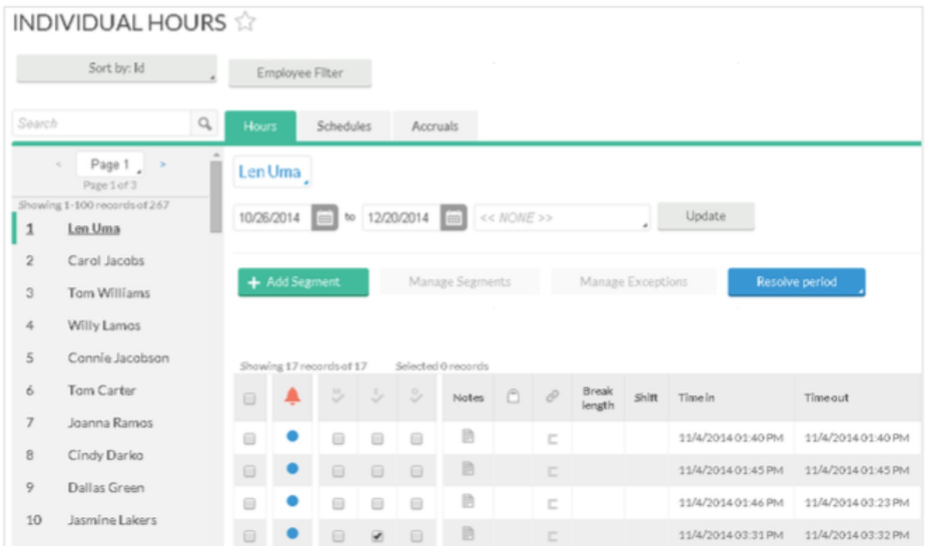
Individual Hours Essentials



The **Individual Hours** screen is where you can add, edit, and review employee hours.

On the left side of the screen, you will see a list where the first 100 employees will appear. Specific employees can be displayed using the **Filter** button. Employees can also be filtered by typing in a name or number into the **Search** bar. Clicking the **X** button to the right of the search bar will revert the list to the previous settings.

Once you have selected an employee, their information should appear at the top of the screen. You will be able to see the employee's name, as well as the number of Regular, Overtime 1, and Overtime 2 hours worked.

Adding a Segment

1. Click on the **Add** button to access the **Add Segment** window.
2. Enter in a **Date** and **Time in**. You can use the calendar to select a date or the clock icon to enter a time as well as manually entering in those numbers.
3. If the employee is currently clocked in, check **Individual is clocked in**. If the segment has already been completed, enter a **Date** and **Time out**.

4. If this is a time sheet entry, click **Time Sheet Entry**. This will enable the **Hours** field and allow you to enter in a segment length. The **Date** and **Time in** will remain as the anchor point of the shift.
5. If the segment is going to be tied to another segment by a break, select the appropriate option in the **Break Type** drop-down.
6. Select the job code this segment was worked in the **Job Code** drop-down.
7. If the segment was the result of a missed punch, you can signify this by selecting **Missed in punch** and/or **Missed out punch**.

Editing a Segment

In order to edit a segment already in the system:

1. Click on the segment to highlight it, then click **Manage,** and **Edit** to access the **Edit Segment** window. You can also double click on the segment.
2. The **Date** and **Time** fields can be edited.
3. If the employee is currently clocked in, enable **Individual is clocked in**.
4. If you want to make the segment a time sheet entry, check **Time Sheet Entry**. This will enable the **Hours** field and allow you to enter in a segment length. The **Date** and **Time in** will remain as the anchor point of the shift.
5. If rounding is enabled and you'd like to edit the actual times of the segment, check **Edit actual times**.
6. If you want to change the break type that follows the segment, select the appropriate option in the **Break Type** drop-down.
7. Select the job code this segment was worked in the **Job Code** drop-down.
8. If this segment is going to earn a different hourly rate than the one normally assigned to this employee, enter it into the **Rate** box.

