



Quick Reference Guide



Central Time Clock
Since 1931

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Table of Contents

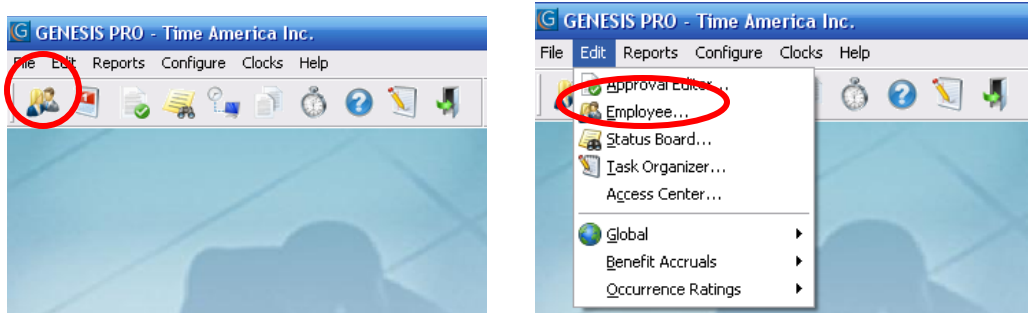
Adding New Employees	4
Adding Transactions Using the Online Timecard	17
Adding Transactions Using Transaction Maintenance	22
Editing Existing Transactions in the Online Time Card	27
Fixing Missing Punches in the Employee's Time Card.....	32
Using the Approval Editor.....	38
Adding an Employee to the Time Clock for Profile Lockouts.....	43
Manually Polling the Time Clocks	48

ADDING NEW EMPLOYEES

Adding New Employees

As a company grows, hiring more employees is an expected experience. Genesis Pro makes adding new employees simple by walking the system user through the screens necessary to fully configure the new employee's assignments and options. Depending on the options selected in the Main Company setup, you might not see all the options and/or screens.

1. To add an employee, click on the **Employee** icon, or select **Edit**, then **Employee**. This will open the *Configure Employee* Screen.



2. In the *Configure Employee* screen, press the **Detail** tab to change to the Employees Details.

3. Click the **Add** button at the bottom of the window to add a new employee.

The screenshot shows the 'Configure Employee' window. On the left, there is a list of employees with columns for 'Number' and 'Name'. The main area contains a form for employee '00001 Washington, Carol'. The form includes fields for Number (00001), SSN, Birth date (01/01/1900), Last name (Washington), First name (Carol), Address, City, Zip Code, State, Phone, Email address, Hire date (05/19/2008), Fiscal date (05/19/2008), and various assignment options like Division (0000 TIME AMERICA, INC.), Group (NO GROUP ASSIGNED), Holiday group (ALL HOLIDAYS), Accrual rule (NO ACCRUAL RULE DEFINED), Occurrence (NO OCCURRENCE RULE DEFINED), and Web timezone (NO TIMEZONE DEFINED). There are also checkboxes for 'Use PC Clock', 'Use Web Clock', 'View Benefits', 'View Schedule', 'View Timecard', 'View Status Board', and 'Submit Time Sheet'. A 'Picture' field with a 'Browse' button is also present. At the bottom, there are buttons for 'Add', 'Edit', 'Delete', 'Print', and 'Close'. The 'Add' button is circled in red.

4. All the fields will be blank, with the Hire date and the Fiscal date set to the Current system date.
5. Enter a unique employee number and the employee's personal information. Make sure to check the **Hire** and **Fiscal** dates. Assign the employee to a Division, Group and Holiday Group (if in use). If the *Benefit Accrual Module* is installed, assign the employee to an Accrual Rule. If the *Occurrence Module* is installed, assign the employee an Occurrence Rule. If the *Web Clock Module* is installed, assign the employee a time zone and define other Web Clock options. If the *PC Clock* is installed, check the box to assign the employee. All information can be added or changed at a later date with the exception of the Employee Number.

Configure Employee

00001 Washington, Carol

Division: ALL Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John

Number: SSN: Birth date: / /

Last name: First name: Mi: ☐

Address: Address: City: Zip Code: State: Phone: () -

Email address: Hire date: 11/18/2009 ☐ Accrue this month Fiscal: 11/18/2009

☐ Use an Alternate Hire date for Benefits 01/01/1900

Division: 0000 TIME AMERICA, INC. Group: NO GROUP ASSIGNED

Holiday group: ALL HOLIDAYS Accrual rule: NO ACCRUAL RULE DEFINED

Occurrence: NO OCCURRENCE RULE DEFINED Web timezone: NO TIMEZONE DEFINED

☐ Use PC Clock ☐ Remote/Web Access ☐ Use Web Clock

☐ View Benefits ☐ View Schedule ☐ View Timecard ☐ View Status Board ☐ Submit Time Sheet

Picture:

5 Listed ☒ Number ☐ Name ☐ Show Inactives

- You can also input a picture into the employee's record by selecting the Browse button and picking the picture file to use. A bitmap file (.BMP) must be located in the Images directory under the Genesis Pro main folder on the computer to add a picture. Add any Comments then click **OK**. This will open the Status screen.

Status for Employee 99999 Test, Sam

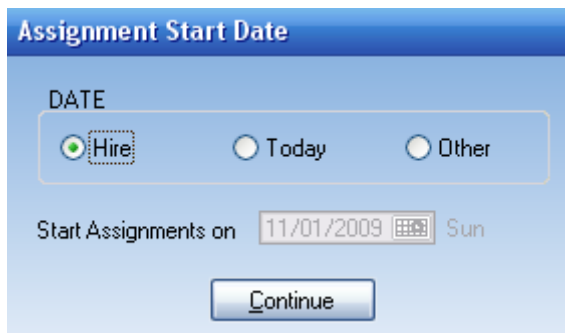
Date	Policies	Active	Fulltime	Permanent
11/01/2009	001	YES	YES	YES

- The Status will auto populate with the Hire Date as the Status Date, the First Policy, Active Status, Fulltime Status, and Permanent Status.
- If you need to change anything but the Status date and Active Status, click on **Edit**. This will open the *Status Maintenance* screen. If no changes are needed, click **Close**.



The **Status Maintenance** dialog box has a blue header. Below the header is a date field labeled "Date" with the value "11/01/2009" and a calendar icon, followed by the day of the week "Sun". Below this is a section labeled "Status" containing six radio button options: "Active", "Inactive", "Full Time", "Part Time", "Permanent", and "Temporary". The "Full Time" and "Permanent" options are selected. Below the status section is a section labeled "Policies" with a dropdown menu showing "001 STANDARD" and a small downward arrow. At the bottom are two buttons: "OK" and "Cancel".

- Change any setting that is incorrect and click **OK**. This will take you back to the Status screen. Click **Close** to accept. This will open the Assignment Start Date.



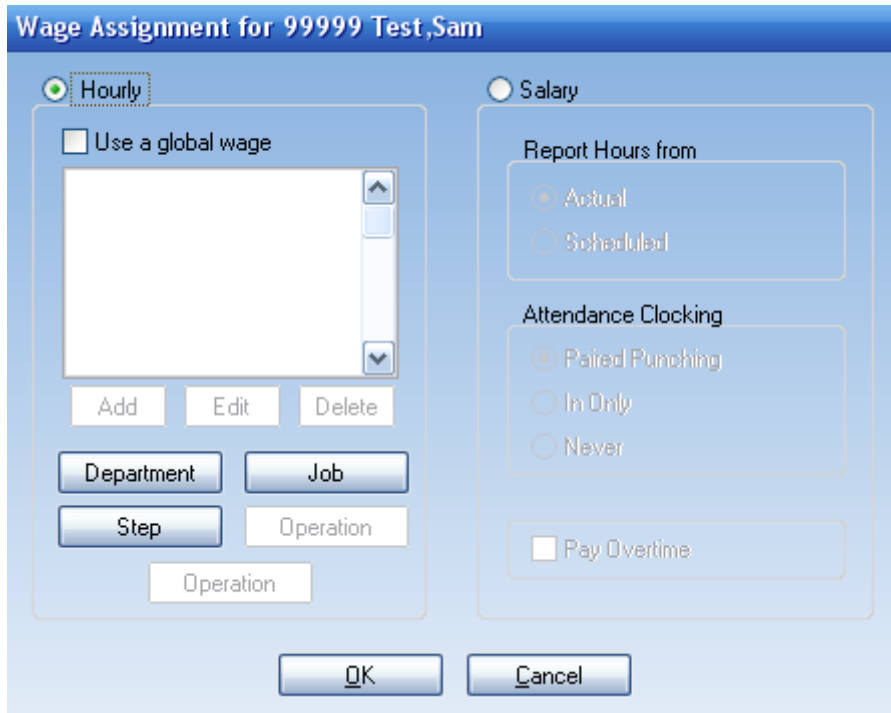
The **Assignment Start Date** dialog box has a blue header. Below the header is a section labeled "DATE" with three radio button options: "Hire", "Today", and "Other". The "Hire" option is selected. Below this is a date field labeled "Start Assignments on" with the value "11/01/2009" and a calendar icon, followed by the day of the week "Sun". At the bottom is a button labeled "Continue".

- Select the date that the employee schedule should start on. Use the **Other** option to manually select the Assignment Start Date. Click **Continue**. This will open the Schedule screen.

