

# TOTALPASS PROXIMITY USER GUIDE

TotalPass Small Business Premium



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# Chapter 1: Getting Familiar with Your Time Clock

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**Everything you need to get your time clock up and running:**

- ✓ Getting your time clock connected and logging into the software for the first time
- ✓ How to get help
- ✓ Navigating through the software

## Introduction

### Welcome

Thank you for choosing Icon Time Systems, we appreciate your business.

Our mission is to provide our customers with ease-of-mind through our quality products and excellent customer service. All of us at Icon Time Systems wish to thank you for placing your trust in our products. We pride ourselves on being innovators in the time and attendance industry, by developing products that are quick to install, simple to operate and reliable.

Use this guide to learn how to use the TotalPass Small Business Premium time and attendance system to perform essential tasks that will make tracking employee time, as well as your payroll processes, more efficient.

The TotalPass Proximity system offers breakthrough web-enabled technology that brings the simplicity of embedded software to your time and attendance system, all without requiring Internet access.



## System Requirements

### For Network Access

- Any Web browser on PC, Mac, tablet or smartphone.
- An available Ethernet port or wireless network.
- Remote Internet access also requires Internet and port forwarding to port 9844 or port 80.

### For Direct Connection

- Any Web browser on a PC or Mac that the clock is directly connected to.
- Available USB port on Windows PC or available Ethernet port on Windows PC or Mac.

### Payroll Export Utilities

- Paychex Flex, SurePayroll, Paychex Preview, Paycom, Paylocity, ADP Workforce Now, and QuickBooks Online exports are compatible with all operating systems.
- Windows Vista or above required for QuickBooks Plug-in\* and the ADP Export.  
\* Only available with QuickBooks desktop versions.

### Internet Connection Required

Ethernet connection is required for the following functionality:

- Emailing alerts, backups or payroll reports
- Connecting multiple time clocks together
- Accessing the time clock from more than 1 computer (Network connection required)

## Features

The **TotalPass Small Business Premium Proximity** is the perfect fit for a growing business that requires a time clock that can keep up with changing needs. This time clock is ideal for those companies looking for a feature-rich product that is fully supported by a nationwide network of experts.

- Capacity of 50 employees and upgradeable to 500 employees
- PIN (4-9 digits) or proximity badge entry (15 badges included. Additional badges sold separately.)
- 5 employee web punch entry licenses included, upgrade to a maximum of 50

- Configurable for remote Internet access
- Paid break tracking
- Import employees to the time clock from a CSV file
- Email supervisor alerts of high/low hours worked, or approaching overtime
- Automatic backup of time clock data, via email
- Email employee timecard reports
- Labor distribution reports
- Export to QuickBooks, ADP, Paychex Flex, Paychex Preview, SurePayroll, Paycom or CSV
- SSL data encryption for secure data transfer over the Internet
- Configurable for remote Internet access
- Automatic lunch time deduction
  - Timecard, Attendance, and Department based reports
  - Enter Holiday and NonWorked Hours for one or more employees
  - Track tips, job numbers, or piece counts with employee entry at the clock
  - Department tracking with department transfers at the clock
  - Individual supervisor logins with employee assignment
  - Connect up to 32 clocks together, sharing one software (500 employee max)

## **Available TotalPass Upgrades**

### **Benefit Tracking and Accruals**

This upgrade allows for automatically calculating vacation, sick, and personal time off. Accrual rates and tracking are customized per employee for maximum policy flexibility.

### **Upgrade Employee Capacity**

Expand your system with your business; upgrade the employee capacity from the standard of 50 employees to 100, 250 or 500 employees.

### **Employee Web Punch Entry**

Provides the employees with an option to punch In and Out from their Web browser; on their office computer, smart phone or tablet. The system has 5 employee Web Punch Entry licenses included, with an available upgrade for a maximum of 50 employee Web Punch licenses.

## Connection / Setup

Refer to the TotalPass **Quick Start Guide** for instructions on setting up your employee time clock's connection and logging into your time clock for the first time.

You can find a copy of the Quick Start Guide at the link below:

[http://www.icontime.com/images/docs/collateral/TotalPass\\_Wifi\\_Proximity\\_Time\\_Clock\\_QSG\\_Web.pdf](http://www.icontime.com/images/docs/collateral/TotalPass_Wifi_Proximity_Time_Clock_QSG_Web.pdf)

## Logging In

To log in and view employee information and punch details, enter the time clock's assigned Internet Protocol (IP) address into your Internet browser address field.

You must enter the address exactly as displayed below. For example, if the assigned address is 192.168.2.103, enter that text directly into the address field, preceded with "**http://**".



**Note:** If you are logging in using USB, navigate to <http://totalpass.timeclock> or enter <http://172.20.20.1> as the IP address.

## Support and Troubleshooting

For your convenience, troubleshooting tips and how-tos can be found on our technical support site at [www.support.icontime.com](http://www.support.icontime.com).

This system includes a 30-day trial of our [Gold Technical Support Plan](#), which includes unlimited telephone, email, and remote assistance support. Support can be reached Monday through Friday from 7:30am to 4:30pm (PST) at (800) 847-2232 option 1 or via email at [support@icontime.com](mailto:support@icontime.com).

## Integration with Payroll

### Built-in Exports

Your time clock includes a Paychex Flex, Paychex Preview, and SurePayroll export formats built-in. It also includes a CSV Export option, used for viewing time clock data in Excel or importing into other 3<sup>rd</sup> party payroll programs.

### Desktop Installed Export Utilities

Exporting time clock data to PC versions of QuickBooks or ADP requires the installation of an export utility program. Select on the appropriate link below.

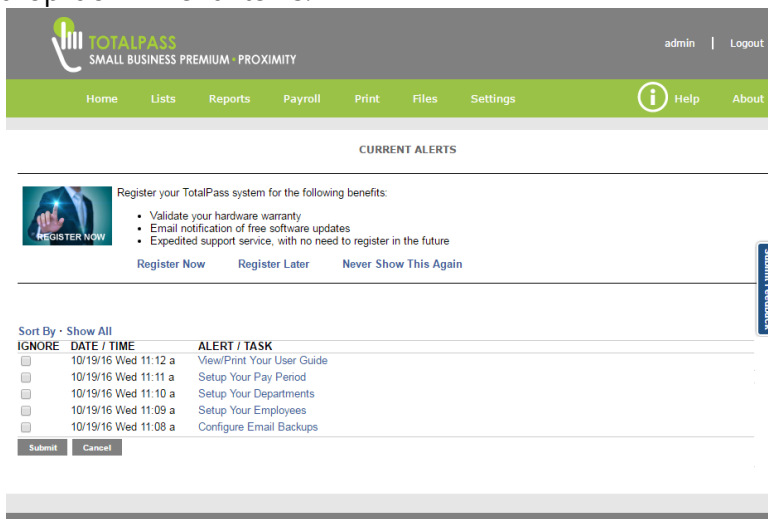
- **QuickBooks** – [www.icontime.com/utc-quickbooks-export](http://www.icontime.com/utc-quickbooks-export)
- **ADP** – [www.icontime.com/utc-adp-payroll-export](http://www.icontime.com/utc-adp-payroll-export)

## Register your Time Clock

The first time you log in to your time clock, you will be prompted to register it. Register your time clock to ensure that you receive email notification of free software updates, your manufacturer's 1 year hardware warranty, and 30 days of free technical support.

## Navigating the Time Clock Software

The time clock interface is designed to allow you to quickly and easily complete your tasks and run your reports. In this section you will learn how to navigate through your time clock application. Application navigation is done through six distinct menus: Home, Lists, Reports, Files, Settings, and Help. Moving your mouse cursor over each icon displays the individual drop-down menu items.



The screenshot shows the TotalPass software interface. At the top, there is a navigation bar with the TotalPass logo and the text "SMALL BUSINESS PREMIUM PROXIMITY". On the right side of the navigation bar, there are links for "admin" and "Logout". Below the navigation bar, there is a green bar with menu items: "Home", "Lists", "Reports", "Payroll", "Print", "Files", "Settings", "Help", and "About".

Below the navigation bar, there is a section titled "CURRENT ALERTS". On the left, there is a "REGISTER NOW" button. To the right, there is a text prompt: "Register your TotalPass system for the following benefits:" followed by a bulleted list:

- Validate your hardware warranty
- Email notification of free software updates
- Expedited support service, with no need to register in the future

Below the list, there are three buttons: "Register Now", "Register Later", and "Never Show This Again".

Below the registration prompt, there is a table with the following columns: "IGNORE", "DATE / TIME", and "ALERT / TASK". The table contains five rows of alerts:

IGNORE	DATE / TIME	ALERT / TASK
<input type="checkbox"/>	10/19/16 Wed 11:12 a	<a href="#">View/Print Your User Guide</a>
<input type="checkbox"/>	10/19/16 Wed 11:11 a	<a href="#">Setup Your Pay Period</a>
<input type="checkbox"/>	10/19/16 Wed 11:10 a	<a href="#">Setup Your Departments</a>
<input type="checkbox"/>	10/19/16 Wed 11:09 a	<a href="#">Setup Your Employees</a>
<input type="checkbox"/>	10/19/16 Wed 11:08 a	<a href="#">Configure Email Backups</a>

At the bottom of the table, there are "Submit" and "Cancel" buttons. On the right side of the table, there is a vertical button labeled "Submit Feedback".

## Home Page

When you first log into your time clock application, the Home page displays automatically. The Home page provides a quick glance at the activity on your time clock, including notifications of custom alerts. The Home page also contains helpful links to configure your software.

### Current Alerts

The Home page displays important system alerts and time clock activity alerts. For instructions on customizing your alert settings, refer to [Setting Your Alert Preferences](#) in Chapter 2.

When you no longer want to be notified of a particular task or alert, check the box next to that item in the **IGNORE** column, and click **Submit**. If you would like to see past alerts, click **Show All**. To view the details of the alert, click the alert link in the **ALERT/TASK** list.

## **Lists Menu**

Use the Lists menu for adding, modifying or deleting employees, departments, supervisors, or enabling or disabling additional time clocks connected to the system. Refer to

### [Chapter 3: Setting Up Your Employees](#)

for instructions on setting up employees, and [Chapter 5: Departments and Supervisors](#) for instructions on configuring departments and additional time clock supervisors.

## **Reports Menu**

Your time clock comes with four reports that make it quick and easy to get the information you need to complete your work and process payroll. In addition, with the Create Report option, you can run custom filters for specific punch times, dates, employees, and departments. Use the Reports menu to access the reports. Refer to [Chapter 6: Generating Reports](#), for additional information on generating and customizing reports.

## **Payroll Menu**

The Payroll menu allows you to create exports of your time clock data to be imported you're your payroll program for streamlining payroll day. In addition, within the Payroll menu, find options to email the timecards to individual employees or as one report, to a manager. Refer to [Chapter 6: Generating Reports](#), for additional information on sending your time clock data to payroll.

## **Files Menu**

Use the Files menu to back up data, restore data back-ups, Delete Old Punches, and update your employee time clock.

## **Settings Menu**

Use the Settings menu to customize your payroll, overtime, punch, device, and alert preferences. Before running any reports, set your preferences as described in

## **Help Menu**

The Help menu gives you quick access to the Help Center and to view the About Your Clock page for your time clock.

# Chapter 2: Setting Your Time Clock Preferences

**Before accurate reports can be generated and employee punch details are calculated correctly, you must set your time clock rules and preferences:**

- ✓ Setup your pay period and overtime rules
- ✓ Setup punch rounding and Employee Input options
- ✓ Customize the PIN length and Alert Preferences

## Setting Your Pay Preferences

You can access your Pay Preferences in one of two ways:

- Click **Setup Your Pay Period** in the Alert/Task list
- Select **Preferences** from the Settings menu.

Follow the instructions below to set your Pay Preferences.

1. Complete the **Company Name** field and, if applicable, the **Company Payroll ID** field. These will be used when emailing time
2. Select the applicable option from the **Pay Period Type** drop-down menu:
  - **Weekly** - Employees are paid once per week
  - **Bi-Weekly** - Employees are paid every two weeks

The screenshot shows a web interface for setting payroll preferences. At the top, there are tabs for 'Pay', 'Punch', 'Device', 'Alerts', and 'Custom Fields'. The 'PAYROLL PREFERENCES' section includes the following fields:

- Pay Period Type:** A dropdown menu currently set to 'Weekly'.
- Last Pay Start:** A date field containing '12/29/13'.
- This Pay Start:** A date field containing '01/05/14'.
- Next Pay Start:** A date field containing '01/12/14'.
- Day Start:** A time field containing '12:00a' with up and down arrow icons.
- Week Start:** A dropdown menu currently set to 'Sun'.



- **Semi-Monthly** - Employees are paid twice per month
  - **Monthly** - Employees are paid once per month
3. If you select the semi-monthly pay period, two additional date fields display that must be completed.
- Type the first day of the month that your pay period begins in the **Start Semi-Monthly on** field.
  - Type the second day of the month that your pay period begins in the **and on** field.
4. Click in the **Last Pay Start** field to open the calendar and select the date that your previous pay period started.

**Tip:** Use the << and >> arrows to select the year. Use the < and > arrows to select the month.

5. Click in the **This Pay Start** field to open the calendar and select the date that your current pay period started.
6. Click in the **Next Pay Start** field to open the calendar and select the date that your next pay period will start.
7. Type the time of day that your workday begins in the **Day Start** field. You only need to modify this setting if your company has a 24-hour work schedule and needs to accommodate overnight shifts; it is recommended that this setting remain at 12:00am.
8. Select the day of the week that your work week begins from the **Week Start** drop-down menu. The company's weekly overtime calculations are based on this setting.

## Setting Your Overtime Preferences

Your Overtime Preference settings are on the Pay tab under Payroll Preferences. The TotalPass comes standard with two levels of daily and weekly overtime and consecutive day overtime.

Follow the instructions below to set your Overtime Preferences.

1. To set daily overtime rules, type the number of hours an employee must work in one day before they receive overtime

OVERTIME PREFERENCES		
Day OT1 After	<input type="text" value="8.00"/>	Hours
Day OT2 After	<input type="text" value="99.00"/>	Hours
Week OT1 After	<input type="text" value="40.00"/>	Hours
Week OT2 After	<input type="text" value="99.00"/>	Hours
Consecutive Day OT	<input type="text" value="No"/>	

pay in the **Day OT1 After** and the **Day OT2 After** fields as required. If your company does **not** pay daily overtime, type **99**.

2. To set weekly overtime rules, type the number of hours an employee must work in one week before they receive overtime pay in the **Week OT1 After** and the **Week OT2 After** fields as required. If your company does **not** pay weekly overtime, type **99**.

**Note:** Overtime (OT1) is calculated at time-and-a-half (1.5) the rate of pay and double overtime (OT2) is calculated at two times the rate of pay (2.0). With the Benefit Tracking Upgrade, these rates are customizable.

3. To set consecutive day overtime rules, change the Consecutive Day OT drop-down menu to Yes. This option will pay OT1 and/or OT2 on the seventh consecutive day of work, regardless of hours worked during the work week. This rule is most commonly used by unions and in California. If your company does not pay consecutive day overtime, change the Consecutive Day OT drop-down menu to No.

**Note:** Making a change to the overtime options prompts the time clock to restart. Doing so will make the time clock unavailable until the clock fully reboots.

4. Click **Submit** to save your settings and return to the Home page.

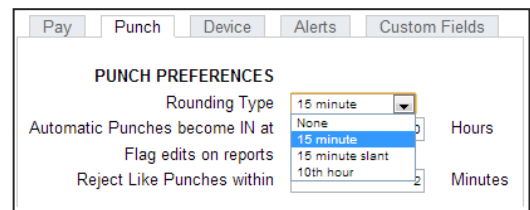
## Setting Your Punch Preferences

Select **Settings | Preferences** and click on the **Punch** tab. The Punch Preferences section displays.

**Note:** The rounding rule selected affects all punches system wide. The original punch time remains unchanged on the employee timecard. The punch(shift) hours round according to the rounding rules set.

Follow the instructions below to set your Punch Preferences.

1. Select the applicable rounding type from the Rounding Type drop-down menu.



The screenshot shows the 'Punch' tab selected in a settings menu. Below the tabs, the 'PUNCH PREFERENCES' section is visible. It includes a 'Rounding Type' dropdown menu currently set to '15 minute'. Below this are two rows of settings: 'Automatic Punches become IN at' with a dropdown set to 'None' and a '0' input field, and 'Reject Like Punches within' with a dropdown set to '15 minute slant' and a '2' input field. The units 'Hours' and 'Minutes' are indicated to the right of these rows.

- **None (No Rounding):** Accumulates 100% of all time registered on the clock.
- **15 Minute (7/8 Rounding):** Rounds and calculates punches to the nearest quarter hour (15 minutes). The split occurs in the middle of each quarter hour.

**To illustrate:** An In punch of 7 minutes 59 seconds *rounds back*

An In punch of 8 minutes 00 seconds *rounds forward*

**Example:** An In punch of 7:52 am would calculate as 7:45 am.  
An In punch of 7:53 am would calculate as 8:00 am.

- **15 Minute Slant (10/5 In, 5/10 Out):** Quarter hour rounding similar to above except the break point occurs on the 5th minute or 10th minute depending on whether it is an In punch or an Out punch.

**To illustrate:** An In punch of 4 minutes 59 seconds *rounds back*  
An In punch of 5 minutes 00 seconds *rounds forward*

An Out punch of 9 minutes 59 seconds *rounds back*  
An Out punch of 10 minutes 00 seconds *rounds forward*

**Example:** An In punch at 7:49 am would calculate as 7:45 am.  
An In punch at 7:50 am would calculate as 8:00 am.

An Out punch at 4:49 pm would calculate as 4:45 p.m.  
An Out punch at 4:50 pm would calculate as 5:00 p.m.

- **10th Hour:** Rather than rounding the punch hours, this selection calculates punches from the tenth hour point and advances each six minutes.

Minutes 10 <sup>th</sup>	Minutes 10 <sup>th</sup>
00-05 = .0	30-35 = .5
06-11 = .1	36-41 = .6
12-17 = .2	42-47 = .7
18-23 = .3	48-53 = .8
24-29 = .4	54-59 = .9

**To illustrate:** An In punch from :00 minutes after the hour to :05 after the hour rounds to the top of the hour (.0).

An In punch from :30 minutes after the hour to :35 minutes after the hour rounds to .5.

**Example:** An In punch at 7:30 am would calculate at 7.5 am.  
An Out punch at 4:05 pm would calculate as 4.0 pm.

2. The **Automatic Punches become IN at** field automatically makes the next punch an In punch after a determined number of hours. This option is convenient if an employee forgets to punch Out.

This option is only used when an employee entry method is set to Automatic. Refer to

## [Chapter 3: Setting Up Your Employees](#)

, for additional information.

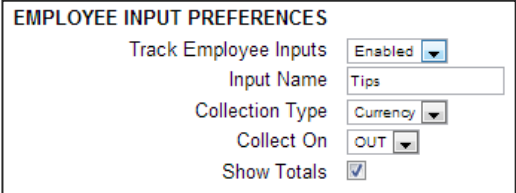
3. Check the **Flag edits on reports** checkbox to flag manually edited punches on reports. If checked, all edited punches are marked with **E**.
4. Type the number of minutes in **Reject Like Punches within** to reject the same type of punch at the time clock, within the minutes specified. The second punch is ignored.
5. Click **Submit** to save your settings and return to the Home page.

**Note:** Making a change to the rounding options will prompt the time clock to restart. Doing so will make the time clock unavailable until the clock fully reboots.

## Setting Employee Input Preferences

Your time clock can allow an employee to enter data at the clock (Employee Inputs) on either an In or Out punch. Employee Inputs are used to track employee tips, piece counts, or job numbers. This optional data will be recorded on the Timecards and Timecards by Dept. Report.

Select **Settings | Preferences** and click on the **Punch** tab. The Punch Preferences screen displays.



EMPLOYEE INPUT PREFERENCES	
Track Employee Inputs	Enabled
Input Name	Tips
Collection Type	Currency
Collect On	OUT
Show Totals	<input checked="" type="checkbox"/>

Follow the instructions below to set your Employee Input Preferences.

