helper Keele Keeler, M	Start Date: Workweek Group: Status: Delete: er, Larry	Direct (Edit) FT Delete Employee Family	View,	/Add Changes Print Badge FT	Title Em Suggest	ployment 1 ID/Badge M Revert Ro Ke	w	Save Ro atthew M. Set Vhitney				
Custom Burdened Rates Allocations Payroll Tool Helper Keeler Keeler, N Lier,	Start Date: Workweek Group: Status: Delete: er, Larry Matthew M.	Direct (Edit) FT Delete Employee Family Administration	1003 1000	/Add Changes Print Badge FT FT	Title Em Suggest	ployment 1 ID/Badge M Revert Ro Ke	w	Save Ro Satthew M.				
Custom Burdened Rates Allocations Payroll Tool Helper Keeler, M Lier, Lierz, Tatro	Start Date: Workweek Group: Status: Delete: er, Larry Vatthew M. z, Ken Whitney , Betty	Direct (Edit) FT Delete Employee Family Administration Family	1003 1000 1004	Add Changes Print Badge FT FT FT	Title Em Suggest	ployment 1 ID/Badge N Revert Ro Ke	w E eler, Ma Not Lierz, V Not	Save Ro atthew M. Set Vhitney				
Custom Burdened Rates Allocations Payroll Tool Helper Keeler, M Lier, Lierz, Tatro	Start Date: Workweek Group: Status: Delete: er, Larry Matthew M. z, Ken Whitney	Direct (Edit) FT Delete Employee Family Administration Family Administration	1003 1000 1004 1001	/Add Changes Print Badge FT FT FT FT	Title Em Suggest	ployment 1 ID/Badge N Revert Ro Ke	w la eler, Ma Not Lierz, V Not eeler, Ma Lierz, V	Save Ro atthew M. Set Vhitney Set atthew M. Vhitney				
Custom Burdened Rates Allocations Payroll Tool Helper Keeler, M Lier, Lier, Tatrr Wolf,	Start Date: Workweek Group: Status: Delete: er, Larry Vatthew M. z, Ken Whitney , Betty	Direct (Edit) FT Delete Employee Family Administration Family Administration Family	1003 1000 1004 1001 1002	/Add Changes Print Badge FT FT FT FT FT FT	Title Em Suggest	ployment 1 ID/Badge N Revert Ro Ke	w la eler, Ma Not Lierz, V Not eeler, Ma Lierz, V	Save Ro Set Vhitney Set atthew M.				

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



		Bac	lge Print	ting Options		
			Graphic	to use when t	here is no employee photo**:	
		[•		Browse	
Select employe	ee group [Manage]: e Employees In Keeler C	co. 🗘				?
Employees be Images must supported.	elonging to multiple sites be in JPG or PNG form	will have a badge at only. All other f	formats v	vill be ignored.	PNG files using transparency ("alpha")	are not
			Vertical	Badges	_	
Select Layout:		Letter 8.5" >	(11" (8	per page) 🌣		
Field 1:		Company Lo	go		•	
Field 2:	Name: (La			iddle)	•	
Field 3: Employee			noto		\$	
Field 4: Organiz			nal Unit		•	
Field 5: Badge Nu			er w/ Ba	rcode	\$	
Vertical Aligni	ment	Dispersed	>			
Horizontal Ali	gnment	Center 🗘				
Show Gridline	25	Yes 🗘				
		P	rint Verti	cal Badges		
			lorizont	al Badges		
Select Layout:	Letter 8.5" x 11" (8 p	per page) 🗘				
Left Field 1:	Company Logo		0	Right Field 1:	Name: (Last, First Middle)	٥
Left Field 2:	Employee Photo		٥	Right Field 2:	Organizational Unit	٥
Left Field 3:	Blank Field		\$	Right Field 3:	Badge Number w/ Barcode	٥
Left Field 4:	Blank Field		\$	Right Field 4:	Blank Field	٥
Left Field 5:	Blank Field		٥	Right Field 5:	Blank Field	٥
Left Side Vertical Alignment	Dispersed 🗘			Right Side Vertical Alignment	Dispersed 2	
Left Side Horizontal Alignment	Center 🗘			Right Side Horizontal Alignment	Center 🗘	
Show Gridlines	Yes 🗘					

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

- Select the employee or group of employees from the drop down menu in the top left corner.
 Optional: Choose a default image to use if there is no Employee Photo on file.
 Decide on either a Vertical (portrait) or Horizontal (landscape) format, then edit the fields on that section.
 Ochoose 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

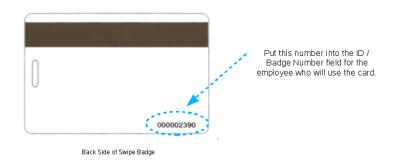
Keypad Systems

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.



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:

a	Add a new Organizational Unit
Organizational Unit Name:	Organizational Unit Code:
Employees in	Employees in
Other Organizational Units	This Organizational Unit
Backup, Joey Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken	Tatro, Betty
Lierz, Whitney Wolf, Hannah Wolf, Jad	
	Create Organizational Unit

1. Click on the + (plus) sign in the far left corner of the Add a New Organizational Unit bar.

In the box directly below Organizational Unit Name, enter the unit's nam
 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

=	Display Options
	Show inactive Organizational Units
	Display

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

To Edit an Existing Organizational Unit

Code Employees
Empty 2
EMP 1
Employees
EMP
Enabled •
Save Row
100

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

To Edit Employee Membership

	🔺 Name	Code	En	nployees
 Administration 		Empty		2
Family		Empty		5
General Membership				
	Currer	nt Employees:		
	Boresow, Patty		~	
	Keeler, Larry			
	Lierz, Ken			
	Tatro, Betty			
	* Backup, Joey			
	1. /			
			\sim	
	Move to Organizational Un	it: Administration	•	
		Move		
			Revert Row	Save Row
				Save Row

 Click on the + (plus) sign to the left of the organizational unit name to expand the unit's details.
 Click on the Membership tab.
 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:

lame: Slackers Short Name: Bums	
Code: 44 Manager: No Manager	0

Click on the + (plus) sign in the far left corner of the Create a New Department bar.
 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.

3. Click the Create Department button to save.

The new department will then display in the list below.

			Show Inactive Departments 🗆
	🔺 Name	Code	Employees
	Administration	2	2
	Family	1	4
+	Friends	3	2
	Slackers	44	0
∇			100 🗘

To Include Inactive Departments

			Show Inactive Departments 🗹
	🔺 Name	Code	Employees
	Administration	2	2
	Family	1	4
	Friends	3	2
	Inactive employees	4	0
	Slackers	44	0
∇			100 \$

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

	Create a New	/ Department	
			Show Inactive Department
	🛆 Name	Code	Employees
٠	Administration	2	2
۲	Family	1	4
	Friends	3	2
	Slackers	44	0

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

General Information

	Show Inactive Departments						ctive Departments 🛽		
		🔺 Nam	e		Code		Employees		
.							2		
	Family				1		4		
		Friend	s		3		2		
	Inactive employees			4		0			
General Settings	ral Settings Default Membership Membership Membership Restrictions Clocks Clock Restrictions					ıs			
Name					Inactive Employees				
Short Name	Short Name					Inactive	Inactive		
Code						0			
Manager Keeler, Matth					, Matthew M. 🚽				
Enabled							Enabled 💌		
					[🔊 Revert Row	🔒 Save Row		

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

- Enter or adjust the Department's Name, Short Name, and/or Code if necessary.
 Select the correct Manager from the drop down list.
 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.
 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

		🔺 Name			Code		Employees	
	Adı	ministratior	1		2		2	
*		Family			1	4		
۲		Friends			3		2	
	:	Slackers			44		0	
General Setting:	Default Membership	Membership	Membership Restrictions	Clocks	Clock Restrict	ions		
Sub Code						101		
Control Num	ber					202		
GL Number						303		
Alternate Nur	nber					404		
Enable Time	Tracking						Track	•
Enable Bene	it Tracking						Track	•
Enable Holid	ay Tracking						Track	
Enable Piece	work Tracking						Track	•
						🔊 Revert R	ow 🔒 Sav	e Row

- Click on the Settings tab.
 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.
 Consult 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 Chable Banefit Tracking to allow this Department to show up as an option wher council or clocks, were clocking, or up clocking, batch manipulated.
 Chable Banefit Tracking to allow this Department to show up as an option when configuring Holiday practicing to allow this Department to show up as an option when configuring Holiday pay.
 Chable Piecework Tracking to allow this Department to show up as an option when configuring and entering Piecework.

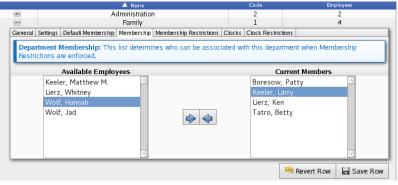
Save your changes by clicking on the Save Row button.

Default Membership

	🔺 Name	Code	Em	ployees			
	Administration	2		2			
E Family		1		4			
General Settings Default Membership Membership Restrictions Clocks Clock Restrictions							
The employees listed here have the department Family listed as their default Department.							
	Boresow, Patty		<u></u>				
	Keeler, Larry						
	Lierz, Ken						
	Tatro, Betty						
	Change the selected employees' Def	ult Department t					
	Administration Change D	efault Membership)				
			🔄 Revert Row	🔒 Save Row			

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

General Settings Default Membership Membership Mem	bership Restrictions Clocks Clock Restrictions					
Membership Restrictions: By restricting the Department's members, only the specified employees will be able to associate events with the department.						
Employee Restrictions	No Restriction	s members, only the specified employees will be able to No Restriction to this Department. ees on the Membership tab and Employees that have this be able to clock in to this Department. the Membership tab will be able to clock in to this				
Department configured as their Default Depart • Restrict to Members Only: Only employees	o clock in to this Department. : Employees on the Membership tab and Employees that have this rtment will be able to clock in to this Department. ; listed on the Membership tab will be able to clock in to this rtment configured as their Default Department, but are not members	, will				
	Revert Row 🛛 🔚 Save R	ow				

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

General Settir	ngs Default Membership	Membership Memb	ership Restrictions	Clocks	Clock Restrictions		
	ociations: This list de is are enforced.	etermines which o	locks can be as:	sociated	d with the departm	ent when Cl	ock
Not Associated				Ass	Associated		
Ν	Aaster Station		\$				
					5	Revert Row	🔒 Save Ro

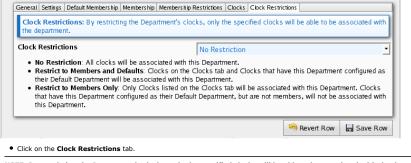
Click on the Clocks tab.
To move Clocks in or out of this Department, click on the clock's name and use the blue arrows to move them from "Not Associated" to "Associated" and vise versa.

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 Membership 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.

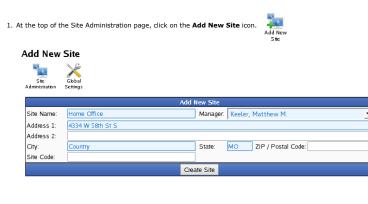
Site Adminstration

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:



- Enter the Site Name.
 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.

Enter the physical Address. (optional)
 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.

Cleanwater					
Clearwater	Keeler, Matthew M.	4 stations	2 employees		
Home Office	Keeler, Matthew M. 0 stations 0 employee				
opeka / Lawrence	Lierz, Whitney	0 stations	0 employees		
Wichita	Keeler, Matthew M.	0 stations	0 employees		
			100 \$		
ſ	Fopeka / Lawrence	Fopeka / Lawrence Lierz, Whitney	Fopeka / Lawrence Lierz, Whitney 0 stations		

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.

-	Display Options			
	Available Columns		Displayed Columns	
Select an employee's presets for this page:	Street Address Address Line 1 Address Line 2 City State Postal Code Employees Clock Stations	v Display	Site Name Manager Clocked In Up Down	

- 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.
- 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.
 Click on the **Display** button to view the changes in the Site Administration table.
 OR Click on **Save Preset** to save your custom view.

Name
Enter a name for this preset: Address View
OK Cancel

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

Γ	Prompt									
	Please click the appropriate button to save "Address View"									
	as Personal Presetas Division Presetas Global Preset Cancel									

• 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.

=	Display Options	
	Available Columns	Displayed Columns
Select an employee's presets for this page:	Address Line 1	Site Name
🥄 Keeler, Matthew M. 😂	Address Line 2	Manager
Reeter, Hatthew H.	Postal Code	Street Address
	Employees	City
Default	Coverage	> < State
[Division] Address View 🗘	Code	Clock Stations
Save Preset Delete Preset Make Default	Division	Clocked In
Dave Hoset Deleter Hoset Haite Delatit	\sim	Up Down
	C	Display

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

	🔺 Site Name	Manager	⊂ity	State	Postal Code	Employees	Clock Stations	Clocked In
•	Clearwater	Keeler, Matthew M.	Clearwater	KS	67026	2 employees	4 stations	2 employees
•	Home Office	Keeler, Matthew M.	Country Time	MO	67471	0 employees	0 stations	0 employees
🛞 T	Topeka / Lawrence	Lierz, Whitney	Topeka / Lawrence	KS	66601	2 employees	0 stations	0 employees
•	Wichita	Keeler, Matthew M.	Wichita	KS	67201	2 employees	0 stations	0 employees
								100 \$

To sort the table by the selected column values, click on the column header (i.e., Site Name, Manager, Clocked In, etc.).
 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.

	🔺 Site Name		М	anager	Clocked In		
8	Clearwater		Keeler,	2	2 employees		
Information	Clocks Employees Teleph	one Coverage IP Addre	sses Jobs	Department	s Clocked In	Helper	
Site Name:	Clearwater		Manager	Keeler, N	4atthew M.		0
Address 1:							
Address 2:							
City:	Clearwater		State:	KS	ZIP / Postal	Code: 6702	6
Site Code:							
					Сору	/ Manager	Copy Address
					🔊 Re	evert Row	🔒 Save Row

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.

		🔺 Site Name					Manager		Clocked In		
-)		Cleanwater			K	eeler,	Matthew M.		2	employees	
	Information C	lo_ks Employees	Telephone	Coverage	IP Addresses	Jobs	Departments	Clocked In	Helper		
	Clocks Not at This Site Clocks at This Site										
	TimeIPS Ma	aster Server				M	aster Statio	n			
	Technical Ale	ert E-mail:					🗹 Ser	nd E-mail /	Alerts	Copy Alerts	
									🥱 Revert Row	Save Row	

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.

🔺 Site Name		Manager	Clocked In
Clearwater	k	eeler, Matthew M.	2 employees
Information Clocks Employees T	elephone Coverage IP Addresses	Jobs Departments Clocked I	n Helper
Employees Not at			ees at This Site
Boresow, Patty	<u>_</u>	Keeler, Larry	<u>_</u>
Keeler, Matthew M.		Tatro, Betty	
Lierz, Ken			
Lierz, Whitney		1	
Wolf, Hannah			
Wolf, Jad			
	\sim		
	Allow Clocks for: All En	nployees 🗘	
		Copy Emp	loyees Copy Allow Clocks
		5	Revert Row 📙 Save Row

• 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 To statuc an employee from 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 radd an employee from 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.

			🔺 Site Nam				Manager				Clocked In		
-)		Clearwate	r		Keeler, Matthew M.					2 employees		
1	Information	Clocks	Employees	Telephone	Coverage	IP Addresses	lobs	Departments	Clocked In	Helper			
			ones not at				5			at This S	site		
	VoIP 1 (at Topeka / Lawrence)												
						Caller ID					Actions Add New		
											Copy Phones		
									S R	evert Rov	v 🔒 Save Row		

- 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.

nformation					IP Addresses	Jobs	Department			
	Pho	ones not at	t This Site					Phones	at This	
VoIP 1 (at Tope	eka / Lawro	ence)			4				
			2165	82-0552	Caller ID		_			Action
			210-2	82-0552						
										Add Ne
										Copy Phone

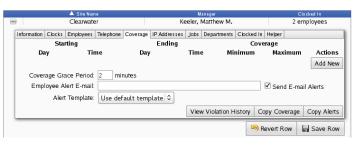
O Type in the Caller ID name or number in the empty box below Caller ID.
 O After clicking Save Row, the option to Delete appears under Actions.

Information	Clocks	Employees	Telephone	Coverage	IP Addresses	Jobs	Departments	Clocked In	Helper	
	Pho	ones not a	t This Site	2				Phones	at This Si	te
VoIP 1 (at Top	eka / Lawr	ence)			\$				×
				_	Caller ID					Actions
				316-582	-0552					Delete
										Add New
										Copy Phones
								S R	evert Row	🖬 Save Row

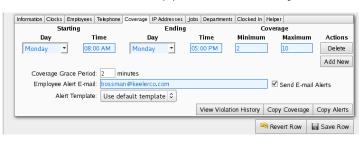
TIP: If "Track Coverage by Caller ID" is active, clock ins/outs made from these names or numbers will be associated with this site for coverage and reporting. In this case, Caller ID entries cannot belong to more than one site. See Global Settings.

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.

		🔺 Site Nam	10	Manager					Clocked In		
6	Clearwater				Ke	eeler,	Matthew M.		2 employees		
	Information	Clocks	Employees	Telephone	Coverage	IP Addresses	Jobs	Departments	Clocked In	Helper	
	Enable D	: IP Tracki	ng							Disabled 🗘	
	IP				P Address					Actions	
											Add New
							🧐 R	evert Ro	w 🔒 Save Row		

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

		🔺 🔺 Site Na	me	Manager					Clocked In			
6)	Clearwat	er	Keeler, Matthew M.					0 employees			
	Information Clocks Employees Telephone Coverage					IP Addresses	Jobs	Departments	Clocked in	Helper		
	Enable D	ynamio	: IP Tracki	ng								Disabled 🗘
				IP Address						Actions		
		2.168.1.100										
					192	2.168.1.101						
												Add New
									C	n Reve	ert Row	🔒 Save Row

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

	▲ Site Name						Manager					Clocked In		
	Clearwater				Keeler, Matthew M.				2	2 employees				
Information	Clocks	Employees	Telephone	Coverage	IP Addresses	Jobs	Departments	Clocked In	Helper					
When a	compute		eviously co		o this site usin I to the list bel						2	nabled 🗾		
				192.16	IP Address]					Actions Delete		
				192.16	58.1.101]					Delete		
												Add New		
									🤊 Reve	ert Row		Save Row		

• 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.

	▲ Site Name		Manager		Clocked In
-	Cleanwater	ĸ	Keeler, Matthew N	4.	0 employees
	Information Clocks Employees Telephone Coverage	IP Addresses	Jobs Departments	Clocked In Helper	
		Jobs			Actions
	Allow Use of	of: All Jobs	0		Add New
				🔊 Reve	rt Row 🔓 Save Row

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

Information Clocks Employees T	elephone Coverage IP Addresses Jobs Departments	Clocked In Helper					
Jobs							
	paint (33) 💽	Delete					
	sheet rock (44) 💌	Delete					
	Allow Use of: Only These Jobs 💌	Add New					
		🔊 Revert Row 🛛 🔒 Save Row					

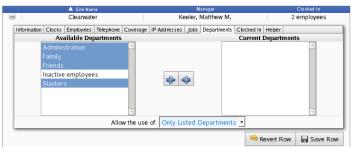
• If the "Allow Use of: Only These Jobs" option is selected, click the Add New button to add those Jobs.

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.

			🔺 Site Na	ime				Manager				Clocked In	
	Cleanwater			Keeler, Matthew M.					2 employees				
1	Information Clocks Employees Telephone Coverage				IP Addresses	Jobs	Departments	Clocked In	Helper			1	
	Currently Clocked In												
						Far	nily						L
	Keeler, Larry Tatro, Be			etty							L		
		sheet ro			pain								L
	2 10	ours, 6 m	inutes		hours, 56	minutes							Ł
											View V	violation History	Ł
							_			-			1
										Reve	ert Row	🔒 Save Row	

Helper

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

🔺 Site Name		Manager	Clocked In
Cleanwater		Keeler, Matthew M.	2 employees
Information Clocks Employees Telephone Coverage IP Addre	sses	Jobs Departments Clocked In Helper	
Copy this information:		To these sites:	
Manager	^	Home Office (All)	-
Address		Topeka / Lawrence (All)	
Technical Alerts		Wichita (All)	
Caller IDs			
Employee List			
Job List			
"Allow Clocks" Options			
Coverage Rules			
Employee Alerts			
	~		~
	C	рру	
	_	Severt F	Row 🔒 Save Row
		- Revent P	Save Row

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.

Clearwater Requ formation Clocks Employees Telephone Coverage IP Ad	iest Si	Keeler, Matthew M. Iccessful.	2 employees
		Jobs Departments Clocked In Helpe	er
Copy this information:		To these site	es:
Manager	>	Home Office (All)	
Address		Topeka / Lawrence (All)	
Technical Alerts		Wichita (All)	
Caller IDs			
Employee List			
Job List			
"Allow Clocks" Options			
Coverage Rules			
Employee Alerts			
	\sim		
	Co	ру	
	_		
		Revert	Row 🔚 Save Row

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.

Gbbal Settings		
	Global Site Settings	
Track Coverage by IP Address:		\checkmark
Track Coverage by Caller ID:		\checkmark
	Submit	

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.
 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

Inclusion

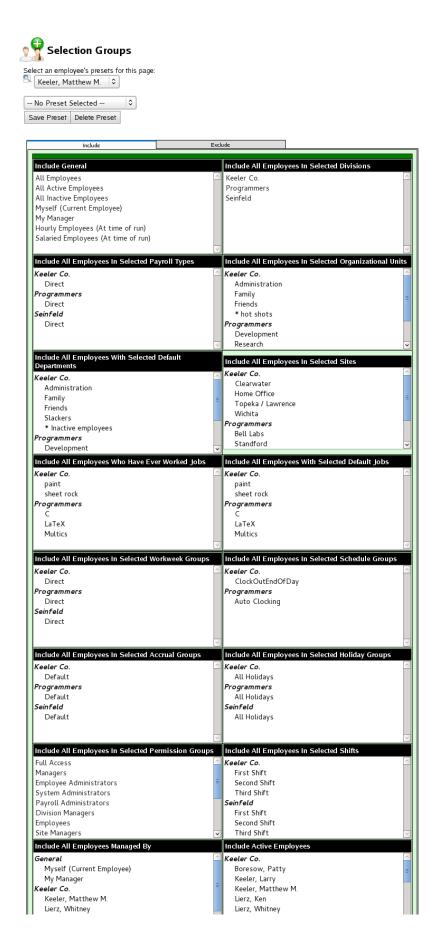
To include certain groups and/or employees, select the Include tab on the top of the box. The box will be green to indicate inclusion.
 Select groups and/or employees from the different sections: General, Divisions, Default Departments, Sites, etc.

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.



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	Exclu	
Exclude General		Exclude All Employees In Selected Divisions
All Employees		Keeler Co.
All Active Employees	_	Programmers
All Inactive Employees		Seinfeld
Myself (Current Employee) My Manager		
Hourly Employees (At time of run)		
Salaried Employees (At time of run)		
	\sim	2
Exclude All Employees In Selected Payroll Types	;	Exclude All Employees In Selected Organizational Units
<i>Keeler Co.</i> Direct		Keeler Co. Administration
Programmers		Family
Direct		Friends
Seinfeld		* hot shots
Direct		Programmers
		Development
	\sim	Research
Exclude All Employees With Selected Default Departments		Exclude All Employees In Selected Sites
Keeler Co.	\frown	Keeler Co.
Administration		Clearwater
Family	=	Home Office
Friends		Topeka / Lawrence
Slackers		Wichita
* Inactive employees		Programmers Bell Labs
Programmers		Standford
Development	~	
Exclude All Employees Who Have Ever Worked J	obs	Exclude All Employees With Selected Default Jobs
Keeler Co.	^	Keeler Co.
paint		paint
sheet rock		sheet rock
C C		Programmers
LaTeX		C LaTeX
Multics		Multics
Futures	~	- Million
Exclude All Employees In Selected Workweek Gr	oups	Exclude All Employees In Selected Schedule Groups
Keeler Co.	^	Keeler Co.
Direct		ClockOutEndOfDay
Programmers		
		Programmers
Direct		Programmers Auto Clocking
Direct Seinfeld		
Direct		
Direct Seinfeld		
Direct Seinfeld	ps	
Direct Seinfeld Direct	ps <	Auto Clocking
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou	ps	Auto Clocking
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co.	ps	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co.
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default	≥ ps	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default Seinfeld	ए ps र	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default	ps	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default Seinfeld	ps <	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default Seinfeld	<	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default Seinfeld Default	<	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Reeler Co. Default Programmers Default Seinfeld Default Exclude All Employees In Selected Permission G	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default Seinfeld Default Exclude All Employees In Selected Permission G Full Access	<	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators System Administrators	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Seinfeld
Direct Seinfeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default Seinfeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators System Administrators Division Managers Division Managers	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Seinfeld First Shift
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Reeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators System Administrators Division Managers Employees	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Seinfeld First Shift Second Shift Seinfeld First Shift Second Shift Seinfeld First Shift Second Shift
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Division Managers Employees Site Managers	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Second Shift First Shift Second Shift Third Shift Second Shift Third Shift Second Shift Third Shift
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Division Managers Employees Site Managers Exclude All Employees Managed Ey	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Seinfeld First Shift Second Shift Third Shift
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Payroll Administrators Payroll Administrators Division Managers Employees Site Managers Exclude All Employees Managed By General	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Seinfeld First Shift Second Shift Third Shift Exclude Active Employees Keeler Co.
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Payroll Administrators Payroll Administrators Payroll Administrators Employees Site Managers Employees Site Managers Exclude All Employees Managed By General Myself (Current Employee)	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Second Shift Second Shift Second Shift
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators System Administrators Payroll Administrators Enployees Site Managers Exclude All Employees Managed By General Myself (Current Employee) My Manager	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exdlude Active Employees Keeler Co. Boresow, Patty Keeler, Larry
Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Payroll Administrators Payroll Administrators Payroll Administrators Employees Site Managers Employees Site Managers Exclude All Employees Managed By General Myself (Current Employee)	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Second Shift Second Shift Second Shift
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Division Managers Employees Site Managers Exclude All Employees Managed By General Myself (Current Employee) My Manager Keeler Co.	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exclude Active Employees Keeler Co. Boresow, Patty Keeler, Larry Keeler, Matthew M.
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators Payroll Administrators Payroll Administrators Division Managers Employees Site Managers Exclude All Employees Managed By General Myself (Current Employee) My Manager Keeler Co. Keeler, Matthew M.	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Seinfeld First Shift Seinfeld First Shift Seinfeld First Shift Seinfeld First Shift Seeler Co. Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Payroll Administrators System Administrators Exclude All Employees Managed By General Myself (Current Employee) My Manager Keeler Co. Keeler, Matthew M. Lierz, Whitney	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exclude Active Employees Keeler, Co. Boresow, Patty Keeler, Matthew M. Lierz, Wein Lierz, Whitney
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grout Reeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Division Managers Exclude All Employees Managed Ey General Myself (Current Employee) My Manager Keeler, Matthew M. Lierz, Whitney SeinFeld	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exclude Active Employees Keeler Co. Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken Lier
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grout Reeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Division Managers Exclude All Employees Managed Ey General Myself (Current Employee) My Manager Keeler, Matthew M. Lierz, Whitney SeinFeld Costanza, Frank	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exclude Active Employees Keeler Co. Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken Lier
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Division Managers Exclude All Employees Managed Ey General Myself (Current Employee) My Manager Keeler Co. Keeler, Matthew M. Lierz, Whitney SeinFeld Costanza, Frank Exclude Inactive Employees	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exclude Active Employees Keeler Co. Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken Lier
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Payroll Administrators Division Managers Exclude All Employees Managed By General Myself (Current Employee) My Manager Keeler Co. Keeler, Matthew M. Lierz, Whithey SeinFeld Costara, Frank Exclude Inactive Employees Keeler Co.	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exclude Active Employees Keeler Co. Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken Lier
Direct SeinFeld Direct SeinFeld Direct Exclude All Employees In Selected Accrual Grou Keeler Co. Default Programmers Default SeinFeld Default Exclude All Employees In Selected Permission G Full Access Managers Employee Administrators System Administrators Payroll Administrators Division Managers Exclude All Employees Managed By General Myself (Current Employee) My Manager Keeler Co. Keeler, Matthew M. Lierz, Whithey SeinFeld Costara, Frank Exclude Inactive Employees Keeler Co.	iroups	Auto Clocking Exclude All Employees In Selected Holiday Groups Keeler Co. All Holidays Programmers All Holidays Seinfeld All Holidays Exclude All Employees In Selected Shifts Keeler Co. First Shift Second Shift Third Shift Exclude Active Employees Keeler Co. Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken

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.

2 Selec	ction Grou	ps	
	oyee's presets fo atthew M. 😂	or this pa	ige:
No Preset	•		
Save Preset			

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

	Name
	Enter a name for this preset: Tardy Report
	OK Cancel
riogrammers	I difficy

• 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.

III Muco	It if urrant Employaal	Prompt		
		Please click the appro "Tardy F		
	as Personal Preset	as Division Preset	as Global Preset	Cancel
ILIFICU	anniers		I difficy	

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.

[Division] Tardy Report			
Save Preset	Delete Preset	Make	e Default

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

Custom Fields		
A	dd a new Custom Field	
Field Key:	Field Title:	
Def	fault Vaule:	
	Create	
🔺 Field Title	Field Key	Default Value
	No Results Found	
\bigtriangledown		100 🗘

Creating a New Custom Field

Add a new Custom Field				
Field Key:hello kitty Field Title:bike transit				
D	Default Vaule:3			
Create				

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 field "bike transit" was created successfully and can be referenced by the key "custom_helloKitty" in custom reporting. This field is not yet visible to other divisions, but can be made visible by expanding the field below and selecting applicable divisions.

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

	🔺 Field Title	Field Key	Default Value	
۲	bike transit	helloKitty	0	Edit
				100 \$
\sim				

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.

	Edit Field				
	Field Key: Field Default Vaule:3				
Cancel Edit Delete					

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.

Prompt			
Deleting a custom field will delete all custom user data stored in that field. This will permanently erase user data. This operation can not be reversed.			
Are you sure that you want to continue?			
Confirm Cancel			

Who Can See the Custom Field

	🔺 Field Title	Field Key	Default Value			
	bike transit	helloKitty	3	Edit		
	Employees that are managers in the selected divisions will be able to see this custom field on the Employee Administration Page, under the "Custom" tab.					
	Can not see this field	d.	Can see this	s field.		
	Programmers Seinfeld		Keeler Co.			
			🥱 Revert Row	🔚 Save Row		
\bigtriangledown				100 \$		

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.

ll Name	ID/Badge					
		Manager	Organizational Unit	Payroll Type	Status	bike transi
w, Patty	1005	Lierz, Whitney	Family	Direct	FT	0
bike transit		d				
1						
1						
_						
1						
1						
1						
1						
	bike transit					

To Display the Custom Field in the Employee Table.

23 Employee Administration				
Add View Audit Print Employee Badges				
	nd Display Options			
	e's presets for this page:			
S Keeler,	Matthew M. 🗘			
No Prese	et Selected 🗘			
Save Prese	Save Preset Delete Preset			
Sure riese				
Limit Selection by group:	Available Columns Displayed Columns			
🔍 All Visible Employees In Keeler Co. 🔷 🗘	Military Status A Full Name			
Full Organizational	Race ID/Badge			
Name: Unit:	Biometric Prints Enrolled Manager			
ID/Badge: Employment	Workweek Group (Current)			
Status:	workweek Group (Last)			
Manager: Address:	bike transit Status			
Address Show Inactive	Remote			
Line 2: Employees:	Holiday Group			
L C	Display			

• 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.

	🔺 Full Name	ID/Badge	Employees Manager	Organizational Unit	Payroll Type	Status	bike transit
٠	Boresow, Patty	1005	Lierz, Whitney	Family	Direct	FT	1
۲	Keeler, Larry	1003	Keeler, Matthew M.	Family	Direct	FT	0
۰	Keeler, Matthew M.	1000	Not Set	Administration	Direct	FT	0
۲	Lierz, Ken	1004	Lierz, Whitney	Family	Direct	FT	0
۲	Lierz, Whitney	1001	Not Set	Administration	Direct	FT	1
٠	Tatro, Betty	1002	Keeler, Matthew M.	Family	Direct	FT	1
۲	Wolf, Hannah	1007	Lierz, Whitney	Friends	Direct	FT	1
•	Wolf, Jad	1006	Keeler, Matthew M.	Friends	Direct	FT	0
∇							100 \$

• 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 **<u>Custom Reporting/Payroll Export Settings</u>** Article.

o: Reporting/Payroll Export Settings		
ninders		
EML Email Automation module provides the al	ility to create automated email reminders for a number of common situations.	
the left pane Main Menu » Admir	istration, click on: Employees » Reminders	
Reminders		
-	Create a new reminder	
	A Reminder Name	
	No Results Found	
	100 🗘	
ick on the + (plus) sign in the far upper left-h	and corner of the Create a new reminder bar.	
OTE: If you have not yet added a templat	e, you will be directed to do so first before continuing.	
o templates currently exist for employee remind o to System > E-Mail Templates and create an nce a template has been created, return here ar		
Add an E-Mail Template		
Using the left pane Main Menu »	Administration, click on: System » E-Mail Templates	
Using the left pane Main Menu » .	Administration, click on: System » E-Mail Templates	
Using the left pane Main Menu » .	Administration, click on: System » E-Mail Templates	
	Administration, click on: System » E-Mail Templates	
Using the left pane Main Menu » ,	Administration, click on: System » E-Mail Templates	
E-Mail Templates	Administration, click on: System » E-Mail Templates	
	Administration, click on: System » E-Mail Templates	
E-Mail Templates		
E-Mail Templates	duling alens.	
E-Mail Templates Available Templating Options These types of alerts are used for advanced sche [badge] The employee's badge number [orgUnt] The employee's badge number [orgUnt] The employee's manager name	duling alens.	
E-Mail Templates Comparison of the second s	duling alens.	
E-Mail Templates Available Templating Options These types of alerts are used for advanced sche [badge] The employee's badge number [orgUnt] The employee's organizational unit's n [manage1] The employee's manager name [manage1] The employee's namager name	duling alens.	
E-Mail Templates Comparison of the second s	duling alens.	
E-Mail Templates Comparison of the second s	duling alerts. une	
E-Mail Templates Complete the series of advanced scheme the series of the series of advanced scheme the series of the serie	duling alerts. tme Create a new template Ernail Templates Name	
E-Mail Templates Control Cont	duling alerts. ame Create a new template Email Templates Name nefits Under Day Hours, Use Benefits	
E-Mail Templates E-Mail Templates Comparison of the set of the s	duling alerts. ame Create a new template Email Templates Name nefits Under Day Hours, Use Benefits	
E-Mail Templates E-Mail Templates Comparison of the second	duing alerts. ume Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 ♀	
E-Mail Templates E-Mail Templates Comparison of the set of the s	duling alerts. ume Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits I 100 \$	
E-Mail Templates E-Mail Templates E-Mail Templating Options These types of alerts are used for advanced sche tbadge] - The employee's badge number forgunal - The employee's organizational und's n imanger] - The employee's manager name imanger] - The employee's manager name imanger] - The employee's manager name imanger] - The employee's name isock - The original default message isock - The original default message isock - The original default subject Under Day Hours, Use Be Under Week Hours, Use B O Click on the + (plus) sign in the far left cc C Choose "Employee Reminders" as the Ale Add a descriptive Template Name.	duing alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ rner of the Create a new template bar. t Type. Create a new template	
E-Mail Templates E-Mail Templates Constant State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State	duling alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits enefits Under Week Hours, Use Benefits enefits Under Week Hours, Use Benefits to under Week Hours, Use Benefits enefits enefits to under Week Hours, Use Benefits enefits enefits to under Week Hours, Use Benefits enefits to under Week Hours, Use Benefits enefits enefits enefits enefits enefits to under Week Hours, Use Benefits enefits	
E-Mail Templates E-Mail Templates E-Mail Templating Options These types of alerts are used for advanced sche tbadge] - The employee's badge number forgunal - The employee's organizational und's n imanger] - The employee's manager name imanger] - The employee's manager name imanger] - The employee's manager name imanger] - The employee's name isock - The original default message isock - The original default message isock - The original default subject Under Day Hours, Use Be Under Week Hours, Use B O Click on the + (plus) sign in the far left cc C Choose "Employee Reminders" as the Ale Add a descriptive Template Name.	duing alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ rner of the Create a new template bar. t Type. Create a new template	
E-Mail Templates E-Mail Templates Conserve the serve of a left and under an used for advanced sche (badge) - The employee's badge number (or duranced sche (badge) - The employee's organizational und's na (manager) - The employee's name (ranager) - The employee') - The employee' (ranager) - The employee')	duing alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ rner of the Create a new template bar. t Type. Create a new template	
E-Mail Templates E-Mail Templates Constant State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State State	duing alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ rner of the Create a new template bar. t Type. Create a new template	
E-Mail Templates E-Mail Templates Conserve the serve of a left and under an used for advanced sche (badge) - The employee's badge number (or duranced sche (badge) - The employee's organizational und's na (manager) - The employee's name (ranager) - The employee') - The employee' (ranager) - The employee')	duing alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ rner of the Create a new template bar. t Type. Create a new template	
E-Mail Templates E-Mail Templates Conserve the serve of a left and under an used for advanced sche (badge) - The employee's badge number (or duranced sche (badge) - The employee's organizational und's na (manager) - The employee's name (ranager) - The employee') - The employee' (ranager) - The employee')	duing alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ rner of the Create a new template bar. t Type. Create a new template	
E-Mail Templates E-Mail Templates Conserve the serve of a left and under an used for advanced sche (badge) - The employee's badge number (or duranced sche (badge) - The employee's organizational und's na (manager) - The employee's name (ranager) - The employee') - The employee' (ranager) - The employee')	duing alerts. ume Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ mer of the Create a new template bar. t Type. Create a new template Reminder Template	
E-Mail Templates E-Mail Templates Constraint of the second	duing alerts. Inne Create a new template Email Templates Name nefits Under Day Hours, Use Benefits enefits Under Week Hours, Use Benefits 100 \$ rner of the Create a new template bar. t Type. Create a new template	

Email Templates								
	🔺 Туре	Name						
	Employee Reminders	Reminder Template						
	Under Day Hours, Use Benefits	Under Day Hours, Use Benefits						
	Under Week Hours, Use Benefits	Under Week Hours, Use Benefits						
			100	٥.				

 ${\rm O}\,$ You can now return to the ${\rm Reminders}\,$ 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.

a	Create a new reminder
Reminder Name	End of Year
Run As	🔍 🛛 Keeler, Matthew M. 🔷
Employees	🔍 All Visible Employees In Keeler Co. 🔷
Notify	🔍 🛛 All Visible Employees In Keeler Co. 🔷
Description	There are less than 30 days left to use vacation time. Request time off ASAP.
Remind On	Day(s) Before Selected Relative Day Every Year
Days Before	30
Relative Day	Specific Date 💌
Specified Date	01/01/2014
Template	Reminder Template
Add Reminder	Add Reminder

- 1. Add a descriptive Reminder Name.
- Add a descriptive Reminder Name.
 Under Run As, choose which employee the reminder will be run under. Typically, you will specify yourself.
 Choose which Employee(s) this reminder applies to.
 Choose which employee(s) this reminder will Notify, using each employee's preferred contact method as configured on the employee's "Email" tab.
 Add a detailed Description of the reminder.
 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.
- Choose the email **Template** to use when sending out notifications.
 Click the **Add Reminder** button to implement the alert. It will be added to the Reminder List below.

▲ Reminder Name
 End of Year
100 \$

To Edit an Existing Reminder

	🔺 Reminder Name	
8	End of Year	
Reminder Name	End of Year	
Run As	🔍 Keeler, Matthew M.	0
Employees	🔍 All Visible Employees In Keeler Co.	٥
Notify	All Visible Employees In Keeler Co.	0
Description	There are less than 30 days left to use vacation time. Request time off ASAP.	
Remind On	Day(s) Before Selected Relative Day Every Year	0
Days Before	30	
Relative Day	Specific Date	٥
Specified Date	01/01/2014	
Template	Reminder Template	٥
Process or Test	Process Reminder Process As Tes	st
Delete	Delet	te
	🔊 Revert Row 🛛 🔚 Save Ro	w
	100	\$

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.
 O 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
- 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



	Permissions Settings	
	Permission Group	Default Group
	Department Administrators	No
ы	Division Managers	No
9	Employee Administrators	No
9	Employees	Yes
6	Full Access	No
9	Job Administrators	No
6	Job Managers	No
)	Managers	No
)	Pawn	No
9	Payroll Administrators	No
	Piecework Administrators	No
6	Site Managers	No
ы	Site Supervisors	No
9	System Administrators	No

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

General Settings	Modify Permissions	Permissions Summary	Employees						
Name						Kee	eler Co	Managers	
Name of the p	ermission group.								
Description									
Description of	the permission gro	up.							
Is Default Gro	oup							Default G	noun
New employe employees.	es will always be a.	ssigned to a default pe	rmission gro	up. This does n	iot affect ex	isting	0.3	Delaute	oup
Delete Permi	ssion Group							De	lete
Delete this pe	rmission group.							DC	iere i
						S Reve	rt Tab	- Save	Tab

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.

General Settings	Modify Permissions Perm	issions Summary	Employees					
			🔺 Permission	i Item				
			Can Manage					
			Departme					
			Division					
			Employe Jobs	as				
(H)			Sites					
			Sub Divisi	ons				
			Employees					
8			Clock Mess	ages				
Сюск ме	ssages: Allows the emp	Target Group		k messages for othe	Delete	Create	Edit	View
		Address View	/					
		For all employe	es					
	For employee	es assigned to jo		ge				
	For employ	yees in divisions	s you manage					
	For empl	oyees in sites y	ou belong to					
	For emp	loyees in sites y	ou manage				\checkmark	\checkmark
	For employees in	the organization	nal unit you be	long to				
	For employees	that specify you	u as their man	ager				
	For empl	oyees with your	payroll type					
	For employe	es working on jo	bs you manag	je				
	For	employees you	manage					
		For yourself						
٠			artment Clock					
		Depart		e Membership				
		_	Departme					
(H)			loyee Biomet					
			mployee Con					

Permissions Summary

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

seneral Setting	s Modily Permissions	Permissions Summary	Employees	n Itam				
			Can Manage					
			Can Manage Sites					
0	Taraa	t Group	Sites	Delete	Create	Edit		View
	May be a			Delete	Create			Ten
0			Employees					
			Clock Mes	sages				
		Target Group			Delete	Create	Edit	View
	For emplo	oyees in sites you m	anage					
-		Emp	oloyee Biome	tric Settings				
	Target Group				Delete	Create	Edit	View
	For emplo	oyees in sites you m	anage		V		Ø	Ø
8		E	mployee Co	ntact Info				
		Target Group			Delete	Create	Edit	View
	For emplo	oyees in sites you m	anage					V
-			Employee Do	cuments				
		Target Group			Delete	Create	Edit	View
	For emplo	oyees in sites you m	anage		M	X	M	V
•		En	iployee E-ma	il Settings				
		Target Group			Delete	Create	Edit	View
	For emplo	oyees in sites you m	anage					Ø
		Emplo	yee Emergen	cy Contact Inf	o			
		Target Group			Delete	Create	Edit	View
	For emplo	oyees in sites you m	anage					V
		Em	ployee Emple	oyment Info				
		Target Group			Delete	Create	Edit	View
	For emplo	oyees in sites you m	anade					V

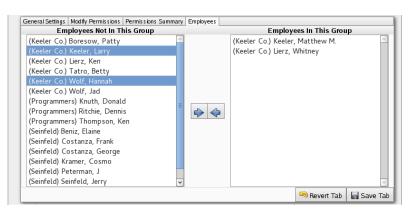
Employees

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

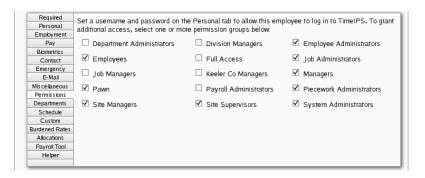
- 1. Click the + (plus) sign next to the group you would like to add them to.
- 2. Go to the **Employees** tab.
- 3. Click on the employee's name to highlight it in the Employees Not In This Group column. Hold down the control key to highlight mulitple names.
- 4. Click the arrow pointing right to move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

Add New Permission Group		
Name The name of the new permission group.	Keeler Co Ma	nagers
Template A pre-existing permission group to use as a basis for the new group.	Site Managers	•
Create Group		Create

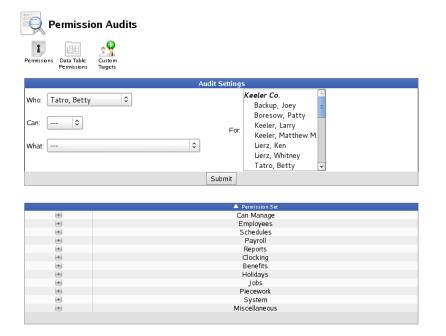
- 1. Choose a Name for the new permission group.
- 2. From the Templates drop-down box, choose a pre-existing permission group to use as a basis for the new group.
- 3. After clicking the Create button, the new permission group will appear in the Permissions Settings table.

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.

-	Schedules	
	No Permissions for Selected Options	

- In this example...
 O 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.

	Permission Set				
	Can Manage				
	Employees				
	Schedules				
	Payroll				
Cust	tom Payroll/Report Presets [custom-payrollreport-presets]	create	delete	edit	¥İ
or yourself [self]					
	Override Pay Type [override-pay-type]	create	delete	edit	¥İ
or yourself [self]					
	imesheet Approval-1 (Employee) [timesheet-approval-1]	create	delete	edit	vi
	imesheet Approval-1 (Employee) [timesheet-approval-1]	create	delete		_
Ti	imesheet Approval-1 (Employee) [timesheet-approval-1]	create	delete		_
Ti	imesheet Approval-1 (Employee) [timesheet-approval-1] Reports	create	delete		_
Ti for yourself [self]		create	delete		_
Ti or yourself [self]	Reports	create	delete		_
Ti For yourself [self]	Reports Clocking	create	delete		_
For yourself [self]	Reports Clocking Benefits	create	delete		_
For yourself [self]	Reports Clocking Benefits Holidays	create	delate		vi
For yourself [self]	Reports Clocking Benefits Holidays Jobs	create	delete		_

Example 2: See everyone who can create Job Categories.

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

Who: Image: Create Image:	Ai	udit Settings
industry (1)	Can: create 0	For: Keeler, Larry Keeler, Matthew M. Lierz, Ken Lierz, Whitney
Submit		Submit

• The list will show who can create Job Categories.

		Permission Set				
-		Jobs				
		Job Categories [job-categories]				
For all visible divi	sions [all-d	livisions]	create	delete	edit	view
Boresow, Patty	y		N			
Keeler, Matthew	w M.		V			
Seinfeld, Jerry			V			
For all divisions y	ou manage	[division-managed-divisions]	create	delete	edit	view
Keeler, Matthev	w M.		N			
Seinfeld, Jerry			×			

 $\label{eq:Example 3: See everyone who can work with badges.$

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

	A	udit Setting	s
Who: 0 Can: 0 What: ID/Badge Functions	\$	For:	Keeler Co. Backup, Joey Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken Lierz, Whitney Tatro, Betty
		Submit	

Clocking				
ID/Badge Functions [badge-functions]				
For all visible divisions [all-divisions]	create	delete	edit	view
Boresow, Patty	N		N	
Keeler, Matthew M.			M	
Seinfeld, Jerry	N	V	M	
For all divisions you manage [division-managed-divisions]	create	delete	edit	view
Keeler, Matthew M.			V	1
Seinfeld, Jerry		V		M

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

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

		Aı	udit Setting:	5	
Who: Boresow, Patt Can: edit > What: Clock Events	(\$	\$	For:	Keeler Co. Backup, Joey Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken Lierz, Whitney Tatro, Betty	
			Submit		

		Permission Set				
-		Clocking				
	Clock Even	its [clock-events]	create	delete	edit	view
or all employe	es [all]				M	
or employees	you manage [managed]				M	
or employees	in sites you manage [site-n	nanaged]			M	
or employees	in sites you belong to [site-	peers]			M	

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.

E Da	ita Tab	le Permissions		
Permissions	Audit	Custom Targets		
			Data Table Permissions	
			Employee Data	
\bigtriangledown				100 🗢

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

	Data Table Permissions ▲ Configurable Da	
•	Employee D	ata
General Fields		
Table Name	Employee Data	
Default Permission Item	Employees	•
	J 1 7	
		🔊 Revert Row 🛛 🔚 Save Ro
		100

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

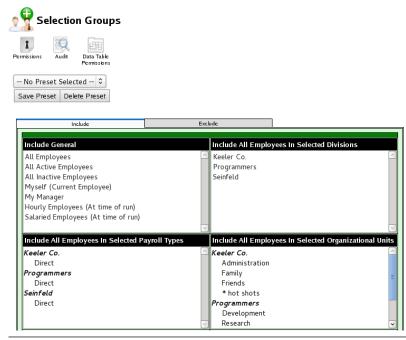
Field Permissions provides a way to control which permission option is used for specific fields, primarily in the employee database tables. Under the "Fields" tab, each data **Field** is connected to a default **Permission Item**. Selecting a different Permission Item allows giving or restricting access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

Data Table Permissions ▲ Configurable Data Tables				
	Employee Data			
General Fields				
Field Name	Permission Item			
Address 1	Employee Contact Info	0		
Address 2	Employee Contact Info	\$		
Alarm Access	Miscellaneous Employee Info	0		
Birthday	Employee Personal Info	•		
Cell Phone Number	Employee Contact Info	\$		
Tity	Employee Contact Info	0		
Default Department	Employee Employment Info	\$		
Default Job	Employee Employment Info	•		
Emergency Contact 1 Address 1	Employee Emergency Contact Info	0		
Emergency Contact 1 Address 2	Employee Emergency Contact Info	0		
Emergency Contact 1 City	Employee Emergency Contact Info	0		
Emergency Contact 1 Name	Employee Emergency Contact Info	0		

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.



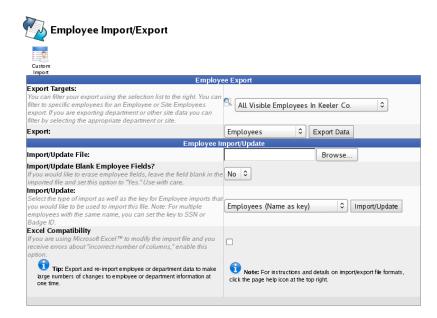
Check out the Selection Groups article for detailed instructions.

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.

- 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 <u>OpenOffice</u> Calc.
- Adjust the spreadsheet as necessary.
 O 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.
- 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.

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: O The file must be a comma separated value (CSV) file. (i.e. Excel worksheet, OpenOffice Spreadsheet, or ASCII Comma Delimited) O The field (column) name must be exact. You may delete columns. Columns may be in any order.
- o 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

Custom Custom Employee Import Then click on the Custom Employee Import icon



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 <u>OpenOffice</u> Calc to create the needed Comma Separated (CSV) file.

Custom Employee Import
Select Preset: No Preset Selected 🗘 Delete
Add a new Mapping
Number of header lines in the imported file: 0 Select File: //home/user/Documents/Em/ Browse Upload

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.

		EmpExpor	t.csv – LibreO	ffice Calc		_ = ×
<u>F</u> ile	<u>E</u> dit <u>V</u> iew	<u>I</u> nsert F <u>o</u> rr	mat <u>T</u> ools	<u>D</u> ata <u>W</u> indov	w <u>H</u> elp	
	• 🖴 🛃 (2 🔽 🔊			D 🗋 🛓 😒	• »
	Liberation S	ans	• 10 ·	• 🔺 🖌		»
G13		~ f(x)	Σ = [•
	A	В	С	D	E	F 🗠
1	EmpExport08	/23/2013				
2	first	last	status	dept	govid	
3	Bret	Solow	Full	Maintenance	1234567890	-
4	Scott	Althouse	Full	Construction	1234567891	
5	Daniel	Hopper	Full	Kitchen	1234567892	
6	Jenny	Figeuroa	Part	Music	1234567893	_
7	Will	Wood	Part	Grounds	1234567894	
8						_
9						
10						~
	B Sheet1 Shee	t2 / Sheet3 / 🔶 /	•			Ð
Sheet	1/3 Defau	lt	=I 🖹	Sum=0		120%

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.

		EmpExpor	t.csv – LibreO	ffice Calc		_ 🗆 🗙
<u>F</u> ile	<u>E</u> dit <u>V</u> iew	<u>I</u> nsert F <u>o</u> ri	mat <u>T</u> ools	<u>D</u> ata <u>W</u> indov	w <u>H</u> elp	
	• 🖴 🛓 (2 🔽 🔊			D 🗋 🏄 😒	• »
	Liberation S	ans	• 10 ·	· 🔺 🖌		»
H11		~ f(x)	Σ =			•
	A	В	С	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						~
	B Sheet1 Shee	t2 / Sheet3 / 🔶 /	<	III		Ð
Sheet	1/3 Defau	lt	=I 🖹	Sum=0		120%

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.

Custom Employee Import
Select Preset: No Preset Selected 🗘 Delete
Add a new Mapping
Number of header lines in the imported file: 0 Select File: /home/user/Documents/Em Browse Upload

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.

		Custom En	nployee Import						
	Select Preset: No Preset Selected 🗘 Delete								
	The f		e imported file but have not yet been in the preset.						
0	8 🔉 🚯	Imported Column, Expression, or Default Value	TimelPS Target Field						
	$\odot \circ \circ$	first	Don't Import	×					
	$\odot \circ \circ$	last	Don't Import	×					
	$\odot \circ \circ$	status	Don't Import	×					
	$\odot \circ \circ$	dept	Don't Import	×					
	$\odot \circ \circ$	govid	Don't Import	×					
		Number of header lines	·						
_			·						
			xport.csv						

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.

		Custom Employee Import
_	Select Prese	t: No Preset Selected 🗘 Delete
		ist in the imported file but have not yet been signed in the preset.
3	🛞 📡 🚯 Imported Column, Expression, or Default Value	TimeIPS Target Field
	Interview of the second sec	First Name
	● ○ ○ last	Last Name
	● ○ ○ status	Status
	O dept	Department
\checkmark	● ○ ○ govid	SSN
_	🙉 🕅 🝙 Imported Column, Expression, or Default Value	New Mappings
0	0 87 🔮	TimeIPS Target Field
0		
	0 87 🔮	TimeIPSTarget Field Time Zone =if[(dept)="Maintenance","C ST","PST")
0	 • • • • • • • • • • • • • • •	TimePSTuget Fald Time Zone =if([dept]="Maintenance","C ST","PST")
		TimeIPSTarget Field Time Zone =if([dept]="Maintenance","C ST","PST"): Manager

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.

1	Legend:
	• 🧭 Mark this column as a Unique Import Key.
	 B This column imports data using an imported column as a source.
	Example 2 This column imports an expression into the target TimeIPS Field.
	• 1 This column specifies a static default value to be inserted into the target TimeIPS Field.

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

					New Ma	appings	
3	B	Ş	•	Imported Column, Expression, or Default Value		TimeIPS Target Field	
	0	۲	0	Expression		Time Zone	>
					=if([dept]="Ma ST","PST")	aintenance","C	
					Add a nev	w Mapping	

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.

	I	0	9 🚯	Imported Column, Expression, or Default Value	TimeIPS Target Field	
l		0 (0	Jessie Bee	Manager	X
					Add a new Mapping	

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.

Prompt	_
Please enter a name for this new preset: Camp Keeler	
 Submit Cancel	

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

Custom Employee Import						
	Select Preset: Camp Keeler 🗘 Delete					
9	The f		s have been configured for import. rery column in the file needs to be accounted for. TimePS Tayet Fiel			
	000	first	First Name			
	$\odot \circ \circ$	last	Last Name			
	$\odot \circ \circ$	status	Status			
	\odot \bigcirc \bigcirc	dept	Department 💥			
	$\odot \circ \circ$	govid	SSN			
	\odot \odot \bigcirc	Expression	Time Zone			
			ance","CST","PST")			
	$\circ \circ \bullet$	Jessie Bee	Manager 💥			
	Add a new Mapping Number of header lines in the imported file: 0					
		EmpEx	(port.csv			
		Begin	Import			
		Save Pres	et Cancel			

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.

		Custom Employee Import	
		Select Preset: No Preset Selected 🗘 Delete	
		New Mappings	
1	8 🖓 🚯	Imported Column, Expression, or Default Value TimeIPS Target Field	
	$\odot \circ \circ$	Don't Import	- X
	$\odot \circ \circ$	Don't Import	×
	$\odot \circ \circ$	Don't Import	×
	$\odot \circ \circ$	Don't Import	×
	$\odot \circ \circ$	Don't Import	×
		Add a new Mapping	
		Number of header lines in the imported file: 0	
		Select File: Browse Upload	
		Save Preset	

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 fil	e to be imported.
----	--------------	---------------	-----------------	-------------	-------------------

TIP: We recommend using a spreadsheet application such as Excel³⁴ or <u>OpenOffice</u> 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.

Custom Employee Import
Select Preset: No Preset Selected \$ Delete
Add a new Mapping
Number of header lines in the imported file: 0 Select File: /home/user/Documents/Em Browse Upload

3. Click on the **Upload** button.

4. Choose a **Preset** (or follow the directions above for creating a new preset).

				Cu	stom Em	oloyee Import	
				Select Preset:	Camp Kee	ler 🗘 Delete	
J	0	TI	1e ⁻			5 have been configured for import. ery column in the file needs to be accounted for. TimeIPS Target Field	
	۲	0	0	first		First Name	×
	۲	0	0	last		Last Name	×
	۲	0	0	status		Status	×
	۲	0	0	dept		Department	×
☑	۲	0	0	govid		SSN	×
	С) (0	Expression	="Maintena	Time Zone ance","CST","PST") :	*
	С	0	۲	Jessie Bee		Manager	×
				Number of hear	der lines in	v Mapping the imported file: 0 port.csv	
						Import	
					Save Pres	et Cancel	

5. Click on the Begin Import button.

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

	Custom Employee Import
	Review Your Changes
Lin	Errors: Errors must be corrected before the file can be imported. e 0: Importing this file would violate the number of allowable active Employee Licenses. e 0: Importing this file would violate the number of allowable Remote Clocking Licenses.
Line	In Provide the New York and the New York a
	This import contains errors that need to be fixed.
	Return to Configuration Page

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

Dis	play Options	
Select Date Range	This Week	٥
	From: 09/02/2013 12:00:00 AM	CDT
	To: 09/09/2013 12:00:00 AM	CDT
Select Employee or Group	All Visible Employees In Keeler Co.	0
	Include Inactive E	nployees
Report Grouping	Group By Wee	<u>د</u>
Report Columns	First In, Last Out	٥
Include Notes	🗹 Inclus	le Notes
Include Totals	🗹 Includ	le Totals
Hide :00 Minutes	🗹 Hide :00	Minutes
Hide Employees/Weeks/Days With No Schedule	✓ Hide Empty Set	hedules

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

🧑 Autom	natic Time Adjustments		
Audit			
	Automatic Adjustment Rule	es by Payroll Type	
		Direct	
			100
	▲ Employee	Rules	
•	Boresow, Patty	Payroll Type - Direct	
*	Keeler, Larry Keeler, Matthew M.	Payroll Type - Direct Payroll Type - Direct	
•	Lierz, Ken	Payroll Type - Direct Payroll Type - Direct	
	Lierz, Whitney	Payroll Type - Direct	
	Tatro, Betty	Payroll Type - Direct	
		Payroll Type - Direct	
	Wolf, Hannah		
*	Wolf, Hannan Wolf, Jad	Payroll Type - Direct	

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.

		Autom	atic Adjustmer	t Rules by Payr					
8				Direct	t				
Clock Rounding Lunch	Deductions	Time Snaps	Employee Helper	Audit					
non-exempt em	nployees, p not intende	lease seek d for non-ex	legal advice bef empt employee or for tracking tir	mpt employees b ore using any kir s subject to Unit ne that is not use customer time.	nd of roundi ed States F	ng. In Federal	particular, tl Labor Law	ne "Minii (FLSA).	mize Only
Clock-In Rounding	ı						Do not ro	ound	0
Clock-Out Roundin	ng						Do not ro	ound	0
Job Change Round	ding						Do not ro	ound	0
Full Duration Rour	nding						Do not ro	ound	0
Rounding Direction	n						Fa	ir	0
						_			
						🤊 R	evert Row	🔒 Sa	ive Row

• 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.

			Autom	atic Adjustmer	nt Rule	s by Payroll ٦ ▲ Payroll Type	Гуре		
	-					Direct			
	Clock Rounding	Lunch Deductions	Time Snaps	Employee Helper	Audit				
							Add	a new Automatic L	unch Deduction
								🔊 Revert Row	🔒 Save Row
$\overline{}$									100 🗘

• Click the Add a new Automatic Lunch Deduction button.

Automatic Adjustment R	ules by Payroll Type A Payroll Type	
	Direct	
Clock Rounding Lunch Deductions Time Snaps Employee Helper Auc	lit	
When an employee clocks out after working at least	07:00:00	All Days 🛆 🗶 Monday
Attempt to deduct a lunch at	12:00 PM	Tuesday
with a duration of	00:30:00	Wednesday Thursday Friday Saturday
Don't deduct lunch if employee has taken a breat	c of the specified length.	Sunday 🗸
	Add a new Auto	matic Lunch Deduction
	Rever	t Row 🛛 🔒 Save Row
∇		100 🗘

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
- Craig clocks in at 6:00 PM and clocks out at 2:00 AM the following morning. His work day, because she was not clocked-in for the full duration of the time the automatic funct 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 funct would duction because 1) he was not clocked in the full duration of the time the automatic funct 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, the bursch et al. 12:00 AM (bursch automatic bursch et al. 12:00 AM). 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.

	Automatic Adjustment Rules by Payroll Type Automatic Adjustment Rules by Payroll Type		
	Direct		
Clock Rounding Lunch Deduction	s Time Snaps Employee Helper Audit		
		Add a new	Time Snap Rule
		🔊 Revert Row	🔒 Save Row
\bigtriangledown			100 🗘

• Click the Add a new Time Snap Rule button

	Automatic Adjustment Rules by Payroll Type Payroll Type	
	Direct	
Clock Rounding Lunch Dedu	uctions Time Snaps Employee Helper Audit	
When employees	Clock In 😫	All Days All
between	07:30:00 AM and 07:59:00 AM	Wednesday Thursday Friday
Move time to	08:00:00 AM	Saturday Sunday 🗸
		Add a new Time Snap Rul
		🤊 Revert Row 🛛 🔒 Save Ro
		100

• 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.

	Automatic Adjustment Rules by Payroll Type ▲ Payroll Type
	Direct
	Eack Rounding Lunch Deductions Time Snaps Employee Helper Audi By default, employees that are members of this payroll type will follow the settings you have configured here. To customize these rules per-employee, setect the employee or employee group you wish to copy these settings to, and click "Copy to Employees". You will then be able to customize the employee rules in the Employee Adjustments table below. Image: All Visible Employees in Keeler Co. Image: Copy to Employees
	Revert Row 🛛 🖶 Save Row
\bigtriangledown	

• 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.

-	Employee Boresow, Patty	Rules Custom Rules	
	ng Lunch Deductions Time Snaps Copy Help	er Reset Audit e, or to other employees, select the employee or employee gr	oupvo
		ings to, and click "Copy to Employees".	
	🔍 🛛 All Visible Er	nployees In Keeler Co. 🗘	
	C	opy To Employees	
		Severt Row 🔒 Sav	e Row
+)	Keeler, Larry	Payroll Type - Direct	
+)	Keeler, Matthew M.	Payroll Type - Direct	
+)	Lierz, Ken	Payroll Type - Direct	
+)	Lierz, Whitney	Payroll Type - Direct	
	Tatro, Betty	Payroll Type - Direct	
+)		Payroll Type - Direct	
*) *)	Wolf, Hannah		

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.

		Autor	natic Adjustment Rule	s by Pay A Payro				
				Dire	ct			
Clock Rounding	Lunch Deduc	tions Time Snaps	Employee Helper Audit					
▲ Changed	Employee	Payroll Type	Time Adjustment Se Setting	etting Au Old	udit New	Ву		
09/04/2013 02:58 PM		Direct	Rounding Direction	Fair	Maximize Time	Keeler, Matthew M.		
09/04/2013 02:58 PM		Direct	Rounding: ClockIn		5 min	Keeler, Matthew M.		
09/04/2013 02:58 PM		Direct	Rounding: ClockOut		5 min	Keeler, Matthew M.		
\bigtriangledown								
					S Rev	vert Row 🔒 Save Row		
						100		

Automatic Time Adjustment By EMPLOYEE

	Employee Custom Time	Rules
	Boresow, Patty	Payroll Type - Direct
Create Custor	m Setting Audit	
	This employee is currently following the Automatic	
Click the C		the Payroll Type settings to create customized Automatic
	Time Adjustments f	for this employee.
	Create Custo	om Setting
		🧐 Revert Row 🛛 🔚 Save Row
+)	Keeler, Larry	Payroll Type - Direct
H	Keeler, Matthew M.	Payroll Type - Direct
e)	Lierz, Ken	Payroll Type - Direct
E)	Lierz, Whitney	Payroll Type - Direct
e)	Tatro, Betty	Payroll Type - Direct
-	Wolf, Hannah	Payroll Type - Direct
+)		Payroll Type - Direct
±)	Wolf, Jad	Payron Type - Direct
	Wolf, Jad	Payron type - Direct

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.

	Employee C	ustom Time Adjustn	rent Rules
	Boresow, Patty		Custom Rules
			custom rules
	ling Lunch Deductions Time Snaps Copy H		1.4.4
To copy the			yees, select the employee or employee group you
		ettings to, and click "O	
	🛰 All Visible	Employees In Keeler	Co. 🗘
		Copy To Employees	
		Copy to Employees	
			Revert Row 🛛 🔒 Save Row
	Keeler, Larry		Payroll Type - Direct
	Keeler, Matthew M		Payroll Type - Direct
	Lierz, Ken		Payroll Type - Direct
	Lierz, Whitney		Payroll Type - Direct
	Tatro, Betty		Payroll Type - Direct
	Wolf, Hannah		Payroll Type - Direct
	Wolf, Jad		Payroll Type - Direct
			100 0

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.

	🔺 Employee		Rules
8	Boresow, Patty		Custom Rules
Clock Round	ting Lunch Deductions Time Snaps Copy H	Iper Reset Audit	
To copy the	ese customized rules to another emplo	ee, or to other employees, select th	e employee or employee group y
	wish to copy these s	ettings to, and click "Copy to Employ	yees".
	🔍 All Visible	Employees In Keeler Co.	
		Copy To Employees	
			🔊 Revert Row 🛛 🔒 Save Row
	Keeler, Larry	F	Payroll Type - Direct
	Keeler, Matthew M	F	Payroll Type - Direct
۲	Lierz, Ken	F	Payroll Type - Direct
	Lierz, Whitney	F	Payroll Type - Direct
•	Tatro, Betty	F	Payroll Type - Direct
	Wolf, Hannah		Payroll Type - Direct
		5	Payroll Type - Direct
	Wolf, Jad		ayron type brice.

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.

+			oresow, Patty Keeler, Larry		Custom Rules Payroll Type - Direc	:t
Create Custo	m Setting	Audit				
			Time Adjustme	nt Setting Audit		
🔺 Changed	Employee	Payroll Type	Setting	Old	New	
09/04/2013 11:21 AM	Keeler, Larry		Revert to Type Settings	Custom Settings	Type Settings	Keeler, Matthe M.
09/04/2013 11:21 AM	Keeler, Larry	Direct	Copy Custom Settings from Type	Following Type Settings	Copied from Type Settings	Keeler, Matthe M.
09/04/2013 12:32 PM	Keeler, Larry		Revert to Type Settings	Custom Settings	Type Settings	Keeler, Matthev M.

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

Audit

			Time Adjustment	Setting Audit		
🔺 Changed	Employee	Payroll Type	Setting	Old	New	Ву
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



Add a Schedule Group

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

=	Add New Group	
Group Name:	HolidayWorkers	Add

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

						ichedule Gr	oups			
		ClockOut	EndofD		🔺 Name				Alert E	
		HolidayW		ay					Em Em	
	General	Automatic	Clocking	Default Jobs	Minimum Break	Break Rules	Advanced Rules	Salary Option	s	
	Group N	lame:	Holiday	Workers						
	Alert E-	mail:								
			☑ Do	Not Send S	chedule Deviat	tion Alerts to	Alert E-mail			
			🗆 Su	opress All M	lissed Clock A	lerts				
			🗆 Su	opress Miss	ed Clock Alert	s on Holiday	s			
			_			'	day Observance	2		
			_		ed Clock Alert	5		-		
			_				sage Occurs D	uring Day		
			_ 010	capie / tatolin	ane crocking i	a beneni o	sage occars b	, i i i i i i i i i i i i i i i i i i i	n Revert Tab	Save Tab
									- Revent Tab	Save Tab
										100 \$
V										

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

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.
 Click on the Automatic Clocking tab.

Groups	Alert E-mail
	Empty
	Empty
les Advanced Rules Salary Options	
	Add New Rul
king Rules	
- Ending Time	Action
Its Found	
	es Advanced Rules Salary Options

3. Click on the Add New Rule button.

			🔺 Name	ichedule Gr	oups			Ale	ert E-mail	
	ClockOutEndOfDa	y						E	Empty	
	HolidayWorkers							E	Empty	
Genera	Automatic Clocking	Default Jobs	Minimum Break	Break Rules	Advanced Rules	Salary Opt	ions			
									Add New	Rule
										rearc
			A	uto Clockin	g Rules					Tunc
	▲ Starting) Time	A	uto Clockin _{Ending}				Actio		Turc
	▲ Starting Monday at 1	,			Time		Clo			Turc

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

Schedule Groups	
▲ Name	Alert E-mail
Clock OutEndOfDay HolidayWorkers	Empty Empty
neral Automatic Clocking Default Jobs Minimum Break Break Rules Advanced Rules	
Ierai Automatic Clocking Delaut Jobs Minimum Bleak Bleak Rules Advanced Rules	Add New Rule
	Add New Ital
Auto Clocking Rules	Action
▲ Starting Time Ending Time Monday at 12:00 AM Saturday at 12:00 AM	Clock In At 08:00 AM
Starting Day	
The day of the week the rule becomes effective.	Monday 🗘
Starting Time The time of the day the rule becomes effective.	12:00 AM
The une of the day the full becomes elective.	
Ending Day	Saturday 🗘
The day of the week the rule stops being in effect.	. , .
Ending Time	12:00 AM
The time of the day the rule stops being in effect.	
Action	
Determines which action will be performed when the conditions for this rule h	Change Job At Time
been met.	
At Time	08:00 AM
The time at which the above action should be triggered.	08.00 AM
Work Order / Jobs The work order / job that the employee will be changed into when the rule trig	No Work Order 💌
The work order / job that the employee will be changed into when the fulle ang	
	sheet rock (44) 🝷
Requires	Require In During Rule
Optional restrictions to be applied in order for the rule to be considered in effe	ect. Require Out During Rule
	Require Duration During Rule V
Send Alert	
When this auto clocking rule triggers, send an e-mail alert to the group's Alert	E-mail and to any of Send Alerts
the employee's e-mail addresses set to receive Schedule Alerts.	,
Delete Rule	
Permanently delete this rule.	Delete
	🔊 Revert Row 🛛 🔚 Save Row
	100
7	100

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:
 O 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 at Time - In the At Time 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.

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,
 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.
 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 Att" or "Change Jobs At" functions instead.

Set up Default Jobs

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.
 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.
 Click on the Default Jobs tab.

					hedule Gro:	ups			
				🔺 Name				Alert E	E-mail
	+	ClockOutEndOfDa	ay					Em	pty
	-	HolidayWorkers						Em	pty
	General	Automatic Clocking	Default Jobs	Minimum Break	Break Rules	Advanced Rules	Salary Options		
		Start		E	End		Default Job		Edit
									Add New
							Sev.	ert Tab	🗖 Save Tab
\bigtriangledown									100 🗘

4. Click on the Add New button.

	Sc ▲ Name	hedule Gro	ups		Alert E	-mail
 Clock OutEndOfDay HolidayWorkers 					Em Em	
General Automatic Clocking Defa	ault Jobs Minimum Break	Break Rules	Advanced Rules	Salary Options		
Start	E	nd		Default Jo	b	Edit
Tuesday 12:00 AN	M	▼ 11:59 P	м —	Work Order	0 -	Delete
						Add New
				S R	evert Tab	🔒 Save Tab
7						100

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.

	Schedule Groups		
	A Name	Alert E-r	
ClockOutEndOfDay		Emp	
HolidayWorkers		Emp	:y
General Automatic Clocking Default Jobs	Minimum Break Break Rules Advand	ed Rules Salary Options	
Start	End	Default Job	Edit
Tuesday 🗘 12:00 AM	Tuesday 🗘 11:59 PM	No Work Order 🗘	Delete
Tuesday V 12.00 AM		sheet rock (44)	Delete
Thursday 🗘 12:00 AM	Thursday 🗘 12:59 PM	No Work Order 🗘	Delete
		sheet rock (44)	
Saturday 🗘 12:00 AM	Sunday 0 11:59 PM	No Work Order 🛛 🗘	Delete
Saturday 0 12:00 AM	Sunday Sunday	Deny All Clocks 🗘	Delete
			Add New
		Revert Tab	Save Tab
_			100 🗘
\vee			

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 <u>Employment tab in Employee Administration</u>. 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

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.
 Click on the Minimum Break tab.

110 of 529

			So	hedule Gro	ups				
			🔺 Name				Alert	E-mail	
H	ClockOutEndOfDa	ay					En	npty	
-	HolidayWorkers						En	npty	
General	Automatic Clocking	Default Jobs	Minimum Break	Break Rules	Advanced Rules	Salary Options			
	Start		E	nd	Br	eak	Action	Edit	
								Add New	
						5	Revert Tab	🔒 Save Tab	
								100 🗘)

3. Click on the Add New button

		Schedule Gro ▲ Name	ups	Alert E-m	ail
	ElockOutEndOfDay			Empt	
	HolidayWorkers			Empt	<i>y</i>
	General Automatic Clocking Default Job			ny Options	
	Start	End	Break	Action	Edit
	Monday 12:00 AM	Thursday 🗾 11:59 PM	45 min	Deny and Alert 💌	Delete
					Add New
				🔊 Revert Tab 🔓	Save Tab
\bigtriangledown					100 \$

- Select the day and time when the Minimum Break rule should Start and End from the drop-down boxes.
 Enter the minimum amount of time (in minutes) the Break should last.
 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.

 Click the Save Tab button to keep these changes.

		Schedule Gro	ups	A1	
	ElockOutEndOfDay	A Name		Alert E Emj	
	HolidayWorkers			Emp	
	General Automatic Clocking Default Job	s Minimum Break Break Rules	Advanced Rules Sala	y Options	
	Start	End	Break	Action	Edit
	Monday 12:00 AM	Thursday 11:59 PM	45 min	Deny and Alert	Delete
					Add New
				🔄 Revert Tab	🔒 Save Tab
					100 \$
×.					

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

- 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.
 Click on the Break Rules tab.

Schedule Groups						
	🔺 Name			Alert E-mail		
ElockOutEndOfDa	Y			Empty		
HolidayWorkers				Empty		
General Automatic Clocking	Default Jobs Minimum Break Breal	Rules Advance	d Rules Salary Optic	ns		
Break Rules define automatic actions that happen when an employee clocks in after a break. They can be used to alert someone when an employee returns from break after a certain length or to insert worked time or benefits during the break. A common use case is to insert time on a special Paid or Unpaid break job. Break Rules are designed to ease compliance with US Federal Labor code 29 CFR 785.18 and other similar statutes.						
		Add	New Break Rule	Show Inactive Break Rules 🗆		
	Bre	ak Rules	▲ Name			
	No Re	sults Found	- Name			
∇	none	Suits i Gund		100 🗢		
,				100		

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

_		Add New Break Rule			
		Rule Name: Required			
		Add Cancel			
5. Typ	5. Type in the Rule Name and click the Add button.				

Break Rule	5 Name			
Required - Direct Onl				
Rules Audit				
Rule Name	Required - Direct Only			
Comment				
Enabled	e Enab			
When an employee clocks in after a break of at least	00:00:00			
But not more than	00:10:00			
And the following expression is true	=if([user][type][name]="direct",1,0)			
Insert Time	🗆 Insert Ti			
Send Alert	🗹 Send A			
Use alert template	Select One			

You can then edit the Rule Name.

You can then edit the Rule Name.
 Add an optional brief comment about this rule in the Comment field.
 Check the Enabled box to enable this break rule. Uncheck to disable the rule.
 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.
 Add a maximum inclusive qualifying time of a break to trigger this rule in the "But not more than" box.
 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.