11. Starting on Sunday, change the **Shift** and assign the employee to a Department, Job, Step, Operation and Task (if in use) by clicking in the appropriate field. If the employee has the same schedule each day, select the **>>** (update the rest of the week option) or continue to change the days until they reflect the employee's schedule.
12. You can enter a specific **Shift Override** start and stop schedule change time for rounding rule purposes only. You may also use the graphic timeline to define the same.
13. Check the **Work** box for each day the employee is scheduled to work. Click **OK** to accept.
14. The next screen is the *Message Assignments* screen. This screen configures the employee message sent to the time clock. Click the **Add** button to configure a message for each clock. The **All Clocks** button will send a single message to all clocks.

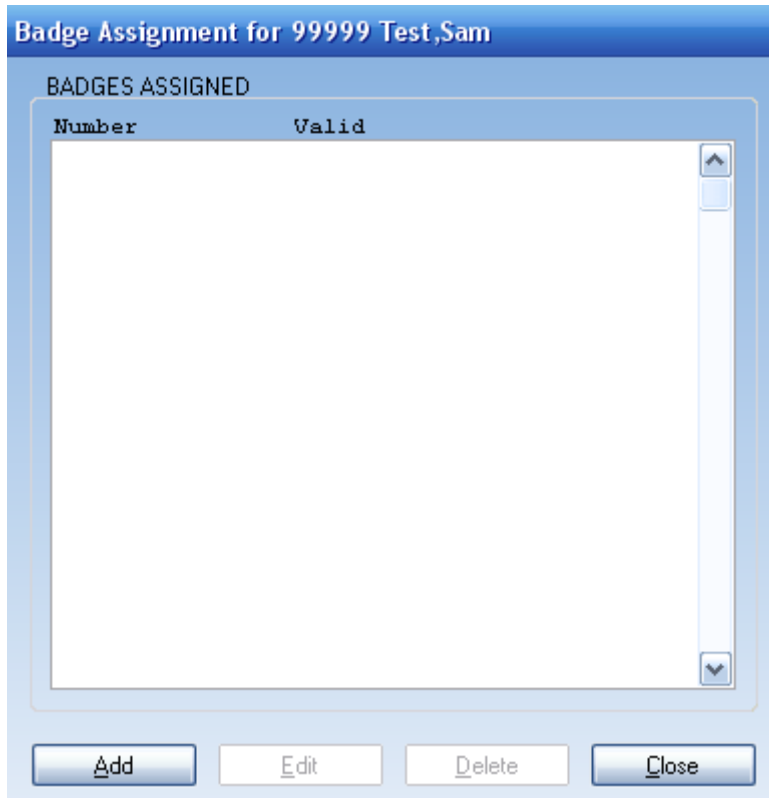
15. If the **Add** button is pressed, the Message Assignment screen will display. If the **All Clocks** button is pressed, only the *Message* area is visible.

16. Enter the Message or use the **Default message to Employee Name** option. Click **OK** to return to the *Message Assignments* screen. Click **Close** to continue. If *Wages* is selected in the *Main Company Setup*, you will see the *Wage Assignment* screen.
17. The *Wage Assignment* screen configures the employee for exempt or non-exempt status. Select the option that fits the employee wage rule. If the employee is non exempt select the wage by department, step, job, operation, or task (if in use). Otherwise, select the **Use a global wage** option.



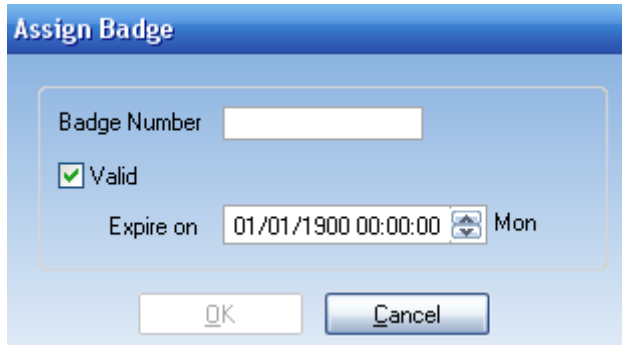
The "Wage Assignment for 99999 Test,Sam" dialog box is divided into two main sections: "Hourly" and "Salary". The "Hourly" section is selected with a radio button. It contains a checkbox for "Use a global wage" which is unchecked. Below this is a large empty list box with up and down arrows. Underneath the list box are three buttons: "Add", "Edit", and "Delete". Below these are four buttons: "Department", "Job", "Step", and "Operation". At the bottom of the "Hourly" section is another "Operation" button. The "Salary" section is unselected. It contains a "Report Hours from" section with two radio buttons: "Actual" (selected) and "Scheduled". Below this is an "Attendance Clocking" section with three radio buttons: "Paired Punching" (selected), "In Only", and "Never". At the bottom of the "Salary" section is a checkbox for "Pay Overtime" which is unchecked. At the very bottom of the dialog box are two buttons: "OK" and "Cancel".

18. If the employee is hourly, select the options that fit their wage rule. After configuring the employee's wage, click **OK**. This will take you to the *Badge Assignment* screen.



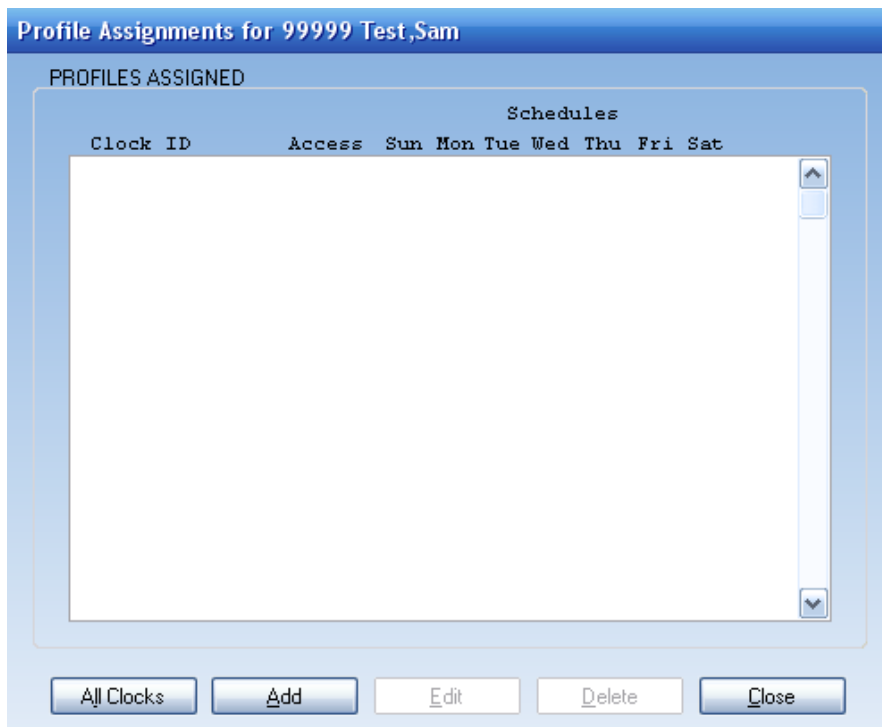
The "Badge Assignment for 99999 Test,Sam" dialog box features a title bar and a section titled "BADGES ASSIGNED". Below this title is a large list box with two columns: "Number" and "Valid". The list box is currently empty and has up and down arrows on its right side. At the bottom of the dialog box are four buttons: "Add", "Edit", "Delete", and "Close".

19. The *Badge Assignment* screen selects the badge number(s) for the employee. Click the **Add** button to open the *Assign Badge* screen. Enter the Badge number, check the **Valid** box and define the expiration date of the badge number, then click **OK**. If the employee has more than one badge, repeat this step.



The **Assign Badge** dialog box has a blue header bar with the title "Assign Badge". Inside, there is a "Badge Number" text box, a checked "Valid" checkbox, and an "Expire on" date/time picker set to "01/01/1900 00:00:00" with a calendar icon and the word "Mon" next to it. At the bottom are "OK" and "Cancel" buttons.

20. Depending on the options selected in the *Main Company Setup* screen, the Badge number might be assigned by the system automatically. If the employee uses a different badge, click the **Delete** button to remove the badge, then add the correct badge.
21. After the badges are entered click **Close** go to the *Profile Assignments* screen.
22. If the Profiles Module is installed you can assign the employee to a profile schedule.



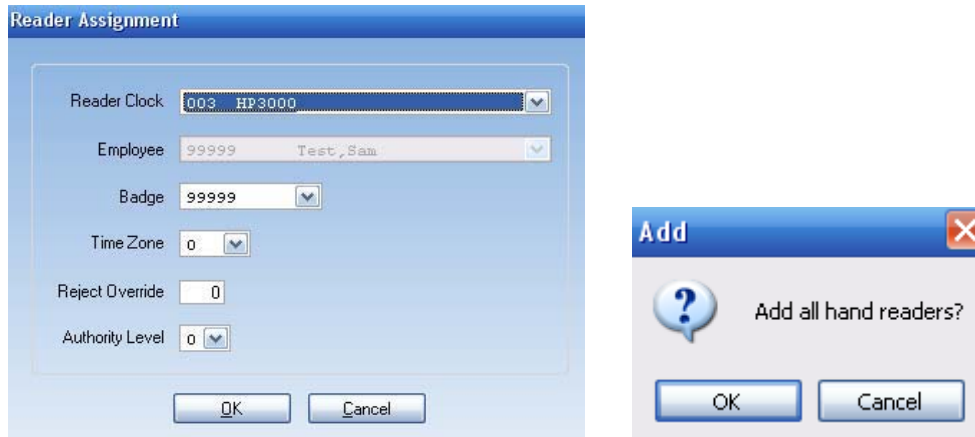
The **Profile Assignments for 99999 Test, Sam** screen has a blue header bar with the title "Profile Assignments for 99999 Test, Sam". Below the header is a section titled "PROFILES ASSIGNED" containing a table with the following columns: "Clock ID", "Access", and "Schedules". The "Schedules" column is further divided into days of the week: "Sun", "Mon", "Tue", "Wed", "Thu", "Fri", and "Sat". The table body is currently empty. At the bottom of the screen are five buttons: "All Clocks", "Add", "Edit", "Delete", and "Close".