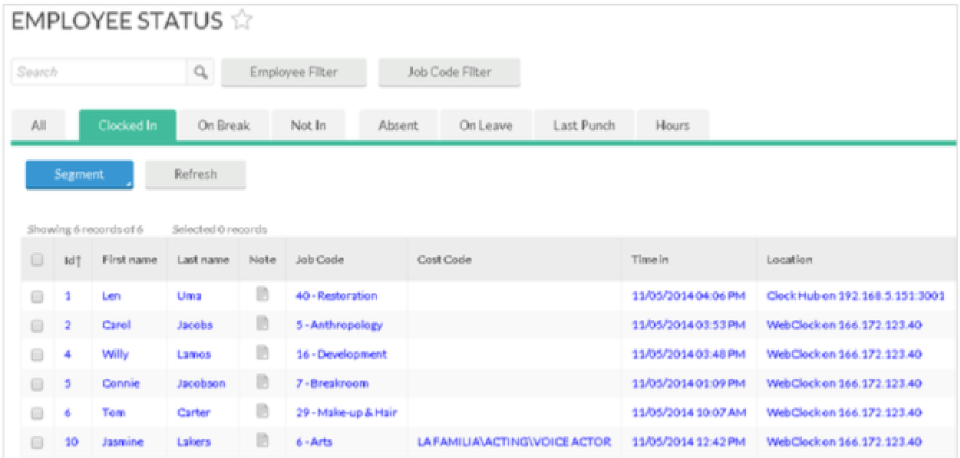
Deleting a Segment

In order to delete a segment already in the system, click on the segment to highlight it, click **Manage,** and **Delete**. This will bring up a prompt asking you to verify that you want to delete the segment. To delete the segment, click **Ok**.

Approving Shifts

If approvals are set as required, you will be unable to close weeks if you have unapproved employee segments. To approve a segment, click on the checkbox under the appropriate header (**M** for **Manager**, **E** for **Employee**, and **O** for **Other**). To approve all the segments currently displayed, simply click on the header icon itself.

Employee Status Essentials



The **Employee Status** screen allows managers to monitor employees in real time. From this screen, you can see which employees are clocked in, what job code they are working in, and how long the employee has been clocked in. You can also switch job codes for your employees and clock them out.

Employee Status Tabs

- The **All** tab allows the user to view every employee they have access to, their status, and (if clocked in) their job code, time in, and location.
- The **Clocked In** tab only shows the clocked in employees, as well as their job code that employee is clocked in to, the time they clocked in, and the location of the clock operation.
- The **On Break** tab only shows employees that are currently on break, as well as the job code that employee is clocked in to, the time they took a break, the duration of the break, and the location of the clock operation.
- The **Auto Out** tab only shows employees that are clocked into an auto out job code, as well as the job code that employee is clocked into, the time they clocked in, and the location of the clock operation.
- The **Not In** tab only shows employees that are not currently clocked in.
- The **On Leave** tab shows each employee currently clocked into a leave code as well as any shift notes about that segment.
- The **Last Punch** tab shows each employee, their status, their last clock in, and their last clock out.

- The **Hours** tab shows each employee, their hire date, the amount of hours worked today, the amount of hours worked this week, their employee status, and the last time that employee clocked out.

Clocking Employees Out from Employee Status

1. Select the employee(s) you wish to clock out from the **Employee Status** list.
2. Right click on the employee or select **Segment** and choose **Clock Out**.
3. In the **Clock Out** window, enter the date and time you want the segment to end on and click on **Clock out**.

Changing an Employee Job Code

1. Select the employee(s) you wish to change job codes for from the **Employee Status** list.
2. Right click on the employee or select **Segment** and select **Change job code**.
3. Enter the date and time at which you want to change the employee's job code, as well as the new job code, then click on **Change**.