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 Time	🗹 Insert Time
Insert an event lasting	00:10:00
Starting from the beginnning or end of the break	The Beginning of the Break 🗘
Starting this far in to/from the end of the break	00: 00: 00
Add a note to the event	
Insert an event consisting of	Worked Time
When inserting Worked Time into a break containing Benefits	Overlap Existing Events
When inserting Worked Time into a break containing Worked Time	Fill Around Events, Reducing Event Duration
Use Department	Default Department 🗘
Use Job	No Workorder

• 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"

O 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.
O Add a note to the event that is either the clock in note or the benefit note associated with the inserted event.
O 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.

O 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.

Schedule	Groups
🔺 Name	Alert E-mail
ClockOutEndOfDay	Empty
 HolidayWorkers 	admin@keelerco.com
General Automatic Clocking Default Jobs Minimum Break Break R	ules Advanced Rules Salary Options
This schedule starts on 01/01/2011	and repeats for 7 days.
	Create a new Advanced Schedule Rule
No Resu	Its Found
	100 \$
\bigtriangledown	
	🔊 Revert Tab 🛛 🔚 Save Tab
	100 🗘

Set up Salary Options

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.
 Click on the Salary Options tab.

	Sched	lule Gro	ups						
🔺 Name					Al	ert E-mail			
ClockOutEndOfDay						Empty			
HolidayWorkers					admin@	keelerco.c	om		
General Automatic Clocking Default Jobs Minimum	Break Bre	ak Rukes	Advan	ced Rules	Salary Op	tions			
Receive Notifications					9	Select n	o en	nployees	
Notify Employee								C	Ye
Send Unbalanced Notifications								0) Ye
Unbalanced Template						Use de	faul	t templa.	te
Send Changelog								0) Ye
Changelog Template						Use de	faul	t templa.	ite
Minimum Hours to Qualify						5.00			
Balance Daily Hours		Do no	t bala	nce					
Balance Holidays	No speci	ial handl	ling of	holiday	s				
Auto Approve / Disapprove Holidays with	Hours Re	quireme	ent				ſ	Disappro	ve
Balance Method	Adj	ust wor	ked tii	me	_				
						🔊 Revert	Tab	🖬 Sav	e Ta
								[100

- Configure the following necessary terms.

 - Ingure the following necessary terms. O Select the employee to **Receive Notifications** of unbalanceable days and/or a summary of the changes performed. O If the employee should receive a copy of any alerts sent, check the YES box next to **Notify Employee**. O To generate a notification if an employee's day is unable to be balanced, check the YES box next to **Send Unbalanced Notifications** 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 Unbalanced 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 / Di

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						
preakStart	[breakStart]	This is the Unix Timestamp of the last clock out which is the beginning of the break. Convert this with the utcdate function.						
preakEnd	[breakEnd]	This is the Unix Timestamp of the new clock in which is the end of the break. Convert this with the utcdate function.						
iser	[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]	I An optional G.L. Number for this department.						
altNum	[glNum] [user][defaultDepartment]	An optional alternate number used by this department						
trackTime	[altNum] [user][defaultDepartment]	Either a 1 or 0 if this department is tracked against worked time						
trackBenefits	[trackTime] [user][defaultDepartment]	Either a 1 or 0 if this department is tracked against benefits						
trackHolidays	[trackBenefits] [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] A unique database ID about this work order name [user][defaultWorkOrder] [workOrderID] The name of this work order lcdName [user][defaultworkOrder] [lcdName] The observiated name of this work order code [user][defaultworkOrder] [lcdName] The code to identify the work order of ateStart [user][defaultworkOrder] [poNum A P.O. number associated with the work order dateDue [user][defaultworkOrder] [dateDue] The date date of this work order note [user][defaultworkOrder] The date associated with this work order	
Index [Lear] [defaultworkOrder] Stating point for information about the employee's default work order workOrderID [user][defaultworkOrder] A unique database ID about this work order name [user][defaultworkOrder] The name of this work order lcdName [user][defaultworkOrder] The abbreviated name of this work order code [user][defaultworkOrder] The code to identify the work order poNum [user][defaultworkOrder] The code to identify the work order dateStart [user][defaultworkOrder] The date work order is intended to begin dateStart [user][defaultworkOrder] The date work order mote [user][defaultworkOrder] The due date of this work order	
Image: [workOrderID] A unique database ID addit this work order name [user][defaultworkOrder] The name of this work order 1 cdName [user][defaultworkOrder] The abbreviated name of this work order code [user][defaultworkOrder] The code to identify the work order code [user][defaultworkOrder] The code to identify the work order poNum [user][defaultworkOrder] A P.O. number associated with the work order dateStart [user][defaultworkOrder] The date work or der is intended to begin dateBue [user][defaultworkOrder] The due date of this work order note [user][defaultworkOrder] A page associated with the work order	
[name] The finite of this work order lcdName [user][defaultworkOrder] The abbreviated name of this work order code [user][defaultworkOrder] The code to identify the work order poNum [user][defaultworkOrder] A P.O. number associated with the work order dateStart [user][defaultworkOrder] The date work on this work order is intended to begin dateBue [user][defaultworkOrder] The date of this work order note [user][defaultworkOrder] A pote associated with the work order	
Ite abbreviated raties 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 or der is intended to begin dateDue [user][defaultworkOrder] [dateDue] The due date of this work order note [user][defaultworkOrder] A pote accordiated with this work order	
Image: code of identify the work order poNum [user][defaultworkOrder] [poNum] A P.O. number associated with the work order dateStart [user][defaultworkOrder] [dateBue] The date work on this work order dateDue [user][defaultworkOrder] note [user][defaultworkOrder]	
Image: Image:	
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] A pate accordated with this work order	
Indue date of this work order note [[user][defaultworkOrder]	
customer [[user]][defaultworkOrder] [[customer] A starting point for information about the customer on this work order	
cust ID [[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][default]ob][jobID] The unique database ID associated witht his job	
lcdName [user][default]ob][lcdName] The shortened name of this job	
code [user][default]ob][code] The job code used to clock in to this job	
name [user][default]ob][name] The name of the job	
ctrlNum [user][defaultJob][ctrlNum] A control number associated with the job	
billingRate [[user][default]ob] [billingRate] A billing rate associated with the job	
glNum [user][default]ob][glNum] A G.L. number for the job	
description [[user][default]ob] [[description] Any description provided about the job	
subCode [user][default]ob][subCode] An arbitrary sub code identifier for the job	
altNum [user][defaultJob][altNum] The job's alternate number	
customer [user][defaultworkOrder] A starting point for information about the customer on this work order	
custID [user][defaultworkOrder] 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] 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][default]ob][category] Starting point for information about this job's category	
catID [user][default]ob][category] [catID] A unique database ID for this category	
name [[user][default]ob][category] The name of the category	
descr [[user][default]ob][category] A description about this job category	
code [user][default]ob][category] 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 luser'. 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

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.
 Click on the Advanced Rules tab.

	Schedule Groups		
🔺 Name		Alert E-mail	
ClockOutEndOfDay		Empty	
HolidayWorkers		admin@keelerco.com	
General Automatic Clocking Default Jobs M	Inimum Break Break Rules Advanced Rules	Salary Options	
This schedule starts on 01/01/2	2011 and repeats for	7	days.
		Create a new Advanced S	Schedule Rule
	No Results Found		
			100 🗘
		🔊 Revert Tab	🔒 Save Tab
			100 \$

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

		Schedule Groups	
	🔺 Name		Alert E-mail
Clock OutEndOfDay			Empty

ClockOutEndOfDay	Empty
 HolidayWorkers 	admin@keelerco.com
General Automatic Clocking Default Jobs Minimum Break Break F	tules Advanced Rules Salary Options
This schedule starts on 01/01/2011	and repeats for 7 days.
	Create a new Advanced Schedule Rule
Between Saturday at 12:00 AM and	Saturday at 12:00 AM: active 🔀
	100 0
\bigtriangledown	
	🔊 Revert Tab 🛛 🔚 Save Tab
_	100 😂
\vee	

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

Schedule							
A Name	Alert E-mail						
ClockOutEndOfDay	Empty						
HolidayWorkers	admin@keelerco.com						
General Automatic Clocking Default Jobs Minimum Break Break Rules Advanced Rules Salary Options							
This schedule starts on 01/01/2011	and repeats for 7 days.						
	Create a new Advanced Schedule Rule						
Between Saturday at 12:00 AM and	Saturday at 12:00 AM: active						
Name							
Enforce a Start Date for this rule							
Enforce a Start Date for this rule	Seffective						
	09/05/2013 05:18:23 PM						
Enforce an End Date for this rule	Effective						
This rule is valid each period from	Saturday 🗢 at 12:00:00 AM						
This rule is valid each period until							
This rule is valid each period unui	Saturday 🗘 at 12:00:00 AM						
Run action if	All conditions are true						
	🗟 Save Rule						
	Create a new Condition						
Na Basu	Conditions Its Found						
No nesa	ns i ounu						
	Create a new Action						
	Actions						
No Resu	Its Found						
∇							
	100 0						
\bigtriangledown							
	🔄 Revert Tab 🛛 🔚 Save Tab						
	100 0						
V							

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 a start 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 reframe 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 unit! Saturday at 12:00:00AM.

- Decide whether to Run action if "All conditions are true" or "Any coniditon 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 an conditions are use is selected, every condution 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 -	+ (pl	us)	sign	to the	lef	t of	the new	condition to	expand	the	window	and	set up t	he terms.

		Create a new Condition
	Conditions	
8	If time marked as "Holiday" is at least 4 minutes consecutively	inactive 🔀
lf:	lf 🗘	
Status:	Holiday 🗘	
For at least:	00:04:00 and no more than:	00:00:00
When:	Currently and Consecutively	
Note:		
		🔚 Save Condition

3. Select the necessary terms.
O "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 yoo: The employee is clocked in to the specified yoo.
 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 evaluates 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.
 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.

	Create a new Action
	Actions
N	o Results Found
∇	
\bigtriangledown	100 \$
	🔊 Revert Tab 🛛 🔒 Save Tab

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

		Create a new Action
	Actions	
	Clock out immediately after rule is triggered	active 🔀
\bigtriangledown		

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 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: Clock the employee in to the selected job. If already in, change job. If already in, thange job. If already in the job/work order, clock out and back in.
 Clock In to Job: Clock 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 clocking up unproved to create an alert for early and the selected benefit type for the employee. 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)
 - If the time that the action will be applied to (always mes 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
 - 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 - 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
 - Ingger (III-III) and take the action immediately (00:00:00) or some time after the last parties for example, doe certain time immediately (00:00:00) or some time before the last punch. For example, take a break (deduct time) 2 hours before the
 Trigger (IH: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

- Uration controls the length of particular actions that will be taken. For deduct time, the larget will limit the deduction amount such that the duration will not end up putting the pipoyee 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
- Targeting Veekly Worked Time versus Specified Hours: Consider Hoursed time volted and benefit time for the week.
 Targeting Veekly Worked Time versus Veekly Schedule: Consider worked time and benefit time versus the value of the time schedule of the week.
 Targeting Veekly Worked Time versus Veekly Schedule: Consider worked time and benefit 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 Veekly Worked Time versus Specified Hours: Consider daily worked time versus the time for the week.
 Targeting Daily Worked Time versus Specified Hours: Consider daily worked time versus the time become time.

- 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

				Create	a new Action
8	Send schedule alert e-r	Actions mail immodiately	after rule is triagered		active 🔀
Do:	Send an Alert	1 an Innieulalery	aller fule is triggereu	l	acuve
		~	C		
Send To:	Employee Manager 🚬		Using Template : L	Jse default templ	ate 🗘
When:	Trigger at Time	0	Saturday 🗘 1	2:00:00 AM	
Note:					
					Save Action
				6	Bave Action
∇					
~					
					100 \$
\bigtriangledown					
				🔊 Revert Tab	🔒 Save Tab
					100

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.
To Delete an item, click the red X to the far right of that item.
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.

A way to manually enter time in batches
 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 -

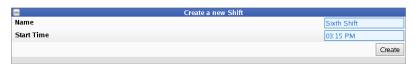
Using the left pane Main Menu » Administration, click on: Clocking » Batch Time Entry

and then c	lick on the Shifts Administration icor	at the top of the page.	
		Administration	
SI	hifts		
		Create a new Shift	
			ow Inactive Shifts and Shift Differentials
	🔺 Division	Shift Name	Start Time
	Keeler Co.	First Shift	08:00 AM
	Keeler Co.	Second Shift	04:00 PM
	Keeler Co.	Third Shift	12:00 AM
			100 🗘

Create a New Shift

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

NOTE: Created	shifts can he	deactived.	but not deleted.	



Edit Shift

- Click the + (plus) sign to the left of the shift.
 From the General Options tab, the Name and Start Time can be changed.
 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.

4. Click the Save Row button.

		Show	v Inactive Shifts and Shift Differentials
	🔺 Division	Shift Name	Start Time
	Keeler Co.	First Shift	08:00 AM
	Keeler Co.	Second Shift	04:00 PM
	Keeler Co.	Third Shift	12:00 AM
	Keeler Co.	Sixth Shift	03:15 PM
General Op	otions Employees Differentials		
Name	1		Sixth Shift
Update	the name of the shift.		
Start Tin			03:15 PM
Update	the start time of this shift.		
Deactiv	ate Shift		
			🔊 Revert Row 🛛 🔒 Save Row
			100 🗘

Add Employees to a Shift

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

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.
 Click the Save Row button.

🔺 Division	Shift Name	Start Time
+) Keeler Co.	First Shift	08:00 AM
H Keeler Co.	Second Shift	04:00 PM
H Keeler Co.	Third Shift	12:00 AM
Keeler Co.	Sixth Shift	03:15 PM
General Options Employees Differentials		
Employees in Other Shifts	Employees in this Shift	
Boresow, Patty	Keeler, Matthew M.	4
Keeler, Larry		
Lierz, Ken		
Lierz, Whitney		
Tatro, Betty		
Wolf, Hannah		
Wolf, Jad	a l	
won, jau		
		Revert Row 🛛 🔒 Save Row
		100

Create a Shift Differential

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

Meeler Co. First Shift 08:00 / How Keeler Co. Second Shift 04:00 First Shift	PM
Keeler Co. Third Shift 12:00 A	AM
Keeler Co. Sixth Shift 03:15 F	PM
General Options Employees Differentials	
Add	d Differential
Name Pay Rate OT Effective Effective Until	
There are no differentials set up for this shift.	
∇	100 🗘
Revert Row	Save Row
∇	100 🗘

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

_	Batch		
e		Create a new Differential	
		Name: 6th Diff Effective: 09/06/2013 02:35:09 PM	nc ar 8.0 8.0
		Save Cancel	:0

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.

Keeler Co.	Sixth Shift		03:15 PM
eneral Options Employees Differentials			
			Add Differentia
Name Pay Rate OT	Effective	Effective Until	Application Order
6th Diff Default	09/06/2013 02:35 PM	No End	1
Name		6th Diff	
Code Name		SixthShift-	-6thDiff
Application Order		1	
Start Date and Time		09/06/2013	3 02:35:09 PM
Differential Duration		01:00:00	
Repetition Period		24:00:00	
Repetition End Date			
Qualifying Start Offset		00:00:00	
Qualifying End Offset		00:00:00	
Qualifying Time Percentage		0.00	
Qualifying Time Break Threshold		00:00:00	
Qualifying Total-Time Minimum		00:00:00	
Hourly Rate			
Differential			
Rate Multiplier			
Рау Туре			Default 🗸
Counts Toward Overtime		-	Default -
		Revert Row	Save Row

1. Click the + (plus) sign to the left of the differential to expand the window and set the terms.

- O You can update the Name of this differential which is used in descriptions and reporting.
 You can update the Amme of this differential which is used in descriptions and reporting.
 You can update the optional Code Name which is used in Custom Payroll and Reports.
 Pick the Start Date and Time this 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.
- O 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.
 O 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.

- 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 addition 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



Submit and Process Time

• 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 4 (plus) sign at the end of the row. To delete, click the red 💢 X at the front of the row.

		Emp	oloyee				Totals			
Kee Kee	resow, Patty eler, Larry eler, Matthew rz, Ken	M.			Shift: First Shift Shift: Second Shift Shift: Sixth Shift			07: 00: 00 09: 00: 00 00: 00: 00		2
Lier	z, Whitney ro, Betty		Ū	~	Shift: Third Shift			00:00:00		
	Date		Hours			co	rd Details			
		First Shift Second	3:30:00		epartment (Worked Time) None	٥	Work Order	•		
×	09/17/2013	Shift Shift Shift Third Shift	4:30:00	5	ob/Benefit :heet rock (44) Note	•	Location None Out Note	\$	÷	
		First Shift	3:30:00		epartment (Worked Time) None	\$	Work Order	0		
×	09/18/2013	Second Shift Sixth Shift Third Shift	4:30:00		ob/Benefit Daint (33) Note	•	Location None Out Note	\$	÷	
Aud	lit Note			Ba	tch Details					

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

Employee			Totals	
Boresow,	Patty			
Keeler, La	ту		Shift: First Shift 03:30:00	
Keeler, Ma	itthew M.		Shift: Second Shift 04:30:00	c
Lierz, Ken			Shift: Sixth Shift 00:00:00	4
Lierz, Whit	ney		Shift: Third Shift 00:00:00	
Tatro, Bet	ty			
Da	te	Hours	Record Details	
	First	3:30:00	Department (Worked Time) Work Order	
	Shift		None C remodel	
	Second Shift	4:30:00	Job/Benefit Location	
09/17/2	2013 Sixth		sheet rock (44) None	+
	Shift			
	Third	· · · · · · · · · · · · · · · · · · ·	In Note Out Note	
	Shift			
			Batch Details	
Audit Note		_		
Boresow, Keeler, Lar			Shift: First Shift 03:30:00	
Keeler, Ma			Shift: Second Shift 04:30:00	c
Lierz, Ken			Shift: Sixth Shift 00:00:00	2
Lierz, Whit			Shift: Third Shift 00:00:00	
Tatro, Bet	ty		×	
Da	ite	Hours	Record Details	
	First	3:30:00	Department (Benefits) Work Order	
	Shift		None None	
	Second Shift	4:30:00	Job/Benefit Location	
	2013		Vacation Vacation	+
09/17/2				
× 09/17/2	Sixth			
09/17/2	Shift		In Note Out Note	
X 09/17/2			In Note Out Note	
	Shift Third		Batch Details	
X 09/17/2 Audit Note	Shift Third			
	Shift Third			

Submit and Process Time

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

\checkmark	Successfully processed data for Keeler, Larry for September 17, 2013 08:00:00 am Successfully processed data for Keeler, Larry for September 17, 2013 04:00:00 pm Successfully processed data for Keeler, Matthew M, for September 17, 2013 08:00:00 am Successfully processed data for Keeler, Matthew M, for September 17, 2013 04:00:00 pm
	h.

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:
- If you choose to Show Time As:

 O 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.
 O Start Time and Duration, the exact clock-in and out time in HH:MM:SS will be displayed in the Hours column.
 O Start and Stop Time, 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.
 Start and Stop Time, 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.
 Start and Stop Time, 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.
 Start and Stop Time, the exact clock-in and out time in HH:MM:SS will be displayed in the Hours column.
 If you select Multiple Employees on how you want to select employee per bath.
 If you select Multiple Employees: 3, 6, or 10 rows, that is how many rows show in the employee column without having to scroll.

 Choose which Shifts to Include by checking the box next to each shift you want to appear in the table.
 The following Advanced Display Options can be...

 a set to Show Each Record, Show Each Batch, or Hide.
 a ranged in any order by changing the number of their Position, 1 appearing first.
 given a Default value.

 - 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.
 - o 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
 - 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.

 - O 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 <u>Tracking Field Administration</u> 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

🔀 Schedule Settings				
	Global Settings			
Repeating Schedule			1 week	0
Future weeks visible in My Schedule			1	
Show Previous Week Schedule		Show Prev	vious Week Schedule in I	My Schedule
Time Without a Schedule is a Violati	on		ime Without a Schedule i	is a Violation
Default Allowable Minutes Before			5	
Default Allowable Minutes After			5	
Default Deny Early Clock In			🗆 Default Deny E	arly Clock-In
Default Email Schedule Violations			🗹 Default Email Schedu	ile Violations
Show notes in My Schedule			Show Notes in 'N	4y Schedule'
Automatically Send Schedules by E-	mail			Disabled 🗘
	Apply Defaults to All Schedules	Save Changes		

• 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 <u>Global Schedule Settings</u> 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.

<u>1 Week Repeating Schedules</u>

Sched Edited	Schedule Repeated					
Sched A	Sched A	Sched A	Sched A	Sched A	Sched A	
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	

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.

<u>I week Repeating Schedules</u>						
Sched Edited	Schedule	Repeated	Sched Edited	Schedule	Repeated	
Sched A	Sched A	Sched A	Sched B	Sched B	Sched B	
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	

1 Maals Departing Caleadulas

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

2 Week Repeating Schedules

Schedule	es Edited		Schedules	s Repeated	
Sched A	Sched B	Sched A	Sched B	Sched A	Sched B
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6

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.

2 Week Repeating Schedules

Schedule	es Edited	Repeated	Edited	Schedules	Repeated	
Sched A	Sched B	Sched A	Sched C	Sched A	Sched C	
Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	

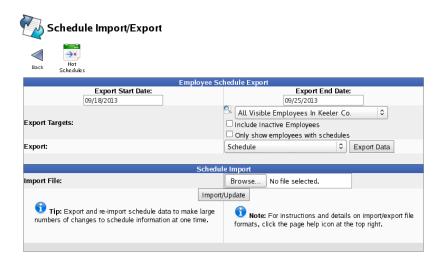
Here we have made a change during week 4. Schedule A still continues to repeat forward as normal, but schedule C is now being repeated forward until its thread is changed again. In this example weeks 7 and 8 (not shown) would follow schedules A and C respectively.

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 <u>OpenOffice.org</u> 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 <u>OpenOffice.org</u> 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

Payroll Type			Pa		
Pavroll Type		ort Payroll Options	Ext		
		, , ,		port Type	
Select a Payroll Type					
			are:	elect Payroll Period to prepa	
In Employees' TZ	In			lect Time Zone	
Prepare Payroll for Exp	Prepar				
Show Hidden Exp	5				
port end Status	Export end	Export start	Comment	Exported on	
		08/11/2013 12:00 AM		08/19/2013 02:18 PM CDT	
12:	08/18/2013 12:		Payroll Type: Direct		

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.

Payroll Format Settings			
Select Format Settings to change: Select an export format to modify with Edit Payroll Export Settings.	Manual	(.csv)	•
	[Edit Payroll Export Sett	ings

Click the + (plus) sign to the left of **Payroll Format Settings** bar to expand the window.
 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.

Export Settings/Comment					
No Presets Found					
"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets defined for the type of export you are attempting to complete, so you must either add or import a preset before you can continue.					
Create a Preset	Import a Preset				
You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.				
Add Preset	Browse No file selected.				
Add Heset	Import Preset				
← Go Back	Continue				

Click the $\boldsymbol{Add}\ \boldsymbol{Preset}$ button to begin setting up a preset for the chosen file type.

Manual (.csv)	
Preset Name:	Manual default
Include column headers	V
Summarize each employee's work hours:	
Line Terminator:	Windows (CR/LF)
Delimiter:	,
Date Format:	YYYY-MM-DD
Name Format:	Last, First Middle 🗘
Save Settings Cancel	

There are several other different options available which vary depending on the file type being created.

 Give the preset a unique Name.
 Make the appropriate selections for your company's needs. 6. Click on the Save Settings button

Export Settings / Comment Export Settings Preset: 0 Keeler Co.: Manual default st select the settings to use for this natively, you can add a new preset, import a new preset, Edit Preset Delete Preset Export Preset or restore a historical copy. Export Comment: Refore calculating payroll for the employees you have selected, blease enter a comment so this set of employees can be identified hen reviewing exported payroll later. ← Go Back Continue

On the next screen be sure that your new preset is the one selected in the Export Settings Preset drop down menu.
 Optionally if you wish to add a comment to the export making it unique and easily identifiable you can do so now.
 Click Continue

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.
- Select a Time Zone. The start and end time o
 Click the Prepare Payroll for Export button.
- Export Payroll Options Export Type Payroll Type ≎ Prepare export with employees from the following type: Direct

Prepare export with employees from the following type:	Direct	•
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM)	•
Select Time Zone	In Employees' TZ	٥
	Prepare Payroll for Expo	ərt

Manual

- Inder Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 Select an **Employee** and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the **Prepare Payroll for Export** button.

	Export Payroll Options	
Export Type	Manual	•
Select employees to include in the export	🔍 All Visible Employees In Keeler Co.	\$
Start Date and End Date	Last Week	•
	From: 09/09/2013 12:00:00 AN	4
	To: 09/16/2013 12:00:00 AN	1
Select Time Zone	In Employees' TZ	2
	Prepare Payroll for Exp	port

Next you should see the payroll calculation being scheduled.

Calculation Status
Data is being calculated for the time period requested. The status is viewable below:
Data calculation scheduled
Force Stop

Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.

Export Payr	oll Options
Export Type	Payroll Type 🗢
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 🗘
Select Time Zone	In Employees' TZ 🗘
	Prepare Payroll for Export
	Show Hidden Exports
Exported on Comment	Export start Export end Status
09/18/2013 04:04 PM CDT Payroll Type: Direct 09/01	1/2013 12:00 AM CDT 09/08/2013 12:00 AM CDT Pending
Exported by Kee	er, Matthew M.
Manual (.csv)	Pending Export You have prepared payroll data to be exported. To download/export the payroll data to your payroll software (such as QuickBooks or ADP), use the "Export Payroll Data" button to the left.
	bout this payroll data.
Invalidate this	Export Hide
Comment: Payroll	Type: Direct
	🔊 Revert Row 🛛 🔚 Save Row
\bigtriangledown	100 🗘

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.

Export	Settings/Comment
No P	resets Found
payroll data is exported to differ	illections of settings that are used to specify how rent payroll programs. Currently there are no presets ou are attempting to complete, so you must either ntinue.
Create a Preset Import a Preset	
You can create a preset from scratch or use template if one is available.	 You can import a preset that you have previously exported from TimeIPS.
Add Preset	Browse No file selected.
Add Treset	Import Preset
← Go B	Back Continue →

Click the $\ensuremath{\textbf{Add}}\xspace$ button to begin setting up a preset for the chosen file type.

	Manual (.e	csv)	
Preset Name:			Manual default
Include column headers			\checkmark
Summarize each employee's work hours:			
Line Terminator:			Windows (CR/LF) 2
Delimiter:			,
Date Format:			YYYY-MM-DD
Name Format:			Last, First Middle
	Save Settings	Cancel	

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.

Export Setting	gs / Comment
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: Manual default
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.	
← Go Back	Continue →

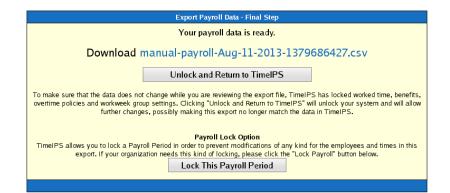
On the next screen be sure that your new preset is the one selected in the Export Settings Preset drop down menu.
 Optionally, you can add a comment to the export making it unique and easily identifiable.
 Click Continue.

Next you should see the payroll calculation being scheduled.

Calculation Status	
Data is being calculated for the time period requested. The status is viewable below:	
Data calculation scheduled	
Force Stop	

Payroll Export Data - Final Step

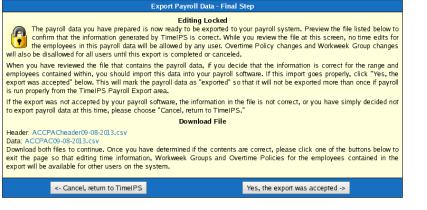
The final step of exporting payroll data is virtually the same regardless of file type chosen, though the window/image may vary.



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:

- 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
۲	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	Х	Х	X	Х
Custom: Audit Detail			New	Х
Ceridian Insync	Х			New

Custom Export			New	x
Creative Solutions Payroll CS	X	Х	Х	Х
Fortune 1000	X	Х	x	×
Great Plains (Custom Preset)				New
Hours Worked Detail (Custom Preset)			New	Х
Hours Worked Summary (Custom Preset)			New	x
Job Detail (Custom Preset)			New	Х
Manual (.csv)	X	Х	Х	Х
MAS90/200 Format 2 (Custom Preset)				New
Paychex 5	X	Х	Х	Х
Paychex Paylink 9	X	Х	Х	Х
Paychex Preview 6.4 (RapidPay)	X	Х	Х	Х
PayChoice (Custom Preset)				New
Paywork	Х	Х	х	Х
PeachTree Complete Accounting				New
PeopleSoft 8	X	Х	Х	Х
Preview-Review (HTML)**	X			
QuickBooks Integration	X	Х	Х	Х
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 5.4 (RapidPay)
 Paychex 6.4 (RapidPay)
 Paychex 9 (Paylink)
 Paychex 9 (Paylink)
 PopuleSoft
 Paywork
 PaopleSoft
 Paywork
 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

⊞		Pa	yroll Format Settings		
		Exp	ort Payroll Options		
Ex	port Type			Pay	roll Type 🗘
Pre	epare export with employees	s from the following ty	pe:	Select a Payrol	ll Type 💲
Se	lect Payroll Period to prepa	re:			
Se	lect Time Zone			In Emplo	yees' TZ 🗘
				Prepare Payro	oll for Export
				Show H	idden Exports
	Exported on	Comment	Export start	Export end	Status
(H)	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
\bigtriangledown					100 \$

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 Manually select employees and a range of time.

Payroll Type

- Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 Select Time Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Export Payroll Option	IS
Export Type	Payroll Type
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌
Select Time Zone	In Employees' TZ 🗢
	Prepare Payroll for Export

Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 Select aritime Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Export Pay	roll Options
Export Type	Manual
Select employees to include in the export	🔍 All Visible Employees In Keeler Co. 🗘
Start Date and End Date	Last Week 🗘
	From: 09/09/2013 12:00:00 AM
	To: 09/16/2013 12:00:00 AM
Select Time Zone	In Employees' TZ 🗘
	Prepare Payroll for Export

	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
Next you should see the payroll calculation being scheduled.	Data calculation scheduled
	Force Stop



	don	Comment	Export start	Export end	Status
09/19/2013 01:2	1 PM CDT	Patty's Payroll	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CDT	Pending
		Expor	ted by Keeler, Matthew M.		
ADF	Export Pa	5.1 🔹	download/export the	Pending Export ared payroll data to be exported. payroll data to your payroll softw. PP), use the 'Export Payroll Data' the left.	are (such
		Mor Inva	ployees included in this export. e details about this payroll data. lidate this Export tt: Patty's Payroll		Hide
				Severt Row	Save Row

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.

Export Settings/Comment		
No Presets Found		
"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets defined for the type of export you are attempting to complete, so you must either add or import a preset before you can continue.		
Create a Preset Import a Preset		
You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.	
Add Preset	Browse No file selected.	
Augriesel	Import Preset	
← Go Back	Continue →	

Click the Add Preset button to begin setup.

The preset window will appear.

ADP				
Preset Name:				
Company Code:				
Batch Number:				
Pay Number:				
Shift Code:	Do not use			
Shift Code Default: If Shift Code is set above, this default will be used when the mapped field is blank or anything other than a single digit between 2 and 9.	Blank 🗢			
Temp Dept:	Job control number			
Suppress TimeIPS Rates: If this option is set to "No" pay rates entered in TimeIPS will be exported in the "Temp Rate" column. Furthermore, if you select one of the "No" options you will need to specify whether you want ADP to calculate overtime rates or TimeIPS. Alternatively you can include rates calculated with custom logic by choosing the Expression option. Select "Yes" if you do not want rates exported.	No - ADP Calculates OT			
Hide Pay Number Column:				
Use Expanded Fields:	\Box Only set this option if your ADP region uses expanded field sizes.			
Coerce Salaried Employee Hours:	□ Set this option to display salaried employee hours as 40			
Limit Shift Time to Worked:	\Box Set this option to apply shift differential time to worked time only			
Show Unpaid Benefits:	□ Set this option to include unpaid benefits.			
Use Tracking Field Mapping:				
Delimiter:	, (For a tab, enter "tab")			
File Number:	Use Alternate Number			
Include OT hours in ST column:	□ Set this option to also include overtime hours in the standard time column.			
Doubletime (doubletime) Field Name: All	Hours 3			
Doubletime Code:				
Premium Time (premiumtime) Field Name: All	Hours 3			
Premium Time Code:				
Holiday (holiday) Field Name: All	Hours 3 0			
Holiday Code:				
Sick (sick) Field Name: <i>Keeler Co.,Seinfeld,Programmers</i>	Hours 3 0			
Sick Code:				
Vacation (vacation) Field Name: Keeler Co.,Seinfeld,Programmers	Hours 3 0			
Vacation Code:				
Piecework Field Name:	Hours 3 🗘			
Piecework Code Source:	P.O. Number			
	Save Settings Cancel			

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 a show a sho

- 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 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 Eigle Name: Define whether recorded as "Hours 3" or "Hours 4" in ADP

- 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.



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.

Calculation Status		
Data is being calculated for the time period requested. The status is viewable below:		
Data calculation scheduled		
Force Stop		

Payroll Export Data - Final Step

	Export Payroll Data - Final Step		
	Your payroll data is ready.		
Download EPI221.csv			
Unlock and Return to TimeIPS			
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.			
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period			

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
٠	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
٠	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
۲	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 \$
\vee					

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 Pay code 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

F	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 multiple 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

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

Payroll Export				
±	Pa	yroll Format Settings		
	Exp	ort Payroll Options		
Export Type			Payr	oll Type 🗘
Prepare export with employee	s from the following ty	pe:	Select a Payrol	l Type ≎
Select Payroll Period to prepa	ire:			
Select Time Zone			In Emplo	yees' TZ 🗘
			Prepare Payro	ll for Export
			Show Hi	dden Exports
Exported on	Comment	Export start	Export end	Status
8/19/2013 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

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.

Export Payroll Options			
Export Type	Payroll Type		
Prepare export with employees from the following type:	Direct		
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 📩		
Select Time Zone	In Employees' TZ 🗢		
	Prepare Payroll for Export		

Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 Select an imme Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Export Payroll Options		
Export Type	Manual	
Select employees to include in the export	🔍 🛛 All Visible Employees In Keeler Co. 🔷	
Start Date and End Date	Last Week 🗘	
	From: 09/09/2013 12:00:00 AM	
	To: 09/16/2013 12:00:00 AM	
Select Time Zone	In Employees' TZ 🗘	
	Prepare Payroll for Export	



Export Payroll

Exported by Keeler, Matthew M. Ceridian Insync Format Export Payroll Data Ceridian Insync Format Export Payroll Data There are 1 employees included in this export.	
Ceridian Insync Format Export Payroll Data You have prepared payroll data to be exported. To download/export the payroll data to your payroll software (such as QuickBooks or ADP), use the 'Export Payroll Data There are 1 employees included in this export.	
You have prepared payroll data to be exported. To download/export the payroll data to be exported. To download/export the payroll data to your payroll software (such as QuickBooks or ADP), use the "Export Payroll Data button to the left.	
Invalidate this Export Hid	
Comment: Patty's Payroll	
ill open.	vill open.

Select Ceridian Insync Format from the drop down menu.
 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.

Enter Ceridian Insync Import File settings	
Preset Name:	My Preset
Company Code:	0001
Save Settings Cancel	

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.

Export Settings / Comment				
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: My Preset			
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset			
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.				
← Go Back	Continue →			
 On the next screen be sure that your new preset is the on 	e 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.

Calculation Status
Data is being calculated for the time period requested. The status is viewable below:
Data calculation scheduled
Force Stop

Payroll Export Data - Final Step

Export Payroll Data - Final Step
Your payroll data is ready.
Download payroll_09-20-2013-1379705401.imp
Unlock and Return to TimeIPS
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period
 Click the blue link to Download the data and open it in a spreadsheet program such as Open Office Calc or Microsof If you have confirmed that the information contained in this export is correct and wish to permanently lock the payro 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 🗘
\vee					

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

In Employees 12 Prepare Payroll for Exp Show Hidden Exp Show Hidden Exp Show Hidden Exp 08/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT Pendid	•	Pa	yroll Format Settings		
Prepare export with employees from the following type: Prepare export with employees from the following type: Select Payroll Period to prepare: In Employees' TZ Prepare Payroll for Exp Prepare Payroll for Exp Show Hidden		Exp	ort Payroll Options		
Select Payroll Period to prepare: Select Time Zone In Employees' TZ Prepare Payroll for Exp Show Hidden Exp 08/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT Pendir	Export Type			Pa	yroll Type 🔇
Select Time Zone In Employees' TZ In Employees' TZ Prepare Payroll for Exp Show Hidden Exp Show Hidden Exp 08/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT Pendid 08/18/2013 12:00 AM CDT Pendid	Prepare export with employees	s from the following ty	pe:	Select a Payro	oll Type 🗘
Exported on Comment Export start Export end Start 108/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT Pendir	Select Payroll Period to prepa	re:			
Exported on Comment Export start Export end Start 08/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT 08/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT 08/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT Payroll Type: Direct 08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT 	Select Time Zone			In Employees' TZ ♀	
Lexported on Comment Export start Export end Start 08/19/2013 02:18 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT Pendir				Prepare Pay	roll for Expor
🖲 08/19/2013 02:18 PM CDT 🛛 Payroll Type: Direct 🛛 08/11/2013 12:00 AM CDT 🔄 08/18/2013 12:00 AM CDT 🔗 Pendir				Show I	Hidden Expoi
	Exported on	Comment	Export start	Export end	Status
8/19/2013 02 17 PM CDT Payroll Type: Direct 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT Invalida	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	Invalidate
					100

Before you export: • A 4-digit <u>Alternate Number</u> must be assigned to each employee. • A 2-digit numeric <u>Department Code</u> 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

الحكم

- Inder Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.

In Employees' TZ 🌣 Prepare Payroll for Export

Click the Prepare Payroll for Export button.		
Export Payroll Option	ns	
Export Type	Payro	oll Type 🗘
Prepare export with employees from the following type:	Direct	-
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:	:00 AM) 🗾

Select Time Zone

Manual

- 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.

EX	port Payroll Options
Export Type	Manual
Select employees to include in the export	All Visible Employees In Keeler Co.
Start Date and End Date	Last Week 🗘
	From: 09/09/2013 12:00:00 AM
	To: 09/16/2013 12:00:00 AM
Select Time Zone	In Employees' TZ 🗘
	Prepare Payroll for Export

	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
Next you should see the payroll calculation being scheduled.	Data calculation scheduled
	Force Stop

Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.

Exported on	Comment		Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2	013 12:00 AM CDT	09/20/2013 12:00 AM	CDT Pending
	Export	ed by Kee	eler, Matthew M.		
Creative Solution Export P	ns Payroll CS 💽		download/export t	Pending Export ared payroll data to be exp he payroll data to your pay ks or ADP), use the 'Expor button to the left.	roll software
	1 More	idate this			Hide
				Revert Row	🔒 Save Row
Select Creative Solutions Next click on the button lab			wn menu.		

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.

Enter Creative Solution	ons PayrollCS settings
Preset Name:	creative preset
Wage Code C	Configuration:
Wage Code for Standardtime:	1
Wage Code for Overtime:	2
Wage Code for Doubletime:	3
Wage Code for Premium Time:	4
Wage Code for Holiday:	5
Wage Code for Piecework:	6
Wage Code for Sick:	7
Wage Code for Vacation:	8
Save Settin	gs Cancel

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.

Export Setting	js / Comment
Export Settings Preset: Before calculating payroll, you must select the settings to use for this export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Keeler Co.: My Preset Edit Preset Delete Preset Export Preset
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.	
← Go Back	Continue →
1 On the next screen he sure that your new preset is the on	e 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.

Calculation Status	
Data is being calculated for the time period requested. The status is viewable below:	
Data calculation scheduled	
Force Stop	

Payroll Export Data - Final Step

Export Payroll Data - Final Step
Your payroll data is ready.
Download PayrollCS-1380557036.tci
Unlock and Return to TimeIPS
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period
 Click the blue link to Download the data and open it in a spreadsheet program such as Open Office Calc or Microsof If you have confirmed that the information contained in this export is correct and wish to permanently lock the payro 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
۲	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 \$
\sim					

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

	Payroll Export				
•		Pa	yroll Format Settings		
		Exp	ort Payroll Options		
Ex	port Type			Payr	oll Type 🗘
Pre	pare export with employee	Select a Payroll Type 🗘			
Se	ect Payroll Period to prepa	re:			•
Select Time Zone			In Employees' TZ 🗢		
				Prepare Payro	II for Export
				Show Hi	dden Exports
	Exported on	Comment	Export start	Export end	Status
+	08/19/2013 02:18 PM CDT 08/19/2013 02:17 PM CDT	Payroll Type: Direct Payroll Type: Direct	08/11/2013 12:00 AM CDT 08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT	Pending Invalidated
\bigtriangledown					100 \$

For Custom Report:

Using the left pane Main Menu » Administration, click on: Reports » Custom Report

Custom Repo	rt Tool Settings
Keeler, Ma	s presets for this page: atthew M. Selected Delete Preset
Select Date Range Manually select a range of time for this report, or use the quick selection. Select Employee or Group	Today \$ From: 09/30/2013 12:00:00 AM To: 10/01/2013 12:00:00 AM In Employees' TZ \$
Select a group or a single employee to run this report for.	All Visible Employees In Keeler Co.
Export Settings: Before processing this report, you must select the settings to be used in generating it. Alternatively, you can add new settings , import new settings, or restore a historical copy.	Global: Custom Transit Report 🗘 Edit Preset Delete Preset Export Preset
Run F	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.

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 file that can the mapped as the "Emp Division". This "Employee is that can and be mapped as the "Emp Division." In this example.							
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 Manually select employees and a range of time.

Payroll Type

- Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.
 Click the Prepare Payroll for Export button.

Export Payroll Options				
Export Type	Payroll Type 🗢			
Prepare export with employees from the following type:	Direct			
Select Payroll Period to prepare: Sep 01, 2013 to Sep 08, 2013 (12:00 AM)				
Select Time Zone	In Employees' TZ 🗢			
	Prepare Payroll for Export			

Manual

- Manual
 Inder Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.) Select employees and a range of time.
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 Select an employee. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Expoi	rt Payroll Options
Export Type	Manual
Select employees to include in the export	🔍 All Visible Employees In Keeler Co. 🔷
Start Date and End Date	Last Week 🗘
	From: 09/09/2013 12:00:00 AM
	To: 09/16/2013 12:00:00 AM
Select Time Zone	In Employees' TZ
	Prepare Payroll for Export

Next you should see the payroll calculation being scheduled.	Calculation Status		
	Data is being calculated for the time period requested. The status is viewable below:		
	Data calculation scheduled		
	Force Stop		

Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.

	Exported on	Comment		Export start		Export end S				
	09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/20	013 12:00 AM CDT	09/20/201	3 12:00 AM CDT	Pending			
		Export	ed by Kee	ler, Matthew M.						
	Custom	▼ Payroll Data		You have prep download/export t (such as QuickBoo	he payroll da	data to be exporte ata to your payroll : ise the 'Export Pay	software			
	There are 1 employees included in this export. More details about this payroll data.									
		Inva	lidate this	Export			Hide			
		Commen	t: Patty's	Payroll						
					S Re	evert Row 🔒	Save Row			
•	09/18/2013 04:04 PM CDT	Payroll Type: Direct		013 12:00 AM CDT		3 12:00 AM CDT				
	08/19/2013 02:18 PM CDT	Payroll Type: Direct		13 12:00 AM CDT		3 12:00 AM CDT				
•	08/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/20	013 12:00 AM CDT	08/18/201	3 12:00 AM CDT				
\bigtriangledown							100 0			
	1. Select Custom from the	drop down menu.								

Select Custom nom the drop down mend.
 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.

Expo	Export Settings/Comment								
No	No Presets Found								
"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets defined for the type of export you are attempting to complete, so you must either add or import a preset before you can continue.									
Create a Preset	Import a Preset								
You can create a preset from scratch or u template if one is available.	ise a You can import a preset that you have previously exported from TimeIPS.								
Add Preset	Browse No file selected. Import Preset								
⊢ G	o Back Continue →								

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.

	c	ustom Payroll	Export Settin	gs		
Preset Name:	Custom Transit Report					
Visibility:	Global Preset 🔷]				
General Pay Co	odes Preamble	Columns	Footer	Subtotals	Parameters	Styles
Terminator," "Field Deli Some payroll software	and spreadsheets) use ' miter," and "Text Wrapp expects data at specific rs," set "Field Delimiter"	er." : locations, that	is, "fixed widtl	n" data. If this th		
Include Column Head	ers					🗹 Include
Line Terminator					Window	vs (CR/LF) 🗘
Field Delimiter						,
Text Wrapper					Doube Quo	te('') 🗘
Date Format					YYYY-M	M-DD 🗘
Time Format					HH:	1M:SS 🗘
File Name						
File Extension						CSV
Page Orientation						\$
Page Size						•
Export Employees Wit	h No Events					Export
Export Unpaid Benefit	Time					Export
Export Future Schedu	led Time					Export
Do Not Break Time On	Calendar Days					Do Not Break
Show Schedule Violat	ions				🗆 sł	now Violations
Append to End of this	Report					None 🗘
Page Break At End of	Report					Page Break
Run Report(s) For					Everything	0
Page Break After Each	Entity					Page Break
Allow This Report To I	Be Sent By E-mail					Enable E-mail
Default E-mail Addres	s					
Default E-mail Subject						
Default E-mail Body						
Report Style					N	lo Style 🗘
	Save a Historical co	py of these pre	eset changes	Save Settings	Cancel	

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.

- Choose one of "xis", "xisx", "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 Impid Benefit** 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 the sting 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. 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 merset you create (such as this is on). NOTE: Since merced drops' how to preve here that you want to be followed by a more detailed report. NOTE: The drop down menu will contain the titles of each Custom preser you create (such as this is on).
- 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.

		Custom Payroll	Export Setti	ngs				
Preset Name:	Custom Transit Re	port						
Visibility:	Global Preset	•						
General Pay Co	des Preamble	Columns	Footer	Subtotals	Parameters	Styles		
Pay codes are used to provide a number or value used by payroll software to designate specific types of pay or benefits. To use pay codes, select Pay Code in the <i>Data</i> field of the column configuration, under the Columns tab. Check the "Exclude from Report" box to exclude all time for that pay code from the report.								
Pay Code for Standardtir	me (standardtime):	1			Exclude from re	port: 🗆		
Pay Code for Overtime (overtime):	2			Exclude from re	eport: 🗆		
Pay Code for Doubletime	(doubletime):	3			Exclude from re	port: 🗆		
Pay Code for Premium T (premiumtime):	ïme	4			Exclude from re	port: 🗆		
Pay Code for Holiday (ho	oliday):	5			Exclude from re	port: 🗆		
Pay Code for Piecework	Pay Code for Piecework (piecework):				Exclude from re	port: 🗆		
Pay Code for Sick (sick)	7			Exclude from re	port: 🗆			
Pay Code for Vacation (v	acation):	8			Exclude from re	port: 🗆		
	Save a Historica	l copy of these pre	eset changes	Save Settings	Cancel			

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"

	Custom Payroll Export Settings								
Preset Name:		Custom	n Transit Repor	t					
Visibility:		Globa	l Preset ≎						
General	Pay Co	ies 🛛	Preamble	Columns	Footer	Subtotals	Parameters	Styles	
<i>The Preamble i</i> Preamble usage	The Preamble is an optional single line at the top of the exported file, above or below the headers (if used). Preamble usage: Do Not Use Do Not Use								
Number of Colu	mns:	2							
Delete Column(s):		(Sing	le value or com	ma separated lis	st, like 5 or 5,7,8)		
Apply									
	Preamble Columns								
		Save a	a Historical co	py of these pre	eset changes 🧧	Save Settings	Cancel		

NOTE: Most payroll applications do not require a preamble.

• To add a Preamble, enter the Number of Columns and click the Apply button.

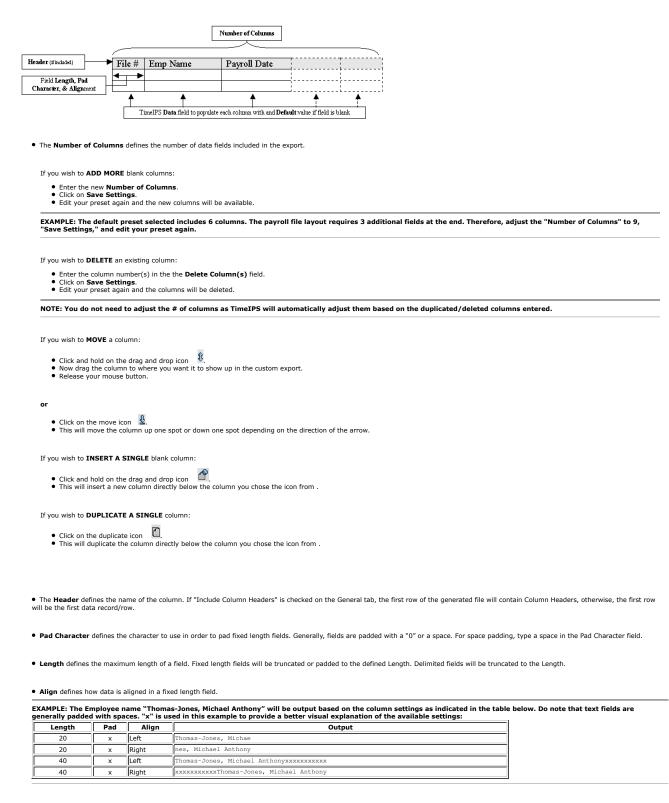
	Preamble Columns				
🗏 1 (A)	Export Range Start Date/Time	•	\$ 🕂	\square	7
Default or Expression					
Data Style			No 5	tyle	\$
Advanced Formatting					
Padding Character, Length, and Alignm	lent		X 5	Righ	it 🗘
😬 2 (B)	Use Default	•	\$ ÷	0 👗	
🗹 Save a Historic	al copy of these preset changes	Save Settings Can	icel		

- 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.)
- 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 T.
- In 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 <u>TimeIPS Knowledge Base</u>.
 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.

			Cı	istom Payroll	Export Settin	gs				
Preset Nam	e:	Custom	ı Transit Report							
Visibility:		Globa	l Preset 🔷 🗘							
General	Pay Co	les	Preamble	Columns	Footer	Subtotals	Parameters	Styles		
	Nost payroll software (and spreadsheets) use "comma separated" data. If this is the case for you, leave "Pad Length" and Pad Character" empty for each field.									
	The Default can be used for a spreadsheet formula. Use [row] to get the current row number. <u>Example</u> : To sum columns D-I, set "Data:" to "Default" and in the "Default" field, enter: =sum(D[row]:i[row])									
[More Help]										
	Number of Columns: 7									
Delete Colu	mn(s):		(Single			ist, like 5 or 5,7,8	3)			
				Ap						
				Exported						
Column	-	er	.		Data		Sort	Controls		
1 (A)	Employee		Employee La	st, First Mid		\$	○	\$ 🕂 🗇 🍸		
😬 2 (B)	SSN		Employee SS	N		0	•	🔅 🕂 🗋 👗 🍸		
🖲 3 (C)	Time In		Clock In Paid	Clock In Paid Date/Time				\$ 🕂 🗇 👗 🍸		
ط (D)	Time Out		Clock Out Pa	aid Date/Time		0		🎗 🕂 🗋 👗 🍸		
🖮 5 (E)	Duration		Payable Time	e (Total) Dura	tion Decimal I	lours 0		\$ 🕂 🗇 👗 🍸		
😬 6 (F) Pay Type			Pay Type (O	T/DT/Sick etc	.)	٥)	🎗 🕂 🗋 👗 🍸		
۰ 7 (G)	Custom Fiel	d	bike transit			0		\$ 🕂 🗇 👗		
	V	Save a	u Historical cop	y of these pre	set changes	Save Settings	Cancel			



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	0/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	0/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, overrides, etc.
- 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
- 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 Houry Rate: This is the FLSA Weekly Base Houry 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.

				Custom Payroll	Export Setti	ngs			
Preset Name: Custom Transit Report									
Visibility:			bal Preset 🗘	-					
General Pay Codes			Preamble	Columns	Footer	Subtotals	Parameters	Styles	
The Footer is al Footer usage:	he Footer is an optional single line at the bottom of the exported file. poter usage: Do Not Use 🗘								
Number of Colu	mns:		0						
Delete Column(Delete Column(s): (Single value or comma separated list, like 5 or 5,7,8)								
	Apply								
				Footer (Columns				

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".

	Footer Columns		
🗏 1 (A)	Current Date/Time	•	\$ 🕂 🗇
Default or Expression			
			.:!
Data Style			No Style 🗘
Advanced Formatting			
Padding Character, Length, and Alignm	ent		X 5 Right 🗘
Save a Historica	I copy of these preset cha	nges Save Settings	Cancel

• Click the + (plus) sign to the left of the column number to expand the window.

- To insert a new column after this one, click the green plus sign $_{4}$.
- 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

If the value of Data is blank and set to Default, then the report uses the value 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 <u>TimeIPS Knowledge Base</u>.
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.

Custom Payroll Export Settings									
Preset Name: Custom Transit Report									
Visibility:		Globa	al Preset 🗘						
General	Pay Cod	cs	Preamble	Columns	Footer	Subtotals	Parameters	Styles	
should be insert The <i>Summary I</i> For each subtot Any instance of	Use this interface to insert subtotal rows. The <i>Trigger on changes in column</i> setting is used to specify when each subtotal row should be inserted. <i>Be sure to set the Sort Order option on the Columns tab for any subtotaled column</i> . The <i>Summary Name</i> is inserted as a new column at the end of the subtotal row. For each subtotal row, a <i>mode</i> can be specified for each column - this determines the value for that column in this subtotal row. Any instance of <i>[row]</i> will be replaced by the row number.								
Number of Sub	total Trigge	rs:	0						
				Ap	ply				
				Subtotal	Triggers				

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.

		Subtotal Triggers		
	Column	Filter By Expressior	n Mode	Format*
	1 (A) [Employee]			
	2 (B) [SSN]			
	3 (C) [Time In]			
	4 (D) [Time Out]			
	5 (E) [Duration]		Sum 🔻	%0.2f hours for %s
Trigger on changes in column	6 (F) [Pay Type]			
6 (F)	7 (G) [Custom Field]			
Summary Name*	Column			Style
Pay Type	1 (A) [Employee]			No Style 🗘
Summary Name Style No Style 🗘	2 (B) [SSN]			No Style 🗘
Delete this trigger	3 (C) [Time In]			No Style 🗘
	4 (D) [Time Out]			No Style 🗘
	5 (E) [Duration]			No Style 🗘
	6 (F) [Pay Type]			No Style 🗘
	7 (G) [Custom Field]			No Style 🗘
☑ Sa	we a Historical copy of	these preset changes	Save Settings	Cancel

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 <u>advanced formatting</u> 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 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.
 Mode allows you to choose a set of values,
 Mean is the arithmetic average of a set of values,
 Media is the arithmetic average of a set of values,
 Media is the arithmetic average to the sume to pay the lower half.

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 <u>advanced formating</u>.
 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.

	Custom Payroll Export Settings							
Preset Name:		Custom Transit Report						
Visibility:		Globa	Global Preset					
General	Pay Cod	es	Preamble	Columns	Footer	Subtotals	Parameters	Styles
Extra paramete through express						a to a custom re	port. These can	be accessed
Number of Extr	Number of Extra Parameters: 0							
	Apply							
		Extra Parameters						

Type in the the Number of Extra Parameters you would like to add.
Click the Apply button and the Extra Parameters window will expand.

		Extra Parameters	
Parameter #1	Name Job Code	Default Value	Description ort to only time on that job
Parameter #2	Name Department Code	Default Value	Description the data to a particular de
	🗹 Save a Historical copy	of these preset changes	Save Settings Cancel

• 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					
C	Custom Report Tool Settings	s			
Select	an employee's presets for this Keeler, Matthew M. 😂				
ſ	No Preset Selected 🗘]			
	Save Preset Delete Preset				
Select Date Range	Today				\$
		Fr	om: 10/02/2013	12:00:00 AM	_
			To: 10/03/2013	12:00:00 AM	_
			In Em	ployees' TZ	٥
Select Employee or Group	A 🔊	All Visible Empl	oyees In Keeler	Co.	٥
Export Settings: Before processing this report, you must select the se			al: Custom Tra		_
used in generating it. Alternatively, you can add nev import new settings, or restore a historical copy.	v settings ,	Edit Preset	Delete Preset	Export Pres	et
Extra Pa	rameters for Custom Transi	it Report			
Job Code 1000	Department Code				
	Run 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".

Custom Payroll Export Settings								
Preset Name:		Custo	om Transit Repor	t				
Visibility:		Glob	oal Preset 🗘	:				
General	Pay Co	les	Preamble	Columns	Footer	Subtotals	Parameters	Styles
Columns are lin	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.							
Number of Style	es:							
				Ap	ply			
				Sty	les			

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.

Styles			
Style #1 Name Duration Subtotal			Priority
Text: Bold		Bold	• 0
Text: Underlined			
Text. Undermied			0
Text: Italics			٥
Text: Color			
			0
Text: Font			0 C
Text: Font Size			0
	_		
Text: Alignment			0
Cell: Color		Aqua	- 0
		Indag	
Cell: Width			0
Cell: Merged Width			
Cen: Merged width			0
Borders: Top Style			0
Borders: Top Color			0
Borders: Right Style			0
Borders: Right Color			0
-			•
Borders: Bottom Style			0
Borders: Bottom Color			0
Borders: Left Style			© 0
			v 0
Borders: Left Color			0
☑ Save a Historical copy of these preset changes S	ave Settings	Cancel	

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.

Export Settings / Comment						
Export Settings Preset: Before calculating payroll, you must select the settings to use for this export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Keeler Co.: My Preset Edit Preset Delete Preset Export Preset					
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.						
← Go Back	Continue →					

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.



Payroll Export Data - Final Step

Export Payroll Data - Final Step
Your payroll data is ready.
Download custom-payroll-Sep-19-2013-1380572848.csv
Unlock and Return to TimelPS
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period
 Click the blue link to Download the data and open it in a spreadsheet program such as Open Office Calc or Microsof If you have confirmed that the information contained in this export is correct and wish to permanently lock the payro

Excel. 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

 - O 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 are related.
 - 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
 - O 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 tab character can be specified with a \n A return character can be specified with a \

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

- For 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 expression]
 - -summarizeExpression-
- Esummarized 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" (<i>if x is</i> -2)
round(<i>number</i> [, <i>precision</i>])	Returns the number rounded to decimal points specified in <i>precision</i> . 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(<i>number</i>)	Returns the largest whole number less than <i>number</i> (rounds down). You may also use FLOOR() instead of floor().	floor(2.3)	2
ceil(<i>number</i>)	Returns the smallest whole number greater than <i>number</i> (rounds up). You may also use CEIL() instead of ceil().	ceil(2.3)	3
empty(<i>variable</i>)	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(<i>x</i> , <i>y</i>)	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(<i>subject, start, length</i>)	Returns <i>length</i> characters out of <i>subject</i> starting at <i>start</i> . Note that the first character is 0, not 1.	substr("abcd", 1, 2)	"bc"
stristr(<i>haystack, needle</i>)	Returns all of <i>haystack</i> from first occurrence of <i>needle</i> to the end. Case insensitive.	stristr("abcdefg", "cd")	"cdefg"
strstr(haystack, needle)	Returns all of <i>haystack</i> from first occurrence of <i>needle</i> to the end. Case sensitive.	strstr("abcdefg", "cd")	"cdefg"
stripos(haystack, needle, search_start_position)	Returns the numeric position of the first occurrence of <i>needle</i> in <i>haystack</i> starting at <i>search_start_position</i> . 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 <i>needle</i> in <i>haystack</i> starting at <i>search_start_position</i> . Case sensitive. Needle may be one or more characters. Search_start_position is optional.	strpos("abcd abcd", "bc", 4)	"6"
strlen(<i>text</i>)	Returns the numeric length of text	strlen("abcd")	"4"
substr_count(<i>haystack, needle</i> [<i>,offset</i>] [<i>,lengt</i> h])	Returns the number of occurences of <i>needle</i> in <i>haystack</i> . 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(<i>string</i>)	Returns the upper case version of a string	strtoupper("aBcD")	"ABCD"
getfield(<i>text,start_marker,end_marker</i>)	Returns the section of <i>text</i> between <i>start_marker,end_marker</i> . Case insensitive.	getfield("\$abcd~^efgh~","\$","~")	"abcd"

	Detune the earlier of tout hefers an often the first second of deliverity	Γ	
splitfield(<i>text,delimiter</i> [, <i>after</i>])	Returns the section of <i>text</i> before or after the first occurence of <i>delimiter</i> . Optionally, set <i>after</i> 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 <i>needle</i> is found in the list of items passed in as <i>haystack</i> . Any number of items can be passed in after the <i>needle</i> to make up the <i>haystack</i> . 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 <u>PHP's</u> <u>date() function</u>) 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(<i>employeeID</i> , <i>timestamp</i> , 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", "begi," "beginin," 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 <u>PHP's sprintf()</u> <u>function</u>).	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 <i>clockType</i> (either "in" or "out") for the employee with <i>usersID</i> that occurs between <i>startTimeStamp</i> and <i>endTimeStamp</i> 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(<i>position ,startTimeStamp,</i> 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 <i>format</i> time (or timestamp if not specified) of the schedule point specified by <i>schedulePoint</i> (either "firstin" "firstout" "secondin" or "secondout") for the employee with <i>usersID</i> that occurs on the calendar day that includes the timestamp <i>dayOTimestamp</i> in the employees time zone. In the example, the timestamp of the first scheduled clockin time will be returned for the employee on the row. If oschedule 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(<i>employeeID</i> , timestamp, [honorGracePeriods])	Look at an employees worked time and schedule for the day including <i>timestamp</i> 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 <i>honorGracePeriods</i> 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(<i>employeeID</i> , <i>begTimestamp</i> , <i>endTimestamp</i>)	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(<i>begin,day,</i> 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 what break is not specified, it is considered "0000" or midnight. If usersID is not specified, it is considered "0000" or midnight. If usersID is not specified, it is considered 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(<i>usersID</i> [<i>,startTimeStamp</i>][<i>,</i> <i>endTimeStamp</i>])	Returns the number of seconds of worked time between the <i>startTimeStamp</i> and <i>endTimeStamp</i> . If set to 0 or left blank, startTimeStamp and endTimeStamp are considered unbounded.	findWorkedTime([usersID],0,0)	"86400"
findWorkweekInfo(<i>usersID, timestamp,</i> 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(<i>field</i> [, <i>column</i>][, <i>forClockIn</i>])	Returns the desired information for the tracking field specified by <i>field</i> . <i>field</i> 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 <i>forClockIn</i> to gather the tracking field value from either the clock in or clock lout 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 <i>field</i> . <i>field</i> is the name such as "Mileage"	pieceworkField("Mileage")	"24354"
. (dot)	Joins two results or strings together.	"First: ".[nameFirst]	"First: Bob"
updateEmployeeCustomField(<i>field, value,</i> [<i>output</i>])	This function will update the appropriate custom employee field with the given value. In addition, this function will return <i>output</i> , or if <i>output</i> has not specified, it will return <i>value</i> .	updateEmployeeCustomField("testing", "17", "16")	"16" (And the custom field testing is set to 17)

getJobIDByName(<i>name</i>)	Returns the unique database jobID for the named job in the context of the current employee.	getJobIDByName("Lunch")	1
getUserSalaryRateAtTime(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 Job this function will return a string of data about a Work Order Job this function will return a string of data about a Work Order Job this function will return a string of data about a Work Order Job this function will return a string of data about a Work Order Job this function will return a string of data about a Work Order Job the Work Order Job by that name. If segmentName is blank then the first Segment alphabetically is used. The argument formats worked hours or percentage of budget worked. The argument formats 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-htHi} The budgeted hours for the segment, expressed in HH:MM:SS format. Will be "N/A" if there is no budget. {budgeted-hours-fit.Hi} The budgeted hours for the segment, expressed in seconds. {be "N/A" if there is no budget. {bours-worked-seconds} The number of hours worked in the segment, expressed in seconds. {be "N/A" if there is no budget. {bours-worked-seconds} The number of hours worked in the segment, expressed in seconds. {bours-worked-HH.HH} The number of hours worked in the segment, expressed in H.HH format. {be recentage} The number of hours worked in the segment, expressed in H.HH format. {percentage} The percentage} functional worked. Will be "N/A" if there is no budget. {bours-worked-HH.HH} The number of hours worked in the segment, expressed in H.HH format. {percentage} The percentage of the budget worked. Will be "N/A" if there is no budget. {bours-worked-HH.HH} The number of hours worked in the segment, expressed in H.HH format. {percentage} The perchange of the budget worked. Will be "N/A" if t	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

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 ra = active, 0 = Inactive, eligible for rehire, -1 = Inactive 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
cidInNumber	only)
	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)
	Caller ID name of phone used to clock-out (telephone clock
cidOutName	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_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	
realDuration	provide "occurs + duration" Number of seconds between realTimeIn and realTimeOut if	
realOrPaidDuration	neither are null Number of seconds between realOrPaidTimeIn and	
	realOrPaidTimeOut Payable time start (timestamp) - includes splits for day,	
occurs	type of pay change, etc. Payable time end (timestamp) - includes splits for day, type	
endoccurs	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 payroll report range end timestamp	
endTimestamp		
begTimestamp	payroll report range beginning timestamp Payable Hourly Rate (base, no modifiers) - Employee's Base	
reg_hourly_rate	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.	
	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 applicab For FLSA compliance, when in OT/DT/PT, this amount is least the Payable FLSA Weekly Base Hourly Rate times th	
pay_per_hour	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	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week.	
base_rate net_pay	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event	
base_rate net_pay hourly_rate	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null)	
base_rate net_pay hourly_rate hourly_differential	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override differential (can be null)	
base_rate net_pay hourly_rate hourly_differential	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override differential (can be null) Override rate multiplier (can be null)	
base_rate net_pay hourly_rate hourly_differential rate_multiplier payroll_event_type_name	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override differential (can be null) Override rate multiplier (can be null) Override pay type name, i.e. Overtime, Sick, etc. (can be null)	
base_rate net_pay hourly_rate hourly_differential rate_multiplier payroll_event_type_name	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override rate (can be null) Override rate multiplier (can be null) Override pay type name, i.e. Overtime, Sick, etc. (can be null) Override counts-toward-overtime (can be null)	
base_rate net_pay hourly_rate hourly_differential rate_multiplier payroll_event_type_name counts_toward_overtime	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override differential (can be null) Override rate multiplier (can be null) Override pay type name, i.e. Overtime, Sick, etc. (can be null)	
base_rate net_pay hourly_rate hourly_differential rate_multiplier payroll_event_type_name counts_toward_overtime event_note	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override differential (can be null) Override rate multiplier (can be null) Override pay type name, i.e. Overtime, Sick, etc. (can be null) Override counts-toward-overtime (can be null) Payroll engine notes on splits, benefits and misc (can be null) Payroll engine notes on pay and overtime (can be null)	
pay_per_hour base_rate net_pay hourly_rate hourly_differential rate_multiplier payroll_event_type_name counts_toward_overtime event_note event_note pay holiday_name	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override rate (can be null) Override rate multiplier (can be null) Override rate multiplier (can be null) Override pay type name, i.e. Overtime, Sick, etc. (can be null) Override counts-toward-overtime (can be null) Payroll engine notes on splits, benefits and misc (can be null)	
base_rate net_pay hourly_rate hourly_differential rate_multiplier payroll_event_type_name counts_toward_overtime event_note event_note event_note_pay holiday_name	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override differential (can be null) Override rate multiplier (can be null) Override pay type name, i.e. Overtime, Sick, etc. (can be null) Override counts-toward-overtime (can be null) Payroll engine notes on splits, benefits and misc (can be null) Holiday Name, only set for actual holiday hours (can be	
base_rate net_pay hourly_rate hourly_differential rate_multiplier payroll_event_type_name counts_toward_overtime event_note event_note event_note_pay	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. Payable FLSA Weekly Base Hourly Rate - FLSA Weekly Base Hourly Rate used to figure OT/DT minimums for the entire week. Total net dollar amount pay for event Override rate (can be null) Override rate multiplier (can be null) Override rate multiplier (can be null) Override rate multiplier (can be null) Override counts-toward-overtime, Sick, etc. (can be null) Override counts-toward-overtime (can be null) Payroll engine notes on splits, benefits and misc (can be null) Holiday Name, only set for actual holiday hours (can be null)	

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</your>	The Code of the specified allocation code		
AllocationCode <your code="" name=""> amount</your>	The Amount of the specified allocation code		
AllocationCode <your code="" name=""> note</your>	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=""></your>	The value of the piecework field for the event. <your field="" name=""> is all lower case with spaces removed.</your>		
deptCode	Department code on the time event.		
departmentName	Department name on the time event.		
custom_ <your fierd="" name=""></your>	The value of the custom employee field. <your field="" name=""> is all lower case with spaces removed, mating your custom field name.</your>		

Variables available for expressions in the "Preamble" and "Footer" tabs:

Variable	Description			
rowcount	Rows in the report			
comment	teport 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: <u>Custom Fields and Data</u> Expression Variables for Custom Report / Custom Payroll Export Supported Functions for Advanced Expressions Expression Variables for Custom Report / Custom Payroll Export

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.

	Custom Data		
	🔺 Custom Field Key Name	Custom Field Value Name	Custom Field Note
			100 0
\bigtriangledown			
	Custom Field Key Name	Custom Field Value Name	Custom Field Note
			Add Field

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."

Custom Field Key Name	Custom Field Value Name	Custom Field Note
	Custom Pretu Varue Ivame	
Custom Field Key Name	Custom Field Value Name	Custom Field Note
Employee Name	Certification Level	Service Employees: Add Field
 Click the Add Field button to 	save the entry.	
▲ Custom Field Key Name	Custom Field Value Name Cu	stom Field Note
	Eaprica	
Employee Name		Employees: 🔄 Enter Data 🔚 💥
\bigtriangledown		100 \$
Custom Field Key Name	Custom Field Value Name	Custom Field Note
		Add Field

To **edit** an exising field, update the text and then click the floppy disk icon \blacksquare to **save**. Click the red **X** icon **X** 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.

Employee Name	Certification Level — Service Emplo: Certification Level	yees: Process Certification Level Custom Field Note	
John Smith	4	Certified for 3 years	
Dave Jones	3	ail	
7			100
Employee Name	Certification Level	Note	
Mark Jones	6	Lifetime Certification	Add Da

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 **i** to **save**. Click the red **X** icon **X** to **delete** a custom data entry.

To **Go Back** to the Custom Fields page, click the blue arrow icon $\begin{tabular}{c} $Go Back$ at the top of the page. \end{tabular}$

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



For more detailed instructions on creating custom reporting presets, see the Custom Reporting/Payroll Export Settings article.

\chi Custom Report

Custom (.csv, .txt, etc)

Instructions:

- Custom payroll export produces a text file with payroll data where each row corresponds to a period of worked (or benefit) time and columns can be configured to show information related to that time.
 To configure custom payroll, use the tabs below and read the help contained within each tab for instructions.
- · For additional details, please visit our support website

	Custom Payroll Export Settings										
Preset Na	me:	Custom Transit Report									
Visibility: Global Preset											
Genera	I Pay Coo	es	Preamble	Columns	Footer	Subtotals		Paramete	215	Sty	le s
Most payroll software (and spreadsheets) use "comma separated" data. If this is the case for you, leave "Pad Length" and "Pad Character" empty for each field. The Default can be used for a spreadsheet formula. Use [row] to get the current row number.											
<u>Example</u> :	To sum column	s D-I, s€	et "Data:" to "Def	ault" and in th	ne "Default" fi	eld, enter: =sur	n(D[row]:I[row];)		
[More Help]										
Number of	Columns:	7									
Delete Col	umn(s):		(Single	value or com	ma separated	list, like 5 or 5	,7,8))			
				Ap	ply						
				Exported	Columns						
Colum	in Head	er -			Data		_	Sor		Contro	ols
۱ (A)	Employee		Employee Las	Employee Last, First Mid			0	:	<u>۽</u> ا	; 🕂 🗊	- 💎
ط 2 (B)	SSN		Employee SSN				٥	:) (+ 🗇	å 🍸
🖮 3 (C)	Time In		Clock In Paid	Date/Time			٥	:	្ រុំ	+ 🗊	4 7
± 4 (D)	Time Out		Clock Out Pai	d Date/Time	2		٢	:) (;+ 🗇	å 🍸
🖮 5 (E)	Duration		Payable Time (Total) Duration Decimal Hours			:	C 1	+ 🗊	å 🍸		
🖲 6 (F)	Pay Type		Pay Type (OT	/DT/Sick etc	z.)		٥	:)	•	<u>i</u> 7
🖮 7 (G)	Custom Fiel	ł	bike transit	bike transit				+ 🗇	*		
	V	Save a	a Historical copy	of these pre	eset changes	Save Setting	s	Cancel			

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).)

		Exported Columns				
Column	Header	Data		Sort	Contro	ls
🗏 1 (A)	Employee	Expression (in Default)	-	•	\$ 🕂 🔘	7
Default or	Expression	Work Week End Timestamp	~			
		Extra Parameters				
		Parameter: Job Code				
Header Sty	/le	Parameter: Department Code		No.	Style	0
		Custom Fields		110	styte	
		bike transit				_
Data Style		This Report		No :	Style	0
		Export Range Start Date/Time				
Clear Duplicates		Export Range Start Date			Clear Duplic	ates
	C 1	Export Range Start Time		_	ciear Dupire	
Summarize Column		Export Range Start Timestamp				0
Note		Export Range End Date/Time				
		Export Range End Date				
		Export Range End Time				
		Export Range End Timestamp				
		Special				í
Advanced	Formatting	Expression (in Default)				
Padding C	haracter, Length, a	uc Use Default				
	·····, -···j···, -	True	Special fun	ctions and	set values	sĽ
😬 2 (B)	SSN	False	Ľ	\$	t 🕂 🗇 🗸	. 🕈

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

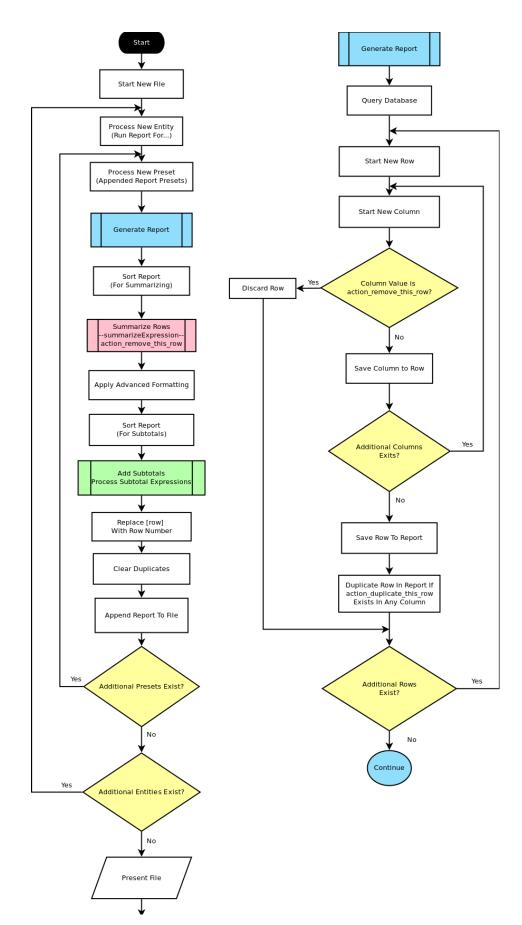
Volt e-Time Preset

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.



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

Payroll Export						
•	Pa	yroll Format Settings				
Export Payroll Options						
Export Type			Pay	roll Type 🗘		
Prepare export with employee	s from the following ty	/pe:	Select a Payro	ll Type 🗘		
Select Payroll Period to prepa	ure:			•		
Select Time Zone			In Emplo	oyees' TZ 🗘		
			Prepare Payr	oll for Export		
			Show H	i <mark>dd</mark> en Exports		
Exported on	Comment	Export start	Export end	Status		
 08/19/2013 02:18 PM CDT 08/19/2013 02:17 PM CDT 	Payroll Type: Direct Payroll Type: Direct	08/11/2013 12:00 AM CDT 08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT	Pending Invalidated		
∇				100 \$		

Before you export:

An <u>Alternate Number</u> must be assigned to each employee.
A 2-digit numeric <u>Department Code</u> is required.

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.
 Click the Prepare Payroll for Export button.

Export Payroll Options						
Export Type	Payroll Type					
Prepare export with employees from the following type:	Direct					
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌					
Select Time Zone	In Employees' TZ 🗢					
	Prepare Payroll for Export					

Manual

Manual
I. Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
Select an employee or group of employees to include in the export.
Manually select a range of time for this report, or use the quick selection drop down box.
Select aritime Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
Click the Prepare Payroll for Export button.

Export Payroll Options			
Export Type	Manual	•	
Select employees to include in the export	🔍 All Visible Employees In Keeler Co.	\$	
Start Date and End Date	Last Week	٥	
	From: 09/09/2013 12:00:00 AM		
	To: 09/16/2013 12:00:00 AM		
Select Time Zone	In Employees' TZ	٥	
	Prepare Payroll for Expo	rt	



Export Payroll



After the payroll data is prepared for export, the Pending Export window will open

Select Fortune 1000 Format from the drop down menu.
 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.