23. This screen configures the employees' restrictions on their use of the Time Clock. Click the **Add** button to configure a profile schedule for each clock. The **All Clocks** button will send a single schedule to all clocks. If the **Add** button is pressed, the

Profile Assignment Detail screen will display. If the **All Clocks** button is pressed, only the *Valid Access* and *Schedule* area is visible.

24. Profiles must be assigned to the clocks before you can assign them to the employees. The Profile in use will show the name of the profile assigned to the clock. Select the Valid Access option. Assign the correct schedules for each day. Then click **OK** to finish. The clock must be programmed after changing any *Profile Assignments*.
25. Continue adding profiles to each clock then click **Close** go to the *Clock Assignments* screen.

26. The *Clock Assignments* tab is used to assign Hand Readers, PDAs, TA7000 clocks and TA780/TA785 clocks to employees. This is necessary because the Hand Reader clocks take measurements of an employee's hand and the TA7000 and TA780/TA785 clocks can be used as fingerprint clocks. Each time the employee punches, the clocks compare the employee's hand and/or fingerprint to the existing template. Employee information, hand templates and fingerprints are stored in the clocks. For this reason, employees must be assigned to a clock so their name and template will be downloaded to the correct clock.
27. If the **Add** button is selected, the Reader Assignment screen will display. If the **All Clocks** button is selected, only the *Add* area is visible.



28. Continue to add the necessary clocks to the employee then click **Close** in the *Clock Assignments* screen to finish.
29. You have successfully configured a new employee into Genesis Pro.
30. You may now click the *Benefit* tab if any updates to benefits are necessary. This screen configures the amount of benefit hours the employee receives. Select a benefit and click the **Details** button.

The screenshot shows the 'Configure Employee' window with the 'Benefits' tab selected. The employee is 99999 Test, Sam. The Fiscal Date is 11/01/2009 and the Benefit Hire Date is 11/01/2009. The window displays a list of benefits with columns: Code, Description, Allowed, Taken, Pending, Left, Count, and Carry date. Two benefits are listed: PERS (PERSONAL DAY) and VAC (VACATION). Both have an Allowed amount of 4.00 and a Carry date of 11/01/2009. The window also includes a list of employees on the left and buttons for Update, Details, Print, and Close at the bottom.

Code	Description	Allowed	Taken	Pending	Left	Count	Carry date
PERS	PERSONAL DAY	4.00	0.00	0.00	4.00	0	11/01/2009
VAC	VACATION	0.00	0.00	0.00	0.00	0	11/01/2009

31. This will open the *Benefit Details* screen. Enter the amount of hours for the benefit in the Amount Allowed field. Click **OK** to finish after the benefit is configured. This will take you back to the *Benefit Entitlements* screen. Continue to configure each benefit until finished. Click **Close** to accept.

The screenshot shows the 'Benefit Details for 99999 Test, Sam (PERS)' window. It displays a table with columns: Day, Date, Time, Amount, Balance, Category, Type, and Archived. Two entries are shown for the PERS category, both with an Amount of 2.000000 and a Balance of 4.000000. The window also includes a checkbox for 'Show Accrued Adjustments' and buttons for Delete, Manual Adj., Close, and Print at the bottom.

Day	Date	Time	Amount	Balance	Category	Type	Archived
Sun	11/15/2009	00:00:01	2.000000	4.000000	PERS	Given Hours	NO
Sun	11/08/2009	00:00:01	2.000000	2.000000	PERS	Given Hours	NO

32. You have successfully configured a new employee completely into Genesis Pro.

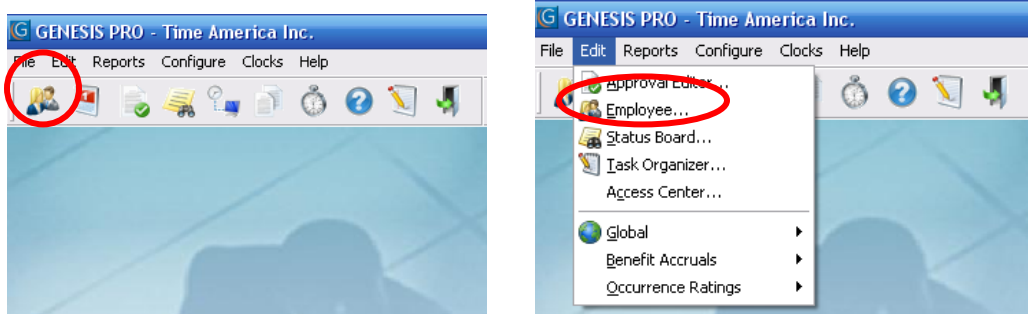
NOTES

ADDING TRANSACTIONS USING THE ONLINE TIMECARD

Adding Transactions Using the Online Timecard

Genesis Pro uses Transactions to show the times and events of an employee record. When an employee uses the Time Clock to “Clock In” and “Clock Out”, they create transactions. Miscellaneous hours like Vacation and Sick time are also transactions.

1. Open the *Configure Employee* Window by clicking on the **Employee** icon in the tool bar, or by selecting **Edit**, then **Employee**.



2. Select the Employee from the dropdown list to view their Timecard.

Configure Employee

99999 Test, Sam

Division: ALL
Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John
99999 Test, Sam

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	S
11/02/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
A 11/05/09	Thu				001	-	-	-	-	-	-	
A 11/06/09	Fri				001	-	-	-	-	-	-	
M 11/09/09	Mon			16:00	001	-	-	-	-	-	-	
11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
M 11/11/09	Wed		07:00		001	-	-	-	-	-	-	
11/12/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*

Auto Processing Show Schedule Forecasting Approve

Pay Periods back 1 Key
From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	8.00	8.00	0.00	48.00
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	1.00	0.00	6.00
Dollars	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Reprocess Add Trans Edit/Add Start Edit/Add Stop Multiple Misc From Schedule Delete

Print Close

- Click the **Add Trans** button to open the *Transaction Details* screen. The *Transaction Details* screen creates the transaction. Use the **Date** and **Time** fields to specify when the transaction happens. The **Function** field specifies what type of transaction to create. The **Clock** field selects the clock that the transaction is assigned. If a **Reason** code is required or needed select the reason code associated with this transaction. Use the **Override Round** option to have Genesis Pro ignore the rounding rules for this transaction. Use the **Override Attend** option to have Genesis Pro ignore the attendance rules for this transaction. Use the **Override Automatic Lunches and Breaks** option to have Genesis Pro ignore all lunch/break auto deductions. If the transaction is a *Miscellaneous Transaction*, the **Miscellaneous Information** area will be available.

Transaction Detail for 99999 Test, Sam

Date and Time
 11/05/2009 07:00:00 Thu

Function * CLOCKED IN

Clock 001 Demo TA520L

Reason

Override Round Override Attend
 Override Automatic Lunches and Breaks

ADDING TRANSACTION

OK Cancel

- Some transactions have more information than the Function key. *Department transfers*, *Job Costing*, and *Tips* have information that the employee would input at the clock.

Transaction Detail for 99999 Test, Sam

Date and Time
 11/05/2009 07:00:00 Thu

Function 0 ENTER DEPARTMENT

Clock 001 Demo TA520L

Reason

Override Round Override Attend

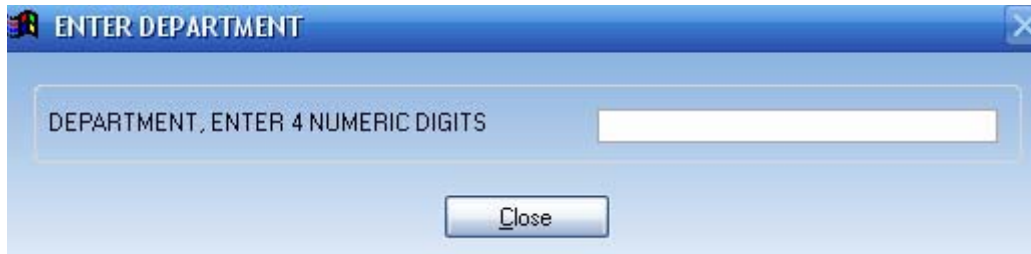
Prompts from Clock

Prompt 1	ENTER DEPARTMENT		...
Prompt 2			...
Prompt 3			...
Prompt 4			...