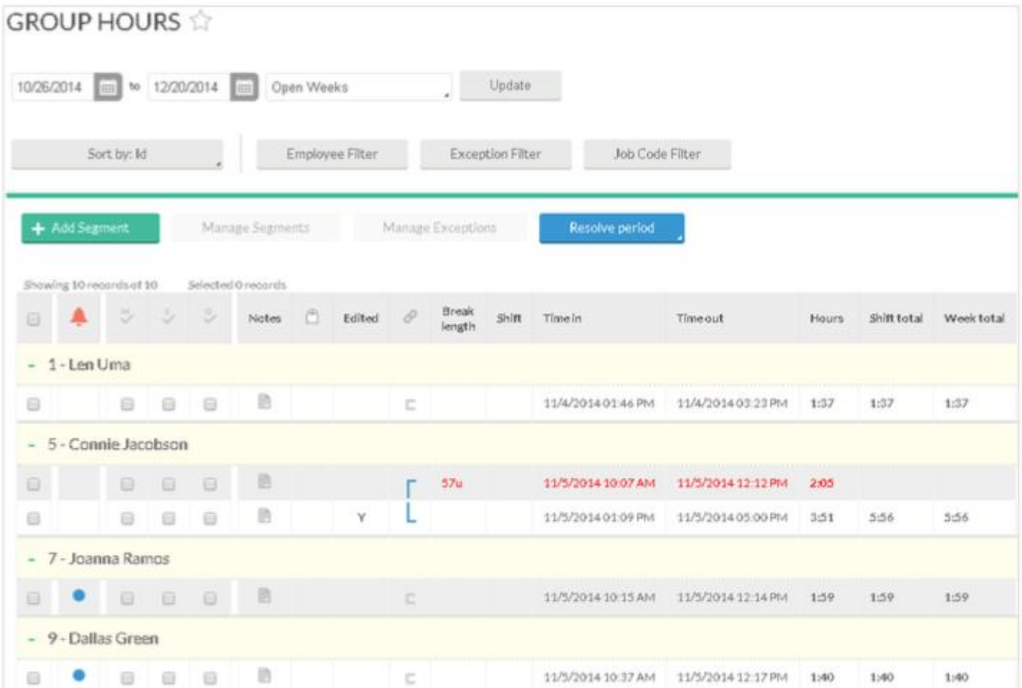
Managing an Employee's Hours

1. Select an employee from the **Employee Status** list.
2. Right click on the employee or select **Segment** and select **Individual Hours**.
3. This will take you to the **Individual Hours** window for the employee.

Viewing an Employee's Shift Information

1. Select an employee from the **Employee Status** list.
2. Right click on the employee or select **Segment** and select **Shift Information**.
3. On the **Shift Information** window, you will see the segments worked for that employee today.

Group Hours Essentials



Group Hours allows users to add, edit, and view segments for multiple individuals at the same time. Employee exceptions – as defined in the Exceptions Tab of **Employee Profiles** – can also be viewed and approved here.

Below the **Group Hours** feature name, you will see **Sort** and **Filter** buttons. The filter buttons allow you to determine what employees will be visible when you click **Update**.

The list can also be sorted in several ways in ascending or descending order by clicking the **Sort** button.

The information bar contains several buttons that determine what information is available and how it can be edited:

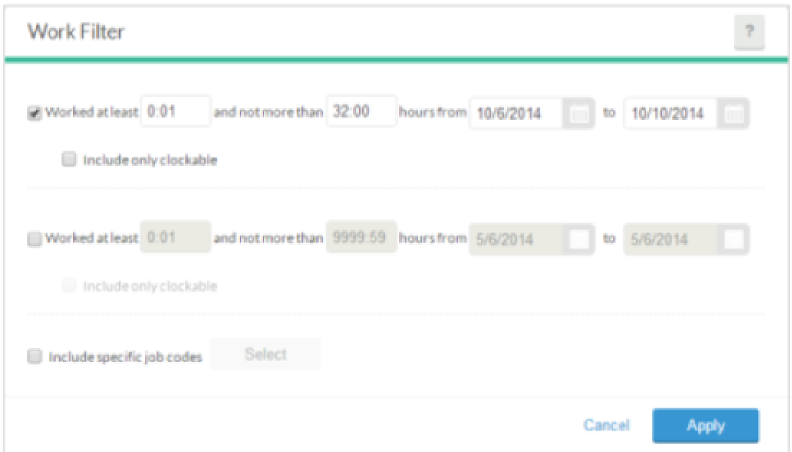
- **Date Range Boxes**: This allows you to manually enter in a range of dates to view.
- **Date Range dropdown**: This allows you to select from a number of commonly used date ranges (e.g., last month, week to date, yesterday).
- **Update**: Once a date range has been selected, click the **Update** button to see segments from within that time frame.
- **Add**: This button allows you to add hours for several employees at once. For more information, see **Adding Segments** (below).
- **Manage**: This button allows you to edit the selected segments. For more information, see **Editing Segments** (on page 3).
- **Employee Filter**: This button allows you to select which employees will appear when you click **Update** by using the Employee Filter.
- **Job Code Filter**: This button allows you to select which job codes will return results when you click **Update** by using the Job Code Filter.
- **Exception Filter**: This button allows you to filter out results to only those that are flagged with a certain exception by using the Exception Filter.