1. Enable Employee Inputs by selecting **Enabled** in the **Track Employee Inputs** drop-down menu. Additional Employee Input options will display.
2. Enter a custom name for the Employee Input. Common names may be; Tips, Job #, Piece Counts.
3. Select the **Collection Type** from the drop-down menu.
  - **Currency:** used for collecting tips or other currency related data.
  - **Number:** used for collecting any non-currency related numerical data such as piece counts or job numbers.
4. To determine whether the employee will enter the data on the In punch or Out punch, select the **Collect On** value from the drop-down menu.

- If you would like to total the employee input data on the Timecard report, select the **Show Totals** check box.

**Note:** Employee Inputs must also be enabled for each individual employee. Refer to [Assigning/Changing Departments](#) on page 42 for instructions.

## Setting Your Device Preferences

Select **Settings | Preferences** and click on the **Device** tab to go to the **Device Preferences** screen. Important information such as your Database Version, Software Version, and time clock serial number will appear at the top of this section

Follow the instructions below to set your Device Preferences.

- Select to display minutes on your reports in decimal or hh:mm (minutes) format from the **Calculated Time Format** drop-down menu.
- Select the length of the custom employee PIN (ID number) from the **PIN Number Length** drop-down menu. Customize employee PINs (ID numbers) in the **Edit an Employee** screen. Refer to

DEVICE PREFERENCES

Calculated Time Format	Minutes	
PIN Number Length	4	Digits
Hide Employee PIN	<input checked="" type="checkbox"/>	
System Prompt 1	Swipe Card	
System Prompt 2	Enter ID Code	
System Prompt 3	Scan Finger	
Supervisor Code	15 93 57	
Lock Keypad	<input type="checkbox"/>	
Use Daylight Savings	<input checked="" type="checkbox"/>	
Default Attendance Report To	Today	
Default Timecard Report To	This Pay	
Refresh Home Page Every	15	Minutes
Use SSL Server	<input type="checkbox"/>	
Use Popup Windows for Edits	Yes	
Show total hours at the clock	<input checked="" type="checkbox"/>	

3. Chapter 3: Setting Up Your Employees

, for additional information.

5. Check the **Hide Employee PIN** checkbox to hide employee PINs (ID numbers) at the time clock terminal, preventing coworkers from viewing another employee's PIN.
6. Use **System Prompt 1, 2, and 3** fields to set up to three custom prompts at the employee time clock terminal. The default system prompt on the time clock display is, *Enter PIN, Wave Badge*.

Companies often use this feature for employees that speak languages other than English and to send global messages to employees.

**Examples:**

Marque Su Numero  
Work Safely  
Closed Tomorrow

7. Type a unique 6-digit security code in the **Supervisor Code** field to secure the employee time clock.

<b>Important:</b> You need this code to access Supervisor Mode on the employee time clock. The default supervisor code is 00 00 00.
---

8. Check the **Lock Keypad** checkbox to lock the keypad and prevent keypad entry of employee ID numbers (PIN) at the employee time clock. Use this option if you purchased proximity badges and you do not want employees using the keypad.
9. Check the **Use Daylight Savings** checkbox if you want the time clock to automatically adjust time for daylight savings.
10. Select the default time frame to view the Attendance Report screen from the **Default Attendance Report To** drop-down menu.
11. Select the default time frame to view the Timecards Report screen from the **Default Timecard Report To** drop-down menu.
12. Type the number of minutes to refresh the alerts on the Home page in the **Refresh Home Page Every** field. If your system runs slow, type a larger number for the refresh time.
13. SSL data encryption ensures that all data passed between the time clock and web browser remains private. Check **Use SSL Server** to enable this option.

**Note:** You cannot enable SSL with a direct USB connection to the computer. The time clock must be connected to the network.

14. Use Popup Windows for Edits includes 3 options:
15. **Yes** - have a separate pop-up window display when editing a punch in a report screen.
16. **Yes with Batch Edits** – uses the pop-up window described above. Report will not refresh with each change submitted. You must refresh the page to see the report with the edited punches.
17. No
18. Check the **Show total hours at the clock** checkbox to display the employee’s total daily hours after the employee punches out.
19. Click **Submit** to save your settings and return to the Home page.

**Multi-clock Preferences:** Multi-clock refers to multiple time clocks connected together to share one database. For additional information on setting up multi-clock preferences, refer to

## Email / Backup Preferences:

The TotalPass Small Business Premium application allows payroll reports and system alerts to be automatically e-mailed to one or more supervisors. The system will send email alerts if an employee has a photo punch that needs verification, as employees come and go, before they accumulate overtime, if they leave early, and more.

**Note:** A Network connection is required to use email functionality in the clock.

In addition, backups of your time clock data can be automatically emailed to one or more recipients, daily, weekly or monthly.

**Important:** To send emails, you must have a SMTP server available. Contact your network administrator to find out if your company has a SMTP server. We recommend using Google's free Gmail account for companies that don't have an available SMTP Server. In order to use this service, you must have a Gmail account.

**What is an SMTP Server?** An SMTP server works like a postal assistant, handling the sending of emails from an email client to an email server. It receives outgoing mail messages from users and routes them to the intended mail recipients.

### Outgoing Email Settings (SMTP Server)

20. To assign your SMTP server settings, go to Device Preferences by clicking **Settings | Preferences | Device** find **Email/Backup Preferences**.

1. Type your complete SMTP e-mail server address in the **SMTP Server Address** field. If you do not have this information, contact your network administrator or your service provider.
2. If you enable SSL, you may need to specify the mail server port by entering a colon and then the port number after the server address.

**Example:** smtp.gmail.com:587 connects to smtp.gmail.com and uses port 587. If a port number is not defined, default port number 25 is used.

EMAIL/SMTP PREFERENCES	
SMTP Server Address	<input type="text"/>
Use SSL	<input checked="" type="checkbox"/>
Use STARTTLS	<input checked="" type="checkbox"/>
Use Authentication	<input checked="" type="checkbox"/>
Username/Email Address	<input type="text"/>
Password	<input type="password"/>
From Email Address	<input type="text" value="your_time_clock@time"/>
Email Backups To	<input type="text"/>
Send Backups	Monthly ▼



3. Check the **Use SSL** checkbox to use data encryption when sending e-mails. Using SSL may be a requirement for some SMTP server providers and may require that you define the SMTP port.
4. Check the **Use STARTTLS** checkbox if you are using SSL and your SMTP service provider requires that you first connect to the server using a secure connection.
5. Check the **Use Authentication** checkbox if your SMTP server requires a username and password to send e-mails.
6. Enter the **Username** or **Email Address** used to access your SMTP service (email account).
7. If you checked **Use Authentication**, enter the **Password** of your SMTP service,
8. Type the e-mail address you want to display in the **From** field in your e-mail in the **From Email Address** field. The default setting is Your\_Time\_Clock.

**EMAIL/SMTP PREFERENCES**

SMTP Server Address

Use SSL

Use STARTTLS

Use Authentication

Username/Email Address

Password

From Email Address

Email Backups To

Send Backups

9. Enter the email address where you would like a copy of your backups automatically sent to in the **Email Backups To** field.
10. Select how often you would like those backups emailed; never, daily, weekly, or monthly. Emails will be sent at 2:30 am.

Refer to **Error! Reference source not found.** on page 67 to complete the Automatic Backup setup.

11. Click **Submit** to save your settings.

For your convenience, configuration settings for the most common SMTP Server providers are located in the following section.

### Common SMTP Server Settings

Refer to the list below to find the most common SMTP Servers and their configuration settings. If your Internet Service Provider (ISP) is not on the list below, contact your ISP or Network Administrator for configuration instructions.

#### Hotmail/Live/Outlook

**SMTP Server Address:** smtp.live.com:587  
**Use SSL:** checked  
**Use STARTTLS:** checked

**Use Authentication:** checked  
**Username/Email Address:** Account email address (user@hotmail.com)  
**Password:** account password  
**From Email Address:** account email address

#### Gmail

**SMTP Server Address:** smtp.gmail.com:587  
**Use SSL:** checked  
**Use STARTTLS:** checked  
**Use Authentication:** checked  
**Username/Email Address:** Gmail account email address (user@gmail.com)  
**Password:** Gmail account password  
**From Email Address:** Gmail account email address

#### Comcast

**SMTP Server Address:** smtp.comcast.net:465  
**Use SSL:** checked  
**Use STARTTLS:** un-checked  
**Use Authentication:** checked  
**Username/Email Address:** Comcast username  
**Password:** Comcast account password  
**From Email Address:** Comcast account email address

#### Verizon

**SMTP Server Address:** outgoing.verizon.net:587  
**Use SSL:** un-checked  
**Use STARTTLS:** un-checked  
**Use Authentication:** checked  
**Username/Email Address:** Verizon username  
**Password:** Verizon account password  
**From Email Address:** Verizon account email address

#### Apple MobileMe / iCloud

**SMTP Server Address:** smtp.mac.com:587  
**Use SSL:** user preference  
**Use STARTTLS:** if user selects to use SSL above  
**Use Authentication:** checked  
**Username/Email Address:** MobileMe/iCloud username  
**Password:** MobileMe/iCloud account password  
**From Email Address:** MobileMe/iCloud account email address

## Setting Your Alert Preferences

1. Select **Settings | Preferences** and click on the **Alert** tab to setup the alert notices displayed on the Home page. The Home page updates based on your time setting for the **Check Alerts Every** field described below.
2. Type the least amount of hours an employee can work per shift in the **Alert Low Hours at** field. If an employee works fewer hours than is specified, an alert generates. To disable this alert, set the alert value to **0**.
3. Type the amount of hours an employee can work per shift in the **Alert High Hours at** field. If an employee works a shift more than the hours specified, an alert generates. To disable this alert, set the alert value to **99**.
4. Type the maximum amount of hours an employee can work per shift in the **Maximum Punch Time at** field. If an employee works a shift more than the hours specified, an alert generates and the hours stop accumulating for that given shift. To disable this alert, set the alert value to **99**.

The screenshot shows the 'Alerts' tab in a settings interface. The title is 'ALERT PREFERENCES'. It contains several input fields with numerical values and labels on the right side. The fields and their values are: 'Alert Low Hours at' (0.00), 'Alert High Hours at' (14.00), 'Maximum Punch Time at' (40.00), 'Alert Day Overtime OT at' (2.00), 'Alert Week Overtime OT at' (8.00), 'Check Alerts Every' (15), 'Email Alerts Every' (15), 'Update Employee Hours Every' (15), and 'Email Daily Alerts at' (12:00a). The labels on the right are: 'Hours per punch', 'Hours per punch', 'Hours per punch', 'Hours remaining', 'Hours remaining', 'Minutes', 'Minutes', and 'Minutes'.

Field	Value	Label
Alert Low Hours at	0.00	Hours per punch
Alert High Hours at	14.00	Hours per punch
Maximum Punch Time at	40.00	Hours per punch
Alert Day Overtime OT at	2.00	Hours remaining
Alert Week Overtime OT at	8.00	Hours remaining
Check Alerts Every	15	Minutes
Email Alerts Every	15	Minutes
Update Employee Hours Every	15	Minutes
Email Daily Alerts at	12:00a	

5. **Alert Day Overtime OT at** triggers an alert before employees reach daily overtime by using the daily overtime value that you set under Overtime Preferences.

**Example:** If you have Day OT1 set to 8 hours and Alert Day Overtime OT set to 2 hours, an alert posts to the Home page when the employee reaches 6 hours worked for the day.

6. **Alert Week Overtime OT at** triggers an alert before employees reach weekly overtime by using the weekly overtime value that you set under Overtime Preferences.

**Example:** If you have Week OT1 set to 40 hours and Alert Week Overtime OT set to 8 hours, an alert posts to the Home page when the employee reaches 32 hours worked for the week.

7. Type the number of minutes to check alerts in the **Check Alerts Every** field. New alerts are checked and posted to the Home page based on the time entered here. To maximize system speed and performance, we recommend setting this value to 10 minutes or more.
8. Click **Submit** to save your settings and return to the Home page.

For additional Alert configuration, select **Settings | Alert Setup**.

## Alert Setup

Using the Alert Preferences set earlier, select **Settings | Alerts Setup**, and follow the instructions below to set up Home page and email alerts.

<input checked="" type="checkbox"/>	DESCRIPTION	LIFETIME
<input checked="" type="checkbox"/>	High Hours	1 Day ▼
<input checked="" type="checkbox"/>	Low Hours	1 Day ▼
<input checked="" type="checkbox"/>	Maximum Hours	1 Day ▼
<input checked="" type="checkbox"/>	Approaching Daily Overtime	1 Day ▼
<input checked="" type="checkbox"/>	Approaching Weekly Overtime	1 Day ▼
<input checked="" type="checkbox"/>	Check for Updates	Forever ▼
<input checked="" type="checkbox"/>	Backup Reminder	1 Week ▼
<input checked="" type="checkbox"/>	Punch Notify	1 Hour ▼

CUSTOM FIELD PREFERENCES

Title for Field 1: Emergency Contact  
Assign Field 1 to: Employee ▼

Title for Field 2: Alternate Phone #  
Assign Field 2 to: Employee ▼

- **Enabling/Disabling Alerts:** To disable an alert, deselect the checkbox in the far left column. This prevents the alert from being posted on the Home page
- **Lifetime:** Use the drop-down menus under the **Lifetime** column to select the amount of time the alert remains on the Home page. After that time, the alert is automatically removed.

## Creating Custom Fields

TotalPass offers 10 additional fields for tracking static information in Custom Fields.

In addition, Timecard reports can be filtered based on the Custom Field values assigned to an employee with Labor Distribution Reports.

Examples:

- Location
- Account
- Part Time / Full Time Status

**ADP EXPORT:** Use the Custom Field to track the employee's ADP Payroll ID. Refer to the ADP Export User Guide installed with the ADP Payroll Export for instructions.

Custom Fields values can be added to the following locations.

- **System:** These fields display on the bottom of the Custom Fields page.

- **Employee:** These fields display on the bottom of each employee's Edit Employee page.
- **Department:** These fields display on the bottom of the Edit a Department page

Follow the instructions below to set your Custom Fields.

1. Type the title for the custom information in the **Title for Field X** field (X being the field number).
2. Select where this custom field should display from the **Assign Field X to** drop-down menu (X being the field number).
3. Click **Submit** to save your settings and return to the Home page.
4. Go to the new custom field on the page specified and enter information as needed.

For additional information on generating reports based on the custom field value assign to an employee, refer to [Chapter 6: Generating Reports](#).

# Chapter 3: Setting Up Your Employees

After setting up your pay period and other preferences, set up the employees in the system.

- ✓ Adding employees
- ✓ Setting up automatic lunch deductions
- ✓ Set up Web Punch entry

TotalPass Small Business Premium comes with a 50 employee limit and can be upgraded to handle up to a total of 500 employees.

## Employee List

A list of your employees and their ID numbers are in the Lists Menu under Employees. Click on the column header to sort by that particular column.

EMPLOYEE LIST											
Select All	Select None	Show Inactive	Columns							Employees: 45 Active 5 Inactive	
Active	Payroll ID	Display ID	Last Name	First Name	M.I.	Web Punch	Time Remaining Before Overtime				
							Daily	Weekly	Consecutive Days		
<input checked="" type="checkbox"/>		0101	Employee 0101				8.00	40.00	7		
<input checked="" type="checkbox"/>		0123	Employee 0123				8.00	40.00	7		
<input checked="" type="checkbox"/>		0145	Employee 0145				8.00	40.00	7		
<input checked="" type="checkbox"/>		0167	Employee 0167				8.00	40.00	6		

## Make Employees Inactive

Making an employee inactive removes them from the Employee List and hides the employee data from the reports, their punch data remains stored in the time clock.

- To make an employee inactive, deselect the checkbox in the far left column, click **Submit**.
- To select all employees, and make them active, click on **Select All**.

- To make all employees inactive, click **Select None**.
- To show inactive employees, click on the **Show Inactive** option.

## Customizing the Columns

- Select the **Columns** link to hide or show columns on the Employee List.
- Click on the column header to sort by a particular column.

Select All				Select None				Show Inactive				Columns			
<input checked="" type="checkbox"/>	<b>Active</b>	<input checked="" type="checkbox"/>	Payroll ID	<input checked="" type="checkbox"/>	Display ID	<input checked="" type="checkbox"/>	Las	<input checked="" type="checkbox"/>	Active	<input checked="" type="checkbox"/>	Payroll ID	<input checked="" type="checkbox"/>	Display ID	<input checked="" type="checkbox"/>	Last Name
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	2198	<input checked="" type="checkbox"/>	2198	<input checked="" type="checkbox"/>	Emp	<input checked="" type="checkbox"/>	Display ID	<input checked="" type="checkbox"/>	Last Name	<input checked="" type="checkbox"/>	First Name	<input checked="" type="checkbox"/>	M.I.
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	2208	<input checked="" type="checkbox"/>	2208	<input checked="" type="checkbox"/>	Emp	<input checked="" type="checkbox"/>	First Name	<input checked="" type="checkbox"/>	M.I.	<input checked="" type="checkbox"/>	Web Punch	<input checked="" type="checkbox"/>	Biometric
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	2240	<input checked="" type="checkbox"/>	2240	<input checked="" type="checkbox"/>	Emp	<input checked="" type="checkbox"/>	Web Punch	<input checked="" type="checkbox"/>	Biometric	<input checked="" type="checkbox"/>	Time Remaining Before Overtime	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	2249	<input checked="" type="checkbox"/>	2249	<input checked="" type="checkbox"/>	Emp	<input checked="" type="checkbox"/>	Biometric	<input checked="" type="checkbox"/>	Time Remaining Before Overtime	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	2254	<input checked="" type="checkbox"/>	2254	<input checked="" type="checkbox"/>	Emp	<input checked="" type="checkbox"/>	Time Remaining Before Overtime	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

## Time Remaining Before Overtime

- The **Daily** column displays the number of hours left in the day before the employee starts earning daily overtime.
- The **Weekly** column displays the number of hours left in the week before the employee starts earning weekly overtime.
- The **Consecutive Days** column displays the number of days left in the work week before the employee starts earning consecutive day overtime, when this option is enabled in Pay Preferences.

To edit employee information, click the employee ID number in the **Display ID** column. This displays the **Edit an Employee** screen.

## Adding Employees

There are two options for adding employees to the time clock:

1. Importing a list of Employee's from a CSV file.
  - Follow the instructions in the Importing Employees to Your Time Clock guide located at:  
[http://www.icontime.com/images/docs/collateral/TotalPass\\_Employee\\_Import\\_Format.pdf](http://www.icontime.com/images/docs/collateral/TotalPass_Employee_Import_Format.pdf)
2. Adding each employee individually
  - To add your employees individually, select an employee or one of the available employee slots. Follow the instructions below to set up an employee.

## Employee Information

- **Payroll ID:** (Optional) Enter the employee's payroll ID # provided by the payroll company. This Payroll ID will be used when generating payroll exports.

**Note:** This field is not required to be completed when using the QuickBooks Plug-in or ADP Export Utility.

- **First Name:** Enter the employee's first name.
- **Middle Initial:** Enter the first initial of the employee's middle name.
- **Last Name:** Enter the employee's last name.
- **Display Name:** Enter the name that the employee will see at the clock and on reports.

**Note:** Timecard Reports are sorted by Display Name.

- **Address:** Enter the employee's address. This field is optional.

## Employee Settings

- **Display ID:** Type the assigned company Employee ID number or Payroll ID number, or PIN number. The Display ID is the number that will appear on the timecard reports.
- **PIN/Badges:** The employee PIN number is used to clock In or Out at the time clock. Type the custom PIN you want to assign to the employee. The default PIN length is set to four digits; you can customize the PIN length up to nine digits under **Device Preferences**.
- **Departments:** Select departments to assign to the employee. If you are tracking paid breaks, set the first department to **Break**.

Specify a wage the employee is paid for working in the assigned department.

If Employee Inputs are enabled under Punch Preferences, you will see an additional check box option in the departments table to track employee input.