ADDING TRANSACTION

OK Cancel

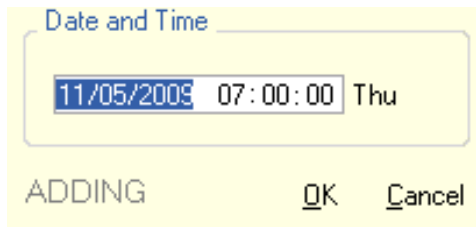
- If the transaction needs extra information, the Prompt list will show the levels. Click the box next to the input field and type the required information.



6. When finished configuring the transaction click **OK**. This will exit the *Transaction Details* screen and create the transaction. If you do not have **Auto processing** activated in the Online *Timecard* screen, click **Reprocess** button to see the changes.

NOTE:

A popup window is available to add Start and Stop entries. The popup window can be accessed by double clicking or a right click in the Start and Stop fields.



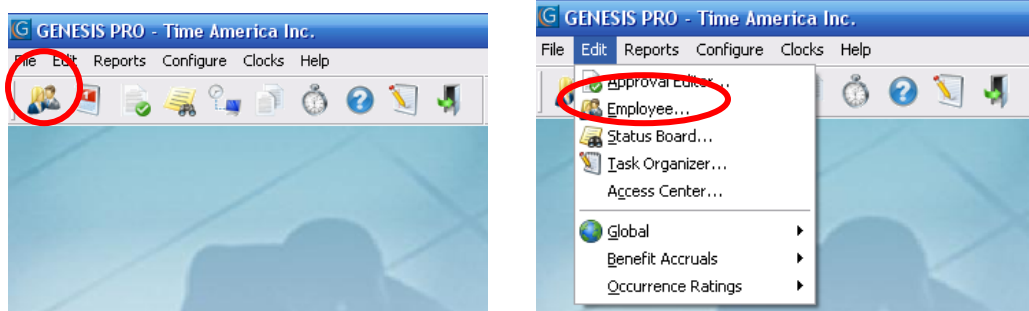
NOTES

ADDING TRANSACTIONS USING TRANSACTION MAINTENANCE

Adding Transactions Using Transaction Maintenance

Genesis Pro uses Transactions to show the times and events of an employee record. When an employee uses the Time Clock to “Clock In” and “Clock Out”, they create transactions. Miscellaneous hours like Vacation and Sick time are also transactions.

1. Open the *Configure Employee* Window by clicking on the **Employee** icon in the tool bar, or by selecting **Edit**, then **Employee**.



2. Select the Employee from the dropdown list; you will be taken to their *Timecard*.

Configure Employee

99999 Test, Sam

Division: ALL
Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John
99999 Test, Sam

Timecard Schedule Transactions Status Benefits Messages Wages Badges Profiles Clocks Detail

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	S
11/02/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
A 11/05/09	Thu				001	-	-	-	-	-	-	*
A 11/06/09	Fri				001	-	-	-	-	-	-	*
M 11/09/09	Mon			16:00	001	-	-	-	-	-	-	*
11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
M 11/11/09	Wed		07:00		001	-	-	-	-	-	-	*
11/12/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*

Auto Processing Show Schedule Forecasting Approve

Pay Periods back 1 Key
From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	8.00	8.00	0.00	48.00
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	1.00	0.00	6.00
Dollars	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Reprocess Add Trans Edit/Add Start Edit/Add Stop Multiple Misc From Schedule Delete

Print Close

- Click on the *Transactions* Tab to be taken to the *Transactions* window.

Configure Employee
99999 Test, Sam

Division: ALL
Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John
99999 Test, Sam

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Timecard Schedule **Transactions** Status Benefits Messages Wages Badges Profiles Clocks Detail

Day	Date	Time	Key	Prompt	Clock	Badge	Reason
Mon	11/02/2009	07:00:00	*	CLOCKED IN	001		
Mon	11/02/2009	16:00:00	#	CLOCKED OUT	001		
Tue	11/03/2009	07:00:00	*	CLOCKED IN	001		
Tue	11/03/2009	16:00:00	#	CLOCKED OUT	001		
Wed	11/04/2009	07:00:00	*	CLOCKED IN	001		
Wed	11/04/2009	16:00:00	#	CLOCKED OUT	001		
Mon	11/09/2009	16:00:00	#	CLOCKED OUT	001		
Tue	11/10/2009	07:00:00	*	CLOCKED IN	001		
Tue	11/10/2009	16:00:00	#	CLOCKED OUT	001		
Wed	11/11/2009	07:00:00	*	CLOCKED IN	001		
Thu	11/12/2009	07:00:00	*	CLOCKED IN	001		
Thu	11/12/2009	16:00:00	#	CLOCKED OUT	001		
Fri	11/13/2009	07:00:00	*	CLOCKED IN	001		
Fri	11/13/2009	16:00:00	#	CLOCKED OUT	001		

November 2009

SUPERVISOR
Badge 111111111
Name OPERATOR,SYSTEM
Date 11/18/2009
Time 15:43:04

PROMPT INPUT
CLOCKED IN

Add Edit Delete

Print Close

- Click the **Add** button to open the *Transaction Details* screen.
- The *Transaction Details* screen creates the transaction. Use the **Date** and **Time** fields to specify when the transaction happens. The **Function** field specifies what type of transaction to create. The **Clock** field selects the clock that the transaction is assigned. If a reason code is required or needed select the reason code associated with this transaction. Use the **Override Round** option to have Genesis Pro ignore the rounding rules for this transaction. Use the **Override Attend** option to have Genesis Pro ignore the attendance rules for this transaction. Use the **Override Automatic Lunches and Breaks** option to have Genesis Pro ignore all lunch auto deductions. If the transaction is a *Miscellaneous Transaction*, the **Miscellaneous Information** area will be available.

Transaction Detail for 99999 Test, Sam

Date and Time
11/02/2009 07:00:00 Mon

Function * CLOCKED IN

Clock 001 Demo TA520L

Reason

☐ Override Round ☐ Override Attend
☐ Override Automatic Lunches and Breaks

ADDING TRANSACTION

OK Cancel

- Some transactions have more information than the Function key. *Department transfers*, *Job Costing*, and *Tips* have information that the employee would input at the clock. If the transaction needs extra information, the Prompt list will show the levels. Click the box next to the *Input* field and type the required information.

Transaction Detail for 99999 Test, Sam

Date and Time
 11/02/2009 07:00:00 Mon

Function: 0 ENTER DEPARTMENT
 Clock: 001 Demo TA520L
 Reason: [Dropdown]
 Override Round Override Attend

Prompts from Clock

Prompt 1	ENTER DEPARTMENT	[Input Field]	[Menu Icon]
Prompt 2		[Input Field]	[Menu Icon]
Prompt 3		[Input Field]	[Menu Icon]
Prompt 4		[Input Field]	[Menu Icon]

ADDING TRANSACTION

OK Cancel

- When finished configuring the transaction, click **OK**. This will exit the *Transaction Details* screen and create the transaction.

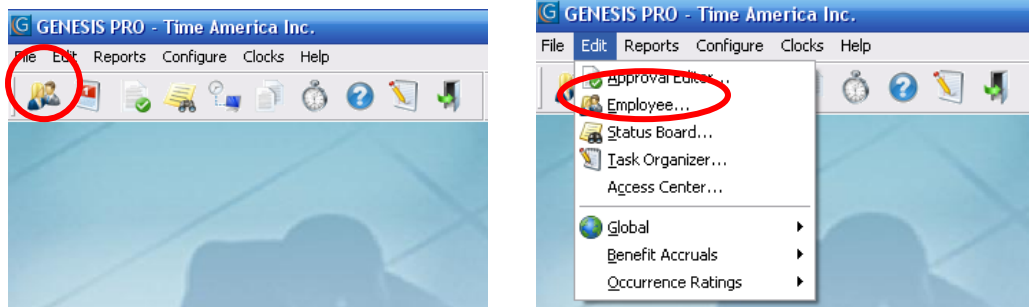
NOTES

EDITING EXISTING TRANSACTIONS USING THE ONLINE TIMECARD

Editing Existing Transactions in the Online Time Card

Editing transactions using the Online Time Card is an easy way to correct and update employee record, and see the results instantly.

1. Open the *Configure Employee* Window by clicking on the **Employee** Icon, or by selecting **Edit**, then **Employee**.



2. Select the Employee from the dropdown list to view their Timecard.

Configure Employee

99999
Test, Sam

Division: ALL
Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John
99999 Test, Sam

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	S
11/02/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
A 11/05/09	Thu				001	-	-	-	-	-	-	
A 11/06/09	Fri				001	-	-	-	-	-	-	
M 11/09/09	Mon			16:00	001	-	-	-	-	-	-	
11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
M 11/11/09	Wed				001	-	-	-	-	-	-	
11/12/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*

Auto Processing Show Schedule Forecasting Approve

Pay Periods back 1 Key
From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	8.00	8.00	0.00	48.00
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	1.00	0.00	6.00
Dollars	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Reprocess Add Trans Edit/Add Start Edit/Add Stop Multiple Misc. From Schedule Delete

Print Close

3. Using the Online *Timecard* we can modify an existing transaction. For our example we will change Thursday start time from "07:00:00" to "07:30:00". Select the first line for Thursday and click the **Edit/Add Start** button.