Once you have selected the range and type of segments you would like to view, click **Update**.

Adding Segments

1. Click on the **Add** button.
2. Select the employees you would like to edit from a filter or from the list. You can use a regular **Employee Filter** or use the **Work Filter**.

Work Filter



The **Work Filter** allows you to filter employees based on hours worked as well as specific job codes. For example, if you wanted to only include employees that worked 0:01 to 32:00 hours on the week of October 6th, 2014, you would fill out those fields on the work filter. Up to two different hour filters can be created as well as a job code filter on the **Work Filter** screen.

3. Click **Next**.
4. Create the segment for your employee(s). For more information, see "Adding a Segment" in Individual Hours.
5. If the segment will repeat across multiple days, select how many days you would like to include in the **Repeat days** dropdown.
6. Click **Next**.
7. View the summary for the segment(s) you are adding. If you would like to make sure the segments will create correctly, click **Preview**. Once you are satisfied with the changes made, click **Process**.

Editing Segments

Individual segments can be edited from **Group Hours**. Please note that you can only edit one segment at a time - selecting multiple segments will disable the **Edit** option. For more information, see "Editing a Segment" in Individual Hours.

Approving Shifts

If any of the approval types are required for your employees, you will be unable to close weeks if you have unapproved segments. To approve a segment, click on the checkbox under the appropriate header (**M** for **Manager**, **E** for **Employee**, and **O** for **Other**). To approve all the segments currently displayed for all displayed employees, click on the appropriate approval column headers.

Once the approval boxes have been checked, you can then click on the blue **Apply Approval** button to lock the approvals into the system, or the gray **Discard Approval** button to clear out the changes.

Approving Exceptions

Exceptions can be approved for multiple employees at the same time within **Group Hours**. To approve exceptions:

1. Select one or more segments that you would like to approve.
2. Select **Manage Exceptions** in the information bar, or right click on the Exceptions column.
3. Under the **Exceptions** header, you will see all the applicable exceptions for the selected segment(s). Here, you have the option to **approve** or **unapprove** the selected segment(s). If multiple segments have been selected with different approval states (e.g., some have been approved, some have not), neither option will be selected.
4. Click the **Approve** radio button to approve that exception for the selected segment(s).

Mass Approving Exceptions

All exception types for the displayed range can be approved or unapproved at once by selecting the **Resolve Period** button and choosing which exceptions you would like to approve.

> **NOTE**: Resolving exceptions will resolve ALL exceptions in that time frame, not just the ones visible on the page.

Deleting Segments

Multiple segments can be deleted across multiple employees within **Group Hours**.

1. Select one or more segments that you would like to delete.
2. Select the **Manage Segments** button in the information bar, or right click on the segment(s) to bring up the **Manage** menu.
3. Select **Delete**.

Splitting Segments

Split Segment by Length

1. Right click on a segment, or select a segment and click on the **Manage Segments** button. Select **Split segment by length**.
2. You can then split a segment up by clicking on the icon in the wizard that appears.
3. Once the segment has been split, specify a segment length in the **Length** column, or by specifying a time for the segment change in each respective field in the **Time** column.

4. Click **Save** to commit the changes to the database.

Split Segment by Percentage

1. Right click on a segment, or select a segment and click on the **Manage Segments** button. Select **Split segment by percentage**.
2. You can then split a segment up by clicking on the icon in the wizard that appears.
3. Once the segment has been split, specify a segment percentage in the **Length** column, or by specifying a time for the segment change in each respective field in the **Time** column.
4. Click **Save** to commit the changes to the database.

Add Break

1. Right click on a segment, or select a segment and click on the **Manage Segments** button. Select **Add break**.
2. A window will appear allowing you to specify the time of the break, as well as the break type and length of the break. You can also specify where any applicable tracked information will go after the split occurs.
3. Click **Save** to commit the changes to the database.