Enter Fortune 1000 settings			
Preset Name:	My Preset		
Configuration:			
Please specify a name and click the "Save Settings" button. There are currently no additional configuration items for Fortune 1000 Payroll.			
Save Setti	ngs Cancel		

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.

Export Settings / Comment			
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: My Preset		
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset		
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.			
← Go Back	Continue →		

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.

Calculation Status		
Data is being calculated for the time period requested. The status is viewable below:		
Data calculation scheduled		
Force Stop		

Payroll Export Data - Final Step

Export Payroll Data - Final Step				
Your payroll data is ready.				
Download PIMPORT.001				
Unlock and Return to TimelPS				
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.				
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period				

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 🗘
$ \vee $					

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

Payroll Export Pavroll Format : Export Payroll Optic Export Type Payroll Type ≎ Prepare export with employees from the following type: -- Select a Payroll Type -- 🗘 Select Payroll Period to prepare: \$ Select Time Zone In Employees' TZ 💲 Prepare Payroll for Export Show Hidden Exports Exported on 08/19/2013 02:18 PM CDT Export en 08/11/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT Payroll Type: Direct 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 \$

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.

Export Payroll Options		
Export Type	Payroll Type	
Prepare export with employees from the following type:	ployees from the following type: Direct	
Select Payroll Period to prepare:	oll Period to prepare: Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 🝸	
Select Time Zone	In Employees' TZ	
	Prepare Payroll for Export	

Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for or use the quick selection drop down box.
 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.

Export Payroll Options		
Export Type	Manual	
Select employees to include in the export	🔍 All Visible Employees In Keeler Co. 🗘	
Start Date and End Date	Last Week 2	
	From: 09/09/2013 12:00:00 AM	
	To: 09/16/2013 12:00:00 AM	
Select Time Zone	In Employees' TZ 🗘	
	Prepare Payroll for Export	

	Calculation Status
Next you should see the payroll calculation being scheduled.	Data is being calculated for the time period requested. The status is viewable below:
	Data calculation scheduled
	Force Stop

Export Manual Payroll



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 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.

Export Settings/Comment		
No Presets Found		
"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets defined for the type of export you are attempting to complete, so you must either add or import a preset before you can continue.		
Create a Preset	Import a Preset	
You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.	
Add Preset	Browse No file selected.	
Aug Heset	Import Preset	
+ Go Back	Continue →	

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

Manual (.csv)		
Preset Name:		Manual default
Include column headers		V
Summarize each employee's work hours:		
Line Terminator:		Windows (CR/LF)
Delimiter:		,
Date Format:		YYYY-MM-DD
Name Format:		Last, First Middle
	Save Settings Cance	

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.

Export Settings / Comment					
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: My Preset				
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset				
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.					
← Go Back	Continue →				
1. 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.

	Calculation Status		
Data is being calculated for the time period requested. The sta viewable below:			
Data calculation scheduled			
	Force Stop		

Payroll Export Data - Final Step

Export Payroll Data - Final Step				
Your payroll data is ready.				
Download manual-payroll-Aug-11-2013-1379686427.csv				
Unlock and Return to TimeIPS				
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.				
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period				

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
۲	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
٠	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
۲	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 0
\sim					

Internal Information (visible to Administrators only):

	v1.4	v1.5 and up		
	IPSQBI	IPSQBI IPSCPI IP		IPSEPI
Payroll Exports	No Dependencies	No Dependencies	Requires IPSQBI & IPSIPS	Requires IPSQBI & IPSIPS
ACCPAC*	X			
ACCPAC Header*	X			
ADP PC/Payroll 5.1	Х	Х	X	x
Custom: Audit Detail			New	×
Ceridian Insync	Х			New
Custom Export			New	×

Creative Solutions Payroll CS	Х	Х	Х	Х
Fortune 1000	Х	Х	Х	Х
Great Plains (Custom Preset)				New
Hours Worked Detail (Custom Preset)			New	Х
Hours Worked Summary (Custom Preset)			New	Х
Job Detail (Custom Preset)			New	Х
Manual (.csv)	Х	Х	Х	Х
MAS90/200 Format 2 (Custom Preset)				New
Paychex 5	Х	Х	х	х
Paychex Paylink 9	Х	Х	Х	Х
Paychex Preview 6.4 (RapidPay)	Х	Х	Х	Х
PayChoice (Custom Preset)				New
Paywork	Х	Х	X	X
PeachTree Complete Accounting				New
PeopleSoft 8	Х	Х	X	Х
Preview-Review (HTML)**	X			
QuickBooks Integration	Х	Х	х	Х
Time+Plus Format (Custom Preset)				New
Vadim (Custom Preset)				New
Volt*	Х			

* 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 5.4 (RapidPay)
 Paychex 9 (Paylink)
 Paychex 9 (Paylink)
 Fortune1000
 Paywork
 PaopleSoft
 PayroliCS
 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

Ŀ	Payroll Export				
۲		Pa	yroll Format Settings		
		Exc	ort Payroll Options		
Ex	port Type			Payr	oll Type 🗘
Pr	epare export with employees	s from the following ty	pe:	Select a Payrol	
Se	lect Payroll Period to prepa	re:			0
Se	lect Time Zone			In Emplo	yees' TZ ♀
				Prepare Payro	II for Export
				Show Hi	dden Exports
	Exported on	Comment	Export start	Export end	Status
+	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
\bigtriangledown					100 \$

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- a. Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 a. 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.
 b. Select the Payroll Period from the drop-down boxes.
 b. Select Time Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Export Payroll Options					
Export Type	Payroll Type				
Prepare export with employees from the following type:	Direct				
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌				
Select Time Zone	In Employees' TZ 🗢				
	Prepare Payroll for Export				

Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for or use the quick selection drop down box.
 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.
 Click the Decease December and and time of the export can be interpreted in the company's timezone or separately for each employee.

5.	Click the	Prepare	Payroll for	r Export b	utton.

Export Payroll Options				
Export Type	Manual			
Select employees to include in the export	🔍 All Visible Employees In Keeler Co. 🗘			
Start Date and End Date	Last Week From: 09/09/2013 12:00:00 AM To: 09/16/2013 12:00:00 AM			
Select Time Zone	In Employees' TZ 🗘			
	Prepare Payroll for Export			

	Calculation Status	
Next you should see the payroll calculation being scheduled.	Data is being calculated for the time period requested. The status is viewable below:	
	Data calculation scheduled	
	Force Stop	

Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.

Exported on	Comment	Ехро	't start	Export end	Status		
09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2013 1	2:00 AM CDT	09/20/2013 12:00 A	M CDT Pending		
Exported by Keeler, Matthew M.							
Paychex 5	•			Pending Export			
Export P.	ayroll Data		wnload/export	pared payroll data to be the payroll data to your oks or ADP), use the 'Ex button to the left.	payroll software		
				battor to the reat			
		ployees include e details about t					
	Inva	lidate this Exp	ort		Hide		
	Commer	it: Patty's Payr	ll				
				Severt Row	Save Row		

Select **Paychex 5** from the drop down menu.
 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.



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 C	Configuration:	
Wage Code for Standardtime:	R1	
Wage Code for Overtime:	R2	
Wage Code for Doubletime:	DT	
Wage Code for Premium Time:	Prei	
Wage Code for Holiday:	НО	
Wage Code for Piecework:	Pie	
Wage Code for Sick:	SI	
Wage Code for Vacation:	VA	
Save Settin	gs 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.



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.

	Calculation Status
Next you should see the payroll calculation being scheduled.	Data is being calculated for the time period requested. The status is viewable below:
	Data calculation scheduled
	Force Stop

Payroll Export Data - Final Step

Export Payroll Data - Final Step	
Your payroll data is ready.	
Download JJ0000I.00000	
Unlock and Return to TimeIPS	
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.	
Payroll Lock Option imeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period	
 Click the blue link to Download the data and open it in a spreadsheet program such as Open Office Calc or Microsoft If you have confirmed that the information contained in this export is correct and wish to permanently lock the payrol 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 cl 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 a 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 \$
- 1						

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

	Payroll Export			
•		Pa	yroll Format Settings	
		Exp	ort Payroll Options	
Ex	port Type			Payroll Type 🗢
Prepare export with employees from the following type:				Select a Payroll Type 🗘
Se	lect Payroll Period to prepa	re:		
Se	lect Time Zone			In Employees' TZ 🗘
				Prepare Payroll for Export
				Show Hidden Export
	Exported on	Comment	Export start	Export end Status
	08/19/2013 02:18 PM CDT 08/19/2013 02:17 PM CDT	Payroll Type: Direct Payroll Type: Direct	08/11/2013 12:00 AM CDT 08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT Pending 08/18/2013 12:00 AM CDT Invalidate 100 0

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- a. Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 a. 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.
 b. Select the Payroll Period from the drop-down boxes.
 b. Select Time Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Export Payroll Op	tions
Export Type	Payroll Type 🗢
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌
Select Time Zone	In Employees' TZ 🗢
	Prepare Payroll for Export

Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 Select an imme Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Exp	ort Payroll Options
Export Type	Manual
Select employees to include in the export	🔍 🛛 All Visible Employees In Keeler Co.
Start Date and End Date	Last Week 🗘
	From: 09/09/2013 12:00:00 AM
	To: 09/16/2013 12:00:00 AM
Select Time Zone	In Employees' TZ 🗘
	Prepare Payroll for Export

	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
Next you should see the payroll calculation being scheduled.	Data calculation scheduled
	Force Stop

Export Payroll

After the payroll data is prepared for export, the Pending Export window will open.

	Exported on	Comment		Export start	Export end	Status
	09/19/2013 01:21 PM CDT	Patty's Payroll	09/19/2	013 12:00 AM CDT	09/20/2013 12:00 AM 0	CDT Pending
	Exported by Keeler, Matthew M.					
	Paychex Paylink Export	✓ 9 ▼ Payroll Data		download/export th	Pending Export ared payroll data to be exp he payroll data to your pay ks or ADP), use the 'Export button to the left.	roll software
There are 1 employees included in this export. More details about this payroll data. Invalidate this Export Hide						
	Comment: Patty's Payroll					
					Revert Row	Save Row
	Calent Davids av Davidials (

Select Paychex Paylink 9 from the drop down menu.
 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.

	Export Settings/Comment		
	No Pres	ets Found	
	"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets add or import a preset before you can continue.		
f you have not already created a Paychex Paylink 9 preset, you will see the following screen.	Create a Preset	Import a Preset	
	You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.	
	Add Preset	Browse No file selected. Import Preset	
	← Go Back	Continue	

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 Paylink 9 Pre-import file settings				
Preset Name:	My Preset			
Company (Office) Code:	001			
Sequence Number:	1			
Client Code:	0001			
Employee Identifier:	Alternate Employee Number			
Pay Co	odes:			
Standardtime Code:				
Overtime Code:				
Doubletime Code:				
Holiday Code:				
Sick Code:				
Vacation Code:				
Other Code:				
Types included in '	Other" Pay Code:			
Include Piecework as "Other" Time:	No			
Include Premium Time as "Other" Time:	No			
Save Setting	s Cancel			

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 Holiday hours Vacation Code: Enter the Code used to identify Sick 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.

Export Settings / Comment				
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: My Preset			
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset			
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.				
← Go Back	Continue →			

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.	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
	Data calculation scheduled
	Force Stop

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 🗘
\sim					

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

Payroll Export				
±	Pa	yroll Format Settings		
	Exc	ort Payroll Options		
Export Type			Payr	roll Type 🗘
Prepare export with employee	es from the following ty	pe:	Select a Payrol	l Type 🗘
Select Payroll Period to prepa	ure:			0
Select Time Zone			In Emplo	yees' TZ 🗘
			Prepare Payro	oll for Export
			Show Hi	idden Exports
Exported on	Comment	Export start	Export end	Status
8/19/2013 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
\bigtriangledown				100 🗘

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- Inder Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 Select Time Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Export Payroll Options	
Export Type	Payroll Type 🗘
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌
Select Time Zone	In Employees' TZ ≎
	Prepare Payroll for Export

Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 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.
 Click the Prepare Payroll for Export button.

5. Click the Prepare Payroll for Export button.	
Expe	ort Payroll Options
Export Type	Manual
Select employees to include in the export	🔍 All Visible Employees In Keeler Co. 🗘
Start Date and End Date	Last Week 0
	From: 09/09/2013 12:00:00 AM
	To: 09/16/2013 12:00:00 AM
Select Time Zone	In Employees' TZ
	Prepare Payroll for Export
	Calculation Status
	Data is being calculated for the time period requested. The sta



Export Payroll

After the payroll data is prepared for export, the Pending Export window will open

Exported on	Comment		Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payrol	09/19/20	13 12:00 AM CDT	09/20/2013 12:00 AM	1 CDT Pending
	Expo	orted by Kee	ler, Matthew M.		
Paychex Preview Export Pa	yroll Data	_	download/export th	Pending Export ared payroll data to be en the payroll data to your pr so or ADP), use the 'Expo button to the left.	ayroll software
	Mc Mc	ore details ab	out this payroll data.		
	Inv	alidate this	Export		Hide
	Comme	ent: Patty's	Payroll		
				🥱 Revert Row	Save Row

Select Paychex Preview 6.4 (RapidPay) from the drop down menu.
 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.

	Export Settings/Comment		
	No Presets Found		
	"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets defined for the type of export you are attempting to complete, so you must either add or import a preset before you can continue.		
If you have not already created a Paychex Preview 6.4 (RapidPay) preset, you will see the following screen.	Create a Preset Import a Preset		
	You can create a preset from scratch or use a You can import a preset that you have previous template if one is available. You can import a preset that you have previous exported from TimelPS.		
	Add Preset Browse No file selected. Import Preset		
	← Go Back Continue →		
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 s presets and select the preset that applies for the group you are exporting at the time.	settings change from one group of employees to another, you may create mult		

The preset window will appear.

Enter Paychex Preview 6.4 (RapidPay) Import File settings		
Preset Name:	My Preset	
Client Code:	0001	
Wage Code C	onfiguration:	
Wage Code for Standardtime:	1	
Wage Code for Overtime:	2	
Wage Code for Doubletime:	3	
Wage Code for Premium Time:	4	
Wage Code for Holiday:	5	
Wage Code for Piecework:	6	
Wage Code for Sick:	7	
Wage Code for Vacation:	8	
Save Settin	gs Cancel	

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.

Export Settings / Comment				
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: My Preset			
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset			
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.				
← Go Back	Continue →			

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.	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
	Data calculation scheduled
	Force Stop

Payroll Export Data - Final Step

Export Payroll Data - Final Step	
Your payroll data is ready.	
Download 0001_ta.txt	
Unlock and Return to TimeIPS	
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.	
Payroll Lock Option	
TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below.	
Lock This Payroll Period	

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
۲	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
۲	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

Payroll Export				
B	Pa	yroll Format Settings		
	Exp	oort Payroll Options		
Export Type			Pay	roll Type 💲
Prepare export with employee	es from the following ty	/pe:	Select a Payrol	l Type 🗘
Select Payroll Period to prepa	are:			•
Select Time Zone			In Emplo	yees' TZ 🗘
			Prepare Payro	oll for Export
			Show H	idden Exports
Exported on	Comment	Export start	Export end	Status
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
8/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT	Invalidated
\bigtriangledown				100 \$

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

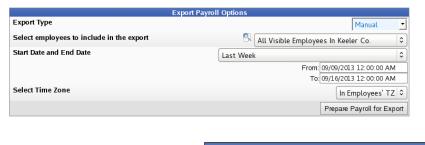
- 1. Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 2. Select a Payroll Type. All employees (including released employees) that are currently in the selected Payroll Type will be included in the prepared payroll data.
 3. Select the 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

Export Payroll Options	
Export Type	Payroll Type 🗘
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌
Select Time Zone	In Employees' TZ ≎
	Prepare Payroll for Export

Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 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.

Seneutian employee of grady of the former of the seport,
 Select a Time Zone. The start and end time of
 Click the Prepare Payroll for Export button.





Export Payroll

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 CD	T Pending
	Expo	rted by Keeler, Matthew M.		
Paywork	3 01:21 PM CDT Patty's Payroll 09/19/2013 12:00 AM CDT 09/20/2013 12:00 AM CDT Pending Exported by Keeler, Matthew M.			
Export Pa	yroll Data			
			ks or ADP), use the 'Export Pa	
			button to the left.	
	Inva	alidate this Export		Hide
	Comme	nt: Patty's Payroll		
			🔊 Revert Row 🔒	Save Row

After the payroll data is prepared for export, the Pending Export window will open.

If you have not already created a **Paywork** preset, you will see the following

Select **Paywork** from the drop down menu.
 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.

Create a Preset Import a Preset			
en. You can	No Pres	ets Found	
ā	payroll data is exported to different p defined for the type of export you are	ayroll programs. Currently there are no presets attempting to complete, so you must either	
		You can import a preset that you have previously	
		Browse No file selected.	
	Add Preset	Import Preset	
	← Go Back	Continue	

Click the $\boldsymbol{Add}\ \boldsymbol{Preset}$ 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 Paywork Payro	ll Import File settings
Preset Name:	My Preset
Export Time Display in File	Hours:Minutes (i.e. 1:30)
Export Pay Rate	Yes 🗢
Wage Code C	Configuration:
Wage Code for Standardtime:	1
Wage Code for Overtime:	2
Wage Code for Doubletime:	3
Wage Code for Premium Time:	4
Wage Code for Holiday:	5
Wage Code for Piecework:	6
Wage Code for Sick:	7
Wage Code for Vacation:	8
Save Settin	gs Cancel

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.

Export Setting	gs / Comment
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	add a new preset, import a new preset, Edit Preset Delete Preset Export Preset the employees you have selected, is set of employees can be identified
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.	
← Go Back	Continue →

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.

Data is being calculated for the time period requested. The status is viewable below: Data calculation scheduled... Force Stop

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	I in this export is correct and wish to permanently lock the pay	roll period, click the button labeled Lock This Payroll Per	od, otherwise choose
Unlock and Return to TimeIPS. Locking the payro	Il 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
۲	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

Payroll Export				
	Pa	yroll Format Settings		
	Exp	ort Payroll Options		
Export Type			Pa	ayroll Type 🗘
Prepare export with employee	s from the following ty	pe:	Select a Payr	oll Type 💲
Select Payroll Period to prepa	re:			•
Select Time Zone			In Emp	loyees' TZ 🗘
			Prepare Pay	roll for Export
			Show	Hidden Exports
Exported on	Comment	Export start	Export end	Status
08/19/2013 02:18 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CD	T Pending
8/19/2013 02:17 PM CDT	Payroll Type: Direct	08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CD	 Invalidated
\bigtriangledown				100 \$

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually 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 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.

St chek the repare ray on to axport battom	
Export Payroll Options	
Export Type	Payroll Type 🗢
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌
Select Time Zone	In Employees' TZ 🗢
	Prepare Payroll for Export

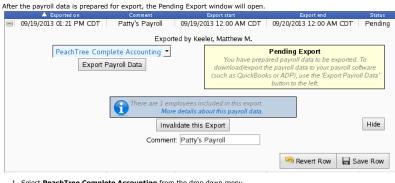
Manual

- Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for or use the quick selection drop down box.
 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.
 Click the Prepare Payroll for Export hutton.

5. Click the Prepare Payroll for Export button.		
E	port Payroll Options	
Export Type	Manual	•
Select employees to include in the export	🔍 All Visible Employees In Keeler Co. 🛛 🗄	\$
Start Date and End Date	Last Week :	\$
	From: 09/09/2013 12:00:00 AM	_
	To: 09/16/2013 12:00:00 AM	
Select Time Zone	In Employees' TZ	\$
	Prepare Payroll for Expo	rt

	Calculation Status
·····	Data is being calculated for the time period requested. The status is viewable below:
Next you should see the payroll calculation being scheduled.	Data calculation scheduled
	Force Stop

Export Payroll



Select **PeachTree Complete Accounting** from the drop down menu.
 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.

	Export Setti	ngs/Comment
	No Pres	ets Found
	payroll data is exported to different p	ons of settings that are used to specify how vayroll programs. Currently there are no presets e attempting to complete, so you must either e.
If you have not already created a PeachTree preset, you will see the following screen.	Create a Preset	Import a Preset
	You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.
		Browse No file selected.
	Add Preset	Import Preset
	← Go Back	Continue
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

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.

PeachTree Complete Accounting

- a unique me loenimer. 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 "befault 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 Co	odes:
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 Setting	ps 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 Mapping to Use default and enter the Peachtree Activity Item ID in the Default Activity Item ID
- ID field.
- O 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.
- 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

- 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 (if "Billing Rate Map" field above is blank):
 If you are storing Billing Rates the 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:
 Q. If you want to include a pulveing a pulve or gourne or the pull-down to Yoc

 - 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

Nu	mber	- C	Col	umn	Ma	app	ing	pull-	down	

- Number Column Mapping pull-down.

 I focum Mapping and Default Billing Status (if "Billing Status Column Mapping" field above is blank):

 I group are storing Billing Statuss 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 Mapping and Default Billing Status TimeIPS field (such as the Employee's Department or Job Control Number), select that field in the Billing Status Column Mapping Column Mapping Column Mapping Column Mapping Time Code: Enter the Code used to define regular hours

 Standardtime Code: Enter the Code used to define overtime hours
 Powertime Code: Enter the Code used to identify Premium hours

 Premium Time Code: Enter the Code used to identify Premium hours

 Planidax Code: Enter the Code used to identify Premium hours

 Planidax Code: Enter the Code used to identify Premium hours

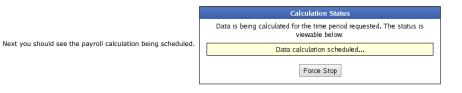
- Holiday Code: Enter the Code used to identify Holiday hours
 Piecework Code: Enter the Code used to identify Piecework hours
 Sick Code: Enter the Code used to identify Sick hours
 Vacation Code: Enter the Code used to identify Exch hours

• Once your preset has been configured, click on Save Settings to save, or Cancel to exit without saving.

Export Setting	gs / Comment
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: My Preset
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.	
← Go Back	Continue →

1. 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.



Payroll Export Data - Final Step

Export Payroll Data - Final Step
Your payroll data is ready.
Download PeachTree-1380919212.csv
Unlock and Return to TimelPS
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below.
Lock This Payroll Period

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
۲	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
۲	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 🗘
\vee					

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 buttor

- 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/Vredor, 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

Payroll Export	
🕒 Payroll Format	Settings
Export Payroll (Options
Export Type	Payroll Type 🗘
Prepare export with employees from the following type:	Select a Payroll Type 🗘
Select Payroll Period to prepare:	
Select Time Zone	In Employees' TZ 🗘
	Prepare Payroll for Export
	Show Hidden Exports
Exported on Comment Exported on Comment	ort start Export end Status
	12:00 AM CDT 08/18/2013 12:00 AM CDT Pending
8/19/2013 02:17 PM CDT Payroll Type: Direct 08/11/2013	12:00 AM CDT 08/18/2013 12:00 AM CDT Invalidated
∇	100 🗘

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- In type
 Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.
 Click the Prepare Payroll for Export button.

5. Click the Prepare Payroll for Export button.	
Export Payroll Optic	ons
Export Type	Payroll Type
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌
Select Time Zone	In Employees' TZ 🗢
	Prepare Payroll for Export

Manual

- Manual
 Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 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.
 Click the Prepare Payroll for Export button.

5. Click the Flepale Payloli for Export button.	
Expor	t Payroll Options
Export Type	Manual
Select employees to include in the export	🔍 🛛 All Visible Employees In Keeler Co. 🛛 🗘
Start Date and End Date	Last Week 🗘
	From: 09/09/2013 12:00:00 AM
	To: 09/16/2013 12:00:00 AM
Select Time Zone	In Employees' TZ 🗘
	Prepare Payroll for Export
	Trepare Taylor for Export

	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
Next you should see the payroll calculation being scheduled.	Data calculation scheduled
	Force Stop

Export Payroll

Exported on	Comment	Export start	Export end	Status
09/19/2013 01:21 PM CDT	Patty's Payrol	09/19/2013 12:00 AM CDT	09/20/2013 12:00 AM CD	T Pending
	Expo	ted by Keeler, Matthew M.		
PeopleSoft 8 Export F	▼ Payroll Data	download/export t	Pending Export ared payroll data to be expor he payroll data to your payrol ks or ADP), use the 'Export Pa button to the left.	ll software
	Moi	nployees included in this export. re details about this payroll data.		Llida
	Moi			Hide
	1 Moi	e details about this payroll data.		Hide
	1 Moi	e details about this payroll data. alidate this Export	Revert Row	Hide Save Row

Select PeopleSoft & norm the grop down menta.
 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.

	Export Setti	ngs/Comment	
2	No Presets Found		
	"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets defined for the type of export you are attempting to complete, so you must either add or import a preset before you can continue.		
If you have not already created a PeopleSoft preset, you will see the following screen.	Create a Preset	Import a Preset	
	You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.	
	Add Preset	Browse No file selected. Import Preset	
	← Go Back	Continue	
	← Gu Back	Continue	

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 PeopleSoft 8 settings		
Preset Name:	My Preset	
Wage and Benefit Co	lumn Configuration:	
Standardtime Column:	1 (Standardtime)	
Overtime Column:	2 (Overtime)	
Doubletime Column:	3 (Doubletime)	
Premium Time Column:	3 (Doubletime)	
Holiday Column:	5 (Holiday)	
Piecework Column:	Ignore 🗘	
Sick Column:	Ignore 🗘	
Vacation Column:	4 (Vacation)	
Save Settin	gs Cancel	

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.

Export Settings / Comment		
Export Settings Preset: Before calculating payroll, you must select the settings to use for this export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Keeler Co.: My Preset	
	Edit Preset Delete Preset Export Preset	
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.		
← Go Back	Continue →	

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.



Payroll Export Data - Final Step

Export Payroll Data - Final Step		
Your payroll data is ready.		
Download peoplesoft09-20-2013-1380920007.dat		
Unlock and Return to TimeIPS		
To make sure that the data does not change while you are reviewing the export file, TimeIPS has locked worked time, benefits, overtime policies and workweek group settings. Clicking "Unlock and Return to TimeIPS" will unlock your system and will allow further changes, possibly making this export no longer match the data in TimeIPS.		
Payroll Lock Option TimeIPS allows you to lock a Payroll Period in order to prevent modifications of any kind for the employees and times in this export. If your organization needs this kind of locking, please click the "Lock Payroll" button below. Lock This Payroll Period		
 Click the blue link to Download the data and open it in a spreadsheet program such as Open Office Calc or Microso If you have confirmed that the information contained in this export is correct and wish to permanently lock the part. 		

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 🗘
\sim					

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

Payroll Export				
	Pa	yroll Format Settings		
	Ext	oort Payroll Options		
Export Type			Pay	roll Type 🗘
Prepare export with employee	es from the following ty	/pe:	Select a Payrol	l Type 🗘
Select Payroll Period to prepa	are:			0
Select Time Zone			In Emplo	yees' TZ 💲
			Prepare Payro	oll for Export
			Show H	idden Exports
Exported on	Comment	Export start	Export end	Status
 08/19/2013 02:18 PM CDT 08/19/2013 02:17 PM CDT 	Payroll Type: Direct Payroll Type: Direct	08/11/2013 12:00 AM CDT 08/11/2013 12:00 AM CDT	08/18/2013 12:00 AM CDT 08/18/2013 12:00 AM CDT	Pending Invalidated
∇				100 \$

Prepare Payroll for Export

First, choose to generate the report by Payroll Type or Manually select employees and a range of time.

Payroll Type

- Under Export Type.
 Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 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.
 Click the Prepare Payroll for Export button.

5. Click the Prepare Payroll for Export button.		
Export Payroll Options		
Export Type	Payroll Type	
Prepare export with employees from the following type:	Direct	
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM) 💌	
Select Time Zone	In Employees' TZ	
	Prepare Payroll for Export	

Manual

- Manual
 Under Export Type, select Manual to generate the report. (See "Payroll Type" above for specifics on that option.)
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 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.
 Click the Prepare Payroll for Export button.

Export Payroll Options		
Export Type	Manual	
Select employees to include in the export	🔍 🛛 All Visible Employees In Keeler Co. 🔷	
Start Date and End Date	Last Week 🗘	
	From: 09/09/2013 12:00:00 AM	
	To: 09/16/2013 12:00:00 AM	
Select Time Zone	In Employees' TZ 🗘	
	Prepare Payroll for Export	

Next you should see the payroll calculation being scheduled.

Calculation Status		
	Data is being calculated for the time period requested. The status is viewable below:	
[Data calculation scheduled	
Force Stop		

Export Payroll



After the payroll data is prepared for export, the Pending Export window will open.

Select QuickBooks Integration from the drop down menu.
 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.

	Export Setti	ngs/Comment	
	No Presets Found		
	"Payroll Presets" are named collections of settings that are used to specify how payroll data is exported to different payroll programs. Currently there are no presets defined for the type of export you are attempting to complete, so you must either add or import a preset before you can continue.		
you have not already created a QuickBooks Integration preset, you will see the following screen.	Create a Preset	Import a Preset	
	You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.	
	Add Preset	Browse No file selected. Import Preset	
	+ Go Back	Continue →	

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:

If

- 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\Truit\QuiteBooks03.[filename]. dw. If you have difficulty, instructions for network troubleshooting and finding your IP address can be found on our support
- 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.

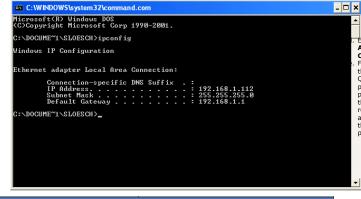
 If you have not done so already, download the timetry quickbooks client.
 From the QuickBooks Payroll Export Settings page (shown above), click on the TimeIPS QuickBooks Client (qbTimeIPS.exe) link at the top of the page and save to an easily-accessed location on your computer, such as your desktop.

NOTE: You will launch this application each time you run the payroll integration.

QuickBooks Pay	roll 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, built TimeIPS contort reach QuickBooks, then select 'Pull Data To QuickBooks'. In the 'Pull Mode', a configuration file called dpt TimeIPS-configuration, 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 QBI
 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 GuickBooks 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 avternal address. which cause the address here is the external address.
 - Ask your network administrator.

 - OR OR O 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



Enter the IP address listed under the Ethernet Adapter Local Area Network Connection listing as the QuickBooks

Area network Connection listing as the Quickbooks Computer IP Address. 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 pprt forwarding TCP 6035 from your computer to an IP address that can be seen by TimeIPS. This would normally be done on a rquter 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.

-

OuickBooks	Export Options:
Name format used in QuickBooks	First Middle Last
Shorten middle names to initial of length	(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
- Select Yes in the Automatically check the Employee's use time data to create paychecks" pox in QuickBooks, if needed. TIMEP'S 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 imter's to export entity and any select the will be used for the export exist in QuickBooks before starting to export in QuickBooks. If this happens, you'll need to fix the errors and re-run payroll to complete the export.

	Quic	kBooks Payr	oll Items Configuration:	
	Рау Туре	Separator	Appended Field	Default Value
Payroll Item for Standardtime:	Regular Pay		\$	
Payroll Item for Overtime:	Overtime Pay		0	
Payroll Item for Doubletime:	Doubletime Pay		0	
Payroll Item for Premium Time:	Premium Time		• • • • • • • • • • • • • • • • • • •	
Payroll Item for Holiday:	Holiday Pay		0	
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 -

No facilitate tins, use the Separator and Appended Field/Default Value. For example, to pay two departments (marketing and Accounting) with different Payron 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 J	ob Tracking and Custom Field Values:	
Set QuickBooks "Is Billable" to	False (True for Service Item/Customer Traci	king)
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	0

- 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 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 "To at "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 billions:front:checkout the hereak down in quickBooks used this to figure out the sub fields.
 Set 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" 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 "Survice 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" on 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 "Industations of the set of 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 OuickBooks "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 class line which the timed activity falls. In QuickBooks, class tracking is off by default. QuickBooks line which the timed activity falls. In QuickBooks, class tracking is off by default. QuickBooks class line which the timed activity falls. In QuickBooks, class tracking is off by default. QuickBooks class line which the timed activity falls. In QuickBooks, class tracking is off by default. QuickBooks class line which the timed activity falls. In QuickBooks, class tracking is off by default.

		QuickBooks C	lock Field Values:		
	Pay Type	Separator	Appended Field	When	
Clock In Note:				Co Not Export	•
Clock Out Note:				Co 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 Set	tings 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

Create a new Piecework	
Name A descriptive name for this piecework, such as "Widgets" or "Tips".	Tips
Create	

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.

		Qu	ickBooks Piecework Values:		
Enable Pie	cework Mappings		Yes 🗘		
	Pay Type	Separator	Appended Field		When
Tips:				٥	Do Not Export
			Save Settings Cancel		

NOTE: TimeIPS doesn't push the Pay Rate information into OuickBooks.

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.

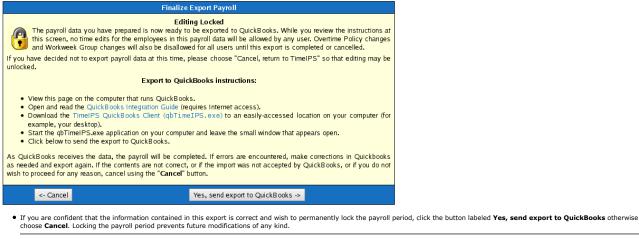
Export Setting	gs / Comment
Export Settings Preset: Before calculating payroll, you must select the settings to use for this	Keeler Co.: My Preset
export. Alternatively, you can add a new preset, import a new preset, or restore a historical copy.	Edit Preset Delete Preset Export Preset
Export Comment: Before calculating payroll for the employees you have selected, please enter a comment so this set of employees can be identified when reviewing exported payroll later.	
← Go Back	Continue -

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

Calculation Status
Data is being calculated for the time period requested. The status is viewable below:
Data calculation scheduled
Force Stop

Payroll Export Data - Final Step



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
(\pm)	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 \$
\sim					

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/gbSDK-current/OSR/OnscreenRef/index-QBD.html

Look for the TimeTrackingAdd request docs

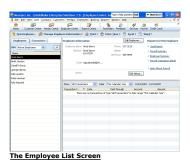
QuickBooks Integration - Setup QuickBooks

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.



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.

Ole Edit York Unit	a Soabauk -			npirgees gan	and Exboard	a Mungow Rep				0)
ne Castoner Cer	ter Vendor Ca		ce Center	Report Cento	r Ann	viero Peedback	Services	and Tayrol	Oredit Cards	
omation for Jundy Ba						OK				
Change Labs	Peyrol and	Conpensation	n Dife 💌	1		Cancel	4			
				AMM K & SAVE	Linux Int		_			
Earnings Zero Name	HoartsWa		Parcel		×	Heb				
Eastly - Eessaw	HOURINA	Sub Kate	20 edde			Exployee is notice				
Hourly - O.T.		0.00	Partfreq	pency Duneki	<u> </u>	- nacova				
Double Over Time		0.00 🐱								
Like Sige data to on	ake psychecks		1.6	ises & Pranotio	16					
	and Constants				_					
			_	Terre	51			R		
Additions, Deduction Trans Name	and Congany Amount	Link	_	Tager.				R		
				SOTIKA	en			D ₄		
					en			D ₄		
Additors, Deduction Jam Name				SOTIKA	en			R		
Jam Name	Anout	Link		SOTIKA	en			D		
	Anout	Link		SOTIKA	en			D		
Jam Name	Anout	Link		SOTIKA	en			De		
Jam Name	Anout	Link	*	SOTIKA	en			D		
Jam Name	Anout	Link	8	SOTIKA	en			D		
Jam Name	Anout	Link		SOTIKA	en			D		
Jam Name	Anout	Link	*	SOTIKA	en			D ₂		
Jam Name	Anout	Link	×	SOTIKA	en					
Jam Name	Anout	Link		SOTIKA	en					

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.



Select Yes in the Do You Track Time radio button.

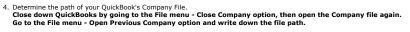
3. Setup and write down your Payroll Items. Go to the Lists menu - Payroll Item List.



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.





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

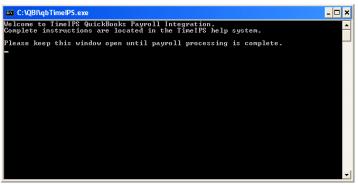
You have now setup QuickBooks and TimeIPS and are ready to run the integration.

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 gbTimeIPS.exe file you downloaded and saved to your computer when Setting up TimeIPS



NOTE: The gbTimeIPS.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.

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.

Confir	m to Proceed
?	This application is not signed with a digital certificate. If you allow unsigned applications to access your file, a different application could use the same application name and possibly misuse your data. For suggestions about enhancing the safety of your company's data, click Help.
	You have chosen to allow this unsigned application to access employee Social Security Numbers and other personal data in your QuickBooks company file without asking the user again.
	To help protect your company's data, Intuit suggests: - Always use signed applications - Find out what data this application accesses - Notify your employees that certain data may be accessed - Inform the application developer that you prefer to use only signed applications
	Are you sure you want to allow this access?
	Yes No Help

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:

•	Weekly Timeshe	et												×
ŀ	🔁 Previous 🕒 Nex	t 🍏 Print 🔹	Edit Single	Activity 🚯 Le	t Your Em	ployees E	inter Time	e						
	Name <u>Kimberlie M</u> Week Of Mar 28 to	-	✓									Time	shee	t
	Customer:Job	Service Item	Payroll Item	Notes	Su 28	M 29	Tu 30	W 31	Th 1	F 2	Sa 3	Total	Billable?	
l	*	*	Reg - Sales 🛛 💙			3.20	3.65	4.15	4.09	5.06		20.15		^
l			Reg - Sales			0.98	4.77	2.14	4.06	2.72		14.68		
l			Reg - Sales			3.21						3.21		
l														
														~
l				Totals	0.00	7.39	8.42	6.29	8.15	7.79	0.00	38.03		
ľ														
ŝ	Wrap text in Notes	; field												
	Copy Last Sheet]						s	<u>a</u> ve & Clo	ise 😭	jave & Ne	•••	Revert	

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:

b. Click on the Yes, Always button.

Enter Payroll Information	Revie Paych	w & Greate recks		Print & Disl Paychecks									
				H	ow do I pay my	employees?							
yroll Information			1										
ay Employees F	Pay Period Ends 0	4/03/2010 📕	Bank Acc	ount: 10000) · Checking	~							
mployees Selected to Pay: 0	Check Date	4/08/2010 📰	Bank Acc	ount Balance:									
and all a Cours Developed Dates													haudda Calar
neck All Open <u>P</u> oycheck Detail										Sort By	imployee Name	<u> </u>	how/Hide Column
			1	Hourly OT	Hourly OT	Sick - Support	Vacation - Support	Holiday - Support	Bereav - Support		imployee Name • Holiday - Administration	Bonus	Total Hours
			1	Hourly OT 1.40		Sick - Support	Vacation - Support	Holiday - Support	Bereav - Support				Total Hours
Employee	Reg - Sup		1	1.40		Sick - Support	Vacation - Support	Holiday - Support	Bereav - Support				Total Hours 79.9
Employee Anna L	Reg - Sup 78.58		1			Sick - Support	Vacation - Support	Holiday - Support	Bereav - Support				Total Hours 79.93 30.94
Employee Anna L. Audrey A.	Reg - Sup 78.58 30.94		1	1.40		Sick - Support	Vacation - Support	Holiday - Support	Bereav - Support				Total Hours 79.93 30.94 81.75
Employee Anna L Audrey A Christopher W	Reg - Sup 78.58 30.94	Reg - Sales	1	1.40		Sick - Support	Vacation - Support	Holiday - Support	Bereav - Support				

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

- Open the company you want to export time to.
 Double-click Security Groups (menu 7-3-1)
 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.

EXit	File Ec	lit Help							
B /	U								HE
.ow	Group#	Group Name	Save	Delete	Void	Chg Period	Print Checks	Notes	
	1	Global	Yes	Yes	Yes	Yes	Yes		
	2	Mitch	No	No	No	No	No		
	3	API	Yes	Yes	Yes	Yes	Yes		
0									
1									
2									
3									
4									
5									
6									
7									
8									
9				-	-				

Choose Save from the file menu to save your changes and close the Security Group window.
 Double-click User List (menu 7-3-2)
 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:	륨 7-3-2 User List □ 🔀							
EXit	File Edit	Options Help	D					
В	IU	Display Pass	vords		Сору	User Defau	ts 🔒 🚝	
Row	User Name	License Group	Group 1	Group 2	Group 3	Group 4	Group 5	
1	Derrick		1 - Global					
2	Doug		1 - Global					
3	Eric		1 - Global					
4 5	Jenniferr		1 - Global					
5	John		1 - Global					
6	Kathy		1 - Global					
7	Kelle		1 - Global					
8	Maria		1 - Global	3 - API				
9	Mitch		2 - Mitch					
10	Supervisor		3 - API	1 - Global				
11 12	TimeIPS		3 - API					
12								
13								
13 14 15 16								
15								
16								
17								
18								
19								
20								
Enter ti	he user name							

Choose Save from the file menu to save your changes and close the User List window.
 Highlight Jobs (menu 3-5) and press F7 on your keyboard. Place a checkmark next to api checkbox then press ok.

著 Form Level Security	X
EXit Help	
Permit Access to	
Global Mitch	

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)

- Post payrol to GL (menu 5-2-6)
 Compensation silp (menu 5-2-7)
 Timecard Journal (menu 5-2-8)
 Daily payroll entry (menu 5-5-2)
 Daily lob 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: See Also: Payroll Export - MasterBuilder Integration Setting up MasterBuilder - MasterBuilder Integration Setting up TimeIPS (Version 1.8.x) Master Builder Integration

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 <u>MasterBuilder Setup article.</u>)

 • Configure Payroll Export options in TimeIPS to match fields in MasterBuilder to fit the needs of your business.

 • Install the <u>TimeIPS MasterBuilder Client</u> 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

🔺 Full	Name	ID/Badge	Employees Manager	Organizatio	onal Unit	Payroll Type	Status	bike transi			
Boresow	, Patty	1005	Lierz, Whitney	Fam	ily	Direct	FT	1			
Required Personal	Title/Position:	8888	Mana	ger:	Lierz, W	hitney	٥				
Employment	Payroll Type:	Dire	Direct								
Pay	rayion type.	Dire						\$			
Biometrics	Holiday Group	o: All H	lolidays					0			
Contact											
Emergency	Organizationa	" Fam	ily					0			
E-Mail	Unit:	_									
Mis cellaneous	Default	Fam	Family								
Permis sions	Department:	_									
Departments		No	No Work Order								
Schedule	Default Job:										
Custom		No	None								
Burdened Rates	ID / Badge:	1005	Altern	ate Number:	7777						
Allocations	Start Date:	11/17				>					
Payroll Tool		11/17	/2011 Emplo	oyea:	Yes (Char	ige)					
Helper	Workweek Group:	Direc	Direct (Edit)								
	Status:	FT	View/. Chang		Title Em Other	ployment St	tatus P	ay			
	Delete:	Disab	led	Print Badge	Suggest	ID/Badge Nu	umber				

Click the plus sign in front of an employee and choose the **Employment** tab.
 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

Payroll Export			
🗈 Pa	yroll Format Settings		
Exp	oort Payroll Options		
Export Type		Payr	oll Type 🗘
Prepare export with employees from the following ty	/pe:	Select a Payroll	Type 🗘
Select Payroll Period to prepare:			
Select Time Zone		In Employ	yees' TZ ♀
		Prepare Payro	ll for Export
		Show Hi	dden Exports
Exported on Comment	Export start	Export end	Status
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
\bigtriangledown			100 🗘

1. Click the + (plus) sign to the left of Payroll Format Settings bar to expand the window.

Payroll Format Setting	5
Select Format Settings to change: Select an export format to modify with Edit Payroll Export Settings.	Sage MasterBuilder
	Edit Payroll Export Settings

From the drop down box, select the Sage MasterBuilder file format to modify.
 Click the Edit Payroll Export Settings button to bring up the editing screen.

	Export Setti	ngs/Comment					
	No Presets Found						
	payroll data is exported to different p	ons of settings that are used to specify how ayroll programs. Currently there are no presets attempting to complete, so you must either a.					
If you have not already created a MasterBuilder preset, you will see the following screen.	Create a Preset	Import a Preset					
	You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.					
	Add Preset	Browse No file selected. Import Preset					
	← Go Back	Continue →					

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

MasterBuilder Payroll Export Settings:

- Instructions:

 - View this page on the computer that runs MasterBuilder.
 Open and read the MasterBuilder Integration Guide (requires Internet access).
 Download the TimeIPS MasterBuilder Client (smbTimeIPS.exe) to an easily-accessed location on your computer
 - (for example, your desktop).

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.

MasterBuilder Payroll Export Settings:				
Preset Name:				
MasterBuilder Company Name	Your Company			
MasterBuilder Username	YourUserName			
MasterBuilder Password	YourPassword			
MasterBuilder Computer IP Address	192.168.205.1			
Ма	sterBuilder Export Options:			
Master Builder Employee ID field	Employee Alt Number			
Check for existence of Entities in MasterBuilder before starting Export	Yes (Standard)			
Master	rBuilder PayType Configuration:			

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 O Ask your network administrator.

O ASK your instructive doministration
 OR
 O 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:

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.

TimelPS 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	
et 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.

Set MasterBuilder "Desc" to Exclude from Integration Image: Default: Set MasterBuilder "JobRef" to Job Short Name Default: Exclude from Integration Image: Default:
Set MasterBuilder "JobRef" to
Set MasterBuilder "JobRef" to
Set MasterBuilder "JobRef" to
Exclude from Integration
Checkade in on integration
Set MasterBuilder "CostCodeRef" to
Exclude from Integration
Set MasterBuilder "DepartmentRef" to
Exclude from Integration
Set MasterBuilder "ServiceOrderRef" to
Exclude from Integration
Set MasterBuilder "PayGroupRef" to
Clock In Note
Set MasterBuilder "Memo" to
Payable Hourly Rate (diff/override and OT/DT/PT) > Default:
Set MasterBuilder "Rate" to
Exclude from Integration
Set MasterBuilder "PhaseRef" to
Exclude from Integration
Set MasterBuilder "WorkersCompCodeRef" to
Save Settings Cancel

- 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 "PayGroupRef". 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 "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.
 Optional Set MasterBuilder "Remo". Choose which field you will us in TimeIPS to track this.
 RequiredSet 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:

Export Set	ings / Comment	
Export Settings Preset: Before calculating payroll, you must select the settings to use for this export. Alternatively, you can add a new preset, import a ne preset, or restore a historical copy.		\$
	Done	

See Also: Payroll Export MasterBuilder Integration Setting up MasterBuilder MasterBuilder Integration Setting up TimeIPS (Version 1.8.x) - Master Builder Integration

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. (<u>Instructional article</u>)
 Configure Payroll Export options in TimeIPS to match fields in MasterBuilder to fit the needs of your business. (<u>Instructional article</u>)
 Install the <u>TimeIPS MasterBuilder Client</u> 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



- View this page on the computer that runs MasterBuilder.
 Open and read the MasterBuilder Integration Guide (requ
- Internet access).
- Download the TimeIPS MasterBuilder Client (smbTimeIPS.exe) to an easily accessed location on your computer (for example, your desktop
- · Start the smbTimeIPS.exe application on your computer and leave the small window that appears open. Click below to send the export to MasterBuilder.

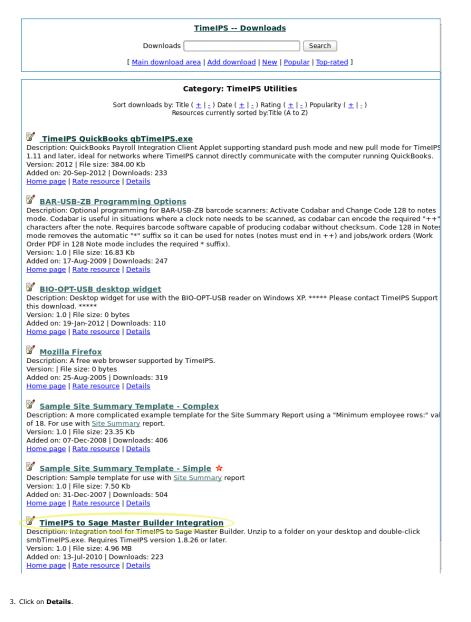
As MasterBuilder receives the data, the payroll will be completed. If errors are encountered, make corrections in MasterBuilder as needed and export again. If the contents are not correct, or if the import was not accepted by MasterBuilder, or if you do not wish to proceed for any reason, cancel using the "Cancel" button.

<- Cancel

Yes, send export to MasterBuilder ->

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.



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 [<u>Home page</u>] [<u>Download comments</u> | <u>Editor review</u> | <u>Modify</u> | <u>Report broken link</u>]

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 <u>TimeIPS MasterBuilder Client</u> on your computer running MasterBuilder. (Instructional article)

Run Payroll Integration

- Open MasterBuilder
 Launch MasterBuilder API
 Launch the <u>TimeIPS MasterBuilder Client</u> 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.

Ē s	Sage Master Builder API Administration 🖃 🗆 🔯
File	Edit Help
Г	API Status
	Stop
	Configuration
	MB Data Drive 🕞 c:
	Exit

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.
- Choose edit at the top of the Sage Master Builder API and choose security.
 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.
- 7. Close the security screen. You will need to leave the Sage Master Builder API running while you run the integration.

TimeIPS - Sage Master Builder export utility.	
ile Options Help	
Master Builder API Status Walting for Connections	
Close Connection	
aiting for TimeIPS Master to connect	

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 Manually select employees and a range of time.

Payroll Type

- Under Export Type, select Payroll Type to generate the report. (See "Manual" below for specifics on that option.)
 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.
 Select the Payroll Period from the drop-down boxes.
 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.
- Click the Prepare Payroll for Export button.

Export Payroll Options	
Export Type	Payroll Type 🗢
Prepare export with employees from the following type:	Direct
Select Payroll Period to prepare:	Sep 01, 2013 to Sep 08, 2013 (12:00 AM)
Select Time Zone	In Employees' TZ 🗢
	Prepare Payroll for Export

Manual

Under Export	Type, select	Manual t	o generate	the report.	(See "Pa	yroll Type"	above for specifics	on that option.)

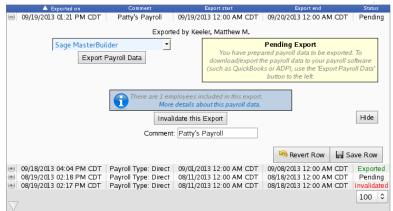
- Select an employee or group of employees to include in the export.
 Select an employee or group of employees to include in the export.
 Manually select a range of time for this report, or use the quick selection drop down box.
 Select a Time Zone. The start and end time of the export can be interpreted in the company's timezone or separately for each employee.
 Click the Prepare Payroll for Export button.

Export Payr	oll Options	
Export Type	Manual	Ī
Select employees to include in the export	🔍 All Visible Employees In Keeler Co. 🔷 🗘	
Start Date and End Date	Last Week 09/09/2013 12:00:00 AM To: 09/16/2013 12:00:00 AM	
Select Time Zone	In Employees' TZ	ן
	Prepare Payroll for Export	

Next you should see the payroll calculation being scheduled.

	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
[Data calculation scheduled
	Force Stop

Export Payroll



After the payroll data is prepared for export, the Pending Export window will open.

If you have not already created a MasterBuilder preset, you will see the following screen

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.

Export Settings/Comment				
No Presets Found				
payroll data is exported to different p	ions of settings that are used to specify how payroll programs. Currently there are no presets e attempting to complete, so you must either ie.			
Create a Preset Import a Preset				
You can create a preset from scratch or use a template if one is available.	You can import a preset that you have previously exported from TimeIPS.			
Add Preset	Browse No file selected. Import Preset			
+ Go Back	Continue			

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.

	Calculation Status
	Data is being calculated for the time period requested. The status is viewable below:
being scheduled.	Data calculation scheduled
	Force Stop

Payroll Export Data - Final Step

Next you should see the payroll calculation

Finalize Export Payroll
Editing Locked The payroll data you have prepared is now ready to be exported to MasterBuilder. While you review the instructions at this screen, no time edits for the employees in this payroll data will be allowed by any user. Overtime Policy changes and Workweek Group changes will also be disallowed for all users until this export is completed or cancelled.
If you have decided not to export payroll data at this time, please choose "Cancel, return to TimeIPS" so that editing may be unlocked.
Export to MasterBuilder instructions:
 View this page on the computer that runs MasterBuilder. Open and read the MasterBuilder Integration Guide (requires Internet access). Download the TimeIPS MasterBuilder Client (smbTimeIPS.exe) to an easily-accessed location on your computer (for example, your desktop). Start the smbTimeIPS.exe application on your computer and leave the small window that appears open. Click below to send the export to MasterBuilder. As MasterBuilder receives the data, the payroll will be completed. If errors are encountered, make corrections in
MasterBuilder as needed and export again. If the contents are not correct, or if the import was not accepted by MasterBuilder, or if you do not wish to proceed for any reason, cancel using the "Cancel" button.
<- Cancel Yes, send export to MasterBuilder ->

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
۲	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 \$
\sim					

See Also:

See Also: Setting up MasterBuilder MasterBuilder Integration Setting up TimeIPS (Version 1.8.x) Master Builder Integration Pavroll Export - MasterBuilder Integration MasterBuilder Integration - Install TimeIPS Masterbuilder Client

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.

212 of 529

Employee Timesheet Approvals

Using the left pane Main Menu » My TimeIPS, go to: My Timesheet

	Му	Timesheet	
--	----	-----------	--

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

The My Timesheet allows you to view your current pay period for discrepancies.

L	eg end	
•	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
I	Work week boundaries [disable]	Pay period boundaries [disable]

October 06, 2013 - October 13, 2013										
Sunday	Monday		uesday	Wednesd		Thursd		Friday	Saturd	
06 October	07 October	08 Oc		09 October		10 October		11 October	12 Octobe	r –
24:00:00 Standardtime	 16:00:00 Standardtime 	24:00		24:00:00		24:00:00		24:00:00	24:00:00	
Standardtime		Overt	me	Overtime		Overtime		Overtime	Overtime	
	08:00:00 Cvertime									
	Ovenime									
3 October										
w	orked Time			Benefit Tir	ne			Tota	l Time	
Туре	Amount		Туре	Ame	ount		Туре		Amount	
Doubletime	00:00:00		Holiday	00:0	00:00		Work	ed Time	168:00:00	
Overtime	128:00:00		Sick	00:0	00:00		Bene	fit Time	00:00:00	
Premium Time	00:00:00		Vacation	00:0	00:00		тот/	۹L	168:00:00	
Standardtime	40:00:00		TOTAL	00:0	0:00					
Stanuarutime	168:00:00									

If there are no discrepancies, click the **Confirm** button to submit your approval.

egend										
	oy employee and Re	equires manager	approval		Not Approved by					
Requires a mar				¢	No approval requ	ired				
Employee still clocked in. (Hours not included in totals)										
Work week bou	ındaries [disable]				Pay period bound	laries (disable)				
Fimeshe	et for Ke	eler, Lar	ry							
Senerated on Oct	tober 17, 2013 at 11	:09:15 AM CDT.	Time and days a	are shown in	company time.					
(=		October	06, 2013 – Octob	oer 13, 2013						
Sunday	Monday	Tuesday	Wednesday	Thursd	lay Friday	saturday				
06 October		08 October	09 October	10 October		12 October				
				24:00:00	ali 00:00 🖉	24:00:00				
Standardtime		Overtime	Overtime	Overtime	Overtime	Overtime				
	08:00:00 🛷									
	Overtime									
3 October										
5 October										
	rked Time		Benefit Time			al Time				
Туре	Amount	Туре	Amoun	it	Туре	Amount				
Doubletime	00:00:00	Holiday	00:00:0	0	Worked Time	168:00:00				
Overtime	128:00:00	Sick	00:00:0	0	Benefit Time	00:00:00				
Premium Time	00:00:00	Vacation	00:00:0	0	TOTAL	168:00:00				
		TOTAL	00:00:0	0						
Standardtime	40:00:00	TOTAL	00.00.0	•						

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 late two weeks.
- 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.

Lege									
			nd Requires manager approva	l	 Not Approved by employee 				
		res a manager's approva			🎸 No app	roval required			
× E	mpl	oyee still clocked in. (Ho	urs not included in totals)						
W	/ork	week boundaries			Pay pe	riod boundarie	25		
		Employee	Manager	Standard	OT/DT/PT	Benefit	Total		
		Name	Name	Time	Time	Time	Time		
			10/06/2013 12:00:00 AM	10/13/2013 12:0	0:00 AM				
	ø	Backup, Joey		00:00:00	00:00:00	00:00:00	00:00:00		
	ø	Boresow, Patty	Lierz, Whitney	00:00:00	00:00:00	00:00:00	00:00:00		
\checkmark	-	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.

	oundaries				Pay period bou	ndaries
	eet for Kee			are shown in	the timezone of Ke	eler, Larry, which is
\$		October	06, 2013 – Octob	oer 13, 2013		¢
Sunday	Monday	Tuesday	Wednesday	Thursd	ay Friday	Saturday
06 October 24:00:00 Standardtime	= 16:00:00 = 24:	October 00:00 = ertime	09 October 24: 00: 00 = Overtime	10 October 24:00:00 Overtime	11 October = 24:00:00 Overtime	12 October = 24:00:00 Overtime
3 October						
W	orked Time		Benefit Time		Total	Time
Туре	Amount	Type	Amour	ıt	Type	Amount
Doubletime	00:00:00	Holiday	00:00:0		Worked Time	168:00:00
Overtime	128:00:00	Sick	00:00:0	0	Benefit Time	00:00:00
Premium Time	00:00:00	Vacation	00:00:0	0	TOTAL	168:00:00
	40:00:00	TOTAL	00:00:0	0		
Standardtime	168:00:00					
Standardtime TOTAL						

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 12:0	0:00 AM		
	ø	Backup, Joey		00:00:00	00:00:00	00:00:00	00:00:00
	ø	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
\checkmark	-	Keeler, Matthew M.		40:00:00	128:00:00	00:00:00	168:00:00
\checkmark	-	Lierz, Ken	Lierz, Whitney	40:00:00	128:00:00	00:00:00	168:00:00
\checkmark	-	Lierz, Whitney		40:00:00	128:00:00	00:00:00	168:00:00
\checkmark	-	Tatro, Betty	Keeler, Matthew M.	40:00:00	128:00:00	00:00:00	168:00:00
\checkmark	-	Wolf, Hannah	Lierz, Whitney	40:00:00	128:00:00	00:00:00	168:00:00
\checkmark	-	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.

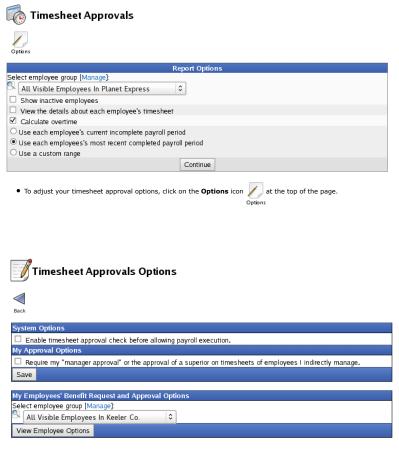
• To view a more detailed list of everyone's time at once, check the Select All box and click on the View Details button.

• 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



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.

Л	imesheet Approvals O	ptions		
	All emails are sent to the emplo	vyee's "Default Email A	.ddress"	
الله Back				
Employ	ee's Timesheet Approval Options			
Keeler, Larry Save B	indirectly manage. Send an email to this employed Send using the following temp Send an email to the default e that require approval when the em Send using the following temp	ee's default email addr plate : Use default te email address of the ployee's payroll period jate : Use default te default email address very hours until th mployee's timesheet	mployee, their direct manager, and a ends.	d by a manager. Il indirect managers er, and all indirect
Helper				
	is information: F	From this user:	To these users:	
Email o End of Additio		Keeler, Larry	Keeler, Larry	
Сору				
int	erval.		p notification emails and reminder	

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

X Payroll T	ype Administration			
H	(Create New Type		
	🔺 Type Name	Active	in Use	Delete
	Direct	M	X	
\bigtriangledown				100 0

To Add a Payroll Type

=		Create Ne	w Type			
Use this	form to create a new type for your select periods,		After creatin active for us		ie, you will be	e able to configure it's
Type Name	Use a different name for each group of en	nployees with Create T		roll perio	ds. Bi-Weel	dy
(+)	▲ Type Name Direct		Active		In Use	Delete
\bigtriangledown						100 🗢

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.

Add a descriptive name that is different for each group of employees with different payroll periods.
 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

		🔺 Type Name		Active	In Use	Delete
		Bi-Weekly		\checkmark		×
Gene	ral Employees	Schedule Day Defaults				
Em	ployee Payro	ll Type Name			Bi-Wee	kly
Pay	roll Export C	ode			26	
Allo	w Use					Yes 🗘
Exc	lude Release	d Employees in Payrol	Export			No 🗘
Pay	roll Periods				[BiWeekly 🗾
Bi-V	Veekly				01/01/201	3 12:00:00 AM
					🔊 Revert Row	Save Row
-		Direct		V	N	
∇						100 🗘

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

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.

O Click on the Save Row button to save the changes.

Employees

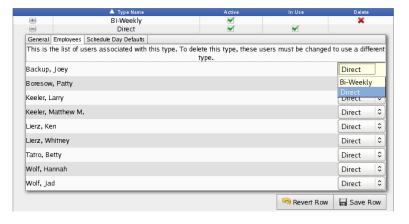
and time.

		🔺 Type Name		Active		In Use	Delete
		Bi-Weekly		V			×
General	Employees	Schedule Day Defaults					
This is f	the list of u	sers associated with this t	ype. To delete th type.	is type, the	se users	must be changed	to use a different
						🔊 Revert Row	🖬 Save Row
		Direct		V			
							100 \$

• 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

🔺 Type N	ame	Active			Delete	
Bi-Weel	kly				×	
General Employees Schedule Day Defa	aults					
Schedule Week Start				Sunday	12:00 AM	
Scheduled Hours				40.0000		
Reset Employee Specific Custor	n Settings		Reset Emp	loyee Specific (Custom Setting	
			L.	nevert Row	🔒 Save Ro	
Direct	t					
					100	

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.
 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

<u>Ж</u> о,	vertime Policies	
	Create a New Overtime Policy	
	Overtime Policies ▲ Existing Overtime Policies	
	Direct	
\bigtriangledown	100	0

Create a New Overtime Policy

Click on the + (plus) sign to the left of the Create a New Overtime Policy bar.

	Create a New Overtime Policy	
Name		Salary
	Add Overtime Policy	

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

Select the **Overtime Policy** by clicking the + (plus) sign next to the name.
 Adjust the information as necessary under the **General**, **Advanced**, and **Pay Overrides** tabs

General

	Overtime Policies	olicies
	Direct	
8	Salary (Needs Rev	view)
General Advanced P		
Approve Overtime	Policy	Approve Polic
Name		Salary
number of hours in	is soon as they have 40 qualifying hours within a wo a day before an employee's time is promoted to that any hours paid as Standardtime, Additional confi	at type.
number of hours in Qualifying hours a hours to not "coun can be designated If this overtime pol or Premium Time t		at type guration options can designate Standardtim juration options can designate Standardtim rormally would not. the Workweek Requirement for Doubletim Premium Time to 25. If this overtime policy
number of hours in Qualifying hours a hours to not "count can be designated If this overtime pol or Premium Time t should not pay ove Overtime to 25.	a day before an employee's time is promoted to the ure any hours paid as Standardtime. Additional config 'o qualify towards the requirements. Additionally to count towards meeting requirements when they r licy should not pay Doubletime or Premium Time, se to 169 and the Daily Requirement for Doubletime or f ertime, also set the Workweek Requirement for Over Pay Type Multipliers and Require Count Description of the State	at type. guration options can designate Standardtim jours paid at a higher type such as Overtim rormally would not. If the Workweek Requirement for Doubletim Premium Time to 25. If this overtime policy time to 169 and the Daily Requirement for rements
number of hours in Qualifying hours a hours to not "count can be designated If this overtime pol or Premium Time t should not pay over	a day before an employee's time is promoted to the re any hours paid as Standardtime. Additional confit to count towards the requirements. Additional with to count towards meeting requirements when they r licy should not pay Doublettime or Premium Time, set to 169 and the Daily Requirement for Doublettime or F ertime, also set the Workweek Requirement for Over Pay Type Multipliers and Requir Rate Multiplier Work	at type. gunation options can designate Standardtim tours paid at a higher type such as Overtim tormally would not. The Workweek Requirement for Doubletim Premium Time to 25. If this overtime policy time to 169 and the Daily Requirement for tweek Requirement Daily Requirement
number of hours in Qualifying hours a hours to not "count can be designated If this overtime pol or Premium Time t should not pay ove Overtime to 25.	a day before an employee's time is promoted to the re any hours paid as Standardtime. Additional confi- t" or qualify towards the requirements. Additional with to count towards meeting requirements when they r licy should not pay Doublettime or Premium Time, set to 169 and the Daily Requirement for Doublettime or entime, also set the Workweek Requirement for Over Pay Type Multipliers and Requir Rate Multiplier Work	at type. guration options can designate Standardtim jours paid at a higher type such as Overtim iormally would not. t the Workweek Requirement for Doubletin Premium Time to 25. If this overtime policy time to 169 and the Daily Requirement for rements week Requirement rs 25 hours

O 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.
 O 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 Requirements** 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

Advanced

for Overtime to 25.

Overtime Policies Existing Overtime Policies	
Direct Salary (Needs Review)	
General Advanced Pay Overrides Approve Overtime Policy	Approve Policy
This panel allows for the configuration of advanced overtime policy options. N settings on their default values.	lost organizations will leave these
168 Hour Workweeks	💌 168 Hour Workweek
Prorate Truncated Averaging Periods	Prorate Truncated Period
Combine Overlapping Long Workweeks	Combine Overlappin
California Seventh Day Overtime and Doubletime	No
All Work on 7th day of Workweek is Overtime/Doubletime	No
Daily (or Forced) OT/DT/PT Reduces Weekly Requirement for OT/DT/PT	Daily OT Reduces Requirement
Qualifies for Benefits That Count Towards Overtime	🗹 Qualifies For Benefit
Assign Overtime Requirements for Individual Work Days	Use Daily Requirement
	Set Requirements
	🔊 Revert Row 🛛 🔚 Save Row
	100

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 overlaping (and doubletime) calculated based on prorated overline rules. If unchecked, overline 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 the comparison of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S. Department of Labor (US), Field Operations Handbook 32j13(c) as of the calendar week in length will be calculated according to U.S.

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
- 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, "(flyhe seventh-day, the shistorically applied only if an employee worked on each of the days in the workweek." As explained by the author 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.

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
- a cload which an employee following and pointy **cloanter** for the left of the 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

Note: Changing these settings will invalidate any pending payroll exports that use this policy.								
	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	
Overtime:	25	25	25	25	25	25	25	
Doubletime:	25	25	25	25	25	25	25	
Premium Time:	25	25	25	25	25	25	25	

Click the Save button to impletment the change

O 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 reacer the option option of the server of 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 Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT Reduces Veekly Requirement for OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when combining this with the *Daily (or Forced) OT/DT/PT* and so or *N*. Inforce when

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.

Overtime Policies	licies	
Direct Salary (Needs Rev	iew)	
General Advanced Pay Overrides		
Approve Overtime Policy		Approve Policy
Employee pay calculations can be configured to be overridden when er certain shifts, during holiday observances or even on an individual even how these overrides are handled when an employee could potentially qu	nt basis. The options in this	panel define
If any of the override modes are set to "Higest Priority" then you must sources. For example you might want overrides from a job to always ta so you would set Job Priority to 1.		
Override Mode: Hourly Rate	Highest Priority	0
"Hourly Rate" Priority for Overrides From Event Override		1
"Hourly Rate" Priority for Overrides From Job		2 0
"Hourly Rate" Priority for Overrides From Holiday		3 3
"Hourly Rate" Priority for Overrides From Shift		4 3
Override Mode: Hourly Differential	Highest Priority	
"Hourly Differential" Priority for Overrides From Event Override	lingilest triancy	1
"Hourly Differential" Priority for Overrides From Job		2 0
"Hourly Differential" Priority for Overrides From Holiday		30
"Hourly Differential" Priority for Overrides From Shift		4 3
Override Mode: Rate Multiplier	Highest Priority	+ •
"Rate Multiplier" Priority for Overrides From Event Override	lighest monty	10
"Rate Multiplier" Priority for Overrides From Job		2 0
"Rate Multiplier" Priority for Overrides From Holiday		3 0
"Rate Multiplier" Priority for Overrides From Shift		4 0
Override Mode: Counts Towards Overtime	Highest Priority	
"Counts Towards Overtime" Priority for Overrides From Event Over	<u> </u>	1 0
"Counts Towards Overtime" Priority for Overrides From Job		2 0
"Counts Towards Overtime" Priority for Overrides From Shift		30
Override Mode: Type of Pay		
"Type of Pay" Priority for Overrides From Event Override	Highest Priority	
"Type of Pay" Priority for Overrides From Job		1 0
"Type of Pay" Priority for Overrides From Holiday		2 0
"Type of Pay" Priority for Overrides From Shift		3 0
"Type of Pay" Priority for Overrides From Overtime Policy		4 0
		5 <
	Revert Row	Save Row
		100

• 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;
(h) The number of hours generating 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) Holid
- 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	Рау Туре	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	🔀 Workweek Groups
ĭ	Create a new Workweek Group
	Show inactive groups This will display inactive Work Week Groups
	Active groups
	Existing Workweek Groups Direct
	Click on the + sign next to Create a new Workweek Group to expand the window. The Create a new Workweek Group screen will display.
	Create a new Workweek Group
	Workweek Group Name early birds
	Workweek Start 10/28/2013 01:57 PM CST (DST) \$
	Workweek Duration One calendar week
	Overtime Policy
	Add Workweek Group
	Add Workweek Group
	Enter the Workweek Group Name .
	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.
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.
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.
	Create a new Workweek Group
	Show inactive groups This will display inactive Work Week Groups
	Active groups ▲ Existing Workweek Groups
	Direct
	early birds

100 0

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.

		Active groups			
		Existing Workweek Groups			
Direct					
8		early birds			
Settings Employees					
Workweek Group N	Name: early bir	ds	Deactivate Group		
		Add Workweek Period			
Effective	e TZ	Duration	Overtime Policy Delete		
10/28/2013 01:57 F	PM CST (DST)	One calendar week	♦ Direct ♦ Delete		
			🔊 Revert Row 🛛 🔚 Save Row		
			100		

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.

Show inactive groups This will display inactive Work Week Groups							
Active groups Existing Workweek Groups							
8		Direct					
Settings Employees							
Workweek Group Name:	Direct		Deactivate Group				
	Add w	orkweek period					
Effective	Duration	Overtime Policy	Time Zone				
10/28/2013 02:08 PM	One calendar week	< │≎ Direct ≎	CST (DST)	0			
Add Period Hide Form							
Effective TZ Duration Overtime Policy Delete							
01/02/2011 12:00 AM	CST (DST)	One calendar week	Direct 🗘	Delete			

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.

Show in	active groups	This will display in	active Work Wee	ek Groups			
			P	ctive groups ▲ Existing Workweek Grou	ps		
-				Direct			
Settings	Employees						
Workv	week Group Na	ame:	Direct			Deactivate Group	
				Workweek Period			
	Effective		ΤZ	Duration		Overtime Policy	Delete
01/02	/2011 12:00 AM	M CST	(DST) 🗘	One calendar weel	< 0	Direct 🗘	Delete
10/28	/2013 02:13 PI	M CST	(DST) 🗘	One calendar week	()	Direct 🗘	Delete

Edit an Existing Workweek Period

1. Click on the + sign next to the Workweek Group name to expand the record.

		A	ctive groups ▲ Existing Workweek Groups		
			early birds		
Settings Employees					
Workweek Grou	p Name:	early birds		Deactivate Group	
		Add	Workweek Period		
Effec	tive	TZ	Duration	Overtime Policy	Delete
10/28/2013 01:5	7 PM CS	T (DST)	One calendar week	Direct 🗘	Delete
				🔊 Revert Row 🔓	Save Rov
					100

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.

🗆 Show in	Show inactive groups This will display inactive Work Week Groups						
	Active groups ▲ Existing Workweek Groups						
-	early birds						
Settings	Employees						
	week Group Name: Effective	early birds Add V TZ CST (DST)	Vorkweek Period Duration	Deactivate Group Overtime Policy Delete Direct \$ Delete			
				Revert Row Save Row			

NOTE: If the change you are making to the date affects a pending payroll, you will receive the following warning:

s	Prompt
р ЭО	Modifying this workweek period would invalidate payroll. Are you sure that you want to continue?
_	Yes No

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.

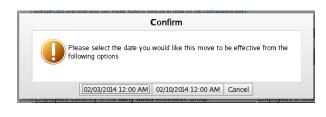
5. Click on the **Employees** tab to add or remove employees to/from this group.

Active gi Active gi	roups ting Workweek Groups
	Direct early birds
Settings Employees	early birds
Employees currently in the early birds Workweek Group:	Employees in other groups: Backup, Joey Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken Lierz, Whitney Tatro, Betty
Effective 02/07/2014 04:18 PM CST (DST)	On 02/07/2014 04:18 PM CST (DST) move selected to early birds Go
	🔊 Revert Row 🛛 🔒 Save Row

O 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:

Morkweek 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.

mployee then works 40 hours in Week 2 as w

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 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 of 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. 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.

Changing the pay or type of pay for any time: If the amount of pay or the 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 payrol trun, invalidating it.

 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:

pipe: A pay rate change (raise) Making a manual manual override on any time to a rate different than the employee's rate (set pay rate or differential) Changing worked time to/from a job that paid at a rate different than the employee's rate (set pay rate or differential)

4. 5. Changing worked time to/from a shift that paid at a rate different than the employee's rate (set pay rate or differential)

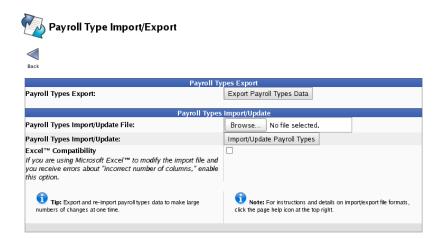
A changing worked time to/from a bind take paid at a fact underfail that the employee's rate (set pay fact or inferential)
 Changing worked time to/from a holiday that created a rate different than the employee's rate (set pay fact or inferential)
 Adding or removing paid piecework, tips, commissions or non-discretionary bonuses at any point in Workweek 2.
 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 iso. 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



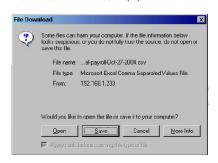
To Import Data

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

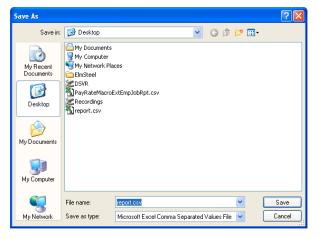
Click on the Export Payroll Types Data button.
 A File Download or similar window displays:



NOTE: Your screen may look different than the screen above, depending on your computer's operating system.

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

Time Edit/Report						
	·	3 B	Se		e's presets for this p	oage:
•, •, …, …,	.			🛰 Ke	eler, Matthew M.	\$
Today Yesterday This Week Last Wee	k This Month This Ye	ear Week By Day	Saved	I Presets: No	Preset Selected -	- 0
		Display Options				
Select Date Range		Tod	lay			\$
				From: 10/2	8/2013 12:00:00 AM	1
				To: 10/2	9/2013 12:00:00 AM	1
					In Employees' TZ	: 0
Select Employee or Group			🔍 🛛 All Visib	le Employees In	Keeler Co.	0
Select Report Column Preset [Det	ailed] [Summari	zed]		Automatic		٥
Show Advanced Options					Hide	0
	🔊 Reset 🛛 🔒	Save/Edit Preset	🛄 View Repo	rt		

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.	Today Yesterday This Week Last Week This Month This Year Week By Day Saved Presets: [Global]	r, Matthew M. 🗘
	Select Date Range [Global] [Global]	Today Yesterday
	T ^e [Global]	This Week Last Week
Generate a Report Manually • Select Date Range: Choose either a predefined or custom time		This Month This Year Week By Day
range in which to run the report. O Use the drop down menu to select a predefined range , such as "This week", "Last Month", and the current and last	Select Report Column Preset [Detailed] [Summarized] Automatic Show Advanced Options	() Hide (≎
completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.	Save/Edit Preset	Hide
	n select the date. This field can also be edited in place so just click in the box and type over the displayed da	

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.