Departments	DEPT	WAGE	TRACK TIPS	ORDER
	Break	0.00	<input type="checkbox"/>	1
	Dept 01	0.00	<input checked="" type="checkbox"/>	2
	Add Department	0.00	<input type="checkbox"/>	3

If you are assigning more than one department, specify the order that the departments will be displayed at the clock when the employee clocks In.

**Note:** If tracking breaks, the Break department will always be listed first.



For additional information on setting up departments, refer to [Chapter 5: Departments and Supervisors](#).

- **Active:** All employees default to an active status. Deselect this checkbox to make the employee inactive and to hide their name from reports.
- **Entry Method:** This option determines the procedure for punching in and out by the employee at the employee time clock. Select the desired method from the drop-down menu.

Review the description of the time clock entry methods below and choose your entry method carefully.

LUNCH TIME DEDUCTION		
Automatic Lunch Deduction	Enabled	
Lunch At	4.00	Hours
Lunch Length	30	Minutes
Deduct	Per Punch	

- **Validated:** The employee is required to either punch in or out at the employee time clock. The correct option blinks on the time clock display. The employee is required to press the correct key at that time.

**Example:** If an employee forgets to punch out the day before, they will be required to punch out first before they can punch in for their current shift. The punch information can be edited in the software so the proper punch out time and date is recorded on the reports.

- **Non Validated:** In and Out displays under the employee's name at the employee time clock. The employee is required to press the correct key at that time, either **In** or **Out**. Either entry is accepted by the employee time clock.
- **Automatic:** This is also known as "Swipe and Go". After the employee enters their PIN/badge number, the time clock displays the employee name and the message, "Entry Recorded". The employee is not allowed to make any other selections at the time clock. This provides a simple and quick method to punch at the time clock. You cannot make lunch overrides or hours adjustments to these types of punches. Refer to the [Adding a Punch](#) section on page 46 for additional information.

## Lunch Time Deduction

- Enable **Automatic Lunch Deduction** to automatically deduct the employee lunch time for the day or the punch pair.
- In the **Lunch At** field, enter the number of hours the employee is required to work before the lunch period automatically deducts from the employee's shift.
- Enter the amount of time in minutes to deduct for lunch (typically 30 to 60 minutes) in the **Lunch Length** field.

- Deduct:
- When **Per Punch** is selected the time worked from the last In punch is used to determine whether the **Lunch At** threshold has been met. If an employee goes to break or punches Out before the lunch time is deducted, the Lunch At calculation will start again once the employee has clocked In. Selecting this option will allow lunch time to be deducted multiple times per day.
- When **Per Day** is selected, the total amount of the employee's hours for the day will be added up to determine whether the **Lunch At** threshold has been met. Lunch deduction will occur once the threshold has been met.

Note:

Only one lunch deduction will occur per day when Deduct is set to Per Day.

Manually entering a lunch deduction will prevent an automatic lunch deduction from occurring that day.

## Web Punch Time Clock Settings

**Web Punch Time Clock Settings:** The TotalPass Small Business Premium provides licenses for 5 employees to punch In/Out using Web Punch. Additional licenses may be purchased. For

additional information on this option, refer to [Chapter 7: Sending](#)  
[to Payroll](#)

[TotalPass offers a few options for](#) streamlining your payroll process

[Creating](#) an export file

Emailing timecards reports

Sending individual timecards

Create Payroll Export File

At the end of the pay period, compile employee data and transmit to payroll for processing.

The Payroll report option creates a payroll export file for the following platforms:

Paychex Flex

Sure Payroll

Paychex Preview

Paycom

Paylocity

ADP Workforce Now

QuickBooks Online

The Payroll page allows you to download an export file to your PC or to email a copy of the Timecard report and the export file to one or more recipients

Note: Email functionality requires that the clock is connected via Ethernet and that the SMTP Preferences be set.

To create the export file, go to **Payroll | Export Payroll:**

Ensure that each of your employees has an assigned Payroll ID. Employees without a Payroll ID will not be included in the payroll export file.

Select [Click here](#) for a List of Employees without IDs.

Customize the **Payroll ID** for each of the listed employees.

Select **Create An Export** from the option What Do You Want to Do?

Select the timeframe from the drop-down menu.

Select your payroll provider in the Select your Export Format field.

Paychex Flex

SurePayroll

Paychex Preview

Paycom

Paylocity

ADP Workforce Now

QuickBooks Online

Press **Submit**.

Note: You are notified if any employees do not have an assigned Payroll ID. The message and the option to view a list of these employees' displays at the bottom of the Payroll report screen.

## QuickBooks Export Payroll process

Users can [use the Employees and Departments](#) list boxes to filter and choose which employee hours are exported.

Select Your Export Format QuickBooks Online

Select Employees Select All

- 0155, Aizcorbe, TeddyA, Teddy Aizcorbe
- 3810, Alvarez, Javielky, Javielky Alvarez
- 8278, AlvrzFacio, Lanie, Laniel Alvarez Facio
- 8517, Docteur, Ricknel, Ricknel Docteur

Select Departments Select All

- Break
- 1060BRICK RUNNER
- 1060BRICK SUPERV
- 5600 CONDOMINIUM
- ARTECITY
- ATRIUM CASHIER
- ATRIUM RUNNER
- AV HOSP SHUTTLE

Users will be able to review the data before submitting to QuickBooks Online.

**Review Data Before Submitting to QuickBooks Online** From 2017-12-17 Through 2018-01-05

Time Activities (13 Records)

Transaction Date	Employee Name	Hours	Minutes	Type
2017-12-17	Ricknel Docteur	13	0	Reg
2017-12-18	Javielky Alvarez	8	0	Reg
2017-12-19	Javielky Alvarez	7	30	Reg
2017-12-20	Javielky Alvarez	8	0	Reg
2017-12-21	Teddy A. Aizcorbe	7	30	Reg
2017-12-21	Javielky Alvarez	8	0	Reg
2017-12-22	Teddy A. Aizcorbe	7	30	Reg
2017-12-23	Teddy A. Aizcorbe	7	30	Reg
2017-12-28	Teddy A. Aizcorbe	7	30	Reg
2017-12-29	Teddy A. Aizcorbe	7	30	Reg
2017-12-30	Teddy A. Aizcorbe	7	30	Reg
2018-01-04	Teddy A. Aizcorbe	7	30	Reg
2018-01-05	Teddy A. Aizcorbe	7	30	Reg

Submit Cancel

The final confirmation screen will have a total of the time activities exported.

**Finished Export of Time Activities** From 2017-12-17 Through 2018-01-05

Time Activities

Transaction Date	Employee Name	Hours	Minutes	Type
No data available in table				

Submit Cancel Close

**Status:** Finished. 13 Time Activities Exported.

## Configuring Payroll

### Navigate to Payroll | **Configure Payroll**

Users will be able to configure payroll specific pay/earning codes.

This applies to Paylocity, ADP Worforce Now, and QuickBooks Online

#### CONFIGURE PAYROLL

Select Your Payroll Export

+

**Other Options**

Export Departments

Export Wages

## QuickBooks Online Configuration

QuickBooks configuration involves connecting to an online QuickBooks account and linking employees between QuickBooks and the time clock, or adding them from one application to the other if they don't exist yet.

Within the Configure Payroll screen, select the QuickBooks Online payroll export and then click on the **Connect to QuickBooks** button.

#### CONFIGURE PAYROLL

Select Your Payroll Export



Select a QuickBooks employee and a time clock employee and click on the **Link** button to link them between the two applications.

CONFIGURE PAYROLL

Select Your Payroll Export

QuickBooks Employees		
Last Name	First Name	Middle Name
Aizcorbe	Teddy	A
Alvarez	Yolanda	
Bebe	Bebe	
Doe	Jean	
ICON Test	ICON Test	
QA	Icon	
Testing	Testing	

Time Clock Employees			
Last Name	First Name	MI	PIN
Abdoud Massoud	Raed		1215
Abrante	Jose	I	3807
Aguiar	Andy		0145
Aizcorbe	Teddy	A	0155
Altamirano	Anax		2804
Alvarez	Javielky		3810
Alvarez Facio	Laniel	L	8278

Linked Employees		
QuickBooks Employee Name	Time Clock Employee Name	PIN
No data available in table		

Linked employees will be displayed at the bottom in the Linked Employees list box.

CONFIGURE PAYROLL

Select Your Payroll Export QuickBooks Online

QuickBooks Employees

Last Name	First Name	Middle Name
Bebe	Bebe	
ICON Test	ICON Test	
QA	Icon	
Testing	Testing	

[Add to Clock](#)

Time Clock Employees

Last Name	First Name	MI	PIN
Abdoud Massoud	Raed		1215
Abrante	Jose	I	3807
Aguiar	Andy		0145
Altamirano	Anax		2804
Alvarez Facio	Laniel	L	8278
Angeles	Luis	A	3385
Apolinario Castillo	Orlando	J	4089

[Add to QuickBooks](#)

Linked Employees

QuickBooks Employee Name	Time Clock Employee Name	PIN
Jean Doe	Ricknel Docteur	8517
Teddy A Aizcorbe	Teddy A. Aizcorbe	0155
Yolanda Alvarez	Javielky Alvarez	3810

[Remove Link](#)

Employees that don't have a matching entry in either system can simply be added by highlighting them and clicking on either **Add to Clock**, or **Add to QuickBooks**. Linked employees can be unlinked by highlighting them and clicking **Remove Link**.

## **Accrual Settings (Upgrade Required)**

**Accrual Settings:** used with the benefit tracking and accruals feature included with the Benefit Tracking upgrade. Benefit Accruals allow you to track and manage Vacation, Sick, and Personal Time benefits. Benefit Tracking and Accruals allow you to automate maximum accrual amounts, yearly carryover, and borrowing of benefits.

## **Delete Employee's Punches**

**Delete All Punches for this Employee:** This is typically used when an employee leaves the company and you want to re-use the employee ID (PIN).

1. To delete the employee's punches, click **Delete all punches for this employee**.
2. Click **OK**.

<b>Note:</b> Before purging employee punches, we recommend that you save a backup of your data. This allows you to view that employee's data at a later date.
---

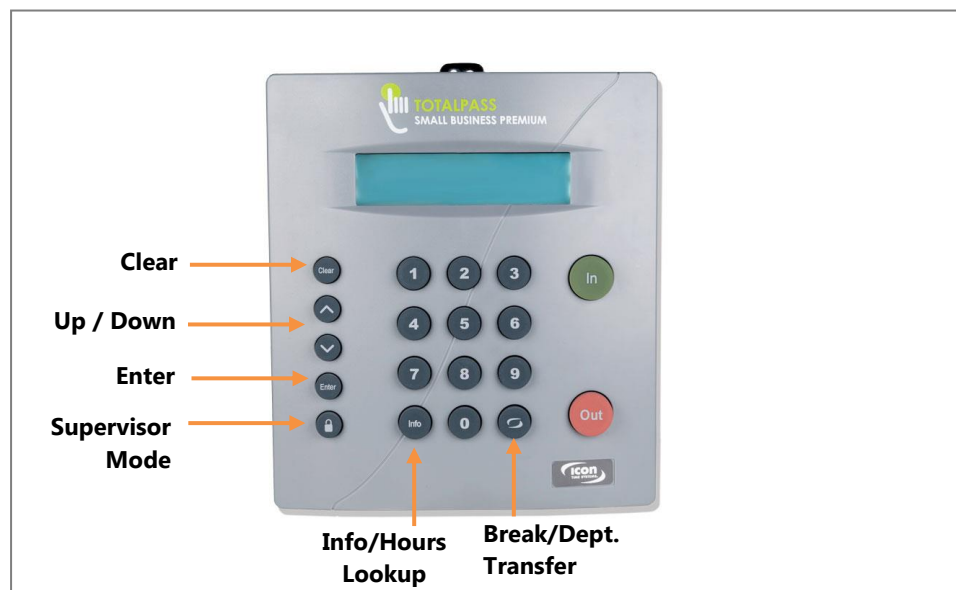
# Chapter 4: Clocking In and Out

---

This section describes employee functionality at the clock including:

- ✓ How to clock In and Out with a PIN, proximity badge, or through the web browser
- ✓ Transfer to break or another departments
- ✓ Entering Tips and Job numbers

## Time Clock Keypad Functions



- **Clear** - Returns user to the previous menu option.
- **^** or **∨** - Used to scroll up or down through menu options.
- **Enter** - Selects and saves menu options.
- **Supervisor Mode** - Allows supervisor to access advanced time clock terminal options.



- **Info** - Displays daily and weekly hourly totals for the employee.
- **Break/Dept. Transfer** - Used by the employee to transfer into a Department or Paid Break.
- **In/Out** - Used by the employee to punch IN or OUT.

## Punching In and Out

The employee procedure to punch In and Out at the time clock may vary depending on the entry method selected.

### Proximity Badge Entry

Refer to [Chapter 8: Alternate Employee Entry Options](#) for instructions on assigning proximity badges to your employee(s) and for instructions on clocking In/Out using proximity badges.

### Web Punch Time Clock Entry

For instructions on assigning Web Punch Time Clock licenses, refer to [Chapter 8: Alternate Employee Entry Options](#) for instructions on using the Web Punch Time Clock.

## Tracking Paid Breaks

The TotalPass system allows better management of employee paid breaks. Tracking paid breaks allows you to better manage the time your employees are taking during their paid break periods.

**Note:** This option must be activated for each employee, as discussed in

To track time that an employee spends on their paid break, the employee must be assigned to the break department and must transfer into the break department.

To transfer into the break department, follow the instructions below. The employee must already be punched In to the employee time clock.

1. Enter the assigned PIN/badge number on the time clock terminal, or wave the proximity badge in front of the number pad.
2. Instead of pressing Out, press the **Break/Department Transfer** key on the time clock.
3. A message stating "*Going To... Break*" displays on the time clock. To clock into break, press **Enter**. This punches the employee out of the work department and into the break department.

To transfer out of the break department and back to work:

1. Enter your PIN/badge number at the time clock terminal, or wave the proximity badge in front of the number pad.
2. Instead of pressing In or Out, press the **Break/Department Transfer** key on the time clock.
3. A message stating *Going To... Break* displays on the time clock. Press **Up** or **Down** to select the work department. To punch out of break and into work, press **Enter**. This punches the employee out of the break department and into the work department.

## Department Change (Punch In and Transfer)

The TotalPass Small Business Premium can track time spent by an employee in a particular department. Employees can be assigned to multiple departments and will be prompted to select their department when punching In.

Once the employee has been assigned to their departments, follow the instructions below for transferring to the department.

1. Enter the assigned PIN/badge number at the time clock or wave the proximity badge in front of the number pad, then press **In**.
2. Use the **Up** or **Down** key to select the applicable department.

3. Press **Enter**.

By pressing the **Break/Department Transfer** key, the employee has the ability to quickly transfer from one department to another.

1. If an employee needs to punch out of one department and into another department, enter the assigned PIN/badge number at the time clock or wave the proximity badge in front of the keypad, then press the **Break/Department Transfer** key.
2. Use the **Up** or **Down** keys to select the desired department. Press **Enter** to punch into that department. The employee is automatically punched out of the previous department.

## Entering Tips, Job Numbers or Piece Counts

The TotalPass Small Business Premium allows an employee to enter additional data at the clock (Employee Inputs) on either an In or Out punch. Employee Inputs are used to track employee tips, piece counts, or job numbers. This optional data will be recorded on the Timecard Report.

Follow the instructions below to collect employee input data on the In punch.

<b>Note:</b> This option must be activated under Setting Your Punch Preferences and for each individual employee, as discussed in Chapter 3: Setting Up Your Employees.
---

### Collecting Employee Inputs on an In Punch

1. Enter the assigned PIN/badge number at the time clock or wave the proximity badge in front of the number pad, then press **In**.
2. If multiple departments are assigned, use the **Up** or **Down** key to select the applicable department.
3. Press **Enter**.
4. When prompted, enter the Employee Input value.
5. Press **Enter**.

### Collecting Employee Inputs on an Out Punch

1. Enter the assigned PIN/badge number at the time clock or wave the proximity badge in front of the number pad, then press **OUT**.

2. Press **Enter**.
3. When prompted, enter the Employee Input value.
4. Press **Enter**

# Chapter 5:

# Departments and Supervisors

---

- ✓ Track employees' time by department
- ✓ Assign an employee to a supervisor with custom supervisor permissions

## Departments

The TotalPass Small Business Premium system has the ability to track and report labor on a departmental level. Hours worked and labor costs are included in these reports. Overall the system supports up to 99 different departments and each employee can be assigned to one, multiple or all 99 departments.

### Customize Your Departments

To view the departments list, select **Lists | Departments**. Click an available department in the Department column to open the Edit A Department screen.

1. Type a name for the department in the **Department Name** field.
2. All departments default to Active status. Uncheck the **Active** checkbox to make them inactive.

**Note:** Departments with assigned employees are unable to be made inactive. Click on the **Employee Count** value to see a list of employees assigned to the department.

3. Enter any notes to be associated with this department in the **Note** field.
4. If exporting department hours to a payroll program, enter the **Department Code** provided by your payroll provider.

**Note:** The QuickBooks Plug-in and the ADP Payroll Export utility do not offer this feature.

- If you have purchased the Benefit Tracking upgrade, you have the option to set Revision Zones by department. Revision Zones round punch hours to the start and end times of a specific shift. For additional information, refer to [Revision Zones](#) on [page 87](#).
- Click **Submit**.

## Assigning/Changing Departments

Each employee is automatically assigned to the first department in the list and must be assigned to at least one department. Follow the instructions below to assign a department(s) to an employee.

- Select Lists | Employee.
- Select an employee. On the Edit an Employee screen, locate the Departments table.

EMPLOYEE SETTINGS															
Display ID	0001														
PIN/Badges	0001														
Departments	<table border="1"> <thead> <tr> <th>DEPT</th> <th>WAGE</th> <th>TRACK TIPS</th> <th>ORDER</th> </tr> </thead> <tbody> <tr> <td>Dept 01</td> <td>0.00</td> <td><input checked="" type="checkbox"/></td> <td>1</td> </tr> <tr> <td>Add Department</td> <td>0.00</td> <td><input type="checkbox"/></td> <td>2</td> </tr> </tbody> </table>	DEPT	WAGE	TRACK TIPS	ORDER	Dept 01	0.00	<input checked="" type="checkbox"/>	1	Add Department	0.00	<input type="checkbox"/>	2		
DEPT	WAGE	TRACK TIPS	ORDER												
Dept 01	0.00	<input checked="" type="checkbox"/>	1												
Add Department	0.00	<input type="checkbox"/>	2												
Active	<input checked="" type="checkbox"/>														
Entry Method	Validated														

- Select the department to assign to the employee, from the drop-down menu.
- If you are assigning more than one department, enter the order that the departments display at the time clock when the employee punches in.
- If tracking Employee Inputs for an employee, in one or more departments, click the check-box enabling Employee Input tracking.
- The **Add Department** option automatically populates with additional departments.
- Click **Submit** at the bottom of the screen to save your changes.

**Note:** If employees punch for break, the break department is at the top of the list and does not have an order number.

## Removing a Department

To remove a department, select **Remove Department** from the drop-down menu in place of an existing department.

**Note:** Employees who are assigned the Automatic Entry Method in the program are not able to select departments at the employee time clock terminal.

## Supervisors

The TotalPass Small Business Premium allows for each supervisor to have their own separate time clock software login. Supervisors can be assigned unique permissions settings to access different areas of the system and specific employees.

### Setting Supervisor Permissions

Follow the instructions below to setup your supervisors.

1. Select Lists | Supervisors.
2. Click Add Supervisor.
3. Type the supervisor's Username, Supervisor's First and Last Name, and Password in the applicable fields.
4. Designate the access Permission Level and Permission Type using the radio buttons.
  - Click **No Access** to make the area off limits for the supervisor.
  - Click **Full Access** to give the supervisor permission to create, edit, and view transactions in that area.
  - Click **Read Only** to allow the user to only view the data in that area. Edits are not allowed.
5. Once complete, click **Submit** to save user settings.