Configure Employee
99999 Test, Sam

Division: ALL
Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John
99999 Test, Sam

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	S
11/02/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
A 11/05/09	Thu				001	-	-	-	-	-	-	*
A 11/06/09	Fri				001	-	-	-	-	-	-	*
H 11/09/09	Mon				001	-	-	-	-	-	-	*
H 11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
H 11/11/09	Wed				001	-	-	-	-	-	-	*
11/12/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*

Auto Processing Show Schedule Forecasting Approve

Pay Periods back 1 Key
From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	8.00	8.00	0.00	48.00
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	1.00	0.00	6.00
Dollars	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Reprocess Add Trans **Edit/Add Start** Edit/Add Stop Multiple Misc. From Schedule Delete

Print Close

4. This will open the *Transaction Details* screen with a copy of the transaction selected. We want to change the start time for this transaction.

5. Modify the Time from "07:00:00" to "07:30:00".

Transaction Detail for 99999 Test, Sam

Date and Time
11/12/2009 07:00:00 Thu

Function * CLOCKED IN

Clock 001 Demo TA520L

Reason

Override Round Override Attend
Override Automatic Lunches and Breaks

EDITING TRANSACTION

OK Cancel

11/12/2009 07:30:00 Thu

6. Click **OK** to modify the existing transaction. This will also change the existing transaction in the *Transaction Maintenance* screen.

- Click **Reprocess** button to see the changes to the employee's totals.

Configure Employee
99999 Test, Sam

Division: ALL
Group: ALL

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	S
11/05/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/06/09	Fri				001	-	-	-	-	-	-	
11/09/09	Mon			16:00	001	-	-	-	-	-	-	
11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/11/09	Wed		07:00		001	-	-	-	-	-	-	
11/12/09	Thu	WORK	07:30	16:00	001	7.50	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*

Auto Processing Show Schedule Forecasting Approve Pay Periods back 1 Key
From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	7.50	8.00	0.00	55.50
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	1.00	0.00	7.00
Dollars	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Reprocess Add Trans Edit/Add Start Edit/Add Stop Multiple Misc. From Schedule Delete

Print Close

- The Transaction is now changed to "07:30:00" and the *Totals* have been updated.

NOTE:

A popup window is available to edit Start and Stop entries. The popup window can be accessed by double clicking or a right click in the Start and Stop fields.

Date and Time

11/12/2009 07:00:00 Thu

EDITING OK Cancel

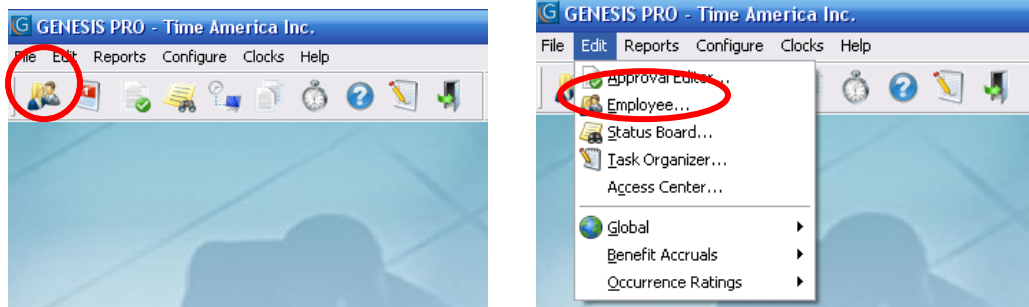
NOTES

FIXING MISSING PUNCHES IN THE EMPLOYEE'S TIME CARD

Fixing Missing Punches in the Employee's Time Card

Editing transactions using the Online Time Card is an easy way to correct and update employee record, and see the results instantly.

1. Open the *Configure Employee* Window by clicking on the **Employee** Icon, or by selecting **Edit**, then **Employee**.



2. Select the Employee from the dropdown list to view their *Timecard*.

Configure Employee

99999
Test, Sam

Division: ALL
Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John
99999 Test, Sam

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	\$
11/02/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/05/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
A 11/06/09	Fri				001	-	-	-	-	-	-	
M 11/09/09	Mon			16:00	001	-	-	-	-	-	-	
11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
M 11/11/09	Wed		07:00		001	-	-	-	-	-	-	
11/12/09	Thu	WORK	07:30	16:00	001	7.50	-	-	-	1.00	-	*
M 11/13/09	Fri		07:53		001	-	-	-	-	-	-	
M 11/13/09	Fri			16:00	001	-	-	-	-	-	-	

Auto Processing Show Schedule Forecasting Approve

Pay Periods back 1 Key
From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	7.50	0.00	0.00	47.50
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	0.00	0.00	6.00
Dollars	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Reprocess Add Trans Edit/Add Start Edit/Add Stop Multiple Misc. From Schedule Delete

Print Close

- Using the *Timecard* we can check for errors that were created by an employee not using the time clock correctly. Looking at the example below we can see on Friday the employee did not punch correctly. This is indicated by the “M” next to Friday’s transactions. Press the *Transactions* tab to check the sequence of Friday’s transactions.

Configure Employee

99999
Test, Sam

Division: ALL
Group: ALL

<< Prior Find Next >>

00001 Washington, Carol
00002 Baines, Peter
00003 Anderson, Frank
00004 Jones, David
00005 Smith, John
99999 Test, Sam

6 Listed
☒ Number ☐ Name
☐ Show Inactives

Timecard Schedule **Transactions** Status Benefits Messages Wages Badges Profiles Clocks Detail

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	S
11/02/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/05/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
A 11/06/09	Fri				001	-	-	-	-	-	-	
M 11/09/09	Mon			16:00	001	-	-	-	-	-	-	
11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
M 11/11/09	Wed		07:00		001	-	-	-	-	-	-	
11/12/09	Thu	WORK	07:30	16:00	001	7.50	-	-	-	1.00	-	*
M 11/13/09	Fri		07:53		001	-	-	-	-	-	-	
M 11/13/09	Fri			16:00	001	-	-	-	-	-	-	

Auto Processing Show Schedule Forecasting Approve

Pay Periods back 1 Key
From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	7.50	0.00	0.00	47.50
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	0.00	0.00	6.00
Dollars	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Reprocess Add Trans Edit/Add Start Edit/Add Stop Multiple Misc. From Schedule Delete

Print Close

- This will move us to the *Transactions* Tab. Looking at the sequence; we can see the employee forgot to create a “**CLOCK IN**” punch before they transferred departments. Because the department transfer was almost an hour later than their scheduled start time, we will create a “**CLOCK IN**” transaction. In our example the employee’s real start time was “07:00:00”.

The screenshot shows the 'Configure Employee' window for employee 99999 Test, Sam. The 'Transactions' tab is active, displaying a list of transactions for November 2009. The 'Add' button at the bottom is circled in red.

Day	Date	Time	Key	Prompt	Clock	Badge	Reason
Mon	11/02/2009	07:00:00	*	CLOCKED IN	001		
Mon	11/02/2009	16:00:00	#	CLOCKED OUT	001		
Tue	11/03/2009	07:00:00	*	CLOCKED IN	001		
Tue	11/03/2009	16:00:00	#	CLOCKED OUT	001		
Wed	11/04/2009	07:00:00	*	CLOCKED IN	001		
Wed	11/04/2009	16:00:00	#	CLOCKED OUT	001		
Thu	11/05/2009	07:00:00	*	CLOCKED IN	001		
Thu	11/05/2009	16:00:00	#	CLOCKED OUT	001		
Mon	11/09/2009	16:00:00	#	CLOCKED OUT	001		
Tue	11/10/2009	07:00:00	*	CLOCKED IN	001		
Tue	11/10/2009	16:00:00	#	CLOCKED OUT	001		
Wed	11/11/2009	07:00:00	*	CLOCKED IN	001		
Thu	11/12/2009	07:30:00	*	CLOCKED IN	001		
Thu	11/12/2009	16:00:00	#	CLOCKED OUT	001		
Fri	11/13/2009	07:53:00	0	ENTER DEPARTMENT	001		
Fri	11/13/2009	16:00:00	#	CLOCKED OUT	001		

November 2009

SUPERVISOR
Badge 111111111
Name OPERATOR,SYSTEM
Date 11/18/2009
Time 16:17:42

PROMPT
ENTER DEPARTMENT

INPUT
002

Buttons: Add, Edit, Delete, Print, Close

- Click the **Add** button to create a new transaction.
- This will open the *Transaction Details* screen with a copy of the transaction selected. We want to add the *Start Time* and the *Function* of the transaction.
- Modify the Time from "07:53:00" to "07:00:00" and Change the Function to "**CLOCKED IN**".

The top screenshot shows the 'Transaction Detail for 99999 Test, Sam' window. The 'Date and Time' field is circled in red, showing '11/13/2009 07:53:00'. The 'Function' dropdown is also circled in red, showing '0 ENTER DEPARTMENT'. The 'Clock' field shows '001 Demo TA520L'. The 'Reason' field is empty. The 'Override Round' and 'Override Attend' buttons are visible.

The bottom screenshot shows the same window after modifications. The 'Date and Time' field now shows '11/13/2009 07:00:00'. The 'Function' dropdown now shows 'CLOCKED IN'. The 'Clock' field remains '001 Demo TA520L'. The 'Reason' field is empty. The 'Override Round' and 'Override Attend' buttons are visible. A new button 'Override Automatic Lunches and Breaks' is also present.

- Click **OK** to create the new transaction. This will create the new transaction in the *Transaction Maintenance* screen.