	Display C	Options		
Select Date Range		Last Week		
Manually select a range of time selection.	for this report, or use the quick		From: 10/21/	2013 12:00:00 AM
				2013 12:00:00 AM
				In Employees' TZ
Select Employee or Group	oyee to run this report for. Selecting a	🔍 All Visible	Employees In k	Keeler Co.
such as a Job group will limit thi	s report to all of the Employees who ns can be used to set up these limits	are associated with that jol	b, but will not filter	results to time worke
Select Report Column Preset				
Select a pre-defined report pres		Auto	omatic	
Show Advanced Options Displays advanced report option	15			Hide
	🔊 Reset 🛛 🔓 Save/Edit F	Preset 🔲 View Report		
4	Time R			<u>ب</u>
▲ Employee	21 Oct 2013 to	28 Oct 2013	Total Ti	me Percentage
Backup, Joey			32:00	21.47%
Boresow, Patty			39:51	26.74%
Keeler, Larry			37:11	24.95%
Lierz, Ken			40:00	26.84%
7				100
×		-	Time Worked: 10	
			Benefit Time Used: 43	
			Holiday Time Earned: 0/	urs
			Total Time Earne	d/Worked: 149 <i>hrs</i> , 2

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.

<	2	Time R 21 Oct 2013 to		♦		
	🔺 Employee	Employee In Time and Location Out Time And Location				
		10/21/2013 07:41:03 AM CDT	10/21/2013 05:21:08 PM CDT			
•	Boresow, Patty			09:40:05	Edi	
			Clearwater: Master Station			
		10/22/2013 07:22:10 AM CDT	10/22/2013 04:42:12 PM CDT			
•	Boresow, Patty			09:20:02	Edit	
		User Administration	User Administration			
		10/23/2013 08:22:47 AM CDT	10/23/2013 05:03:50 PM CDT			
+	Boresow, Patty			08:41:03	Edi	
		User Administration	User Administration			
		10/24/2013 08:21:40 AM CDT	10/24/2013 05:31:42 PM CDT			
•	Boresow, Patty			09:10:02	Edit	
		User Administration	User Administration			
				100	o ≎	
∇						
_			Tin	e Worked: 36 hrs.	51 <i>m</i>	

Piecework View/Use Benefits Clock In/Out Now Add Clock In/Out Pair

				R	enefit Usage				
	🔺 Employee	Туре)ate	Time		Reason/Note for us	e of Benefit Hours	
۲	Boresow, Patty	Sick		5, 2013 00 AM	03:00:00				×
\bigtriangledown								100	٥
								Benefit Time Used:	3hr
					Holidays				
	🔺 Employee	Holiday	Date	Duration	Earned	Approval	Earr	ed/Approved Duration	
				No	Results Found				
								100	٥
$ \vee $									
								Holiday Time Earned:	0 hr
				Piece	work Complet	ed			
			🔺 Piecewor				Quantity	Total	
				No	Results Found				
\bigtriangledown								100	٥

Total Time Earned/Worked: 39 hrs, 51 min

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.

(Time Report 21 Oct 2013 to 28 Oct 2013								
🔺 Employee	In Tir	In Time and Location			Out Time And Location					
	10/21/2013	10/21/2013 07:41:03 AM CDT		10/21/2013 0	5:21:08 PM CDT					
Boresow, Patty	1					09:40:05	Ed			
				Clearwate	r: Master Station					
		8 07:15:10 AM CE	т	10/22/2013 0	4:42:12 PM CDT					
Boresow, Patty	/					09:27:02	Ed			
	User	Administration		User Ad	dministration					
Audit Approvals	Nork Order / Job Biom	etrics Clock Notes	Tracking Fields	Pay Override						
	10:19:04 AM CDT :t 22, 2013 at 7:22:10	0 AM CDT by "Ke	eler, Matthew	M." by clickir	ng "Add Clock In/Out	Pair"				
Oct 29, 2013 at 4										
🖉 "Keeler, Mat	thew M." changed R	eal Time In from	Oct 22, 2013 a	at 7:22:10 AN	I CDT to Oct 22, 201	3 at 7:15:10 AM (DT			
🖉 "Keeler, Mat	thew M." changed T	ime In from Oct	22, 2013 at 7:2	2:10 AM CDT	to Oct 22, 2013 at 7	7:15:10 AM CDT				
Out										
Oct 29, 2013 at .	10:19:04 AM CDT									
Clock Out on (Oct 22, 2013 at 4:42:	12 PM CDT by "	Keeler, Matthe	w M." by clic	king "Add Clock In/C	out Pair"				

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.

<	þ			Time Report 21 Oct 2013 to 28 Oct 2013							\Rightarrow
	Employee In Time and Location					Location	Out Time And Location			Duration	
	Boresow, Patty		10/21	10/21/2013 07:41:03 AM CD			10/21/2013 0	5:21:08 PM CDT			
									09:40:05	Edi	
								Clearwater	: Master Station		
	Audit	Approvals	Wor	Corder / Job	Biometrics	Clock Notes	Tracking Fields	Pay Override			
						F	Approval Detai	ils			
	Time						Approver			Note	
	October 29, 04:59:16 PM				Keeler, Matthew M. Forced ap			rova	- 1		

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.

<	;	Time Report 21 Oct 2013 to 28 Oct 2013							\Rightarrow
	🔺 Employee		In Time and	Location		OutTim	e And Location	Duration	
		10/21/	2013 07:4	1:03 AM CD	т	10/21/2013 (05:21:08 PM CDT		
	Boresow, Patty						09:40:05	Edit	
						Clearwate	r: Master Station		
	Audit Approvals Wor	k Order / Job	Biometrics	Clock Notes	Tracking Fields	Pay Override			
	Work Orde	r							
	remodel								
									_
	Work Orde	r Job							
	paint								
		_							-
	Work Orde	r Comp	etion						
	30								- 1

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.

В	Boresow, Patty			J/2013 10:0	1:18 AM CE		10/30/2013 :	00:00:20	Edit			
					A00000512000000			A00000512000000				
Aud	it Appro	ovals	Work	Order	/ Job	Biometrics	Clock Notes	Tracking Field	Pay Override			
1.1												
	n											
_	0 opti	с										
10		c										

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.

<	ļ			\Rightarrow					
	🔺 Employee		In Time and	Location		OutTim	e And Location	Duration	
		10/30	/2013 08:0	0:18 AM C	от	10/30/2013	L0:01:38 AM CDT		
	Boresow, Patty							02:01:20	Edit
			A00000512000000			A0000			
	Audit Approvals V	/ork Order / Job	Biometrics	Clock Notes	Tracking Fields	Pay Override			
	Clock In	Note							
	sorry, got here a								
	,- g								
	Clock Ou	t Note							
	1337								
									_
	Last Aud	it Note							
	forgot to clock i	n							
									_

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.

Employee	Time R 21 Oct 2013 to In Time and Location	Duration	♦	
Boresow, Patty	10/21/2013 07:41:03 AM CDT	Out Time And Location 10/21/2013 05:21:08 PM CDT	09:40:05	Edit
Audit Approvals Work	Order / Job Biometrics Clock Notes Tracking	Clearwater: Master Station		
Type of Pay				
Piecework	•			
Counts towa	ards Overtime			-
Hourly Rate				
20.00				٦.
Hourly Diffe	rential			
Rate Multipl	ier %			-

Advanced Operation

By Showing Advanced Options on the Control Panel, you can enable additional options for advanced operation.

Display O	ptions
Select Date Range	This Week 🗘
	From: 10/28/2013 12:00:00 AM
	To: 11/04/2013 12:00:00 AM
	In Employees' TZ 🗘
Select Employee or Group	🔍 🛛 All Visible Employees In Keeler Co. 🔷
Select Report Column Preset [Detailed] [Summarized]	Automatic
Show Advanced Options	Show 🔳
Filter by Work Order	In 🗢 No Workorder Filter
Filter by Job	In 🔷 No Job Filter 🗘
Group Summary by	Employees 🗘
Time Grouping	No Group 🗘
Additional Options	Time 🗹 Include Holiday Time 🗹 Include Piecework Events
C (Sum	mary Report) Show percents relative to the most time worked.
🥱 Reset 🛛 🔒 Save/Edit F	Preset 🛄 View Report

- Selecting "Show" Advanced Options enables advanced options and expands the window to display additional controls.
 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

O Selecting a specific work Order informed and win buy show the worked on that specific work Order and win update the Jobs inter to contain jobs and segments of jobs configured for the selected Work Order.
 O 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.
 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.

- O 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.
 O Grouping by Jobs will return a result for each Employee, with a summary of that Employee's Time.
 O Grouping by Jobs will return entries for all the jobs worked in the selected time.
 O Grouping by Jobs will return entries for all the jobs worked in the selected time.
 O Grouping by Jobs will return entries for all the jobs 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.
 O 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 reput range.
 - 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).

Display	Options
Select Date Range	Last Week 🗘
	From: 10/21/2013 12:00:00 AM
	To: 10/28/2013 12:00:00 AM
	In Employees' TZ 🗘
Select Employee or Group	🕄 Boresow, Patty 🗘
Select Report Column Preset [Detailed] [Summarized]	Automatic
Show Advanced Options	Show
Filter by Work Order	In 🗘 No Workorder Filter
Filter by Job	In 🗘 No Job Filter 🗘
Group Summary by	Employees 🗘
Time Grouping	Grouping
Group Starting At	12:00 AM
Group Ranges	24:00:00
Additional Options	t Time 🗹 Include Holiday Time 🗹 Include Piecework Events
🗆 (Sur	mmary Report) Show percents relative to the most time worked.
🔊 Reset 🛛 🔒 Save/Edit	Preset 🛄 View Report

		Time Repo 21 Oct 2013 to 28	\$
۲	Monday, 21 Oct 2013 12:00:00 AM	31.69%	12 hrs, 40 min
٠	Tuesday, 22 Oct 2013 12:00:00 AM	31.15%	12 hrs, 27 min
۲	Wednesday, 23 Oct 2013 12:00:00 AM	29.23%	11 hrs, 41 min
٠	Thursday, 24 Oct 2013 12:00:00 AM	30.44%	12 hrs, 10 min
۲	Friday, 25 Oct 2013 12:00:00 AM	7.51%	3 hrs
۲	Saturday, 26 Oct 2013 12:00:00 AM	7.51%	3 hrs
٠	Sunday, 27 Oct 2013 12:00:00 AM	7.51%	3 hrs
\bigtriangledown			100 🗘
			Time Worked: 36 hrs, 58 min

Piecework View/Use Benefits Clock In/Out Now Add Clock In/Out Pair

					enefit Usage				
	🔺 Employee	Type		ate	Time		Reason/Note for use of Ber	efit Hours	
۲	Boresow, Patty	Sick		5, 2013 00 AM	03:00:00				×
∇								100	0
v								Benefit Time Used:	3h
					Holidays				
	🔺 Employee	Holiday	Date	Duration	Earned	Approval	Earned/App	oved Duration	
				No	Results Found				
								100	0
\sim									
								Holiday Time Earned:	0 <i>hr</i>
					work Complet	ed			
			Piecework				Quantity	Total	
				No	Results Found				
								100	\$
\vee									
							Time Worked: 36	hrs, 58 min	
							Benefit Time Used:		
							Holiday Time 07 Earned:	ns	

Total Time Earned/Worked: 39 hrs, 58 min

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.

4			Time Rep 21 Oct 2013 to 21			\$
	Monday, 21 Oct 2	013 12:00:00 AM	31.69%			12 hrs 40 mir
			Detailed Emplo	vee Report		
	Employee	In Time and Lo		Out Time And Location	Duration	
		10/21/2013 07:41:0	3 AM CDT	10/21/2013 05:21:08 PM CDT		
	Boresow, Patty				09:40:05	Edit
				Clearwater: Master Station		
_	7				100) ¢
٠	Tuesday, 22 Oct 2	013 12:00:00 AM	31.15%			12 hrs, 27 mir

Create New Preset

Time Edit/Report						
		9	Sele		's presets for th	
• • • •	.			🗠 Kee	eler, Matthew I	м. 🔍
Today Yesterday This Week Last Week	This Month This Year	Week By Day	Saved P	resets: No	Preset Selecte	ed 🗘
Display Options						
Select Date Range		Tod	ay			0
				From: 10/28	/2013 12:00:00	AM
				To: 10/29	/2013 12:00:00	AM
				(In Employees'	TZ ♀
Select Employee or Group			🔍 🛛 All Visible	Employees In	Keeler Co.	•
Select Report Column Preset [Detai	Select Report Column Preset [Detailed] [Summarized]					0
Show Advanced Options					Hi	de 🗘
	🔊 Reset 🛛 🔒 Sa	we/Edit Preset	🛄 View Report]		

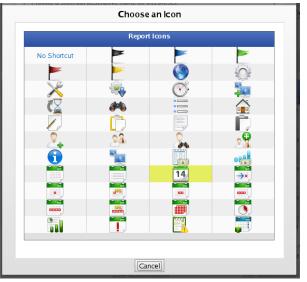
• Set the Display Options the way you want them to be in the report.

• Click the **Save/Edit Preset** button at the bottom of the window.

Name Provide a short but descr	Preset Options	Last Week Keeler Co
	hen ordering presets on th numbers will be displayed	
Default Preset If checked, this preset will loaded.	l be selected when the pag	e is first
Run Immediately If checked, the preset will	be activated when you sel	ect it.
Preset Shortcut Presets will be available icon to use as a shortcut	in a selectable list. You can for this preset.	n also select an 11 [Edit
Preset Visibility Select the visibility of this	preset.	Personal Preset \$
Personal Report For This is the employee for w preset will be saved	whom this personal	Keeler, Matthew M. 🗘

• 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.

2

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

Time Edit/Report						
Today Yesterday This Week Last Wee	k This Month This Ye			S Ke	e's presets for this p eler, Matthew M. Preset Selected	\$
		Display Option:	5			
Select Date Range		To	day			0
				From: 10/2	8/2013 12:00:00 AM	
				To: 10/2	9/2013 12:00:00 AM	
					In Employees' TZ	•
Select Employee or Group			🔍 🛛 All Visible	e Employees In	Keeler Co.	\$
Select Report Column Preset [Deta	ailed] [Summari	zed]		Automatic		0
Show Advanced Options					Hide	•
	🔊 Reset 🔒	Save/Edit Preset	View Report			

DETAILED REPORT PRESETS

• From the Time Edit/Report, click [Detailed] to open the preset control panel.

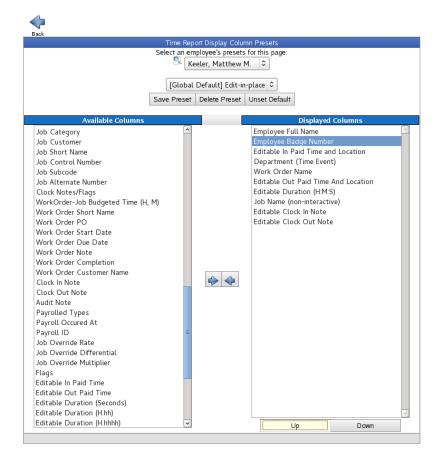
Manage detail report column presets.



• 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.

	Name	
	Enter a name for this preset: Edit-in-place	
	OK Cancel	
• Type in a desc	iptive name and click OK .	

	Prompt	
	Please click the appropriate button to save "Edit-in-place"	
as Pers	onal Presetas Division Presetas Global Preset Cancel	

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

SUMMARIZED REPORT PRESETS

Time Edit/Report						
Today Yesterday This Week Last Wee	k This Month This Year	Week By Day		elect an employee's Keele I Presets: No P	er, Matthew M.	\$
	Di	isplay Options				
Select Date Range Today					0	
				From: 10/28/2	2013 12:00:00 AM	
				To: 10/29/2	2013 12:00:00 AM	
				li	n Employees' TZ	0
Select Employee or Group			🔍 🛛 All Visib	le Employees In K	eeler Co.	\$
Select Report Column Preset [Deta	ailed] [Summarized]		Automatic		0
Show Advanced Options					Hide	0
	🥱 Reset 🛛 🔒 Sav	ve/Edit Preset	🛄 View Repo	rt		

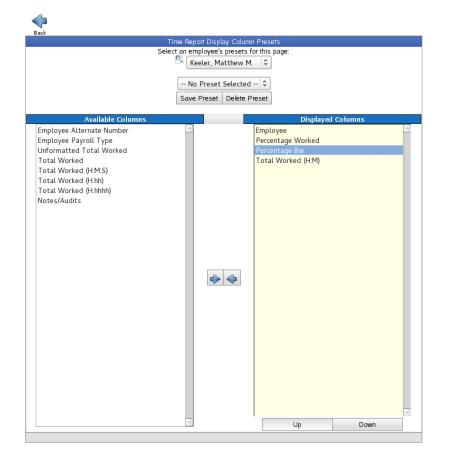
• From the Time Edit/Report, click [Summarized] to open the preset control panel.

Manage summary report column presets.

Back	Time Report Display Colur	n Presets	
	ect an employee's presets		
	🥄 Keeler, Matthew N	1. 🗢	
	No Preset Selected	1 C	
	Save Preset Delete I	Preset	
	Bave Heser Beleter	(c)ct	
Available Columns		Displayed	l Columns
Employee	<u>~</u>		^
Employee Alternate Number			
Employee Payroll Type			
Percentage Worked			
Percentage Bar			
Unformatted Total Worked			
Total Worked			
Total Worked (H:M)			
Total Worked (H:M:S)			
Total Worked (H.hh)			
Total Worked (H.hhhh)			
Notes/Audits			
			<u> </u>
1	1	Up	Down

• 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.

Name	
Enter a name for this preset: Percentage Sum	
OK Cancel	

IOFKER IH DDI	Prompt		
	Please click the appro "Percenta	priate button to save ge Sum"	
 as Personal Preset	as Division Preset	as Global Preset	Cancel

• 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.



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

Time Edit/Report							
Today Yesterday This Week Last Wee		his Year Week By Day		ect an employee's presets for Sector Matthe Reeler, Matthe Presets: No Preset Sele	ew M.	0	
Display Options							
Select Date Range			Today			٥	
				From: 10/28/2013 12:00 To: 10/29/2013 12:00 In Employe	:00 AM	0	
Select Employee or Group			🔍 🛛 All Visibl	e Employees In Keeler Co.		0	
Select Report Column Preset [Detailed] [Summarized] Automatic						٥	
Show Advanced Options						٢	
	🥱 Reset	🔒 Save/Edit Pres	set 🔲 View Report				

• Generate the report to include the employee's time you wish to view or edit. (See the <u>Time Edit/Report article</u> for step-by-step instructions.)

In the example below, we are looking at Patty's time for yesterday.

	Display O	ptions		
Select Date Range		Yesterday		0
		From: 10/30/	2013 12:00:00 A	м
		To: 10/31/	2013 12:00:00 A	м
			In Employees' T	z 🔉
Select Employee or Gro	սթ	S Boresow, Patty		0
Select Report Column P	reset [Detailed] [Summarized]	Automatic		0
•		Automatic		~
Show Advanced Option:	5		Hide	e 0]
	🔊 Reset 🛛 🔓 Save/Edit P	reset 🔲 View Report		
4	Time Re 30 Oct 2013 to 3			\Rightarrow
🔺 Employee	In Time and Location	Out Time And Location	Duration	
	10/30/2013 08:00:18 AM CDT	10/30/2013 10:01:38 AM CDT		
 Boresow, Patty 			02:01:20	Edit
	A00000512000000	A00000512000000		
Boresow, Patty	10/30/2013 10:05:05 AM CDT	10/30/2013 11:59:18 AM CDT	01:54:13	Edit
Bolesow, Fally	A00000512000000	A00000512000000	01.54.15	Ean
∇			100)

View 1 deleted event. Piecework View/Use Benefits Clock In/Out Now Add Clock In/Out Pair

• 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.

4		Time Report 2013 to 31 Oct 2013		\$
🔺 Employee	In Time and Location	Out Time And Location		Duration
	10/30/2013 08:00:18 AM CDT	10/30/2013 10:01:38 AM		
🖶 Boresow, Patty			02:01:20	D Edi
	A00000512000000	A00000512000000		
	10/30/2013 10:05:05 AM CDT	10/30/2013 11:59:18 AM	CDT	
🖶 Boresow, Patty				01:54:13 Edi
	A00000512000000	A00000512000000		
\bigtriangledown				100 🗘
				Time Worked: 3 hrs, 56 mi
	View 1 deleted event. Piece	work View/Use Benefits	Clock In/Out Now	Add Clock In/Out Pair

• 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.

Add Event for Boresow, Patty Time In: Time Out: CST CST Location: Administration Section Location: Administration Section Select Location Type \$ Select Location Type \$ Department: No Department \$ Work Order: None \$ Current Job Completion: % Job: Unassigned \$ Clock Note (In): Fintered when clocking in by the enployee. For example: jobnate+-jobnum?badgenum Dight the enployee. For example: jobnate+-jobnum?badgenum	Time Report			
Time In: Time Out: CST CST Location: Administration Section - Select Location Type \$ Department: No Department \$ Work Order: None \$ Current Job Completion: >% Job: Unassigned \$ Clock Note (In): Entered when clocking in by the employee. For example: induction - None Selected Jobnate-+jobnum badgenum		Add Event for	Boresow. Patty	
Location: Administration Section	Time In:			
Select Location Type \$ Select Location Type \$ Department: No Department \$ Work Order: None \$ Current Job Completion: % Job: Unassigned \$ Clock Note (In): Entered when clocking in by the employee. For example: jobnote+-jobnum badgenum Clock Note (Out): Entered when clocking out. Tracking Fields (In): Transportation None Selected \$ Tracking Fields (Out): Supplies None Selected \$ Audit - Last Audit Note: Audit Note: Type Of Pay Follow Overtime Policy Rules Type Of Pay Follow Overtime Policy Rules Hourly Rate Hourly Rate Hourly Differential		CST	CST	
Department: No Department \$ Work Order: None \$ Current Job Completion: % Job: Unassigned \$ Clock Note (In): % Entered when clocking in by the employee. For example: jobnote+-jobnum'badgenum	Location: Administration	Section	Location: Administration Section	
Work Order: None - © Current Job Completion: % Job: Unassigned © Clock Note (In): Entered when clocking in by the employee. For example: jobnote+-jobnum badgenum Clock Note (Out):	Select Location Ty	pe 🗘	Select Location Type 🗘	
Current Job Completion: 7% Job: Unassigned C Clock Note (In): 7% Entered when clocking in by the employee. For example: 1 pobnote+-jobnum'badgenum Clock Note (Out): 1 Entered when clocking out. 1 Transportation None Selected C Tracking Fields (In): Transportation None Selected C Tracking Fields (Out): Supplies None Selected C Audit - Last Audit Note: 1 Audit - Last Audit Note: 1 Audit Note: 1 Pay Type Override: Type Of Pay Follow Overtime Policy Rules C Counts Toward Overtime Follow Overtime Policy Rules C Hourly Rate 1 Pay Override: Hourly Differential 1	Department:	No Department 3		
Job: Unassigned Clock Note (In): Entered when clocking in by the employee. For example: jobnote+-jobnum'badgenum Clock Note (Out): Entered when clocking out. Tracking Fields (In): Transportation None Selected Tracking Fields (Out): Supples None Selected Consumed None Selected Consumed None Selected Audit - Last Audit Note: Audit - Last Audit Note: Type Of Pay Follow Overtime Policy Rules C Counts Toward Overtime Follow Overtime Policy Rules C Hourly Rate Hourly Differential	Work Order:	None 🗘		
Clock Note (In): Entered when clocking in by the employee. For example:	Current Job Completion:	%		
Entered when clocking in by the employee. For example: johnote+-johnum*badgenum Clock Note (Out): Entered when clocking out. Tracking Fields (In): Tracking Fields (In): Tracking Fields (Out): Tracking Fields (Out): Tracking Fields (Out): Tracking Fields (Out): Consumed None Selected Consumed None Selected Consumed None Selected Audit - Last Audit Note: Audit - Last Audit Note: Audit Note: Type Of Pay Type Of Pay Follow Overtime Policy Rules Hourly Rate Hourly Rate Hourly Differential	Job:	Unassigned 🗘		
Entered when clocking out. Transportation None Selected Image: Consumed Co	Entered when clocking in by the employee. For example:			
Tracking Fields (Out):				
Audit - Last Audit Note:	Tracking Fields (In):		ne Selected 🗘	
Audit Note:	Tracking Fields (Out):			
Pay Type Override: Type Of Pay Follow Overtime Policy Rules Counts Toward Overtime Follow Overtime Policy Rules Hourly Rate	Audit - Last Audit Note:			
Pay Type Override: Counts Toward Overtime Follow Overtime Policy Rules Hourly Rate	Audit Note:			
Counts Toward Overtime Follow Overtime Policy Rules		Type Of Pay	Follow Overtime Policy Rules	
Pay Override: Hourly Differential	Pay Type Override:	Counts Toward Overtime	Follow Overtime Policy Rules	
		Hourly Rate		
Rate Multiplier %	Pay Override:	Hourly Differential		
		Rate Multiplier	%	
Tip: When editing an event while the employee is still clocked in, do not select anything for "Date/Time Out" to kave them clocked in.	still clocked in, do not select anything fo			
Update Cancel		Update	Cancel	

• 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

-		Time R 30 Oct 2013 to			\$
	Employee	In Time and Location	Out Time And Location	Duration	
		10/30/2013 08:00:18 AM CDT	10/30/2013 10:01:38 AM CDT		
B ore	esow, Patty			02:01:20	Edit
		A00000512000000	A00000512000000		
		10/30/2013 10:05:05 AM CDT	10/30/2013 11:59:18 AM CDT		
 B ore 	esow, Patty			01:54:13	Edit
		A00000512000000	A00000512000000		
		10/30/2013 12:05:05 PM CDT	10/30/2013 05:06:12 PM CDT		
 Bore 	esow, Patty			05:01:07	Edit
		User Administration	User Administration		
				100	o 🗘
×.			T	ne Worked: 8 hrs.	57 mii
				ne worked: onrs,	57 m

View 1 deleted event. Piecework View/Use Benefits Clock In/Out Now Add Clock In/Out Pair

• Clicking Edit will take you to the Time Edit interface where the clock can be modified or even deleted.

🔊 Time Report

	Edit Event for	Boresow, Patty		
ті	me In:	Time Out:		
10/30/2013 08	8:00:18 AM CST	10/30/2013 10:01:38 AM CST		
Location: AC	00000512000000	Location: A00000S12000000		
Select Loo	cation Type 🗘	Select Location Type 🗘		
Insert Before	Delete Insert After	Insert Before Delete Insert After		
Department:	No Department	0		
Work Order:	None ≎			
Current Job Completion:	%			
Job:	Unassigned 🗘			
Clock Note (In): Entered when clocking in by the employee. For example: jobnote++jobnum*badgenum	sorry. got here at 8am			
Clock Note (Out): Entered when clocking out.	1337			
Tracking Fields (In):	Transportation No Method	one Selected 🗘		
Tracking Fields (Out):	Supplies Consumed No	one Selected 🗘		
Audit - Last Audit Note:	Last Audit Note: forgot t <i>View Full Audit</i>	o clock in		
Audit Note:		ii.		
	Type Of Pay	Follow Overtime Policy Rules		
Pay Type Override:	Counts Toward Overtim	e Follow Overtime Policy Rules		
	Hourly Rate			
Pay Override:	Hourly Differential			
	Rate Multiplier	%		
Tip: When editing an estill clocked in, do not select Out" to leave them clocked		i Tip: After selecting the date and time, click anywhere outside of the calendar to close it.		
	Update Split Insert B	Break Cancel Delete		

1. Click in the $\mbox{Time In}$ or $\mbox{Time Out}$ 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.

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

	Add a N	ew Division	
			🗆 Show Inactive Div
	Division Name	Domain Name/Remote	Login URL Identifier
	Keeler Co. (Top Level Division)	yourdiv.exa	ample.com
Company Info	Warn if editing time in the past:		30
General	• ·		
Domain URL	Warn if editing time in the future:		1
Managers	Warn if editing time results in excess dura	tion:	24
Employees	Warn if editing time results in excess diffe	ronce between paid time and	
Clocks	"real time":	rence between paid time and	4
Settings	Show "Real Time" in addition to "Paid Tin	a " in Time Edit	
Directory	Show "Real Time" in addition to "Paid Tin	ne" in Time Ealt	Yes
Security	Warn on time overlap		Yes
Login	want on time overlap		No
Errors			NO
Alerts			
Time Edit			
Appearance			
Page Titles New Employee			
Defaults			
Employee			
Default			
Settings			
Alternate Login			
Cleanup			
		5 F	Revert Row 🛛 🔚 Save Ro
			•••
	Programmers	programmers (I	
	Seinfeld	seinfeld (UR	L Identifier)
			100

• 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.

Time Report

Edit Event for	Boresow, Patty
Time In:	Time Out:
Paid: 10/30/2013 08:00:18 AM CST	Paid: 10/30/2013 10:01:38 AM CST
Real: 10/30/2013 08:00:18 AM CST	Real: 10/30/2013 10:01:38 AM CST
Location: A00000S12000000	Location: A00000S12000000 Select Location Type \$
Insert Before Delete Insert After	Insert Before Delete Insert After

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
- Paid time: the paid time for clocking injout is used to generate reports and payoli. In its time can be adjusted by rounding, snapping, manual edits or other schedule-based modification. When using IPSDBRO, paid time is stored in the adjittimeIn and adjittimeOut 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 trimeOut 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

	Report Option	s			
Select Date Range	Т	oday			٥
		Fro	om: 10/31/2013 12:	00:00 AM	CDT
			To: 11/01/2013 12:	00:00 AM	CDT
Select Employee or Group		🔍 🛛 All Visible E	mployees In Keel	ler Co.	٥
☑ Worked Time ☑ Scheduled Time	🗆 Holiday Time	🗆 Benefit Time	🗆 Real Time	🗆 Violat	ions
Show Empty Days		Show Empty Em	ployee Graphs		
Snapping				1 Minute	0
Day Range		09:00:00 AM	05:00:00	PM	
Display				View F	leport

- 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.

·····		Report O	Juons		
Select Date Range			Custom Range		0
				From: 10/22/2013 12:	
Select Employee or Grou	n			To: 10/23/2013 12:	
		_	Autorisi	ble Employees In Kee	
☑ Worked Time 🛛 🗆 Show Em	Scheduled Time	🗆 Holiday Tim		ne 🗌 Real Time / Employee Graphs	Violations
Snapping			,,r,		1 Minute
Day Range			09:00:00 AM	05:00:00	PM
Display					View Report
	Benefit Time.			Holiday Time.	
•					
Tuesday, 22 October 2013 9 30 10 00 10 30 Backup, Joey	11,00 11,30 12	00 12 30 1 0	0 1 30 2 00 2	30 3 00 3 30	4 00 4 30
9 30 10 00 10 30 Sackup, Joey	11,00 11,30 12	00 12 30 1 0		30 3 00 3 30	4 00 4 30
9 30 10 00 10 30 ackup, Joey Soresow, Patty					
9 30 10 00 10 30 Sackup, Joey 3oresow, Patty					
9 30 10 00 10 30					

On the Visual Report, the bars represent spans of time.

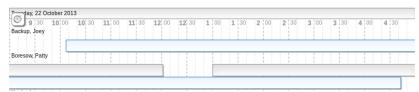
Edit a Time Event

If the span of time is fully contained within the **Day Range** set, the time spans can be altered.

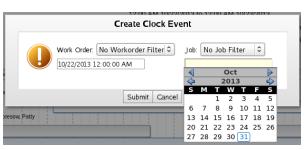
- Click the center of a bar and drag to move it.
 Click the edge of a bar and drag to lengthen or shorten the span of time.

Add a Time Event

Click on the person's name. An image of a clock appears.



Click on the clock image of 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		
A Report Name	Description		
Audit Report	Clocking Shows all edits and automated changes to time events for a selected span of time		
	t 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.		
\bigtriangledown			

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: This Week From 10/28/2013 12:00:00 AM To 11/04/2013 12	00:00 AM
From 10/28/2013 12:00:00 AM To 11/04/2013 12	:00:00 AM
Show audits Made on the selected e	mployees 🗘
Selected Employees All Visible Employees In Keeler C	Co. 0
Show for	Clock In
	Clock Out
	Event 🖂
Show audits created by Batch	time entry 🖄
Group	clock
Time e	
	Report
User C	
	Report 🖂
Show audits affecting Pay of	options 🦳
Time	
Time	
Time	
Submit	order/job 🖂

- 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 ate 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	ltem 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 "".
\bigtriangledown						100 0

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

A Report Name	Special Reports Description		
Keport Name	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.		
\bigtriangledown			

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

T Employee Summary Report

Display Options				
Select Date Range	Last Week	\$		
	From: 10/21/2013 12:00:00 AM	CDT		
	To: 10/28/2013 12:00:00 AM	CDT		
Select Employee or Group	🔍 All Visible Employees In Keeler Co.	\$		
Work Order Column	🗹 Include Wo	k Order		
	Uiew Report			

- Select Date Range: Choose either a predefined or custom time range in which to run the report.

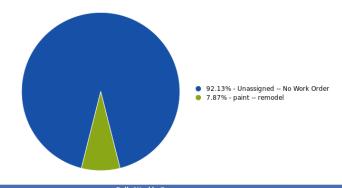
 Use the drop down menu to select a predefined range, such as "This week", "Last Month", and the current and last completed periods for your configured payroll types. You can use this selector to quickly access the most commonly used time ranges.
 You can also select a custom date range using the From 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 Sur	mmary	
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 Su	ummary	
Job Name	Time Worked Percentage of Total	

Job Na	ime	Time Worked	Percentage of Total
Unassigned No Work Order	11	13:10:51	92.13%
paint remodel	09	9:40:05	7.87%
Total	Ľ	22:50:56	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.

	Special Reports
A Report Name	Description Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
1	t 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
Hold Order Report	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.
Worked Months	

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

5 Special Reports
Missing Clockout Report
Select a range of time to view: 10/25/2013 to 11/01/2013
Enter the Missing Clockout time Weekdays: 10 🗘 : 30 🎝 PM 🕏
Enter the Missing Clockout time Saturday: 6 0 PM 0
Enter the Missing Clockout time Sunday: 6 0: 30 PM 0
Select employee group [Manage]:
All Visible Employees In Keeler Co.
Run 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 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 P	eriod	Period of Oct, 25 2013 through Nov, 01 2013					Nex	t 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 <u>Custom Reporting</u> and IPSSITE <u>Site Management</u>

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

🚺 Special Reports

A Report Name	Special Reports
	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Repor	t 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.
\bigtriangledown	

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



• 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



Sample Report

	A	В	С	D	E	F	G	Н	1
1	Site:	Summary				F	teport Range:	10/21/2013 - 1	0/27/2013
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	0.0

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.

• <u>Google Docs</u> 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. (<u>Sun Plugin | Community Plugin</u>)
• 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		Per-Employee Tags
Tag	Replacement	Tag	Replacement
{SITENAME}	Site Name	{FIRSTNAME}	First Name
{SITECODE}	Site Code	{MIDNAME}	Middle Name
{DAY[#]}	Date for specified day, in 01/01/2007 format	{LASTNAME}	Last Name
{DAY(format)[#]}	Date for specified day, with a user-provided format (format codes)	{PREFNAME}	Preferred Name
{ST_ALL}	Total standard time hours worked at site	{FULLNAME}	Full Name (see Master Configuration)
{ST_ALL[#]}	Total standard time hours worked at site on specified day	{ST}	Total standard time hours worked by employee
{OT_ALL}	Total overtime hours worked at site	{ST[#]}	Total standard time hours worked by employee on specified day
{0T_ALL[#]}	Total overtime hours worked at site on specified day	{0T}	Total overtime hours worked by employee
{DT_ALL}	Total doubletime hours worked at site	{0T[#]}	Total overtime hours worked by employee on specified day
{DT_ALL[#]}	Total doubletime hours worked at site on specified day	{DT}	Total doubletime hours worked by employee
{HOURS_ALL}	Total hours worked at site	{DT[#]}	Total doubletime hours worked by employee on specified day
{HOURS_ALL[#]}	Total hours worked at site 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

A Report Name	Special Reports
Keport Name	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Repor	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.
\bigtriangledown	

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



- 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:



Default Job Report

The TimeIPS Default Job Report provides a way to see employees who are not working on their default job.

	Special Reports
A Report Name	Description
Audit Desert	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
	t 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.
\bigtriangledown	

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:

overage Report Default Job	Statu	
paint	Clocked	l Out
sheet rock	Clocked	Out
sheet rock	Clocked	l 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

1

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

A Report Name	Special Reports Description
	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Repor	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 Employee Information, click on: Employee Report Card

Employee Report Card	
Select Employee:	
Run Report	

• 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			1		
11/17/2011				2	-
Employment Duration	on		10	1	6
1 Years 11 Months 22 [Days			MAR	
Last Review			500		
Not yet reviewed				1	
Last Pay Change				01	
By : Unknown Amount : When : Never		1	2	2	
		l Benefit Time			
Benefit Name	Month To Date	Last Month	Last Quarter	Year to Date	Last Year
Sick	-	3h	-	Зh	
Vacation	-	-	-	-	-
		edule 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
		abor Hours			
Туре	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:

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 guick way to see a hierarchical view of employees that report to other employees in an organization.

	Special Reports
🔺 Report Name	Description
	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
	t 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.
\bigtriangledown	

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 Field	ts
۲ D	Title		Organizational Unit
□ E	3adge Number		Alt Number
		Display Opti	ions
	Show Inactive		
View			
 Lierz, Wolf, A list of To Show 	hew M. r, Larry Betty Jad ev ow, Patty		
		Come Ciale	

		Extra Field	is
	Title	\checkmark	Organizational Unit
\checkmark	Badge Number		Alt Number
		Display Opti	ons
	Show Inactive		
View			
- Keeler, M · Ke · Ta · Wo - Lierz, Wh · Bo · Lie	loey, Family, 1008 latthew M., Administration, 1000 eler, Larry, Family, 1003 ror, Betty, Family, 1002 off, Jad, Friends, 1006 itmey, Administration, 1001 resow, Patty, Family, 1005 rz, Ken, Family, 1004 off, Hannah, Friends, 1007		

- 262 of 529

- 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

A Report Name	Special Reports 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.
\bigtriangledown	

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

		Show Inactive Employees
	Absentee Report	
Select a range of time to view: 11/04/2013	to 11/11/2013	
Select employee group [Manage]:		
All Visible Employees In Keeler Co.		
Run Report		

1. Select a range of time to view from the drop-down calendars or type over the date displayed.

		Show Inactive Employees
Abs	entee Report	
Select a range of time to view: 10/21/2013 to	11/11/2013	
Select employee group [Manage]:	Nov D	
🔍 All Visible Employees In Keeler Co. 🔷 🗘	♀ 2013 ♀ S M T W T F S	
Run Report	1 2	
	3 4 5 6 7 8 9	
	10 11 12 13 14 15 16	
	17 18 19 20 21 22 23	
	24 25 26 27 28 29 30	

 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.

			Show Inactive Empl
		Absentee Report	
lect a range of time to view: 10/21/2013		to 10/25/2013	
lect employee group [Manage]:			
All Visible Employees In Keeler Co.			
Employee Groups	$\left[\right. \right]$		
All Visible Employees In Keeler Co.			
All Visible Employees I Manage			
Custom Group Presets			
[Global] All Active Employees			
parents			
[Division-Keeler Co.] Tardy Report			
Active Employees			
Backup, Joey	=		
Boresow, Patty			
Keeler, Larry			
Keeler, Matthew M.			
Lierz, Ken			
Lierz, Whitney			
Tatro, Betty			
Wolf, Hannah			
Wolf, Jad			
Payroll Types			
All Bi-Weekly Employees			
All Direct Employees	~		

3. Click on the Run Report button.

	□ Show Inactive Employee
	Absentee Report
Select a range of time to view: 10/21/2013	to 10/25/2013
Select employee group [Manage]:	
🔍 All Visible Employees In Keeler Co.	•
Run Report	

Absentee Report

Prev Period		Period between	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	

• 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**.

Display	Options	
Select Date Range	Today	\$
	From: 10/21/2013 12:00:00 AM	_
	To: 10/22/2013 12:00:00 AM	
	In Employees' TZ	٥
Select Employee or Group	🔍 Keeler, Larry	\$
Select Report Column Preset [Detailed] [Summarized]	Automatic	\$
Show Advanced Options	Hide	٥
🔊 Reset 🛛 🔒 Save/Edi	Preset 🔲 View Report	

<	ŀ		ne Report 13 to 22 Oct 2013			\Rightarrow
	🔺 Employee	In Time and Location	Out Tin	ne And Location	Duration	
		10/21/2013 07:54:08 AM CDT	10/21/2013	04:54:10 PM CDT		
۰	Keeler, Larry	User Administration	User	Administration	09:00:02	Edit
		10/22/2013 07:54:48 AM CDT	10/22/2013	05:04:51 PM CDT		
۰	Keeler, Larry	User Administration User Administration	Edit			
		10/23/2013 07:55:19 AM CDT	10/23/2013	04:55:55 PM CDT		
۲	Keeler, Larry		User	User Administration	09:00:36	Edit
		10/24/2013 07:05:52 AM CDT	10/24/2013	10:06:00 AM CDT		
۰	Keeler, Larry	User Administration	User	Administration	03:00:08	Edit
		11/01/2013 08:05:12 AM CDT	11/01/2013	02:05:18 PM CDT		
۲	Keeler, Larry	User Administration	User	Administration	06:00:06	Edit
∇					10	
					Time Worked: 36 hrs	, 11 min
		Piecework	View/Use Benefits	Clock In/Out Now	Add Clock In/Ou	ıt Pair

	🔺 Employee	Туре	Date	Benefit Usage Time	Reason/Note for use of Benefit Hours	
۲	Keeler, Larry	Sick	Oct 24, 2013 8:00:00 AM	05:00:00		\$
\bigtriangledown						100

• 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.

<	2				Report to 25 Oct				\Rightarrow
	🔺 Employee	In Ti	me and Location			OutTim	ne And Location	Duration	
_		10/24/201	8 07:05:52 AM C	DT	10)/24/2013	10:06:00 AM CDT		
🖶 Keeler, Larry	Usei	Administration			User A	Administration	03:00:08	Edit	
\bigtriangledown								10	0 0
								Time Worke	d: 3 hrs
			Piece	work	/iew/Use	Benefits	Clock In/Out Now	Add Clock In/Ou	t Pair
				Bene	iit Usage				
	🔺 Employee	Туре	Date		Time		Reason/Note for use of E	Senefit Hours	
۲	Keeler, Larry	Sick	Oct 24, 2013 8:00:00 AM	05	: 00: 00				×
\bigtriangledown								10	0 0
								Renefit Time Use	d 5 br

Attendance Hours Report

The TimeIPS Attendance Hours Report provides a way to see employee attendance of hours compared to scheduled time.

1

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

Report Name	Special Reports Description		
	Clocking		
Audit Report	Shows all edits and automated changes to time events for a selected span of time		
Employee Summary Repor	t 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: Attendance Hours

Employee Attend	ance Hours Report		
Starting Time: 10/21/2013	Ending Time:		
Select an employee's presets for this page:	Oct F S M T F S 1 2 3 4 5 6 7 8 9 10 11 12		
Save Preset Delete Preset	13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31		
Select employee group [Manage]: All Visible Employees In Keeler Co. \$			
Summarize by:			
Name Ignore Usage Count as time worked	Omit day used Count as full day (100%)		
Sick 🔿 💿	0 0		
Vacation O O	0 0		
Run Report			

• 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

		Hours Work	ed / Scheduled I	lours		
🔺 Name	10/14/13	10/15/13	10/16/13	10/17/13	10/18/13	Total
Backup, Joey						
Boresow, Patty	00:00 / 08:00	00:00 / 08:00	00:00 / 08:00	00:00 / 08:00	00:00 / 08:00	00:00 / 40:0
Keeler, Larry	09:00 / 08:00	09:00 / 08:00	08:00 / 08:00	00:00 / 08:00	00:00 / 08:00	26:00/40:00
eeler, Matthew M.	09:00 / 08:00	09:00 / 08:00	09:00 / 08:00	00:00 / 08:00	00:00 / 08:00	27:00 / 40:00
Lierz, Ken						
Lierz, Whitney						
Tatro, Betty	09:00 / 08:00	09:00 / 08:00	09:00 / 08:00	00:00 / 08:00	00:00 / 08:00	27:00 / 40:00
Wolf, Hannah						
Wolf, Jad						
						100
						100

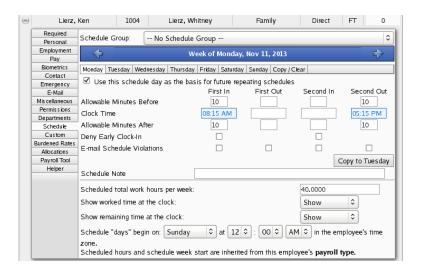
The hours and minutes worked within the scheduled time will be displayed.

• 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.

		Hours Work	ed / Scheduled I	Hours		
🔺 Name	10/21/13	10/22/13	10/23/13	10/24/13	10/25/13	Total
Backup, Joey	07:20 / 09:00	15:35 / 09:00	08:18 / 09:00	00:00 / 09:00	08:49 / 09:00	40:03 / 45:00
Boresow, Patty	09:00 / 08:00	08:42 / 08:00	08:37 / 08:00	08:38 / 08:00	03:00 / 08:00	37:58 / 40:00
Keeler, Larry	08:54 / 08:00	09:00 / 08:00	08:56 / 08:00	07:06 / 08:00	00:00 / 08:00	33:56 / 40:00
Keeler, Matthew M.	07:57 / 08:00	07:57 / 08:00	07:57 / 08:00	07:57 / 08:00	07:57 / 08:00	39:47 / 40:00
Lierz, Ken	09:00 / 09:00	08:00 / 09:00	00:00 / 09:00	07:50 / 09:00	08:50 / 09:00	33:40 / 45:00
Lierz, Whitney	08:00 / 09:00	00:00 / 09:00	07:59 / 09:00	00:00 / 09:00	00:00 / 09:00	15:59 / 45:00
Tatro, Betty	07:47 / 08:00	08:17 / 08:00	08:32 / 08:00	08:39 / 08:00	08:43 / 08:00	41:58 / 40:00
Wolf, Hannah	02:40 / 03:00	01:42 / 03:00	01:48 / 03:00	01:12 / 03:00	02:18 / 03:00	09:40 / 15:00
Wolf, Jad	00:00 / 09:00	00:00 / 09:00	00:00 / 09:00	00:00 / 09:00	00:00 / 09:00	00:00 / 45:00
∇						100 🗘

Attendance Percentage Report

The Attendance Percentage Report provides a quick way to see time employees have worked vs the time they were scheduled.

Report Name	Special Reports Description
	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Repor	t 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 settin 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.
\bigtriangledown	

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

Employee Attendan	ce Percentage Report
Starting Time:	Ending Time:
10/21/2013	10/25/2013
Select an employee's presets for this page:	♀ 2013 ♀
Keeler, Matthew M.	S M T W T F S 1 2 3 4 5
No Preset Selected 🗘	6 7 8 9 10 11 12
Save Preset Delete Preset	13 14 15 16 17 18 19 20 21 22 23 24 25 26
	27 28 29 30 31
Select employee group [Manage]:	
All Visible Employees In Keeler Co.	
Summarize by:	
Day 🗘	
Name Ignore Usage Count as time worked	Omit day used Count as full day (100%)
Sick O	0 0
Vacation O O	0 0
Run Report	

• 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

			ercentage Repo			
🔺 Name	10/21/13	10/22/13	10/23/13	10/24/13	10/25/13	Total%
Backup, Joey	81.5%	173.2%	92.2%	0%	98%	89%
Boresow, Patty	112.5%	108.8%	107.8%	108%	37.5%	94.9%
Keeler, Larry	111.3%	112.5%	111.6%	88.8%	0%	84.8%
Keeler, Matthew M.	99.5%	99.5%	99.5%	99.5%	99.5%	99.5%
Lierz, Ken	100%	88.9%	0%	87.1%	98.2%	74.8%
Lierz, Whitney	88.9%	0%	88.7%	0%	0%	35.5%
Tatro, Betty	97.3%	103.5%	106.6%	108.2%	109%	104.9%
Wolf, Hannah	88.9%	56.6%	60.1%	39.9%	76.8%	64.5%
Wolf, Jad	0%	0%	0%	0%	0%	0%
						100

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

Lierz	Ken 100	4 Lierz,	Whitney	Family	Direct	FT 0
Required	Schedule Group:	No Schedu	le Group			0
Personal Employment			· ·			
Pav			Week of Monday	Nov 11, 2013		
Biometrics	Monday Tuesday	Wednesday Thurs	day Friday Saturday	Sunday Conv / C	Tlear	
Contact						
Emergency	Use this sche	dule day as the	basis for future rep			
E-Mail			First In	First Out	Second In	Second Out
Mis cellaneous	Allowable Minutes	Before	10			10
Permis sions	Clock Time		08:15 AM			05:15 PM
Departments Schedule	Allowable Minutes	After	10			10
Custom	Deny Early Clock-	In				
Burdened Rates	E-mail Schedule V					
Allocations	E-mail Schedule V	lolations				
Payroll Tool					C	Copy to Tuesday
Helper	Schedule Note					
	Scheduled total w	ork hours per we	ek:		40.0000	
	Show worked time	at the clock:			Show	0
	Show remaining ti	me at the clock:			Show	•
	Schedule "days" b	egin on: Sunda	y 🗘 at 12	≎ : 00 ≎ A	M 🗘 in the em	iployee's time
	zone. Scheduled hours a	and schedule we	ek start are inherite	d from this emp	loyee's payroll 1	type.

Break Violation Report

The Break Violation Report allows quick identification of employees without a sufficient break in a selectable period of time.

	Special Reports
🔺 Report Name	Description
Audit Report	Clocking Shows all edits and automated changes to time events for a selected span of time
1	5
	t 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.
\bigtriangledown	

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

S	elect		
During this time	Custom Range		٥
	From	10/21/2013 12:00:00 AM	
	To:	10/25/2013 12:00:00 AM	
Who have worked during Find and list employees who have worked during a period of ho	urs	6:00:00	
Without a break of That have not taken a break of at least this length		00: 30: 00	
S	ıbmit		

- 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		٥
	Fro	m: 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 Boressow, Patty starting 08:21 AM 10/24/2013 Keeler, Matthew M. Starting 09:02 AM 10/24/2013 Lierz, Ken starting 09:01 AM 10/24/2013 Lierz, Whitney starting 09:01 AM 10/24/2013 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

Report Name	Special Reports
	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Repor	t 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: Schedules Per-Hour

a												Dis	play	Opti	ons										
a												Se	arch	Opti	ons										
\$								S	ched	ule f	or th	e we	ek oʻ	Mor	ıday	, Nov	, 11,	2013							\$
										D	ate :	Mon	day,	Nov	11, 2	2013									
Employee Name	1 AM	2 AM	3 AM	4 AM	5 AM	6 AM	7 AM	8 AM	9 AM	10 AM	11 AM		1 PM	2 PM	3 PM	4 PM	5 PM	6 PM	7 PM	8 PM	9 PM	10 PM	12 AM	Hours Scheduled	Note
Keeler, Matthew								х	х	х	х		х	х	х	x	х							8hrs	
Lierz, Whitney								х	х	х	х	х	х	х	х	х	х							9 hrs	
Tatro, Betty								х	х	х	х		х	х	х	х	х							8hrs	
Keeler, Larry								х	х	х	х		х	х	х	х	х							8hrs	
Lierz, Ken								х	х	х	х	х	х	х	х	х	х							9 hrs	
Boresow, Patty								х	х	х	х		х	х	х	х	х							8hrs	
Wolf, Jad								х	х	х	х	х	х	х	х	х	х							9 hrs	
Wolf, Hannah									х	х	х	x												3 hrs	
Backup, Joey								х	x	x	x	x	х	х	х	x	x							9 hrs	

By default, the current week's schedule is displayed.
 O To view the PREVIOUS WEEK's schedule, click the blue arrow in the top left corner.
 O To view the NEXT WEEK's schedule, click the blue arrow in the top right corner.

Display Options

	Display Options	
	Available Columns	Displayed Columns
Select an employee's presets for this page. Keeler, Matthew M. 0 No Preset Selected 0		4 AM 5 AM 6 AM 7 AM 8 AM 9 AM 10 AM Up Down
Save Preset Delete Preset	Group Results By Show Unscheduled Employees? Show Inactive Employees	Date C
	Display	

Optionally, Select an employee's presets for this page.
 O Select the employee from the drop down list.
 O 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.

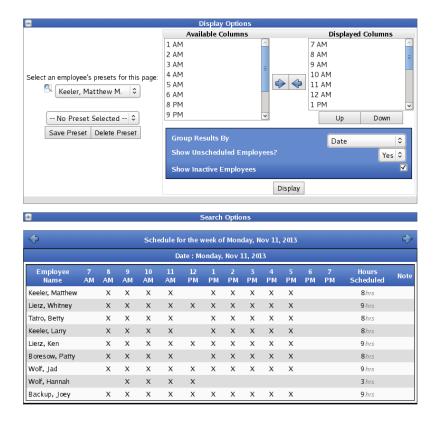
TIP: You can select multiple items to move by holding down the CTRL key while clicking on the individual fields. All the selected fields will be highlighted. You can select multiple consecutive items by holding down the SHIFT key while clicking on the first and last item in the sequence.

• 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.



Search Options

=			Search Options
			alue in one or more of the following fields and press Search. plank will not be used in filtering the list.
Full	Name:	Lierz*	ID/Badge: 1001
	Note:		
			Search Reset Filter

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.

	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 Repor	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.
\bigtriangledown	

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.

		Мо	nday, 21 Oct	ober 2013				
Employee Name	First In Early	First In Late	First Out Early	First Out Late	Second In Early	Second In Late	Second Out Early	Second Out Late
Backup, Joey		0 hrs, 5 min	1 hr, 35 min					
Boresow, Patty	0 hrs, 19 min			5 hrs, 21 min		Al	bsent	
Keeler, Larry	0 hrs, 6 min			4hrs, 54min		Al	bsent	
Keeler, Matthew M.		1hr, 3min		5 hrs, 34 min		Al	bsent	
Lierz, Ken		Abs	ent					
Lierz, Whitney		1hr						
Tatro, Betty		1hr, 13min		5 hrs, 43 min		Al	bsent	
Wolf, Hannah		0 hrs, 18 min						
Wolf, Jad		Abs	ent					

• Click the **Export** button to export and view the report in a spreadsheet program such as OpenOffice.

	Α	В	С	D	E	F	
1		Schedule \ 10/21/2013	Violations for A 3 12:00:00 AM 1	ll Employees In to 10/22/2013 12	Keeler Co. 2:00:00 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, Lad	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

A Report Name	Special Reports
	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.
\bigtriangledown	

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

	Tardy Report
Select a range of time to view: 11/05/2013	to 11/12/2013
Enter the tardy time of day: 8 0 : 00 C AM C (Employees clocking in after this time are tardy)
Enter the start time of day: $12 \diamond$: $00 \diamond$ $AM \diamond$ (f	Normally midnight for day shift, and noon for night shift)
Select employee group [Manage]: Image: Select employees in Keeler Co. Image: Select employees in Keeler Employees in Keeler Co. Image: Select employees in Keeler Co. Image: Select employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Employees in Keeler Em	

• 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 <u>Manage link</u> 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

\triangleleft Back Period between Oct, 21 2013 and Oct, 22 2013 Next Period Prev Period Na Monday 10/21/2013 Tuesday 10/22/2013 Total Backup, Joey On Time 1 Boresow, Patty On Time On Time 0 Keeler, Larry On Time On Time 0 Keeler, Matthew M. Tardy 2 Tardy Lierz, Ken Vacation Vacation 0 Lierz, Whitney Absent 1 Tardy Tatro, Betty Tardy 2 Wolf, Hannal 2 Tardy 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

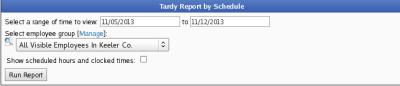
Tardy Report by Schedule

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.

	Special Reports
🔺 Report Name	Description
Audit Report	Clocking Shows all edits and automated changes to time events for a selected span of time
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
	t 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
Defeult Joh Denert	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.
\bigtriangledown	

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 O	ct, 23 2013	Next Period
Name	Monday 10/21/2013	Tuesd	ay 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

Report Name	Special Reports
	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Repor	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.
\bigtriangledown	

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

	Approvals Report	
Select a Report Range:	Custom Range :	2
	From 10/14/2013 12:00:00 AM To 10/18/2013 12:00:00 AM	
Apply Date Filter To:	Date of Event 3	\$
Show approvals	Approvals made by the selected employees	•
Selected Employees	🔍 All Visible Employees In Keeler Co. 🛛 🗄	0
Show for	Approvals	^
	Unapprovals	
	Forced Approvals	¥.
Submit		

- 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 v bis selector to quickly access the most commonly used time ranges.
 v 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.

			Approv	als		
Approval	Employee	🔺 In Time	Out Time	Duration	Approved At	Performed By
X Unapproved	Tatro, Betty	09/03/2013 12:05 PM	10/17/2013 05:45 AM	1049 hrs, 40 min	11/01/2013 04:55 PM	Keeler, Matthew M.
\bigtriangledown						100 \$

Approvals Report

Showing for Approvals

			Approv	/als		
Approval	Employee	🔺 In Time	Out Time	Duration	Approved At	Performed By
🗹 Approved	Keeler, Larry	09/03/2013 12:05 PM	10/16/2013 04:00 PM	1035 hrs, 55 min	10/17/2013 11:09 AM	Keeler, Larry
🗹 Approved	Wolf, Jad	09/03/2013 12:05 PM	10/17/2013 05:02 AM	1048 hrs, 57 min	10/17/2013 09:46 AM	Keeler, Matthew M.
\bigtriangledown						100 \$

• 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 <u>e-mail tab of Employee Administration</u>.

	Special Reports
Report Name	Description Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
	t 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.
\bigtriangledown	

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

	End Of Week Mailer
Re-send reports for week containing: October	<u>-</u> 25 <u>-</u> 2013 ≎
Select employee group [Manage]:	
All Visible Employees In Keeler Co.	•
Run Report	

- 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 Tarco, Betty 1 emails have been queued. Sending report for Keeler, Larry 1 emails have been queued. Sending report for Uerz, Ken 1 emails have been queued. Sending report for Wolf, Jad 1 emails have been queued. Sending report for Wolf, Jad 1 emails have been queued. Sending report for Wolf, Jad 1 emails have been queued. Sending report for Wolf, Jad 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).

					Emple	oyees						
	🔺 Full f	Name I	ID/Badge	Ma	nager		Orga	nizational	Unit	Payroll Type	Status	bike transit
	Boresow,	v, Patty 1005		Patty 1005 Lierz, Whitney			Family			Direct	FT	1
	Required	E-Mail Settings	Direct Mail	End-of-Week	Doport C	ottinar	Schodulo	Tomplato	r			
1	Personal	E-Mail Settings	Direct Mail	LIIG-OF-WEEK								
	Employment							uration.				
	Pay			Should thi	s emplo	yee rea	ceive E-	mail mes	ssages,	Internal me	ssages, o	or both?
	Biometrics								В	oth		0
	Contact						_					
	Emergency	E-mail Address		Default	HTML	Each		End of	Overtim	e Schedule [:]	Schedule	
	E-Mail			E-mail		Clock	Errors				Alert	Note
	Mis cellaneous	patty@keele	rco.com	۲	\checkmark			\checkmark				
	Permis sions			0	\checkmark							
	Departments				V	_	-	_	_			
	Schedule			0	V							
	Custom	No E-mail / F	Private	0								
	Burdened Rates	E-mail:		0								
H	Allocations											
	Payroll Tool	Overtime Lin	nit:	Overtime	Alert Int	erval:	Over	time Ter	nplate:			Show
	Helper	15 minutes	•	5 minute	s 🗘			e default		ate 🗘	Erro	_

• 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	Time In				Job	Time Worked	
Mon, Oct 21st	07:41am (CDT Mon	, Oct 21st 05:21	om CDT	paint	9hrs, 40min	
Tue, Oct 22nd	07:15am (CDT Tue,	Oct 22nd 04:42	om CDT		9hrs, 27min	
Wed, Oct 23rd	08:22am	CDT Wed	, Oct 23rd 05:03	pm CDT		8hrs, 41min	
Thu, Oct 24th)8:21am (CDT Thu	, Oct 24th 05:31	m CDT		9hrs, 10min	
			1	Neekly T	otal:	36hrs, 58min	
			Benefits				
Date		Туре		lotes		Hours Used	
10/25/2013 08:00 AM GMT CDT	Sick					3hrs	
			Benefits	Total:	3hrs		
Benefit and Work Time Total: 39hrs, 5							
		B€	enefit and wo	ik inne	rotar.	55113,561111	
			enefit and wo leek Benefit S		rotar.	55113,561111	
Benefit Type	Tota					Available	
Benefit Type Sick		End-of-W	/eek Benefit S	status	ost		
	219	End-of-W al Earned	/eek Benefit S Total Used	status Total L	ost	Available	
Sick	219	End-of-W al Earned hrs, 23min	/eek Benefit S Total Used 3hrs	Status Total L Ohrs	ost	Available 216hrs, 23min	
Sick	219 193	End-of-W al Earned hrs, 23min hrs, 50min	/eek Benefit S Total Used 3hrs	Total L Ohrs Ohrs	ost	Available 216hrs, 23min	
Sick	219 193	End-of-W al Earned hrs, 23min hrs, 50min	/eek Benefit S Total Used 3hrs Ohrs ked This Wo	Total L Ohrs Ohrs	ost	Available 216hrs, 23min	
Sick Vacation	219 193	End-of-W al Earned hrs, 23min hrs, 50min Hours Wor Overtime	/eek Benefit S Total Used 3hrs Ohrs ked This Wo	tatus Total L Ohrs Ohrs	ost	Available 216hrs, 23min 193hrs, 50min	

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.

	Special Reports
A Report Name	Description
Audit Desert	Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
	t 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.
\bigtriangledown	

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

		Select an employee's presets for this page
		S Keeler, Matthew M. 🗢
		No Preset Selected 🗘
		Save Preset Delete Preset
		Sign Off Report
Select Date Range	e	Custom Range
		From: 10/21/2013 12:00:00 AM
		To: 10/26/2013 12:00:00 AM
		In Employees' TZ 🗘
Select Employee	or Group	🔍 All Visible Employees In Keeler Co. 🔷
Append Note	Please sign and i	etum by Friday Nov 1st. .:iii
Output format:	PDF (Landscape)	Show columns: Overtime only
Lines Per Page (Text - Paged only)	66	☑ Show benefit usage and holidays
Show breaks:	All 🗘 Earliest 🗘	□ Show unpaid benefit usage and holidays
Sort reports by:	Organizational Unit 🗘	☑ Show job changes as breaks
Show hours as:	Hours (decimal) 🗘	earrow Show job/benefit details (identify jobs for clocks, show summary)
🗆 Add date line t	o signature	□ Hide work day ranges (not recommended)
🗆 Total individual	workweeks (PDF only)	□ Hide days with no events
□ Show future sc	heduled time	Ignore the no default overtime policy warning
		□ Hide events with no duration
		Run 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.

	ct 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.
	ct 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 ps page.
• (Opt	ional) Enter any custom text you wish to display below each employee's time in the Append note field.
	t 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)
First C C C Ther C	ise how to Show breaks . choose how many breaks to show: None 1 2 4 All choose what kind: Earliest Longest
с	ise to Sort reports by either: Employee Organizational Unit
c c	ise to Show hours as one of the following formats: Hours (decimal) HH:MM HH:MM:SS
Chec	k the Add date line to signature box to include the date.
Chec	k the Total individual workweeks box to display the total for each work week.
Chec	k the Show future scheduled time box to have the future scheduled time show as worked time.
NOT	E: The selected Date Range must include a future date.
c	t which Overtime, Doubletime , or Premium Time columns to show. The options provided are: Overtime only Overtime and Doubletime OT, DT, and Premium Time
Chec	k the Show benefit usage and holidays box to include them in the report.
Chec	k the Show unpaid benefit usage and holidays box to include them in the report.
Chec	k the Show job changes as breaks to include job changes.

• 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: O Output format: PDF (Landscape) O Show breaks: All / Earliest O Soft reports by: Organizational Unit O Show hours as: Hours (decimal) O Show columns: Overtime only O Show benefit usage and holidays O Show job changes as breaks O Show job/benefit details (identify jobs for clocks, show summary)

Day Start - Day End Cloc 10/21/13 - 10/22/13 10/22/13 12:00 AM 7:41 10/22/13 - 10/23/13 10/22 12:00 AM 7:41 10/22/13 - 10/23/13 10/22 12:00 AM 7:15 10/23/13 - 10/24/13 10/22 12:00 AM 12:00 AM 8:22 10/24/13 - 10/25/13 10/22 10/24/13 - 10/25/13 10/22 10/24/13 - 10/25/13 10/22 10/24/13 - 10/25/13 10/22 10/24/13 - 10/25/13 10/22 10/24/13 - 10/25/13 10/22 10/24/13 - 10/25/13 10/24 12:00 AM 8:21	//3 AM 3 Z/3 AM AM AM AM	Clock Out 10/21/13 5:21 PM 10/22/13 4:42 PM 10/23/13 5:03 PM		Std 0.00 9.45 8.68	Over 0.00 0.00 0.00	0.00
12:00 AM 7:41 32 7:072713 10/23/13 10/22/13 10/23/13 10/22 12:00 AM 12:00 AM 7:15 10/23/13 10/24/13 10/22 12:00 AM 12:00 AM 8:22 10/24/13 10/25/13 10/25	AM 3 //13 AM //13 AM	5:21 PM 10/22/13 4:42 PM 10/23/13		9.45	0.00	
12:00 AM 12:00 AM 7:15 10/23/13 - 10/24/13 12:00 AM 12:00 AM 8:22 10/24/13 - 10/25/13 10/24	AM 8/13 AM	4:42 PM 10/23/13				0.00
12:00 AM 12:00 AM 8:22 10/24/13 - 10/25/13 10/24	ÂM			8.68	0.00	0.00
	14.0			1		
		10/24/13 5:31 PM		9.17	0.00	0.00
10/25/13 - 10/26/13 10/25 12:00 AM 12:00 AM 8:00 Sic	AM	10/25/13 11:00 AM		0.00	0.00	3.00
Employee Signature:	Approved by:			27.30	0.00 Total:	12.67 39.97
WorkOrd	ler	Iob	Code	Std	Ovr	7
remodel	paint	33		0.00	0.00	1

Please sign and return by Friday Nov 1st.

NOTES:

 O lob 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: F Boresow, Patty	=amily					9:17 AM CST Emp#: 1005
Day Start - Day End		OUT			BEN	
10/21/13 - 10/22/13 12:00 AM 12:00 AM		10/21/13		0.00		
10/22/13 - 10/23/13 12:00 AM 12:00 AM	10/22/13		9.45	0.00	0.00	
10/23/13 - 10/24/13 12:00 AM 12:00 AM	10/23/13 8:22 AM		8.68	0.00	0.00	
10/24/13 - 10/25/13 12:00 AM 12:00 AM			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		0.00	0.00	3.00	
			27.30	0.00 Total:		
Job Code	REG	OT		iotat:	39.97	
paint 33	0.0	0 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.

	Special Reports
A Report Name	Description Clocking
Audit Report	Shows all edits and automated changes to time events for a selected span of time
Employee Summary Repor	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: Worked Months

Select date containing the year to view: November 0 13 0 2013 0 Select employee group [Manage]:
All Visible Employees In Keeler Co. \$ Run Report

• 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 <u>Manage link</u> 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	ŀ	lours W	/orked∣	Betwee	n Jan, 1	2013 a	nd Dec	, 31 201	B CST			Nex	t Year
Name	Jan	Feb	Mar	Apr	Мау	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

🧓 Automatic	Reports			
•		Add New Repo	rt	
	Report	Owner	Preset	Next Run
		No Results Found		
\bigtriangledown				100 🗢

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.

O 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 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 tither 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

🔺 Nar	ne Report	Owner		Preset	Next Run
-	Sign Off Re	port Keeler, Matthew	M. Automatic	Sign Off Report 07/24	/2014 12:00 AM
	Report Pa	arameters		Run Scheduling	24
Nam	ie:		Next Run:	07/24/2014 12:00 AM	
Sele Repo	Sign Off Report		Run Interval:	Weekly 🔽 Every 1 week(s)	
Run Repo As:	Keeler, Matthew	v M. [🕶		Every 1 week(s)	
Sele Pres		atic Sign Off Report			
Repo Star		nutes before run urs before run		Delivery Options	
Repo End:	ort O Date: O mir O hou O day	ys before run urtes before run ys before run	Filename Template: Add E-mail	Add External Resource A	dd FTP
	Kun Kej	port Now		S Revert Row	Save Row

• 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.

 - ename Template: Enter a template for the filename to be generated.

 %Wfor the year

 %m for the month

 %d for the hour

 %d for the hour

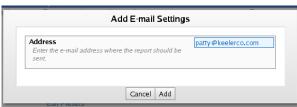
 %M for the second

 %s for the AM/PM

 %s for the unix timestamp (seconds since 12am, Jan 1, 1970 in GMT)

 Additional options can be used, per <u>PHP strftime function</u>.

Click the Add E-mail button.
 Enter the e-mail address where the report should be sent, then click the Add button to save.



0	Click	the	Add	FTP	button.

- ick 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.

Add FTP Setting	212.227.90.117
Enter the IP address or domain name of the FTP server.	212.227.90.117
FTP Username Enter the username needed to log into the FTP server.	keelerco
FTP Password Enter the password needed to log into the FTP server.	admin
FTP Path Enter the path (absolute or relative) that the file should be uploaded into on the FTP serv default path.	
Cancel Add	

	🔺 Name	Report	Owner		Preset	Next	Run
•		Sign Off Report	Keeler, Matthew M.		atic Sign Off Report	07/24/2014	
	Weekly Sign (Off Sign Off Report	Keeler, Matthew M.	Autom	atic Sign Off Report	07/24/2014	12:00 AM
		Report Parameters			Run Scheduling		ж
	Name:	Weekly Sign Off	Next Ru	ın:	07/24/2014 12:00 AM		
	Select Report:	Sign Off Report	Run Inte	erval:	Weekly Every 1 week	(5)	
	As:	Keeler, Matthew M.	" D [=]		Delivery Options	(5)	
	Preset:	Filenam	e				
		Report O Date:		te:			
	Start:	O minutes befo	vre run	Add E-mail	Add External Resource	Add FTP	
		O hours before run		: Address:	patty@keelerco.com		×
		● 10 days before	run FTP: S	Server:	212.227.90.117		×
	Report	O Date:		Jsername:	keelerco		
	End: O minutes before run		ore run F	Password:	admin		
		O hours before		Jpload			1
		• 3 days before	run ⁱ	Path:			
		Run Report Now					
					Sever	t Row 🔒 S	Save Row

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 <u>Schedules</u> optional module is required.

Using the left pane Main Menu » Administration, click on: Clocking » Group Clock

Roup Clock	
🥶 Grou	p Clock
Select no employees.	•
Clocked Out	Clocked In
Backup, Joey (Family) Boresow, Patty (Family) Keeler, Larry (Family) Keeler, Matthew M. (Administration) Lierz, Ken (Family) Lierz, Whitney (Administration) Tatro, Betty (Family) Wolf, Hannah (Friends) Wolf, Jad (Friends)	
Clock In -> Clock In or C	Change Job <- Clock Out
11/14/2013 01	:59:40 PM
Department: Default Department 🗘 Work Order	: No Work Order 🗘 Job: No Job 🗘
Clock Note:	Audit Note:
Flag as Cloc	k Error
Use Tracki	ng Fields

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.

Tracking Fields						
Name	Value	Accepts	Required For	Optional For		
Supplies Consumed	None Selected ≎		[Clock Out][Change Job]			
Transportation Method	work bike (2)		[Change Job]	[Clock In]		

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.

Jsing the left pane Main Menu » Administ and then click on the Import Time icon Import Time	tration, click on: Clocking » Batch Time Entry
Batch Time Import	
Batch Tir	me Import
Time Import File:	Browse No file selected. Import Generate Template
fill in your time data. • The "Employee" column will look for employees based	adsheet program such as Excel™ or OpenOffice.org Calc and on name first but will also look based on badge number if the mployee column with badge numbers to identify employees. e Number" for ease of use.

• 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.

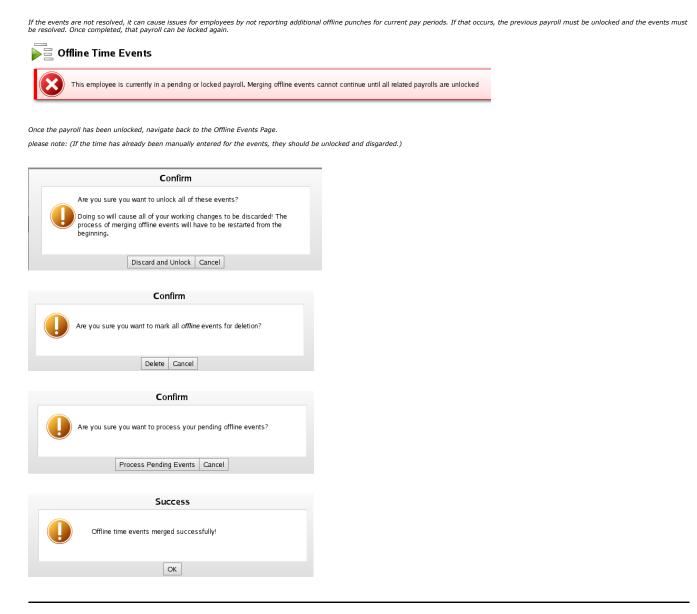
Offline Events

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.

Offline Time Events				
You currently have all time events locked for this employee. You must either accept all chan	ges or explicitly unlock these events to allow o	thers to be able to add or edit time.		
Offline Time Events: When a TreeFSB clock is unable to reach the TreeFSB Server, either due to retrook fable safely daved back without human intervention, they will be. However, there are occass tors when namaal intervention is events with any existing time.	e or other problems, the clock will duffully record any pu equired. Those pending events will be viewable here, alo	unches to its local hand drive. Once connectivity has been restored, these seg with options to discard, modify, or create additional events. Once the	offine time events will be replayed to the server. Prov events have been reviewed, processing can begin whi	ided these events can be ch will merge the offline
Locial Time Events: Once pending offlike punches are being verwed, various other pages within TimeP980will be ponches as quickly at possible, or to be sure to induct the events before rangianity away from the page.	e locked to ensure a safe and successful merge. These	pages include Time,Edit Report, Payrol, Batch Time Entry, and Group Cl	lock. Therefore, it is in your best interest to either resol	ve and merge the offline
	Pending Offline Event	Selection		
Employee Selection				Abrams, Patricia
Select the employee for whom you wish to merge offline events.				
	View			
▲ In	Pending Offline Eve In Actions	ents Out	Out Actions	Duration
11/29/2012 09:21:36 AM CST (offline)	2 🗙	11/29/2012 09:22:48 AM CST	Z ×	00:01:12
∇				100 0
		Save Changes Disc	ard Changes and Unlock Mark All Offline fo	or Deletion Add New Time
A Tinisting	Pending Deleted Ev	rents	Restore	
 Interrup 	There are currently no deleted ev	vents to restore.	1011574	
∇				100 0



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

Г	racking Fields			
		Add New Tracking Field		
			Show Inactive Tr	acking Fields 🗆
	🔺 Name	Tracking Fields Format	Required	Optional
	Supplies Consumed	Select From List	Out, Change Job Out	
	Transportation Method	Select From List	Change Job In	In
\bigtriangledown				100 🗘

	Add New Tracking Field	
ew Field Name		Supplies Consumed
	Create	
1. Click the + (plus) sign to	the left of the Add New Tracking Field bar.	
. , ,	the left of the Add New Tracking Field bar. e the name for a new tracking field.	

Setup and Edit

• Click the + (plus) sign to the left of the Tracking Field Name.

			Add New Tracking Field											
				Show Inactive Tracking Fields 🗆										
		🔺 Name	Tracking Fields Format	Required Optional										
			Numeric	In, Out, Change Job										
		Field Settings Tracking Against Field Options												
		Field Name		Supplies Consumed										
			Field code											
		Input Format		Numeric										
Field Settings tab		Minimum Value												
												Maximum Value		
		Field Active Status		Active										
		Delete Field		Delete Field Supplies Consumed										
				🔊 Revert Row 🛛 🔚 Save Row										
	٠	Transportation Method	Select From List	Change Job In In										
	\bigtriangledown			100 🗘										

- 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.

Confirm Deletion

Are you sure you want to delete this tracking field? This is an **irreversible** operation.

Delete Cancel

			Tracking Fields			
		🔺 Name	Format	F	Required	Optional
		Supplies Consumed	Select From List	Out, Ch	ange Job Out	
		Transportation Method	Select From List	Chai	nge Job In	In
	Fie	eld Settings Tracking Against Field Options				
	Т	Track Work Time: Require On In				Optional 🗘
	п	Track Work Time: Require On Out				Hidden 🗘
Tracking Against tab	Т	Track Work Time: Job Change - Old Job Out				Hidden 🗘
	Т	Track Work Time: Job Change - New Job In			Required	d 🔍
	Т	Track Against Benefits				Track Benefits
	Т	rack Against Holidays				Track Holidays
	п	rack Against Piecework			П Т	rack Piecework
				6	Revert Row	🔒 Save Row

- 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.