Permission Level			Permission Type		
Level 1	Level 2	Level 3	Full Access	Read Only	No Access
<b>Reports</b>			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Punches			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Lists</b>			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wages			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Departments			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clocks			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supervisors			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Settings</b>			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preferences			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alerts			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Files</b>			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Backup			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Restore			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Update			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Delete Old Punches			<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

After setting up a new supervisor account, it is recommended to assign employees to the supervisor. If you chose not customize the supervisors assigned employees, they will have access to *all employees* by default.

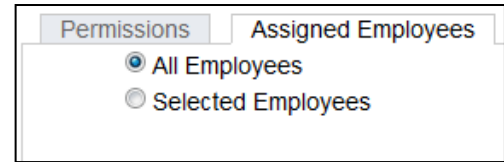
**Note:** Once you click Submit, you cannot change the username. To change the username, you must create a new supervisor account and delete the old one.

### Assigning Employees to a Supervisor

Supervisors can be given restricted access to view and edit data for only those employees assigned directly to them. They will also receive Home page and email alerts for only their assigned employees.

1. Select Lists | Supervisors.

2. Select the appropriate supervisor from the list.
3. From the Edit a Supervisor page, select **Assigned Employees**.
4. Select one of the available options:



- Select **All Employees** to assign all employees to the supervisor.
- Select **Selected Employees** to assign specific employees to the supervisor. Selecting this will display additional options allowing you to assign individual employees to the supervisor.

5. The **Unassigned Employees** column displays a list of available employees that are not currently assigned to the supervisor.
6. The **Assigned Employees** column displays a list of employees that have been assigned to the supervisor.



7. Select an employee(s) in the **Unassigned Employees** column, click > to move them to the **Assigned Employees** column.
8. Select an employee(s) in the **Assigned Employees** column, click < to move them to the **Unassigned Employees** column.
9. Click **Select All** to select all employees in the column.
10. Click **Select None** to deselect the employees in a column.
11. Use the **Filter by Department** drop-down menu to filter the **Unassigned Employees** column by department assignment.
12. Select **View All Assigned Employees** to generate a report of employees that have been assigned to the supervisor.
13. Click **Submit** to save your settings.

## Supervisor Login

To login to the time clock application as a new user, follow the instructions below.



- At the employee time clock Login page, have the new user enter their username and password in the applicable fields. Click **Submit** to log in to the time clock software.

If a supervisor attempts to access an unauthorized page or tries to edit a page with Read Only access, an Access Denied error message displays.

# Chapter 6:

## Generating Reports

---

- ✓ Overview of the reporting options
- ✓ Adding and editing punches
- ✓ Entering Holiday and Non-work time

Reports in your application are designed to be intuitive to read and edit; this creates ease and simplicity when generating your reports on payroll day.

### Reports Overview

TotalPass Small Business Premium Proximity comes with the following standard reports:

- **Attendance Report** displays all employee punch data sorted by date.
- **Timecards Report** displays punches and hours sorted by employee.
- **Individual Employee Timecard** displays one individual employee timecard at a time.
- **Department Report** shows punches and hours sorted by Department.
- **Timecards by Department** lists employee punches and hours sorted first by employee, then by department.
- **Create Report** allows you to customize the report based on employee, date, time, departments, and custom field values assigned to an employee.

### Adding a Punch

From a report screen, click **Add Punch**.

DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL
03/07/16	Mon 07:56a	Manufacturing	Mon 04:30p	30min		8:00				8:00
03/08/16	Tue 08:00a	Manufacturing	Tue 04:32p	30min		8:00				8:00
<b>Totals: (Format: Minutes)</b>						<b>16:00</b>				<b>16:00</b>

Perform the following when adding a punch:

1. Confirm or select the correct employee.
2. Select the punch type to add from the **Type** drop-down menu.
- Automatic allows the time clock to select the appropriate punch type.
- When adding or editing an Automatic punch in the **TIME OUT** column, change the punch type from Automatic to Out, to add a lunch or hours adjustment.
3. Click in the **Date** field to use the calendar to select the punch date.
4. Type the time for the punch in the **Time** field. The application assumes a.m. unless otherwise specified.
5. For In punches, select the department from the **Department** drop-down menu.
6. For an Out punch, you have the option to enter an additional lunch deduction. Type the number of minutes for the employee lunch deductions in the **Lunch** field.
7. For an Out punch, you have the option to enter an additional time adjustment. Type positive or negative values to adjust time for the shift in the **Adjust** field.
8. Type any applicable notes in the **Note** field. You have an additional option to print notes that coincide with each particular punch. This feature is often used to track an event that happened with that punch. A plus sign (+) accompanies that punch.

0023-Sandra										
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL
01/19/15	Mon 06:00a	Office	Mon 02:30p	30min		8:00				8:00
01/20/15	Tue 06:04a	Office	Tue 02:23p	30min		7:49				7:49
01/21/15	+Wed 09:00a	Office	Wed 06:00p	30min		8:30				8:30
	<b>NOTE: Arrived late</b>									
01/22/15	Thu 06:07a	Front Desk	Thu 02:31p	30min		7:54				7:54
01/23/15	Fri 05:55a	Front Desk	Fri 02:31p	30min		7:47	0:19			8:06
<b>Totals: (Format: Minutes)</b>						<b>40:00</b>	<b>0:19</b>			<b>40:19</b>

9. Click **Submit** to save your changes.

## Adding Non-Work Hours (Holiday and Non-Worked)

A non-work punch is a punch where the employee was not actually working, but was using benefit time like holiday or jury duty.

Non-work hours can be assigned to one or more employees across one or more days.

Perform the following when adding a non-work punch:

1. Select **Add Non-Work** from the Timecard report.
2. Select the employee(s) from the **Select Employees** list.
3. Select the applicable punch type that you want to add from the **Type** drop-down menu.

The available punch types are:

- **NonWorked** – used for employees working off site or other benefit time.
  - **Holiday**
4. Click in the **Start Date** field and use the calendar to select the date when the non-work hours should begin.
  5. Type the number of days to assign to the employee(s) in the **Number of Days** field.
  6. Type the number of hours to assign to the selected employee(s), for each day, in the **Hours Per Day** field.
  7. If you have selected only one employee, select the department to assign the non-work hours in the **Department** drop-down menu. If you have selected more than one employee, the Department field will auto-populate and hours will be assigned to each employee's default department.
  8. Type any applicable notes in the **Note** field. You have an additional option to print notes that coincide with each particular punch. You can use a NOTE to describe the type of non-worked benefit hours used. A plus sign (+) accompanies that punch. Click (+) to make the note visible.
  9. Click **Submit**, you will be directed to the Add Non-Work Hours Confirmation page.
  10. Review the information on the Add Non-Work Hours Confirmation page for accuracy.
- Click **Submit** to save your changes.
  - Click **Cancel** to cancel the transaction.
  - Click **Back** to go back to the Add Non-Work page and revise the data.

The screenshot shows a web form titled "ADD NON-WORK HOURS". On the left, there is a "Select Employees" section with a list box containing "0001-Jeff" and "0023-Sandra", and a "Select All" button. Below the list, it says "2 Employees Selected". To the right of the list box is a "Type" dropdown menu set to "Holiday". Below that are input fields for "Start Date" (01/23/15), "Number of Days" (1), and "Hours Per Day" (8). There is a "Department" field with the text "Applied To Employee's Default Dept." and a "Note" text area. At the bottom right, there are "Submit" and "Cancel" buttons.

## Editing a Punch

Modifying or editing a punch on the reports is simple.

1. Click on the In or Out time you want to edit. Each punch entry on the report is a link that will take you to the **Edit a Punch** window.
2. Follow the instructions in the [Adding a Punch](#) section to edit your punch data.

**Note:** All edited and manually entered punches will be flagged on the report with an 'E' next to the punch. Refer to [Setting Your Punch Preferences](#) for instructions on disabling this option.

TIME IN	DEPT
Mon 07:58a E	Front Desk

edited punch

### Using Batch Edits

Batch edits is an option selected in [Setting Your Device Preferences](#) on page 20. To use Batch Edits with pop-up windows, follow the instructions below.

1. Before editing punches, print the report for the pay period. Review which punches you need to edit.
2. In the Report screen, click the applicable punch you want to edit or add.
3. The Edit a Punch screen displays in a separate pop-up window.
4. Make the desired punch edit, then click **Submit**.
5. After editing all of the punches, click **Refresh** in the upper right of the report screen. The edited data displays on the report.

### Viewing Additional Reporting Details

Customizing your reports and viewing additional details on a report is uncomplicated.

The blue links in the reports are Web links that allow you to customize or view details of your data. Some reports have additional detail options.

DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL
<a href="#">03/07/16</a>	Mon 07:56a	Manufacturing	Mon 04:30p	30min		8:00				8:00
<a href="#">03/08/16</a>	Tue 08:00a	Manufacturing	Tue 04:32p	30min		8:00				8:00
<a href="#">03/09/16</a>	+Wed 08:00a	Manufacturing	Add Punch							
<b>Totals: (Format: Minutes)</b>						<b>16:00</b>				<b>16:00</b>

- **Edit Employee Info:** Click the employee's name in the Employee column of the report to edit an employee's details.
- **Select a Report Time Period:** To change the report timeframe, click the date link at the top upper left of the Report screen.

From: 03/07/16 Thru: 03/20/16 Add Punch Add Non-Work		Columns · Summary · Page Break · Daily · Notes · Exceptions · Refresh								
<ul style="list-style-type: none"> <li>· Today</li> <li>· This Week</li> <li>· This Pay Period</li> </ul>	<ul style="list-style-type: none"> <li>· Yesterday</li> <li>· Last Week</li> <li>· Last Pay Period</li> </ul>	<b>DEPT</b>	<b>TIME OUT</b>	<b>LCH</b>	<b>ADJ</b>	<b>REG</b>	<b>OT1</b>	<b>OT2</b>	<b>HOL</b>	<b>TOTAL</b>
From: 03/07/16 Thru: 03/20/16		Manufacturing	Mon 04:30p	30min		8:00				8:00
Employee: All		Manufacturing	Tue 04:32p	30min		8:00				8:00
Submit Cancel			Add Punch			16:00				16:00
<b>Grand Total: (Format: Minutes)</b>						16:00				16:00

- Click the appropriate predefined timeframe link or use the **From** and **Thru** date fields to enter a custom timeframe to run the report.
- Click **Submit** after entering custom dates.
- **Daily:** This option displays the total hours worked for each day in a report. This is convenient if the employee clocks in and out multiple times during the day.

**Note:** You can also click the date in the Employee column of the report to view daily totals for a specific day. Click the date again to hide the information.

- Select **Columns** to customize which columns display on the report.
- The report font size will automatically adjust to fit the page.
- The **Labor** option will display the calculated labor cost (pay), entered in the wage field in the Edit an Employee screen.
- **Exceptions:** Click this link to view punches that may require the attention of the payroll manager. Exception types and settings are found under [Setting Your Alert Preferences](#). Descriptions of the exception flags are listed below.

Columns ·	
<input checked="" type="checkbox"/>	Time In
<input checked="" type="checkbox"/>	Dept
<input checked="" type="checkbox"/>	Time Out
<input checked="" type="checkbox"/>	Lunch
<input checked="" type="checkbox"/>	Adjust
<input checked="" type="checkbox"/>	Regular
<input checked="" type="checkbox"/>	Overtime 1
<input checked="" type="checkbox"/>	Overtime 2
<input checked="" type="checkbox"/>	Holiday
<input checked="" type="checkbox"/>	Total
<input type="checkbox"/>	Labor
<input checked="" type="checkbox"/>	Jobs

<b>H</b>	Punch pair reached the Alert High Hours
<b>L</b>	Punch pair is below the Alert Low Hours
<b>M</b>	Punch pair reached the Alert Maximum Time

- **Refresh:** Click this link to update the report with all recent punch changes.

## Using the Attendance Report

To view the **Attendance Report**, go to **Reports | Attendance**. The **Attendance Report** is designed to give you a quick at-a-glance view of your employee's daily attendance. Most companies use this report to view who has clocked In or Out for the day.

Click on the date link in the upper left corner to choose the time period for the report. From the resulting page, you can perform edits.

ATTENDANCE REPORT											
From: 01/23/15 Thru: 01/23/15				Add Punch		Add Non-Work		Daily · Notes · Labor · Exceptions · Refresh			
EMPLOYEE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL	
01/23/15											
0023-Sandra	Fri 05:55a E	Front Desk	Fri 02:31p E	30min		7:47	0:19			8:06	
0001-Jeff	Fri 08:05a E	Front Desk	Fri 04:36p E	30min		8:01				8:01	
<b>Totals: (Format: Minutes)</b>						<b>15:48</b>	<b>0:19</b>			<b>16:07</b>	

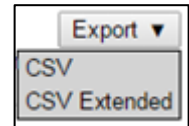
## Using the Timecard Report

This report includes reporting options not available on the Attendance Report. The Timecard Report allows you to run a report for one specific employee, or all employees. To view the Timecard Report, go to **Reports | Timecards**.

From: 03/07/16 Thru: 03/20/16				Add Punch		Add Non-Work		Columns · Summary · Page Break · Daily · Notes · Exceptions · Refresh			
0089-B_Jackson											
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL	
03/07/16	Mon 07:56a	Manufacturing	Mon 04:30p	30min		8:04				8:04	
03/08/16	Tue 08:00a	Manufacturing	Tue 04:32p	30min		8:02				8:02	
03/09/16	+Wed 08:00a	Manufacturing	Wed 04:35p	30min		8:05				8:05	
03/10/16	Thu 07:58a	Manufacturing	Thu 04:29p	30min		7:17				7:17	
03/11/16	Fri 08:00a	Manufacturing	Fri 04:32p	30min		8:02				8:02	
<b>Totals: (Format: Minutes)</b>						<b>39:30</b>				<b>39:30</b>	
0002-R_Jimenez											
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL	
03/07/16	Mon 07:04a	Service	Mon 03:30p	30min		7:56				7:56	
03/08/16	Tue 06:59a	Service	Tue 03:30p	30min		8:01				8:01	
03/09/16	Wed 07:03a	Service	Wed 03:30p	30min		7:57				7:57	
03/10/16	Thu 07:00a	Service	Thu 03:32p	30min		8:02				8:02	
03/11/16	Fri 07:00a	Service	Fri 03:36p	30min		8:04	0:02			8:06	
<b>Totals: (Format: Minutes)</b>						<b>40:00</b>	<b>0:02</b>			<b>40:02</b>	
<b>Grand Total: (Format: Minutes)</b>						<b>79:30</b>	<b>0:02</b>			<b>79:32</b>	

- To filter by employee or date, click the date link at the top of the report.
- Click **Summary** at the top of the Timecard Report to display a summary of total hours without the punch detail.

- Click **Page Break** at the top of the Timecard Report to create a page break between employee timecards. This also displays an employee signature line when you print timecards. This option is often used by companies that keep a printed record of employee time and to show employee timecard approval.
- Click **Export** at the top of the report to download the report in comma-delimited (CSV) format. The CSV export comes in two formats.
- **CSV** format includes relevant punch information for importing into payroll applications or editing in Microsoft Excel.
- **CSV (Extended)** format includes additional/internal punch information used for integration with third party applications.



## Using the Individual Timecard Report

The Individual Employee Timecard Report is used for reviewing and editing employee punches, one employee at a time. To view the Individual Employee Timecard Report, go to **Reports | Individual Empl Timecards**.

INDIVIDUAL EMPLOYEE TIMECARD REPORT												
< < 0001 - Jeff > >												
From: 11/01/15 Thru: 11/07/15 Add Punch Add Non-Work				Summary · Signature · Daily · Notes · Labor · Exceptions · Refresh								
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	VAC	SICK	PER	HOL TOTAL
11/02/15	Mon 07:58a	Front Desk	Mon 05:00p	30min		8.00	0.53					8.53
11/03/15	Tue 08:01a	Front Desk	Add Punch									
11/04/15	Wed 08:05a	Office	Wed 04:30p	30min		7.92						7.92
11/05/15	Thu 08:00a	Front Desk	Thu 04:32p	30min		8.00	0.03					8.03
11/06/15	Fr 07:45a	Office	Fr 04:59p	30min		8.00	0.73					8.73
<b>Totals: (Format: Hundredths)</b>						<b>31.92</b>	<b>1.30</b>					<b>33.22</b>

- To select an individual employee's timecard, select the employee through the drop-down menu.
- Skip forward, and backward by selecting the arrows on either side of the employee name.

## Using the Department Report

To view the Department report, hover over **Reports**, and then click **Department**. The Department report is designed to give you a report with a summary of hours worked per department.



## Using the Timecards by Department Report

To view the Timecards by Department report, hover your cursor over **Reports**, and then click **Timecards by Department**. This report is designed to give you a report of each employee's timecard, with hours grouped and totaled by department

023-Bill Smith									
Server									
DATE	TIME IN	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL
12/30/13	Mon 04:00p	Tue 12:30a	30min		8.00				8.00
12/31/13	Tue 04:25p	Wed 01:00a	30min		8.00	0.08			8.08
01/01/14	*Holiday							8.00	8.00
<b>Totals: (Format: Hundredths)</b>					<b>16.00</b>	<b>0.08</b>		<b>8.00</b>	<b>24.08</b>
Host									
DATE	TIME IN	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL
01/02/14	Thu 04:00p	Fri 12:22a	30min		7.87				7.87
01/03/14	Fri 03:39p	Sat 12:36a	30min		8.00	0.45			8.45
<b>Totals: (Format: Hundredths)</b>					<b>15.87</b>	<b>0.45</b>			<b>16.32</b>
<b>023-Bill Smith Total: (Format: Hundredths)</b>					<b>31.87</b>	<b>0.53</b>		<b>8.00</b>	<b>40.40</b>

## Creating Custom Reports

The application offers advanced report functionality, allowing you to filter reports by employees, dates, or by departments.

From the Navigation menu, go to **Reports**, and click **Create Report** from the drop-down menu.

To create a report, perform the following.

1. Select the type of report to run from the **Report Type** drop-down menu.
2. Select the time frame for the report from the **Time Frame** drop-down menu.
3. Under the **Select** drop-down menu you are given three options.
  - **All Punches** is the default selection and displays all punches for the selected time frame.
  - **By Time Range** allows you filter the report to show only those punches that fall between the selected time-range. This option is most often used when running reports for tardy arrival or early departures.

**CREATE A REPORT**

Report Type:

Time Frame:

Select:

From:

Thru:

Select Employees:

Select Departments:

- **Only Non-work** allows you to select only Non-work or benefit time. In addition, you are given the option to select which Non-work type, Holiday or non-worked, to display on the report.
- Select the employee(s) to view on the report from the Select Employees list, or click Select All to run a report for all employees.
- Select the department(s) to view on the report from the Select Departments list, or click **Select All** to run a report for all departments.

**CUSTOM FIELD PREFERENCES**

Title for Field 1

Assign Field 1 to

Note: Press Ctrl to select more than one employee or department.

4. After defining the parameters of your report, click **Submit**.

## Generating Reports on Custom Field Values – Labor Distribution

Timecard and Timecard by Department reports can be generated based on the custom field values assigned to an employee; this is often used for Labor Distribution reporting.

Common uses:

- Employee’s assigned location
- Billing account
- Part Time / Full Time Status

A maximum of 10 custom fields can be tracked.

Follow the instructions below to set up the custom fields. To demonstrate the proper setup, we will use the following example:

We would like to run a Timecard Report based on the employee’s assigned work status. We have the following 3 work statuses; Full Time, Part-Time, Contract

### Step 1: Set Up the Custom Field Title and Assignment

Create a title for the custom field. Do this under **Settings | Preferences | Custom Fields**. Be sure to assign the field to the Employee page.

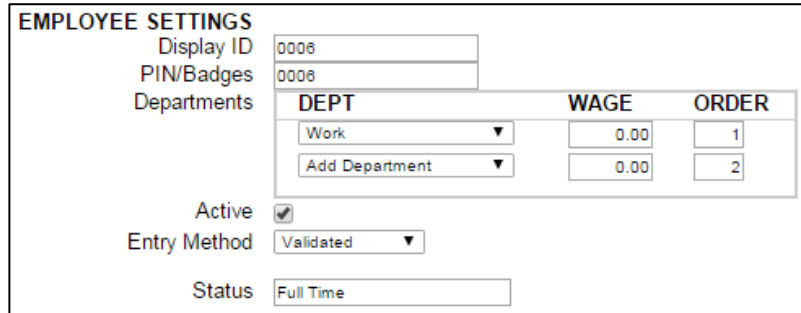
In our example, we will title the field *Status*.