Configure Employee

99999 Test Sam

Division: ALL

Group: ALL

Transactions

Day	Date	Time	Key	Prompt	Clock	Badge	Reason
Mon	11/02/2009	07:00:00	*	CLOCKED IN	001		
Mon	11/02/2009	16:00:00	#	CLOCKED OUT	001		
Tue	11/03/2009	07:00:00	*	CLOCKED IN	001		
Tue	11/03/2009	16:00:00	#	CLOCKED OUT	001		
Wed	11/04/2009	07:00:00	*	CLOCKED IN	001		
Wed	11/04/2009	16:00:00	#	CLOCKED OUT	001		
Thu	11/05/2009	07:00:00	*	CLOCKED IN	001		
Thu	11/05/2009	16:00:00	#	CLOCKED OUT	001		
Mon	11/09/2009	16:00:00	#	CLOCKED OUT	001		
Tue	11/10/2009	07:00:00	*	CLOCKED IN	001		
Tue	11/10/2009	16:00:00	#	CLOCKED OUT	001		
Wed	11/11/2009	07:00:00	*	CLOCKED IN	001		
Thu	11/12/2009	07:30:00	*	CLOCKED IN	001		
Thu	11/12/2009	16:00:00	#	CLOCKED OUT	001		
Fri	11/13/2009	07:00:00	*	CLOCKED IN	001		
Fri	11/13/2009	07:53:00	0	ENTER DEPARTMENT	001		
Fri	11/13/2009	16:00:00	#	CLOCKED OUT	001		

November 2009

SUPERVISOR
Badge: 1111111111
Name: OPERATOR.SYSTEM
Date: 11/18/2009
Time: 16:26:50

PROMPT: CLOCKED IN

INPUT

Buttons: Add, Edit, Delete, Print, Close

- Press the *Timecard* tab, and reprocess if auto processing is not enabled, to see the changes to the employees *Totals*.

Configure Employee

99999 Test Sam

Division: ALL

Group: ALL

Timecard

Date	Day	Cat	Start	Stop	Department	Reg	OT1	OT2	OT3	Unpaid	Dollars	S
11/02/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/05/09	Thu	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/06/09	Fri	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/09/09	Mon	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/10/09	Tue	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/11/09	Wed	WORK	07:00	16:00	001	8.00	-	-	-	1.00	-	*
11/12/09	Thu	WORK	07:30	16:00	001	7.50	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:00	07:53	001	0.88	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:53	16:00	002	7.12	-	-	-	1.00	-	*

Totals

Reg: 0.00, 0.00, 8.00, 0.00, 7.50, 8.00, 0.00, 55.50

OT1: 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00

OT2: 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00

OT3: 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00

Unpaid: 0.00, 0.00, 1.00, 0.00, 1.00, 1.00, 0.00, 7.00

Dollars: 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00, 0.00

Buttons: Reprocess, Add Trans, Edit/Add Start, Edit/Add Stop, Multiple Misc., From Schedule, Delete, Print, Close

- The "M" next to Friday has now disappeared. This means that Friday's transactions are in the correct sequence.

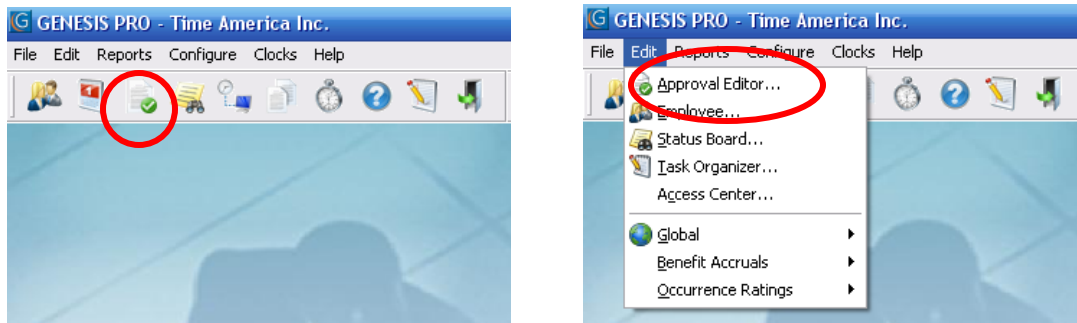
NOTES

USING THE APPROVAL EDITOR

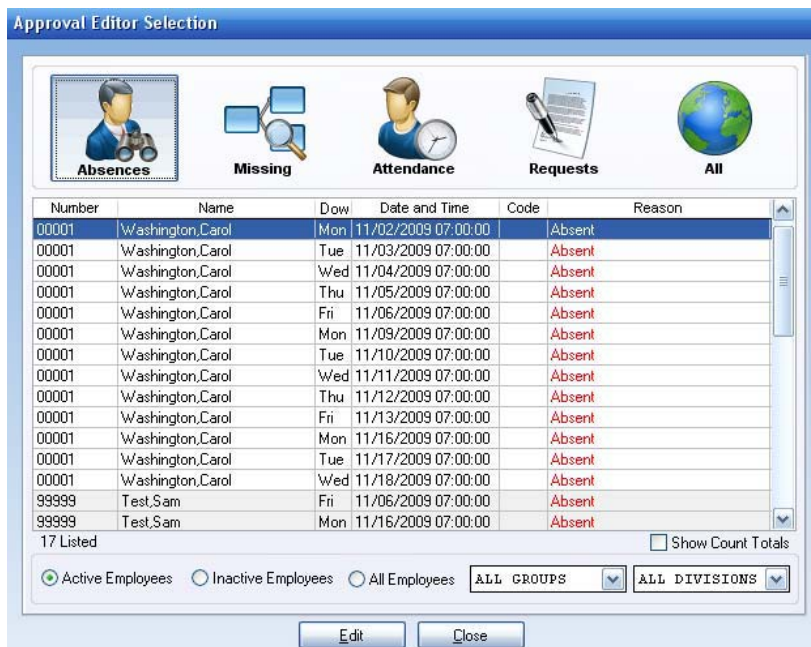
Using the Approval Editor

The Approval Editor is a useful tool for editing and reporting employee errors. It can report Missing Punches, Absences, and Attendance infractions for employees thus allowing you to make changes to the employee's Time Card.

1. To open the *Approval Editor* click on the **Approval Editor** icon, or select **Edit**, then select **Approval Editor**.



2. This will open the *Approval Editor Selection* screen. From this screen you can view all employee infractions based on the options you select. Absences, Missing Punches and Attendance Infractions can be displayed.
3. To filter the information, select **Absences**, **Missing**, **Attendance** or **Requests**. The **Absences** selection will only show Absences. The **Missing** selection will only show Missing Punches and Other Exceptions. The **Attendance** selection will only show *Attendance Infractions (Attendance Codes)*. The **Requests** selection will only show Time-Off Requests submitted by the employee. If **All** is selected, all information will be displayed. You can also filter employees by **Groups** and **Divisions**.



4. Select the **Missing** option to view only Missing Punches. This will make finding *Missing Punches and Other Exceptions* easier.
5. The Approval Editor displays employee Sam Test with a *Missing Punch* for Monday—November 9, 2009. Select the transaction and press the **Edit** button.

[illegible]

6. This will open a special *Online Timecard* for the employee.
7. Select Monday and look at the sequence. The employee has a Clock Out at "16:00:00", but the employee did not Clock In.

Approval for Employee 99999 Test,Sam

Timecard Schedule Transactions

Date	Day	Cat	Start	Stop	Reg	OT1	OT2	OT3	Unpaid	Dollars	S	
11/02/09	Mon	WORK	07:00	16:00	OG	8.00	-	-	-	1.00	-	*
11/03/09	Tue	WORK	07:00	16:00	OG	8.00	-	-	-	1.00	-	*
11/04/09	Wed	WORK	07:00	16:00	OG	8.00	-	-	-	1.00	-	*
11/05/09	Thu	WORK	07:00	16:00	OG	8.00	-	-	-	1.00	-	*
11/06/09	Fri					-	-	-	-	-	-	
11/09/09	Mon			16:00								
11/10/09	Tue	WORK	07:00	16:00	OG	8.00	-	-	-	1.00	-	*
11/11/09	Wed		07:00									
11/12/09	Thu	WORK	07:30	IL 16:00	OG	7.50	-	-	-	1.00	-	*
11/13/09	Fri	WORK	07:00	07:53		0.88	-	-	-	-	-	*
11/13/09	Fri	WORK	07:53	16:00	OG	7.12	-	-	-	1.00	-	*

Auto Processing Show Schedule Approve Pay Periods back 1 Key From 11/01/2009 to 11/14/2009

	11/08/2009	11/09/2009	11/10/2009	11/11/2009	11/12/2009	11/13/2009	11/14/2009	Totals
Reg	0.00	0.00	8.00	0.00	7.50	8.00	0.00	55.50
OT1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
OT3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid	0.00	0.00	1.00	0.00	1.00	1.00	0.00	7.00
Dollars	0.00	0.00	0.88	0.00	0.00	0.00	0.00	0.00

Reprocess Add Trans Edit/Add Start Edit/Add Stop Multiple Misc. From Schedule Delete Close

- Select the line for Monday and click the **Edit/Add Start** button. This will open the *Transaction Detail* screen.
- Create a new transaction with the correct *Time* and *Function*. In our example, the employee started their shift at "07:00:00", with a "Clocked In".