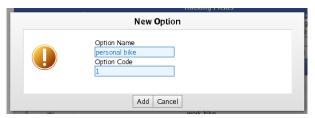
• If this tracking field should be associated with Benefit usages, Holiday events, or Piecework events, then check the correlating box.

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

		🔺 Name		Tracking Fields Format		Required	Optional
۰	Supplies consulted			Select From List		Change Job Out	
	Tra	ansportation Me	thod	Select From List	C	hange Job In	In
	Field Settings	Tracking Against					
				Show Inactiv	e Options 🛛	Add New Transportation	n Method
			Op	tions for Field Transportatio	n Method		
		1		Name		▲ Code	
				personal bike		1	
- 1	(H)			work bike		2	
				walk/skate/board		3	
- 1				public trans		4	
				automobile		5	
	\bigtriangledown						100 🗘

• 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.

	Options for Field Transportatio	🔺 Code
	personal bike	1
Option Sett	-	
Transpo	rtation Method Name	personal bike
Transpo	rtation Method Code	1
Transpo	rtation Method Pay Code	
Active		Active
		🥱 Revert Row 🛛 🔓 Save R
۲	work bike	2
+	walk/skate/board	3
+	public trans automobile	4
•	automobile	10

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

😑	Creat	te a new ID/Badge Function		
Field				All 🗘
Original			101	
Replacement			Tem	p++111*101
Note			Cloc	ks Temp employee 1
				Add Mapping
🔺 Field	Original	Replacement	Note	Actions
		No Results Found		
∇				100 \$

- 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 $\ensuremath{\textbf{FIeld}}$ 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.
- O 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 0

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".

Time In:		Time Out:				
Paid: 11/15/2013 05:54:3	9 PM CST	Paid: 11/15/2013 08:54:46 PM CST				
Real: 11/15/2013 05:54:3	9 PM CST	Real: 11/15/2013 08:54:46 PM CST				
Location: Administration Select Location T		Location: Administration Section Select Location Type 🗘				
Insert Before Delete	Insert After	Insert Before Delete Insert After				
Department:	No Department	•				
Work Order:	None 🗘					
Current Job Completion:	%					
Job:	sheet rock (44) 🗘					
Clock Note (In): Entered when clocking in by the employee. For example: jobnote++jobnum*badgenum						
Clock Note (Out): Entered when clocking out.	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



■ ID/Badge Functions

Back

ID/Badge Mapping Export								
Export:	Export Data							
ID/Badge Mappi	ng Import/Update							
ID/Badge Mapping Import/Update File:	Browse No file selected.							
ID/Badge Mapping Import/Update:	Import/Update							
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.								

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 <u>OpenOffice.org</u> 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.

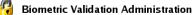
Import Instructions

- 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



	Global Biometric Settings		
Choose System-Default Biometrics Thres	hold:	Normal Authentication	٢
Upon authentication failure when required	t:	Deny Clock	٢
Allowable identification attempts		2	0
Enrollment Biometrics Capture Method:		Quick	0
Number of Captured Templates on Enrolli	ment:	4	٥
Number of Templates for Progressive Enr	ollment	4	٢
Relay Triggers Require Biometric Authent	ication	Yes	\$
Biometric Read Timeout		1	.0
	Update Global Biometrics Settings		

- 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.)

 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.
 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 nrollment

 - enrollment.
 enrollment.
 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 templates for Progressive Enrollment: Number of additional templates 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
 - h. Enter the number of seconds the system will wait to receive a valid read for one 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 nar
 b. Click on the **Biometrics** tab.
- O. 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

🔺 Ful	I Name II	D/Badge	Employee Manager	S Organiza	ational Unit	Payroll Type	Status	bike transit
Boresov		1005	Lierz, Whitney	-	mily	Direct	FT	1
Required Personal Employment Pay Biometrics Contact Emergency E-Mail Mis cellaneous Permis sions Departments Schedule Custom Burdened Rates Allocations Helper	 "System page. 'No Auth time. 'Always. option to 'Accept. use of bit. 'Normal. 'High Au 'Very Hig 'Maximu Higher security precise biometri clock attempt. matches, but m. 'Normal Autheni 	Default" to u entication Re Accept" to al simulate the Any Biometric metrics for Authentication th Security A m Security A m Security A m Security A levels require c placement. ut are less il ay allow an in tication" is re	ometrics Security L se the global system equired" if employee v low employee to cloc use of biometrics for "to accept any bion mployees who have n" to allow validation wi uthentication" for hig uthentication" for hig a more exact biome These levels are more kely to allow an unau neorect person to be commended for typic cation" may be desire	threshold se von't be requili k even if noti employees v entric without difficulty auti with a norma h-security em allow validat trics match. Tree likely to fa thorized pers accepted in i al clocking u	red to provid hing is detect whose prints verification. I biometrics metrics materics ion with exco This may rec il to recognit ion . Lower se rare cases. se. "Very Hig	e biometrics a ted on the ser consistently f Use this option match. ch. ellent biometri quire multiple a ze an employe eccurity levels v gh Security Au	t clock-i asor. Usi ail to be on to sin cs mato attempts e, deny vill acce uthentica	n/out e this detected. nulate the hes. and ing the pt weaker ation" and
	Biometrics Security Level: Prints:	Always Ac 4 optic print		T	Action on Failure: Progressiv Templates:	e 3 optic	m Defai template Cle	
					5	Revert Row	a s	ave Row

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

- Set "Enrollment Fingerprint Capture Method" to Multi-read.
 Set "Number of Captured Fingerprint on Enrollment" to 2.
 Set "Number of Fingerprints for Progressive Enrollment" to 10.
- 4. When employees enroll, have them:
 - o present their right index finger straight on for the first capture,
 o 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).

- Set "Enrollment Fingerprint Capture Method" to Quick. Set "Number of Captured Fingerprint on Enrollment" to 5. When employees enroll, have them:
- 2. 3.
 - present their thumb/finger straight on for the first capture,

 - or construction of the second capture,
 to the right for the third capture,
 the top of the thumb/finger straight on 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 second
- 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, <u>TimeIPS does not store an image of the employee's fingerprint</u>. 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:

 - Placing the finger first against the sensor.
 Pressing the finger first gainst the sensor.
 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
- Make sure fingerprint settings are optimal.
 Set fingerprint matching attempts to at least 5
 - 2. Set match quality to normal
- Make sure enrollments are good.
 Clear the employee's prints and allow them to re-enroll.
 - 2. Use the multi-read enrollment option. Capture at least 3 prints
 - Capture prints for at least two fingers (the same finger on each hand).
- Use progerssive enrollment.
 The progressive enrollment setting allows the sensor to learn and improve matching ability each time the employee successfully clocks.
 Allow the system to track at least 4 progressive prints per employee.
 After enrollment, have the employee clock in/out at least 5 times to get the progressive enrollment started.

- Try different fingers
 Some employees have one or more fingers that are harder to read than others.
 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

C							
Teleph Clock	hone Desktop Time						
•			Global C	lock Settings			
			Cloc	k List			
	🔺 Name	IP Address	MAC Address	Serial Number	Last Accessed	Active	Client Version
۰.	▲ Name Master Station	IP Address 10.0.2.15			Last Accessed 738 days, 23 hours ago		Client Version 5.0.58
њ њ т			MAC Address	Serial Number			
+ + T	Master Station	10.0.2.15	MAC Address 52:54:00:12:34:56 52:54:00:12:34:56	Serial Number A08000S25500247	738 days, 23 hours ago	Yes	
+ + +	Master Station imeIPS Master Server	10.0.2.15 10.0.2.15 192.168.1.121	MAC Address 52:54:00:12:34:56 52:54:00:12:34:56 00:1F:B0:00:04:12	Serial Number A08000S25500247 A08000S25500201	738 days, 23 hours ago 111 days, 3 hours ago	Yes Yes	5.0.58

Click on the + (plus) sign to the left of the Clock Name to view its settings.

General Tab

				k List		
	🔺 Name	IP Address	MAC Address	Serial Number	Last Accessed	Active Client Version
-)	Master Station	10.0.2.15	52:54:00:12:34:56	A08000S25500247	738 days, 23 hours ago	Yes 5.0.58
	General Departments	Input Clock Threshol	ds Offline and Timeout	Security and Validation	Network Time Administrativ	e
	Name				Master St	tation
	Change Division M	Membership			Ke	eler Co. 🗘
	Activated					2
	Lock Quickset We	b Interface				
	Monitor Clock					
	Monitor Wait Time	2				00:30:00
	Message Display	Time				00:00:05
	Input Timeout					00:00:30
	Additional Confirm	nation Sounds			Do Not Play	•
					🔊 Revert Row	🔒 Save Row

- $\bullet\,$ Enter a \mathbf{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

			Clock Li				
	▲ Name A12218S12500000	IP Address 192.168.1.136	MAC Address 00:1F:B0:00:08:A9	Serial Number A12218S12500000	Last Accessed 2 minutes ago	Active Yes	Client Version 5.2.12
							5.2.12
			Offline and Timeout Se	curity and Validation Netwo	ork Time Administrat	ive	
	Clock's Default Dep	partment			2 Proc	luce	<u> </u>
	Department Promp	oting Method		Do Not Pro	mpt (Accepts Sr	nart Cl	ocking) 📩
	Smart Clocking Ac	tion	Use De	partment Prompting	Method or Emplo	yee's [Default 🗾
	Delimiter				**		
	department). Not Associated		_	Associated Depar	tments		
						_	
	lot / issociated		<u>^</u>	1 Meat	ancins	^	1
				2 Produ	ice		I
- 1				3 Dairy			I I
			✓	, ,		2	
1					🔊 Revert Row		Save Row

- 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 2**1003. (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.	 He is clocked in to that department. Clock will prompt again to enter a department code. He is clocked in with NO department specified.
Text Input	Always Use Employee's Default	I. Employee with a default dept assigned enters his badge number. Employee with NO default dept assigned enters his badge number.	 He is automatically clocked in to his Default Dept without being prompted to enter a dept code. 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
Select From List	Always Use Employee's Default	Employee types in his badge number.	with. 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	 Employee with a default dept assigned enters his badge number. Employee with NO default dept assigned enters his badge number. 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	 Employee types in his badge number. 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	 Employee types in his badge number. 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

🔺 Name	IP Address	MAC Address	Serial Number	Last A	ccessed	Active C	lient Versio
Master Station	10.0.2.15	52:54:00:12:34:56	A08000S25500247	738 days, 2	3 hours ago	Yes	5.0.58
General Departments	Input Clock Threshol	lds Offline and Timeout	Security and Validation	Network Time	Adminis trativ	e	
Accepted Input					Accept Bo	:h	\$
Clock Note Input					In: Pror	npt	\$
					Out: Pror	npt	0
Job Code Input					Text	Input	0
Work Order Input					Text	Input	0
Work Order Valida	tion				Validat	e at Clo	ock 🗘
Work Order Comp	letion Input				Dol	lot Pror	npt 🗘
Messages Require	Confirmation				Do	not Req	uire 🗘
				S Re	evert Row	🔒 Sav	e Row

el - -l- L-

- 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

		Cloc	List				
🔺 Name	IP Address	MAC Address	Serial Number	Last Ac	cessed	Active	Client Version
Master Station	10.0.2.15 52	:54:00:12:34:56	A08000S25500247	738 days, 23	3 hours ago	Yes	5.0.58
General Departments I	nput Clock Thresholds	Offline and Timeout	Security and Validation	Network Time	Adminis trative		
Clock In Threshold					0		
					No Action		0
Clock Out Threshold	d				0		
					No Action		0
Job Change Thresh	old				0		
					No Action		0
				S Re	evert Row	🔒 Sa	ve Row

- 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

				Cloc	:k List				
🔺 Name		IP Address		MAC Address	Serial Number	Last Ac	cessed	Active C	lient Version
Master Station		10.0.2.15	52	:54:00:12:34:56	A08000S25500247	738 days, 23	hours ago	Yes	5.0.58
General Departments	Input	Clock Thresh	olds	Offline and Timeou	t Security and Validation	Network Time	Adminis trative		
Clock Group Identi	fier						group1		
Connection Timeou	ut						15		
Reconnection Wait	Time	•						00:	05:00
Offline Mode Confi	gurat	ion					Fallback	to Off	line 🗘
Offline Rebooting									Enable
							Reboot af	ter: 00:	05:00
Configuration Chee	k Fre	quency					N	1in: 00:	02:00
							м	ax : 00:	05:00
						S Re	vert Row	🔒 Sav	ve Row

- 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 <u>Clock Distribution helper</u> 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

		Cloc	k List		
🔺 Name	IP Address	MAC Address	Serial Number	Last Accessed	Active Client Version
Master Station	10.0.2.15	52:54:00:12:34:56	A08000S25500247	738 days, 23 hours ago	Yes 5.0.58
General Departments	Input Clock Thresh	olds Offline and Timeout	Security and Validation	Network Time Administrativ	e
Require Validation					
Enable Device Bad	lge and PIN for V	alidation			
Device Badge				+-12345*	
Device PIN				*12345-+	
Display as you Typ	oe				S
Biometric Device O	Options			Flag but Allo	w Clocking 🗘
Re-probe Biometri	cs				
Require Biometrics	s on Clock In				
Require Biometrics	s on Clock Out				
Require Biometrics	s on Job Change				
Require Biometrics	s on Smart Clock				1
				🔊 Revert Row	🔒 Save Row

• 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 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

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 Clocking, check the box.
- Click on the Save Row button to apply the settings.

Network Time Tab

					Cloc	k List				
	🔺 Name		IP Address		MAC Address	Serial Number	Last A	ccessed	Active	Client Version
-)	Master Station		10.0.2.15	52	:54:00:12:34:56	A08000S25500247	738 days, 2	3 hours ago	Yes	5.0.58
	General Departments	Input	Clock Thres	holds	Offline and Timeout	Security and Validation	Network Time	Adminis trative		
	Network Time Synchronization Source									
	NTP Servers						ntp.timeips.c	om		
		_		_					_	
							🔊 Re	evert Row	🔒 Sa	ve Row

- 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

				Cloc	:k List					
🔺 Name		IP Address	MAC A	ddress	Serial Number	Last Ac	ccessed	Active	Client	Version
Master Station		10.0.2.15	52:54:00	:12:34:56	A08000S25500247	738 days, 23	3 hours age) Yes	5.	0.58
General Departments	Input	Clock Thresho	olds Offline	and Timeou	t Security and Validation	Network Time	Adminis trativ	/e		
Enable Remote Se	rvice							Disabl	ed	٢
Clock Time Zone				Cent	tral Time (Automatio	DST) CST ((UT C-6)			٢
Merge Clocks		Nam	e (Serial I	Number) (MAC Address) (IP A	ddress)				\$
						Re	evert Row	🗖 Sa	ve R	.ow

- 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".

 - Prabled: Remote service will be turned on and activated. After this check in a benefit with a backet in a benefit with a backet in a benefit with a backet in a b
 - 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 <u>Installation Guide</u> 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 <u>Downloads</u>.

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.mvcompany.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

E	Clock Admini	stration					
Telep Cloc							
			Global C	lock Settings			
			Cloc	k List			
	🔺 Name	IP Address	MAC Address	Serial Number	Last Accessed	Active	Client Version
<u>ال</u>	Master Station	10.0.2.15	52:54:00:12:34:56	A08000S25500247	738 days, 23 hours ago	Yes	5.0.58
±) :	Master Station TimeIPS Master Server	10.0.2.15	52:54:00:12:34:56 52:54:00:12:34:56	A08000S25500247 A08000S25500201	738 days, 23 hours ago 111 days, 3 hours ago	Yes Yes	5.0.58
+ + +				A08000S25500201			5.0.58
	TimeIPS Master Server	10.0.2.15 192.168.1.121	52:54:00:12:34:56 00:1F:B0:00:04:12	A08000S25500201	111 days, 3 hours ago	Yes	

Click on the + (plus) sign on the left side of the Global Clock Settings bar.

Firmware Tab

8	Global Clock Settings						
Firmware Rapid	re Rapid Clocking New Clock Configuration VGA Dis play						
Use a Custon	Use a Custom Firmware Location						
Firmware Up	Firmware Update Location				timeips.com/updates		
			Update Glo	bal Clock Configuration			

• 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 Configuration button to apply the settings.

Rapid Clocking Tab

Global Clock Settings	
Firmware Rapid Clocking New Clock Configuration VGA Display	
Warning Time for Clock In	60 seconds
Warning Time for Job Change	60 seconds
Warning Time for Clock Out	60 seconds
Update Global Clock Configuration	

• 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 Configuration button to apply the settings.

New Clock Configuration Tab

	Global Clock Settings		
Firmware Rapid Clocking New Clock Configure	ation VGA Dis play		
Automatic Activation			
Display as You Type			
Timeout Configuration		Wait 3 seco	onds
		Retry after 00:01:0	0
Configuration Check Frequency		Min 00: 02: 0	0
		Max 00:05:0	0
Accepted Input		Accept Both	٥
Clock Note Input		In Prompt	\$
		Out Prompt	٥
Job Code Input		Text Input	\$
Work Order Input		Text Input	٥
Work Order Validation		Validate at Clock	٥
Work Order Completion Input		Do Not Prompt	0
Default Division		Keeler Co.	٥
	Update Global Clock Configuration		

• 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 Configuration button to apply the settings.

VGA Display Tab

=			Glo	bal Clock Settings	
Firmware	Rapid Clocking	New Clock Configuration	VGA Dis play		
Show E	mployee Stat	us List			
First Na	me Format				Full First Name
Last Na	me Format				Full Last Name 🗘
			Update Glo	obal Clock Configuration	

- 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 Configuration 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.

Setup New Device	
 Plug in the power and connect a telephone to the jack labeled "PHONE." Do not connect any Lift the receiver and dial "***73738 # on the telephone and dial 1 to confirm. Hang up the Lift the receiver. When you hear a tone, dial "***7932 # on the telephone, then dial 1 # 1. Connect the device to the local network by plugging into the INTERNET port. Lift the receiver. When you hear a tone, dial ****110 #. Listen to the IP address it reports a Address" to the right, then hang up the phone. If possible, provide a static IP on your internal network for the telephone clocking device. Enthe Address" to the right. This is the recommended configuration. If you do not specify an IP addit to use DHCP and the address may change from time to time making maintenance and configure difficult. Optional: If you would like to set the default Caller ID of the device, you may specify this in "C if you do not specify a Caller ID, one will be automatically generated. Click the "Configure" button below to allow TimeIPS to connect to the device and configure it to the "Configure" button below to allow TimeIPS to connect to the device and configure it to the configure it to the televice and configure it to the configure. 	phone when instructed, Hang up the phone afterward. and record it in "Current IP er the address in "Static IP ress, the device will attempt uration of the device more Caller ID Name" to the right.
Current IP Address The VoIP device's current IP configuration, as specified during Step 5.	192.168.1.113
Static IP Address A new static IP that the VoIP device will be assigned. If blank, the VoIP device will rely on DHCP.	
Subnet Mask The subnet mask the VoIP device should be configured to use.	255.255.255.0
Default Route The default route the VolP device should be configured to use.	10.0.2.2
Caller ID An option caller ID that can be used to identify this VoIP device.	VolP 1
Configure	

• Once you hit Configure, an Attempting to Register box pops up, then disappears when it's finished.

Attempting to Register	
We are attempting to register your new VoIP device. Please be patient as this may take a while.	

• Configured Devices then appear in the **Existing Devices** list.

		Existing Devices		
	Extension	Caller ID	IP Address	
	1001	VolP 1	192.168.1.113	
\bigtriangledown				100 🗘

• Click on the + (plus) sign to the left of the configured device to review, edit, and even delete the device from your system.

	Existing Devices	
Extension	Caller ID	IP Address
1001	VolP 1	192.168.1.113
Extension The unique extension for this VoIP device	. This cannot be changed.	1001
IP Address The IP address of the configured device.	This cannot be changed.	192.168.1.113
Caller ID A memorable identifier used to assist in d	ifferentiating each device.	VolP 1
Note A helpful, descriptive note to associate wit	th this device.	
Delete Device You can completely remove this device fro completely re-registered.	om your system. This operation cannot be	e undone. The device will have to be
		Revert Row 🔒 Save Row
$\overline{\checkmark}$		100 🗘

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.

Connect an analog phone to the jack labeled **Phone** on the VOIP box. Ensure that the network cable is NOT connected.
 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.

- Enter 101#. It will then ask you to enter a value.
 Enter 1#. It will then say "To save press 1."
 Press 1 to save. This will take you back to the configuration menu.
 Enter 11#. It will then ask you to enter a value followed by the pound key.
 This is where you will enter the IP you wish the VOIP device to use.

NOTE: Use * for dots. Example 192*168*1*101.

- After you enter the IP address, press #. To save press 1.
 Enter 121#. It will then ask you to enter a value followed by the pound key.
 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.

- After you enter the netmask, press #. To save press 1.
 Enter 131#. It will then ask you to enter a value followed by the pound key.
 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.

After you enter the gateway, press #. To save press 1.
 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.

			Division Settings	
	8		Keeler Co.	
General	Access Restrictions	Clocking Restrictions	Prompt Information Language	
ls a Pli	quirement N requirement when so, for which employ	n using a VoIP device yees.	Validate PIN numbers for a	ill employees
PIN Le When		the minimum require	ed length?	4 digits
lf your of the Voicep	VoIP devices are of TimeIPS server. rint Authorization	1	from TimelPS then enter the publi	CIP address
clock.	This recording can	be used to verify the i	to state his or her name for each dentity of the employee who is clo a selected period of time.	ocking in or out. To manage the size of
Voicep	rint Backup Size			0.00
				🔊 Revert Row 🛛 🔚 Save Row
				100

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" setected in the employee's record on the Employee Administration page.
- 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.

Select the minimum **PIN Length** using the pull-down.
 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 auestion.

Ø.	Time	Report
----	------	--------

	Edit Event for	Boresow, Patty
Time In:		Time Out:
07/24/2013 02:27:43	PM CST	07/24/2013 05:09:07 PM CST
Location: VolP 1	(1001)	Location: VoIP 1 (1001)
Select Location	Гуре 🗘	Select Location Type 🗘
Insert Before Delete Voice Authorize	Insert After ation	Insert Before Delete Insert After Voice Authorization
Department:	No Department 🗘]
Voice Notes:	There is a voice clock not	e attached to this event.
Job:	Unassigned 🗢	
Clock Note (In): Entered when clocking in by the employee. For example: jobnote++jobnum*badgenum		<u>اللہ </u>
Clock Note (Out): Entered when clocking out.		
Audit - Last Audit Note:	View Full Audit	
Audit Note:		
Pay Type Override:	Type Of Pay Counts Toward Overtime	Follow Overtime Policy Rules Follow Overtime Policy Rules
Pay Override:	Hourly Rate Hourly Differential Rate Multiplier	 %
Tip: When editing an event while still clocked in, do not select anything Out" to leave them clocked in.		1 Tip: After selecting the date and time, click anywhere outside of the calendar to close it.
	Update Split Insert B	reak Cancel Delete

Access Restrictions

Under Access Restrictions, you can control which phone numbers will be granted access when calling your TimeIPS Telephone Clocking system.

	Division Settings						
	-			Kee	eler Co.		
			Clocking Restrictions	rompt Information Langu	age		
Thes	ss Restri se restricti ne TimelP.	ons apply to	all calls that are recei	Do not restrict a	access by C	Caller ID	0
_						Bevert Row	🔒 Save Row

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.

If creating a Whitelist or Blacklist to restrict caller access, the option to Add New entries will appear.
 Under Add New Restriction Entry, click the "Add New" button.

Add New Restrictio	n
Caller ID	913.468.1331
This caller ID name or number must match exactly as it appears in the call log in order properly take effect. Note A brief optional note field used to help ident this caller ID	out of the area
Add New Cancel	

In the Caller ID field, enter the name or number exactly as it appears in the call log.
 (OPTIONAL) Add a brief Note to help identify the Caller ID.
 Click "Add New" to save.
 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.

Add New Restriction Entry Add a new caller ID restriction entry.			Add New
Caller ID 913.468.1331	Note out of the area	Last Called <i>Never</i>	Delete X 100 0
		🔊 Revert Row	Save Row

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.

		Division Settings		
		🔺 Division		
		Keeler Co.		
General Access Restrictions	Clocking Restrictions Pro	ompt Information Language		
Clock In/Out Restriction These restrictions only app attempting to clock.		Do not allow the following	Caller IDs to cloo	k (blacklist) ≎
Add New Restriction En Add a new caller ID restric				Add New
Caller ID	Note	Last Called		Delete
		No Results Found		
\bigtriangledown				100 \$
			Bevert Row	Save Row

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
- O only allow the following Caller IDs to clock (interlist): An inset Caller ID names/numbers will be allowed to clock in/out from the TimeIPS Telephone Clocking system, 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.



- In the Caller ID field, enter the name or number exactly as it appears in the call log.
 (OPTIONAL) Add a brief Note to help identify the Caller ID.
 Click "Add New" to save.
- 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 🗙 and confirm deletion.

Add New Restriction Entry Add a new caller ID restriction entry.			Add New
Caller ID 913.468.1331	Note out of the area	Last Called <i>Never</i>	Delete X 100 0
		Revert Row	🔒 Save Row

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 Numeric 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.

		Division Settings			
Division Keeler Co.					
General Access Restriction:	Clocking Restrictions				
Department Prompt Should the system prom	pt the employee for a d	lepartment?	Prompt if Departmen	ts Available 🗘	
Job Prompt Should the system prom	pt the employee for a j	ob?	Prompt if Jol	bs Available ≎	
Numeric Clock In Note Should the system prom		lock in note?	Dol	Not Prompt 🗘	
Numeric Clock Out Not Should the system prom		lock out note?	Do	Not Prompt 🗘	
Numeric Job Change N Should the system prom		note when changing jobs?	Do	Not Prompt 🗘	
In / Out Clocking Mode Should the system suppo		cking options?	Prompt 1 for In	/ 2 For Out 🗘	
			🔊 Revert Row	🔒 Save Row	
				100	

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.

-			Division Sett					
	▲ Division							
				Keeler	Co.			
General	Access Restrictions	Clocking Restrictions	Prompt Information	Language				
	Default Language English The default spoken language for VoIP calls. English							
Shoul	age Prompt d callers be given th e a different languag	e option to	Always prompt ca	iller to ch	noose a language	<u>.</u>		
					Revert Row	🔒 Save Row		
\bigtriangledown						100 🗘		

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.

-		Caller ID Log		
	▼ Time	Caller ID	Name	Accepted
	2013-07-24 17:09:41	1001	VolP 1	v
	2013-07-24 17:08:36	1001	VoIP 1	
	2013-07-24 14:32:44	1001	VoIP 1	V
	2013-07-24 14:31:23	1001	VoIP 1	V
	2013-07-24 14:30:21	1001	VoIP 1	V
				100 3

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:

IP address of your Asterisk system
 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 username=1100 internalcid=<callerID you'd like to see when CID is not available> secret=<the password you selected in step 2> insecure=very userburded " 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=0.0.0.0/0.0.00 aeny=0.0.0/0.0.00 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 iitterbuffer=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: 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) srvloskup=yes ; Enable DNS SRV lookups on outbound calls externip=cexternIP where TimeIPS is> localnet=
colcalsubnet>/24
nat=yes
prodect 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=<vourpassword> 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]

dtnfmode=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 dtnfmode=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

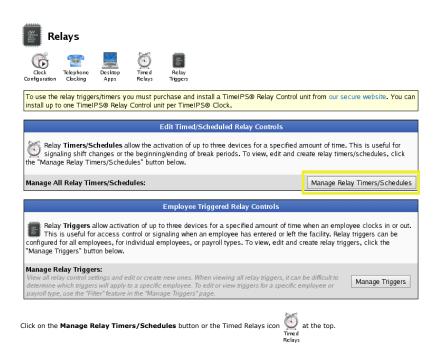
TimeIPS Desktop Clocking Application

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 <u>our secure website</u>. 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



🤨 Relay Timers	
Configuration Clocking Apps Triggers	
Add	New Relay Timer
• Action: Select an action to occur at the time specified below.	Turn On 🗢
• Relay Channels: Select one or more relay channels to be affected by this timer rule. To select multiple relay channels, hold down the Cttl key while clicking.	Relay 1 A Relay 2 Relay 3 V
• Time: Select the time the relay channel(s) specified above should occur.	
Duration: Select the duration, in seconds, before the timer action reverses itself. If not specified, the action will not be reversed.	seconds
Repeat: 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.	Every minutes for minutes.
• Days: Select one or more days when this timer will work. To select multiple days, hold down the Ctrl key while clicking.	All Days Monday Tuesday Wednesday Thursday Friday
• TimeIPS® Clock Stations: Select the TimeIPS® Clocks 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.	All Clocks A00000512000000 A10525512500420 Master Station TimeIPS Master Server TimeIPS Master Server V
Creat	e Timer Cancel
	Timers/Schedules
There are currently no Relay Timers/Schedules.	

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.

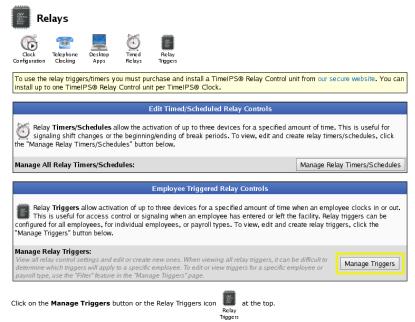


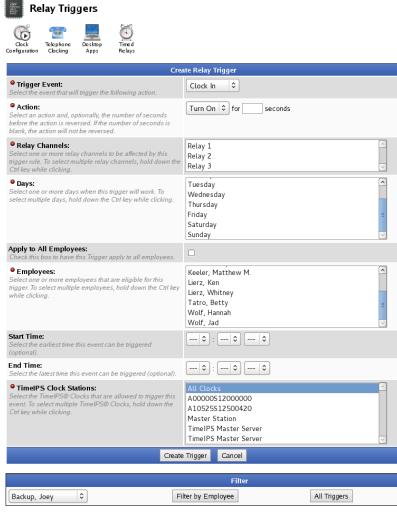
The created Relay Timers appear at the bottom of the page where they can Edited, Deactivated, or Deleted.

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 <u>our secure website</u>. 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





Mouse over rules below for more information.

Relay Triggers

There are currently no Relay Triggers set.

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.

	Filter					
Backup, Joey	Filter by Employee	Al	l Triggers			
	Mouse over rules below for more information.					
Summary of all Relay Trigger Rules						
On Fri turn ON relay 1 on Clock Out.		Edit	Deactivate	Delete		
• 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

Remote Clocking Administration Image: Clock ing the state of the							
		Remote Clocking License					
🔺 Employee	Division	Last Remote	Web Clocking	API Script User	API Script Target		
Backup, Joey	Keeler Co.	Never					
Boresow, Patty	Keeler Co.	Never	\checkmark				
Keeler, Larry	Keeler Co.	Never					
Keeler, Matthew M.	Keeler Co.	Aug 6, 2013 9:37 AM CDT					
Lierz, Ken	Keeler Co.	Never					
Lierz, Whitney	Keeler Co.	Never					
Tatro, Betty	Keeler Co.	Never					
Wolf, Hannah	Keeler Co.	Never					
Wolf, Jad	Keeler Co.	Never					
		Save Changes					

If you need to grant web-based remote access to more employees, purchase the Remote Employee Access m

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.





Tracking Fields icon and correlating support article.



IP Address Whitelist icon and correlating support article. IP Address Whitelist



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

Remote Clocking Administration							
	ddress ittelist						
▲ Employee	Division	Remote Clocking Licenses	S Web Clocking	API Script User	API Script Target		
Backup, Joey	Keeler Co.	Never					
Boresow, Patty	Keeler Co.	Never	\checkmark				
Keeler, Larry	Keeler Co.	Never					
Keeler, Matthew M.	Keeler Co.	Aug 6, 2013 9:37 AM CDT					
Lierz, Ken	Keeler Co.	Never					
Lierz, Whitney	Keeler Co.	Never					
Tatro, Betty	Keeler Co.	Never					
Wolf, Hannah	Keeler Co.	Never					
Wolf, Jad	Keeler Co.	Never					
		Save Changes		hand Smile	ees Selected: 1 / 1		

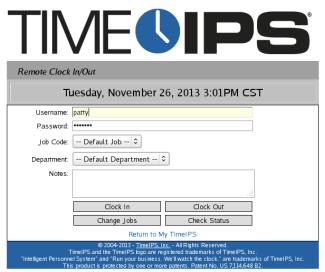
If you need to grant web-based remote access to more employees, purchase the Remote Employees Access module.





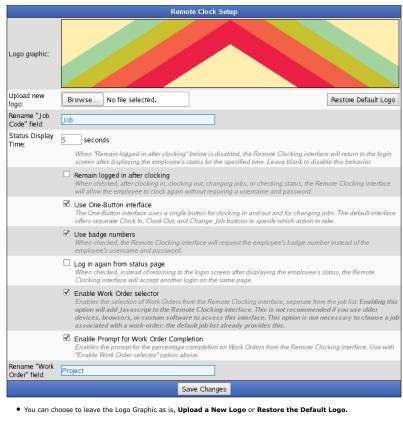
View Remote Clock

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.



• 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, separate 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 li	n/Out	
-	Tuesday, November 26, 2013	3 3:38PM CST
Badge Number:		
Project:	No Project 🗘	
Job:	Default Job 🗘	
Department:	Default Department 🗘	
Notes:		
	Clock In/Out	
	Check Status	
	Return to My TimeIPS	
	© 2004-2013 - <u>TimeIPS, Inc.</u> - All Right TimeIPS and the TimeIPS logo are registered trade nnel System ² and "Run your bus iness. We'll watch th This product is protected by one or more patents. Pa	emarks of TimeIPS, Inc. he clock." are trademarks of TimeIPS, Inc.

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.

Re	emote	Clocking Whitelist		
Remote	Clock			
Employees	Setup	Fields		
			Add New Whitelist	
_				Show Inactive Whitelists 🗎
			Remote Clocking Whitelists	
			1: All internal	
(#)			2: External Exceptions	
			3: Administration	
				100 🔻

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			
-					1: All internal			
Settings	IPs	Employees						
Name The n	ame	of this whitelist					1: All internal	
Comn A brie		nment about thi	s whitelist			Anyone on ou remote clockii	r internal networ ng.	k can use
	tiona		ion logic that will evalu llowed.	uate to true o	r false to determine if	a		
Active Toggl		whitelist as be	eing active or inactive.					Met Acti
		s whitelist as be	eing active or inactive.			[🔊 Revert Tab	🗹 Acti
Toggl		whitelist as be	ing active or inactive.		2: External Excepti	ons	🔊 Revert Tab	
Toggl		s whitelist as be	ing active or inactive.		2: External Excepti 3: Administration	ons	🔊 Revert Tab	

- 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.

		Remote Clocking Whitelists	
		▲ name	
-		1: All internal	
Settings	IPs	Employees	
These	are	the IP addresses that are allowed by this whitelist. Use an asterisk character * as a wildcard. Add IPs with t	he
🕈 Ad	1 IP	button to the right. Remove them with the ื icon to the left of the IP. Click 🖥 Save IPs when you are done	e
_	_		-
X 192.1	68.1	L.*	
		🕂 Add IP	P IP
(#)		2: External Exceptions	
(H)		3: Administration	
		1	00
			-

• 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."

				Remote	Clocking Wh ▲ n				
-					1: All i	nternal			
Settings	IPs	Employees							
	_		able Employees				Curren	t Members	
		Anna Walk Betty Walk Caleb Walk Carter Wall Casey Gilli Corbin Gilli Eleanor O'S Elisha O'SI	er ker ker han Shea		\$				
This w	hiteli	st allows cl	s Access To ocking at the specifie ly certain employees.		. You can use t	his option to		Any Employ	
					2: External		s		
+					3: Admir	histration			
									100

• 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.

	Remote Clocking Whitelists	
•	1: All internal 2: External Exceptior	15
Settings IPs Employees Name The name of this whitelist		2: External Exceptions
Comment A brief comment about this whitelist		Only these certain employees are allowed to use remote clocking from outside our network and only if they come from one of a few designated addresses.
Expression An optional bit of expression logic that will ev clock attempt should be allowed.	raluate to true or false to determine if a	
Active Toggle this whitelist as being active or inactiv	/e.	C Active
	3: Administration	Revert Tab 🔚 Save Tab
7	3. Administration	100 •

• 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.

	Show inactive writeins
	Remote Clocking Whitelists
	▲ name
	1: All internal
-	2: External Exceptions
Settings IPs Em	ployees
	 P addresses that are allowed by this whitelist. Use an asterisk character * as a wildcard. Add IPs with the tton to the right. Remove them with the X icon to the left of the IP. Click Save IPs when you are done. K 65.48.240.687 X 65.48.245.123
	🕂 Add IP 🔲 🖬 Save IPs
	3: Administration
	100

• Unlike the first whitelist which used a wildcard to match all internal addresses, this whitelist only allows access coming from three specific addresses.

		Remote Clocking Whitelists ▲ name		
		1: All internal		
-		2: External Exception	ns	
Settings IP:	s Employees			
	Available Employees		Current Members	
	Betty Walker Caleb Walker Casey Gillihan Corbin Gillihan Eleanor O'Shea Elisha O'Shea Emily Gillihan Jamie O'Shea		Anna Walker Carter Walker Jacob L. Walker Katie Chilcote Kell Walker	
This white these add	telist Allows Access To elist allows clocking at the specified dresses to only certain employees.	I IP addresses. You can use this option	to further restrict	
		3: Administration		
			100) 🔻

• 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.

	1: All internal 2: External Exceptions 3: Administration		
•			
Settings IPs Emp	lovees	0.71011	in instruction
Name The name of thi			3: Administration
Comment A brief commen	t about this whitelist		This whitelist allows access to anyone fro our Administration organizational unit.
	of expression logic that will evalua lock attempt should be allowed.	ate to true or false to	=if([user][orgUnit][name] = "Administration", true, fals
Active Toggle this whi	elist as being active or inactive.	l	C Act
			🔊 Revert Tab 🔚 Save T
			10

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
	[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]	An arbirtrary control number for this department
code	[ctrlNum] [user][defaultDepartment]	The code for this department. This is the code employees might type at the clock
subCode	[code] [user][defaultDepartment]	An optional subcode for this department
glNum	[subCode] [user][defaultDepartment]	An optional GLE. Number for this department.
altNum	[glNum] [user][defaultDepartment]	
trackTime	[altNum] [user][defaultDepartment]	An optional alternate number used by this department
	[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]	The date work on this work order is intended to begin
dateDue	[dateStart] [user][defaultworkOrder]	The due date of this work order
note	[dateDue] [user][defaultworkOrder]	A note associated with this work order
customer	[note] [user][defaultworkOrder]	A starting point for information about the customer on this work order
custID	[customer] [user][defaultworkOrder]	
name	[customer][custID] [user][defaultworkOrder]	This customer's unique database ID
addr1	[customer][name] [user][defaultworkOrder]	The name of this customer
	[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][default]ob]	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][default]ob][code]	The job code used to clock in to this job
name	[user][default]ob][name]	The name of the job
ctrlNum	[user][defaultJob][ctrlNum]	A control number associated with the job
billingRate	[user][default]ob] [billingRate]	A billing rate associated with the job
glNum	[user][defaultJob][glNum]	A G.L. number for the job
description	[user][default]ob] [description]	Any description provided about the job
subCode	[user][default]ob][subCode]	An arbitrary sub code identifier for the job
μ	I	

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	
addrl	[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: <u>Remote Clocking Whitelists</u> <u>Supported Functions For Advanced Expressions</u> <u>QuickBooks Pay Item Expressions</u> <u>Schedule Groups Break Rules Expression Variables</u>

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

- 327 of 529

- # 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}

- {Record after the beep of * to 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 - Fxit

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 # 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 - Fxit

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

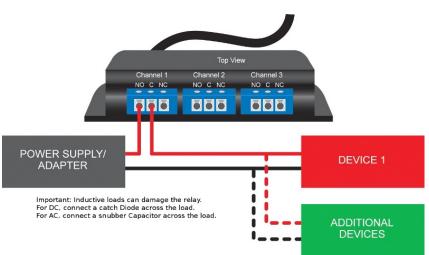
Note: The configuration and operation of the RLY-3CH-PS2 and RLY-3CH-USB are identical and are both referred to as a TimeIPS Relay Control System.

- 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.





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:

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.

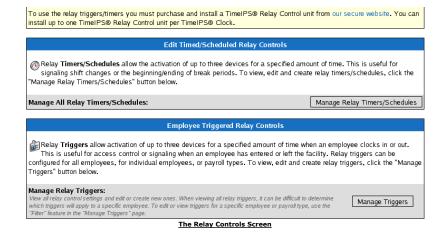
2. Choose your signaling device.

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.

Using the left pane main menu, click on Administration » Clocking » Relay Controls

^{3.} Setup a Timed/Scheduled Relay Control.



a. Click on the Manage Relay Timers/Schedules button.

New Relay Timer
Turn On 🗢
Relay 1 A Relay 2 Relay 3 V
1 ♦ : 00 ♦ AM ♦
seconds
Every minutes for minutes.
All Days Monday Tuesday Wednesday Thursday Friday V
All Clocks AD6029P51400140 A080399512000210 Master Station

Timed/Scheduled Relay Controls

b. Select/enter the options as indicated in the screen shot (above).

NOTE: Required fields are indicated by red bullets.

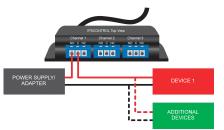
NOTE: Review the field level instructions on the screen.

- 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

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.

Edit Timed/Scheduled Relay Controls				
Relay Timers/Schedules allow the activation of up to three devices for a specified amount of time. This is useful for signaling shift changes or the beginning/ending of break periods. To view, edit and create relay timers/schedules, click the "Manage Relay Timers/Schedules" button below.				
Manage All Relay Timers/Schedules:	Manage Relay Timers/Schedules			
Employee Triggered Relay Controls				
Belay Triggers allow activation of up to three devices for a specified amount of time when an employee clocks in or out. 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. To view, edit and create relay triggers, click the "Manage Triggers" button below.				
Manage Relay Triggers: View all relay control settings and edit or create new ones. When viewing all relay triggers, it can be difficult to which triggers will apply to a specific employee. To edit or view triggers for a specific employee or payroll type, "Filter" feature in the "Manage Triggers" page.				

Relay Controls

a. Click on the Manage Triggers button.

Crea	ate Relay Trigger
Trigger Event: Select the event that will trigger the following action.	Clock In \$
 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. 	Turn On ♦ for seconds
Relay Channels: 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.	Relay 1 Relay 2 Relay 3
Days: Select one or more days when this trigger will work. To select multiple days, hold down the Ctrl key while clicking.	All Days Monday Tuesday Wednesday Thursday Friday
Apply to All Employees: Check this box to have this Trigger apply to all employees.	
Employees: Select one or more employees that are eligible for this trigger. To select multiple employees, hold down the Ctrl key while clicking.	Kosjer, Lewis Lever, Anna Linschied, Aaron Love, Rudy Ngo, Tony Rassette, Emily
Start Time: Select the earliest time this event can be triggered (optional).	···· ↓ : ···· ↓ ···· ↓
End Time: Select the latest time this event can be triggered (optional).	
 TimeIPS Clock Stations: Select the TimeIPS® Clocks that are allowed to trigger this event. To select nulpple TimeIPS® Clocks, hold down the Ctrl key while clocking. 	All Clocks A06029P51400140 A08039512000210 Master Station
Create	Trigger Cancel
	Filter
Lever, Anna	Filter by Employee All Triggers

Relay Trigger SetUp Screen

b. Select/enter the options as indicated in the screen shot (above).

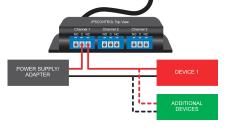
NOTE: Required fields are indicated by red bullets.

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		www.jameco.com Catalog Part #: 1952855
12 Volt Power Adapter "AC/DC Power Supply Single- Output 12 Volt 2.08A 25W Carton"	Mean Well		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

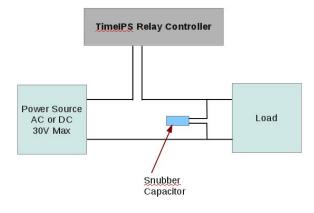
Door Locks	Manufacturer	Part Number	Sample Vendors
Electric Door Lock "Electric Door Strike for Metal Doors"	www.seco-larm.com		www.seco-larm.com Part: SD-994C
Electric Door Lock "Electromagnetic Lock"	Locknetics		www.grainger.com Part #: 4GD81
Door Strike	Folger Alarms		www.grainger.com 4RM51
Door Strike	Folger Alarms		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.

Benefit Log **Display Options** Select Employee 🔍 Boresow, Patty \$ View/Use Benefits lse Benefit Tim Effective Date 08:00:00 AM CST 11/27/2013 Benefit Type \$ Sick Hours 00:00:00 Note Department -- Default Department -- 🗘 Split and Save Save Current L • Sick 220 hrs 39 min 220 hrs 39 min Add Reset Add Reset Vacation 198 hrs 5 min 198 hrs 5 min 100 🗘 Edit Benefit Usage V Effective Dat **(H)** 08:00 AM 10/25/2013 Sick Non Keeler, Matthew M. 03:00:00 Delete No 100 🗘 Total Benefit Time Used: 3 hrs Full Benefits Log

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.
- Hours: Input the amount of time that the employee has required.
 Note: An optional comment describing the reason for the request.
 Select the Department associtated with this benefit usage.

-	Use Benefit Time
Effective Date	12/23/2013 01:00:00 PM CST
Benefit Type	Vacation 🗾
Hours	08:00:00
Note	
	ii.
Department	Default Department \$
	Split and Save Save

• 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.

	Split Request
	How would you like to split this request?
	By 8 Hour Weekdays By Schedule Cancel
Make sure the Effecti	e Date is set to when you want the benefit usage to start. The system will attempt to split i

Confirm
Monday, December 23rd, 2013 01:00:00 PM 4 <i>hrs</i> Tuesday, December 24th, 2013 08:00:00 AM 4 <i>hrs</i>
Submit Cancel

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.

Current Levels							
	🔺 Benefit	Current Available	Net Available	Future Pending Requests	Future Approved Usages	Add	Reset
•	Sick	220 hrs 39 min	220 hrs 39 min	0 hrs 0 min	0 hrs 0 min	Add	Reset
•	Vacation	198 hrs 5 min	198 hrs 5 min	0 hrs 0 min	0 hrs 0 min	Add	Reset
						10	00 0
∇							

• 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.

		C	urrent Levels		
🔺 Benefit	Current Available	Net Available	Future Pending Requests	Future Approved Usa	ges Add Re
Sick	220 hrs 39 min	220 hrs 39 min	0 hrs 0 min	0 hrs 0 min	Add Re
Vacation	190 hrs 5 min	182 hrs 5 min	0 hrs 0 min	8 hrs 0 min	Add Re
Benefit Ledger	Accrual Rate				
A	djustment Time		Action	Amount	Total
0	08:00 AM 12/24/2013		Benefit use.	-04:00:00	182:05:24
(01:00 PM 12/23/2013		Benefit use.	-04:00:00	186:05:24
08	3:00 AM 11/27/2013		Benefit used.	-08:00:00	190:05:24
12	2:00 AM 11/21/2013	A	utomatic accrual.	02:07:48	198:05:24
12	2:00 AM 11/14/2013	A	utomatic accrual.	02:07:48	195:57:36
12	2:00 AM 11/07/2013	A	utomatic accrual.	02:07:48	193:49:48
12	2:00 AM 10/31/2013	A	utomatic accrual.	02:07:48	191:42:00
12	2:00 AM 10/24/2013	A	utomatic accrual.	02:07:48	189:34:12
12	2:00 AM 10/17/2013	A	utomatic accrual.	02:07:48	187:26:24
12	2:00 AM 10/10/2013	A	utomatic accrual.	02:07:48	185:18:36
12	2:00 AM 10/03/2013	A	utomatic accrual.	02:07:48	183:10:48

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.

			irrent Levels		
🔺 Benefit	Current Available	Net Available	Future Pending Requests	Future Approved Usages	Add Re
Sick	220 hrs 39 min	220 hrs 39 min	0 hrs 0 min	0 hrs 0 min	Add Re
Vacation	190 hrs 5 min	182 hrs 5 min	0 hrs 0 min	8 hrs 0 min	Add Re
Benefit Ledge	Accrual Rate				
You current	ly accrue 2.13 hour	s weekly. Net hours	available may not exceed	250.	
					100

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.

336 of 529

- 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.

Amount to Add:	2 hours			
Amount to Aud.				
Effective:	11/27/2013 02:46:07 PM			
Comment:	Bonus for highest productivity			
Adjustment Instru				
Amount to Add is the employee's tot Effective is the da Comment is a cor	the number of Vacation hours that will be added to			
Amount to Add is the employee's tot Effective is the da Comment is a cor	the number of Vacation hours that will be added to al. te that this change will be made effective. mment that will appear in the benefits log.			

- P Enter the Amount of Time to be added in hours.
 P Enter the date/time this addition should be Effective.
 O 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.

			Cı	irrent Levels			
	🔺 Benefit	Current Available	Net Available	Future Pending Requests	Future Approved Usages	Add Reset	
+)	Sick	220 hrs 39 min	220 hrs 39 min	0 hrs 0 min	0 hrs 0 min	Add Rese	
	Vacation	192 hrs 5 min	184 hrs 5 min	0 hrs 0 min	8 hrs 0 min	Add Rese	
	Benefit Ledger	Accrual Rate					
	Adjustment Time 08:00 AM 12/24/2013			Action		Total	
				Benefit use.	-04:00:00	184:05:24	
1	01:00 I	PM 12/23/2013		Benefit use.	-04:00:00	188:05:24	
	02:46 l	PM 11/27/2013		d by Keeler, Matthew M. for highest productivity	02:00:00	192:05:24	
	08:00	AM 11/27/2013	Benefit used.		-08:00:00	190:05:24	
	12:00	AM 11/21/2013	Au	Automatic accrual.		198:05:24	
	12:00 A	AM 11/14/2013	Au	Automatic accrual. 02:07:48		195:57:36	

a				Full Ben	efits Log			
	Be	enefit Types:			Benefit Usages			
				<u> </u>	Benefit Grants			
Vacation								
					Benefit Resets	_		
					Automatic Accrual	s		
					Accruals Invalidate	ed by Recalcula	ation	
				\sim	🗌 Benefit Usages De	eleted by Manag	ger	
Display								
				Full Bene	fitlog			
Effective Date	Paid Date	Date Adjusted	Туре	Reason for Request	Reason for Adjustment	Adjuster	Adjustment	
Nov 27,13 2:46:07 PM CST	Effective	Nov 27,13 3:17:22 PM CST	Vacation	None	Bonus for highest productivity	Keeler, Matthew M.	+02:00:00	(Edit)
\bigtriangledown		· · ·						100 \$

Edit Benefit Usage

Edit Benefit Usages							
	Effective Date	Туре	Reason for Request	Reason for Adjustment	Adjuster	Duration	Actions
۲	08:00 AM 10/25/2013	Sick	None	None	Keeler, Matthew M.	03:00:00	Delete
							100 \$
\vee							
					Total E	Benefit Time	Used: 3

• Click on the + (plus) sign next to the Effective Date to view and edit the the benefit usage details.

Effective Date	Туре	Edit E Reason for Request	Benefit Usages Reason for Adjustment	Adjuster	Duration	Actions
08:00 AM 12/24/2013	Vacation	None	None	Keeler, Matthew M.	04:00:00	Delete
Requested Date				12/	24/2013 08:0	0:00 AM
Effective Date				12/24/2	013 08:00:00	AM
Paid Date				🗹 Sa	me as Effect	ive Date
Request Note Made by the employee w	vho requeste	d the benefit.				
Adjusters Note						.::!
Duration				04:0	0:00	
Benefit					Vaca	tion 🗘
Department			[No Department		\$
Add Audit Note						
				Severt R	ow 🔒 Sav	e Row
01:00 PM 12/23/2013	Vacation	None	None	Keeler, Matthew M.	04:00:00	Delete
08:00 AM 11/27/2013	Vacation	None	None	Keeler, Matthew M.	08:00:00	Delete
08:00 AM 10/25/2013	Sick	None	None	Keeler, Matthew M.	03:00:00	Delete
						100 🗘
\checkmark				Total Be	nefit Time L	sed 19/

- 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 about benefit usage.
 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.

😑 Ful	l Benefits Log
Benefit Types:	🛒 Benefit Usages
Sick Vacation	Benefit Grants Benefit Resets Automatic Accruals Accruals Invalidated by Recalculation
Display	Benefit Usages Deleted by Manager
Full	Benefit Log
	ason for Request Reason for Adjustment Adjuster Adjustment
No F	Results Found
∇	100 \$

• 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.

-			Full B	enefits Log			
	Benefi	t Types:		🗑 🗹 Benefit I	Usages		
				🗹 Benefit	Crants		
Vacation							
				🗹 Benefit	Resets		
				Automat	tic Accruals		
				Accruals	s Invalidated by	Recalculation	
			~	🗑 Benefit I	Usages Deleted	by Manager	
Display					-		
			Full Be	nefit Log			
Effective Date	Paid Date	Date Adjusted	Type	Reason for Request	Reason for Adjustment	Adjuster	Adjustment
Oct 25,13		Oct 29,13				Keeler,	
8:00:00 AM CDT	Effective	3:31:03 PM CDT	Sick	None	None	Matthew M.	-03:00:00
Nov 27.13		Nov 27.13					
8:00:00 AM	Effective	11:59:51 AM	Vacation	None	None	Keeler, Matthew M.	-08:00:00
CST		CST				Matthew M.	
							100 \$
							100 \$

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 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



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

I my ben	efit Requests				
Benefits Calendar Details					
😑		Request Be	nefit Time		
Effective Date				12/10/2013	08:00:00 AM CST
Benefit Type					Sick 🗘
Hours				00:00:0	00
Note					
Department				Defaul	lt Department 💲
				Sp	lit and Save Save
		Current L	ovols		
🔺 Benefit	Current Available	Net Available	Future Pending Requests	Futu	re Approved Usages
🖷 Sick	227 hrs 55 min	227 hrs 55 min	0 hrs 0 min	Futu	0 hrs 0 min
				Futu	0 hrs 0 min 0 hrs 0 min
🖷 Sick	227 hrs 55 min	227 hrs 55 min	0 hrs 0 min	Futu	0 hrs 0 min
🖷 Sick	227 hrs 55 min	227 hrs 55 min 202 hrs 21 min	0 hrs 0 min 0 hrs 0 min	Futu	0 hrs 0 min 0 hrs 0 min
🖷 Sick	227 hrs 55 min 202 hrs 21 min	227 hrs 55 min 202 hrs 21 min Pending Re	0 hrs 0 min 0 hrs 0 min quests		0 hrs 0 min 0 hrs 0 min 100 \$
🖷 Sick	227 hrs 55 min	227 hrs 55 min 202 hrs 21 min	0 hrs 0 min 0 hrs 0 min quests ate Type	Futu	0 hrs 0 min 0 hrs 0 min
🖷 Sick	227 hrs 55 min 202 hrs 21 min	227 hrs 55 min 202 hrs 21 min Pending Re Effective D	0 hrs 0 min 0 hrs 0 min quests ate Type		0 hrs 0 min 0 hrs 0 min 100 \$
🖷 Sick	227 hrs 55 min 202 hrs 21 min	227 hrs 55 min 202 hrs 21 min Pending Re Effective D	0 hrs 0 min 0 hrs 0 min quests ate Type		0 hrs 0 min 0 hrs 0 min 100 0
🖷 Sick	227 hrs 55 min 202 hrs 21 min	227 hrs 55 min 202 hrs 21 min Pending Ro Effective I You have no pending	0 hrs 0 min 0 hrs 0 min xquests ate Type benefit requests.		0 hrs 0 min 0 hrs 0 min 100 0
🖷 Sick	227 hrs 55 min 202 hrs 21 min	227 hrs 55 min 202 hrs 21 min Pending Re Effective C You have no pending Reviewed R Type Time Reques	0 hrs 0 min 0 hrs 0 min quests ate Type benefit requests. equests ted Time Approved		0 hrs 0 min 0 hrs 0 min 100 \$ Actions 100 \$
Image: Sick vacation Image: Wacation	227 hrs 55 min 202 hrs 21 min	227 hrs 55 min 202 hrs 21 min Pending Re Effective D You have no pending Reviewed R	0 hrs 0 min 0 hrs 0 min quests ate Type benefit requests. equests ted Time Approved	Requested	0 hrs 0 min 0 hrs 0 min 100 \$ Actions 100 \$

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.

		Pending Requests				
	🔺 Date Requested	Effective Date	Type	Requested	Actio	ns
	12/10/2013 02:13 PM	12/19/2013 08:00 AM	Sick	04:00:00	Dele	ete
	Request Note			doctors a	ppointment	
	Date			12/19/201	3 01:00:00	PM
	Amount			04:00:00		
	Benefit Type				Sick	0
	Department		·	No Departr	nent	0
			5	Revert Row	🔒 Save F	۲ow
$\overline{}$					10	00 0

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.

12/	Effective Date	Type Time	Reviewed Request: Requested Time Appr	oved Review		Review Date
	/26/2013 08:00 AM	Vacation 08	8: 00: 00 08: 00:	00 Keeler, Mat	thew M. 1	2/10/2013 01:49 PM
						100 \$
 A red X app 	pears in the Approv	al box if the req	uest has been Disa	approved.		
Approval	Effective Date	Type Time	Reviewed Request e Requested Time App	S roved Review	rer	Review Date
X 12	/26/2013 08:00 AM		8:00:00 0	Keeler, Mat	thew M. 1	2/10/2013 02:00 PM
7						100 \$
	e Benefits Cal	-	top of the page.			
👏 Bene	fits Calenda					
•			Display Optior	15		
			Legend			
P P	ending Approval		🖉 Approved		\$	Holiday
\$			er 01, 2013 – Decem			Ę
Sunday 1 December	Monday 02 December	Tuesday 03 December	Wednesday 04 December	Thursday 05 December	Friday 06 December	Saturday 07 December
8 December	09 December	10 December	11 December	12 December	13 December	r 14 December
	4					
.5 December	16 December	17 December	18 December	19 December 4 Sick = Lierz, Whitney	20 December	r 21 December
5 December	16 December 23 December	17 December 24 December	18 December 25 December	4 Sick 🗖	20 December 27 December	
				4 Sick = Lierz, Whitney		

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 information. My Benefit Details

Benef	lit Benefit Log	ee Benefit D	etalis					
Repo	rt Reporting		Current	Levels				
	🔺 Benefit	Current Available	Net Available	Future Pending Requests	Fu	ture Approved	Usages	
Ы	Sick	227 hrs 55 min	227 hrs 55 min	0 hrs 0 min		0 hrs 0 mi	in	
ы)	Vacation	202 hrs 21 min	202 hrs 21 min	0 hrs 0 min		0 hrs 0 mi	in	
7							100	0
	Effective	Date Type	Edit Bene Reason for Request	fit Usages Reason for Adjustment	Adjuster	Duration	Actio	
	 Effective 	Date Type	No Resul		Adjuster	Duration	Actio	ons
7			no nesu	o i ouna			100	0
					Total B	enefit Time	Used:	0/
				nefits Log				_

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.



D.	ack Edir Optio		Benefits Calendar							
-			*****		Displa	y Options				
				🔍 🛛 All Visi	ble Employ	ees In Keeler	• Co. 🔷			
				Edit Emplo		on Groups an Display	d Presets			
					Pending	Requests				
	🔺 Requested	d On	Request	ed For	Employee	Type This Req	uest Total Requests	Future Use	Net Available	2
۲	12/10/2013 0 PM	02:13	12/19/2013 0 CS		Lierz, Whitney	Sick 4 hrs min		0.0000	227 hrs 55 min	Select Approval
					_					100 🗘
	Mark All A	pprove	d Mark All De	enied Ignore /						
					Atta	ch a note:				
					S	ubmit				
					Reviewed	Requests				
A	pproved	▲ Effe	ective Date	Employee	Туре	Hours Requested	Hours Approved	Revie	wer	Review Date
٠	✓ ^{12/2}		08:00:00 AM ST	Keeler, Matth M.	ew Vacatio	n 8 hrs 0 min	8 hrs 0 min	Keeler, M M		10/2013 02:10 PM
\bigtriangledown										100 🗘

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.

		Pending	Requests						
🔺 Requested On	Requested For	Employee	Type	This Request	Total Requests	Future Use	Net Available		
12/10/2013 01:41 PM	12/26/2013 08:00:00 AM CST	4 Keeler, Matthew M.	Vacation	8 hrs 0 min	8 hrs 0 min	0.0000	250 hrs 0 min	Select Aj	oprova
Request Note									
Date						12	/26/2013 0	B: 00: 00 A	M
Amount						08	: 00: 00		
Benefit Type								/acation	٥
Department						No E)epartmen	t	٥
) Revert	Row 🔒	Save Ro	w
								100) 🗘
Mark All Appro	oved Mark All Denied	Ignore All							
		Atta	ch a note:						
L		2	Submit						

- 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.

				Requests Hours	Hours		
Approved	Effective Date	Employee	Туре	Requested	Approved	Reviewer	Review Date
	12/26/2013 08:00:00 AM CST	Keeler, Matthew M.	Vacation	8 hrs 0 min	8 hrs 0 min	Keeler, Matthew M.	12/10/2013 01:49 PM
							100 \$
$\overline{\nabla}$							
 A red 	X appears in the Approva						
		ii box ii the reque	est has be	een Disappi	roved.		
	x appears in the Approve			een Disappi Requests	roved.		
Approved	Effective Date				Hours Approved	Reviewer	Review Date
	▲ Effective Date 12/26/2013 08:00:00 AM	Ru Employee Keeler, Matthew	eviewed I _{Type}	Requests Hours Requested	Hours Approved	Keeler, Matthew	12/10/2013 02:00
	Effective Date	R Employee	eviewed I _{Type}	Requests Hours	Hours Approved		

Requests listed in the Reviewed section, can still receive an approval change.

					Requests			
A	pproved	Effective Date	Employee	Type	Hours Requested	Hours Approved	Reviewer	Review Date
•	X	12/26/2013 08:00:00 AM CST	Keeler, Matthew M.	Vacation	8 hrs 0 min	8 hrs 0 min	Keeler, Matthew M.	12/10/2013 01:49 PM
	Appro	val					Арр	rove
	Reque	st Note						
	Review	ver's Note				Merry	Christmas!	
							🥱 Revert Row	🔚 Save Row
								100 🗘
\sim								

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.

MOTE: 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 icon icon icon fithe page, to set up your email notification options.
C Benefit Approvals
Back
My Benefit Request and Approval Options Send me an email immediately for every benefit usage request my employees make Include employees managed by people I manage Email Template Use default template Check for new benefit usage requests hourly, and send me a single email summarizing new requests made in that hour Include employees managed by people I manage Email Template Use default template Save
My Employees' Benefit Request and Approval Options Select employee group [Manage]: All Visible Employees In Keeler Co. View Employee 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.

🚰 в	enefit Approvals	
Back	Emai Akr	
Employe	Templates 's Request and Approval Options	
стрюуе		
	When this employee works less than their sched day, send a notification to everyone configured t receive their schedule using:	
Keeler.	Do not send an email 🗘	Do not send an email
Matthew		
м.	After 0 hours, automatic	cally deny 🗘 requests. To deactivate, set hours to 0.
		ail3], [emailDefault] to use existing email settings)
	Hours old Email addresses	Email Template
	When this employee works less than their scheo day, send a notification to everyone configured to receive their schedule using: Do not send an email	
Lierz, Whitney	After 0 hours, automatic	
	Email Reminders: (Actual email address, or [email1], [email2], [em Hours old Email addresses	ail3], [emailDefault] to use existing email settings) Email Template
	Tiours of Ellian autresses	Ellian feliplate
	□ Send emails when requests are reviewed us	ing the following template Use default template 🗘
	When this employee works less than their sched day, send a notification to everyone configured to receive their schedule using:	
T-+	Do not send an email 🗘	Do not send an email 🗘
Tatro, Betty	After 0 hours, automation	cally deny requests. To deactivate, set hours to 0.
	Email Reminders:	
		ail3], [emailDefault] to use existing email settings)
	Hours old Email addresses	Email Template

Once you have entered the $\ensuremath{\mathsf{Employee's}}$ $\ensuremath{\mathsf{Request}}$ and $\ensuremath{\mathsf{Approval}}$ $\ensuremath{\mathsf{Options}}$ 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.

Copy this information:	From this user:	To these users:	
Send emails on review	Keeler, Matthew M.	Keeler, Matthew M.	<u>^</u>
Scheduled daily hours email	Lierz, Whitney	Lierz, Whitney	
Scheduled weekly hours email	Tatro, Betty	Tatro, Betty	
Age for old requests	Keeler, Larry	E Keeler, Larry	
Action for old requests	Lierz, Ken	Lierz, Ken	
Email reminders	Boresow, Patty	Boresow, Patty	
	Wolf, Jad	Wolf, Jad	-
	🔍 Wolf, Hannah	🗸 Wolf, Hannah	

To View the Benefits Calendar

Click on the **Benefits Calendar** icon Benefits Cakendar

-			Display Optio	ns		
Start Date:	12/01/2013			Decimal	Places: 0	
End Date	12/31/2013			Name fo	ormat: System	n Default 🛛 🗘
User group [Ma	anage]: 🔍 🗛 All Vis	ible Employees Ir	NKeeler Co.	\$		
			Update Calenda	r		
			Legend			
- P	ending Approval		🖉 Approved		🕈 Ho	liday
4		December	01, 2013 - Decen	ıber 31, 2013		(
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 December	02 December	03 December	04 December	05 December	06 December	07 December
8 December	09 December	10 December	11 December	12 December	13 December	14 December
5 December	16 December	17 December	18 December	19 December	20 December	21 December
				4 Sick	-	
				Lierz, Whitney	-	
2 December	23 December	24 December	25 December	26 December	27 December	28 December
		4 Vacation 🛛 🖉				
	Boresow, Patty	Boresow, Patty	-			
9 December	30 December	31 December				
	1	1				

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

Er	nploy	ee Benet	fit Details	
Set/Reset Recakulate	Benefit Report	Benefit Log Reporting		
reculculate	Report	racporting	Display Options	
Select En	nployee			🕄 Boresow, Patty 💽
			View/Use 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



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
Set benefit totals to: 00:00:00 hours Effective at: 12/09/2013 12:35 PM For type: Sick 0 Comment:
Affected Employees:
Backup, Joey Boresow, Patty Keeler, Larry Keeler, Matthew M.
Lierz, Ken V
Set Cancel

- 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 Set benefit totals to: specified hours. Inis is the amount of time for an employee(s) or groups. The hours will be displayed in decime 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:

- 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.
 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 totals 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.

Recalculate Accruals
Recalculate accruals starting at: 12/09/2013 04:23 PM Affected Employees: Backup, Joey Boresow, Patty Keeler, Larry Keeler, Matthew M. Lierz, Ken
Recalculate Cancel

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 needed.
 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

Benefits Report		
Set/Reset Employee Benefit Log Recakulate Benefits Reporting		
	Choose Report Range	
Select Date Range	Today	0
	From: 12/09/2013 12:00:00 AM	CST
	To: 12/10/2013 12:00:00 AM	CST
Select Employee or Group	🔍 All Visible Employees In Keeler Co.	\$
Select Benefits to Display Sick Vacation		
Select Columns to Display ✓ Used during rang	e 🗆 Earned during range 🗹 Available at the end 🗖 Available at the beginning	
C Osed during rang	Payout amount at the end Pay Rate at the end	
	Display	

- 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
- O be the dup down ment to select a predement ange, such as this week is this bound i, and the current and as completed periods for your complet

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
∇							100 \$

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 groupTwo 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

Benefits Log Reporting		
tevReset Employee Benefit scakulate Benefit		
	elect Reporting Options	
Adjusted For	S Boresow, Patty	٥
Adjusted By	Limit Results by 'Ad	usted By
	🔍 All Visible Employees In Keeler Co.	\$
Date Range of Report	Custom Range	0
	11/01/2013 12:00:00 AM 01/01/2014 12:00:0) AM
Date Field	Date Adju	isted ≎
Benefit Usages		Include
Benefit Grants		Include
Benefit Resets	E Contraction of the second seco	Include
Automatic Accruals		Include
Accruals Invalidated by Recalculation		Include
Benefit Usages Deleted by Manager		Include
Benefit Types	Sic	c 🗠 ation 🗸
Display		Display

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 select the date. This field can also be dived and the select the date.
- 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 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 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.
 Benefit Grants
 Benefit Grants
 Benefit Grants

 - O 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	Туре	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
∇							(100 🗘

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

		C	reate New Benefit Type	
			urrent Benefit Types	
	🔺 Name	Paid	Counts Towards Overtime	
		Yes	No	In Use
+	Sick	res	10	in obc

Create a New Benefit Type

_	Create New Benefit Type	
Name	FMLA	
	Add	

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

	▲ Name	Paid	Current Benefit Types Counts Towards Overtime		
-	Sick	Yes	No		In Use
General	Advanced Subclasses				
Name				Sick	
Code N	ame			sick	
Paid					Yes 🗘
Counts	towards Overtime				No 🗘
Counts	towards Holiday Day	y Before/After	Rule.		Yes 🗘
				🥱 Revert Row	🔒 Save Row
	Vacation	Yes	No		In Use
					100 \$

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

	🔺 Name	Paid	Current Benefit Types Counts Towards Overtime	
	Sick	Yes	No	In Use
General	Advanced Subclasses			
	re Note esting time of this type r	equires providing a re	equest note.	Required
	Custom Message ge to enable the display	y of a custom messag	e to be shown when requesting a benefit.	Show Popup
	m Message ext that will be displayed	<i>d.</i>	Doctor's not sick time.	e required for extended
			R	evert Row 📙 Save Ro
9	Vacation	Yes	No	In Use
				100

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.

	▲ Name		Paid	Current Benefit Types Counts Towards Overtime		
	Sick		Yes	No	In U	se
General Name	Advanced Subclasses GLNum			Minimum Des	cription	+
		_				
					🔊 Revert Row 🛛 🔒 Save	Row
٠	Vacation		Yes	No	Revert Row 🔒 Save	

Add a Subclass

Click on the green + on the far right side.

Add subclass				
	Name: pre-scheduled			
	Create Cancel			

• Add a descriptive Name in the Add Subclass window that pops up, then click the Create button.

	▲ Name	Paid	Curre	nt Benefit Types Counts To	wards Overtime		
-	Sick	Yes			No		In Use
	anced Subclasses						
Name		GLNum		Minimum		Description	
pre-schedule	d	23100				ex: scheduled (dr.'s appt 🛛 🗶
						🔊 Revert Row	🔒 Save Row
	Vacation	Yes			No		In Use
\bigtriangledown							100

• 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.

Current Benefit Types				
	🔺 Name	Paid	Counts Towards Overtime	
	FMLA	No	No	Delete
	Sick	Yes	No	In Use
	Vacation	Yes	No	In Use
V				

• 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.

=	Default Accrual Groups				
Keeler Co. D	efault Accrual Group:	Hourly			
			Submit		
	Division	Existing Accrual Groups			
	Keeler Co.	Hourly			
	Keeler Co.	Salary			
\bigtriangledown			100 🗘		

Edit an Accrual Group - General

• Click the + (plus) sign next to the group's name to expand the settings section.

Division	Existing Accrual Groups		
Keeler Co.	Default		
General FMLA Sick Vacation			
Group Name: Default			
Employees in Other Groups:	Employees in Default:		
Backup, Joey	Boresow, Patty	Ø	
	Keeler, Larry	\checkmark	
	< Keeler, Matthew M.	\checkmark	
	Lierz, Ken	\checkmark	
	> Lierz, Whitney	\checkmark	
	Tatro, Betty	\checkmark	
	Wolf, Hannah	\checkmark	
	Wolf, Jad	Ø	
	, Uncheck to deactivate ad	crual group: 🗹	
	Revert Row	🔒 Save Row	
7		100 ≎	

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 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.

 - d 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 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 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 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 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 indicates that the employee is currently a member of the group. 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

Accrual	Group History	
Accrual Group Default	Effective 11/17/2011 12:00 AM CST	
Cl	ose Edit	

O To make changes to the employee's Accrual Group History, click the Edit button

	Accrual Group History						
Accrual Groups	Accrual Edit Group Benefit/Accrual Association Types						
		Accru	al Group History for Bor	esow, Patty			
	Accrual Group		Starting	Ending			
Default			11/17/2011 12:00 AM	forever	Delete		
	Add New Accrual Group		Starting	Ending			
Defa	ult	0	12/11/2013 03:42 PM		Add		
	Note: A blank ending	ime mear	ns " <i>forever</i> " and will overwrite a	ll memberships after the sta	rting time.		

O To edit the Starting or Ending date, click on the date in the pink section.

 Edit Start Time	
Enter the new time: 11/17/2011 12:00 AM	
OK Cancel	

• Type in a new date and click the **OK** button.

Accrual Group History for Wolf, Jad				
Accrual Group	Starting	Ending		
Add New Accrual Group	Starting	Ending		
Default \$	12/11/2011 03:50 PM		Add	
Note: A blank ending time me	ans " <i>forever</i> " and will overwrite al	memberships after the starting tir	m <mark>e.</mark>	

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.

П

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 modifications of both tenure and general settings.

Division		Existing Accrual Groups
Keeler Co.		Default
General FMLA Sick Vacation		
	Accrual Tenure Leve	
🖶 Starting after 90 days, accr		al. Net hours available may not exceed 250.
	Add Accrual Tenure	e Level (Help
	General Settings for Va	acation Accruals
Accrual Waiting Period:	0 days	Prorate partial periods
Maximum Accrued Hours:	hours	Benefit time used contributes to time worked for accruals
Usage Waiting Period:	days	Hide this benefit type (hidden benefit types can be viewed with appropriate permissions).
Accrual Interval:	Weekly	Starting at Every 1 © Employee's accrual start date
Accrue at beginning of int	erval	O 12/12/2013 10:47 AM
Tenure Starts Relative To:		
Employee's accrual start da	ate	0
	Advanced Options	for Vacation
Enforce Minimum Hours:		Do not use beyond hours
		minimum.
When enforcing a minimum n what action should be taken v the minimum:		llow 🗘
Use benefit time in increment	s: D	isabled Concernents of: 00:00:00
	Periodic Modification Tenur	e Levels for Vacation
	Add Modification T	enure Level
	Periodic Modification Se	ttings for Vacation
Modification Interval:	This accrual group do periodic modifications	
Modify at beginning of int	erval nours.	
		🔊 Revert Row 🛛 🔒 Save Row
		100

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

Division	Existing Accrual Groups
Keeler Co.	Default
General FMLA Sick Vacation	
	Accrual Tenure Levels for Vacation
Starting after 90 days, accrue 2.1	3 hours per accrual interval. Net hours available may not exceed 250.
Tenure Starts After: 90 day(s)	Minimum Time Worked: hours
Tenure Ends Before: 0 week	(s) 🗘 Maximum Single Accrual: hours
Accrual Rate: 2.13 hours	per accrual interval 🗘 Maximum Net Hours Available: 250 hours
Delete Tenure Level	
	Add Accrual Tenure Level (Help)

- 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 Tenure G current. 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
 - Ime-based rates: when the rate is specified number of hours is divided among 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 and the rate of accrual interval. When the rate is 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 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 over the normal elect "hour worked." Note: When using work-based rates, an employee earns benefits at the rate effective at the time worked. The they worked. The true worked is divided among of hours, divide the desired accrual by the number of hours worked to determine the accrual interval. The accrual interval, the accrual will be calculated with the hours worked during each tenure level, using the rate for the tenure level effective at the time of the tenure level effective at the time of the tenure level effective at the time of the tenure level effective at the time of the tenure level effective at the time of the tenure level effective at the time the hours are provided.
 - 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 <u>IPSBEN</u> 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

General Settings for Vacation Accruals			
Accrual Waiting Period:	0 days	Prorate partial periods	
Maximum Accrued Hours:	hours	Benefit time used contributes to time worked for accruals	
Usage Waiting Period:	days	Hide this benefit type (hidden benefit types can be viewed with appropriate permissions).	
Accrual Interval:	Weekly	Starting at Every 1	
□ Accrue at beginning of interval		week(s) date O 12/12/2013 12:56 PM	
Tenure Starts Relative To:			
Employee's accrual start dat	e	•	

- 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 will period waiting period avaiting period entry setting the east of the difference between setting a 30 day waiting period setting are setting the real to a partial period. It is selected. The difference between setting a period waiting period a partial period when using a tonur elevel to start after 30 days is that a 30 day waiting period will prorate the accrual 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 proup. As an example, if vacation accrues yearly on January 1st and an employee who is fined 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 us Prorate Partial use 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 employees 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. 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

Advanced Options for Vacation			
Enforce Minimum Hours:	Do not use beyond Disabled 2 hours minimum.		
When enforcing a minimum number of available hours, what action should be taken when a request would violate the minimum:	Allow C		
Use benefit time in increments:	Disabled Concernments of: 00:00:00		

- 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 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 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 "Beny" 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
 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.