## Step 2: Assign the Custom Field Value to the Employee

Go to **Lists | Employees** and find the employee(s) for which you would like to assign the custom field value. You will find the title of the custom field value under Employee Settings. Assign the custom field value for the employee, and press **Submit**.

Do this for each employee.

In our example, we will assign one of the following values to our employee; Full Time, Part Time, or Contract.



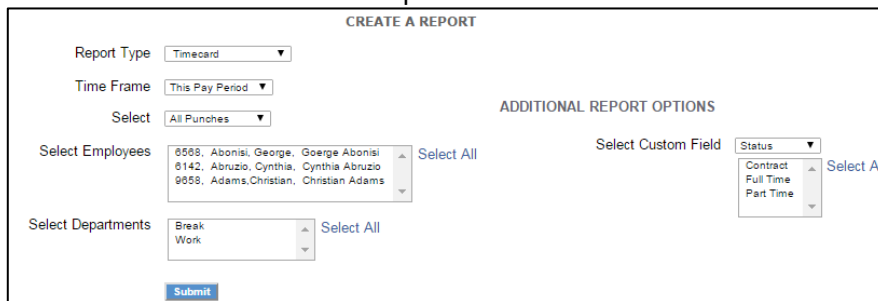
DEPT	WAGE	ORDER
Work	0.00	1
Add Department	0.00	2

**Note:** Custom Field Values are case sensitive and must match for each employee, for running reports.

## Step 3: Generate the Custom Report Using Create Report

To generate reports based on the assigned custom values go to **Reports | Create Report**. Select either the **Timecard** or **Timecard by Department** reports. When selecting one of these reports, *Additional Report Options* will appear.

- Select the Custom Field title. The unique custom values assigned to your employees will display.
- If you would like to filter the report results to one or more unique custom value, select those values and then press **Submit**.



**Note:** To select two or more values, hold down the Ctrl key as you make your selection.

# Chapter 7: Sending to Payroll

**TotalPass offers a few options for streamlining your payroll process**

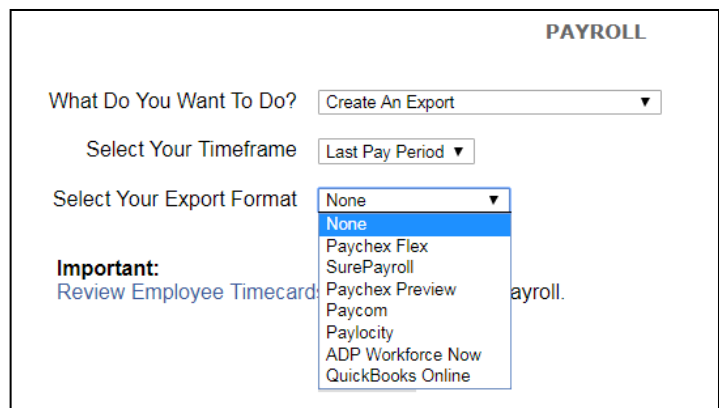
- ✓ Creating an export file
- ✓ Emailing timecards reports
- ✓ Sending individual timecards

## Create Payroll Export File

At the end of the pay period, compile employee data and transmit to payroll for processing.

The Payroll report option creates a payroll export file for the following platforms:

- Paychex Flex
- Sure Payroll
- Paychex Preview
- Paycom
- Paylocity
- ADP Workforce Now
- QuickBooks Online



The screenshot shows a web interface titled "PAYROLL". It contains three dropdown menus: "What Do You Want To Do?" with "Create An Export" selected, "Select Your Timeframe" with "Last Pay Period" selected, and "Select Your Export Format" with a dropdown menu open showing options: "None", "Paychex Flex", "SurePayroll", "Paychex Preview", "Paycom", "Paylocity", "ADP Workforce Now", and "QuickBooks Online". Below the dropdowns, there is an "Important:" section with a link "Review Employee Timecard" and the text "ayroll."

The Payroll page allows you to download an export file to your PC or to email a copy of the Timecard report and the export file to one or more recipients

**Note:** Email functionality requires that the clock is connected via Ethernet and that the SMTP Preferences be set.

To create the export file, go to **Payroll | Export Payroll:**

1. Ensure that each of your employees has an assigned Payroll ID. Employees without a Payroll ID will not be included in the payroll export file.

- Select **Click here** for a List of Employees without IDs.
  - Customize the **Payroll ID** for each of the listed employees.
2. Select **Create An Export** from the option What Do You Want to Do?
  3. Select the timeframe from the drop-down menu.
  4. Select your payroll provider in the **Select your Export Format** field.
    - Paychex Flex
    - SurePayroll
    - Paychex Preview
    - Paycom
    - Paylocity
    - ADP Workforce Now
    - QuickBooks Online
  5. Press **Submit**.

<b>Note:</b>	You are notified if any employees do not have an assigned Payroll ID. The message and the option to view a list of these employees' displays at the bottom of the Payroll report screen.
--------------	--

## QuickBooks Export Payroll process

1. Users can use the Employees and Departments list boxes to filter and choose which employee hours are exported.

Select Your Export Format QuickBooks Online

Select Employees

- 0155, Aizcorbe,TeddyA, Teddy Aizcorbe
- 3810, Alvarez,Javielky, Javielky Alvarez
- 8278, AlvrzFacio,Lanie, Laniel Alvarez Facio
- 8517, Docteur, Ricknel, Ricknel Docteur

Select All

Select Departments

- Break
- 1060BRICK RUNNER
- 1060BRICK SUPERV
- 5600 CONDOMINIUM
- ARTECITY
- ATRIUM CASHIER
- ATRIUM RUNNER
- AV HOSP SHUTTLE

Select All

2. Users will be able to review the data before submitting to QuickBooks Online.

**Review Data Before Submitting to QuickBooks Online** From 2017-12-17 Through 2018-01-05

Time Activities (13 Records)

Transaction Date	Employee Name	Hours	Minutes	Type
2017-12-17	Ricknel Docteur	13	0	Reg
2017-12-18	Javielky Alvarez	8	0	Reg
2017-12-19	Javielky Alvarez	7	30	Reg
2017-12-20	Javielky Alvarez	8	0	Reg
2017-12-21	Teddy A. Aizcorbe	7	30	Reg
2017-12-21	Javielky Alvarez	8	0	Reg
2017-12-22	Teddy A. Aizcorbe	7	30	Reg
2017-12-23	Teddy A. Aizcorbe	7	30	Reg
2017-12-28	Teddy A. Aizcorbe	7	30	Reg
2017-12-29	Teddy A. Aizcorbe	7	30	Reg
2017-12-30	Teddy A. Aizcorbe	7	30	Reg
2018-01-04	Teddy A. Aizcorbe	7	30	Reg
2018-01-05	Teddy A. Aizcorbe	7	30	Reg

3. The final confirmation screen will have a total of the time activities exported.

**Finished Export of Time Activities** From 2017-12-17 Through 2018-01-05

Time Activities

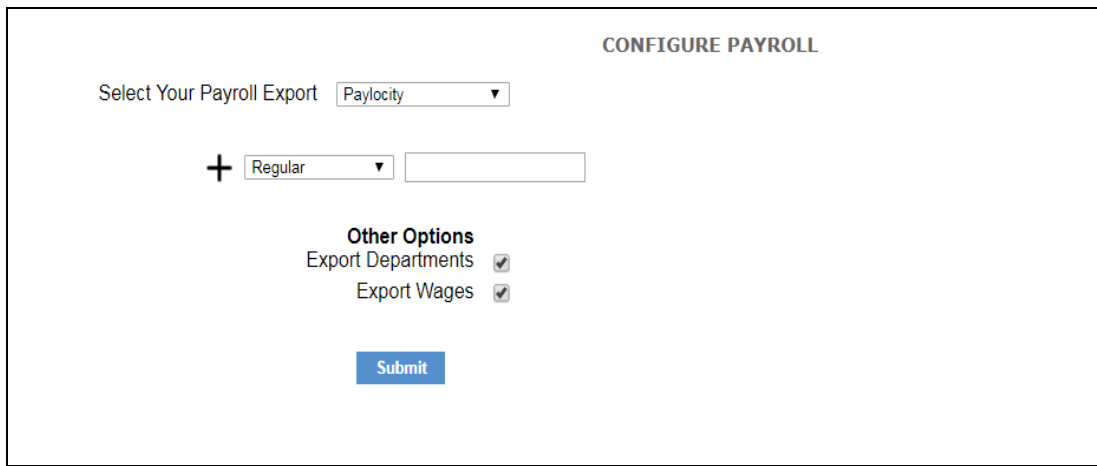
Transaction Date	Employee Name	Hours	Minutes	Type
No data available in table				

Status: Finished. 13 Time Activities Exported.

## Configuring Payroll

### Navigate to **Payroll | Configure Payroll**

1. Users will be able to configure payroll specific pay/earning codes.
2. This applies to Paylocity, ADP Workforce Now, and QuickBooks Online




The screenshot shows the 'CONFIGURE PAYROLL' interface. At the top right, the title 'CONFIGURE PAYROLL' is displayed. Below it, there is a label 'Select Your Payroll Export' followed by a dropdown menu currently set to 'Paylocity'. Underneath, there is a plus sign icon, a dropdown menu set to 'Regular', and an empty text input field. Below these elements, there is a section titled 'Other Options' with two checked checkboxes: 'Export Departments' and 'Export Wages'. At the bottom center, there is a blue 'Submit' button.

### QuickBooks Online Configuration

QuickBooks configuration involves connecting to an online QuickBooks account and linking employees between QuickBooks and the time clock, or adding them from one application to the other if they don't exist yet.

1. Within the Configure Payroll screen, select the QuickBooks Online payroll export and then click on the **Connect to QuickBooks** button.



The screenshot shows the 'CONFIGURE PAYROLL' interface. At the top right, the title 'CONFIGURE PAYROLL' is displayed. Below it, there is a label 'Select Your Payroll Export' followed by a dropdown menu currently set to 'QuickBooks Online'. Below this, there is a large green button with the QuickBooks logo and the text 'Connect to QuickBooks'.

2. Select a QuickBooks employee and a time clock employee and click on the **Link** button to link them between the two applications.

CONFIGURE PAYROLL

Select Your Payroll Export QuickBooks Online

Disconnect from QuickBooks

QuickBooks Employees

Last Name	First Name	Middle Name
Aizcorbe	Teddy	A
Alvarez	Yolanda	
Bebe	Bebe	
Doe	Jean	
ICON Test	ICON Test	
QA	Icon	
Testing	Testing	

Add to Clock

Time Clock Employees

Last Name	First Name	MI	PIN
Abboud Massoud	Raed		1215
Abrante	Jose	I	3807
Aguiar	Andy		0145
Aizcorbe	Teddy	A	0155
Altamirano	Anax		2804
Alvarez	Javelky		3810
Alvarez Facio	Laniel	L	8278

Add to QuickBooks

Link

Linked Employees

QuickBooks Employee Name	Time Clock Employee Name	PIN
No data available in table		

Remove Link

3. Linked employees will be displayed at the bottom in the Linked Employees list box.

CONFIGURE PAYROLL

Select Your Payroll Export QuickBooks Online

Disconnect from QuickBooks

QuickBooks Employees

Last Name	First Name	Middle Name
Bebe	Bebe	
ICON Test	ICON Test	
QA	Icon	
Testing	Testing	

Add to Clock

Time Clock Employees

Last Name	First Name	MI	PIN
Abboud Massoud	Raed		1215
Abrante	Jose	I	3807
Aguiar	Andy		0145
Altamirano	Anax		2804
Alvarez Facio	Laniel	L	8278
Angeles	Luis	A	3385
Apolinario Castillo	Oriando	J	4089

Add to QuickBooks

Link

Linked Employees

QuickBooks Employee Name	Time Clock Employee Name	PIN
Jean Doe	Ricknel Docteur	8517
Teddy A. Aizcorbe	Teddy A. Aizcorbe	0155
Yolanda Alvarez	Javelky Alvarez	3810

Remove Link

4. Employees that don't have a matching entry in either system can simply be added by highlighting them and clicking on either **Add to Clock**, or **Add to QuickBooks**.

5. Linked employees can be unlinked by highlighting them and clicking **Remove Link**.



# Chapter 8: Alternate Employee Entry Options

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## TotalPass offers various methods for employee punching

- ✓ Keypad with Custom PIN
- ✓ Proximity badge
- ✓ Web browser entry

## Web Punch Employee Entry

The Web Punch Time Clock allows you to capture your employees' time anytime, anywhere using a web browser from a device on the network (LAN, WAN) or Internet. The TotalPass Small Business Premium comes with a 15 employee Web Punch Time Clock license. For employees or supervisors to access the time clock application remotely, over the Internet, additional set up is required. Refer to [Chapter 14: Configure the Time Clock for Remote Access](#), for more details.

The Web Punch Time Clock also offers advanced functionality like IP location restrictions and GPS tracking to help better manage your employees' punches.

### Setting Up Your Employees - Web Punch Time Clock

Follow the instructions below to assign the employee to the Web Punch Time Clock.

1. Select **Lists | Employee List**.
2. Select an employee. The Edit an Employee screen displays.
3. Check the **Assign to Web Punch** checkbox to enable Web Punch for this employee.

WEB PUNCH TIME CLOCK SETTINGS	
Assign to Web Punch	<input checked="" type="checkbox"/>
Web Punch Password	<input type="text" value="1234"/>
Authorized IP Address(es)	<input type="text"/>
Allow Punch from Unauthorized IP	<input type="checkbox"/>
Use Global Authorized IP Address	<input checked="" type="checkbox"/>

4. Type a password for the employee to use when punching In/Out on the Web browser in the **Web Punch Password** field.
5. Type the IP address that this employee may punch from in the **Authorized IP Address(es)** field. Leave this field blank to allow the employee to punch from any IP address.
6. Check the **Allow Punch from Unauthorized IP** checkbox to allow the employee to punch from an unauthorized IP address, but have those punches flagged on the reports for review.
7. Check the **Use Global Authorized IP Address** check-box to allow an authorized IP address for all employees.
8. Click **Submit** to save your settings. Repeat the steps above to assign additional employees to Web Punch entry.

If you exceed your Web punch license limit, you will receive an error message stating that you do not have enough Web Punch Licenses available.

### Punching In/Out Using Web Punch Entry

Employees assigned to the Web Punch Entry can punch In/Out anytime, anywhere, using a web browser interface.

Follow the instructions below to punch in or out using the Web Punch Time Clock.

1. Open the employee time clock **Login** page.
2. Type the assigned PIN/badge number in the **Username/PIN** field.
3. Type the employee's assigned Web Punch password in the **Password** field.
4. Click **Submit**. The employee Web Punch screen displays.
5. Select the appropriate option (**Punch In**, **Punch Out**, or **Department Change**) to complete your punch.
  - If the employee has the ability to change departments, select the department.
6. Click **Confirm**.
  - After punching In or Out, the Web Punch screen lists the employee punch information.
    - **Week Hrs:** Lists the total hours the employee worked for the week.

- **Day Hrs:** Lists the total hours the employee worked for the day.
- **Punch Hrs:** Lists the total hours the employee worked for that punch pair.

## Clocking In/Out from GPS Enabled – Location Tracking

If an employee clocks In/Out using a web browser, additional punch information is available.

**Note:** A punch that includes GPS location information is flagged with a 'G' on the reports. By clicking on that punch you can view additional information provided by the phone's GPS.

### GPS Location

- **Latitude/Longitude:** The location of the employee when they created the punch.
- **Accuracy:** The accuracy of the coordinates given by the GPS.

**Example:** The accuracy of this punch is up to 372 feet. In other words, the employee was within a 372ft radius of the coordinates given.

- **Speed:** States how fast the employee was traveling when they created the punch.

By using Google Maps integration and clicking on the GPS link, you can view the location of the employee at the time of the punch.

### IP Address Restriction

Using IP Address Restriction, you can restrict employees from punching from unauthorized locations. This information can be flagged and tracked on your reports.

IP address restrictions are enforced by setting authorized IP addresses globally (company-wide) and/or by employee.

### Setting Authorized IP Addresses Globally

Global Authorized IP Address(es) assigns the IP address that all employees can use. . To set

Web Punch IP Address	10.1.10.2
Web Punch Browser	iPhone
GPS Location	Latitude: 45.822625 Longitude: -122.963483
	Accuracy: 541 feet (165.0 meters)
	Altitude: 705 feet (214.8 meters)

this, follow the instructions below.

1. Select **Settings | Preferences** and click the **Device** tab.
2. In the Global Authorized IP Address(es) field, enter the IP address(es) of the computer (or other web-enabled device) the employees are authorized to punch in/out on.
3. The authorized IP address can be listed in the following ways.
  - **Any IP Address:** Leave the field blank to allow employees to punch in/out from any IP address.

- **Multiple IP Addresses:** Put a comma between the authorized IP addresses to allow the employee to punch from any IP address listed.

**Example:** 192.168.3.6, 192.168.3.78

- **Range of IP Addresses:** The employee can punch at computers with an IP address that falls within the 30-45 range.

**Example:** 192.168.3.30-45

4. Click **Submit** to save your changes.

<b>Note:</b> If an employee is not restricted to punch In/Out from the Global Authorized IP Address, uncheck the Use Global Authorized IP Address option in the employee's Edit an Employee screen.
---

## Setting Authorized IP Addresses by Employee

The employee's **Authorized IP Address(es)** field assigns the IP address that a particular employee is authorized to punch in/out. To set the authorized IP address(es), perform the following instructions.

1. Go to the **Employee List** and select the employee.
2. In the **Authorized IP Address(es)** field, enter the IP Address(es) of the computer (or other web-enabled device) that the employee is authorized to punch In/Out.
3. You can list the authorized IP address(es) in the following ways.
  - **Any IP Address:** Leave the field blank to allow employees to punch in/out from any IP address.
  - **Multiple IP Addresses:** Put a comma between the authorized IP addresses to allow the employee to punch from any IP address listed.

**Example:** 192.168.3.6, 192.168.3.78

- **Range of IP Addresses:** The employee can punch at computers with an IP address that falls within the 30-45 range.

**Example:** 192.168.3.30-45

4. Check the **Allow Punches from Unauthorized IP** checkbox to allow employees to punch In/out from an unauthorized IP address. Punches from unauthorized IP addresses are flagged with an **X** on the reports.
5. Click **Submit** to save your changes.

## Running Reports with the Web Punch Time Clock

On your reports, web punches are flagged with a **W** after the punch time. If a punch comes from an unauthorized IP address, it is flagged with an **X**.

By clicking on the punch, additional information about that punch displays.

- **Web Punch IP Address:** Lists the IP address of the computer/device the employee punched in/out from.

**Web Punch Browser:** Lists the web browser the employee used while punching in/out.

## Using Proximity Badges


Proximity badges use the latest in RFID proximity technology and allow employees to clock In/Out by simply waving the badge in front of the time clock keypad. There are many benefits to using proximity badges including; minimizing buddy punching, quicker clock In, no PIN to memorize, keeps dirty hands off the clock, and more.

Proximity Badges can be purchased in boxes of 10 or 25 badges. These badges also conveniently fit into your employee's wallet or can be hung on a lanyard. Badges can be easily reassigned to a new employee if needed.

### Assigning Proximity Badges to an Employee

Proximity Badges are assigned at the employee time clock terminal. Follow the instructions below to assign your proximity badge to an employee.

Web Punch IP Address	10.1.10.2
Web Punch Browser	iPhone
GPS Location	Latitude: 45.822625 Longitude: -122.963483 Accuracy: 541 feet (165.0 meters) Altitude: 705 feet (214.8 meters)

1. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter in your security code - the default security code is "00 00 00".
2. Scroll through the options using **Up** or **Down** until you find the option **Assign Badges** and press **Enter**.
3. The time clock display will prompt *Enter ID Number*. Use the keypad to enter the ID number (PIN) of the employee and press **Enter**.