Transaction Detail for 99999 Test,Sam

Date and Time

11/09/2009 07:00:00 Mon

Function * CLOCKED IN

Clock 001 Demo TA520L

Reason

Override Round Override Attend

Override Automatic Lunches and Breaks

ADDING TRANSACTION

OK Cancel

- Click **OK** to create the new transaction. Press the **Reprocess** button if *Auto Processing* is not enabled. This will update the *Online Timecard* and show the correct totals for Monday.
- After correcting any other errors in the employee's time card click **Close** to return to the Approval Editor.

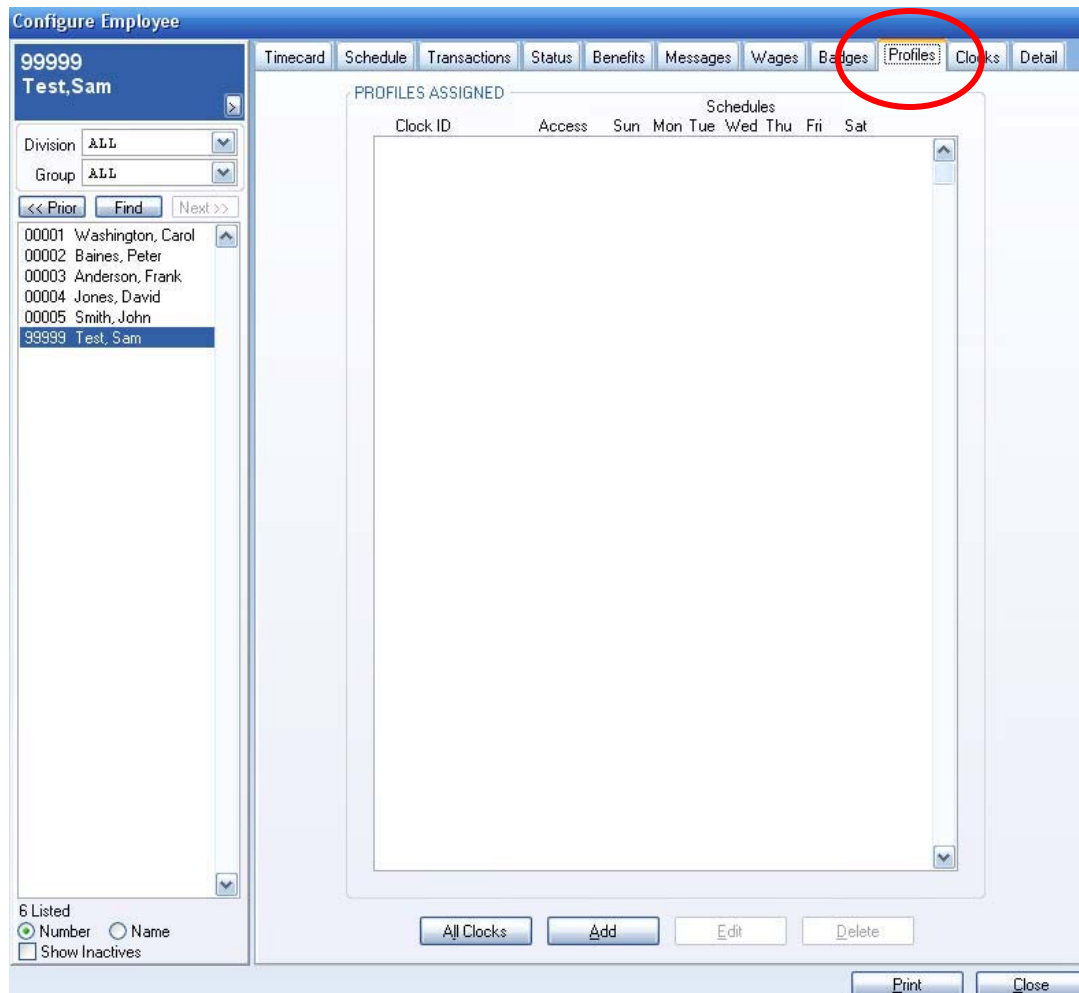
NOTES

ADDING EMPLOYEES TO THE TIMECLOCK FOR PROFILE LOCKOUTS

Adding an Employee to the Time Clock for Profile Lockouts

Profile Lockouts are schedules the Time Clock uses to restrict Employee Access. If an Employee is new, you need to update the Time Clock to restrict the new employee.

1. After the employee has been added, they need to be assigned to a *Profile*. While adding the employee, one of the options will be the *Profile Assignments* Screen. If this step was skipped when the employee was first added, you can access this screen by selecting the employee by name or employee number from the drop down list and select the *Profiles* Tab. This will take you to the *Profile Assignments* Screen.



2. In the *Profile Assignment* screen click the **Add** button. This will open the *Profile Assignment Details* screen to configure the profile for the employee.

Profile Assignment Detail for 99999

Clock ID: 001 Demo TA520L

Profile in use: 0001 Default Profile every 30 min.

☒ Valid Access

Sunday: Schedule 1

Monday: Schedule 1

Tuesday: Schedule 1

Wednesday: Schedule 1

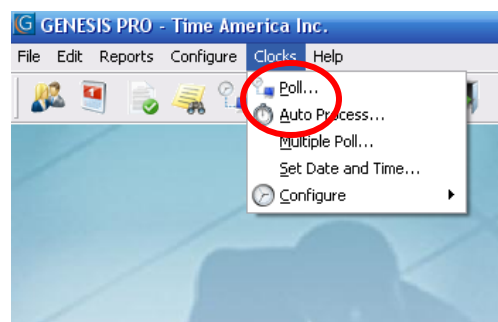
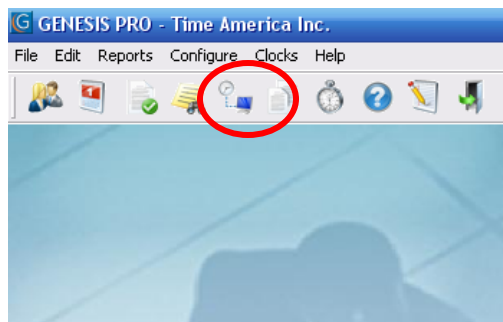
Thursday: Schedule 1