Toggle Breaks

If an employee forgot to take a break, or if you just want to tie together segments with a break, you can manually do so.

1. Select the segment you want to enable a break after.
2. Select **Manage** and click on **Toggle Break**. This will tie the segment together with the one below it, as long as the gap between the two is within the maximum break length.

Period Reports Essentials

The **Period Reports** screen is where you can create, customize, print, and save reports on your employee hours. These reports can be customized to show information on select employees, and can be printed and/or downloaded in **HTML**, **PDF**, or **OpenXML** formats.

Configuring and Running a Report

1. Select the report you'd like to run from the **Period Reports** screen (**Hours > Period Reports**).
2. Apply any desired **Employee** and **Job Code Filters** by clicking the respective buttons at the top of the screen.
3. Enter in the date range for the report, or select a pre-defined date range from the drop-down.
4. Click on **Settings** to change individual facets of the report. These settings are unique to each report. For example, if you want to remove employee social security numbers from the **Complete Payroll Report** you would uncheck "**Print social security number at top of page**" in the **Settings** menu.
5. If you would like to change the font, spacing, or page orientation used on the report, click on **Page Layout** at the bottom of **Settings**.
6. If you have customized the report, click **Save** to commit these changes and return to the **Period Reports** screen.
7. Click **Preview** to see an example report and make sure that it includes all of your criteria.
8. Click on the **Download** button to choose which output format you would like to download. TimeClock Plus® produces three types of output:
   - **HTML**: The output is produced in a .html file that can be opened by a web browser.
   - **PDF**: The output is produced in a .pdf file that can be opened in Adobe reader or another program designed to read .pdf files. As the .pdf report is more difficult to edit than the other formats, many companies use this for producing reports to send out.
   - **OpenXML**: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice Calc.

Automating Reports

When a user is saving a report or editing a report that has already been saved, they can set it up to be sent out using automations. To do so:

1. When adding or editing a saved report, click **Add** under the **Report Automation** header.
2. Create a **Description** for the automated report.
3. Select the **User to run automation**. The report will be ran with the permissions of this user.
4. Choose whether or not you want the automation to be **Active** by toggling that checkbox.

5. Select a **Reporting Period.** This is the range of dates the report will run for. The different Reporting Periods that can be selected are:

   - **Fixed Period**: The report will always run between the two selected dates.
   - **Fixed to today**: The report will always run from the selected date to the current date at the time of automation.
   - **Fixed to yesterday**: The report will always run from the selected date to the day before the automation is run.
   - **Floating period**: The report will run using a defined period from the **Period** dropdown. This range can be modified by changing the **Period** start and stop offset times to go forward or back several days.

6. Click **Next** to view the **Output Options**. Select whether you would like to **Generate a single report** that contains all information, or **Generate personalized reports for each employee included** (each report will be rendered separately). Additionally, pick at least one type of output from the **Output Formats** column.
7. If you would like the report to be sent even when there is no relevant information, check **Generate output even if there is no data to include**. If the report generates exceptions and you would like to view them, check **Include exception log with output**.
8. Click **Next** to access the list of **Mailing Recipients**. Here you can enter in a list of email addresses you would like to have the report sent to. If you are logged in as a non-ADMIN user and would like to receive the report, check **Include the user that runs automation as a recipient**. If you would like to send an SMS message informing an individual of the automation, check **Add as SMS address** when entering the address.

TIP: A properly entered SMS address will usually resemble an email address, and typically includes the recipient's 10 digit phone number, followed by the @ sign and the service provider's domain name. Check with the recipient's service provider to verify the correct sequence before entering this information into the system.

9. Click **Next** to edit the body of the email. This is a brief message that will be sent along with the reports. If left blank, just the reports will be sent.
10. Click **Next** to schedule when the report is sent. Click on the **Add** button to create a new rule, or the icon to edit an existing rule. In the Task Scheduling wizard, set when you would like to **Execute** the rule.
11. Click **Save** to commit the task, and **Finish** to save the report.

For assistance please call Customer Support at: (325) 223-9300
Or visit us at: Support.TimeClockPlus.com