4. Wave the badge in front of the time clock keypad (the 6 key is the optimal location to wave the badge). The clock will display *Assigned* when the badge has been assigned to the employee.

The employee can now use the badge to punch In and Out. Repeat the steps above for each employee.

<b>Note:</b>	To reassign a currently used badge, select the new employee in the Assign Badges menu, enter the PIN of the new employee, and wave the badge. A <i>Badge Already Assigned</i> message will appear. Press <b>Enter</b> to reassign the badge.
--------------	--

## Locking the Time Clock Terminal Keypad

This feature prevents entering a PIN before clocking In or Out.

1. Select **Settings | Preferences**, then click the **Device** tab.
2. Under **Device Preferences**, check the **Lock Keypad** checkbox and click Submit. By checking this box, employees are no longer able to punch In or Out using their PIN number.

## Punching In/Out Using Proximity Badges

Wave the badge next to the keypad of the time clock terminal to punch In or Out. Follow the punch procedure established in [Punching In and Out](#).

# Chapter 9:

## Maintaining Your Time Clock

---

Learn to maintain your time clock for optimal performance

- ✓ Setting up scheduled automatic backups
- ✓ Backing up and restoring data to your time clock
- ✓ Removing punches from your system
- ✓ Resetting the time clock passwords

### Setting up Scheduled Automatic Backups

Backups of your time clock data can be automatically emailed to one or more recipients on a daily, weekly, or monthly basis. It is important to have automatic backups set up to create backups as routinely as possible. Use this backup to restore your data in case of any data loss.

To set up automatic backups, refer to [Email / Backup Preferences](#): on page [23](#).

Once that has been done, go to **Files | Create Backup** and try sending a test backup email by clicking **Submit** under **Email Backup Now**.

If the backup is successfully sent, a notification will display. If you receive an error message make all necessary changes to your SMTP preferences to resolve the errors and try sending the backup again.

**CREATE BACKUP**

Backups are used for restoring your time clock data, in order to view data that has been previously removed or in case of time clock failure.

It is recommended to create a backup of your time clock data weekly and before updating your time clock software.

**Backup Last Sent:** 6/2/15 2:30 am

**Backup Sent To:** email@email.com

**Send Backups:** Daily

[Update Email Backup Settings](#)

Create Backup Now       Email Backup Now

## Creating a Data Backup

It is important to make a backup (copy) of your employee time clock data periodically. Use this backup to restore your data in case of any data loss. We recommend creating a backup of your time clock data each pay period and prior to performing any updates to your time clock.

### Data Backup from the Software Interface

Follow the instructions below to create a backup of your time clock's data:


1. To create a backup file, select **Files | Create Backup**.
2. Click **Submit** to create a backup in the Save to Backup File screen. Click **Save**.
3. A file name is automatically assigned for you. The file name includes the current date for easy reference.

**Example:** A typical file name might be icon-2014-08-15.db.

4. If you prefer a different file name, enter the name in the File name field.
5. Browse to the directory where you would like to save the file.
6. Click **Save**.
7. After the download is complete, click **Close**.

### Data Backup to a USB Flash Drive

Creating a backup of your data can be simplified even further by saving your backup to a USB flash drive. A flash drive is a portable device that you can purchase at any computer store. Follow the directions below to create a backup of your time clock data using a USB flash drive.

1. Plug the USB flash drive into the bottom of the time clock.
2. Enter into Supervisor Mode:
  - Press  on the time clock.
  - Enter your security code - the default security code is "00 00 00".
3. Press **Up** or **Down** until the *DOWNLOAD BACKUP* option displays.
4. Press **ENTER**.

The clock will display *Backing up data* and then *Backup complete*.

**Note:** The backup file saved on the USB flash drive is called backup.db. This file can be renamed and transferred to a folder on your main computer.



## Restore Time Clock Data Backup

On occasion you may need to restore historical data to your time clock. Follow the instructions below to restore a backup of your time clock data.

**Important:** Restoring a backup file will **OVERWRITE** the current data on the clock. Create a **CURRENT** backup of your data before attempting to restore and view "historical" data.


### Restore a Time Clock Data Backup from the Software Interface

1. To restore a backup file, select **Files | Restore Backup**.
2. Type your password in the **Current Password** field.
3. Click **Browse** and navigate to the location of your backup file.
4. Select the file in the Choose File window and click **Open**.
5. Click **Submit** in the Restore Backup File screen to restore the backup file. A warning message will display reminding you that your current data will be overwritten at the employee time clock.
6. Click **OK** to continue. It may take several minutes to restore a backup file. The employee time clock will display a *Please Wait* and then a *Performing Restore* message.
7. After the restore is complete, you will be required to log back into the time clock to view the backup information.

**Note:** The backup is a proprietary file that cannot be used or opened using any other program.

### Restore a Time Clock Data Backup from a USB Flash Drive

Restoring a backup of your data is easy using your USB flash drive. Be sure to save a current backup file before restoring another backup. Follow the directions below to restore a backup from a USB drive.

1. Copy the backup file data to the root of the memory stick.
2. Rename the file to **backup.db** and ensure the name is all in lower case letters.
3. Connect the storage device to the bottom of the employee time clock.
4. Enter Supervisor Mode on the employee time clock.
  - Press  on the time clock.
  - Enter in your security code - the default security code is "00 00 00".

5. Press **Up** or **Down** until *RESTORE BACKUP* displays and press **ENTER**.
6. If the file is found, Restoring Data, then Performing Restore displays. The time clock reboots.
7. After the time clock reboots, log back into the employee time clock software to view your historical data.

## Removing Data from Your Time Clock

Before removing punch data from your clock, be sure to save a backup of your existing data.

1. Go to Files | Delete Old Punches.
2. Select a date using the calendar in the **Delete Punches Prior** to field.
3. Click **Submit** to remove all punches up to the date specified.

**Note:** When selecting a date, any data prior to that date will no longer be available as part of your active database.

4. Click **Cancel** to go back to the time clock Home page.

## Updating Your Time Clock

Occasionally, Icon Time Systems releases new updates for your employee time clock. These updates are provided for free and often include new features and improvements.

**Note:** Before performing updates to your employee time clock, we recommend that you save a backup of your data. Refer to the

### Updating Your Time Clock from the Software Interface

Follow the instructions below to update your Universal Employee Time Clock.

1. Download the time clock update file from our website to your desktop.

<http://www.icontime.com/totalpassupdate>

2. From the Navigation menu, go to **Files | System Update**.

3. In the System Update screen, type your time clock password in the **Current Password** field.
4. Click **Browse** to locate and select the **update.bin** file in the File Upload screen.
5. Click **Open** in the File Upload screen.
6. Click **Submit** in the System Update screen.
7. A “backup your data” pop-up window displays. If you already created a backup of your data, disregard this message by clicking **OK**. Your time clock starts the update process, then automatically reboots. Wait for this process to complete. This process may take up to 15 minutes.
8. When rebooting is complete, click **Home** to log back into your time clock.

### **Updating Your Time Clock Using a USB Flash Drive**

Updating your time clock is even faster if you use a USB flash drive.

1. Download the time clock update file from our website to the root directory on your storage device.

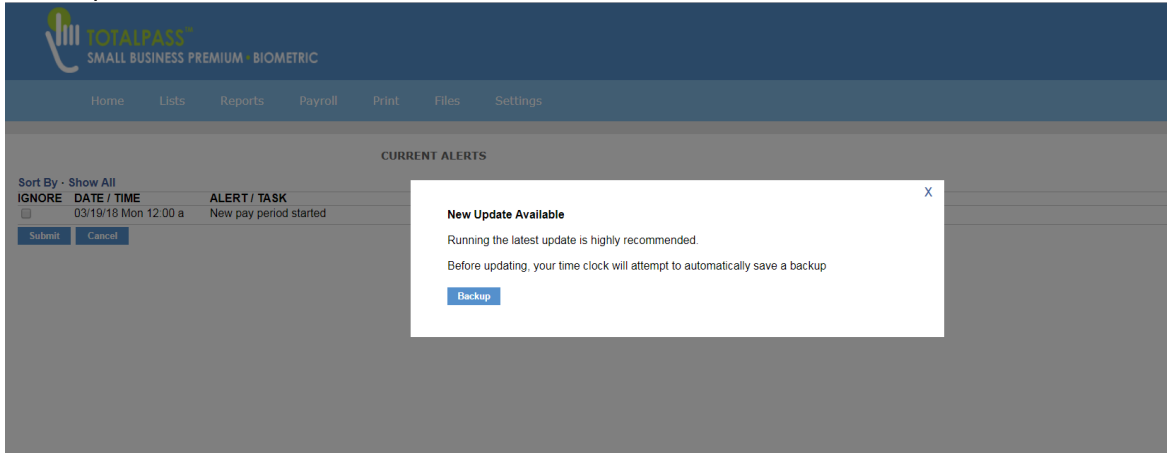
<http://www.icontime.com/totalpassupdate>

2. Connect the storage device to the bottom of the employee time clock. Your time clock begins the update process and automatically reboots. Wait for this process to complete.
3. When the reboot is complete, log back into your time clock.

## Auto-Update

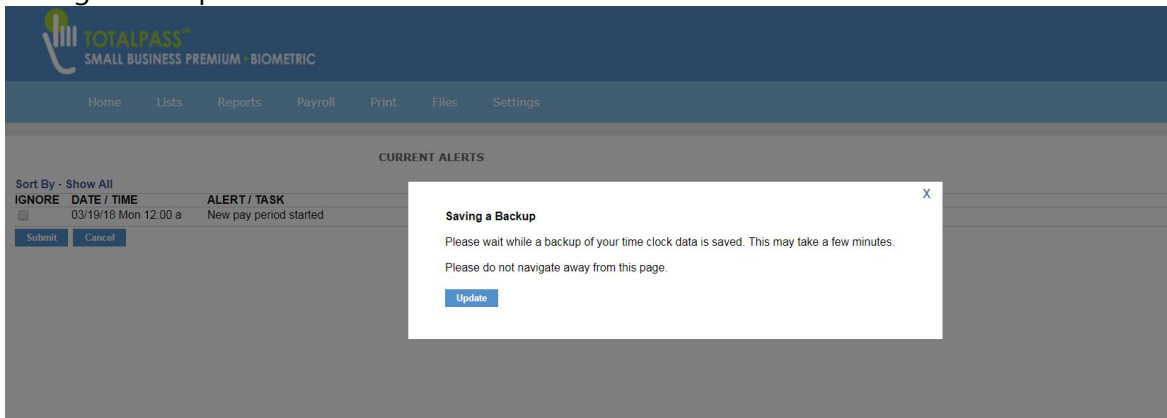
Clock Admins and supervisors with System Update permissions will receive a **New Update Available** notification on the homepage with a recommendation to backup. They will be able to update right from the clock once a local backup file has been created.

### New Update Alert



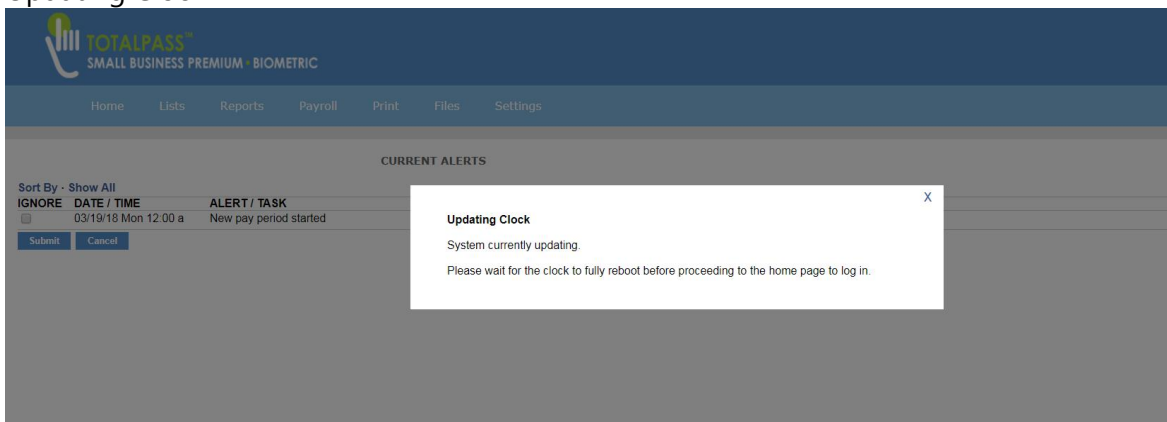
The screenshot shows the TOTALPASS Small Business Premium Biometric interface. A modal dialog box titled "New Update Available" is displayed in the center. The dialog contains the following text: "Running the latest update is highly recommended. Before updating, your time clock will attempt to automatically save a backup." Below the text is a blue button labeled "Backup". In the background, a table of "CURRENT ALERTS" is visible, with one alert: "New pay period started" on "03/19/18 Mon 12:00 a".

### Saving a Backup



The screenshot shows the TOTALPASS Small Business Premium Biometric interface. A modal dialog box titled "Saving a Backup" is displayed in the center. The dialog contains the following text: "Please wait while a backup of your time clock data is saved. This may take a few minutes. Please do not navigate away from this page." Below the text is a blue button labeled "Update". In the background, the "CURRENT ALERTS" table is visible, showing the same alert as in the previous screenshot.

### Updating Clock



The screenshot shows the TOTALPASS Small Business Premium Biometric interface. A modal dialog box titled "Updating Clock" is displayed in the center. The dialog contains the following text: "System currently updating. Please wait for the clock to fully reboot before proceeding to the home page to log in." In the background, the "CURRENT ALERTS" table is visible, showing the same alert as in the previous screenshots.


## Resetting Your Time Clock Passwords


### Changing Your Time Clock Software Interface Password

You can change the password by going to **Settings | Change Password** fr.

1. Enter your current password in the **Current Password** field.
2. Type your new password in the **New Password** field.
3. Type your new password again in the **Confirm New Password** field.
4. Click **Submit**.

### Resetting the Software Interface Password

1. Enter into Supervisor Mode:
  - Press  on the time clock terminal.
  - Enter in your security code - the default security code is **00 00 00**.
2. Scroll through the options using **Up** or **Down** until you find the option **Reset Password** and press **Enter**.
3. Press **In** to reset the password or **Out** to cancel.
4. Once the password is reset you will receive the message *Password Set Successfully* on the time clock display.
5. At the time clock **Login** page enter the default login information, and click **Submit**.
  - Default Username: admin
  - Default Password: admin
6. Change your password.
  - Type the default administrator password.
  - Type your new password.
  - Confirm your new password.



**CHANGE PASSWORD**

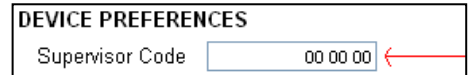
Current Password

New Password

Confirm New Password

## Resetting the Supervisor Mode Security Code

The Supervisor Mode security code is set from the software interface. The default supervisor code is **00 00 00**. It is recommended you change the default code to a new code using the steps below:



The screenshot shows a rectangular box titled "DEVICE PREFERENCES". Inside the box, the text "Supervisor Code" is followed by a text input field containing "00 00 00". A red arrow points to the right side of the input field.

1. Select **Settings | Preferences** from the Navigation menu.
2. Click the **Device** tab.
3. Type the supervisor code in the **Supervisor Code** field. This is required to access Supervisor Mode on the employee time clock terminal.
4. Click **Submit** to save your settings.


# Chapter 10: Time Clock Terminal Supervisor Mode

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## Advanced Supervisor Mode Options

- ✓ Customize Network Settings
- ✓ Reset Software Admin Password

## Log Into Supervisor Mode

1. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock terminal.
  - Enter in your security code - the default security code is "00 00 00".
2. Scroll through the options using **Up** or **Down**.
3. Press **Enter**, when you find the option you would like to view.
4. To exit Supervisor Mode, press **Clear**.

## Parent Clock Supervisor Mode Settings

### View IP Address

Look up the IP address assigned to the clock. Also allows for assigning a static IP address, subnet mask, gateway, and DNS.

## Network Settings

### LAN Settings

#### ***Set IP Address***

Look up the Ethernet IP address assigned to the clock. Also allows for assigning a static IP address, subnet mask, gateway, and DNS.

1. To assign a static IP address, follow the instructions under Assign a Static IP Address to the Time Clock on page [98](#).
  - To erase all network settings and revert back to DHCP so that the router will assign the IP address, set the IP address to **000.000.000.000**.

### Wifi Settings

#### ***Set IP Address***

Look up the Ethernet IP address assigned to the clock. Also allows for assigning a static IP address, subnet mask, gateway, and DNS.

- To assign a static IP address, follow the instructions under [Assign a Static IP Address to the Time Clock](#) on page 98.
- To erase all network settings and revert back to DHCP so that the router will assign the IP address, set the IP address to **000.000.000.000**.

#### ***View Networks***

Allows you to view wireless networks in range, connect to a wireless network, or switch to a different wireless network. Refer to the [Wifi Connection](#) section on page [80](#) for instructions on connecting wirelessly.

#### ***WPS Setup***

Allows you to connect to a wireless network using WPS. Refer to page [81](#) for instructions on using WPS connection.

## Assign Badges

This option is used when assigning a proximity badge to an employee. Refer to [Assigning Proximity Badges to an Employee](#) on page [65](#).

## Set Date/Time

1. From Supervisor Mode, scroll through the options using **Up** or **Down** until you find the option **Set Date/Time** and press **Enter**.



2. The Set Date option displays.
  - The **Month** field flashes. Use **Up** or **Down** to select the current month, and press **Enter**.
  - In the **Day** field, use **Up** or **Down** to select the current day of the month and press **Enter**.
  - In the **Year** field, use **Up** or **Down** to select the current year and press **Enter**.
3. The Set Time option displays.
  - The **Hour** field flashes. Use **Up** or **Down** to select the current hour and press **Enter**.
  - In the **Minute** field, use **Up** or **Down** to select the current minutes and press **Enter**.
  - In the **AM/PM** field, use **Up** or **Down** to select either **A** for a.m. or **P** for p.m. and press **Enter**.
4. Once the new time and date is set, *Date/Time and Set Successfully* displays on the time clock display. You are taken back to Supervisor Mode menu. Press **Clear** to exit Supervisor Mode.

### **View Serial #**

Shows the unique serial number assigned to the individual time clock terminal. The serial number is used to activate your 30-day free support trial, to verify warranty status, and to purchase software upgrades.

### **View Version #**

The version number refers to the software version currently installed on your time clock. Refer to page [70](#) for instructions on [Updating Your Time Clock](#) and ensuring that your time clock is running the latest version.

### **Download Backup**

This option is used to back up your time clock data. Refer to [tly to a USB Flas \h \\\* MERGEFORMAT Data Backup to a USB Flash Drive](#) on page [PAGEREF Creating a Backup Directly to a USB Flas \h 68](#).

### **Restore Backup**

This option is used to restore data into your time clock. Refer to [ectly to a USB Fla \h \\\* MERGEFORMAT Restore a Time Clock Data Backup from a USB Flash Drive](#) on page [69](#).

### **Enable Upgrade**

This option is used to unlock additional upgrade features in your time clock. Refer to [Enabling Software Upgrades](#) on page [85](#)

## Reset Password

If you forget your login password, this option is used to reset your password to default. Refer to [Changing Your Time Clock Software Interface Password](#) on page [73](#).

## Erase All Memory

Erasing all memory resets the clock back to factory default. Follow the instructions below to Erase All Memory.

1. From Supervisor Mode, scroll through the options using **Up** or **Down** until you find the option **Erase All Memory** and press **Enter**.
2. The time clock will display Erase All Memory IN=YES CLEAR=NO.
3. Press **IN** to confirm and erase all the data in the clock and return it to factory defaults.

## Convert to Child

This option is used when setting up a multi-clock system. Refer to

[Chapter 13: Multi-clock Configuration](#) on page [91](#) for more information on multi-clock systems.

## **Download Log**

Download a log file and send to our support team, in instances where we must troubleshoot your system.