Friday: Schedule 1

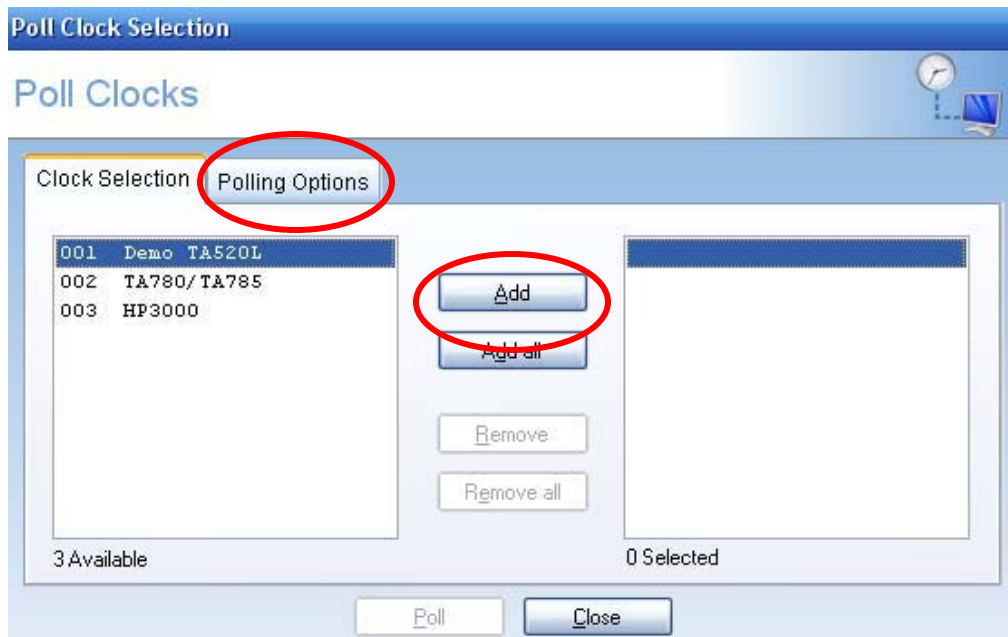
Saturday: Schedule 1

OK Cancel

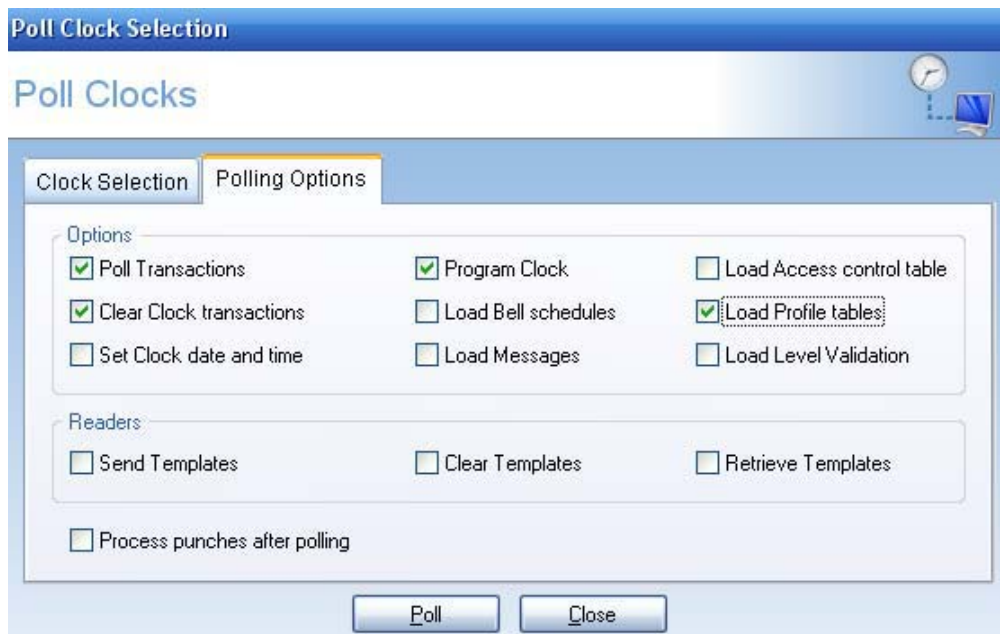
3. From this screen, you can select Clocks that have profiles in use. Since *Demo TA520L* is the only clock that is using Profiles, select it. The **Profiles in use** shows the name of the Profile that the clock is assigned. Make sure that **Valid Access** is selected.
4. Each day can be configured to use different *Profile Schedules*. This is useful for employees that work different hours each day. Select the *Profile Schedule* that matches the Employee Hours Schedule. Once each day is configured, click **OK**.
5. Now that the employee is configured, you need to update the time clock to restrict the employee. Click on the **Poll Terminals** icon, or select **Clocks**, and then **Poll**.



6. Select the time clock and click the **Add** button, this will move the time clock from the left window to the right window. After moving the time clock, select the *Polling Options* tab.



7. Select all options needed for your particular clock. In the example, **Poll Transactions**, **Clear Clocks Transactions**, **Program Clock**, and **Load Profile Tables** have been selected.



8. Click the **Poll** button to start programming the clock. Now the time clock will have your Employee Profile Assignments. If any of the checked options do not take place, Genesis Pro will display an *Error Report* that can be printed.

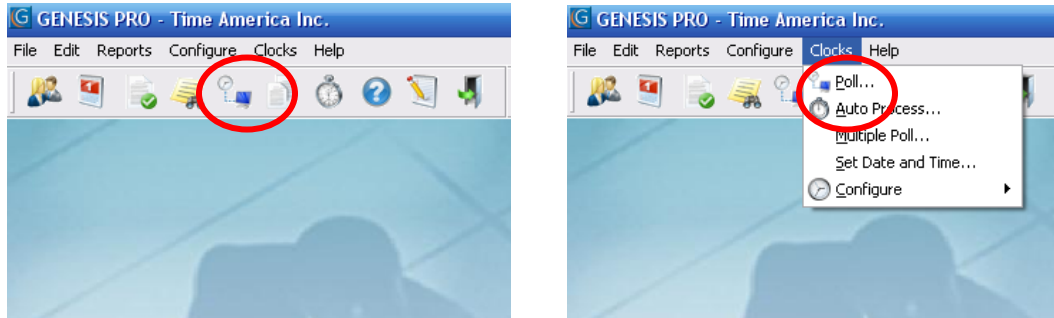
NOTES

MANUALLY POLLING THE TIME CLOCKS

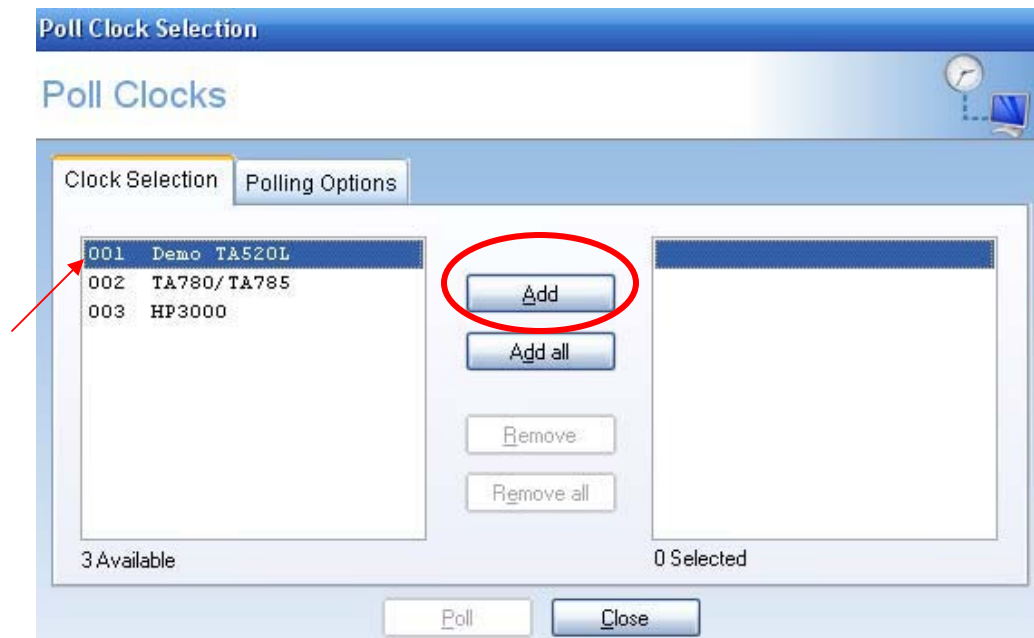
Manually Polling the Time Clocks

Genesis Pro allows the system user to retrieve and update the employees Time Card by manually polling each terminal. Before you can poll a terminal you do need a polling key or a system key attached to the parallel port or USB of your computer.

1. Click on the **Poll Terminals** icon, or select **Clocks**, and then **Poll**.

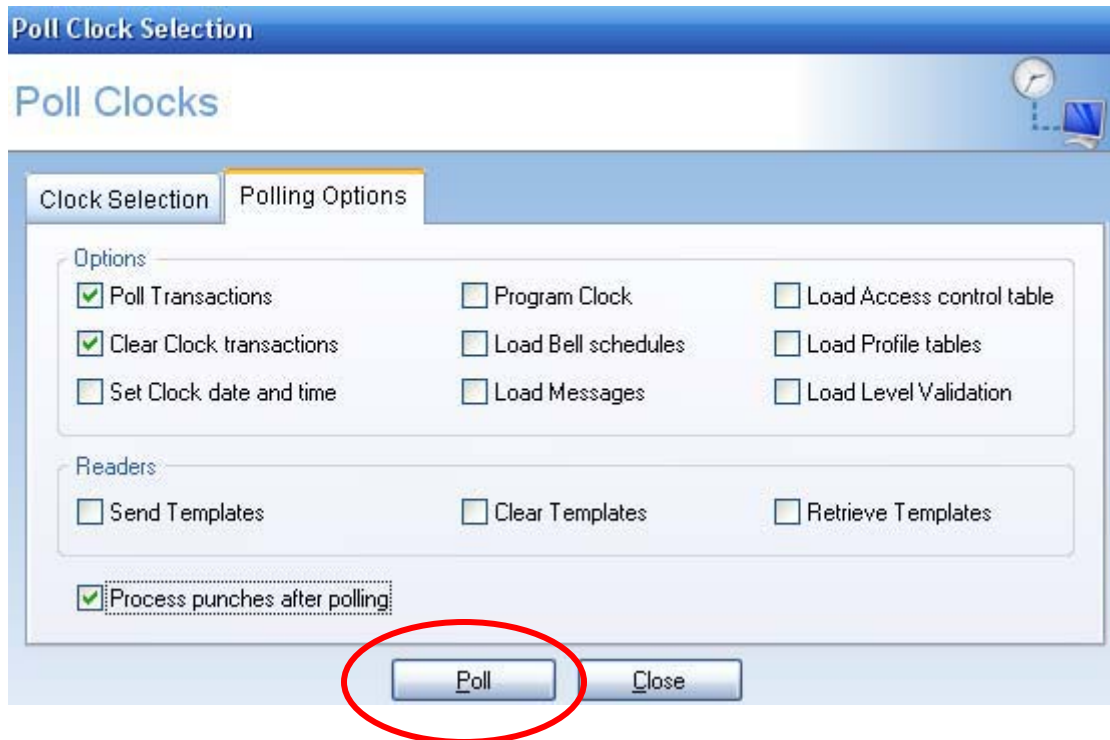


2. This will open the *Poll Clock Selection* Screen.



3. Select the clock in the left window and click the **Add** button. This will move the clock to the right window. To choose every clock in the left window use the **Add all** button.
4. Select the *Polling Options* Tab to move to the *Polling Options* screen.

5. Select the **Poll Transactions**, **Clear Clocks transactions**, and **Process punches after polling**.



6. The **Poll Transactions** option will retrieve all the punches from the selected time clocks. The **Clear Clocks transactions** option will remove all transactions from the selected time clocks. **Clear Clocks transactions** cannot be selected without first selecting **Poll Transactions**. Removing polled transactions from the time clock makes room for new transactions. The **Process punches after polling** option will update the Timecards to show the new transactions.
7. Click the **Poll** button to start the download process. Now the selected time clocks will be cleared of all old transactions and have extra space for new transactions. If a clock does not poll, Genesis Pro will display an *Error Report* that you can print.

NOTES



Quick Reference Guide

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www.centraltimeclock.com/support



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