Periodic Modification Tenure Levels for Vacation				
Add Modification Tenure Level				
Periodic Modification Settings for Vacation				
Modification Interval: This accrual group does not have any periodic modifications to Vacation				
□ Modify at beginning of interval hours.				
	🔊 Revert Row	🔒 Save Row		

Click the Add Modification Tenure Level button.

Periodic Modification Tenure Levels for Vacation					
Starting at Employe	Starting at Employee's accrual start date, add 0 hours every modification interval.				
Tenure Starts After: 0	week(s)		Tenure Ends Before:	0 week(s)	0
Modification Type:	Add hours with no maximu	im 🗘	Modification Value:	0 hours	
Processing Order	1 0				
	[Delete Tenure Level			
	Add	Modification Tenure L	evel		

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 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 Work-based tenure is specified by selecting "hour (s) worked" in Work-based tenure is worked.
- 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.

fication Type: This is the action the system will take	a.	
	Periodic Modification Tenur	e Levels for Vacation
	Starting at Employee's accrual start date, remove any hou	rs above 20.0000 hours every modification interval.
	Tenure Starts After: 0 week(s)	Tenure Ends Before:
Remove any hours above the Modification Value.	Modification Type: Remove any hours above Processing Order 1 0	Modification Value: 20.000 hours
	Delete Tenure	Level
	Add Modification Te	
	al time. After the modification, the employee has 20 hours. E hours at the interval time. After the modification, the employee	Employee #2 has 20 hours at the interval time. After the modification e still has 10 hours.
Remove hours (minimum 0) subtracts the Modifie	ation Value from the employees hours, but will not put them	in the negative.
	n Tenure Levels for Vacation	
	20.0000 hours (minimum 0) every modification interval.	
Tenure Starts After: 0 week(s)	Tenure Ends Before: week(s)	
Modification Type: Remove hours (minimum 0)	Modification Value: 20.000 hours	
Processing Order 1 3		
Delet	e Tenure Level	
Add Modif	ication Tenure Level	
	al time. After the modification, the employee has 18 hours. E t the interval time. After the modification, the employee has	Employee #2 has 20 hours at the interval time. After the modificatio 0 hours.
Remove percent of hours with the Modication Val		
Periodic Modificatio	n Tenure Levels for Vacation	
	0	
Tenure Starts After: 0 week(s)	Tenure Ends Before: week(s)	
Modification Type: Remove percent of hours	Modification Value: 50 %	
Processing Order 1 0		
Delet	e Tenure Level	
Add Modif	ication Tenure Level	
	n Tenure Levels for Vacation	the maximum net hours that was set in the accural tenure levels so
Tenure Starts After: 0 week(s)	Tenure Ends Before: week(s)	
Modification Type: Add hours with no maximum	Modification Value: 20 hours	
Processing Order	_	
Delet	e Tenure Level	
Add Modif	ication Tenure Level	
EXAMPLES (with a Maximum Net Hours Available set maximum, but with this modification the maximum hours at the interval time. After the modification, th	is ignored. Employee #2 has 20 hours at the interval time. At	- er the modification, the employee has 58 hours. This exceeds the 50 fter the modification, the employee has 40 hours. Employee #3 has
Add hours up to the maximum accrued hours:	This adds the Modification Value to the employee's balance, b	out will not exceed the defined Maximum Net Hours Available.
	n Tenure Levels for Vacation	
Starting at Employee's accrual start date, add 20 I	0	
Tenure Starts After: 0 week(s)	Tenure Ends Before: week(s)	
Modification Type: Add hours up to the maximum acc	rued hours 💌 Modification Value: 20 hours	
Processing Order 1 2		
Delet	e Tenure Level	
Add Modif	ication Tenure Level	
EXAMPLES (with a Maximum Net Hours Available set	to 40): Employee #1 has 38 hours at the interval time. Afte	er the modification, the employee has 40 hours. Employee #2 has 2 interval time. After the modification, the employee has 30 hours.
	e add or subtract hours from an employee's balance to brin	
	n Tenure Levels for Vacation	
Starting at Employee's accrual start date, set hou		
Tenure Starts After: 0 week(s)	Tenure Ends Before: week(s)	
Modification Type: Set hours to (add/subtract)	Modification Value: 20 hours	
Processing Order 1		
	e Tenure Level	
	ication Tenure Level	

Periodic Modification Tenure Leve	els for Vacation
Starting at Employee's accrual start date, set hours to 20 hours	every modification interval.
Tenure Starts After: 0 week(s)	Tenure Ends Before:
Modification Type: Set hours to (using a reset)	Modification Value: 20 hours
Processing Order	
Delete Tenure Level	
Add Modification Tenure I	Level
EXAMPLES: Employee #1 has 38 hours at the interval time. After t employee still has 20 hours. Employee #3 has 10 hours at the inte Expression: For more complicated types that might have multiple	
ication Value: This value is either a percentage or a specific num	ber of hours which is used in completing the action defined by the modification type.
	Periodic Modification Tenure Levels for Vacation
	Starting at Employee's accrual start date, remove 50.0000% of hours every modification interval. Tenure Starts After:
	Modification Type: Remove percent of hours 🗘 Modification Value: 50.000 %
	Processing Order
essing Order: The order in which the Periodic Modifications occur.	Delete Tenure Level
	Starting at Employee's accrual start date, add 20 hours every modification interval.
	Tenure Starts After: 0 week(s) 0 Tenure Ends Before: 0 week(s) 0
	Modification Type: Add hours up to the maximum accrued hours 🗘 Modification Value: 20 hours
	Processing Order 2 3
	Delete Tenure Level
	Add Modification Tenure Level
	l ployee's time will be reduced by 50% and then 20 hours will be added to it. Employee #1 has 38 hours at the in 19 +20 = 39] IF the order was reversed, Employee #1 would have 20 hours after the modifications. [Math: 38
Modification Settings odification Interval determines the type of frequency for the mo " Defines the number of renetitings of the interval type between m	dification. odifications. For example, select "weekly" and enter "1" to make the modification occur every week.

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.

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 th	ne Set/Ro	eset Recalcu	late icon 🦋 at the top of the page. SetReset Recakulate
	enefit 7	Fotals	
Employee Benefits	Benefit Report	Benefit Log Reporting	
			Select Employees or Groups
			Select employee group [Manage]:
			All Visible Employees In Keeler Co.
			Set Benefit Totals Recalculate Accruals
			Show Inactive Employees

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	 Show released employees Show inactive accrual groups
•	Create a New Accrual Group
	Default Accrual Groups
Division	Existing Accrual Groups
Keeler Co.	Default
∇	100 \$

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



- Select an Employee or Group from the drop down list.
 Click the Submit Query button to view the report.

Date Leaving	Accrual Group	Accrual Associations Date Joined	🔺 Employee
			Backup, Joey
	Default	11/17/2011 12:00 AM CST	Boresow, Patty
	Default	11/17/2011 12:00 AM CST	Keeler, Larry
	Default	01/10/1984 12:00 AM CST	Keeler, Matthew M.
	Default	11/17/2011 12:00 AM CST	Lierz, Ken
	Default	11/17/2011 12:00 AM CST	_ierz, Whitney
	Default	11/17/2011 12:00 AM CST	Tatro, Betty
	Default	11/17/2011 12:00 AM CST	Wolf, Hannah
	Default	11/17/2011 12:00 AM CST	Wolf, Jad
	Default	11/17/2011 12:00 AM CST	Wolf, Hannah Wolf, Jad

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 accruad level is below zero. The Email Automation module (IPSEML) is required.

Using the left pane Main Menu » Administration, click on: Benefits » Benefit Alerts

Benefit Alerts		
±	Create a new benefit alert	
	🔺 Benefit Reminder Name	
	No Results Found	
		100 \$

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.

8	Create a new benefit alert
Alert Name	Benefit Depletion
Run As	🔍 🛛 Keeler, Matthew M. 🔷
Employees	🔍 All Visible Employees In Keeler Co. 🔷
Send Alert To	🔍 All Visible Employees In Keeler Co. 🔷
Description	employee's benefit balance has been depleted in one or more category
Alert On	Benefits below a threshold 📩
Hours Threshold	1
Template	Benefit Depletion
Add Alert	Add Alert

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 End and the second seco

- Choose the employees list this benefit aiert are sent 10.
 Add a detailed descriptionof 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

	Benefit Depletion	
	100)
Click the + (plus) sign to the	he far left of the Benefit Reminder Name.	
click the T (plus) sign to t	Benefit Reminder Name	
	Benefit Depletion	
Alert Name	Benefit Depletion	
Run As	Keeler, Matthew M.	
Employees	All Visible Employees In Keeler Co.	:
Send Alert To	All Visible Employees In Keeler Co.	
Description	employee's benefit balance has been depleted in one or more category	
Alert On	Benefits below a threshold	
Hours Threshold	1	
Template	Benefit Depletion	
Process or Test	Process Alert Process As Te	
	Dele	
Delete		te
Delete	Save R	

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

E-Mail	Templates			
=		Create a new template		
Template Name	2			
Subject				
Body				
Alert Type			Advanced Schedule Alerts	\$
Add Template			Add	Template
		Email Templates		
	🔺 Туре	Email remplates	Name	
	Employee Reminders		Reminder Template	
(Under Day Hours, Use Benefits		nder Day Hours, Use Benefits	
(Under Week Hours, Use Benefits	Ur	ider Week Hours, Use Benefits	
				100 \$

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

	Create a new template
Template Name	Benefit Depletion
Subject	Benefit Depleted
Body	Attention [name] One of your benefits has been depleted. Until more time is accrued, any requests using that benefit type will be denied. Review "My Benefit Requests" in <u>UntelPS</u> and/or see [manager] for more details.
Alert Type	Employee Benefit Alerts 🔹
Add Template	Add 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 manager name [stock'-subject] -- 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

	Email Tem	plates		
🔺 Туре		-	Name	
Employee Benefit /	Alerts		Benefit Depletion	
Template Name			Benefit Depletion	
Subject	Benefit Depleted			
				ii
Body	Attention [name]			
	requests using that I	enefit type will	ted. Until more time is ac be denied. Review "My B anager] for more details.	enefit
Alert Type			Employee Benefit Ale	erts 🗘
Delete				Delete
			🔊 Revert Row	🔒 Save Row
Employee Remin	lers		Reminder Template	
Under Day Hours, Use	Benefits	U	nder Day Hours, Use Bei	nefits
Under Week Hours, Use	e Benefits	Un	der Week Hours, Use Be	enefits
				100 \$
 Click the + (plus) sign to the left of 	f the Alert Type to ex	pand the Email	Templates window.	

ail Templates wind

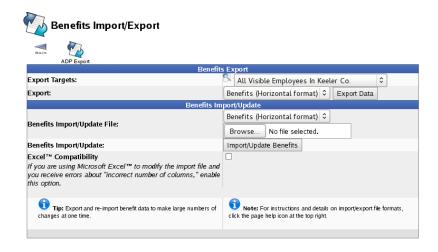
- Make any neccessary changes and then click the Save Row button.
- To delete this template, click the **Delete** button.

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		Av ailable	Effective	
Backup, Joey	1008		0		
Backup, Joey	1008	Vacation	0		
Backup, Joey	1008	FMLA	0		ļ
Boresow, Patty	1005	Sick	229.17		t
Boresow, Patty	1005	Vacation	93.33		
Boresow, Patty	1005	FMLA	0		ļ
Keeler, Larry	1003	Sick	227.17		ł
Keeler, Larry	1003	Vacation	107.33		t
Keeler, Larry	1003	FMLA	0		Ì
Keeler, Matthew M.	1000	Sick	250		ł
Keeler, Matthew M.	1000	Vacation	42.13		t
Keeler, Matthew M.	1000	FMLA	0		ļ
Lierz, Ken	1004	Sick	232.17		ł
Lierz, Ken	1004	Vacation	87.33		
Lierz, Ken	1004	FMLA	0		ļ
Lierz, Whitney	1001	Sick	232.17		t
Lierz, Whitney	1001	Vacation	107.33		
Lierz, Whitney	1001	FMLA	0		ļ
Tatro, Betty	1002	Sick	232.17		t
Tatro, Betty	1002	Vacation	107.33		
Tatro, Betty	1002	FMLA	0		ļ
Wolf, Hannah	1007	Sick	232.17		t
Wolf, Hannah	1007	Vacation	107.33		
Wolf, Hannah	1007	FMLA	0		ļ
Wolf, Jad	1006	Sick	232.17		t
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 <u>OpenOffice.org</u> 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 unque 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

Select either a Horizontal or Verical Format from the Benefits Import/Update File drop down list.
 Click the Browse buttonand select the .csv file with new or updated benefits data.
 Click the Import/Update Benefits button.
 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 it the top of the page. ADP Export

5

ADP Accrual Export		
	ADP Accrual Export	
	t an employee's presets for this page:	
	🥄 Keeler, Matthew M. 🗢	
	No Preset Selected 🗘	
	Save Preset Delete Preset	
User Selection	All Visible Employees In Keeler Co.	2
Data Banas		_
Date Range	Today	2
	12/23/2013 12:00:00 AM 12/24/2013 12:00:00 AM	
Company Code		
File #	Badge #	2
	Dadge #	·
Allowed/Taken Position number for FMLA	Exclude	e
Allowed/Taken Position number for Sick	Exclude	le
Allowed/Taken Position number for Vacation		-
		e
Mode	Adjust Allowed / Do Not Touch Taken 🗘	\$
	Export	t

• 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			anowed reguestione rype	0
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505			3	2.13
505		1	3	2.13
505			3	2.13
505	1008	1	3	C
505	1008	2	3	0

Holidays

The TimeIPS Holidays feature automatically allocates paid holiday hours. The Pavroll Integration with Benefits Tracking module is required.

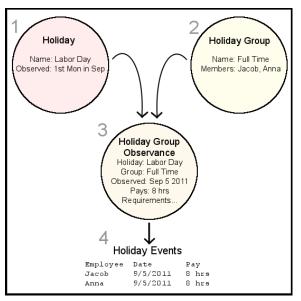
Summary:

- 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.

Holiday	Holiday Group A	Holiday Group B	Holiday Group
New Year's Day	2010 Observance day and rules create "Events" 2011 Observance day Rules For as manyyears as the holiday is observed	2010 Cheservance day Rules 2011 Cheservance day Rules	For as many Holiday Groups as needed to cover the needs of your organization
<u> </u>			
	2010 Observance day and rules create "Events"	2010 Observance day Emp 2 Rules Emp 3	For as many Holiday Groups as needed to cover the needs of your organization
Labor Day	2011 Observance day Rules	2011 Observance day Rules	
	For as many years as the holiday is observed		
As many holidays as r	needed for your organization.		

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.



We define a holiday called Labor Day which occurs on the first Monday of September.
 We have a holiday group called "Full Time" which has two members: Jacob and Anna

- 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 not earned by the rules.

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

14 Holiday Re	porting							
=		View Holida	y Events - Sele	ction Prefere	ences			
Select Date Range			This	s Week				\$
					Fi	rom: 12/23/2013	3 12:00:00 AN	1
						To: 12/30/2013	3 12:00:00 AN	1
Select Employee or G	roup			🔍 🖪 All Vi	isible Empl	oyees In Keele	er Co.	0
Select Holiday Group							All Groups	٥
Select Holiday						All Holiday	/s	\$
			Submit					
			Holiday Event					
▲ Employee	Holiday	Start Time	End Time No Results Four	Duration nd	Earned	Approve	Recalculate	8
\bigtriangledown							100	٥
Ŷ.				Check Earn	ed Status	Reset Events	Create Eve	onts

- 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	DurationEarnedApproveRecalculate
۲	Boresow, Patty	Labor Day		I 09/02/2013 04:00:00 PM	
۲	Boresow, Patty			11/22/2013 04:00:00 PM	
۲	Boresow, Patty	Thanksgiving		11/28/2013 04:00:00 PM	
۲	Keeler, Larry	Labor Day	09/02/2013 08:00:00 AM	I 09/02/2013 04:00:00 PM	1 8hrs 🖋
\oplus	Keeler, Larry	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	1 8hrs 🖋
۲	Keeler, Larry	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	1 8hrs 💜
۲	Keeler, Matthew M.	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PN	1 8hrs 🖋
۲	Keeler, Matthew M.	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	1 8hrs 🖌
	Keeler, Matthew M.	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	1 8hrs 🖌
۲	Lierz, Ken	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PN	1 8hrs 🖋
	Lierz, Ken	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	1 8hrs 💜
۲	Lierz, Ken	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	1 8hrs 💜
۲	Lierz, Whitney	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PN	1 8hrs 🖋
۲	Lierz, Whitney	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	1 8hrs 🖌
۲	Lierz, Whitney	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PN	1 8hrs 🖌
۲	Tatro, Betty	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PN	1 8hrs 🖋
۲	Tatro, Betty	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PN	1 8hrs 🖋
۲	Tatro, Betty	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	1 8hrs 🖋
۲	Wolf, Hannah	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	1 8hrs 🖌
۲	Wolf, Hannah	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	1 8hrs 🖌
۲	Wolf, Hannah	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	1 8hrs 🖌
۲	Wolf, Jad	Labor Day	09/02/2013 08:00:00 AM	09/02/2013 04:00:00 PM	1 8hrs 🖌
۲	Wolf, Jad	Day After Thanksgiving	11/22/2013 08:00:00 AM	11/22/2013 04:00:00 PM	1 8hrs 🖌
٠	Wolf, Jad	Thanksgiving	11/28/2013 08:00:00 AM	11/28/2013 04:00:00 PM	1 8hrs 🖌
					100 0
	7				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.

2

- 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.

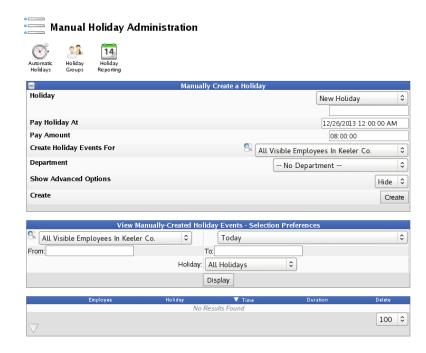
WARNING: Re-enabling the option runs the risk of your changes being overwritten by the system.

• 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.

	Manually Create a Holiday
Holiday	New Holiday 🗘
	Christmas Eve
Pay Holiday At	12/24/2013 12:00:00 AM
Pay Amount	00:04:00
Create Holiday Events For	🔍 All Visible Employees In Keeler Co. 🔷
Department	No Department 🗘
Show Advanced Options	Show 🝷
Holiday Time Reduces OT/DT/PT	Count
Work Pay Type	Standardtime 💌
Work Pay: Hourly Rate	
Work Pay: Differential	
Work Pay: Percentage Multiplier	
Create	Create

• 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.

- O 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.
- o 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...

View Manual	ly-Created Holida	ay Events - Selection Preferences
🔍 All Visible Employees In Keeler Co.	0	This Year 😂
From: 01/01/2013 12:00:00 AM	То	01/01/2014 12:00:00 AM
	Holiday: A	ll Holidays
	D	isplay

- 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.

 - O 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.
 O 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.

	Employee	Holiday	▼ Time	Duration	Delete
۲	Keeler, Matthew M.	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۲	Lierz, Whitney	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۲	Tatro, Betty	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۲	Keeler, Larry	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۲	Lierz, Ken	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۲	Boresow, Patty	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۰	Wolf, Jad	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۲	Wolf, Hannah	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
۰	Backup, Joey	Christmas Eve Manually Created Event	12/24/2013 12:00:00 AM	0hrs, 4min	×
				10	00 0
\sim					

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.

Employee	Holiday		V Time	Duration	Delete
Keeler, Matthew M.	Christmas Eve Manually Created Event	1	2/24/2013 12:00:00 AM	4hrs	×
	This is a manually crea	ated eve	ent		
This event	was last modified by Keeler, Matthew	w M. on	12/26/2013 at 03:18:13 PM		
Paid Time			From: 12/24/2013		
			To: 12/24/2013	04:00:00 A	4
Work Pay Type			D	efault	0
Work Pay: Hourly Rate					
Work Pay: Differential					
Work Pay: Percentage Mult	iplier				
Paid Time Counts Towards	Overtime				ount
Department			No Department		0
			Revert Row	🔒 Save I	Row

• 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.

🔊 · Al	Itomatic Holiday Administration
Generation Overview	Holiday Groups Reporting
different s	There are no Holiday Groups configured. c Holidays use groups of employees to apply individual Holiday Observances. This allows you to have sets of employees observe the same holiday differently. For example, your senior managers may earn 8 soliday pay, while your new interns might only be elidgible for 4. Click this link to set up a new Holiday Group and add all employees into it.
Ð	Create a new Holiday
	Holidays Name
	Day After Thanksgiving
	Independence Day
	Labor Day
	Memorial Day
	New Year's Day
	Thanksgiving
	100 🔻

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.

Create	a new Holiday
Holiday Name	Summer's Start
Holiday Paycode	SUMSOL
Holiday Worked Paycode	SUMSOLwk
Observance Type	Automatic 💌
Observed By	Calendar Date ≎
Calendar Date	06/21/2013
Common Holidays	Show -
Select from the following	Christmas Eve Christmas Eve Christmas I Christmas I Independence Day (Canada) Independence Day (U.S.A.) Labor Day Charlos Cabornial Day Charlos Cabornial Day Charlos Cabornia Charlos Charlos Cabornia Charlos Ca
Add Holiday	Add Holiday

- 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.
 Holiday Worked Paycode: A custom code that can be used for identifying worked time payroll events for this holiday.
 Holiday Worked Paycode: A custom code that can be used for identifying worked time payroll events for this holiday.
 Holiday Worked Paycode: A custom code that can be used for identifying worked time payroll events for this holiday.
 Holiday Bervance 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 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 Calendar Date to a rule, like "The fourth Thursday of November."
 Calendar Date: The exact calendar date of the year that this holiday is observed.
- 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.

	Holidays
	A Name
	Christmas Eve
	Day After Thanksgiving
۲	Independence Day
	Labor Day
	Memorial Day
	New Year's Day
	Summer's Start
	Thanksgiving
	100 🗘

• Click the + (plus) sign to the left of the Holiday Name to expand the window.

Holiday Details tab

		Holidays	lame				
۲							
		Day After T					
		Independ					
		Labo					
		Memor					
		New Yea					
-		Summe	r's Start				
Holiday Details	Yearly Observance Dates	Per-Holiday Generation Settings	Yearly Per-Group Details				
Delete this	Holiday				Delete		
Holiday Na	me			Sun	Summer's Start		
Holiday Pa	ycode			SUM	SUMSOL		
Holiday Wo	rked Paycode			SUM	SUMSOLwk		
Observance	е Туре				Auto	matic	٥
Observed E	βγ				Caler	ndar Date	0
Calendar D	Calendar Date						
	5						āb
		Thanks	sgiving				
						100) ¢

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.

	Holidays		
	🔺 Name		
	Christmas Eve		
	Day After Thanksgiving		
-	Independence Day		
	Labor Day		
	Memorial Day		
+	New Year's Day		
	Summer's Start		
Holiday Deta	is Yearly Observance Dates Per-Holiday Generation Settings Yearly Per-Group D	etails	
			Add Next Observance
14 Sat	urday, the 21st of June, 2014 (06/21/2014)	×	View All Events
۲	Thanksgiving		
			100

Per-Holiday Generation Settings tab

		Holidays	Name			
•	Christmas Eve					
•			hanksgiving			
•			lence Day			
			or Day			
*			rial Day			
+			ar's Day			
8		Summe	er's Start			
lolidav Details	Yearly Observance Dates	Per-Holiday Generation Settings	Yearly Per-Group Detai	ls		
		oliday does not yet have a				
	ns provided below have	oliday does not yet have a been copied from your defa settings instead of the defa	ult settings. If you mo		em, Holiday	
Event ger	ns provided below have	been copied from your defai	ult settings. If you mo	odify or save the	em, Holiday • Not Create 🗘	
Event ger	ns provided below have neration will follow these	been copied from your defai	ult settings. If you mo	odify or save the	Not Create	
Event ger	ns provided below have neration will follow these	been copied from your defa settings instead of the defa	ult settings. If you mo	odify or save the	Not Create 🗘	

Create Generation Settings: To create specific settings, set this option to "Create" and fill out the settings form.

	Summe	rs Start			
Holiday Details Yearly Obs	servance Dates Per-Holiday Generation Settings	Yearly Per-Group Details			
	This Holiday does not yet have ar d below have been copied from your defau ill follow these settings instead of the defau	It settings. If you modify or save them, Holiday			
Create Generation Se	ettings	Create			
Automatically Genera	ate Events	✓ Automatic			
Paid Start Time		08:00:00 AM			
Paid Duration		08:00:00			
Department		No Department			
Offset Observance	If the observance falls on Sunday, obs	erve it instead on: Monday (1 day after)			
	If the observance falls on Monday, obs	erve it instead on: No Change (Monday)			
	If the observance falls on Tuesday, obs	erve it instead on: No Change (Tuesday)			
	If the observance falls on Wednesday, o	bserve it instead on: No Change (Wednesday)			
	If the observance falls on Thursday, ob	serve it instead on: No Change (Thursday)			
	If the observance falls on Friday, observe it instead on: No Change (Friday)				
	If the observance falls on Saturday, obs	erve it instead on: Friday (1 day before)			
Paid Duration Modifi	er	None (Use duration above)			
Paid Duration Reduc	tion	Reduce Paid Tim			
Start of OT/DT Obser	vance	08:00:00			
Duration of OT/DT O	bservance	24:00:00			
Waiting Period: Days	Since Hired	90			
Waiting Period: Requ	iire Days And/Or Worked Hours	And			
Waiting Period: Hour	's Worked	0			
Adjacent Day Before		None Required			
Adjacent Day And/Or		And			
Adjacent Day After		None Required			
Adjacent Day Worked	i Hours	08:00:00			
Count Towards Accru	uals	Does Not Count			
Holiday Time Reduce	es OT/DT/PT	Does Not Count			
, Additional OT/DT/PT		00:00:00			
Work Pay Type		Default			
Work Pay Type Time	Cap	00:00:00			
	Reduces Daily/Weekly OT/DT/PT Requi				
Work Pay: Hourly Ra		INO			
Work Pay: Differentia					
Work Pay: Percentag					

• 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
- 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 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

				Day A	fter Thanks givin		Christmas Eve							
•) •)					Day After Thanksgiving									
)				Ind	ependence Day									
					Labor Day									
					/lemorial Day									
9					ew Year's Day									
				S	ummer's Start									
iday Details 👌	early Obs	ervance Date:	s Per-Holiday	y Generation Se	ettings Yearly Per-(Group Details								
On this nan		an configure	holiday dat	tos and sottir	igs for each Holi	day Group f	or each vear							
On this part	ier you ee	an configure	monucy dea	es and setti	gs for each fion	ady Group is	or each year							
All Holidays S	settings O	bservances												
							Append Ne	w Observance						
		Observed	On	·	Paid On	Paid Durat	ion							
	+) 12	2:00 AM 06/	20/2014	08:00 A	M 06/20/2014	8hrs	Viev	w Events X						
								100 0						
	7							100 -						
	\vee													
							Revert Tab	Save Tab						
						-,,	revert lab	ave lab						
				-	"hanksgiving									
)					nanksylving									

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. ------

fault Generation Settings Holida		
This page lists the so	urces for settings used to create holiday events.	
	Christmas Fue	All Holidays
	Christmas Eve	Default
	Day After Thanksgiving	Default Default
	Day After Thanksgiving Independence Day	Default Default Default
	Day After Thanksgiving Independence Day Labor Day	Default Default Default Default
	Day After Thanksgiving Independence Day Labor Day Memorial Day	Default Default Default Default Default
	Day After Thanksgiving Independence Day Labor Day	Default Default Default Default

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

ault Generation Settings Holidays	22 Holiday Groups	14 Holiday Reporting	
his page lists the sourc	es for settin	gs used to create holiday events.	
			All Holidays
		tmas Eve	Default
		Thanksgiving	Default
		ndence Day	Default Default
		bor Day norial Day	Default
		Year's Dav	Default
		mer's Start	Holiday
		nksaiving	Default
) Default Holi	· ·	eration Settings	
omatic Generation Ho	iday Holi	4 Jay	
omatic Generation Ho	A 1	4 Jay	on Settings
These are global setting These are global setting These settings will be u Holiday itself. When the Holiday Engli will be created following the links below. It Day When the Holiday Engli	A graph of the set of	Default Holiday Generati Default Holiday Generati on does not yet have any globa applied to Holiday Events when th no setting configured for the Holida' no setting configured for the Holida' for employees in Holiday Grou configured on this panel. Optionally not necessary to configure setti Day - (Optional) Click here to config e Day - (Optional) Click here to config ay - (Optional) Click here to config ogay - (Optional) Click here to config ing - (Optional) Click here to config ing - (Optional) Click here to config signing - (Optional) Click here to config signi	I holiday settings configured. I holiday Event Generator automatically creates them. ay Group, and if there is also no setting configured for the ave default settings. ups that do not have default settings, the Holiday Events y, you can configure settings for these Holidays by clicking ings for these holiday. nfigure settings for this Holiday. Stringure settings f

• 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.

Create Generation Settings			Create	•
Automatically Generate Eve	nts		💌 A	utomation
Paid Start Time			08:00:00 AM	
Paid Duration			08:00:00	
Department		No Departr	nent	-
Offset Observance	If the observance falls on Sunday, observe it in	stead on: Mon	day (1 day after)	
	If the observance falls on Monday, observe it in	nstead on: No C	hange (Monday)	
	If the observance falls on Tuesday, observe it in	nstead on: No C	hange (Tuesday)	1
	If the observance falls on Wednesday, observe it	t instead on: No	Change (Wedne	sday)
	If the observance falls on Thursday, observe it	instead on: No	Change (Thursda	iy)
	If the observance falls on Friday , observe it ir	nstead on: No C	hange (Friday)	
	If the observance falls on Saturday , observe it in	nstead on: Frida	y (1 day before)	
Paid Duration Modifier		None (Use	duration above)	
Paid Duration Reduction			Reduce	Paid Time
Start of OT/DT Observance			08:00:00	
Duration of OT/DT Observar	ice		24:00:00	
Waiting Period: Days Since			90	
Waiting Period: Require Day	's And/Or Worked Hours			And
Waiting Period: Hours Work	ed		0	
Adjacent Day Before		Nor	ne Required	
Adjacent Day And/Or				And
Adjacent Day After		Nor	ne Required	-
Adjacent Day Worked Hours			08:00:00	
Count Towards Accruals			Does Not	Count
Holiday Time Reduces OT/D	от/РТ		Does Not	Count
Additional OT/DT/PT Reduc	tion		00:00:00	
Work Pay Type			Default	
Work Pay Type Time Cap			00:00:00	
Work Time OT/DT/PT Reduc	es Daily/Weekly OT/DT/PT Requirement			No
Work Pay: Hourly Rate				
Work Pay: Differential				
Work Pay: Percentage Multi	plier			
				Submit

• 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.

 - O Prorate 40H vs Sch Weekly Hours: Grants a percent of the holiday pay duration set above.
 O 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.
 In/Out Schedule Time: Grants 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 he case of weekend holidays. If the following day is configured as a Holiday, the day after it will be used, and so o
- 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

🥦 Holiday Groups								
Automatic. Holidays	Generation Overview	14 Holiday Reporting						
			Create a nev	w Holiday g	roup			
						Show Inacti	ve Holiday Gro	oups
				/ Groups				
		🔺 Group Nai			Description		Active	
		All Holiday	s				Active	
							100	0

CREATE A NEW HOLIDAY GROUP

• Click the + (plus) sign to the left of the Create a new Holiday group bar to expand the window.

Create a new Holiday group			
Holiday Group Name	Part-timers		
Description	All Part Time employees belong to the group.		
Add all ungrouped employees to this group.	Add Ungrouped Employees		
(Optional) Default Settings	Configure 💌		
(Optional) Department	No Department 😂		
(Optional) Automatically Generate Events	✓ Automation		
(Optional) Observance Time	08:00:00 AM		
(Optional) Paid Duration	4:00:00		
(Optional) Waiting Period (Days Since Hired)	90		
(Optional) And/Or	And 🗘		
(Optional) Waiting Period (Hours Worked)	0		
(Optional) Adjacent Day Before	Require Scheduled Day		
(Optional) Adjacent Day After	Require Scheduled Day		
(Optional) Adjacent Day Worked Hours	4:00:00		
Add Group			

• 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
- O 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.
 O 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.

			Show Inactive Ho	liday Groups		
		Holiday Groups				
🔺 Group Name		Description		Active		
Part-timers		All Part Time employees belong to t	nis group.	Active		
General Per-Group Generation S	ettings Employees					
Group Name			Part-timers			
Group Description			All Part Time employees belo group.	ong to this		
Active Active 🗘						
			🥱 Revert Row 🛛 🔚	Save Row		
				100 \$		

• 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.

🔺 Group Name	Holiday Groups			Acti	ve
Part-timers	All Part Time employees belon	g to this group		Acti	
Seneral Per-Group Generation					
Automatically Generate E	vens			💌 Automa	tior
Paid Start Time			08:00:00 A	М	
Paid Duration			04:00:00		
Department		No Depa	rtment		\$
Offset Observance	If the observance falls on Sunday, observe it	instead on: M	1onday (1 day	after)	0
	If the observance falls on Monday, observe it	instead on: N	o Change (Mo	onday)	\$
	If the observance falls on Tuesday, observe it	instead on: N	o Change (Tu	esday)	0
	If the observance falls on Wednesday, observe	it instead on:	No Change (Wednesday)	0
	If the observance falls on Thursday, observe i	t instead on:	No Change (T	hursdav)	0
	If the observance falls on Friday, observe it	_		1.	0
	If the observance falls on Saturday, observe it				0
Paid Duration Modifier	n nie observance nans on Sauraaj, observe n				0
Paid Duration Reduction		None (C	lse duration al		
				educe Paid T	im
Start of OT/DT Observan			08:00:00		
Duration of OT/DT Obser			24:00:00		
Waiting Period: Days Sin			90		
	Days And/Or Worked Hours			And	
Waiting Period: Hours W	orked		0		
Adjacent Day Before		(Require Sched	uled Day	0
Adjacent Day And/Or				And	
Adjacent Day After		6	Require Sched	uled Dav	0
Adjacent Day Worked Ho	urs	L	04:00:00	uted Day	
Count Towards Accruals	ur5			NIC	
	T/DT/DT		_	s Not Count	-
Holiday Time Reduces O	וועוויד		Doe	s Not Count	: 0
Additional OT/DT/PT Rec	luction		00:00:00		
Work Pay Type			D	efault	0
Work Pay Type Time Cap	,		00:00:00		
Work Time OT/DT/PT Re	duces Daily/Weekly OT/DT/PT Requirement			No	0
Work Pay: Hourly Rate					
Work Pay: Differential					
Work Pay: Percentage M	ultiplier				
Delete Setting				Del	ete
		5	Revert Row	Save R	ow
				all Daven	

• 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.

uration: 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.

- Once: This option infolines the selected normaly pay duration in the or norm 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.
 In/Out Schedule Time: Grants the employee 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.
- 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 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.

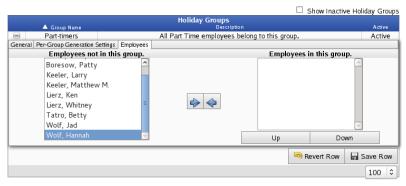
- Count Towards Accruals: Set to "Counts" if the Holiday Pay Hours time for this holiday should be used to count as worked time for benefit accrual calculations. Note: Holidays always count toward benefit tenure level calculations.
- Holiday Time Reduces OT/DT/PT: Select "Counts" if, in accordance with 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 42).

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

🥭 Job Administration								
Print		Job Work						
Barco de Labels	Categories Cu:	stomers Orders						
_								
			Add New	Jobs				
			Display O	ptions				
			Search O	ptions				
	▲ Category	Job Name	Job Code	GL Number	Manager			
±	Empty	paint	33	Empty	Keeler, Matthew M.			
(±)	Empty	sheet rock	44	Empty	Keeler, Matthew M.			
H	Empty	flooring	55	Empty	Keeler, Matthew M.			
					100 \$			
					100 +			

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 <u>Job Categories</u> and <u>Job Customers</u> first.

		Add New Jobs		
ob Name:	paint	Small Display Name:	paint	
Category:	No Category 🗘	Manager:	Keeler, Matthew M.	0
Job Code:	33	Copy From:	(Create New)	0
Description:				
		Create Job		
		Create Job		

- 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 <u>Job Categories</u> 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 elit 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.

	Category	Job Name	Job Code	GL Number	Mana	iger
	Empty	paint	33	Empty	Keeler, Ma	itthew M.
[General	Division: Keeler Co.				
- 1	Billing	Job		Small Display		
- [Pay Rates	Name: paint		Small Display	paint	
- 1	Override Rates				(
- 1	Coverage	Category: No Cat	egory	Manager:	Keeler, Matthew	M. 🗘
- 0	Default Membership	Job				
- 1	Membership	Code: 33				
- 1	Membership Restrictions				This Job is active	
- 1	Clocked In	Description:				
- 1	Allocations	Description.				n clock into this
	Modifications				job	
- 1	Tracking Fields					
- 1						
- 1						
l						Print Barcode
					🔊 Revert Row	🔒 Save Row
	Empty	sheet rock	44	Empty	Keeler, Ma	tthew M.
\bigtriangledown						100 \$

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

	🔺 Category	Job Nam	1e Job Co	ode GLNumber	Manager
	Empty	paint	33	Empty	Keeler, Matthew M.
	General	Control			
- 1	Billing	Number:		GL Nu	mber:
	Pay Rates	Subcode 🗖		Alterna	ate
	Override Rates	Number:		Numbe	er:
	Coverage	Billing			
	Default Membership	Rate:		Custo	mer: No Customer 🗘
	Membership	i care.			
	Membership Restrictions				I
	Clocked In				I
	Allocations				I
	Modifications				I
- 1	Tracking Fields				I
					🔊 Revert Row 🛛 📙 Save Row
۰	Empty	sheet ro	ock 44	Empty	Keeler, Matthew M.
∇					100 \$

- 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 <u>Job Customers</u> 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.

🔺 Category	Job I	Name _	Job Code	GL Number		Mana	ger
Empty	pa	int	33	Empty		Keeler, Ma	tthew M.
General Billing	Hourly Rate	Hourly Differential	Rate Multiplier	Pay Type	Counts OT	Effectiv	e
Pay Rates Override Rates	15	2	10 %	Star •	Def 🗘	01/06/2014 01:	03:07 P Add
Coverage Default Members hip	_					V	iew Audit History
Membership Membership Restriction Clocked In	5						
Allocations	_						
Tracking Fields	_						
						🤊 Revert Row	🔒 Save Row
Empty	sheet	rock	44	Empty		Keeler, Ma	tthew M.
\bigtriangledown							100 \$

To add a job Pay Rate:

- add a job ray rate:
 O 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

 - 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.

- Category	101	o Name	Job Code	GL NUMDER		manager		
Empty	p	aint	33	Empty		Keeler, Mat	thew M.	
General Billing	Hourly Rate	Hourly Differential	Rate Multiplier	Рау Туре	Counts OT	Effective	e	
Pay Rates Override Rates			%	Default 🗘	Def ≎	01/06/2014 04:0	02:31 PM	Add
Coverage Default Members hip	15			Standardtime	Default	01/06/2014 04:02		Edit
Membership Membership Restrictions	-					Vi	ew Audit	History
Clocked In Allocations								- 1
Modifications	-							- 1
Tracking Fields	-							
						🥱 Revert Row	🔒 Sav	e Row

• 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.

	Category	Job Name	Job Co	de (GL Number		Manager	
	Empty	paint	33		Empty	Ke	eler, Matthew	/ M.
[General			Edi	t Job Rate			
- 1	Billing	U.S. A. B. A.			5			
- 1	Pay Rates	Hourly Rate:		15.00				
- 6	Override Rates	Hourly Differential:						
- 1	Coverage	Contra Adulated to a						%
- 1	Default Membership	Rate Multiplier:						70
- 1	Membership	Pay Type:		Standard	time			0
- 1	Members hip Restrictions	i ay iype.		Standarda	cirric			
- 1	Clocked In	Counts OT:		Default				٥
- 1	Allocations							
- 1	Modifications	Effective:		01/06/2014	04:02:31 PM	N		
ł	Tracking Fields	Expires:						
			Sa	ave Changes	5 Delete	Cancel		
l							View A	udit History
						Seve	ert Row	Save Row

• To see a list of all the changes that have been made to pay rates, click the **View Audit History** button.

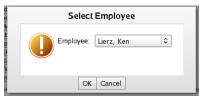
	Job Pay History Audit Log	
	Jan 06, 2014 at Keeler, Matthew M. deleted an existing job pay rate for job "paint". The following 4:59:09 PM information is from the deleted record. Hourly Rate: "15.00", Pay Type: CST "Standardtime", Effective Date: "Jan 06, 2014 at 4:02:31 PM CST". Jan 06, 2014 at Keeler, Matthew M. added a new job pay rate for job "paint". The following 4:50:44 PM information was created for the record. Hourly Rate: "15", Pay Type: "Standardtime", Effective Date: "Jan 06, 2014 at 4:02:31 PM CST".	
	Close	

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.

Category	Job Name	Job Code	GL N	umber	Man	ager
Empty	paint	33	En	npty	Keeler, M	atthew M.
General	Name	Curre	nt Rate	Pay Type	Counts OT	Action
Billing						
Pay Rates				Viev	Audit History	Add Employee Rat
Override Rates						
Coverage						
Default Membership						
Membership						
Membership Restrictions						
Clocked In						
Allocations						
Modifications						
Tracking Fields						
					🥱 Revert Row	ave Row

• 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.

Category	Job N	ame _	Job Code	GLN	umber		Manager		
Empty	pair	nt	33	Er	npty		Keeler, N	latthew M.	
General	N	ame	Curren	t Rate	Pa	/ Туре	e Counts OT Act		n
Billing	liana Kan						Defeult	Class	
Pay Rates	Lierz, Ken		Defa	aunt		Default	Default	Close	2
Override Rates	Hourly	Hourly	Rate	F	'ay	Counts	Effect	ivo	
Coverage	Rate	Differential	Multipl	ier T	ype	OT	Lilect	ve	
Default Membership	10	1	10			[nda]	of use is of a s	1.11.24.0	
Membership	16	1	15	% <mark>S</mark> 1	ar 🔻	Def ≎	01/06/2014 0	1:11:34 P	Add
Membership Restrictions							Employee R		Unterne
Clocked In							Employee R	ale Audit F	listory
Allocations									
Modifications									
Tracking Fields									
					_		~		
							Revert Row	Sav	e Row

- 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), 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.

	Category	Job	Name	Job Code	GL Number		Mana	ıger
	Empty	pa	aint	33	Empty		Keeler, Ma	atthew M.
	General		Name	Currer	it Rate Pa	у Туре	Counts OT	Action
	Billing	Liorz Kon		Default		Default	Default	Close
	Pay Rates	Lierz, Ken		Der	aun	Delault	Delauli	Close
	Override Rates	Hourly	Hourly	Rate	Pay Type	Counts	Effectiv	<i>(</i> 0
	Coverage	Rate	Differential	Multiplier	ray type	OT	Enecuv	
	Default Membership				Decul		01 10 5 10 01 4 01	11.24.0
	Membership			%	Default ≎	De ≎	01/06/2014 01:	:11:34 P Add
N	Membership Restrictions	16	1	15%	Standardtime	Default	01/06/2014 01:1	1:34 PM Edit
	Clocked In							
	Allocations						Employee Ra	te Audit History
	Modifications							
	Tracking Fields							
							Revert Row	🔒 Save Row

• 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

🔺 Category	Job Name	Job Code	GL Number	Man	iger
Empty	paint	33	Empty	Keeler, Ma	atthew M.
General	Name	Current	Rate Pay Ty	pe Counts OT	Action
Billing			1.00)		
Pay Rates	Lierz, Ken	(10.00 +	1.00) x 15% Standar	dtime Default	Back
Override Rates					
Coverage		Ed	lit Employee Ra	te	
Default Membership	Hourly Rate:	16.00)		
Members hip	1 '				
Membership Restrictions	Hourly Differential:	1.00			
Clocked In	Rate Multiplier:	15			%
Allocations	i and i family have				
Modifications	Pay Type:	Star	dardtime		0
Tracking Fields					
	Counts OT:	Defa	ault		0
	Effective:	01/06	/2014 01:11:34 PI	м	
	Expires:				
		Save Cha	anges Delete	Cancel	
				🔊 Revert Row	🔒 Save Row

	▲ Category	Job	Name	Job Code	GL Numb	er	Manager		
	Empty	p	aint	33	Empty		Keeler, Ma	tthew M.	
[General		Name	Curren	t Rate P	ay Type	Counts OT	Actio	n
	Billing	Lierz, Ken		Default		Default			
- 1	Pay Rates	Lierz, Ken		Der	aunt	Default	Default	Close	2
- [Override Rates	Hourly	Hourly	Rate	Pay Type	Counts	Effectiv	0	
- 1	Coverage	Rate	Differential	Multiplier	ray type	от	Enecuv	ie i	
- 0	Default Membership				Default \$	Del≎	01 (05 (0.01 4.01	11.24.0	
- 1	Membership			%	Derault ~	Dev	01/06/2014 01:	11:34 P	Add
- [Membership Restrictions	16	1	15%	Standardtim	e Default	01/06/2014 01:1	1:34 PM	Edit
- 1	Clocked In								
- [Allocations						Employee Ra	te Audit H	listory
- 1	Modifications								
- [Tracking Fields								
						l	Revert Row	🔒 Sav	e Row



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.

	🔺 Category	Job Name		Job Code		GL Number			Mana	ger	
	Empty	paint		33		Empty		к	eeler, Ma	tthew	/ M.
	General	Starti	ng		End	ing		Cov	erage		
	Billing	Day	Time	Da	v	Time	Mi	nimum	Maxim	ստ	Actions
	Pay Rates	Duy		Du	,				Philaini		
- 6	Override Rates										Add New
- F	Coverage	Coverag	e Grace 🗆								
- 6	Default Membership		e Grace 2 Period: 2	minute	s						
- 0	Membership	Employee Alert									mail Alerts
- 6	Membership Restrictions	Employee Alen	E-mail.						_ 🖻 Se	na E-I	mail Alerts
- 6	Clocked In	Alert Te	mplate: I	Jse default	t temi	olate 🗘					
	Allocations				_						
	Modifications								View V	Violati	ion History
- 6	Tracking Fields										
								🤄 Reve	ert Row		Save Row

To add a new coverage rule, click the Add New button.

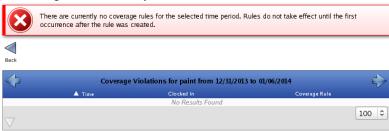
Category	Job Name	Job Code		GL Number		Manager	
Empty	paint	33		Empty	Kee	eler, Matth	ew M.
General	Starting		E	Inding	Cove	erage	
Billing	Day	Time	Day	Time	Minimum	Maximur	n Actions
Pay Rates	<u> </u>					Pitta	
Override Rates	Monday 🔹 🛛	8:00 AM M	onday	 05:00 PM 	0		Delete
Coverage							Add New
Default Membership							Add New
Membership	Coverage G	race min	utes				
Membership Restrictions	Per	iod: 🖆 📶	lutes				
Clocked In	Employee Alert E-m	nail:				Send	E-mail Alerts
Allocations						_ Dena	
Modifications	Alert Templa	ate: Use def	ault ten	nplate 🗘			
Tracking Fields						Minuellin	lation Llistons
						view vio	lation History
					🔊 Rever	t Row	Save Row

- 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.

	Category	Job Name	Job Code	GL Number	Mana	iger
	Empty	paint	33	Empty	Keeler, Ma	itthew M.
[General					
	Billing	The employees listed	I here have the J	ob paint listed as	their Default Job.	
	Pay Rates		Boresow, Pat	tv	~	
	Override Rates			c y		
	Coverage		Tatro, Betty			
- L	Default Membership					
1	Membership					
1	Membership Restrictions					
1	Clocked In					
- L	Allocations					
- L	Modifications					
- L	Tracking Fields				~	
		C	hange the Defaul	t Job of the selec	ted employees to:	
			No Defau	t 🗘 Change	Default Job	
					Revert Row	🔒 Save Row

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 >> Employeent 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.

🔺 Category	Job Name	Job Code		GL Number		Manager	
Empty	paint	33		Empty		Keeler, Matthew	v M.
General	Other Emp	oloyees			E	mployees In This J	ob
Billing	Backup, Joey		\frown				~
Pay Rates	Boresow, Patty						
Override Rates							
Coverage	Keeler, Larry						
Default Membership	Keeler, Matthew M.		=	AA			
Membership	Lierz, Ken						
Membership Restrictions	Lierz, Whitney						
Clocked In	Tatro, Betty						
Allocations	. ,						
Modifications	Wolf, Hannah		¥				~
Tracking Fields							
						🔊 Revert Row	ave Row

• 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.

	Job Name	Job Code	GL Number	Manager					
Empty	paint	33	Empty	Keeler, Matthew M.					
General	Job Restrictions		No Restrictio	on O					
Billing	-		NO RESULCI	v					
Pay Rates	restricting a Job, only certain employees will be able to clock in to that job.								
Override Rates									
Coverage	 No Restriction 								
Default Membership		 Restrict to Members and Default Members: Employees on the Membership tab and 							
Membership	Employees that	have this job co	nfigured as their	Default Job will be able to clock in to this					
Membership Restrictions	job.								
Clocked In				d on the Membership tab will be able to					
Allocations				configured as their default job, but are					
Modifications	not members, wi	ll not be able to	clock in to this jo	b.					
Tracking Fields									
				Revert Row 🔲 Save Row					

- 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.

🔺 Ca	tegory	Job Name	Job Code	GL Number	Man	ager
E Em	pty	paint	33	Empty	Keeler, Ma	atthew M.
Gener	ral					
Billin	g	Emplo	yees of this Jo	b that are curren	tly not clocked in to i	t.
Pay Ra	ite s	Boresow, Patty		Tatro, Betty	Keeler, L	arry
Override	Rates	Wolf, Hannah		,,		
Covera	1ge 🛛	woii, Haiman				
Default Merr	nbership				View	Violation History
Member	rs hip					
Membership R	estrictions					
Clocker	din					
Allocati	ons					
Modificat	tions					
Tracking	Fields					
					Revert Row	🖬 Save Row

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.

	🔺 Category	Job Name	Job Code	GL Number	Mana	iger
	Empty	paint	33	Empty	Keeler, Ma	itthew M.
	General					Add Allocation
	Billing					Add Allocation
	Pay Rates		There are	currently no alloc	ations to view	
	Override Rates					
	Coverage					
	Default Membership					
	Membership					
Me	mbership Restrictions					
	Clocked In					
	Allocations					
	Modifications					
	Tracking Fields					
_					Severt Row	Save Row

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.

	🔺 Category	Job Name	Job Code	GL Number	Mana	ger
	Empty	paint	33	Empty	Keeler, Ma	tthew M.
	General				[Add Allocation
	Billing				l	Add Allocation
- 0	Pay Rates	Code	Amou	nt	Note	
- 0	Override Rates	Grant-revitalize	30		revitalize downtow	vn 🗙
- 6	Coverage					
- 6	Default Membership	Grant-historic	50		historic district	×
- 6	Membership					
- 6	Members hip Restrictions					
- 6	Clocked In					
- 0	Allocations					
- 0	Modifications					
	Tracking Fields					
١,						
					🔊 Revert Row	ave Row

Modifications Tab

From the Modifications tab, you can set up job reassignment and a mininum job time.

	Category	Job Name	Job Code	GL Number	Manager
	Empty	paint	33	Empty	Keeler, Matthew M.
	General	Job Reassignment			Select no employees. 🗘
- 1	Billing				select no employees.
	Pay Rates	Minimum Job Time			01:00:00
- 1	Override Rates				
- [Coverage				
- 0	Default Membership				
- 0	Membership				
- 0	Membership Restrictions				
- 0	Clocked In				
- 0	Allocations				
10	Modifications				
	Tracking Fields				
					🔊 Revert Row 🛛 🔒 Save Row
	Job Reassignment		uned to an emr	lovee all time w	orked by any employee on that iob will

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.

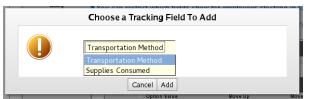
Tracking Fields Tab

Tracking fields allow employees to provide additional information when clocking in or out.

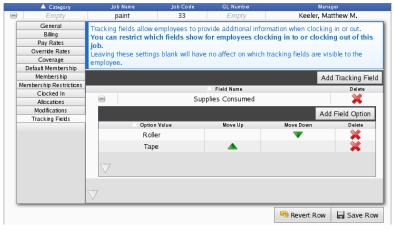


Leaving these settings blank will have no affect on which tracking fields are visible to the employee, but by adding tracking fields here, you are restricting which fields show for employees clocking in to or clocking out of this job.

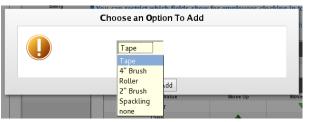
• To add, click the Add Tracking Field button.



• 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.

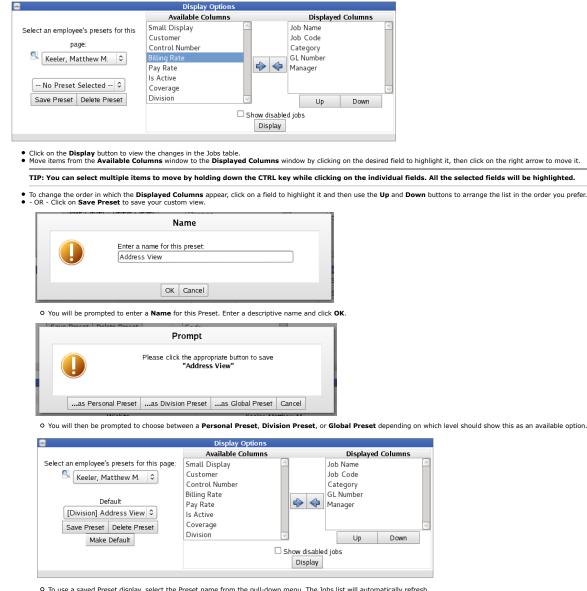


• Click on the Field Option to view the full list of options and select the one you wish to add, then click the Add button.

DISPLAY OPTIONS

Display Options allow you to customize the Jobs table.

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



O To use a saved Preset display, select the Preset name from the pull-down menu. The Jobs list will automatically refresh.
 O 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.

	Search Options					
	alue in one or more of the following fields and press Search. blank will not be used in filtering the list.					
Job Name: sheet rock	Job Code:					
Category:	GL Number:					
Manager:						
Search Reset Filter						

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.

	Category	Job Name	Jo	ob Code	GL	Number		M	anager	
-	Maintenance	Maintenance	1001			Empty		Lever, An	na	
	General	Pay / Billing		Employee	Override Ra	ite s				
	Ν	lame		C	urrent Ra	te		A	ction	
Ba	rtlett, Erin					+	0.15	0	lose	
	Hourly Rate	Rate Multiplier		Hourly Diffe	rential		Effecti	ve		
		%				05/12/2	009 05	:19 PM	Add	
			0.	53		12/01/20	09 12:0	00 AM	Edit	
			0.	15		05/01/20	09 12:0	00 AM	Edit	

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



			Display O	ptions	
			Search O	ptions	
	▲ Category	Job Name	Job Code	GL Number	Manager
)	Empty	paint	33	Empty	Keeler, Matthew M.
9	Empty	sheet rock	44	Empty	Keeler, Matthew M.
) [Empty	flooring	55	Empty	Keeler, Matthew M.

To Print Job Barcode Labels

Either....

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.

	🔺 Category	Job N	ame	Job Code	G	L Number	Mana	ger
	Empty	pai	nt	33		Empty	Keeler, Ma	tthew M.
	General	Division: Ke	eeler Co.					
	Billing	Job				Small Display		
	Pay Rates	Name: P	aint			Name:	paint	
- 1	Override Rates	-					G	
	Coverage	Category:	No Cate	egory	0	Manager:	Keeler, Matthew	M. \$
- 1	Default Membership	Job 🕞				1		
- 1	Membership	Code: 3	3					
- 1	Membership Restrictions						This Job is active	
- 1	Clocked In	Description:					Employees car	, clock into this
	Allocations	Description.						T CIOCK INTO THIS
	Modifications	-					job	
	Tracking Fields							
- 1								
								Print Barcode
							🔊 Revert Row	🔒 Save Row
	Empty	sheet	rock	44		Empty	Keeler, Ma	tthew M.
								100 \$

r k on the Print Barcode Labels ico	Print Barcode Labels	e page.	
Back	Create Jo	b Barcode Labels	
	Lab	el Template	
3x10 - Compatible with Avery	® 5160® (3 across, 10 do	wn; label size 2.6 incl	hes x 1 inch).
○ 2x6 - Compatible with Avery@			x 1.5 inch).
First Field: Job Name	Second Field:	oel Content	C Third Field: Leave Blank
Limit Job Selection Select jobs from this list to limit labe. Selecting no jobs will print all jobs in Page Title: Provide an optional page title for the	the list.		flooring paint sheet rock
with some labels. Sort Order Specify the sort order of the labels. I than "Job Name" then Jobs will be s	fyou select an option other	2	Category 🗘
sorted by this criteria. Number of Copies: Number of copies of each job barcode to print.	1	Offset X: Units of 1/72nd of a between -15 and 1:	
Labels to Skip: To reuse label stock, enter the number of label positions to skip before printing the first label on the first page.	0	Offset Y: Units of 1/72nd of a between -32 and 10	
Tip: If the labels don't align with right, positive Y offsets move the label	i down.	fset to make position adju 1ake PDF	stments. Positive X offsets move the labels to the

- 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.

8	Create a Job Category	
Name		
Description		
		Submit

Enter a unique Name with a maximum of 24 characters.
 Optionally, provide a more detailed **Description** of the category.
 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.

	🔺 Name	Description	Active
8	Touch Up	Go back after the job is complete, to touch up paint, or other details that since completion.	might have been missed or damaged Active
	Name		Touch Up
	Descr		Go back after the job is complete, to touch up paint, or other details that might have been missed or damaged since completion.
	Code		
	Delete		Delete
	Active		Active 🗘
			🔊 Revert Row 🛛 🔒 Save Row
$\overline{\nabla}$			100 \$

If necessary, enter/adjust the Category Name and/or Description.
 You can provide a Code to use to refer to this category in custom exports.
 You can delete this category only if there are no jobs associated with it, by clicking on the Delete button.
 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.
 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.

8	Display Options	
Show Hidden		
Display		

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.

8		Search Options	
		nter a value in one or more of the following fields and press Search. ds left blank will not be used in filtering the list.	
Name:	Touch Up	Description:	
Code:			
		Search Reset Filter	

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

	ob Cust	omer Administr	ation			
\bigcirc						
Jobs	Job	Work				
=	Categories	Orders	Add Job Customer			
.			Display Options			
•			Search Options			
		🔺 Customer Name	Address 1	City	State	Phone
			No Results Found			
\bigtriangledown						100 \$

Add a New Job Customer

1. Click the + (plus) sign to the left of the Add Job Customer bar to expand the window.

=	Add Job Customer	
Name		
Address 1		
Address 2		
City		
State		
Zip		
Phone		
Fax		
Submit		

Enter a unique Name with a maximum of 64 characters.
 Fill in the remaining details as needed.
 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.

		Address 1	City	Diate	Flione
-	Al Brethouse	3250 E 15th St	Atica	SC	
Name			A	Brethous	e
Address 1			32	250 E 15th	St
Address 2					
City			A	tica	
State			S	С	
Zip			74	221	
Phone					
Fax					
Delete					Delete
Active					Active 0
			Sever	Row	Save Row
					100 \$

If necessary, enter/adjust the Customer Name and/or other details.
 You can delete this customer only if there are no jobs associated with it, by clicking on the Delete button.
 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.
 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.

E Display Options	
Show Hidden	
Display	

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.

=			Sear	rch Options				
		list below, enter a value vildcard. Fields left blanl				d press Searc	:h.	
	Name: Address 1:							
	Address 2:		City:					
	State:	SC			ZIP Code:			
F	Phone Number:			Fa	x Number:			
			Search	Reset Filter				
	🔺 Cu	stomer Name		Address 1		City	State	Phone
	Al B	rethouse		3250 E 15th St	t	Atica	SC	
\bigtriangledown								100 🗘

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

Jobs Job Categories Cu	Job Job Jotomers							
±				Add a N	lew Work Order			
•				Sea	rch Options			
<u></u>					·		_	
A Name	Code P	O Number	Start Date	Wor Due Date	k Orders _{Note}	[Budgeted Hours	Show inactive N Hours Worked	Work Orders
▲ Name		O Number Empty	Start Date Empty					
▲ Name + demolition	999	Empty		Due Date Empty	Note Empty	Budgeted Hours	Hours Worked	Division
Name demolition remodel remodel Al Brethouse	999 001	Empty Empty	Empty 01/08/2014	Due Date Empty 12/31/1969	Note Empty	Budgeted Hours 00:00:00	Hours Worked Calculate Hours	Division Keeler Co.

Add a New Work Order

• Click the + (plus) sign to the left of the Add a New Work Order bar to expand the window.

8	Add a	New Work Order		
Work Order Name:	remodel Al Brethouse	Copy From:	remodel	▼ Add

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.

emolition 9 model 0 model Al Brethous 0 General Jobs Segmer	999 001	Empty	Start Date Empty	Due Date Empty	Note Empty	Budgeted Hours 00:00:00	Hours Wo Calculate		Division Keeler C
emodel Al Brethous C General Jobs Segmer	001			Linpty					
emodel Al Brethous (General Jobs Segmer			01/08/2014	12/31/1969	Empty	00:00:00	Calculate		Keeler C
General Jobs Segmer	0010					00:00:00	Calculate		Keeler C
				12/31/1909	prime paint beuroom	00.00.00	Carculate	nours	Reeler
Work Order Name	ins ba	reques	Reports				remodel A	l Breth	ouse
LCD Name							remodel AB		
Code							0011		
PO Number									
Note						prime paint bedroon	ns		
Start Date							12/19/2013		
Due Date									
Customer							Al Brethouse 🗘		
Status							primed		
Revision									
Description									
Released									
ltem									
Reorder Job Sequences							✓ Reorder Job Sequence		
Delete Work Order							Dele	ete Wor	k Order
Allow Use									low use
						5	Revert Tab	1	ave Tab

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.

- 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 <u>Job Customers</u> 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 continuous wet till institute order. contiguous vet 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

						Work Ord	lers			
		•	Name	Code	PO Number	Start Date	Due Date	1	Note	Division
	remodel	AlBr	ethouse	Empty	Empty	12/19/2013	12/31/1969	prime pain	t bedrooms	Keeler Co.
	General	Jobs	Barcodes	Reports						
									Add New	Save Sort Order
		Cate	gory	Name Code	Job Or			love Down	Chang	e Order To
						No Results	Found			
										100 \$
	\bigtriangledown									
								5	Revert Row	ave Row
•	remodel			001	Empty	01/08/2014	12/31/1969		Empty	Keeler Co.
۲	demoliti	on		999	Empty	Empty	Empty		Empty	Keeler Co.
										100 \$
\vee										

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.

								W	ork Ord	ers						
	A	Name		Code	PO Num	ber Start	Date	Due Date	1	Note		Budgete	d Hours	Hours	Worked	Division
٠	demolitio	n		999	Empt	y En	npty	Empty		Empty		00:00	0:00	Calcula	ate Hours	Keeler Co.
٠	remodel			001	Empt	y 01/08	/2014	12/31/19	59	Empty		00:00	00:00	Calcula	ate Hours	Keeler Co.
	remodel /	Al Bre	thouse	0011	Empt	y 12/19	/2013	12/31/19	59 prime	paint bedro	oms	00:00	0:00	Calcula	ate Hours	Keeler Co.
	General	Jobs	Segmer	nts B	arcodes	Reports										
												[Add N	ew Job	Save So	ort Order
	-								rk Orde							
		tegory	Nam	-	Code	Budgeted			Worked	Job Order	Mon	ve Up	Move D	own	Change Ord	er Io
			floorii	ng	55	00:00	:00	00:	00:00	1						
	۲		pain	it	33	00:00	:00	00:	00:00	2	4					
	\bigtriangledown														1	100 🗘
$\overline{\vee}$																100 \$

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.

🔺 Name Co								
	de PO Numb	er Start Date	Due Date	Note	Budgete	ed Hours Hour	s Worked	Division
demolition 99	9 Empty	Empty	Empty	Empty	00:0	0:00 Calcul	ate Hours	Keeler Co
remodel 00	1 Empty	01/08/2014	12/31/1969	Empty	00:0	0:00 Calcul	ate Hours	Keeler Co.
remodel Al Brethouse 00	11 Empty	12/19/2013	12/31/1969	prime paint bedroom	s 00:0	0:00 Calcul	ate Hours	Keeler Co.
General Jobs Segments	Barcodes	Reports						
						Add New Job	Save So	rt Order
Category Name	Code E	ludgeted Hours		Order Jobs orked Job Order	Move Up	Move Down	Change Ord	er To
e flooring	55	00:00:00	00:00	-	nove op	V		
Note: Removing a jo	ob or chang	jing a select	ed job will d	isconnect all worked	time for	this job from th	nis work or	der
Job						fl	ooring (5	5) 🗘
Detail								
Time Budget								
Delete						[Remove t	nis Iob
						L		
					5	Revert Row	🔒 Save	Row
🖮 paint	33	00:00:00	00:00	:00 2				
							1	00 0
\vee								

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.

				Wor	k Orders			
🔺 Name	Code	PO Number	Start Date	Due Date	Note	Budgeted Hours	Hours Worked	Division
🖶 demolition	999	Empty	Empty	Empty	Empty	00:00:00	Calculate Hours	Keeler Co.
😬 remodel	001	Empty	01/08/2014	12/31/1969	Empty	00:00:00	Calculate Hours	Keeler Co.
remodel Al Brethouse	0011	Empty	12/19/2013	12/31/1969	prime paint bedrooms	00:00:00	15:15:31	Keeler Co.
∇								100 \$

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.

🔺 Name	Code	PO Number	Start Date	Wor Due Date	k Orders _{Note}	Budgeted Hours	Но	urs Worked	Division
🗉 demolition	999	Empty	Empty	Empty	Empty	00:00:00	Calc	ulate Hours	Keeler Co
=) remodel	001	Empty	01/08/2014	12/31/1969	Empty	00:00:00	Calc	ulate Hours	Keeler Co
eremodel Al Brethouse	0011	Empty	12/19/2013	12/31/1969	prime paint bedrooms	00:00:00	Calc	ulate Hours	Keeler Co
Name		Deny Clo	- ekin -	Work Or	rder Segments Budgeted Hours		s Worke	Add New S	egment
		Deny Cit	ocking	No R	esults Found	Hour	SWOTK		.00 ¢
$\overline{\nabla}$									100

• To create a new Segment, click the Add New Segment button

Segment Name The name of this segment.	ork Order Segment Painting
Description A description of this segment.	Prime, Paint, and Touch up
Deny Clocking Enable this option to deny employe in this Segment.	ees from clocking in to Jobs
Budgeted Hours Method Specify how budgeted hours show calculated for this Segment.	Use Budgeted Hours Of Jobs

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.

					Wor	k Orders				
	🔺 Name	Code	PO Number	Start Date	Due Date	Note	Budgeted Hours	Hou	rs Worked	Division
+	demolition	999	Empty	Empty	Empty	Empty	00:00:00	Calcu	late Hours	Keeler Co.
•	remodel	001	Empty	01/08/2014	12/31/1969	Empty	00:00:00	Calcu	ilate Hours	Keeler Co.
	remodel Al Brethouse	0011	Empty	12/19/2013	12/31/1969	prime paint bedrooms	00:00:00	Calcu	ilate Hours	Keeler Co.
	General Jobs Segmen	nts Ba	arcodes R	eports						
									Add New S	egment
					Work Or	der Segments				
	Name		D	eny Clocking		Budgeted Hours	Ho	urs Worl	ked	Level
	🛛 🖶 🛛 Painting					00:00:00	0	0:00:00	0	N/A
	∇								1	.00 🗘

Click on the + (plus) sign to the left of the Segment Name.

model Al Bre	ethouse 00	11 Empty	12/19/2013	12/31/1969 prime	paint bedrooms	00:00:00	Calculat	e Hours	Keele
General Jobs	Segments	Barcodes	Reports						
							Ad	id New S	egme
	Name		Deny Clocking	Work Order Se	gments dgeted Hours	L.	urs Worked		Leve
- F	Painting				00:00:00		00:00:00		N/A
General Job									
Segment M	lame						Painting		
Descriptio	n				P	rime, Paint,	and Touch	un	
						inite, i carrigi		, ap	
Deny Cloc	king						6	Deny C	locki
Budgeted	Hours Mot	hod							
Budgeteu	nours me	illou				Specify	Budgete	d Hours	
Budgeted	Hours					2	5:00:00		
Delete Seg	ment						(Delete S	egme
						5	Revert Tab	si 🔒 Si	ave Ta

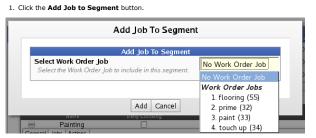
• From the GENERAL tab, you can make changes to any of the information used to create the Segment.

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.

) rer	nodel Al E	rethouse 0	011 Empty	12/19/2013	12/31/1969	prime paint bedrooms	5 00:00:00	Cal	culate Hours	Keeler Co
C	General Jo	bs Segments	Barcodes	Reports						
									Add New S	Segment
					Work Or	der Segments				
		Name		Deny ⊂locking		Budgeted Hours		Hours Wo	orked	Level
н.	-	Painting				00:00:00		00:00:	00	N/A
	General Jo	obs Actions								
									Add Job To S	egment
				J	obs in Se	gment "Painting"				
	Catego	ny Nam	e Code	Job Ord	er .	Budgeted Hours	Ho	urs Worke	d R	emove
					No F	Results Found				
	\bigtriangledown								1	00 00.

• 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.



Select a Job from the drop down box to be included in this Segment.
 Click the Add button.

erremodel Al Brethouse 0011 Empty 12/19/2013 12/31/1969 prime paint bedrooms 00:00:00 Calculate Hours Keeler Co.
General Jobs Segments Barcodes Reports

Na	me	Deny Clocking		der Segments Budgeted Hours	Нол	irs Worked		Level
Pain	ting			25:00:00	1	5:14:38		60.98%
General Jobs	Actions							
							Add Jo	b To Segme
Category	Name	Code	Jobs In Seg Job Order	gment "Painting" Budgeted Hours		Hours Wo	rked	Remove
	prime	32	2	00:00:00		10:00:	10	×
	paint	33	3	00:00:00		05:14:	50	×
	touch up	34	4	00:00:00		00:00:	00	×
								100

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.

General Jobs Segments	Barcodes Reports			
			Add Ne	w Segme
	Wor	k Order Segments		
Name	Deny Clocking	Budgeted Hours	Hours Worked	Level
Painting		25:00:00	00:00:00	N/A
General Jobs Actions				
			Add Action t	o Segmer
	Actions f	or Segment "Painting"		
Nar		Last Triggered	D	elete
		No Results Found		
				100

• To setup Alerts and other actions, go to the ACTIONS tab and click the Add Action to Segment button.

New Work Ord	er Segment
Action Name The name of this action.	Time almost depleted
Description <i>A description of this action.</i>	
	.::
Trigger At Percentage When hours worked in this Segment reach percentage of the budgeted hours this Action disable.	
Set Deny Clocking When this action is triggered should it set th Clocking flag for this Segment?	Deny Clocking
Send Email When this action is triggered should it send	an email alert?
Send Message To Employee Emails will be sent to this employee.	🔍 Keeler, Larry 🔄
Send Message To Address Emails will also be sent to this address.	
Email Template When sending alerts you can override the s message using a template.	tock No Template Selected 🗘

Action Example 1:

- ercentage of the budgeted hours this Action will be triggered. Set to blank to disable. employees will not be able to clock in to any job in this Segment.

- Separate mutilple addresses with a space. have the IPSEML module you can configure your own template.

Add Action	2 Division of the second second head reading
	to Segment
New Work O	der Segment
Action Name The name of this action.	Time 100% Deplet
Description A description of this action.	
Trigger At Percentage	100
When hours worked in this Segment reac	h this
	h this
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable.	h this tion will be triggered. Set to blank to
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking	h this ion will be triggered. Set to blank to
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable.	h this ion will be triggered. Set to blank to
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment?	this ion will be triggered. Set to blank to the Deny
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set	this ion will be triggered. Set to blank to the Deny
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment? Send Email When this action is triggered should it set	this ion will be triggered. Set to blank to the Deny d an email alert?
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment? Send Email When this action is triggered should it set Send Message To Employee	this ion will be triggered. Set to blank to the Deny
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment? Send Email When this action is triggered should it set Send Message To Employee Emails will be sent to this employee.	this ion will be triggered. Set to blank to the Deny d an email alert?
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment? Send Email When this action is triggered should it set Send Message To Employee Emails will be sent to this employee. Send Message To Address	this ion will be triggered. Set to blank to the Deny d an email alert?
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment? Send Email When this action is triggered should it set Send Message To Employee Emails will be sent to this employee.	this ion will be triggered. Set to blank to the Deny d an email alert? Keeler, Matthew M.
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment? Send Email When this action is triggered should it set Send Message To Employee Emails will be sent to this employee. Send Message To Address	this ion will be triggered. Set to blank to the Deny d an email alert? Keeler, Matthew M. mmk@keelerco.co
When hours worked in this Segment reac percentage of the budgeted hours this Ac disable. Set Deny Clocking When this action is triggered should it set Clocking flag for this Segment? Send Email When this action is triggered should it set Send Message To Employee Emails will be sent to this employee. Send Message To Address Emails will also be sent to this address.	this ion will be triggered. Set to blank to the Deny d an email alert? Keeler, Matthew M mmk@keelerco.co

model Al Bretho	ouse 0011 Empty	12/19/2013	12/31/1969 prime paint bedrooms	00:00:00	Calc	ulate Hours	Keeler C
General Jobs S	egments Barcodes	Reports					
						Add New S	egment
			Work Order Segments				
Nar	ne De	eny⊂locking	Budgeted Hours	Hours Wo	rked	L	evel
Paint	ting		25:00:00	15:15:	31	61.	03%
General Jobs A	Actions						
					Add	Action to S	egment
			tions for Segment "Painting"				
	N	ame	Level	Last T	riggere	d	Delete
	Time 1009	% Depleted	100.00%	/	Vever		×
	Time almo	ost depleted	75.00%	1	Vever		×
						1	00 0
∇						G	
					_		_
						1	00 \$
\vee							

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 functions available to show work order Segment information on Custom Payroll reports. See the <u>Supported Functions for Advanced Expressions</u> 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 <u>Work Order Report</u>.

				Wor	k Orders			
🔺 Name	Code	PO Number	Start Date	Due Date	Note	Budgeted Hours	Hours Worked	Division
demolition	999	Empty	Empty	Empty	Empty	00:00:00	Calculate Hours	Keeler Co
remodel	001	Empty	01/08/2014	12/31/1969	Empty	00:00:00	Calculate Hours	Keeler Co
remodel Al Brethouse	0011	Empty	12/19/2013	12/31/1969	prime paint bedrooms	00:00:00	Calculate Hours	Keeler Co
General Jobs Segmer	its Ba	arcodes R	eports					
Notice Warning: This work order contains one or more job with codes less than 4 characters. These can be used, but such job barcodes will not scan. If you intend to scan the job codes, make sure all job codes are at least 4 characters.								
Code 128 PDF							Generate Code	128 PDF
Code 39 PDF							Generate Code	39 PDF
Code 128 Notes PDF Generate Code 128 Notes PDF Notes PDF								
Code 128 Two Jobs PDF Generate Code 128 Two Jobs PDF								
Code 128 Two Jobs PDF Name Under Code Code 128 Two Jobs PDF Name Under Code								
Print Work Order Labels Print Work Order Labels								
100 🕏								

- 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.

TimeIPS :: Time Clock, Attendance and Payroll So...



Name: remodel Al Brethouse	Start: 2013-12-19	Due: Not set	DO# Not coorified
	Start: 2015-12-19	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.

General Jobs Segments Barcodes Reports	
Job Routing (PDF)	Generate Job Routing Work Order Report
Job Routing (HTML)	Generate Job Routing Work Order Report
7	100 \$

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.

File	Edit	View	60			j-work-o Help	rder.pdf			- 0
		us 🗳					Fit Page	e Width 🗸		
	s s	++001			Job Routing	Job: ren Al Breth		r++	-0011	
			D	I escrip Revis				primed 12/19/2013		
	prime pai Oper	nt bedroon WC	rs					5	5/0	
	1	55 flo	oring							

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.