## **Additional Child Clock Supervisor Mode Settings**

### **View Parent IP**

Displays the IP address of the Parent Clock.

### **Force Connect**

Forces a connection between the Child Clock and Parent Clock. Once the connection is made, any changes on the Parent Clock are sent to the Child Clock.

### **Force Full Sync**

Forces a connection and synchronization between the Child Clock and Parent Clock. The Child Clock downloads employee and preference data from the Parent Clock and transfers punch data to the Parent Clock.

### **Show Sync Status**

Displays the synchronization status between the Child and Parent Clock.

### **Convert to Parent**

Converts a Child Clock back to a Parent Clock.

# Chapter 11:

# Connect to the

# Clock

---

## Multiple connection options to access your time clock in no time:

- ✓ Easily connect to your wireless network over Wifi.
- ✓ For a faster more reliable connection, connect to your Network with Ethernet.
- ✓ For simply access from one computer, connect using Direct Connect Ethernet or USB.


## Wifi Connection

TotalPass offers a few Wifi connection options, for your convenience:

- Using the Clock Interface
- Using the Software Interface
- Using WPS, for extra fast set up

### Connecting Using the Clock Interface

The first time that you turn your time clock on, if it detects a wireless network in range, it will prompt you to connect your time clock to the wireless network. To return to this option, and connect to a wireless network, follow the instructions below.


1. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter your security code. The default security code is 00 00 00.
2. Use the up or down arrows to scroll until you find *Network Settings*.

3. Press **Enter**.
4. Find WiFi Settings.
5. Press **Enter**.
6. Use the up or down arrows to scroll until you find *View Networks*.
7. Press **Enter**. A list of available wireless networks displays.
8. Use the up or down arrows to scroll until you find the appropriate network, then press **Enter**.
9. When prompted, enter the wireless network password using the up or down arrows to find the first character of the password, then press **Enter**.

Note:	The default mode for the password is alpha lower case. To change the mode, press the <b>Department Transfer</b> icon on the bottom right of the clock's keypad. To erase a character, press <b>Clear</b> .
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10. Repeat step 9 until all characters of the password have been entered. Connect to the Clock
11. Press **Enter**. When connected, a confirmation displays with the IP address.
12. Write down the IP address.
13. Open a Web browsers on your PC. Type in the IP address in the Web browser URL bar, press **Enter**.
14. You should be directed to the time clock Login page.

## Connecting Using a WPS Button


1. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter your security code. The default security code is 00 00 00.
2. Use the up or down arrows to scroll until you find Network Settings.
3. Press **Enter**.
4. Use the up or down arrows to scroll until you find WiFi Settings.
5. Press **Enter**.
6. Use the up or down arrows to scroll until you find WPS Setup.

7. Press **Enter**.
8. Use the up or down arrows to scroll until you find Push.
9. Press **Enter**. Press the **WPS** key on your wireless router within 2 minutes.
10. When connected, a confirmation displays with the IP address.
11. Write down the IP address.
12. Open a Web browsers on your PC. Type in the IP address in the Web browser URL bar, press **Enter**.

You should be directed to the time clock Login page.

## **Connecting Using a WPS with PIN**

### **Enable WPS PIN Connection on the Clock**

1. Find the WPS PIN on the label on your router.
2. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter your security code. The default security code is 00 00 00.
3. Use the up or down arrows to scroll until you find *Network Settings*.
4. Press **Enter**.
5. Find *WiFi Settings*, press **Enter**.
6. Find *WPS Setup*, press **Enter**.
7. Find *PIN*, press **Enter**.

### **Connect to the Wireless Network**

1. Use the up or down arrows to scroll until you find *View Networks*, press **Enter**.
2. Find your Network in the list, using the up or down arrow, press **Enter**.
3. When prompted, enter the WPS PIN number using the keypad, press **Enter**.
4. When connected, a confirmation displays with the IP address.
5. Write down the IP address.

6. Open a Web browsers on your PC. Type in the IP address in the Web browser URL bar, press **Enter**.
7. You should be directed to the time clock Login page.

## Connecting Using the Software Interface

In order to connect your time clock to the wireless network using the software interface, you must first have it connected to your network or computer using the Ethernet or USB cable.


1. Log into your time clock software interface, on either a Parent Clock or Child Clock.
2. Go to **Settings | Network Settings**. The Wifi Network Settings screen displays the available wireless networks.
3. Click the appropriate network.
4. Type the password in the available field, then click **Connect**.
5. The network selected appears at the top of the list, with an indication the time clock is "connected" to the wireless network.

## Ethernet Connection

Connect your time clock directly to your network for a faster and more reliable connection than wireless can offer.

1. Plug one end of the Ethernet cable, provided in the package, to an available port on your router, DSL modem or switch.
2. Connect the other end to the Ethernet port on your time clock.
3. Plug the time clock into the power. Wait for the time clock to fully boot up, it will state Enter ID Number.

**Note:** If there is a wireless network in range, you'll be prompted to connect to the wireless network. Press Clear to cancel and move to step 4.

4. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter your security code. The default security code is 00 00 00.





# Chapter 12:

## Software Upgrades

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### Available upgrades that will allow your system to expand with your business


- ✓ Increase employee and web punch entry capacity
- ✓ Automate tracking and accruing benefit time

Software upgrades can be applied at any time. All software upgrade packs for your TotalPass system can be unlocked immediately by simply entering the software key provided by your reseller.

### Enabling Software Upgrades

In order to purchase a software upgrade, provide your reseller with your time clock serial number. You can find the serial number in the About Your Clock page under the Help menu.

Once you have purchased the software upgrade, your reseller will provide you with the 9 digit software upgrade code. Follow the instructions below to complete the software upgrade installation.

1. Enter into Supervisor Mode at your time clock terminal.
  - Press  on the time clock terminal.
  - Enter in your security code - the default security code is "00 00 00".
2. Scroll through the options using **Up** or **Down** until you find the option *Enable Upgrade* and press **Enter**.
3. Using the keypad, enter in the 9 digit software upgrade code and then press **Enter**.
4. The time clock terminal will display the name of the upgrade.

5. Press **Clear** to exit out of Supervisor Mode. Unplug the time clock from the power, plug it back in to reboot the time clock. Once the time clock is fully rebooted, the new upgrade features are ready to use.
6. If there is a problem, contact our technical support team at 1-800-847-2232.

Once the upgrade has been installed, go the next section for instructions on setting up and customizing your new upgrade features.

## Employee Capacity Upgrades

The TotalPass Small Business Premium Proximity comes standard with a 50 employee limit.

You can easily upgrade the employee capacity to the next available level to 100, 250 or 500 employees per system.

## Web Punch Employee Entry

The Web Punch employee entry allows employees to punch anytime, anywhere using a computer's or smart phone's Web browser on a LAN, WAN, or Internet.

Your time clock comes with 5 Web Punch employee licenses. Web Punch Time Clock upgrades are offered in packages of 5 employee licenses up to a maximum of 50. The Web Punch Time Clock also offers advanced functionality like IP location restrictions and GPS tracking to help better manage your employee's punches. Refer to Chapter 8: Alternate Employee Entry Options for instructions on setting up Web Punch.

## Benefit Tracking Upgrade

The Benefit Tracking upgrade can help increase payroll efficiency and help reduce labor costs with the following features:

### Benefit Tracking and Accruals

- Track and manage Vacation, Sick, and Personal Time benefits.

- Automate maximum accrual amounts, yearly carryover, and borrowing of benefits.

### Enhanced Overtime Preferences

Customize overtime multipliers; allows you to pay time-and-a-half, double time, or other custom defined overtime rates.

### Revision Zones

Round punch (shift) hours to the start and end times of a specific shift. Employees will not get paid for punching In early or Out late.

### Enhanced Overtime Preferences

The additional Overtime options can be found under the **Pay** tab under **Preferences** in the Settings menu.

- **Consecutive Day OT1 On \_\_\_ Days** – determines when Consecutive Day Overtime should begin to accumulate.

#### Example:

If Consecutive Day OT On is set to 6 days, employees will receive Overtime 1 on the sixth consecutive day of work. If the Consecutive Day OT1 After setting is set to 5 hours, the first 5 hour worked on the sixth day is considered straight time and the rest of the hours will be Overtime 1 (OT1).

- **Consecutive Day OT2 After** - refer to the previous example.

If this entry is set to 8 hours, employees will receive Overtime 2 on the sixth consecutive day of work for any hours over 8 hours in the day.

OVERTIME PREFERENCES		
Day OT1 After	<input type="text" value="8.00"/>	Hours
Day OT2 After	<input type="text" value="0.00"/>	Hours
Week OT1 After	<input type="text" value="40.00"/>	Hours
Week OT2 After	<input type="text" value="80.00"/>	Hours
Consecutive Day OT	<input type="text" value="Yes"/>	
Consecutive Day OT On	<input type="text" value="6"/>	Days
Consecutive Day OT1 After	<input type="text" value="5"/>	Hours
Consecutive Day OT2 After	<input type="text" value="8"/>	Hours
OT1 Multiplier	<input type="text" value="1.50"/>	
OT2 Multiplier	<input type="text" value="2.00"/>	

**Note:** Consecutive Day overtime is used in California and is not very common elsewhere.

- **OT1 Multiplier** - enter the pay rate for Overtime 1 (usually 1.5).
- **OT2 Multiplier** - enter the pay rate for Overtime 2 (usually 2).

**Note:** Making a change to the overtime preferences will prompt the time clock to restart. This will make the time clock unavailable until it fully reboots.

### Non-worked Hours and Benefit Time (Vacation, Sick, Personal)

The Benefit Tracking and Accruals feature allows you to track and manage Vacation, Sick, and Personal Time benefits.

## Customizing Benefit Accrual Rules

Benefit Tracking and Accruals allow you to automate maximum accrual amounts, yearly carryover, and borrowing benefits. Benefit balances are available for each day of an employee's employment, letting you deliver real-time balances to managers and employees. Accrual rates and tracking are customized for each employee, which allows for the maximum in flexibility.

To customize an employee's Benefit Accrual Rules, go to the **Edit an Employee** screen by selecting the employee name from the **Employee List**.

ACCRUAL SETTINGS								
Accrual Start Date	01/01/11							
Accrual Reset Date	01/01/12							
Accruals	ACCRUAL NAME	HOURS AVAILABLE	HOURS USED	LAST CALCULATED	YEARLY HOURS	YEARLY MAX	RESET AMOUNT	ALLOW NEGATIVE
	Vacation	0.00	0.00	12/02/11	0.00	0.00	0.00	<input type="checkbox"/>
	Sick	0.00	0.00	12/02/11	0.00	0.00	0.00	<input type="checkbox"/>
	Personal	0.00	0.00	12/02/11	0.00	0.00	0.00	<input type="checkbox"/>

- The **Accrual Start Date** allows you to set the date when the employee is eligible to begin accruing the benefit.
- If your benefits renew/reset each year, enter the date when this happens in the **Accrual Reset Date** field.
- If this is your first time setting up accrues and your employee currently has **Hours Available** or a benefit time balance, enter that balance here.
- Additional hours will be automatically accrued each day according to the value set under **Yearly Hours**. As the employee uses the accrued benefit, the hours are automatically subtracted.
- The total hours that the employee has used since the Accrue Reset date can be found in **Hours Used**.
- The **Last Calculation** displays the date when the benefit accrual balance was last calculated.
- **Yearly Hours** should be set to the total benefit hours the employee accrues in one year.
- The **Yearly Max** is the maximum number of benefit hours allowed to accumulate for the benefit each year. If you allow vacation hours to carry over from one year into the next, post the annual earned amount plus the amount allowed to carry over (the cap). If your company employs a "use it or lose it" policy, you should post the annual amount.

**Note:** This field should not be set to zero unless your benefits do not accrue. Setting this value to zero will reset the Yearly Hours to zero each day.

- The **Reset Amount** is the quantity of hours that an employee is to receive at the beginning of each new accrual year. Most companies would leave this field set to *zero*.
- If your company allows the employee to borrow benefit hours that they have not yet accrued, check the **Allow Negative** box.

### Using Accrued Benefit Hours (Vacation, Sick, Personal)

Follow the instructions below to use accrued benefit hours for the employee.

1. Select **Add Non-Work** from Timecard or other report.
2. Select the employee(s) from the **Select Employees** list.
3. Select the applicable punch from the **Type** drop-down menu.
4. The available punch types are:
  - **NonWorked** – used for applying benefit hours other than the predefined categories below.
  - Holiday
  - Vacation
  - Sick
  - Personal
5. Click in the **Start Date** field and use the calendar to select the non-worked starting date.

The screenshot shows a web form titled "ADD NON-WORK HOURS". On the left, there is a "Select Employees" section with a list box containing "0001-Jeff" and "0124-Jill", and a "Select All" button. Below the list box, it says "1 Employee Selected". To the right of the list box, there are several input fields: "Type" (a dropdown menu set to "Vacation"), "Start Date" (a text box with "01/30/16"), "Number of Days" (a text box with "1"), "Hours Per Day" (a text box with "8"), and "Department" (a dropdown menu set to "Dept 01"). There is also a "Note" text area. At the bottom right, there are "Submit" and "Cancel" buttons.

6. Type the number of consecutive non-worked days to assign for the selected employee(s) in the **Number of Days** field.
7. Type the number of hours to assign to the selected employee(s) each day in the **Hours Per Day** field.
8. Click **Submit**, you will be directed to the Add Non-Work Hours Confirmation page.
9. Review the information on the Add Non-Work Hours Confirmation page for accuracy.
  - Click **Submit** to save your changes.
  - Click **Cancel** to cancel the transaction.
  - Click **Back** to go back to the Add Non-Work page and revise the data.

10. If the employee does not have enough accrued time, an error page will appear.

### **Accrual Summary Report**

To generate the **Accrual Summary Report**, go to the **Reports** icon and select **Accrual Summary** from the drop-down menu.

This report lists the total benefit accrual hours available and the hours used in real time, for each employee.

ACCRUAL SUMMARY		
ADAME,ALE		
Accrual Name	Hours Available	Hours Used
Vacation	20.00	12.00
Sick	8.00	8.00
Personal	8.00	0.00

### **Revision Zones**

After installing the Benefit Tracking upgrade, you can access the Revision Zones by going to **Lists | Departments** and clicking on the individual department to add revision zones to.

1. In the **In Revision Start Time** field, enter a time in **hh:mm:a/p** format. For example, 7:30a.
2. In the **In Revision End Time** field, enter a time in **hh:mm:a/p** format. For example, 8:00a.

**Example:** In the example above, if an employee clocks In between 7:30 a.m. and 8:00 a.m., the shift start time rounds to 8:00 a.m.

3. In the **Out Revision Start Time** field, enter a time in **hh:mm:a/p** format. For example, 4:30p.
4. In the **Out Revision End Time** field, enter a time in **hh:mm:a/p** format. For example, 5:00p.

**Example:** If an employee clocks Out between the Out Revision Start and End Time, the shift end time rounds to the Out Revision Start Time, which is 4:30 p.m.

<b>Note:</b> Making a change to the revision zones will prompt the time clock to restart. This will make the time clock unavailable until the clock fully reboots.
--

# Chapter 13: Multi-clock Configuration

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**Connect up to 32 time clocks together, accessed through one software interface, through your local area network or over the Internet.**

- ✓ Connecting the Child Clock(s) to the Parent Clock
- ✓ Additional multi-clock settings
- ✓ Updating the multi-clock system
- ✓ Clocking In/Out when the Child Clock is unable to connect to the Parent Clock

In a multiple clock system there are two types of clocks:

**Parent Clock:** The Parent Clock hosts the time clock software, settings, and punch data. There is only one Parent Clock in a multi-clock configuration.

**Child Clock:** A Child Clock sends punch information to the Parent Clock, over the Network or Internet, for calculation and storage. There can be a maximum of 31 Child Clocks on a multi-clock system.

## System Requirements

- Each time clock must be connected via Ethernet to the network.
- Each clock must be running the same software version as the Parent Clock.

## Connecting Multiple Time Clocks


### Set Up the Parent Clock

Before setup begins, designate which clock will be the Parent Clock. Follow the instructions in the Quick Start Guide to connect your time clock to your Network.

Write down the serial number of the Parent Clock located on a label on the back of the time clock terminal.

**Note:** It is recommended that the Parent Clock be setup at the location of the person processing the timecards. For instructions on assigning a static IP address, refer to [Assign a Static IP Address to the Time Clock](#).

## Set Up the Child Clock(s)

1. With the Child Clock connected to the Network, enter Supervisor Mode.
  - Press  on the time clock.
  - Enter your security code. The default security code is **00 00 00**.
2. Press **Up** or **Down** until the *Convert to Child* option displays.
3. Press **Enter**. The time clock displays, *This will remove all data, then Erase all Memory*.
4. Press **In** to convert to a Child Clock.
5. Choose the method that your Child Clock will use to connect to the Parent Clock. Follow the instructions accordingly.
6. **Connect via Broadcast:** the Child Clock will connect to the Parent Clock by searching the network for a clock with the Parent Clock's serial number. This is the preferred method if your multi-clock system will be connected on a simple local area network. The Child Clock will remain connected to the Parent Clock, even if the Parent Clock's IP address changes.
7. **Connect via IP Address:** the Child Clock will connect to the Parent Clock by searching the network for a clock with the Parent Clock's assigned IP address. This is the preferred method, if your multi-clock system will be connected over a wide area network or remotely over the Internet.

### Connect Your Child Clock via Broadcast Method

1. The clock displays *Locate Parent By Broadcast?* Press **Enter**.
2. The clock will then display *Finding Clocks Please Wait* as it scans the network for the Parent Clock.
3. Once the Child Clock locates the Parent Clock(s) on the network, the clock displays the serial number of the Parent Clock. Select the serial number of the Parent Clock, and then press **Enter**.
4. If there is more than one Parent Clock on the Network, press **Up** or **Down** to find the correct Parent Clock serial number, then press **Enter**.
5. Skip to the Continuing Multi-clock Setup section.



## Connect Your Child Clock via IP Address

1. Press Down to select *By IP Address*, press **Enter**.
2. Enter the IP address of the Parent Clock, then press **Enter**.

- If connecting over a LAN or WAN, enter the IP address used for accessing the software interface.

CLOCK LIST		
Enabled	Child Clock Name	Serial Number
<input checked="" type="checkbox"/>	B002-055-614	B002-055-614

**Example:** 192.168.004.155

- If connecting remotely over the Internet, enter the public IP address of the Parent Clock's router, including leading zeros.

**Example:** 074.168.004.155

For additional information on connecting your multi-clock system remotely over the Internet, with port-forwarding, refer to [Chapter 14: Configure the Time Clock for Remote Access](#).

## Continuing Multi-clock Setup

1. Once connection is established with the Parent Clock, the Child Clock displays *Child Mode*, then *Enter PIN*.
2. The symbol ' - ' displays in the top right corner.
3. Once the connection is established, the symbol **d** displays in the top right corner of the display. The **d** indicates the Child Clock is connected to the Parent Clock, but the Child Clock is disabled and must be enabled through the software interface.
4. Log into the Parent Clock using the web browser.
5. Go to Lists | Child Clocks.
6. Select the **Enabled** check-box for the Child Clock. Press Submit.
7. The Child Clock displays "#" in the top-right corner of the terminal display indicating the Child Clock is communicating with the Parent Clock.
8. After a few minutes this will change to "+" indicating that the Child Clock is active and ready to use.

## Child Clock Connection Symbols

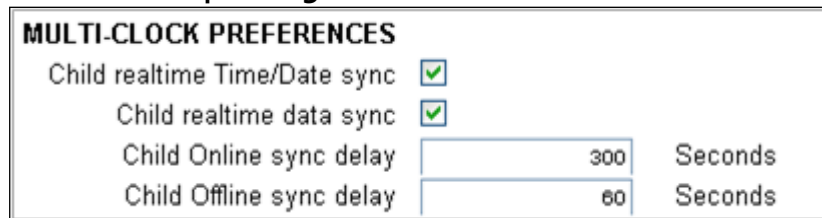
Refer to the chart below for the meaning of the symbols found on the Child Clock display.