=	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.						
Name:		LCD Name:					
Code:	001	P.O. Number:					
Note:		Customer Name:					
Search Reset Filter							

□ Show inactive Work Orders

Work Orders ▲ Name Code PO Number Start Date Due Date Note Budgeted Hours Hours Worked Divi								
remodel						00:00:00		
emodel .	001	Emply	01/08/2014	12/31/1969	Empty	00.00.00	Calculate Hours	Keeler Co
🖶 remodel Al Brethouse	0011	Empty	12/19/2013	12/31/1969	prime paint bedrooms	00:00:00	Calculate Hours	Keeler Co
								100 \$
\sim								

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 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.

Remote Clock li	
١	Nednesday, January 08, 2014 2:34PM CST
Badge Number:	1005
Project:	remodel Al Brethouse
Job:	paint (33) 🗘
Department:	Default Department 🗘
Notes:	
	Clock In/Out
	Check Status
	Return to My TimeIPS
	© 2004-2014 - <u>TimeIPS_Inc</u> - All Rights Reserved. TimeIPS and the TimeIPS logo are registered trademarks of TimeIPS, Inc. Innel System "and "Ran your business. Well Watch the clock." are trademarks of TimeIPS, Inc. This product is protected by one or more patents. Patent No. US 7,114,648 B2.

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

Job Import Administration	
Jobs Job Uork Categories Customers Orders	
Job	Export
Choose Export:	Jobs Include Inactive Items Export Data
lob imp	ort/Update
Job Import/Update File:	Browse No file selected.
Job Import/Update:	Jobs (Job Name as key) 🗘 Import/Update
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. Tip: Export and re-import job data to make large numbers of changes at one time.	Note: For instructions and details on import/export file formats, click the page help icon at the top right.

Export Job Data

5

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.

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 <u>OpenOffice</u> Calc.

	Opening jobs.csv	×			
You have chosen to	open:				
jobs.csv					
which is: CSV document (281 bytes)					
from: http://asp.timeips.com:29340					
What should Firefox do with this file?					
O <u>O</u> pen with	LibreOffice Calc (default)	0			
● <u>S</u> ave File					
Do this automatically for files like this from now on.					
	Cancel	ОК			

- [NOTE: Your screen may look different, depending on your computer's operating system.]
- Adjust the spreadsheet as necessary.
 O 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
- If you draw have a spreadsheet of the information you wish to import open readed 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.
 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.

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.

Job Export						
	Jobs					
Choose Export:	Include Inactive Items 🗆					
	Export Data					
Job Impo	prt/Update					
Job Import/Update File:	Browse jobs.csv					
Job Import/Update:	Jobs (Job Name as key) 🗘 Import/Update					
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. Tip: Export and re-import job data to make large numbers of changes at one time.	Note: For instructions and details on import/export file formats, click the page help icon at the top right.					

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

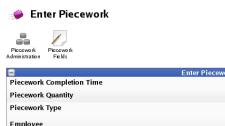
The employees allowed to work on each type of piecework can be restricted.

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



8	Ent	ter Piecework	
Piecework Completion Time			01/10/2014 10:55:28 AM
Piecework Quantity			0
Piecework Type			Finders Fee 🗘 Reset
Employee			🔍 Boresow, Patty 🛛 😂
Department			Default Department 🗘
		Submit	
	Disp	lay Options	
From:	To:		Range:
01/10/2014 12:00:00 AM	01/11/2014 12:00:00 AM	Today	•
P	iecework:	Employee Selection:	
All F	Piecework 🗘 🖳 All Visib	le Employees In Keeler Co.	. •
		Submit	
Employee	Piecework	Quantity	▼ Time Total
	No R	esults Found	
∇			100 0
			Total: 0.

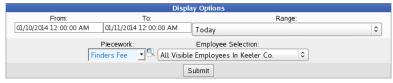
Enter New Piecework

- 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:

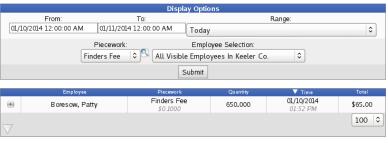
 Piecework Completion Time: Choose the effective date and time of the piecework event by clicking in the field and selecting the date from the drop down calendar. To change the time, highlight the displayed time then type over it.
 Piecework Quantity: Enter the number of piecework units for the event.
 Piecework Piecework Tory for the drop down list, choose the type of piecework 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.
- 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.

	Employee	Piecework	Quantity	🔻 Time	Total			
•	Boresow, Patty	Finders Fee \$0.1000	650.000	01/10/2014 01:52 PM	\$65.00			
Details	Fields							
Dele	te Piecework Event				Delete			
Piec	ework Completion Time			01/10/2014 0	1:52:29 PM			
Piec	ework Quantity	650.000						
Piec	ework Type			(Finders Fee			
Depa	artment		No De	epartment	\$			
Note	1 							
_				🔊 Revert Row	🔒 Save Row			
\bigtriangledown					100 \$			

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.

Employee	Piecework	Quantity	🔻 Time	Total
Boresow, Patty	Finders Fee \$0.1000	650.000	01/10/2014 01:52 PM	\$65.00
Details Fields				
Friend			X	
Family				
			Revert Row	🔒 Save Row
				100

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

🥩 Group Piecework

	Enter Group Piecework	
8	Display Options	
Employees	🔍 All Visible Employees In Keeler Co. 🛛 🗢	
Date Range	Today	1
	From: 01/10/2014 12:00:00 AM]
	To: 01/11/2014 12:00:00 AM	
Benefits	Any Benefit 🗘	
Jobs	Any Job ≎	
	View Piecework Groups	

Enter Group Piecework

• Click the + (plus) sign to the left of the Enter Group Piecework bar to expand the window.

Enter Group Piecework						
	Select Date Range	From	То			
Today	۵	01/20/2014 12:00:00 AM	01/21/2014 12:00:00 AM			
	S Keeler, Ma	presets for this page: tthew M. Selected Delete Preset				
🕅 Wichita	Select Employees	Who worked in these jobs flooring (55) paint (33) sheet rock (44)	Or used these benefits FMLA :: No Subclass Sick :: No Subclass Sick :: call-in Sick :: pre-scheduled Vacation :: No Subclass			
	For piecework: Tips - A	mount: 30				
		pmit				

- 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.
- From the Select Employees drop down list, select the Employee or group associated -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

8	Display Options
Employees	🔍 All Visible Employees In Keeler Co. 🔷 🗘
Date Range	Today
	From: 01/20/2014 12:00:00 AM
	To: 01/21/2014 12:00:00 AM
Benefits	Any Benefit \$
Jobs	Any Job ≎
	View Piecework Groups

- 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 Sens worked,
 Click on the View Piecework Groups button to view the results below.

8		Display Options		
Employees		🔍 🛛 All Visible Employe	ees In Keeler Co.	٢
Date Range		Today		0
		From:	01/20/2014 12:00:00 AM	
		To:	01/21/2014 12:00:00 AM	
Benefits			Any Benefit	•
Jobs			Any Job	0
		View Piecework Groups		_
	▼ Date	Group Piecework Assignments Note	Amount Per Hou	
	12:00 AM 01/20/2014	No Preset Selected	\$30.00 \$0.00	
\bigtriangledown			100	0

Edit or Delete Piecework Events

• Click the + (plus) sign to the left of the piecework event.

		▼ Date		Group Piece	work Assignments Note		Amour	ıt	Per Hour
		12:00 AM 01/2	20/2014		No Preset Selected		\$30.0	0	\$0.00
	General	Included Employees	Included Benefits	Included Jobs					
	Delete								Delete
	Piecew	vork Type					(Tips	0
	Amour	nt					30		
	Effecti	ve				01/	20/2014	12:00:0	0 AM
	Ending	9				01/	21/2014	12:00:0	0 AM
	Note						No Pre	set Sel	ected
						🧐 Reve	rt Row	🔒 Sa	ave Row
\bigtriangledown									100 \$

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.

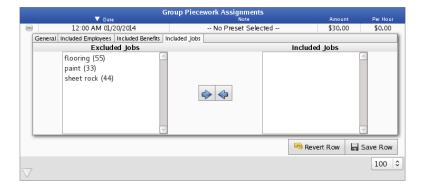
• From the Included Employees tab, you can highlight employees' names from the Excluded Employees list and click the arrow pointing right to include them. To exclude employees, click on those employees' names in the Included Employees list and click the arrow pointing left.

			Group Piece	work Assignments				
8 8 8	▼ Date		1	Note		Amoun		Per Hour
 	12:00 AM 01/2			No Preset Selec	ted	\$30.00		\$0.00
General	Included Employees		Included Jobs					
	Excluded	Employees			Included	l Employees	5	
	Backup, Joey		<u>^</u>		Wolf, Hannah		\sim	
	Boresow, Patty	/			Wolf, Jad			
	Keeler, Larry							
	Keeler, Matthev	w M.						
	Lierz, Ken		6					
	Lierz, Whitney							
	Tatro, Betty							
			~				\sim	
_								
					5) R	evert Row	🔒 Sa	ave Row
								100 \$

• 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.

	roup Piecework Assignments		
V Date	Note	Amou	nt Per Hour
12:00 AM 01/20/2014	No Preset Select	ted \$30.0	0 \$0.00
General Included Employees Included Benefits I	ncluded Jobs		
Excluded Benefits		Included Benefits	
FMLA :: No Subclass			~
Sick :: No Subclass			
Sick :: call-in			
Sick :: pre-scheduled	0 1		
Vacation :: No Subclass			
~			~
		🤄 Revert Row	🔒 Save Row
			100 \$

• 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

P	iecework Adn	nin			
	1				
Enter Piecework	Piecework Fields				
					Show Inactive Piecework 🗆
			Create a new	Piecework	
			Piecewo	rk 🔺 Name	
	۲			Tips	
					100 🗘

Add a New Type of Piecework

• Click the + (plus) sign to the left of the Create a new Piecework bar to expand the window.

8	Create a new Piecework	
Name		Finders Fee
	Create	

• 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.

	Piecework	🔺 Name	
-		Finders Fee	
General Pay Rates	Employee Rate Overrides Employees Fields		
Deactivate Piec	ework		Active 🗘
Piecework Nam	10		Finders Fee
Piecework Des	cription		Found Paying Customer
Include in FLS	A Effective Wage Calculation		Do Not Include
PO Number			
GL Number			
Pay Code			FF10
Pay SubCode			
Alternate Numb	per		
			🔊 Revert Row 🛛 🔒 Save Row
		Tips	
			100

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 following 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 time

		Pie	cework	ıme		
			Finders	5 Fee		
General Pay Rates	Employee Rate Overrides	Employees Fields				
Pay Per Un	it Time Pe	r Unit	Rate Percenta	ige	Effective	
			10	%	01/01/2014 12:00:00 AM	Add
					Piecework Pay Audit H	istory
					🔊 Revert Row 🛛 🗐 Save	Row

- 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 employee 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 Quantity 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 (ak Quantity) entered on the Enter Piecework page.
- 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.

		Piecework		
		Finders Fee		
General Pay Rates Employe	e Rate Overrides Employees	Fields		
Pay Per Unit	Time Per Unit	Rate Percentage	Effective	
		%	01/10/2014 10:29:44 AM	Add
		10.000000%	01/01/2014 12:00:00 AM	Edit
			Piecework Pay Audit Hist	ory
			🥱 Revert Row 🛛 🔒 Save R	low

Click on Edit to make changes, delete, or optionally set an expiration date.

		Piecewoi		
			A Name Finders Fee	2
General Pay Rates Employee Rate Overrides	Employees	Fields		
	Edi	t Piecewo	rk Rate	
Pay Per Unit				
Paid Time Per Unit				
Rate Multiplier Per Unit				10.000000
Effective Time				01/01/2014 12:00:00 AM
Effective Until				
Expires On				No Expiration
	Save Cha	inges De	lete Cancel]
				🔊 Revert Row 🛛 🖥 Save Row

After editing, click on the Save Changes button to save.
To remove this Pay Rate, click on the Delete button.

		Piecework	
		Finders Fee	
General Pay Rates Employe	ee Rate Overrides Employees	Fields	
Pay Per Unit	Time Per Unit	Rate Percentage	Effective
		%	01/10/2014 10:29:44 AM
		10.000000%	01/01/2014 12:00:00 AM E
			Piecework Pay Audit Histo
			🔄 Revert Row 🛛 🔒 Save Ro

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.

				Piec	ework ▲ ≀	Name			
(-				Finde	rs Fee			
General	Pay Rates	Employee Rate Overrides	Employees	Fields					
		Name			Current R	late		Act	ion
						Add Employ	/ee Rate	View	/ Audit History
							🤊 Rever	t Row	Save Row

• To create an override for an employee, click the Add Employee Rate button.

		Select Employee	
	Employee:	🕄 Keeler, Larry	•
		OK Cancel	

Select the employee's name from the drop down list and click OK.

			Piec	ework				
				🔺 N	lame			
-				Finder	rs Fee			
General Pay Rates	Employee Rate Ov	errides Employees	Fields					
	Name			Current R	ate	Act	ion	
Keeler, Larry				Default	t	Clo	se	
Pay Per Un	it Tir	ne Per Unit		Rate Percent	age	Effective		
				12	%	01/09/2014 12:25:03	PM	Add
						Employee Ra	te Audit H	listory
						🔊 Revert Row	🔒 Save	Row

- 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 employee 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.
 Chores the Effective a Effective data by cliciticating in the fidel and selection the data from the down calendar. To change the time, highlight the displayed time then the one over it

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.

					Piec	ework		
						🔺 Name		
	-					Finders Fee		
General	Pay Rates	Employee	Rate Overrides	Employees	Fields			
		Nam	ie			Current Rate	Action	
Keeler, I	arry					Default	Close	
Р	ay Per Un	it	Time Pe	r Unit		Rate Percentage	Effective	
						%	01/09/2014 12:26:40 PM	Add
					12%		01/09/2014 12:26:40 PM	Edit
							Employee Rate Audit	History
							🔊 Revert Row 🛛 🔒 Sa	ve Row

• Click on Edit to make changes, delete, or optionally set an expiration date.

			Piec	ework	▲ Name			
-				Fi	nders Fee			
General Pay Rates	Employee Rate Overrides	Employees	Fields					
	Name			Curre	nt Rate		Acti	ion
Keeler, Larry					[rate]	* 12%	Ba	ck
		Ð	dit Emp	oloyee Ra	ıte			
Pay Per Unit								
Paid Time Per L	Jnit							
Rate Multiplier I	Per Unit						12.00000	0
Effective Time							01/09/201	4 12:26:40 PM
Effective Until								
Expires On								No Expiratio
		Save C	nanges	Delete	Cancel			
							🔊 Revert Row	🔒 Save Row

After editing, click on the Save Changes button to save.
To remove this override, click on the Delete button.

Piecework									
6	-		Finders Fee						
General	Pay Rates	Employee Rate Overrides	Employees	Fields					
Name					Current R	ate		Act	ion
Keeler, l	_arry					[rate] * 12%		E	dit
					[Add Employ	vee Rate	View	v Audit History
_						[🥱 Rever	t Row	🔒 Save Row

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.

	Finder	s Fee	
General Pay Rates Employee Rate Overri	des Employees Fields		
Other Employees		Employees for this	Piecework
Backup, Joey			~
Boresow, Patty			
Keeler, Larry			
Keeler, Matthew M.	=		
Lierz, Ken		1	
Lierz, Whitney			
Tatro, Betty			
	~		2
Wolf, Hannah		to: All Employees 💲	
Wolf, Hannah			

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.

				Piec	ework ▲ Name		
-)				Finders F		
General F	Pay Rates	Employee Rate Overrides	Employees	Fields			
		Available Fields				 Current Fields	
					•		<
						🥱 Revert Row	🔒 Save Row

To create new fields, go to Piecework » Piecework Fields and see instructsions in the Piecework Fields article.

			Piecework	▲ Name	1	
-				Finders Fe	ee	
General Pay Rates		Employees	Fields			
	Available Fields	_			Current Fields	
Cash Check		<u>^</u>				^
Family Friend						
					Severt Row	Save Row
				Tips		
						100 🗘

• 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.

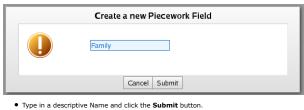
Using the left pane Main Menu » Administration, click on: Piecework » Piecework Fields

Piecework Fields		
Piccework Enter Administration Piccework		
	🔺 Name	
	No Results Found	
\bigtriangledown		Add a new Field

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.



Piecework Fields	
Piccework Enter Administration Piccework	
🔺 Name	
Cash	Delete
Check	Delete
Family	
Friend	
\bigtriangledown	Add a new Field
 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 Piecework Event Entries
 Piecework Pay Rates
 Piecework Membership

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

Import/Export	
Piecew	ork Export
Export	Piecework 🗘
Export Range (optional)	Today
From 01/20/2014 12:00:00 AM	To 01/21/2014 12:00:00 AM
Exp	ort Data
Piecew	ork Import
Import	Browse No file selected.
Microsoft Excel™ Compatibility	
Imp	ort File
1 Tip: Export and re-import piecework data to make large numbers of changes at one time.	Note: For instructions and details on import/export file formats, click the page help icon at the top right.

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

- or the information to create a template.
 O Select the type of data to Export: Piecework, Piecework Event Entries, Pay Rates, or Membership.
 O 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.

Piece	vork Export
Export	Pay Rates 🔹
Export Range (optional)	✓ This Month
From 01/01/2014 12:00:00 AM	To 02/01/2014 12:00:00 AM
Ex	port Data
Piece	vork Import
Import	Browse No file selected.
Microsoft Excel™ Compatibility	
Im	port File
1 Tip: Export and re-import piecework data to make large numbers of changes at one time.	1 Note: For instructions and details on import/export file formats, click the page help icon at the top right.

• Click on the Export Data button.

TIP: To edit the resulting .csv file, we recommend a spreadsheet application such as Excel™ or <u>OpenOffice</u> Calc.

A	В	С	D	E	F	G
Piecework Name	Start Time	End Time	Employee Name (if Applicable)	Pay Per Unit	Time Paid Per Unit	Pay Rate Percentage Per Unit
Finders Fee	01/01/2014 12:00:00 AM	02/01/2014 12:00:00 AM	Keeler, Larry			12
Finders Fee	01/01/2014 12:00:00 AM			0.1		
1						

2. Adjust the spreadsheet as necessary

Adjust the spreadsheet as necessary.
 O 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.
 O 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.
 Save the spreadsheet file of the information you wish to import, enter the information into the template file you created in step 1.
 Save the spreadsheet file of the information you wish to import as a Comma Separated (CSV) file.
 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 <u>Piecework</u>, <u>Piecework Event Entries</u>, <u>Piecework Pay Rates</u>, and <u>Piecework Membership</u> instructions page. 1. Once the file is created, click on the **Browse** button and navigate to the CSV file to be imported.

P	Piecework Import					
Import	Browse piecework-pay-rates.csv					
Microsoft Excel™ Compatibility						
	Import File					
(i) Tip: Export and re-import piecework data to make large numbers of changes at one time.	Note: For instructions and details on import/export file formats, click the page help icon at the top right.					

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".
 Click on the Import button.

Import/Export	
1 unit rate(s) will be inserted. Any overlapping rates w 1 employee rate(s) will be inserted. Any overlapping ra	
	Cancel Accept

4. To continue with the import, click the Accept button. To abort the import, click on the Cancel button.

2 removed entries. 2 entries created.

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

Syste	em Settings	
Message Configuration		
System Management	Registration Number	167296-30699
DST Config	Serial Number	A13245S3000000
Time & Date	Enable Remote Service	Enable Remote Service
System Mail Settings	Restart Server	Restart Server
PHP Memory Settings	Restart Server Network	Restart Server Network
UPS Power Management	Shutdown Server	Shutdown Server
RAID	Save Changes	
Network Configuration	Save Changes	Save Registration Number
IPSDBRO Database Configuration		

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 <u>Remote Service Authorization page</u>.
 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.

System			
		CST - Central Time (Automatic DST)	Edit DST Boundaries
Management		con central nine (Automatic Don)	* Eurosi boundaries
DST Config	Time Zone DST Bounda	ries	
Time & Date			
System			
Mail Settings			
PHP			
Memory Settings			
UPS Power			
Management			
RAID			
Network			
Configuration			
IPSDBRO			
Database			
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

lack			
D		Data for CCT	
Day	light Saving/Summer Time (DST) Boundar	y Dates for CST	
he table below shows the date a ears.	nd time when DST begins and ends for the se	elected time zone in past, pr	esent and future
time in the "DST Ends" co The "Time saved" column normally 60 minutes (1 hou To edit a DST period simpl cancel the edit, or hit "Ent Although changes made ou never changes.	period, enter a date and time in the "DST Beg lumn (in Daylight Saving/Summer Time). There represents the amount of time clocks are shif yr). y click on the appropriate item to put the row er" or click "Edit" to commit the changes. n this page take effect immediately and retroa II your DST boundary dates, click to erase all	n click "Add New". ted when entering or exiting into edit mode. Hit "Esc" or actively, the actual time work	DST. This is click "Cancel" to ed (elapsed time
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
pr 01, 1990 02:00 AM CST	Oct 28, 1990 02:00 AM CDT	60 Minutes	Delete
pr 07, 1991 02:00 AM CST	Oct 27, 1991 02:00 AM CDT	60 Minutes	Delete
pr 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
pr 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
pr 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
pr 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
Aar 09, 2008 02:00 AM CST	Nov 02, 2008 02:00 AM CDT	60 Minutes	Delete
1ar 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
Aar 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

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	Use NTP Server	NTP is Running
DST Config Time & Date		Ose NTP
System	Force NTP Service Restart	✓ Force Restart
Mail Settings	NTP Server Address	192.168.168.201
PHP Memory Settings	System Time	02/06/2014 02:36:14 PM
UPS Power Management	Restart NTP Service	Restart NTP Service
RAID	Save Changes	Apply Changes
Network Configuration	3	Apply Changes
IPSDBRO		
Database Configuration		

• 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 d adjusting as needed.

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

System Management	Mail Server	mail.automatedconveyors
DST Config	Email Link Configuration	Domain Name 🗘
Time & Date System	Email Link Port Number	80
Mail Settings PHP	Secure Sockets	
Memory Settings UPS Power	Disable STARTTLS	STARTTLS
Management RAID	SMTP Username	bhampton@automatedcor
Network Configuration	SMTP Password	33055783
IPSDBRO Database		Restart Mail System View Errors
Configuration	Save Changes	Update 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 outly 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 it forwarding. If this is the case for you, Domain Name links will NOT work inside your network. In this case, select Provide Both Links.
- Benail 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
- Disable STARTLS : Some mail servers report that they have support of structure, but the 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

System Management DST Config	These options can have a significant impact on the performance of your system. Please only make changes if you are confident of their impact.	
Time & Date	Server Memory Allocation (Will Restart System)	200
System	Server Memory Anocation (Min Restart System)	200
Mail Settings	Server Opcode Cache Memory Allocation (Will Restart System)	64
PHP		
Memory Settings	Background Process Memory Allocation	200
UPS Power	Background Process Opcode Cache Memory Allocation	64
Management		
RAID	Save Changes	Apply Memory Settings
Network Configuration		······································
IPSDBRO		
Database		
Configuration		

- 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
 Beackground Process Memory Allocation: Specify the amount of internal system memory PHP is allowed to use on the Opcode Cache 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.

System	Your UPS is currently connected to r	nain power.	
Management	UPS Type		
DST Config	of 5 type	dumb	0
Time & Date	UPS Cable Type		
System	or 5 Cable Type	Serial 940-0020C	0
Mail Settings	Notify of Downey Loope Affect		-
PHP	Notify of Power Loss After	6 Seconds	0
Memory Settings			_
UPS Power	Automatically Shut Down After	10 Minutes	0
Management			
RAID	Save Changes	Update UPS Settin	ngs
Network			
Configuration			
IPSDBRO			
Database			
Configuration			

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 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.

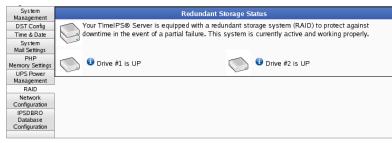
- NOTE: Be sure to indicate the exact model number found on the cable.
- Notify of Power Loss After pull-down indicates when TimeIPS will notify all employees with System Administrator security of the power loss via email and through the TimeIPS My
- Automatically shut down indicates when TimeIPS should 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.

System Management	Addressing Method	Static Address 😂
DST Config	IP Address	192.168.168.189
Time & Date		
System	Subnet Mask	255.255.255.0
Mail Settings PHP	Default Gateway	192.168.168.1
Memory Settings	DNS Servers	Primary
UPS Power Management		192.168.168.201
RAID		Secondary
Network		8.8.8
Configuration	Clock Access Port	
IPSDBRO Database Configuration	Confirm Network Changes	Confirm
	Save Changes	Update 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.

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.
 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

System	Limited Remote Database Username	readonly
Management DST Config	Limited Remote Database Password	
Time & Date	Limited Remote Database Password (confirm)	
System Mail Settings	Save Changes	Update Database Configuration
PHP Memory Settings		
UPS Power Management		
RAID		
Network Configuration		
IPSDBRO Database Configuration		
	ed Remote Database licername is the username used for remote dat	

- 3C-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.

Enable Remote Service Restarting/Shutting Down TimeIPS TimeIPS Server DST Configuration Adjusting SMTP Mail Settings Adjusting SMTP Mail Settings PHP Memory Settings System Settings IPSDBRO Database Configuration	See Also:
TimeIPS Server DST Configuration Adjusting Time/Date Settings Adjusting SMTP Mail Settings PHP Memory Settings System Settings	Enable Remote Service
Adjusting Time/Date Settings Adjusting SMTP Mail Settings PHP Memory Settings System Settings	Restarting/Shutting Down TimeIPS
Adjusting SMTP Mail Settings PHP Memory Settings System Settings	TimeIPS Server DST Configuration
PHP Memory Settings System Settings	Adjusting Time/Date Settings
System Settings	Adjusting SMTP Mail Settings
	PHP Memory Settings
IPSDBBRO Database Configuration	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

O Syste	em Settings	
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings PHP	Restart Server	Restart Server
Memory Settings	Restart Server Network	Restart Server Network
Database Configuration	Shutdown Server	Shutdown Server
-	Save Changes	Save Registration Number

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 <u>Remote Service Authorization page</u>.
 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.

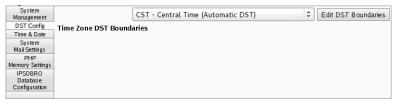
 Click the **Restart Server Network** button to restart the TimeIPS® server's network. Please wait 2-3 minutes for a network restart to finish. TimeIPS may be briefly unavailable
 If you need to move or completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off nower to the TimeIDS Server slick as the Christman Completely turn off now restart to the TimeIDS Server slick as the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to the Christman Completely turn off now restart to th 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

	m Datas fan CCT	
light Saving/Summer Time (DST) Bounda	ry Dates for CST	
nd time when DST begins and ends for the s	elected time zone in past, pr	esent and futur
eriod, enter a date and time in the "DST Bed	ins" column (in Standard Tin	ne) and a date
umn (in Daylight Saving/Summer Time). The	en click "Add New".	
	ifted when entering or exiting	DST. This is
click on the appropriate item to put the row	into edit mode. Hit "Esc" or	click "Cancel"
this page take effect immediately and retro	actively, the actual time work	(ed (elapsed ti
l your DST boundary dates, click to erase al	l changes and reset to defau	lts.
DST Ends	Time saved	
		Add New
		Delete
		Delete
Oct 29, 1989 02:00 AM CDT	60 Minutes	Delete
Oct 28, 1990 02:00 AM CDT	60 Minutes	Delete
Oct 27, 1991 02:00 AM CDT	60 Minutes	Delete
Oct 25, 1992 02:00 AM CDT	60 Minutes	Delete
Oct 31, 1993 02:00 AM CDT	60 Minutes	Delete
Oct 30, 1994 02:00 AM CDT	60 Minutes	Delete
Oct 29, 1995 02:00 AM CDT	60 Minutes	Delete
Oct 27, 1996 02:00 AM CDT	60 Minutes	Delete
Oct 26, 1997 02:00 AM CDT	60 Minutes	Delete
Oct 25, 1998 02:00 AM CDT	60 Minutes	Delete
Oct 31, 1999 02:00 AM CDT	60 Minutes	Delete
Oct 29, 2000 02:00 AM CDT	60 Minutes	Delete
Oct 28, 2001 02:00 AM CDT	60 Minutes	Delete
Oct 27, 2002 02:00 AM CDT	60 Minutes	Delete
Oct 26, 2003 02:00 AM CDT	60 Minutes	Delete
Oct 31, 2004 02:00 AM CDT	60 Minutes	Delete
Oct 30, 2005 02:00 AM CDT	60 Minutes	Delete
Oct 29, 2006 02:00 AM CDT	60 Minutes	Delete
Nov 04, 2007 02:00 AM CDT	60 Minutes	Delete
		Delete
	60 Minutes	Delete
Nov 07, 2010 02:00 AM CDT	60 Minutes	Delete
Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Nov 03, 2013 02:00 AM CDT Nov 02, 2014 02:00 AM CDT	60 Minutes 60 Minutes	Delete Delete
	nd time when DST begins and ends for the s eriod, enter a date and time in the "DST Beg umn (in Daylight Saving/Summer Time). The presents the amount of time clocks are sh (). y click on the appropriate item to put the row of wick "click" to commit the changes. this page take effect immediately and retro I your DST boundary dates, click to erase al OST Ends Oct 30, 2014 2:00 AM Oct 25, 1987 02:00 AM CDT Oct 30, 1988 02:00 AM CDT Oct 30, 1988 02:00 AM CDT Oct 28, 1990 02:00 AM CDT Oct 28, 1990 02:00 AM CDT Oct 28, 1990 02:00 AM CDT Oct 28, 1990 02:00 AM CDT Oct 28, 1990 02:00 AM CDT Oct 28, 1990 02:00 AM CDT Oct 28, 1990 02:00 AM CDT Oct 28, 1995 02:00 AM CDT Oct 28, 1995 02:00 AM CDT Oct 28, 1997 02:00 AM CDT Oct 28, 1997 02:00 AM CDT Oct 28, 1997 02:00 AM CDT Oct 28, 1999 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 28, 2000 02:00 AM CDT Oct 29, 2000 02:00 AM CDT Nov 04, 2007 02:00 AM CDT Nov 04, 2007 02:00 AM CDT Nov 07, 2010 02:00 AM CDT Nov 07, 2010 02:00 AM CDT Nov 07, 2010 02:00 AM CDT Nov 06, 2011 02:00 AM CDT	click on the appropriate item to put the row into edit mode. Hit "Esc" or " or click "Edit" to commit the changes. this page take effect immediately and retroactively, the actual itme work lyour DST boundary dates, click to erase all changes and reset to defau DST Ends Time saved Oct 30, 2014 2:00 AM 60 min Oct 30, 2014 2:00 AM 60 min Oct 30, 2014 2:00 AM 60 min Oct 30, 1988 02:00 AM CDT 60 Minutes Oct 28, 1989 02:00 AM CDT 60 Minutes Oct 28, 1990 02:00 AM CDT 60 Minutes Oct 27, 1991 02:00 AM CDT 60 Minutes Oct 28, 1990 02:00 AM CDT 60 Minutes Oct 29, 1989 02:00 AM CDT 60 Minutes Oct 29, 1993 02:00 AM CDT 60 Minutes Oct 29, 1993 02:00 AM CDT 60 Minutes Oct 29, 1993 02:00 AM CDT 60 Minutes Oct 29, 1995 02:00 AM CDT 60 Minutes Oct 28, 1997 02:00 AM CDT 60 Minutes Oct 29, 1995 02:00 AM CDT 60 Minutes Oct 28, 1997 02:00 AM CDT 60 Minutes Oct 28, 2000 02:00 AM CDT 60 Minutes Oct 28, 2000 02:00 AM CDT 60 Minutes

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	Use NTP Server	NTP is Running
DST Config		€ Ose NTP
Time & Date	Force NTP Service Restart	Force Restart
System Mail Settings PHP	NTP Server Address	ntp.timeips.com
Memory Settings	System Time	01/21/2014 12:12:49 PM
IPSDBRO Database	Restart NTP Service	Restart NTP Service
Configuration	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 d 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

System Management	Mail Server	localhost
DST Config	Email Link Configuration	Domain Name 🗘
Time & Date		
System	Email Link Port Number	80
Mail Settings PHP	Secure Sockets	Use SSL
Memory Settings IPSDBRO	Disable STARTTLS	Disable STARTTLS
Database Configuration	SMTP Username	
	SMTP Password	
		Restart Mail System
		View Errors
	Save Changes	Update 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 with 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 will server set ouries that the InterIPS. By system will server set point that they have support for STARITLS, but in fact do not. If you see messages in the "View Errors" link below indicating an inability to connect to server, by checking this option.
- Disable STARTIES : Some mail servers report that they have support for STARTIES, but in fact do hot. If you see messages in t 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 Username 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

System Management DST Config	These options can have a significant impact on the performance of your system. Please only make changes if you are confident of their impact.	
Time & Date	Server Memory Allocation (Will Restart System) 200	
System Mail Settings	Server Opcode Cache Memory Allocation (Will Restart System) 64	
PHP Memory Settings	Background Process Memory Allocation	200
IPSDBRO Database	Background Process Opcode Cache Memory Allocation	64
Configuration	Save Changes	Apply Memory Settings

- 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 salice or 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 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. To amount of memory and decrease system performance. The valid range is 50 up to 231
- needed for the Opcode Cache is static so changing this value may decrease system performance. The valid range is 32 up to 77

MB. The amount of memory needed for the Opcode Cache is statiClick the Apply Memory Settings button to save your changes.

IPSDBRO Database Configuration

System	Limited Remote Database Username	readonly
Management	Limited Remote Database Password	
DST Config		
Time & Date	Limited Remote Database Password (confirm)	
System Mail Settings	Save Changes Update Data	base Configuration
PHP		g
Memory Settings	s	
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 Osername is the username used for remote database access such as from an ODD-compliant application
 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



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

Or Syste	em Settings	
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25500201
Time & Date	Enable Remote Service	Enable Remote Service
System Mail Settings PHP	Restart Server	Restart Server
Memory Settings	Restart Server Network	Restart Server Network
IPSDBRO Database Configuration	Shutdown Server	Shutdown Server
Comgaration	Save Changes	Save Registration Number

1. From the System Management tab, click the Enable Remote Service button.

Remote Service Authorization



After reading the Remote Service Authorization, enter your Username and Password.
 If the technician indicated they would need access longer than 24 hours, check the "Authorize long-term remote service" box.
 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

O: Syste	em Settings	
1		
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings	Restart Server	Restart Server
PHP Memory Settings IPSDBRO	Restart Server Network	Restart Server Network
Database Configuration	Shutdown Server	Shutdown Server
	Save Changes	Save Registration Number

• 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

Syste	em Settings	
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings	Restart Server	Restart Server
PHP		
Memory Settings	Restart Server Network	Restart Server Network
IPSDBRO Database Configuration	Shutdown Server	Shutdown Server
	Save Changes	Save Registration Number

• Click on the DST Config tab to the left.

System Management	CST - Central Time (Automatic DST)
DST Config	Time Zone DST Boundaries
Time & Date	
System Mail Settings	
PHP	
Memory Settings	
IPSDBRO	
Database	
Configuration	

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

-

Day	light Saving/Summer Time (DST) Boundar	y Dates for CST	
he table below shows the date a ears.	nd time when DST begins and ends for the se	elected time zone in past, p	resent and future
time in the "DST Ends" cc The "Time saved" column normally 60 minutes (1 ho To edit a DST period simp cancel the edit, or hit "Ent Although changes made o never changes.	period, enter a date and time in the "DST Begi lumn (in Daylight Saving/Summer Time). Ther represents the amount of time clocks are shif ir). ly click on the appropriate item to put the row er' or click "Edit" to commit the changes. In this page take effect immediately and retroa ill your DST boundary dates, click to erase all	n click "Add New". ted when entering or exiting into edit mode. Hit "Esc" or ctively, the actual time worl	DST. This is click "Cancel" t ked (elapsed tim
DST Begins	DST Ends	Time saved	
Apr 1, 2014 2:00 AM	Oct 30, 2014 2:00 AM	60 min	Add New
pr 05, 1987 02:00 AM CST	Oct 25, 1987 02:00 AM CDT	60 Minutes	Delete
pr 03, 1988 02:00 AM CST	Oct 30, 1988 02:00 AM CDT	60 Minutes	Delete
pr 02, 1989 02:00 AM CST	Oct 29, 1989 02:00 AM CDT	60 Minutes	Delete
pr 01, 1990 02:00 AM CST	Oct 28, 1990 02:00 AM CDT	60 Minutes	Delete
pr 07, 1991 02:00 AM CST	Oct 27, 1991 02:00 AM CDT	60 Minutes	Delete
pr 05, 1992 02:00 AM CST	Oct 25, 1992 02:00 AM CDT	60 Minutes	Delete
pr 04, 1993 02:00 AM CST	Oct 31, 1993 02:00 AM CDT	60 Minutes	Delete
pr 03, 1994 02:00 AM CST	Oct 30, 1994 02:00 AM CDT	60 Minutes	Delete
pr 02, 1995 02:00 AM CST	Oct 29, 1995 02:00 AM CDT	60 Minutes	Delete
pr 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
pr 05, 1998 02:00 AM CST	Oct 25, 1998 02:00 AM CDT	60 Minutes	Delete
pr 04, 1999 02:00 AM CST	Oct 31, 1999 02:00 AM CDT	60 Minutes	Delete
pr 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
pr 07, 2002 02:00 AM CST	Oct 27, 2002 02:00 AM CDT	60 Minutes	Delete
pr 06, 2003 02:00 AM CST	Oct 26, 2003 02:00 AM CDT	60 Minutes	Delete
pr 04, 2004 02:00 AM CST	Oct 31, 2004 02:00 AM CDT	60 Minutes	Delete
pr 03, 2005 02:00 AM CST	Oct 30, 2005 02:00 AM CDT	60 Minutes	Delete
pr 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
1ar 09, 2008 02:00 AM CST	Nov 02, 2008 02:00 AM CDT	60 Minutes	Delete
lar 08, 2009 02:00 AM CST	Nov 01, 2009 02:00 AM CDT	60 Minutes	Delete
ar 14, 2010 02:00 AM CST	Nov 07, 2010 02:00 AM CDT	60 Minutes	Delete
lar 13, 2011 02:00 AM CST	Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
	Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
far 11, 2012 02:00 AM CST	NOV 04, 2012 02.00 AM CD1		
	Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Mar 11, 2012 02:00 AM CST Mar 10, 2013 02:00 AM CST Mar 09, 2014 02:00 AM CST			Delete 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.

Nov 06, 2011 02:00 AM CDT	60 Minutes	Delete
Nov 04, 2012 02:00 AM CDT	60 Minutes	Delete
Nov 03, 2013 02:00 AM CDT	60 Minutes	Delete
Nov 02, 2014 02:00 AM	60 min	Edit Cancel
Nov 01, 2015 02:00 AM CDT	60 Minutes	Delete
Nov 06, 2016 02:00 AM CDT	60 Minutes	Delete
	Nov 04, 2012 02:00 AM CDT Nov 03, 2013 02:00 AM CDT Nov 02, 2014 02:00 AM Nov 01, 2015 02:00 AM CDT	Nov 04, 2012 02:00 AM CDT 60 Minutes Nov 03, 2013 02:00 AM CDT 60 Minutes Nov 02, 2014 02:00 AM 60 min Nov 01, 2015 02:00 AM CDT 60 Minutes

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

O Syste	em Settings	
÷.		
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000525501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings PHP	Restart Server	Restart Server
Memory Settings IPSDBRO	Restart Server Network	Restart Server Network
Database Configuration	Shutdown Server	Shutdown Server
	Save Changes	Save Registration Number

• Click on the Time & Date tab to the left.

Time Synchronization

System Management DST Config	Use NTP Server	NTP is Running
Time & Date System	Force NTP Service Restart	Force Restart
Mail Settings	NTP Server Address	ntp.timeips.com
PHP Memory Settings	System Time	01/21/2014 12:12:49 PM
IPSDBRO Database	Restart NTP Service	Restart NTP Service
Configuration	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.

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 Olick 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:

- Deselect the Use NTP option and adjust the time and date appropriately. Click on the Apply Changes button to save the changes.
- 1. 2.
- 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 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

O Syste	em Settings	
1		
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings PHP	Restart Server	Restart Server
Memory Settings IPSDBRO	Restart Server Network	Restart Server Network
Database Configuration	Shutdown Server	Shutdown Server
	Save Changes	Save Registration Number

• Click on the System Mail Settings tab to the left.

System Management	Mail Server	localhost
DST Config	Email Link Configuration	Domain Name 🗘
Time & Date		
System	Email Link Port Number	80
Mail Settings PHP	Secure Sockets	Use SSL
Memory Settings IPSDBRO	Disable STARTTLS	Disable STARTTLS
Database Configuration	SMTP Username	
	SMTP Password	
		Restart Mail System
		View Errors
	Save Changes	Update Mail Settings

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):	smtp.east.cox.net
Cox (west):	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.

- C 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 requires that the TimeIPS® system use SMTP over SSL. Do not check this box if your mail server requires that they have 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

O Syste	em Settings	
-		
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings PHP	Restart Server	Restart Server
Memory Settings IPSDBRO	Restart Server Network	Restart Server Network
Database Configuration	Shutdown Server	Shutdown Server
	Save Changes	Save Registration Number

• Click on the PHP Memory Settings tab to the left.

System Management DST Config	These options can have a significant impact on the performance of your system. Please only make changes if you are confident of their impact.	
Time & Date	Server Memory Allocation (Will Restart System)	200
System Mail Settings	Server Opcode Cache Memory Allocation (Will Restart System)	64
PHP Memory Settings	Background Process Memory Allocation	200
IPSDBR0 Database	Background Process Opcode Cache Memory Allocation	64
Configuration	Save Changes	Apply Memory Settings

• 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,

- 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. 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

Syste	m Settings	
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings PHP	Restart Server	Restart Server
Memory Settings	Restart Server Network	Restart Server Network
Database Configuration	Shutdown Server	Shutdown Server
Comgutation	Save Changes	Save Registration Number

• Click on the Message Configuration icon at the top of the page. Message Configuration

System Message Configuration

Static Alert Email Addresses				
	Address	Note	Delete	
	mkeeler@timeips.com	Company admin address	5. 💥	
			100 0	
\bigtriangledown			Add Alert Email	
	System Me	essage Types		
	🔺 Message Type	Employee Recipients	Static Email Recipients	
	General System Messages	0	1	
	Successful Backup Notices	0	1	
	Backup Failure Notices	0	1	
	Offsite Backup Completion	0	1	
	System Updates Available	0	1	
	System Update Errors	0	1	
۰	UPS Power Failure	0	1	
٠	UPS Power Restored	0	1	
±	Backup Size Exceeded	0	1	
*	Backup Size Approaching Capacity	0	1	
	RAID Failure	0	1	
*	Clock Network Monitoring Alerts	0	1	
\bigtriangledown			100 \$	

Add Alert Email

• Click on the Add Alert Email button in the lower right corner of the Static Alert Email Address table.

Add New Alert Email Address				
	Address mkeeler@timeips.com			
	OK Cancel			

• Enter the Email Address and click the OK button.

Static Alert Email Addresses					
▲ Address	Note	Delete			
mkeeler@timeips.com	Company admin address.	×			
		100 \$			
\bigtriangledown	Add A	lert Email			

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.

	System Mes	sage Types Employee Recipients	Static Email Recipients
-	General System Messages	0	1
ſ	Employees Static Email Addresses		
	Available Employees	Employees rece	eiving these messages.
	Backup, Joey Boresow, Patty Keeler, Matthew M. Seinfeld, Jerry	4	8
	"Available Employees" are employees with permission to Edit th	he permission item System Set	tings.
		5	Revert Row 🔒 Save Row
	Successful Backup Notices	0	1
۲	Backup Failure Notices	0	1
۲	Offsite Backup Completion	0	1
	System Updates Available	0	1
	System Update Errors	0	1
۰	UPS Power Failure	0	1
	UPS Power Restored	0	1
۲	Backup Size Exceeded	0	1
	Backup Size Approaching Capacity	0	1
۲	RAID Failure	0	1
۲	Clock Network Monitoring Alerts	0	1
\bigtriangledown			100 \$

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 Administrators » 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
- If an employee listed in the left column needs to receive unit spect in costage, each of the receiving the 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.

	System Me	essage Ty	pes	
	🔺 Message Type		Employee Recipients	Static Email Recipients
	General System Messages		0	1
[Employees Static Email Addresses			
	Available Addresses		Addresses receiv	ing these messages.
		•	mkeeler@time	ips.com
			S Re	evert Row 🛛 🔒 Save Row
(#)	Successful Backup Notices		0	1
	Backup Failure Notices		0	1
	Offsite Backup Completion		0	1
	System Updates Available		0	1
	System Update Errors		0	1
۲	UPS Power Failure		0	1
۲	UPS Power Restored		0	1
۲	Backup Size Exceeded		0	1
۲	Backup Size Approaching Capacity		0	1
۲	RAID Failure		0	1
۲	Clock Network Monitoring Alerts		0	1
\bigtriangledown				100 🗘

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
- If an email address is listed in the right column inclusion 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

Syste	em Settings	
Message Configuration		
System Management	Registration Number	167296-30699
DST Config	Serial Number	A13245S3000000
Time & Date	Enable Remote Service	Enable Remote Service
System Mail Settings	Restart Server	Restart Server
PHP Memory Settings	Restart Server Network	Restart Server Network
UPS Power Management	Shutdown Server	Shutdown Server
RAID Network Configuration IPSDBRO Database	Save Changes	Save Registration Number
Configuration		

• Click on the UPS Power Management tab to the left.

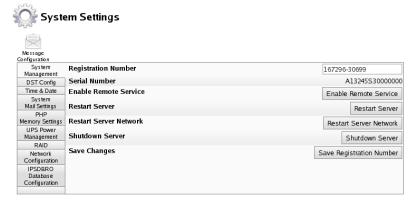
UPS Power Management

-					1
System Management	Your UPS is currently connected to) main power.			
DST Config	UPS Type		dumb	0	
Time & Date	UPS Cable Type			-	
System	UPS Cable Type	Serial 940-0020C		0	
Mail Settings	Notify of Power Loss After			0	
PHP Memory Settings			6 Seconds	~	
UPS Power	Automatically Shut Down After	10 Minutes		0	
Management		Tormates		<u> </u>	
RAID	Save Changes	Updat	e UPS Setti	ngs	
Network					
Configuration IPSDBRO					
Database					
Configuration					
1 Dive Time	IDC into the UDC douing and Time IDC has been averable about do				
	PPS into the UPS device once TimeIPS has been properly shut do to down your TimeIPS system by clicking on the Shutdown Serv		Managemen	nt tab	of the page
u. 5110	a down your miner o system by clicking on the onatoown och	er battom in the bystern	nanagemen		
NOTE:	Wait until the system completely shuts down, indicated by	, the small LCD display	turning of	ff.	
	olug the power cord from the wall and wait at least 60 seconds.				
c. Plug	g the power cord into the UPS device and TimeIPS will restart.				
	If TimeIPS does not start the boot process after plugging completely from the motherboard and reset capacitor.	the power cord into the	e UPS devi	ce, u	nplug the power cord and wait at least 60 seconds so the power can
1.0	The IDC has a sharehold with the hold of t				0.11
	the TimeIPS has completed booting back up, which may take up to UPS Cable Type, Notify of Power Loss after time frame, an				
	S Cable Type pull-down includes all supported APC brand cable		own time i	lame	In the pull-downs.
	· · · · · · · · · · · · · · · · · · ·				
NO.	TE: Be sure to indicate the exact model number found on t	he cable.			
		notify all employees with	System Ad	Iminis	strator security of the power loss via email and through the TimeIPS My
	sages section. tomatically shut down indicates when TimeIPS should be shut	down offer newer loca			
	comatically shut down indicates when TimeIPS should be shut	down after power loss.			
	te: The "When the battery is low" setting does not work w wn when the battery is low or when the "Automatically sh				es. All other devices will automatically shut the TimeIPS system r comes first.
3. Click on t	he Update UPS Settings button to save the changes.				
Internal Infor	mation (visible to Administrators only):				
NOTE: To conr	nect a UPS to the series 2 system the customer will need t	o use a usb hub. It wou	uld be pref	erabl	le that the hub be powered.

Redundant Storage Status

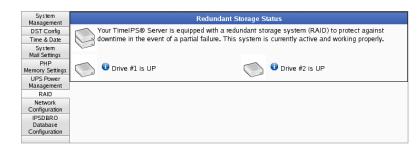
The Redundant Storage Status section shows the current status of the Redundant Storage hard drives.

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.

System Management	Redundant Storage Status			
DST Config	Your TimeIPS® Server is equipped with a redundant storage system (RAID) to protect against			
Time & Date	downtime in the event of a partial failure. Your TimeIPS® redundant storage is in need of service.			
System	Please click "Resynchronize" to attempt to activate the non-operating drive. If the synchronization			
Mail Settings	does not complete, or if you have any questions, please contact our Technical Support department at			
PHP	(316) 264-1600.			
Memory Settings	Drive #2 is DOWN			
UPS Power				
Management	Orive #1 is UP Resynchronize			
RAID				
Network Configuration	Synchronization Progress:			
IPSDBRO	en/			
Database	0%			
Configuration				

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

Or Syste	em Settings	
Message Configuration		
System Management	Registration Number	167296-30699
DST Config	Serial Number	A13245S3000000
Time & Date	Enable Remote Service	Enable Remote Service
System Mail Settings PHP	Restart Server	Restart Server
Memory Settings	Restart Server Network	Restart Server Network
UPS Power Management	Shutdown Server	Shutdown Server
RAID	Save Changes	
Network Configuration	Save changes	Save Registration Number
IPSDBRO Database Configuration		

• Click on the Network Configuration tab to the left.

Network Configuration

System Management	Addressing Method	Static Address 🗘
DST Config Time & Date	IP Address	192.168.168.189
System	Subnet Mask	255.255.255.0
Mail Settings PHP	Default Gateway	192.168.168.1
Memory Settings UPS Power Management RAID Network	DNS Servers	Primary 192.168.168.201 Secondary 8.8.8.8
Configuration IPSDBRO	Clock Access Port	
Database Configuration	Confirm Network Changes	Confirm
	Save Changes	Update 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.

- 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
- 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 If you result you must be decisible to access the much binded added through a matchadard port, for matched do to network port restrictions or number between 1 and 65535 here.
 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 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

🖌 System Settings

\mathbf{x}		
Message Configuration		
System Management	Registration Number	
DST Config	Serial Number	A08000S25501934
Time & Date System	Enable Remote Service	Enable Remote Service
Mail Settings PHP	Restart Server	Restart Server
Memory Settings	Restart Server Network	Restart Server Network
Database Configuration	Shutdown Server	Shutdown Server
comgaration	Save Changes	Save Registration Number

• Click on the IPSDBRO Database Configuration tab to the left

System Management	Limited Remote Database Username	readonly
DST Config	I imited Remote Database Rassword	
Time & Date		
System Mail Settings	Save Changes	Update Database Configuration
PHP		
Memory Settin	gs	
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: 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

- Fach module provides a license for one additional TimeIPS division

- 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 division 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.
 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 payroll or the 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

Com	pany/Divisions			
		Add a New Division		
			Show Inac	tive Divisions
	Division Name		Domain Name/Remote Login URL Identifier	
	Keeler Co. (Top Level Division)		yourdiv.example.com	
	Programmers		programmers (URL Identifier)	
	Seinfeld		seinfeld (URL Identifier)	
\bigtriangledown				100 \$

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.

=	Add a N	ew Division	
Division Name	Programmers	Manager	Keeler, Matthew M. 🝷
	programmers	Domain Name	
Remote Clock/Login URL Identif	ier		
	Descr	iption	
	Create	Division	
		censes are in use.	
	2 OF TO DIVISION LI	censes are in use.	
			🗆 Show Inactive Divisions

- 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 Remote Clock/Login URL Identifier is used to unquery location on charge because and 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

	Division Name	Domain Name/Remote Login URL Identifier
-	Keeler Co. (Top Level Division)	yourdiv.example.com
Company Info	Company Name	Keeler Co.
General		
Domain URL	Company Name (no HTML)	Keeler Co.
Managers		
Employees		
Clocks		
Settings		
Directory		
Security		
Login		
Errors		
Alerts		
Time Edit		
Appearance		
Page Titles		
New Employee Defaults		
Employee Default Settings		
Alternate Login		
Cleanup		
	1	🔊 Revert Row 🛛 🔚 Save Row

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

	🔺 Division Name	Domain Name	√Remote Login URL Id	entifier	
	Keeler Co. (Top Level Division)	your	div.example.com		
Company Info	Division Name:		Keeler C	0.	
General	- · · ·				
Domain URL	Description	Top-level divisi	on		
Managers	System Message Sender E-mail		mkeeler	@timeips.co	m
Employees	Time Zone				
Clocks	Time zone	CST - Central Time (A	utomatic DST)		0
Settings	Division Payroll Code				
Directory	Division Fayion Code				
Security	Require Login to View Company Docum	ents		Required	0
Login			Ľ	equireu	
Errors					
Alerts					
Time Edit					
Appearance					
Page Titles					
New Employee Defaults					
Employee					
Default					
Settings					
Alternate Login					
Cleanup					
			🔊 Revert Row	ave Save	ROW

- 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 "Required" from the drop down list. Otherwise, select "Unrequired".
 Be sure to click on the Save Row button if any changes are made.

Domain URL

	🔺 Division Name	Domain Name/Rem	ote Login URL Ide	entifier	
	Keeler Co. (Top Level Division)	yourdiv.e	example.com		
Company Info	Remote/Login URL Identifier				
General					
Domain URL	Domain Name		yourdiv.e	xample.com	
Managers	Use Domain Name to Log In.			Enabled	\$
Employees	_			Lilabled	× 1
Clocks					
Settings					
Directory					
Security					
Login Errors					
Alerts					
Time Edit	-				
	-				
Appearance	-				
Page Titles	-				
New Employee Defaults					
Employee Default Settings					
Alternate Login					
Cleanup					
					_
		(2)	Revert Row	🔒 Save R	.ow

• 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

(Joidision - yourdiv for the technice lock of a feature of this division was yourdiv for head of the technice lock in using chief. In the physical work in the physical of the ph

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/

- 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.
 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 <u>Employees » Permissions</u> » Division Managers » Employees and Modify Permissions tabs.

	🔺 Division Name	Domain Name/Remote Login URL Identifier	
	Keeler Co. (Top Level Division)	yourdiv.example.com	
Company Info	Possible Division Managers	Division Managers	
General	Backup, Joey		
Domain URL	Keeler, Matthew M.		
Managers	Reeter, Matthew M.		
Employees			
Clocks		A A	
Settings			
Directory			
Security			
Login Errors			
Alerts		<u>`</u>	
Time Edit	"Possible Division Managers" are employees w	ith the permission item "Can be selected as a Division Manager"	
Appearance		ager" permission group. Permissions can be configured to allow	
Page Titles	special authority if needed.	······································	
New Employee Defaults			
Employee Default Settings			
Alternate Login			
Cleanup			
		Revert Row 🛛 🔒 Save Row	

- 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.

	🔺 Division Name		Domain Name/Remote Login URL Iden	tifier
	Keeler Co. (Top Level Division)		yourdiv.example.com	
Company Info	Backup, Jœy	Boresow, Patty	Keeler, Larry	
General				
Domain URL	Keeler, Matthew M.	Lierz, Ken	Lierz, Whitney	
Managers	Tatro, Betty	Wolf, Hannah	Wolf, Jad	
Employees				
Clocks				
Settings				
Directory				
Security				
Login Errors				
Alerts	1			
Time Edit				
Appearance				
Page Titles				
New Employee Defaults				
Employee Default Settings				
Alternate Login	1			
Cleanup	-			
			Severt Row	🔒 Save Row

Clocks

	🔺 Division Name	Domain Name/Remote Login URL Identifier
-	Keeler Co. (Top Level Division)	yourdiv.example.com
Company Info	Not in this Division	In this Division
General		A00000512000000
Domain URL		A08000525500201
Managers		A10525512500420
Employees		
Clocks		Main Clocking Station
Settings		
Directory		
Security		
Login Errors		
Alerts	<u>``</u>	<u> </u>
Time Edit		
Appearance		
Page Titles		
New Employee		
Defaults		
Employee Default Settings		
Alternate Login		
Cleanup		
		🔄 Revert Row 🛛 🕁 Save Row

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

	Division Name	Domain Name/Remote Login URL Identifier
	Keeler Co. (Top Level Division)	yourdiv.example.com
Company Info	Phone Extension Digits	4
General		
Domain URL	Phone Extension Prefix	
Managers	Benefit Request Starting Time	12:00:00 AM
Employees	Preserve Work Order Data	
Clocks	Freserve work Order Data	Verserve 🗹
Settings	Retroactively Assign Job	
Directory	nanoualitaly (1551gli 505	Retroactively Reassign
Security	Holidays: Auto Observance Creation	14
Login Errors		Days After 🗘
Alerts	Holidays: Auto Event Creation	
Time Edit	nondays: Auto Event Creation	365
Appearance	Name Format	Last, First Middle 🗘
Page Titles		
New Employee Defaults	Middle Name Format	Initial 🗢
Employee Default Settings	End of Week Mailer Time Format	Show hours and minutes
Alternate Login	Select an image to be used for badges.	<u>^</u>
Cleanup	TIME	IPS
	Browse No file selected.	Save Logo Remove Logo
		🔊 Revert Row 🛛 🔒 Save Row

- 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.

- 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 the there will will be the theorement of the point of the system is a status of the sy
- 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

	🔺 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	Directory Page Company Info	<t< th=""></t<>
Security	Require Login to View Directory	Require
Login Errors	Show Last Clock Time (If Not Logged In)	Not Visible 3
Alerts		
Time Edit	Show Employee Status (If Not Logged In)	Not Visible 🗘
Appearance		
Page Titles		
New Employee Defaults		
Employee Default Settings		
Alternate Login		
Cleanup		
		Revert Row 🛛 🔒 Save Row

- Information shown on the initial <u>Directory page</u> 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 "Required" 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 permission satting.
 To allow all employees to view the directory can be directory can any bit but being 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 denote the directory concellation and the directory concellation are approximated to the directory option.
- 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

	🔺 Division Name	Domain Name/Remote Login URL Iden	ntifier
)	Keeler Co. (Top Level Division)	yourdiv.example.com	
Company Info	Password Time Limit		
General			
Domain URL	Enable Page Logging		Log 🗘
Managers	Batala La sa		
Employees	Retain Logs	30	
Clocks	Show/Hide System-wide settings		Hide 🗘
Settings			Tide V
Directory	Logins: Allow "Remember Me" Option	F	Remember Me
Security			Nemeniber Me
Login			
Errors			
Alerts			
Time Edit			
Appearance			
Page Titles			
New Employee Defaults			
Employee			
Default Settings			
Alternate Login			
Cleanup			
L	1	Revert Row	Save Row

- 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 Settings** 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.

Log	in	Er	ro	rs
LUg				

	🔺 Division Name	Domain Name/Remote Login URL Identifier
-	Keeler Co. (Top Level Division)	yourdiv.example.com
Company Info	Login Error Message	Invalid username or password
General		Invalid username of password
Domain URL		
Managers		
Employees		
Clocks		
Settings		
Directory		
Security	Login Permission Denied Error Message	You do not have permission to log in to
Login Errors		the web interface.
Alerts		
Time Edit		
Appearance		
Page Titles		
New Employee Defaults	Incorrect Division Specifier Login Error M	essage Please check that you have supplied
Employee Default Settings		the correct division specifier.
Alternate Logi	1	
Cleanup		
		Revert Row 🛛 🖶 Save Row

- 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

	🔺 Division Name	Domain Name/Remote Login URL Identifier	
	Keeler Co. (Top Level Division)	yourdiv.example.com	
Company Info	Send new employee alerts to:		
General			_
Domain URL	New employee alert template:	Use default template	0
Managers	Send employee log alerts to:		_
Employees	Send employee log alerts to.		
Clocks	Employee log alert template:	Use default template	0
Settings		Ose deludit temptate	<u> </u>
Directory	Send employee change alerts to:		
Security	Employee change template:		-
Login	Employee change template.	Use default template	ç
Errors	Send timesheet approval revocation alerts to:		
Alerts			
Time Edit	Timesheet revocation template:	Use default template	\$
Appearance			
Page Titles	Empty End-Of-Week email notices:	Send	0
New Employee Defaults			_
Employee	Send Offline Event notices:	Send	0
Default			
Settings			
Alternate Login			
Cleanup			
			_
		Revert Row 🕞 Save R	-
		- Neven Row E Save R	544

- 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 'Wew/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. Ther 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.
 When an employee's timesheet has been approved but then later invalidated due to oediting, an alert is sent to the managers who approved the time. However, an additional alert can also be sent to another address. Ther 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.
- Choose micro of the contraction of the con

Time Edit

Company Info General Warn if editing time in the past: Domain URL Warn if editing time in the future: Managers Warn if editing time results in excess duration: Employees Clocks Settings Warn if editing time results in excess difference between paid time. Directory Show "Real Time" in addition to "Paid Time" in Time Edit Security Login Errors Alers Time Edit Appearance Page Tites New Employee	24
General Warn if editing time in the future: Warn if editing time results in excess duration: Employees Clocks Settings Warn if editing time results in excess difference between paid time. Show "Real Time" in addition to "Paid Time" in Time Edit Login Errors Akens Time Edit Appearance Page Titles New Employee Default Employee	1 24
Domain URL Managers Warn if editing time in the future: Managers Warn if editing time results in excess duration: Employee Warn if editing time results in excess duration: Clocks Settings Directory Show "Real Time" in addition to "Paid Time" in Time Edit Login Warn on time overlap Airts Time Edit Appearance Page Tates New Employee Employee	1 24
Wanagers Warn if editing time results in excess duration: Employees Clocks Clocks Settings Directory Show "Real Time" in addition to "Paid Time" in Time Edit Login Warn on time overlap Aterts Time Edit Page Titles New Employee	
Employees Clocks Settings Directory Security Login Errors Alerts Time Edit Appearance Page Tites New Employee Default	
Clocks Warn if editing time results in excess difference between paid time. Directory Show "Real Time" in addition to "Paid Time" in Time Edit Security Uogin Login Warn on time overlap Alers Time Edit Appearance Page Titles New Employee Defaults	
Settings Warn if editing time results in excess difference between paid time. Directory Show "Real Time" in addition to "Paid Time" in Time Edit Login Warn on time overlap Arns Time Edit Appearance Page Titles New Employee Defaults	
Directory Show "Real Time" in addition to "Paid Time" in Time Edit Login Errors Alers Time Edit Appearance Page Tites New Employee Defaults Employee	4
Security Login Errors Akrts Time Edit Appearance Page Tites New Employee Defaults Employee	and "real time":
Login Errors Alerts Time Edit Appearance Page Titles New Employee Defaults Employee	Yes
Alerts Alerts Time Edit Appearance Page Titles New Employee Defaults Employee	fes
Alerts Time Edit Appearance Page Titles New Employee Defaults Employee	Yes
Time Edit Appearance Page Titles New Employee Defaults Employee	Tes
Appearance Page Titles New Employee Defaults Employee	
Page Titles New Employee Defaults Employee	
New Employee Defaults Employee	
Defauits Employee	
Default	
Settings	
Alternate Login	
Cleanup	

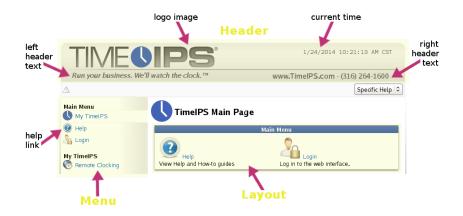
🔊 Revert Row 🛛 🔚 Save Row

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. 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" time and "real time" access 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, ward round can be easiled time. Specify the real time will be set to match the paid time.
When erating the set of the clock event is still needed for reporting. If set to "No" then, were redited warding 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.

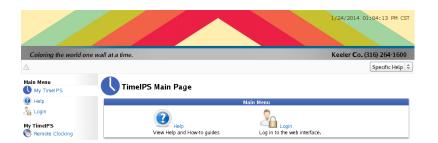
Appearance

	Division Name	Domain Name/Remote Login URL Identifier
Keeler Co. (Top Level Division)		yourdiv.example.com
Company Info	Left Header Text	Run your business. We'll watch the
General		clock.™
Domain URL		ciocki
Managers		
Employees		
Clocks		
Settings		
Directory		
Security	Right Header Text	<a< td=""></a<>
Login		href='http://www.timeips.com'>www.Tim
Errors		eIPS.com - (316) 264-1600
Alerts		
Time Edit		
Appearance		
Page Titles		
New Employee Defaults	Layout Style	Scaled \$
Employee Default Settings	Show Menu When Logged Out	Show Menu
Alternate Login	Help Text	Default 🗘
Cleanup		Derautt V
	Clock Color	fffff
	Browse No file selected. Select a logo image to use in the header. F 91 pixels tall. Use prig or jpg format.	Save Logo Remove Logo Recommended: 995 pixels wide by
		Save Row



	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	Left Header Text	Coloring the world one wall at a time.™		
Directory Security Login Errors Alerts Time Edit Appearance Page Titles	Right Header Text	Keeler Co. (316) 264-1600</a 		
Page Titles New Employee Defaults Employee Default Settings	Layout Style Show Menu When Logged Out	Scaled ≎ Scaled ≎ Show Menu		
Alternate Login Cleanup	Help Text Clock Color	Default ≎		
	Browse No file selected. Select a logo image to use in the header. R of pixels tall. Use png or jpg format.	Save Logo Remove Logo		
		Revert Row 🛛 🕞 Save Row		

- 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 <u>Help link</u> 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

	🔺 Division Name		Domain Name/Remote Login URL Identifier		
	Keeler Co. (Top Level Division)		yourdiv.example.com		
Company Info		Custom Page	Titles and Menu Names		
General		Re	set to Defaults	t to Defaults	
Domain URL			Main Menu		
Managers Employees	Menu Name	Custom Menu Name	Page Title	Custom Page Title	
Clocks	My TimeIPS	My TimelPS	TimeIPS Main Page	TimeIPS Main Page	
Settings	Directory	Directory	Employee Status	Employee Status	
Directory	Directory	Directory	Employee Status	Employee Status	
Security	Company				
Login Errors	Documents	Company Documents	Company Documents	Company Documents	
Alerts	Company Documents	Company Documents	Company Documents	Company Documents	
Time Edit	Help	Help	Help	Help	
Appearance Page Titles	Logout	Logout	neip	Theip	
New Employee			-		
Defaults	Login	Login	T. 150		
Employee Default	Menu Name	Custom Menu Name	My TimelPS Page Title	Custom Page Title	
Settings	My Messages	My Messages	My Messages	My Messages	
Alternate Login	My Work History	My Work History	My Work History	My Work History	
Cleanup My Schedule My Schedule My Timesheet My Timesheet My Benefit Requests My Benefit Requests		My Schedule	My Schedule		
		My Timesheet	My Timesheet		
		My Benefit Requests	My Benefit Requests	My Benefit Requests	
	My Settings	My Settings	My Settings	My Settings	
	Remote Clocking	Remote Clocking	Remote Clocking	Remote Clocking	
			Employees		
	Menu Name	Custom Menu Name	PageTitle	Custom Page Title	
	Employees	Employees	Employee Administration	Employee Administration	
	Organizational Units	Organizational Units	Organizational Unit Administration	Organizational Unit Admi	
	Departments	Departments	Department Administration	Department Administration	
	Sites	Sites	Site Administration	Site Administration	
	Selection Groups	Selection Groups	Selection Groups	Selection Groups	
	Custom Fields	Custom Fields	Custom Fields	Custom Fields	
	Reminders	Reminders	Reminders	Reminders	
	Permissions	Permissions	Permissions	Permissions	
Import/Export Import/Export		Employee Import/Export	Employee Import/Export		

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.

5		Division Name	successful accessed as a second
1		Keeler Co. (Top Level Division)	yourdiv.example.com
ŀ	Company Info	New Employee Defaults	
ŀ	General	These settings will be used as default values for all new em	
ŀ	Domain URL	employee is added, you can customize their settings and th	ey will no longer be affected by these default
ŀ	Managers	values.	
ŀ	Employees	New Employee Instructions	
ŀ	Clocks		
ŀ	Settings		
ŀ	Directory		
ŀ	Security		
	Login		
H	Errors Alerts		
ŀ			
ŀ	Time Edit	Default Employee Status	FT
ŀ	Appearance Dago Titlor	Default Accrual Group	Hourly
ŀ	Page Titles New Employee	•	Hourty
l	Defaults	Default Holiday Group	No Group 🗘
ŀ	Employee		No oreap
	Default	Default Sites	Clearwater
	Settings		Home Office
	Alternate Login		Thomas office
	Cleanup		Topeka / Lawrence
ĺ		Default Department	No Default Set 🗘
			No Denauti Set
		Default Organizational Unit	No Default Set 🗘
			no benate bet
		Default Shift	No Default Set 🗘
		Default Payroll Type	No Default Set 🗘
		Default Workweek Group	No Default Set 🗘
		Default Schedule Group	No Schedule Group 🗘
		Allow Remote Clocking	Not Allowed 🗘
		Allow PC Desktop Clocking	Not Allowed 🗘
		Benefit Approvals New and Imported employees will automatically have these Benefit Approval settings by default. Updating these setting will NOT update existing employees. Send emails when Benefit Requests are reviewed.	
		Email me when I work less than my scheduled day w	mail me when I work less than my scheduled wek using:
		using: Do not send an email 🗘	Do not send an email 🗘
		After 0 hours, automatically hours to 0)	deny 🗘 requests. (To deactivate, set
		Email Reminders: (Actual email address, or [email1], [email2], [email3], [Hours old Email addresse	
			Revert Row 🛛 🔒 Save Row

- te employee form.
- You can specify the Default Employee Status that all new employees. These these win be displayed on the cleate employees will be been to be the second that all new employees will be been to be the second that all new employees will be been to be the second the second the being 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.

- New employees will be automatically added to the selected Sites.
 You can specify the Department to be selected automatically 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 automatically 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 automatically 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 automatically 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 Bayroll Type to be selected automatically 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 Bayroll Type to be selected automatically 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 Bayroll Type to be selected automatically 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 automatically 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.

- The specified **Remote** Clocking setting will apply to new or imported employee 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*], [*e*

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.

	🔺 Division Name		Domain Name/Re	emote Login URL Id	entifier	
Keeler Co. (Top Level Division)			yourdiv	.example.com		
Company Info General Domain URL	neral These settings provide the default personal settings (My Settings) for all employees. Once an employee in URL customizes their personal settings, the defaults will no longer apply.					
Managers Employees	Login IP Verification Enable IP Verification			٢		
Clocks Settings			De	o not automati	cally refresh	٢
Directory						
Security Login	Send System Notifications to E-mail		Send Not	ifications to E-	mail	٢
Errors Alerts	Default Rows Shown In Tables				100 Lines	٢
Time Edit Appearance	Date Format		MM/DD/YY	YY (US Standa	rd)	٥
Page Titles New Employee	Time Format			09:59 F	PM (12 hour)	٢
Defaults Employee	Duration Format			HH:MM:SS (0	5:15:00)	٢
Default Settings	Preferred Time Zone			Company'	s Time Zone	٥
Alternate Login Cleanup Use Scaled Interface			Scaled	\$		
	Timesheets: Default View	Show	/ most recent	Completed p	ayroll period	٢
	Timesheets: Calculate Overtime			🗹 Ca	lculate Overti	me
	Inactive Employees				Hide	٥
	Active Employees				Show	٢
	Inactive Jobs				Hide	٢
	Active Jobs				Show	٢
	Employee Name Format		Na	ame Only		٥
	Show Help by Default			Show	all help	٢
	Show Warning for Unsaved Changes				Show	٢
			6	🤊 Revert Row	🔒 Save R	ow

- 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
- System notifications, which are notices about operational changes or actions needed in the TimeIPS system, can be sent to your E-m <u>Administration</u> 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 **Dates** presented in the system. (Not implemented in all areas.) Select the format which you would like to see **Dates** 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.

- Select the Default View for Timesheets when used with IPS APP Module.
 Check the Calculate Overtime to 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 Active Jobs on the Selection List.
 Choose to either hide or show Active Jobs on the Selection Lists.
 Choose to either hide or show Active Jobs on the Selection List.
 Choose to either hide or show Active Jobs on the Selection List.
 Choose to we 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. collapsing rows as in older version
- · So....be sure to click on the Save Row button if any changes are made

Alternate Login

	🔺 Division Name	Domain Name/	Remote Login URL Id	entifier
9	Keeler Co. (Top Level Division)	yourd	liv.example.com	
Company Info	Enable Alternate Login		None	0
General	j		None	~
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				
			🧐 Revert Row	🔒 Save Row

• Select an Alternate Login mechanism.

		🔺 Division Name	Domain Name/Remote Login URL Identifier
۲		Keeler Co. (Top Level Division)	yourdiv.example.com
		Programmers	programmers (URL Identifier)
	Company Info General Domain URL Managers Employees Clocks Settings Directory Security Login Errors Alerts Time Edit Appearance Page Titles New Employee Delauts Settings Alernate Login Actiliation Cleanup	Deactivating a division will c All licenses user Reactivating a division requires su All employees will be	use all aspects of the division to be inaccessible. I by the division will become available. fficient licenses to activate every aspect of the division. terminated and all payroll will be locked . eactivate this Division
			Revert Row 🔚 Save Row

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.
 C 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.

			Show Inactive Divisions	
		Division Name	Domain Name/Remote Login URL Identifier	
		Keeler Co. (Top Level Division)	yourdiv.example.com	
		Programmers	programmers (URL Identifier)	
		Seinfeld	seinfeld (URL Identifier)	
		test	test (URL Identifier)	
[Company Info	Rea	ctivate this division.	
	General	Payro	II will still be locked.	
- [Domain URL	Bea	ctivate this Division	
- 1	Managers	1400		
- 1	Employees			
- 1	Clocks			
	Settings			
	Directory			
	Security			
	Login			
	Errors			
	Alerts			
	Time Edit			
	Appearance			
	Page Titles			
	New Employee Defaults			
	Employee Default			
	Settings			
	Alternate Login			
	Activation			
	Cleanup			

• Reactivating a division requires sufficient licenses to activate every aspect of the division.

Cleanup

🔺 Division Name		Domain Name/Remote Login URL Identifier		
Keeler Co. (Top Level Division)		yourdiv.example.com		
Company Info	Terminate Inactive Employees After Days	5		
General	Dank Taminata Fu	nployees In The Following Groups		
Domain URL	Don't Terminate En	npioyees in the Following Groups		
Managers	🗹 Full Access	Managers		
Employees	Employee Administrators	System Administrators		
Clocks	Employee Administrators	System Auministrators		
Settings	Payroll Administrators	Division Managers		
Directory		Site Managers		
Security	Employees	Site Managers		
Login Errors	🗌 Job Managers	Site Supervisors		
Alerts	Department Administrators	Piecework Administrators		
Time Edit	Job Administrators	Pawn		
Appearance				
Page Titles	C Keeler Co Managers			
New Employee Defaults				
Employee Default Settings				
Alternate Login				
Cleanup				
		🔊 Revert Row 🛛 🔓 Save Row		

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

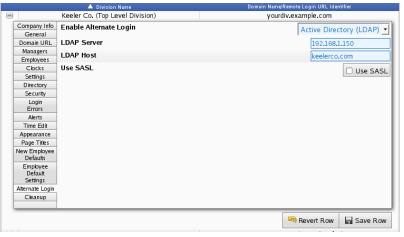
Co	mpany/Divisions	
	Ado	a New Division
		□ Show Inactive Division
	Division Name	Domain Name/Remote Login URL Identifier
	Keeler Co. (Top Level Division)	yourdiv.example.com
	Programmers	programmers (URL Identifier)
	Seinfeld	seinfeld (URL Identifier)
\bigtriangledown		100 \$

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.

	🔺 Division Name	Domain Name/Remote Login URL Ider	ntifier
	Keeler Co. (Top Level Division)	yourdiv.example.com	
Company Info	Enable Alternate Login	None	0
General		None	· ·
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			
		Revert Row	🔒 Save Row

• 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" 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.

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
 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

Sub Divisions		
	Add a New Sub Division	
		Show Inactive Sub Divisions
	Sub Divisions	Pay Code
	No Results Found	PayCode
\bigtriangledown		100 🗘

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.

	Add a New Sub Division
Name	Hopper Glass
Description	All work done for and only for Hopper Glass.
Pay Code	HopGla
Manger	No Manager
	Create

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

	Sub Divisions	Pay Code
	Hopper Glass	HopGla
General Settings	Managers Employees Clocks	
Name		Hopper Glass
Pay Code		HopGla
Description		All work done for and only for Hopper Glass.
Active		🗹 is Active
		🔄 Revert Row 🛛 🔒 Save Row
\bigtriangledown		100 🗘

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 <u>Employees » Permissions</u> » Division Managers » Employees and Modify Permissions tabs.

	Sub Divis Sub Division Name	ions	Р	ay Code
8	Hopper Glass		F	lopGla
General Settings Managers E	mployees Clocks			
Possible Sub Di	vision Managers	Sub Div	vision Manage	rs
Backup, Joey Keeler, Matthev	\$	Þ		~
"Possible Sub Division Mana,	gers" are employees with the permissi	on item "Can be selected as	a Sub Division I	Manager" set.
		E	Revert Row	🔒 Save Row

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

Provide the second se

Employees

Hopper Glass Hopper Glass Glocks Possible Sub Division Employees Keeler, Matthew	HopGla Sub Division Employees
Possible Sub Division Employees	Sub Division Employees
	Sub Division Employees
Keeler, Matthew	
Lierz, Whitney Tatro, Betty Keeler, Larry Lierz, Ken Boresow, Patty Wolf, Jad Wolf, Hannah	

- 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.

	Sub Division	; Pay Code
	Hopper Glass	HopGla
General Settings Managers Empl	oyees Clocks	
Clocks Not at This	Sub Division	Clocks at This Sub Division
Main Clocking Station A08000525500201 TimeIPS Master Server A10525512500420 A00000512000000		
A clock can only belong to one s associated sub division.	ub division at a time. Adding a clock to	a new sub division will remove it from any previously
		🔄 Revert Row 🛛 🔚 Save Row

- 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

SimelPS® A	dmin Interfac	e Logs				
		Log Display Op	tions			
From					02/03/2014 12:00:00 AM	
То					02/04/2014 12:00:00 AM	
Who			٩	All Visible Employ	vees In Keeler Co.	0
Pages				Automati Automati Backup A Batch Tin Benefits I Benefits I Benefits A	mport/Export _og Reporting	
		Display				
▲ Employee	Division	Web Log IP Address	Page	Date/Time	Admin Login	
		No Results Fou	Ind		100	٢

- 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.

▲ Employee	Division	IP Address	Web Log 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	
$\overline{\nabla}$, i i i i i i i i i i i i i i i i i i i		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

Updates	
Back	
TimelPS	9 Updates
The TimeIPS Update System downloads and installs regular sy website. A valid TimeIPS@ Update Account is required for regular syste Because system updates improve the quality and performance service.	m updates.
Update Options	Update Account
Automatic Updates: Click to enable automatic updates for your TimeIPS® Station.	Account Active until: 2030-01-01 View Available Update Features
Update Status	
Up to date: Your TimeIPS® system is up to date. To download and install any recently purchased modules, click the "Update Now" button.	Last Attempted Update Session [2 hours, 35 minutes ago] Statu for Last Update Session Updated Successfully Update Now

• 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^{1M} 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
 Additional 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.

- 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, a separate access URL can be provided for each division, and only employees belonging to the division can use the plote.
 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 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 be previded to a division.

- Division managers can be obsigned one of meanagers, when dee to a division model, the following meanagers can be completely customed.
 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

- Allows the creation and management of large numbers of loos
 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 of the employees

- or the employees. Each employees 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 Advanced Overtime module (IPSSCH) jobs can be set for each employee at scheduled times When used in conjunction with the TimeIPS Advanced Overtime module (IPSCH) jobs can be set as a 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 IPSIOB.

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 O 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

- Define Custom work weeks for employees.
 Track employee benefit usage.
 Automatically acrue 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



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
- Ote Summarized by Stephene Support and the special report of the special re 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 functio

- 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.
 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:

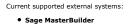
- Each module provides an additional site.
 Additional modules can be purchased for large installations with many sites.
 Each site can contain one or more TimeIPS clock stations.
 When used with remote clocking, sites can be defined by the IP address of the clocking computer.
 When used with telephone 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 can eschedule with bioinpum and maximum clocked in employees
- 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.
- Data in TimeIPS is always updated to match the data in the external system to neus in TimeIPS.
 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.



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



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.

٠ 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

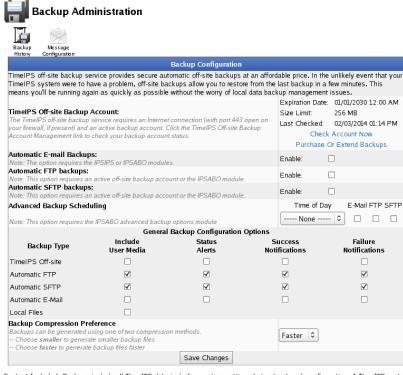
- TimeIPS Off-site backups require an active Off-site Backup Account. This can be purchased or extended by contacting your sales representative.
 Automatic and manual FTP/SFTP backups require either an active Off-site Backup Account or the Automatic Backup Options (IPSABO) module.
 Automatic E-mail backups 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 <u>Ports Used By TimeIPS</u> 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.

	Expiration Date:	01/01/2030 12:00 AM	
TimeIPS Off-site Backup Account:	Size Limit:	256 MB	
The TimeIPS off-site backup service requires an Internet connection (with port 443 open on your firewall, if present) and an active backup account. Click the TimeIPS Off-site Backup	Last Checked:	02/03/2014 01:14 PM	
Account Management link to check your backup account status.	Check	Account Now	

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

Automatic E-mail Backups:	Enable:	\checkmark
Note: The option requires the IPSIPS or IPSABO modules. If Automatic E-mail Backups are enabled, a backup will be e-mailed to the specified e-mail	Address:	admin@keelerco.com
address every night. Be sure your email server can handle large attachments.	Max Size:	8 MB

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

2

- 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

	Time of Day	Time of Day E-Mail FTP SF			
Advanced Backup Scheduling	03 AM - 04 AM 🗘] 🗹		☑	
Note: This option requires the IPSABO advanced backup options module	04 PM - 05 PM 🗘		\checkmark		
	None 🗘				

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

	General Backup Configuration Options				
Backup Type	Include User Media	Status Alerts	Success Notifications	Failure Notifications	
TimeIPS Off-site					
Automatic FTP	\checkmark	\checkmark	\checkmark	\checkmark	
Automatic SFTP	\checkmark	\checkmark	\checkmark	\checkmark	
Automatic E-Mail					
Local Files					

• 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.

Backup Compression Preference Backups can be generated using one of two compression n Choose smaller to generate smaller backup files Choose faster to generate backup files faster	nethods.	Faster 🗘	
	Save Changes		
Choose Smaller to generate smaller backup files	s.		

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

Recent Backup History					
Backup Type	Time	Elapsed Time	Size	Backed Up By	
TimeIPS Off-site	02/04/2014 12:14:36 AM CST	Unknown	732.3 K		
FTP	Never	Unknown	N/A		
SFTP	02/04/2014 02:30:29 PM CST	Unknown	ERROR, consult backup history		
E-Mail	02/04/2014 02:30:29 PM CST	Unknown	ERROR, consult backup history		
Local File	02/04/2014 04:07:20 PM CST	Unknown	733.9 K	Keeler, Matthew M.	
		View Full Back	up History		

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 Lick on at the top of the page.



		C <u>×</u>					
	ackup Message inistration Configuratio	Ckear n History					
um	instration computate	in History	Backur	History			
	Type	▲ Created By	Backup Start	Time To Make Backup	Time To Transmit	Size	Result
E)	SFTP	Automatic	02/04/2014 02:30 pm CST	Ohrs 00mins 00secs	Ohrs 00mins 00secs	0	Failed
Ð	Email	Automatic	02/04/2014 02:30 pm CST	Ohrs 00mins 00secs	N/A	0	Failed
H)	FTP	Automatic	02/04/2014 01:58 pm CST	Ohrs 00mins 05secs	2hrs 01mins 01secs	733.8 K	Failed
Ð	TimeIPS Off-site	Automatic	02/04/2014 12:14 am CST	Ohrs 00mins 05secs	Ohrs 00mins 12secs	732.3 K	Succes
Ð	TimeIPS Off-site	Automatic	02/03/2014 12:20 am CST	Ohrs 00mins 04secs	Ohrs OOmins 12secs	731.4 K	Succes
Ð	TimeIPS Off-site	Automatic	02/02/2014 02:40 am CST	Ohrs OOmins O5secs	Ohrs OOmins O7secs	731 . 1 K	Succes
Ð	TimeIPS Off-site	Automatic	02/01/2014 02:02 am CST	Ohrs 00mins 06secs	Ohrs 00mins 12secs	731.2 K	Succes
ŧ)	TimeIPS Off-site	Automatic	01/31/2014 12:37 am CST	Ohrs 00mins 04secs	Ohrs 00mins 13secs	731.3 K	Succes
Ð	TimeIPS Off-site	Automatic	01/30/2014 01:33 am CST	Ohrs 00mins 05secs	Ohrs OOmins 10secs	731.1 K	Succes
ŧ)	TimeIPS Off-site	Automatic	01/29/2014 01:15 am CST	Ohrs 00mins 05secs	Ohrs 00mins 12secs	729.9 K	Succes
+)	TimeIPS Off-site	Automatic	01/28/2014 12:51 am CST	Ohrs 00mins 04secs	Ohrs 00mins 07secs	729.7 K	Succes
t)	TimeIPS Off-site	Automatic	01/27/2014 12:37 am CST	Ohrs 00mins 04secs	Ohrs 00mins 12secs	728.9 K	Succes
ŧ)	TimeIPS Off-site	Automatic	01/26/2014 02:21 am CST	Ohrs 00mins 05secs	Ohrs 00mins 05secs	729 K	Succes
Ð	TimeIPS Off-site	Automatic	01/25/2014 01:38 am CST	Ohrs 00mins 05secs	Ohrs 00mins 06secs	729.3 K	Succes
Ð	TimeIPS Off-site	Automatic	01/24/2014 02:02 am CST	Ohrs 00mins 04secs	Ohrs 00mins 12secs	699.2 K	Succes
ŧ)	TimeIPS Off-site	Automatic	01/23/2014 01:04 am CST	Ohrs 00mins 04secs	Ohrs 00mins 09secs	699.1 K	Succes
Ð	TimeIPS Off-site	Automatic	01/22/2014 01:09 am CST	Ohrs 00mins 04secs	Ohrs 00mins 12secs	698.3 K	Succes
ŧ)	TimeIPS Off-site	Automatic	01/21/2014 03:15 am CST	Ohrs 00mins 04secs	Ohrs 00mins 09secs	697.8 K	Succes
ŧ)	TimeIPS Off-site	Automatic	01/20/2014 12:29 am CST	Ohrs 00mins 07secs	Ohrs OOmins 11secs	697.2 K	Succes
t)	TimeIPS Off-site	Automatic	01/19/2014 12:16 am CST	Ohrs 00mins 04secs	Ohrs 00mins 12secs	696.9 K	Succes
+)	TimeIPS Off-site	Automatic	01/18/2014 01:21 am CST	Ohrs 00mins 05secs	Ohrs 00mins 13secs	696.9 K	Succes
+)	TimeIPS Off-site	Automatic	01/17/2014 02:17 am CST	Ohrs 00mins 04secs	Ohrs 00mins 13secs	696.6 K	Succes
+)	Service	Automatic	01/16/2014 02:44 pm CST	Ohrs 00mins 06secs	Ohrs 00mins 00secs	695.8 K	Succes
•)	TimeIPS Off-site	Automatic	01/16/2014 02:15 am CST	Ohrs 00mins 06secs	Ohrs 00mins 02secs	695.9 K	Succes
+)	TimeIPS Off-site	Automatic	01/15/2014 03:27 am CST	Ohrs 00mins 04secs	Ohrs OOmins 11secs	695.6 K	Succes
+)	TimeIPS Off-site	Automatic	01/14/2014 12:56 am CST	Ohrs 00mins 05secs	Ohrs OOmins 10secs	694.4 K	Succes
E)	TimeIPS Off-site	Automatic	01/13/2014 01:35 am CST	Ohrs 00mins 05secs	Ohrs 00mins 13secs	694.2 K	Succes
E)	TimeIPS Off-site	Automatic	01/12/2014 12:24 am CST	Ohrs 00mins 06secs	Ohrs OOmins 11secs	693.8 K	Succes
+)	TimeIPS Off-site	Automatic	01/11/2014 12:16 am CST	Ohrs 00mins 06secs	Ohrs 00mins 09secs	693.6 K	Succes
E)	TimeIPS Off-site	Automatic	01/10/2014 05:16 am CST	Ohrs 00mins 05secs	Ohrs 00mins 14secs	693.8 K	Succes
+)	TimeIPS Off-site	Automatic	01/09/2014 12:36 am CST	Ohrs 00mins 04secs	Ohrs 00mins 10secs	694.1 K	
+)	TimeIPS Off-site	Automatic	01/08/2014 02:53 am CST	Ohrs 00mins 04secs	Ohrs 00mins 10secs	693.2 K	Succes
+)	TimeIPS Off-site	Automatic	01/07/2014 03:12 am CST	Ohrs 00mins 04secs	Ohrs 00mins 06secs	691.5 K	Succes
+)	Service	Automatic	01/06/2014 12:55 pm CST	Ohrs 00mins 09secs	Ohrs 00mins 00secs	689.9 K	Succes

To **Clear** your full backup history click on the Clear History V icon at the top of the Backup History page.

Restoring From A Backup

To restore from backup with the backup file follow directions in <u>Restore From Local Backup</u>. To restore from a TimeIPS Off-site backup follow directions in <u>Restoring an Off-site Backup</u>.

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.

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.

TimeIPS :: Time Clock, Attendance and Payroll So...

Data Reset

Data Reset
TimelPS 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.

 Restore Backup/Reset System

 To restore the system from a remote backup, from a local backup, or to completely reset and erase all TimeIPS data, you must first restore the system to factory defaults.

 CAUTION: Before you restore to factory defaults it is VERY IMPORTANT that you make a backup. When you restore your system to factory defaults, ALL information is cleared and reset. 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.

 Partial Data Reset
 Restore To Factory Defaults

 • Clicking the Restore To Factory Defaults button will bring up the following prompts.

 To event of obtaines: A lument of a construction for a backup when you rest of a construction of the system to factory defaults. This at

will erase all employees, time records, docu configuration data from your TimelPS syste cannot be restored unless you have a back you make a local backup before you procee you want to restore to factory defaults, click	uments, settings, photos and d em. Once erased, this data cup. We strongly recommend 2 ed. If you are absolutely sure
	Cancel OK
 If you are absolutely sure you want to Restore to Fact 	tory Defaults, click the OK button.

Are you SURE you want to restore to factor data. You MUST have a backup if you do no	
an FTD canvar	Cancel OK

• To really make sure you want to Restore to Factory Defaults, you will be asked again to confirm. Click the **OK** button to continue.

TimelPS® Station Restored to Factory Defaults		
This TimeIPS® Station has been successfully restored to factory defaults.		
Please allow about one minute for changes to system settings to take effect.		
Reconfigure TimelPSØ Server		

Once the Factory Defaults have been restored, click the Reconfigure TimeIPS Server button.
 For instructions on restoring, see the <u>Restoring from a Local Backup</u> 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].

- Accept the User's Agreement.
 O From the Setup screen, read the agreement and check the I accept these Terms and Conditions box at the bottom.
 O Then click the I agree, Restore from Backup button.

TimelPS Setup		
This sidebar will help	Welcome to TimeIPS	
	This TimeIPS system is ready to configure:	
Wizard. Look here for various tips and help when setting up your TimeIPS® system.	To configure as a TimeIPS Server:	
	Read the agreement and click the "Configure Server" button below.	
If you agree with the terms of the license agreement, please	To restore from a backup:	
click the appropriate button when you're ready.	To restore from a backup, read the agreement and click the "Restore from Backup" button below.	
	For additional help, call our Technical Support department at (316) 264-1600.	
	You must read and agree to the terms of the TimelPS License Agreement to continue. Please check the "I accept these Terms and Conditions" box at the bottom of the agreement. 21. MISCELLVHEODS. The application of the United Nations Convention of Contracts for the International Sale of Goods is expressly excluded. No provision of this Agreement shall be deemed waived unless such waiver shall be in writing and signed by TimelPS, Inc., or a duly authorized representative of TimelPS, Inc. You may not assign the benefits of this Agreement to any other party. 22. CUSTOMER CONTACT INFORMATION. To request information about TimelPS Software or TimelPS Hardware, please contact TimelPS, Inc., at Customer Support in writing or by electronic-mail at support@timelps.com, or by U.S. Mail to TimelPS, Inc. at 5445 E 85TH ST N, Valley Center, KS 67147-8707, ATTN: TimelPS Accounts.	
23. OTHER SOFTWARE RIGHTS. 23. OTHER SOFTWARE RIGHTS. 23. THE as additional separate works that are also included with TimeIPS that are not a part of TimeIPS. works are provided to you pursuant to their own license agreemental lows source code for these works are ftp://updates.timeips.com/ when the applicable license agreement allows source redistribution. This Agree provide you with A LICENSE TO USE any such separate work. THE TimeIPS SOFTWARE IS NOT I OTHER SOFTWARE THAT MAY BE LICENSED FROM TimeIPS, inc., UNDER THE GNU General Pub SIMILAR UICENSES. TO DETERMINE THE CONDITIONS AND LIMITATIONS OF YOUR RIGHT OTHER SEPARATE WORK, REFER TO THE LICENSE AGREEMENT INCLUDED WITH SUCH FWORK.		
	24. BINDING AGREEMENT. BY INSTALLING, COPYING, DOWNLOADING, ACCESSING OR OTHERWISE USING THE TIMEIPS SOFTWARE, YOU AGREE TO BE BOUND BY THE TERMS OF THIS AGREEMENT.	
	This is the end of the END USER TimeIPS SOFTWARE LICENSE AGREEMENT, TimeIPS HARDWARE AGREEMENT AND SERVICE AGREEMENT.	
	☑ I accept these Terms and Conditions.	
	By clicking either button below, you indicate agreement to the Terms and Conditions.	

5. Click on the Browse button and select the file you saved to your computer in step 1, then click on the Open button.

F	Restore System Options
	Local File Backup
	To restore TimeIPS from a local backup, click the "Browse" button below and select the file from your local computer. When you see the correct file listed in the box below, click "Restore From Local File".
	Browse 2014-02-04-16-07-20-WM.timelps Restore From Local File
	Off-site Backup Recovery
	Currently you have 439 backups stored on the TimeIPS® Secure Backup Server. However, there are no backups available for use in restoring a TimeIPS® Station.
	To release available backups, please call our Technical Support department at (316) 264-1600.
	Return to Setup Options

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 f "backup, backup". loyee record for

• 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 butchentication Key) and select Download Remote Backup.
 Have customer reter 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 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.
 - 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

Security Administration

Back

Create a New Certificate or Install an Exist	ing Certificate
Generate Self Signed Certificate or Certificate Signing Request (CSR)	
Organization Name: For example, the name of your company.	Keeler Co.
Common Name: This is the IP address or domain name used to access TimeIPS. If this is incorrect, your web browser may not accept the certificate.	asp.timeips.com
City:	
State or Province (Full Name): Use the full name of your state or province, NOT an abbreviation.	
Country Code: Use the two-letter code for the country your TimelPS® server is in. For example: US, CA, UK	US
E-Mail Address:	mkeeler@timeips.com
Expiration: How long your certificate will remain valid, in days. We recommend 3650 days (10 years).	3650 days
Install Existing Certificate	
Install Your Own Certificate: If you already have a signed X.509 certificate you wish to use, you may upload it here. The certificate and private key may not be encrypted with a password, they mus be in PEM format, and they must have the address of the TimeIPSØ server as their common name. If you provide a certificate, the fields above will be ignored.	Certificate: Browse No file selected. Private Key: Browse No file selected. Chain File:(optional) Browse No file selected.
Generate/Install Certificate and Enabl	e 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.

Security Administration

Your new certificate is being installed. Please wait one minute while settings take effect.

Service may be temporarily interrupted during this time.

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://

Security Administration

	Certificate Administration
Certificate Information	
Organization Name:	Keeler Co.
Locality:	Wichita, Kansas, US
Common Name:	asp.timeips.com
E-Mail Address:	mkeeler@timeips.com
Valid Between:	Feb 05, 2014 12:30 pm CST Feb 03, 2024 12:30 pm CST
Signing Authority	
Organization Name:	Keeler Co.
Lo cality:	Wichita, Kansas, US
Common Name:	asp.timeips.com
E-Mail Address:	mkeeler@timeips.com
	Revoke Certificate and Disable Security

If you chose to Generate a new certificate, your browser will alert you and ask you to acknowledge that you trust this certificate.

	This Connection is Untrusted		
	You have asked Firefox to connect securely to asp.timeips.com:29342 , but we can't confirm that your connection is secure.		
	Normally, when you try to connect securely, sites will present trusted identification to prove that you are going to the right place. However, this site's identity can't be verified.		
	What Should I Do?		
	If you usually connect to this site without problems, this error could mean that someone is trying to impersonate the site, and you shouldn't continue.		
Get me out of here!			
•	Technical Details		
	I Understand the Risks		
In Firefox, (lick on "I Understand the Risks".		
In Firefox, o	dick on "I Understand the Risks". This Connection is Untrusted		
In Firefox, o			
In Firefox, o	This Connection is Untrusted You have asked Firefox to connect securely to asp.timeips.com:29342, but we can't		
	This Connection is Untrusted You have asked Firefox to connect securely to asp.timeips.com:29342, but we can't confirm that your connection is secure. Normally, when you try to connect securely, sites will present trusted identification to		
In Firefox, c	This Connection is Untrusted You have asked Firefox to connect securely to asp.timeips.com:29342, but we can't confirm that your connection is secure. Normally, when you try to connect securely, sites will present trusted identification to prove that you are going to the right place. However, this site's identity can't be verified.		
In Firefox, e	This Connection is Untrusted You have asked Firefox to connect securely to asp.timeips.com:29342, but we can't confirm that your connection is secure. Normally, when you try to connect securely, sites will present trusted identification to prove that you are going to the right place. However, this site's identity can't be verified. What Should I Do? If you usually connect to this site without problems, this error could mean that someone		
y	This Connection is Untrusted You have asked Firefox to connect securely to asp.timeips.com:29342, but we can't confirm that your connection is secure. Normally, when you try to connect securely, sites will present trusted identification to prove that you are going to the right place. However, this site's identity can't be verified. What Should I Do? If you usually connect to this site without problems, this error could mean that someone is trying to impersonate the site, and you shouldn't continue.		
	This Connection is Untrusted You have asked Firefox to connect securely to asp.timeips.com:29342, but we can't confirm that your connection is secure. Normally, when you try to connect securely, sites will present trusted identification to prove that you are going to the right place. However, this site's identity can't be verified. What Should I Do? If you usually connect to this site without problems, this error could mean that someone is trying to impersonate the site, and you shouldn't continue. Get me out of here!		

If you understand what's going on, you can tell Firefox to start trusting this site's identification. **Even if you trust the site, this error could mean that someone is tampering with your connection.**

Don't add an exception unless you know there's a good reason why this site doesn't use trusted identification.

Add Exception...

• 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://

	Certificate Administration	
Certificate Information		
Organization Name:	Keeler Co.	
Lo cality:	Wichita, Kansas, US	
Common Name:	asp.timeips.com	
E-Mail Address:	mkeeler@timeips.com	
Valid Between:	Feb 05, 2014 12:30 pm CST Feb 03, 2024 12:30 pm CST	
Signing Authority		
Organization Name:	Keeler Co.	
Lo cality:	Wichita, Kansas, US	
Common Name:	asp.timeips.com	
E-Mail Address:	mkeeler@timeips.com	

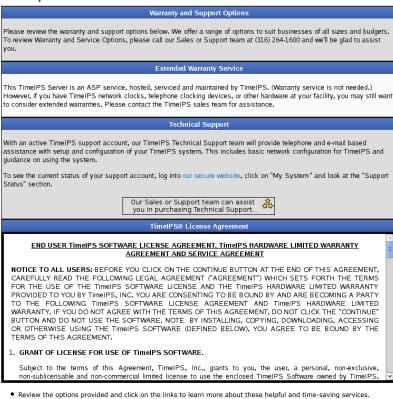
See Also: Modules/Upgrades

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



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: <u>Modules/Upgrades</u> <u>TimeIPS Store</u> <u>Getting Started wtih TimeIPS</u> <u>Warranty/Service</u> <u>External Sync</u>

TimeIPS Store

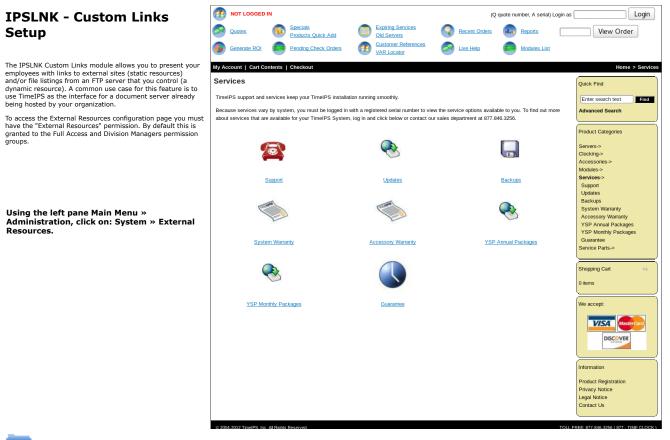
Using the left pane Main Menu » Administration, click on: System » TimeIPS Store

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



📕 External Resources

•	Add New External Resource	
		Show Inactive External Resources 🗆
	External Resources	Type
	No Results Found	type
\bigtriangledown		100 🗘

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

Ξ	Add New External Resource	
Name		401 K
	Submit	

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.

		External Resources
	🔺 Name	Туре
	401 K	Static (Link)
Settings Dis	play	
Name		401 K
Descriptio	n	Click here to access your 401 K account. You will need to log in using the username and password provided to you at hire by HR.
Active		🗹 Active
Туре		Static (Link)
Link		http://www.myFinancialInstitution.com/login/
		🔄 Revert Row 🛛 🔒 Save Row
		100

- 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.

			External Resour		
		▲ Name 401 K		Type Static (Link)	
	1	TOT IN	1	State (Entry	
_					
This is	how this n	esource is displayed to em	iployees.		
401 K				http://www.myFinancialInsti	tution.com/login/
		ss your 401 K account. You v ssword provided to vou at hii		the	
userna	ame and pa	sswora proviaea to you at nii	re by HK.		
				Revert Row	Save Row
				- neven now	La bare rom
					100

Dynamic Resource (FTP) Configuration

What follows is an example of the configuration of a dynamic FTP file listing.

	. External R	
۲	▲ Name 401 K	туре Static (Link)
	Pay Stubs	Static (Link)
Settings Display	,	
Name		Pay Stubs
Description		Your pay stubs from the last year are available here.
Active Type		Acti Dynamic (FTP)
FTP Server		192.168.1.63
FTP Port		
FTP Username		KeelerCo
FTP Password		•••••
FTP Toggle Passive	2	Toggle Pass
FTP Path		Payroll
Filename Filter		
File Sorting		Name 🗘 Ascending
Maximum Age (Day	s)	

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

	A Name	External Resources	Туре
+	401 K		Static (Link)
	Pay Stubs		Dynamic (FTP)
Settings Di	splay		
This is h	ow this resource is displayed to en	nployees.	
Pay Stub Your pay available	stubs from the last year are	Deleted Files 🗐 Last Updated:	02:02 PM 08/23/2012 :: Update No
		ay Stubs :: External Files	
(#)	Filename Payroll/1000-2012-02-15.pdf	Size 132.00 KB	Time 12:00 AM 02/20/2012
(±)	Payroll/1000-2012-02-15.pdf Payroll/1001-2012-02-15.pdf		12:00 AM 02/20/2012 12:00 AM 02/20/2012
(H)	Payroll/1002-2012-02-15.pdf		12:00 AM 02/20/2012
(H)	Payroll/1003-2012-02-15.pdf		12:00 AM 02/20/2012
(H)	Payroll/1004-2012-02-15.pdf		12:00 AM 02/20/2012
(H)	Payroll/1005-2012-02-15.pdf		12:00 AM 02/20/2012
	Payroll/1006-2012-02-15.pdf		12:00 AM 02/20/2012
(H)	Payroll/1007-2012-02-15.pdf		12:00 AM 02/20/2012
(H)	Payroll/1008-2012-02-15.pdf		12:00 AM 02/20/2012
(+)	Payroll/1009-2012-02-15.pdf		12:00 AM 02/20/2012
(*)	Payroll/1010-2012-02-15.pdf		12:00 AM 02/20/2012
(+)	Payroll/1011-2012-02-15.pdf	58.81 KB	12:00 AM 02/20/2012
	Payroll/1012-2012-02-15.pdf	636.63 KB	12:00 AM 02/20/2012
	Payroll/1013-2012-02-15.pdf	65.29 KB	12:00 AM 02/20/2012
	Payroll/1014-2012-02-15.pdf	37.08 KB	12:00 AM 02/20/2012
•	Payroll/1015-2012-02-15.pdf	192.99 KB	12:00 AM 02/20/2012
٠	Payroll/1016-2012-02-15.pdf		12:00 AM 02/20/2012
۲	Payroll/1017-2012-02-15.pdf		12:00 AM 02/20/2012
	Payroll/1018-2012-02-15.pdf		12:00 AM 02/20/2012
	Payroll/1019-2012-02-15.pdf		12:00 AM 02/20/2012
•	Payroll/1020-2012-02-15.pdf	156.14 KB	12:00 AM 02/20/2012
			100

Revert Row Save Row

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

🖗 Ex	ernal Sync
	🔺 Division
	Keeler Co. (Top Level Di
(H)	Brogrammers

_

	Programmers Seinfeld	
۲	Seinfeld	
	100	\$
\vee		

(ision

• Click the + (plus) sign to the left of the Division you want to sync.

	A Division
🖃 Keeler Co	. (Top Level Division)
General Employee Mapping Job Mapping	
Syncronization System	Sync with Sage Master Builder 🗘
Host/IP	192.168.205.1
Port	6035
Master Builder Company	
Master Builder User	
Master Builder Password	
Sync Frequency	6 Hours C
Sync Pay	Do Not Sync 🗘
Send Error Messages To	🕄 🛛 Backup, Joey 😂
	Last synchronization: Never Synchronize Now
	🔊 Revert Row 🛛 🔒 Save Row

• 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.

	🔺 Division		
	Keeler Co. (Top Level Division)		
General Employee Mapping Job Mapping			
		Create Default Mappings	Add Mapping
Master Builder Key	TimeIPS Employee Key		
		Revert Row	🔒 Save Row

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.

	▲ Division Keeler Co. (Top Level Divisio	on)	
General Employee Mapping Job Mapping	Receir co. (rop Eever Divisio		
		Create Default Mappings	Add Mapping
Master Builder Key	TimeIPS Employee Key		
LastName	nameLast	Edit Delete	
FirstName	nameFirst	Edit Delete	
MiddleName	nameMid	Edit Delete	
EmployeeStatus	status	Edit Delete	
Addr1	addr1	Edit Delete	
Addr2	addr2	Edit Delete	
City	city	Edit Delete	
State	state	Edit Delete	
PostalCode	zip	Edit Delete	
HomePhone	homePhone	Edit Delete	
Mobile	cellPhone	Edit Delete	
BirthDate	birthDay	Edit Delete	
HiredDate	startDate	Edit Delete	
Gender	gender	Edit Delete	
MaritalStatus	maritalStatus	Edit Delete	
		Revert Row	🔒 Save Row

To modify this list, click the Edit, Delete, or Add Mapping buttons.
Click the Save Row button to save any changes made.

479 of 529

	Division		
•	Keeler Co. (Top Level Division)		
General Employee Mapping Job Mapping			
		Create Default Mappings	Add Mapping
Master Builder Key	TimeIPS Employee Key		
		Revert Row	🔒 Save Row

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.

	🔺 Division		
•	Keeler Co. (Top Level	Division)	
General Employee Mapping Job M	lapping		
		Create Default Mappings Add M	lapping
Master Builder Key	TimeIPS Employee Key		
Name	name	Edit Delete	
ShortName	lcdName	Edit Delete	
ObjectID	code	Edit Delete	
Memo	description	Edit Delete	
DepartmentRef	subCode	Edit Delete	
		🔄 Revert Row 🛛 🔒 Sav	e Row

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.

- <u>Custom Data</u>
 <u>Divisions</u>
 <u>Clocks</u>

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



System D	ata Export
Export:	Custom Data Export Data
System Im	port/Update
Import/Update File:	Browse No file selected.
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.	No V
Import/Update Type:	Custom Data 💌
Import/Update Preprocessor:	None 🔽
Import/Update:	Import/Update
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.	
Tip: Export and re-import data to make large numbers of changes at one time.	1 Note: For instructions and details on import/export file formats, select All Help at the top right.

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.

System Data Export		
Export:	Custom Data	

 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 Curcenter Color OpenOffice Calc

A	В	C	D	E	F
Custom Key Name	Custom Key	Custom Value Nan	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

Adjust the spreadsheet as necessary.
 O 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

O 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.
 O 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.

System Import/Update					
Import/Update File:	Browse customData.csv				
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.	No				
Import/Update Type:	Custom Data				
Import/Update Preprocessor:	Kapayapaan 💌				
Import/Update:	Import/Update				
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.					
Tip: Export and re-import data to make large numbers of changes at one time.	1 Note: For instructions and details on import/export file formats, select All Help at the top right.				

- Once the file is created, click on the Browse button and navigate to the CSV file to be imported.
 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.
 Choose which type of data to Import/Update from the drop down list: Custom Data, Divisions, or Clocks.
 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.)
 Click on the Import/Update Data.
 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".

System Import/Export

Successfully updated custom Employee Name:Dave Jones Certification Level:3. Skipped 2 unchanged records.

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
- On the Employee Administration screen, click on your name to expand your record. Your Personal tab will display.
 Click on the Email tab.



- 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.
 Clock in or out to generate the e-mail alert.
- 5. Clock in of our 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.

ı 🖻	Help Men em Settings	U Specific Help
Message Configuration		
System Management DST Config Time & Date	Mail Server The outgoing SMTP server you would like the TimelPS® System to send mail throug The default port is 25; use "server.port" to specify a different port.	localhost th.
System Mail Settings PHP Memory Settings IPSDBRO Database Configuration	Email Link Configuration Some outgoing email will contain links pointing back to specific pages on this server email is always accessed from inside your network, select "Internal IP Address." If en your network, and/or you have a router/firewall with port forwarding configured, sele- the domain name under CompanyDivisions-JURL tab. NOTE: Some router/firewall internal access to an external IP with port forwarding. If this is the case for you, "Dom inside your network. In this case, select "Provide Both Links."	nail is accessed from outside ct "Domain Name" option and sei configurations do not allow
	Email Link Port Number If you use port forwarding to redirect external requests to your TimeIPS® Server, set port here so that links in E-Mails sent by this system will route properly. Secure Sockets Many mail servers require that SSL be used to send messages. Select this checkbon server requires that the TimeIPS® system use SMTP over SSL. Do not check this bo STARTTLS; support for STARTTLS will be automatically detected. Checking this box	x if your mail x if your mail server needs to use
	Disable STARTTLS Some mail servers report that they have support for STARTTLS, but in fact do not. If y see messages in the "View Errors" link below indicating an inability to connect to ser SMTP Username The username to log into the SMTP server above. Contact your System Administrato	rver, try checking this option.
	ISP for this information if needed. SMTP Password Passwor	
	Currently there are 0 unsent messages in the local mail directory. There are 0 messages that have failed to send but will be retried later.	Restart Mail System View Errors
	Save Changes Click this button to save your changes.	Update Mail Settings

Make sure to have either Specific Help or All Help showing. This option is available in the top right corner of any system page. 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

N

Wait 60 seconds then refresh the page. If there are still unsent messages, TimeIPS is unable to connect to the designated Mail Server.
 Check your DNS settings.

 Go to System > System Settings. View the Network Configuration section.

System Management DST Config	Addressing Method Select "Dynamic" to use DHCP or select "Static" to set a manual address.	Static Address
Time & Date	Currently set to DYNAMIC;	
System Mail Settings PHP Iemory Settings	IP Address The IP Address of the TimeIPSØ Server. MAC Address: 52:54:00:12:34:56	10.0.2.15
Network Configuration IPSDBRO Database	Subnet Mask The Subnet Mask of the TimeIPS® Server.	255.255.255.0
Configuration	Default Gateway The Default Gateway (Default Route) of the TimeIPS® Server.	10.0.2.2
	DNS Servers The Domain Name Service server for TimeIPS. Dynamic addressing may automaticall set/reset these values.	Priman 10.0.2.3 Secondary
	Clock Access Port If you need your TimeIPS clock stations to access the TimeIPS master station through nonstandard port, for instance due to network policy restrictions, enter a port number b	
	Confirm Network Changes I understand that incorrect network settings can interrupt the connection to the TimeIP: carefully reviewed my network settings and am ready to make changes.	S® server. I have Confirm
		Manage dialup connectivity
	Save Changes Up Click this button to save your changes.	date Network Configuration

b. Confirm with your network administrator that the DNS Servers are valid servers for your network. If necessary, change the DNS Server settings.

Check the "From" Address used for e-mail alerts.
 a. Go to System » Company/Divisions, General Tab

	Division Name	Domain Name/Remote	Login URL Identifier
	Keeler Co. (Top Level Division)	yourdiv.exa	mple.com
Company Info	Division Name:		Keeler Co.
General	The name of this division.		
Domain URL			
Managers	Description	Top-level division	
Employees	A brief description of, or slogan for this division.		
Clocks			
Settings	System Message Sender E-mail		mkeeler@timeips.com
Directory	Email messages sent by the system will appear	to be from this address.	
Security			
Login	Time Zone	CST - Central Time (Automa	tic DST)
Errors	The Time Zone that this company/division		,
Alerts	operates in.		
Time Edit			
Appearance	Division Payroll Code		
Page Titles	A company code that is unique to this division v	vhich can be included in payroll	
New Employee Defaults	exports.		
Employee	Require Login to View Company Documer	Its	Required 0
Default Settings	Employees must log in to view the company do	cuments	required
Alternate Login			
Cleanup			
		Re Series	evert Row 🛛 🔚 Save Row

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).

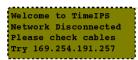
http://www.thedomainworks.com/smtp_settings.php

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 cause

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 assistan

- 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:



- Unplug the network cable from the back of the TimeIPS system and then plug it back in.
 Unplug the network cable from the source (ex: router, hub, personal computer etc...) and plug back in to the source.
 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.)

Welcome to TimeIPS	-Clock Not Set Up-	->Show Network Info	
Browse to http://	Search for Master	Sync to Master	
192.168.1.40	->Configure Network	Revert to DECP	
To configure	Clean Shutdown	Set IP Address	
192.168.1.40	->Configure Network	Revert to DECP	

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.)

- The LCD (or monitor) will display the version number, IP address, default gateway (GW) and the master server station (MST).
 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
 - 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].
 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.

- 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

A. 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

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 The wall/router configurations usually allow access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration. In locations with extremely tight network security, access to external sites without any special configuration to a different configuration technic and the security access to external sites without any special configuration to a different configuration technic and the security access to external sites without any special configuration to a different configuration technic and the security access to external sites without any special configuration to a different configuration technic and the security access to external sites without access to external sites without access to external sites without access to external sites without access to external sites without access to external sites without access

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 alternatevity 443 HTTPS) to 12.206.142.219 Required to download updates.
 80 (HTTP) to timeips.com (55.254.250.145) Recommended for faster update speeds.

- 53 (DNS) 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
 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 system

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
- So (Clock Connectivity) Required for Clock on haster Connectivity. For to ward required to ward bocks.
 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 OBI

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 (HTTP) to 75.48.191.220 and 75.49.191.221 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

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

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
- Ensure that there are no content filters or proxy devices between the clock network and the server network

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

Unplug all devices and cables from the clock.
 Plug in ONLY the power adapter and wait for up to 3 minutes for the display to initialize.
 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)

- 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.
 Unplug your TimeIPS system from the power cord and wait 60 seconds.
 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,
- Verify that Parallel Port Mode is set to EPP + ECP. Use the +/- keys to adjust it, if necessary.
 Press ESC key.
- Press F10 [Save and Exit].
 ENTER [OK].

Model Number 2XX

- 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. Unplug your TimeIPS system from the power cord and wait 60 seconds. Plug back in and immediately start tapping the delete key on the keyboard that you attached on back of TimeIPS. Go down 3 to Integrated Peripherals, press enter.
- 4.

- Go down 2 to Via SuperIO Device, press enter.
 Go Down 2 to Onboard Parallel Port and using the +/- keys set to 378/IRQ 7
 Go down one more to Onboard Parallel Mode and using the +/- keys set to ECP/EPP
 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]
- bown 5x [Uniboard Parallel Po 5. + [sets to 378 (or 378h)]
 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]
- Right arrow [Features Setup] 3. ENTER
- ENTER
 Down Arrow 3x [Onboard Parallel Port]
 + [sets to 378 (or 378h)]
 Down Arrow [Parallel Port Mode]
 [sets to EPP + ECP]
 ESC [Return to CMOS Utility]
 F10 [Save and Exit]
 ENTER [OK]

- 701 motherboard
 - 1. Delete [CMOS Utility] 2. Right arrow [Features Setup] 3. ENTER

 - Down Arrow 3x [Onboard Parallel Port]
 Down Arrow 3x [Onboard Parallel Port]
 Down Arrow [Parallel Port Mode]
 [sets to EPP + ECP]

 - 8. ESC [Return to CMOS Utility] 9. F10 [Save and Exit] 10. ENTER [OK]

Low Profile Systems

- Delete [CMOS Utility]
 Down Arrow 3x[Integrated Peripherals]
- ENTER
 Down A Down Arrow 2x [Via SuperIO Device]
- Down Arrow 2x [Via SuperIO Device]
 ENTER
 Down Arrow 2x[On board Parallel Mode]
 Using the +/- keys set to [378/IRQ7]
 Down Arrow [Onboard Parallel Mode]
 Using the +/- keys set to [CCP/EPP]
 ESC [Return to CMOS Utility]
 F10 [Save and Exit]
 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.

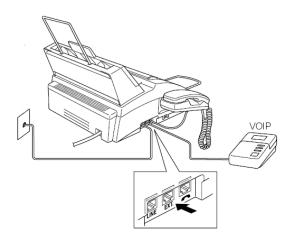
Connections

Plug the line from the wall jack into fax machine's jack labeled LINE.
 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.)

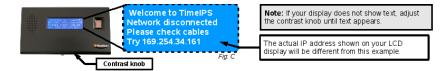


See Also: TimeIPS Telephone Clocking System

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:



- Check the physical network connection
- Unplug network cable from back of the TimeIPS system network port slot then plug it back in. You should hear it snap in place.
 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.
- 2. On plot previow cable inorm the source (ex. route), now, personal computer etc..., and plot pack into the source, now should near it shap in place.
 Make sure that you are using correct cable for your configuration (crossover cable if connecting directly to a standahone computer, patch cable if connecting to network).

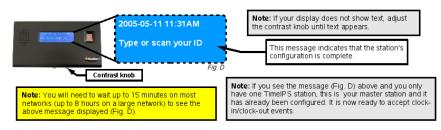
For TimeIPS Master Server:

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:



If the clock is still unsuccessful in locating the master server, please call our Customer Relations Department at 877.846.3256 for further assistance

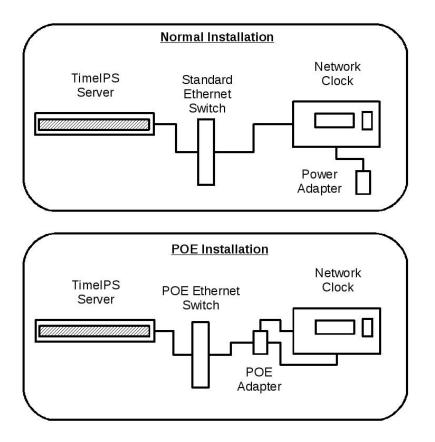
NOTE: After a clock has connected to a master server at least once, you will see the following display if the master server subsequently becomes unavailable.



* 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:

- o 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.
- switch from each direction.
 O Use a VDSL thermet 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"
 O Use a VDSL Ethernet switches with fiber capacity and fiber connections are available for lengths up to a mile or more.
 O 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.
 O 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
- A stock of count of the router in both and stock of 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:

- 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.
 Install the Router and Configure the Internal Network at the location of your Master Server.
 Install and Configure the TimeIPS Master Server.
- A Configure the noter at the Master Server's location to forward information it receives from the Internet to the LAN IP address of the Master Server.
 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 <u>pertforward.com</u> is a helpful resource that provides instructions on how to port forward many other routers. If you can not find the instructions on <u>portforward.com</u> please contact your router manufacturer for support and assistance.



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).
 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.

Applications					Wireles	s-G Broad	band Router	WRT54GL
Applications - & Gaming	Setup	Wireless	Securi	ity Access i		plications Gaming	Administration	Status
Ĩ	Port Range F	Forward	Port Trig	gering	DMZ Q	oS		
Port Range Forward							Port Range Fo	warding :
			Por	t Range			Certain applic require to oper	ations may n specific ports ir
	Application	Start	End	Protocol	IP Address	Enable		Inction correctly ese applications
	TimeIPS	3306 to	3306	Both 💌	192.168.1.50	~	online games.	When a reques when a reques
	TimeIPS	443 to	443	Both 💌	192.168.1.50	~	the Internet, the route the data	ne router will to the computer
	TimeIPS	80 to	80	Both 💌	192.168.1.50	~	you specify. Du concerns, you port forwarding	may want to lim
	TimeIPS	123 to	123	Both 💌	192.168.1.50	-	ports you are u	
		0 to	0	Both 💌	192.168.1.0		after you are fi More	
		0 to	0	Both 💌	192.168.1.0			
		0 to	0	Both 💌	192.168.1.0			
		0 to	0	Both 💌	192.168.1.0			
		0 to	0	Both 💌	192.168.1.0			
		0 to	0	Both 💌	192.168.1.0			

Click on Applications & Gaming.
 Type the name of the rule under Application (example TimeIPS).
 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 TimeIPS.
 Choose TCP from the drop down under Protocol.
 Enter your Master Server's IP address under IP Address.
 Put a clock mark in the Enable box.
 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.

491 of 529

😻 Set the TimelPS® Station IP Address and Master - Mozilla Firefox					
<u>File Edit View History Bookmarks Tools Help</u>					
👍 • 🗼 • 🥑 🛞 🏠 🕒 http://192.168.1.129/quickset_ip.php 🔹 🕨 💽 • Google	Q				
🕲 129 System 🔹 40 System 🚯 225 System 🚯 Secure 📄 TimelPS support					

Launch a web browser using a computer that is connected to the same router as the Clock.
 Type the Clock's IP in the address field followed by /quickset_ip.php (example: http://192.168.1.129/quickset_ip.php).

Set the IP address and Master TimeIPS® Station for this System				
Current Time: 2/19/2008 09:26 AM CST				
Currently, the workload on this station is: Low				
IP Address:	192.168.1.129	Dynamic Address (DHCP) 🦳		
Subnet Mask:	255.255.255.0			
Default Route:	192.168.1.1			
DNS Servers:	Primary: 192.168.1.1	Secondary: 68.94.156.1		
NTP Server: Running <i>details</i>	ntp.timeips.com	Restart NTP		
Check to keep designate	d the TimeIPS® Master as this stat	on's NTP Server		
Master TimelPS® Station	72.67.86.15	Only use this specified Master (never scan network for a Master)		
Restart the TimelPS	® Client Program:	Restart Client Program		
Restart the TimelPS® Station:		Restart Station		
Shutdown the TimelPS® Station:		Shutdown Station		
Test connection to t	he TimelPS® Master:	Test Connection to Mast		
Update the TimelPS Station:	® Software on this	Download Updates		
Clear the informatio TimelPS® Client pr		Clear Cache		
Serial Number:		A06029PS1401190		
Note: Current client version is 3.5.9. Clearing the "Master TimeIPS® Station" box will cause the TimeIPS® Station to become a client and rescan the network for a master station. Checking the "Dynamic Address (DHCP)" will cause the TimeIPS® Station to rescan the network for a new IP address.				
	Apply Changes			

5. Enter the IP address of the Master Server in the Master TimeIPS Station field.

- Enter the IP address of the Master Server in the Master TimeIPS Station field
 Put a check mark in the box marked Only use this specified Master.
 Click on the Apply Changes button.
 After a few seconds the Clock's Icd will display Restarting client please wait.
 It will then change to Searching for TimeIPS Master
 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 modern 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:

- Register an account on the **DynDNS** website located at <u>http://www.dyndns.com</u>
 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 runn 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).
- 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.

Check to keep des	ignated the TimeIPS© Master as this sta	tion's NTP Server
Master TimelPS® Station	example.dyndns.com	Only use this specified Master (never scan network for a Master)

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.

🔺 Fu	ll Name	ID/Badge	Employees Manager	Organizational Unit	Payroll Type	Status	bike transit
Boreso	w, Patty	1005	Lierz, Whitney	Family	Direct	FT	1
Required Personal Employment Pay	First Name: Middle Name SSN:	/Initial:	Patty	Last Name: Preferred Name: Birthday:	Boresow		
Biometrics Contact Emergency	Time Zone: Edit Photo]		Company Time 2	Zone		•
E-Mail Mis cellaneous Permis s ions Departments	Username: Password: PIN Number:		pboresow •••••• 1005	Verify Password: Require PIN: 🗹	Force Re-Regis	tration:	
Schedule Custom Burdened Rates Allocations	Login as thi	s Employe	2		-		
Payroll Tool Helper	-						
					🥱 Revert Row	a s	ave Row

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): O Have customer enter http://IP/admin/systemrecovery.php O TimeIPS CRM will need to go to http://192.168.1.208.81/admin/cs_passwordrecovery.php O 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 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:

- O True cross-platform compatibility: Easy to install and use on Windows, Mac and Linux
 O Excellent track record for security and stability
 O Compliance with web standards
 O 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.
- O 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
- If the system powers on (lights turn on and fans/HD are heard spinning), but nothing displays on the LCD:
 <u>Check the CMOS settings</u>.
- O 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 firming 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.

- In the event the clock loses connection to the server, the clock will continue to activate the relay rules.
 Ensure that the relay device is properly connected to the TimeIPS system. Refer to the Relay examples articles for diagrams.

- 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.
 If the relay rules were working and stopped, <u>adjust the clock's network information</u> 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.
 Use keypad service codes or the on-screen menu to test the relays.
 Contact <u>TimeIPS support</u> 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 O First reset your reader. This is nonlinary done by removing power to the non-the "ON" position), and re-connecting power.
 O If prompted on startup, reset all to defaults
 Normally the reset to defaults will allow communication to work at this point.
- Normally the reset to detaults will allow co...
 If not, follow the configuration steps below:

Configuration

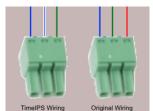
- O Enter command mode on the Hand Punch unit by pressing Clear and Enter on the keypad at the same time.
 O Enter 2 for the password and press Enter. This will enter the configuration menu.
 O Press the "* No" key until you reach the "Set Address" prompt. Then press the "# Yes" key.
 O The address should be set to "1"
 O Press the "* No" key until you reach the "Set R5-232" prompt. Then press the "# Yes" Key.
 O Press the "* No" key until you reach the "Set R5-232" prompt. Then press the "# Yes" Key.
 O 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.
 Claibrate 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

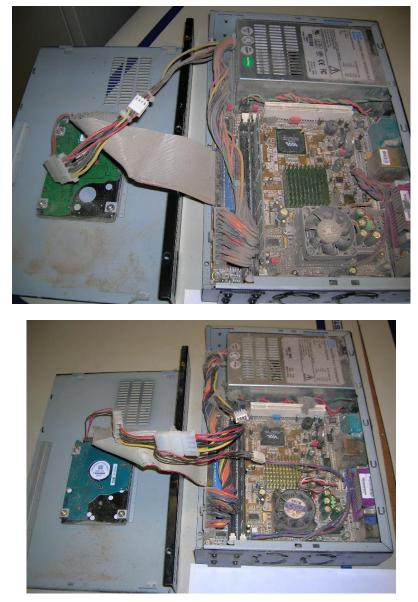
Periodic maintenance is crucial to prolonging the operation of your TimeIPS system. Simply removing the dust from your system can make a significant impact on its longevity. Dust and dirt will clog fans and heatsinks causing the components in your TimeIPS system to operate at a higher temperature than 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.



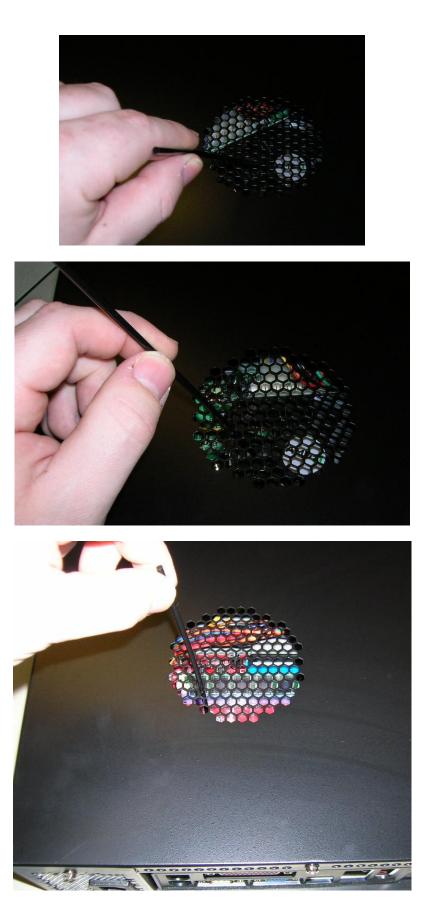


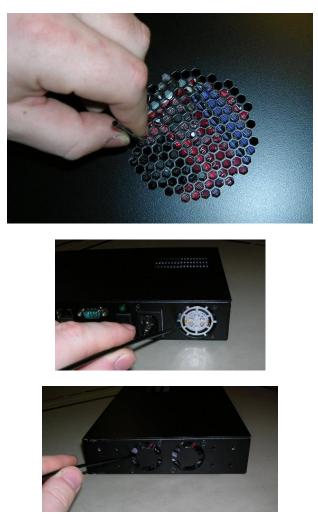
NOTE: Some models of TIMeIPS systems have a fan directly below the vent on the top of the system in the above image. If your TimeIPS system has a fan in this location DO NOT direct compressed air into this vent at this time.

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

O Phone: 800.440.1904
 Website: <u>http://drivesaversdatarecovery.com</u>
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: <u>http://datarecovery.net</u>

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: <u>http://www.salvagedata.com</u>

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 successful VM installations in the following host environments

- O VMWare O MS Hyper V
- O 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 -0 vmdk timeips.vmdk

VMDK files can be converted back to a raw IMG file with this command:

qemu-img convert timeips.vmdk -0 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 <u>Qemu</u>. 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.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 <u>VhdTool</u>. 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 (<u>http://wiki.gemu.org</u>) 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 (<u>www.macports.org</u>). Once I could execute the port command, I was able to use gemu with the following syntax: gemu-ing convert TimeIPS.rndk TimeIPS.ndk timENR timeIPS.ndk timeIPS.ndk tim

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 = <u>View Currently Clocked In Employees</u>

<u>Employee Status View</u> <u>Global Status Messages</u>

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

O Time Edits

Approving Time Sheets

O Time Sheet Approval

Approving Employee Benefits

O 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:

- Visit the <u>download area</u> and get the current version of the Employee's Guide to TimeIPS template.
 Review the document
- Customize the first page to address your employees and to include your company information
 Remove the sections that don't apply to your installation
- Proof the resulting document
 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.
 IPSDRA 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 <u>Remote Clocking</u> 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:

- O checkClock
 - Required: none
 Optional: format
 - Returns: Current server time
 - Side effects: none
 Example:

 - input: http://timeips/capi.php/checkClock?format=xml output: <time unix='ll68987689' 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

 - 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 lock events for the day Timestamp of the lock event in the day

 - Timestamps 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>129049200</todaysTimes> <todaysTimes>129049200</todaysTimes>

 - <todaysTimes> <times in="1290557619" out="1290557620" /> </todaysTimes>
 - <todaysTimes>1290557620</todaysTimes> </status>
- </status> O 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.ph/doClock/username=admin&password=timeips&format=xml output: <status name="Alpha, Alan" status="IN" worked="29556" remaining="114444" /> O clocki
- O 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¬e=Late output:<status name="Alpha, Alan" status="IN" worked="29556" remaining="114444" />
- O 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="0UT" worked="29556" remaining="114444" /> • changeJob ■ Required: credentials

- Required: credentials
 Optional: format, target, job, note, custom*

- Side effects: User changes jobs
 Example:
 input: http://timeips/capi.php/changeJob?username=admin&password=timeips&format=xml&job=140
 input: http://timeipsword=timeips&format=xml&job=140
 input: http://timeipsword=timeipsword=timeips&format=xml&job=140
 input: http://timeipsword=timeipsw
- 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" />
- o 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"
 - Languptriction construction getNonce

 - If the employee is in a different division, add division=<division code>. For example: http://timeips/index.php?username=asmithr&nonce=68b329da9893e34099c7d8ad5cb9c940&division=1234
- O 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:

 - dut: <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">
 </lock job="103"
 </lock job="103"

 - </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

- O 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
- o credentials:
 - This will uniquely identify and authenticate a user with scripting privileges who is performing the action.
 The required fields are "username" and "password".
- The required neus are username
 Itaget:
 May be specified by using a variable name as follows:

 A username (use targetHame or targetUsername)
 A badge number (use targetHD)
 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



Synchronize Now Last Synchronized: never Hot Schedules Login Information Client ID: 1 TimeIPS Schedule Configuration Match Employees By: First and Last Name S Synchronize Every: 10 Match Employees By: First and Last Name S Allowable Minutes Before: 15 Ø E-mail Schedule Violations Ø Deny Late Clock-In	Hot S	Schedules Import							
Client ID: 1 Store ID: 1 TimeIPS Schedule Configuration Match Employees By: First and Last Name Synchronize Every: 10 minutes Allowable Minutes Before: 15 Allowable Minutes After: 5 E-mail Schedule Violations Deny Early Clock-In	Synchronize Now	Last Synchronized: never							
TimeIPS Schedule Configuration Match Employees By: First and Last Name ▼ Synchronize Every: 10 minutes Allowable Minutes Before: 15 Allowable Minutes After: 5 ✓ E-mail Schedule Violations ✓ Deny Early Clock-In	Hot Schedu	Iles Login Information							
Match Employees By: First and Last Name Synchronize Every: 10 minutes Allowable Minutes Before: 15 Allowable Minutes After: 5 Image: Comparison of the synchronize Every: 10 Deny Early Clock-In	Client ID: 1	Store ID: 1							
Allowable Minutes Before: 15 Allowable Minutes After: 5	TimelPS Schedule Configuration								
E-mail Schedule Violations E-mail Schedule Violations	Match Employees By: First and Last Name 💌	Synchronize Every: 10 minutes							
	Allowable Minutes Before: 15	Allowable Minutes After: 5							
Deny Late Clock-In	🗹 E-mail Schedule Viol	ations 🗹 Deny Early Clock-In							
		Deny Late Clock-In							
Save Settings Save and Synchronize Now	Save Settings	Save and Synchronize Now							

TIP: The Last Synchronization displays at the top of the page.

Initial Configuration

- 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 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.
- o Clicking on Save Settings applies all HotSchedules settings (Allowable Minutes Before and After, E-mail Schedule Violations, and Allowable Minutes After) globally and immediately.
- O The Hot Schedules Import page can be accessed directly by browsing to the IP address and "/admin/HotSchedules.php."
- O 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 <u>Remote Clocking</u> 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 &FirstN20IName=Alan - ... &Sizec").

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>
- 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></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: ng extra parameters:

- o fordivisionname: Division is identified by name such as "Acme Company"
 o fordivisioncode: Division is identified by it's configured payroll code such as 2000
 o fordivisionid: Division is identified by it's TimeIPS generated unique ID such as 4
- O 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"</pre>

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.

- o presetID: The report to run. This can be found by running "getCustomReportPresets". This presetID must be accessible within the requested division.
 o 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.
 o 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.
 o end: The ending date/time for the report. Follows the same format as the start date/time.
 useEmployeeT2: 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 compared in the time one of each propose comparately.
- 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

```
&rcsetD=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) -->
                    <rows
<!-- Preamble column named "Foo" -->
<foo>Data for foo</foo>
<!-- Preamble column named "Bar" -->
                                </row>
</header>
             <body>
                       <row>
                                <!-- Column named "Employee Name" -->
<employee_name>Boris</employee_name>
<!-- Column named "Hours" -->
<hours>30</hours>
                                </row>
                      <row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
<row>
</row>

    converse of the test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of test of t
                                 <hours>40</hours>
<!-- Column named "Code" -->
                                 <column hamed Code
<code>303</code>
<!-- Unnamed column -->
<column>ST</column>
                       </row>
           </bdv
</bdv
<!-- Only included if using footer -->
<footer>
                      <row>
<!-- Footer column named baz -->
                                 <baz>Data for baz</baz><!-- Unnamed footer column -->
                       <!-- 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

"The second seco

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

- O Supports Employees, Passwords, Jobs and more

Programming Interface:

O 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:

O 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>

- vuser id="2" nameFirst="Test" nameMid="" nameLast="B" namePref="" fullName="B, Test" HID="2" username="b" pin="" mgrID="">
- </user>
 </user>
 </user>
 </user>
 </user>
- </users>
- 0 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

 - Required: Generations, newrassword
 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"
- chample: inder user admin wane to change the password to employee asmith input: http://tmeips/sapi.ph/setPassword?username=admin&password=timeips&targetUsername=asmith&newPassword=apple23&format=xml output: <setPassword success="1" /> 0 getNonce

 - Required: credentials
- Pequintel of Centrals
 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"
 Example: An automated system (with username "master") wishes to create a one-use password for employee "asmith" Example: An automated system (wind username inducer) wishes to create a onleruse password for employee asinitin
 input: http://tmiepis/saji.ph/getNonce?username=masterSpassword=anylknowsStargetUsername=asmith&format=xml
 output: <ronce value="68b329da9893e34099c7d8ad5cb9c940" />
 0 getHistory
 Required: credentials, rangeType {events|minutes|hours|days}, rangeLength
 Optional: format, target
 Returns: all time events and benefit/holiday usage for the specified range
 Celebration
 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> %125019/ <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" , <ut colspan="2"> </clock> <clock job="103"> cin 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> • aetJobs 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" /> </iobs> 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> </benefitTypes> 9 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' /> <name="blck" id="3' />
<current_level>6000000</current_level>
<total_lost>3600.000000</total_lost>
<total_earned>3600.000000</total_earned>
<prending_approval>3600.000000</pending_approval>
</benefits> O 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/> O getBenefitRequests • Required: credentials • Optional: format • Returns: Benefit Use Requests Side effects: none > Sloe PIPELS: none Example: input: http://timeips/sapi.php/getBenefitRequests?format=xml&username=admin&password=timeips output: <benefitRequests/> <benefitRequests/> <benefitRequest id="3" /> cbenefitRequests/> denefitRame>Vacation</benefitName> <ubclassMame>FMLAcVubclassName> <nameFirst>John</nameFirst> <nameLast> <nameLa <requestedAmount>7200</requestedAmount> <requestedAmount>/200</requestedAmount> <requestNote/> <usageDate>1265640600</usageDate> <creationDate>1265640618</creationDate> </benefitRequest> </br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/>
</br/> 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

readonly

Update Database Configuration

Master Configuration

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.

Limited Remote Database Username

Limited Remote Database Password

Management Limited Remote Database Password (confirm)

Click this button to save your changes.

Confirm the password.

user is used primarily for read-only access.

The username for remote database access such as from an ODBC-compliant application. This

Must be between 8 and 16 characters long (inclusive). Leave blank unless changing password.

Using the left pane Main Menu » Administration. click on: System » System Settings

System

Management

DST Config

Time & Date

System

Mail Settings

UPS Power

RAID

Network

Configuration

Click on the TPSDBRO Database Configuratoin tab

- Type in a password in the "Limited Remote Database Password:" field
- Retype the password in the "Limited Remote Database Password (again):" field
- 3. Click on the Update Database Configuration button

Database Access

Configuration Save Changes To access the database, you will need an ODBC driver compatible with your operating system. IPSDBRO Database

Visit the $\underline{MySQL}\ download\ page$ 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

- ousers 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's badge number
 nameFirst The employee's first name
 nameRif. The employee's preferred name (nickname)
 nameRif. The employee's last name
 mameId. The employee's last name
 mameId. The usersID of the employee is direct manager
 username The usersID of the employee uses to log into TimeIPS
 password A hashed password for logging into TimeIPS
 title The employee's title

bisername the obsername the enclose to tog ing into TimePr5 i password - A hashed password for logging into TimePr5 itite - The employee's title o 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 employee timeOut - The time the punch-in was created timeOut - The time the punch-in was created itimeOut - The time the punch-out time after all adjustments (rounding, snapping, editing) adjTimeOut - The paid punch-out time after all adjustments (rounding, snapping, editing) realTimeOut - The original/intended punch-in time without any adjustments (rounding, snapping, editing) realTimeOut - The original/intended punch-in time without any adjustments (rounding, snapping, editing) igbID - A unique internal database identifier for the job being worked clockNoteOut - The ne telft with the clock out

- ClockNoteOut The note left with the clock out
 ClockNoteOut The note left with the clock out
 CloientIn 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
- clientOut 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 i
 auditID A unique internal database identifier for the audit
 eventLogID A unique internal database identifier for the punch that was modified, created or deleted
 eventLogPart What was modified, for example 'in' out' or 'event"
 auditTiD The userSID of the person who made the change (or NULL if made by the system)
 source Where the change was made, for example 'in' event' "clock in' "clock out' or 'job"
 etail Muman-readable detail of exactly what happened
 ojobs TimeIPS Jobs. The "code" field holds the code that employees enter to clock into the job.
 ijobID A unique internal database identifier for the job
 ican 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
 billingAte A billing rate for this job to customers
 catID A unique internal database identifier for the category this job belongs to
 custor 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
 extription The description of the job
 extription The description of the job
 extription The description of the 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 department - Departments
 customers - Customers for

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

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 <u>Unix Timestamps</u>. 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

- The timestamp you want to convert
 The usersID of the user to use for time zone and DST lookups
 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 <u>here</u>.

Example: SELECT usersID, eventLogID, userDate(adjTimeIn, usersID, null) as "Punch In" FROM eventLog LIMIT 10;

Example: SELECT usersID, eventLogID, userDate(adiTimeIn, 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</pre>
                 AND accrualLogID IS NULL
AND deleted IS NULL
                        adjusted_on BETWEEN 1363582800 and 1364274000
usersID_IN (1)
                 AND
AND
                 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
                 eteted is NULL
AND (accrualLogID IS NOT NULL OR (adjusterID IS NOT NULL AND adjustment≻θ))
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 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</pre>
                 )
        UNION ALL
        SELECT usersID, typeID, amount as adjustment, occurs as adjusted_on
FROM benefit_reset r
WHERE resetID_NOT IN (
                         SECID NOI IN (
SELECT 1. resetID
FROM benefit_reset r1, benefit_reset r2
WHERE r1.typeID = r2.typeID
AND r1.usersID = r2.usersID
AND r1.occurs <= 1364274000
AND r1.occurs <= 1364274000
AND r1.occurs <= r2.occurs
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 adjustment IS NOT NULL AND adjusted on >= (
                               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
           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.cycersIO IN (3)
AND r1.typeID IN (3)
AND r1.usersID IN (1)
AND r.usersID IN (1)AND r.typeID IN (3) AND r.occurs <= 1363582800
WHERE u.usersID IN (1)
GROUP BY tempBenefitLog.usersID, tempBenefitLog.typeID;</pre>
```

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"
- The login process on the computer checks with an authority, such as Active Directory or LDAP.
 If successful, the employee's computer asks TimeIPS to make a nonce password for the user "as "asmith" for example:

- 5. If successful, the employee's computer basis inhere in whice a honce password for the user sample. The sample is a successful in the sample is a successful in the sample. The sample is a successful in the sampl
- 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 employee 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:

- An employee changes their password
 The employee's computer makes a call to capi to set the new password, for example
 http://timeips/capi.php/setPassword?username=admin&password=timeips&targetUsername=asmith&newPassword=apple23&format=xml
 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 FIP backups without a limeIPS 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:

- <u>IPSABO</u> <u>TimeIPS</u> <u>Automatic</u> <u>Backup</u> <u>Options</u> <u>Module</u>[™] <u>IPSABO</u> <u>PDF</u> <u>DataSheet</u>

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 kequest 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 are 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™ • IPSAP<u>P - PDF DataSheet</u>

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
- Anced 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 actions. Actions can be set to nappen immediately, after a specified time from for 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.

- 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:

• <u>IPSBEN</u> - Advanced Benefits Tracking™ • <u>IPSBEN</u> - 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.
- Cash all control 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.
- a when used with remote Ctocking, a separate access on Can be provided for each division, and only employees belonging to the division can be of the one of Employees that a settings (like network addresses and master configuration options) are only available to system administrators belonging to the master division.
 b Critical system settings (like network addresses and master configuration options) are only available to system administrators belonging to the master division.
 b 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.
 b 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 TimeTPS Version 1.8.62 or later

Find more details at the following links:

• <u>IPSDIV</u> - <u>Division Module</u>™ • <u>IPSDIV</u> - <u>PDF</u> 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
- nessages • 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 for settation days before an employee's birthday.
 On a set day each year
 On a set day each year
 On a set day each 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 context.

black femiliner can fun for a single employee of a group of employees in the cancer, femiliner can be cancer, femiliner can be completed 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

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 *** • Munis o Sage: Pacathree (Pro, Complete, Premium and Quantum) o Sage: Paschtree (Pro, Complete, Premium and Quantum) o Sage: Payroll Services o Sage: MasterBuilder (Integration: Version 14.2 or later) o Sage: Sage 50 Accounting (New version of Peachtree. Import via Time Tickets) o 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 Insvnc

Also includes all functions in the Custom Pavroll Export:

• Unlimited. fully mappable fields.

- Onlimited, 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:

 <u>IPSIMP</u> - Employee Import/Export Module[™]
 <u>IPSIMP</u> - 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

- 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.

- ID/Badge Payroll Type Default Each Clock End of Overtime Sched E-mail Clock Errors Week Overtime Aler E-mail Address red@timeips.com ۲ 0 00 No E-mail / Private E-mail: vertime Limit: 15 minutes 💌 Overtime Alert Interval: 5 minutes 💌 Show Errors:
- 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:

• <u>IPSIPS - Intelligent Personnel System Upgrade Module™</u> • <u>IPSIPS - PDF DataSheet</u>

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 rates 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 set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee overrides on the per-job pay, including all the above options
 Option to set per-employee and the above options
 Option to set per-employee overrides on the method is a per-job pay.
 Option to set per-employee overrides on the per-job pay.
 Option to set per-employee overrides on the per-job pay.

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:

Real-Time Job/Project Tracking Module[™] PDF DataSheet • IPSJOB • IPSJOB

520 of 529

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:

• <u>IPSJW0</u> - <u>Real-Time Work Order Tracking Module™</u> • <u>IPSJW0</u> - <u>PDF DataSheet</u>

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:

o LDAP

Note: Requires TimeTPS 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
- O For each day of the week, set the number of hours worked before Overtime or Doubletime goes into effect
 O 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

- O 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
 O 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
 S et any work done at any time to Default, Standardtime, Overtime, Doubletime or Premiumtime
 S et any work done at any time to count (or not count) toward overtime
 S et any work done at any time to count (or not count) toward overtime
 S et any work done at any time to count (or not count) toward satisfying overtime levels for the day/week
 O overtide pay type and count (or not count) toward satisfying overtime levels for the day/week
 O overtide pay type and for pay engineers

 - 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 TimETPS. 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 Pe IPSPRM PDF DataSheet Permissions Module™

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.

- e Creation and management of Costom pacework release.
 e Each piecework item can have monetary pay, or can be fractions-of-an-hour pay.
 e Piecework pay rates can be set for all employees with exception/override for selected employees.
 e Pay codes can be set per piecework for cost tracking and allocation.
 e Pay cord 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:

<u>IPSPWT</u> - 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.



• 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:

<u>IPSREM</u> - <u>PC</u> and <u>Web-Based</u> Clocking for Mobile Devices [™]
 <u>IPSREM</u> - <u>PDF</u> 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 (B10-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, somting, formatting, paycodes, stored templates and more. Supports custom fields, headers, somting, formatting, paycodes, stored templates and more. Supports customadard 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:

• <u>IPSRPT</u> - <u>TimeIPS Custom Reporting Module™</u> • <u>IPSRPT</u> - <u>PDF DataSheet</u>

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 if we apply of times, the ability to set minimus 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 O 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
- O Prevent early clock-ins by snapping clock-in times forward to a designated start time
 Accommodate early clock-ins by snapping clock-in 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
 Etiminates the basele of clocking out/in for lunch or hreak
 - Automatically clock selected enipoyees out to characterize the same 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
- Option to the deduct intern in a data of the set of the specified length was alread
 Of clock infout a group of employees at one time
 Option to clock into a job and to set a clock note
 O Drastically simplifies the process of manually adjusting time for each employee
- O brastically simplifies the process of influctually adjusting time for each employee
 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 it times. Used to automatically put employees in correct jobs, and to provide pay differentials via job pay rates at scheduled times.
 Specify a unimum break for employees. Used to prevent employees who try to return from break or lunch too soon.
- Spectry a minimum break for employees, beset employees, which yo became employees which yo became employees to be prevent employees which yo became employees for became employees 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 **\$My** Schedule**\$** section of My TimeIPS when the employee is logged on. Option to allow employees 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.
- O 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:

• <u>IPSSCH</u> - <u>Scheduling Module</u>™ • <u>IPSSCH</u> - <u>PDF</u> 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 TimeTPS 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:

• <u>IPSSEC</u> - <u>Enterprise Enhanced Security Module™</u> • <u>IPSSEC</u> - <u>PDF DataSheet</u>

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:

• <u>IPSSFT - Shift and Shift Differential Module</u>" • <u>IPSSFT - PDF DataSheet</u>

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.
 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, 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 for employees to the site.
- 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

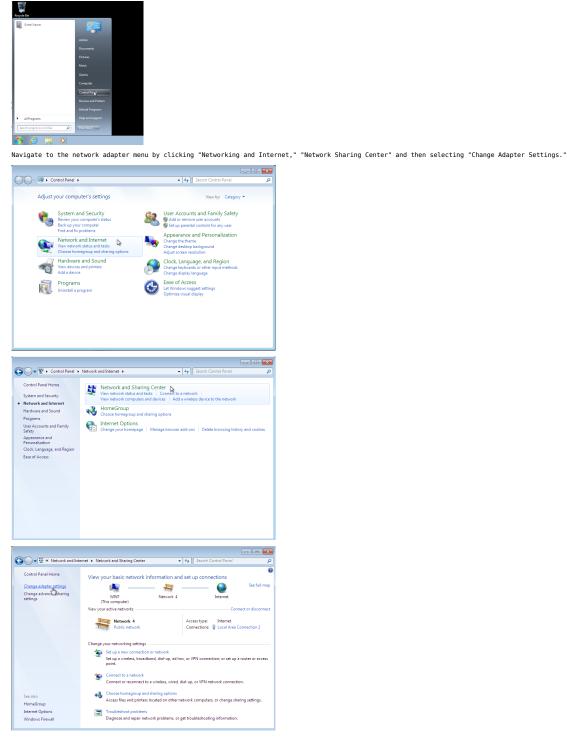
The TimeIPS Visual Time Edit module allows employee work and schedules to be viewed and edited in a visual presentation.

Note: Requires TimeIPS Version 1.9.2 or later

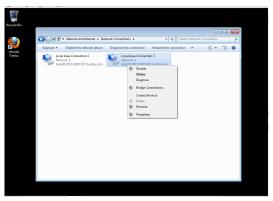
Find more details at the following link: • IPSVTE - Visual Time Edit Module™

Internet Connection Sharing

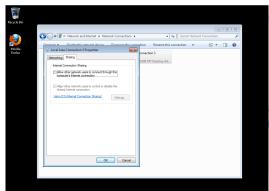
Step 1
Make sure you have a free Ethernet (network) port on your laptop. Step 2 Turn on the PC. Once it finishes booting up, click the "Start" button and then "Control Panel" to open the Control Panel.



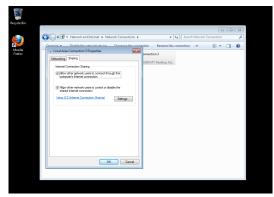
Step 3 Right-click the connection that you want to share with the Time-clock (Make sure you pick your Wireless/Aircard connection), and then select "Properties." You may be asked to provide your administrator password.



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 Alltel Use the format number@messag.alltel.com Verizon Wireless Use the format number@text.com Bellsouth Use the format number@bellsouth.cl US Cellular Use the format number@bellsouth.cl Virgin Mobile USA Use the format number@text.com

• Metro PCS Use the format number@mymetropcs.com • Metro PCS Use the format number@mymetropcs.sms.us

> ©2004-2014 TimeIPS, Inc. All Rights Reserved - TimeIPS and the TimeIPS logo are registered trademarks of TimeIPS, Inc. "Intelligent Personnel System" "Run your Business. We'll watch the clock." are trademarks of TimeIPS, Inc. TimeIPS is protected by one or more patents. Patent No. US 7, 114.684 B2.