—	Child Clock is Unable to establish a Connection to the Parent Clock.
<b>d</b>	Child Clock is Connected to the Parent Clock, but Disabled.
<b>+</b>	Child Clock is Active and Ready to Use
<b>#</b>	Child Clock is Actively Communicating with the Parent Clock
<b>P</b>	Child Clock has Lost Connection to Parent, But is Storing Punches
<b>U</b>	Child Clock is running an older software version than the Parent Clock and must be updated in order to communicate with the Parent Clock.

## Multi-Clock Software Settings and Optimal Configuration

Additional Multi-Clock configuration options are available in your time clock software. It is important to pay close attention to this section. Your time clock configuration can greatly affect the performance of your system.

Select **Preferences | Settings**, then click the **Device** tab.



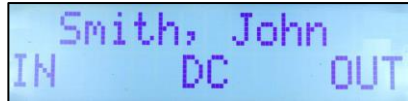
The screenshot shows the 'MULTI-CLOCK PREFERENCES' window. It contains four settings:

- Child realtime Time/Date sync:
- Child realtime data sync:
- Child Online sync delay:  Seconds
- Child Offline sync delay:  Seconds

- **Child realtime Time/Date sync** - Check this option to synchronize the time and date with the Parent Clock. If your Child Clock(s) is located in a different time zone than the Parent Clock, do **not** check this option.
- **Child realtime data sync** – When this option is checked, the Child Clock will actively communicate with the Parent Clock when the employees clock In or Out, in real-time. With this option enabled, the employee is able to view punch and hours information when punching Out.

With this option disabled, the Child Clock will hold its punch data and send it in batches to the Parent Clock. By disabling this option, employees will be prompted to

clock In or Out using non-validated punches. They will need to select whether they are punching In or Out.



If punching In or Out takes longer than preferred, disable this option by unchecking the box. The Child Clock synchronizes data at set intervals, as described below.

- **Child Online sync delay** - This option allows you to set a time interval (in seconds) for how often the Child Clock checks with the Parent Clock for any changes to employee, template, settings or punch data. This option is set to a 300 second (5 minutes) interval as default.
- **Child Offline sync delay** - This option allows you to set a time interval (in seconds) to sync the Child Clock with the Parent Clock in the event that the Child Clock or the Parent Clock loses connection with the network. This option is set to a 60 second interval as default.

### Child Clock Connection Data

You can find additional connection statistics on your multi-clock system at **Help | About Your Clock**.

- **Child Clocks** provide a list of all Child Clocks that have been connected to your Parent Clock, when the Child Clock last successfully communicated with the Parent Clock, and if the Child Clock is enabled or disabled.

CHILD CLOCKS	
Name:	B003-401-518
Serial Number:	B003-401-518
Last Connected:	06/17/15 1:46pm
Enabled:	Yes

## Updating the Multi-Clock System

To update your Multi-clock System, follow the instructions in Chapter 9 to update the Parent Clock. Once the Parent Clock is updated, the Child Clock(s) will automatically download the update file and update. It may take a few minutes for the Child Clock to detect that the Parent Clock has updated.

If the Child Clock detects that it is running an older version of the software than the Parent Clock, but is unable to update automatically, it will display a **U** in the top-left of the display. If

this occurs, follow the instructions on  
[\\\* MERGEFORMAT Updating Your Time Clock Using a USB Flash Drive](#) on page  
[PAGEREF Updating Your Time Clock Using a USB Fla \h 71](#).

# Chapter 14:

# Configure the Time Clock for Remote Access

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## Connect to your time clock away from the office

- ✓ Work from home
- ✓ Multiple locations
- ✓ Employee remote punch

Follow the instructions below to set your time clock up with remote access, using Port Forwarding.

## System Requirements

- A Broadband Internet connection (Cable, DSL, T1, etc.) at the location of the clock.
- TotalPass connected to your network by an Ethernet (i.e. CAT5) cable.
- A router with "Port Forwarding" functionality.
- Static public/external IP address, although not required, is *highly* recommended. Contact your Internet Service Provider for a static public/external IP address.

If your business performs PCI Security Scanning for credit card processing, setup can be complicated and may be incompatible. Some customers choose to set up a separate network for their credit card processing system.

**Important:** For a nominal fee, Icon Time Systems offers an optional service to assist in setting up port forwarding/remote connection to your time clocks.

## Step 1: Set Up the TotalPass on the Local Network

Follow the instructions on the TotalPass Quick Start Guide to set up your time clock on the Local Network. Once you are able to access the TotalPass software Home page from a PC inside your internal/local network, you are ready to configure the system for remote access.

## Step 2: Router Configuration


You will now configure your router for port-forwarding. Port forwarding allows computers and other network devices to connect to a specific computer or service within a private local area network (LAN), through the Internet.

These instructions include general guidelines for configuring a router for Port Forwarding. Actual steps required may vary with each router. For specific instructions on your particular router, please contact the router's manufacturer.

**Important:** For instructions on configuring your specific router, go to the website [www.portforward.com](http://www.portforward.com) and select your router brand and model.

### Assign a Static IP Address to the Time Clock

In order for Port Forwarding to work correctly, assign a static IP address to the time clock along with the subnet mask, gateway address and DNS address. Your Network Administrator should be able to provide you with this information.

1. Determine an available IP address to be assigned to the time clock.
2. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter in your security code - the default security code is **00 00 00**.
3. Scroll through the options until you find the option View IP Address - press **Enter**.
4. The current IP address of the clock will appear. Press **Enter** again.
5. Enter the desired IP address including leading zeros. Press **Enter**.

**Example:** 192.168.004.155

6. Enter the Subnet Mask - press **Enter**.

**Example:** 255.255.255.000

7. Enter the Gateway address - press **Enter**.

**Example:** 192.168.004.001

**Note:** If you are unsure of the gateway address, it is typically the same IP address as your router.

8. Enter the DNS address of your network - press **Enter**.

**Example:** 192.168.004.001

9. Press **Clear** to exit out of Supervisor Mode.

Open a Web browser on a computer in the same local network. In the address bar, type in the IP address of the clock to verify that you can log into the time clock.

## Set Up Port Forwarding on the Router

These instructions are general guidelines for configuring a router for port-forwarding. Actual steps required may vary with each router. For instructions on configuring your specific router, go to the website [www.portforward.com](http://www.portforward.com) and select your router brand and model, or contact your router's manufacturer.

If you are using both a router and a cable modem router/DSL modem router, port forwarding must be configured on both the router and cable modem router/DSL modem router. Alternatively you may contact your ISP to disable the router function on your cable modem router/DSL modem router so that you only need to setup port forwarding on your main network router.

1. Open a web browser like Internet Explorer or Firefox. Enter the internal/local IP address of your router in the address bar.

**Examples:** 192.168.1.1 and 192.168.0.1

**Note:** If you do not know your routers internal/local IP address, refer to [How To Find Your Routers IP Address](http://portforward.com/networking/routers_ip_address.htm) guide ([http://portforward.com/networking/routers\\_ip\\_address.htm](http://portforward.com/networking/routers_ip_address.htm)).

2. Enter the router's username and password. Below are some default router logins
  - Linksys Router – "admin" for both username and password
  - Netgear Router – "admin" for username and "password" for password
  - D-Link Router – "admin" for username and (leave blank) for the password
  - 3Com Router – "admin" for both username and password
  - Microsoft Broadband – "admin" for both username and password
3. Look for a tab with a name like, "Port Forwarding" or "Applications and Gaming". Each router is different, if you are unable to find these settings, refer to your router's instruction guide.
4. Next, enter port **80** as the desired port. If port 80 is unavailable, you may enter port **9844** as an alternative.
  - If your router asks you whether to open ports for TCP or UDP select **TCP** or **both**.
  - Some routers offer port range option, such as; from port \_\_\_ to port \_\_\_. Enter the same number into both fields.

Ext.Port		Protocol TCP	Protocol UDP	IP Address	Enable
80	To 80	<input checked="" type="checkbox"/>	<input type="checkbox"/>	192.168.1.100	<input checked="" type="checkbox"/>

5. Next, enter the static IP address assigned to the clock.
6. If there is a checkbox to "enable" the port forwarding rule, be sure to check the box.
7. Make sure you click on the **Save Settings** button, or your changes will not take effect.

**Note:** You may need to reboot the router for changes to take effect.

### Step 3: Connect to Your TotalPass over the Internet

After your router is properly configured on port 80 or port 9844, follow the steps below to connect to the clock through the Internet.

1. Look up your external/public IP address in one of the following ways; (skip to step 2 if you already know the external/public IP address provided by your ISP)



- On a computer on the same network as your clock, go to [www.ipchicken.com](http://www.ipchicken.com). Your external/public IP address will be displayed on the page.
  - Use the Port Forwarding Tester link below to verify if port 80 or port 9844 is open. If the port is not open, there is a setup issue on the clock or your router, remote access will not be available: <http://www.yougetsignal.com/tools/open-ports/>
2. From the remote location, type the external/public IP address into a browser's address bar.
  3. If you opened port 80, simply enter the external/public IP address into the address bar.
 

**Example:** http:// 68.213.205.154
  4. If you are forwarding to port 9844, log onto the time clock using your external/public IP address followed by **:9844**.

**Example:** http://68.213.205.154:9844

## Remote Connection Frequently Asked Questions

- Q.** I have multiple locations, not connected over a Network (LAN). How do I connect a Child Clock to the Parent Clock at my main office?
- A.** To connect the Child Clock to the Parent Clock remotely over the Internet, you must forward an additional port, **Port 10923**.
- R.** What port do I forward if SSL Data Encryption is enabled?
- A.** To access the time clock application remotely, while using the SSL data encryption option, forward to **Port 443**. Do not use Port 80.
- Q.** My Internet Service Provider will not provide me with a Static external/public IP address. Are there other options?
- A.** If you are unable to get a static external/public IP address from your ISP, you have two options:
- Use the dynamic external/public IP address. If this IP address changes, you will need to use the new address in a remote web browser.
  - Use a 3<sup>rd</sup> party dynamic DNS service provider.

Dynamic DNS allows you to use the same assigned name as a web link in your web browser without concern about the actual public IP address of the router.

List of Dynamic DNS Service Providers:

- dyn.com
- no-ip.com
- dnsdynamic.org
- changeIP.com

## Troubleshooting Remote Connection Problems

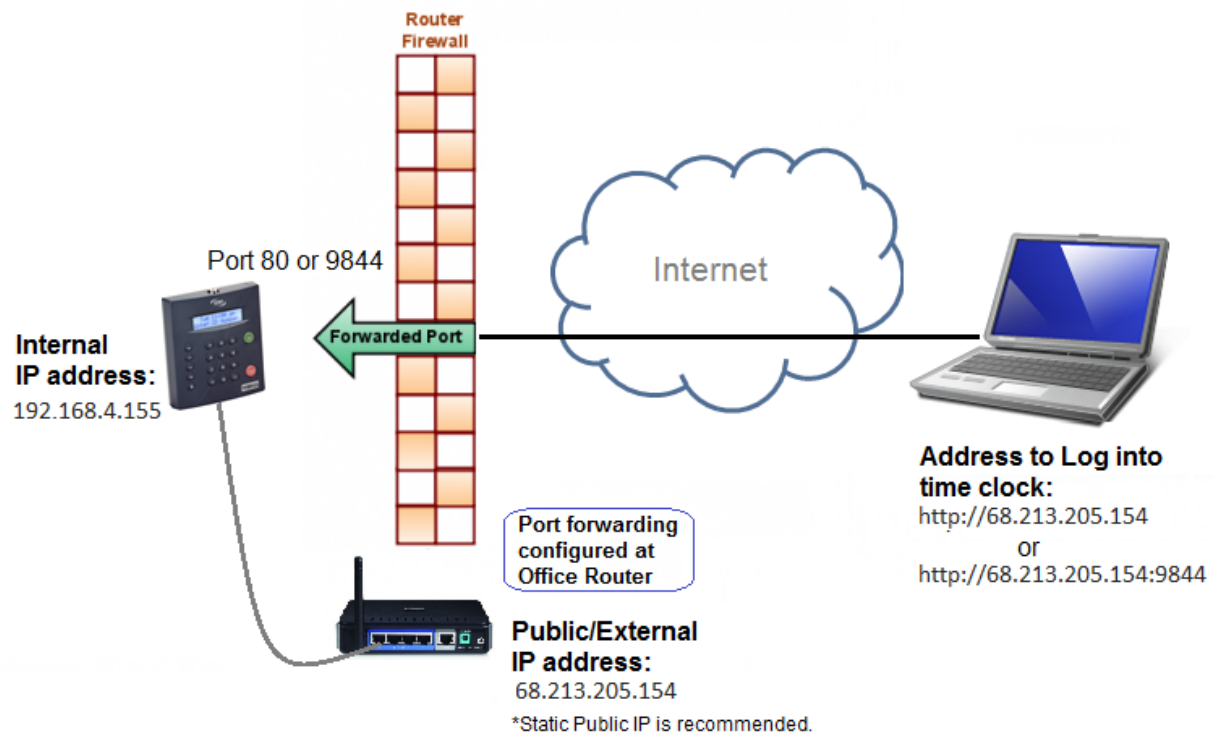
If you are unable to connect to your time clock using the external/public IP address you will need to troubleshoot your connection and configuration.

- Restart your router.
- If you are using both a router and a cable modem router/DSL modem, ensure that port forwarding has been configured on both the router and cable modem router/DSL modem router.
- The cable modem router/DSL modem router must port forward to the local static IP address assigned to the secondary router.
- Alternatively you may contact your ISP to disable the router function on your cable modem router/DSL modem router.
- Ensure that a static internal IP address has been assigned to the clock along with the proper subnet mask, DNS address, and gateway address. Reboot the time clock to ensure any IP address changes take effect.
- Make sure port forwarding has been setup correctly in the router.
- Make sure that the correct external/public IP address is entered in the web browser.
- Make sure another device on the network is not using the same IP address as the time clock.
- Check the filter settings on the router to be sure that it is not interfering with the connection.

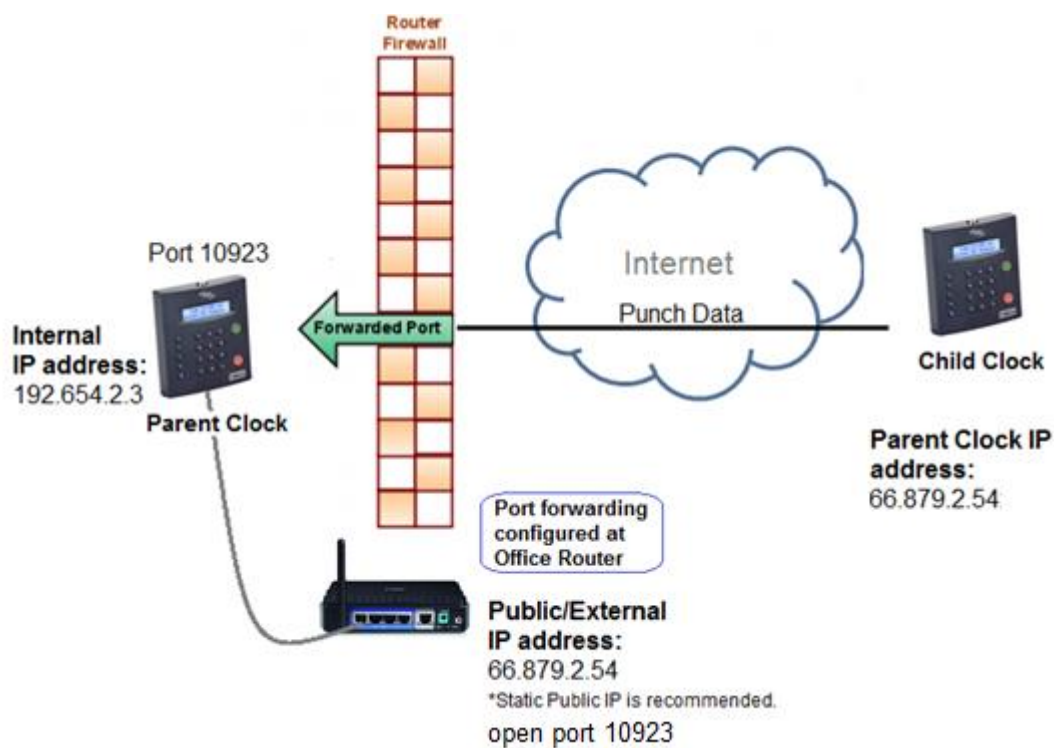
- Use an open port checker, like [www.yougetsignal.com](http://www.yougetsignal.com) to check your external IP address and detect the correct open ports on your network.

For additional troubleshooting steps refer to [www.portforward.com](http://www.portforward.com). Select your router by model name and number for specific port forwarding instructions.

## Standard Remote Connection Setup Diagram



## Connect Clocks Remotely with Multi-clock Diagram



# Warranty

# Information

ICON TIME SYSTEMS, INC., an Oregon Corporation

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## **ONE-YEAR LIMITED WARRANTY**

ICON TIME SYSTEMS, INC. offers the original purchaser a warranty for **One (1) Year on Parts and Labor**.

ICON TIME SYSTEMS will repair and exchange parts for your unit free of charge in the USA in the event of a defect in materials or workmanship, as follows:

### **PARTS**

New or comparable rebuilt parts in exchange for defective parts for one (1) year beginning on the date of delivery.

### **LABOR**

Mail-in service for One (1) year beginning on the date of delivery.

### **SERVICE**

If adjustments or repair are required, purchaser must contact our customer service department within the warranty period detailing the request. The purchaser must provide model, serial number, and a copy of original purchase. If ICON TIME SYSTEMS decides a product requires service, ICON TIME SYSTEMS will issue a Return Material Authorization Number (RMA). Products may be shipped to ICON TIME SYSTEMS adequately insured, in their original packaging or equivalent, with shipping charges prepaid. Risk of loss or damage during shipping to ICON TIME SYSTEMS is the sender's responsibility. Once we receive the equipment, it will be inspected, repaired as needed, tested, and returned via standard ground shipping to the purchaser. Return shipping costs of the repaired or replaced unit will be paid by ICON TIME SYSTEMS.

This warranty is extended only to the original purchaser. A purchase receipt or other proof of date of original purchase will be required before warranty work is rendered.

This warranty only covers failures due to defects in materials or workmanship that occur during normal use. It does not cover failures due to damage which occurs in shipment, or failures which are caused by products not supplied by ICON TIME SYSTEMS, or failures which result from accident, misuse, abuse,

neglect, mishandling, misapplication, alteration, faulty installation, modification or service by anyone other than a factory service center, or damage that is attributable to acts of God.

No warranty is given for damages caused by external wiring indicating improper connection to power supply or line wiring, or for damages caused by spikes, power surges, brown outs, lightning, static electricity, or radio waves. Surge protectors are readily available to enhance and protect equipment performance following initial installation.

ICON TIME SYSTEMS SHALL NOT BE LIABLE FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES RESULTING FROM THE USE OF THIS PRODUCT, OR ARISING OUT OF ANY BREACH OF THIS WARRANTY. DURATION OF IMPLIED WARRANTIES, IF ANY, IS LIMITED TO ONE (1) YEAR. Some states do not allow the exclusion of limitation of incidental or consequential damages, or limitations on how long an implied warranty lasts, so the above exclusions or limitations may not apply to you.

This warranty gives you specific legal rights and you may also have other rights that vary from state to state. If a problem with your ICON TIME SYSTEMS unit develops during the warranty period, contact ICON TIME SYSTEMS SERVICE DIVISION, at the address below. There are no other express warranties except as listed above.

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# FCC Part 15

This equipment has been tested and found to comply with the requirements for a Class B digital device under Part 15 of the Federal Communications Commission (FCC) rules.

These requirements are intended to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation.

If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced technician for help.

Changes or modifications to this equipment not expressly approved by the party responsible for compliance could void the user's authority to operate the equipment.

To ensure safety of users, the FCC has established criteria for the amount of radio frequency energy that can be safely absorbed by a user or bystander according to the intended usage of the product. This product has been tested for compliance with the FCC criteria.