GENESIS PRO

Quick Reference Guide

Central Time Clock
Since 1931

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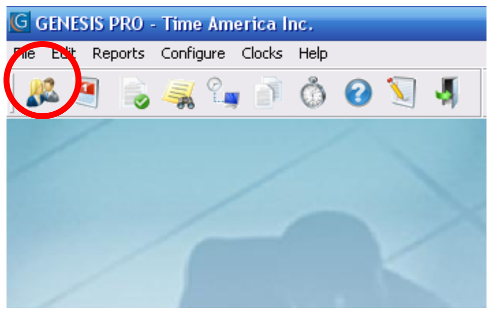
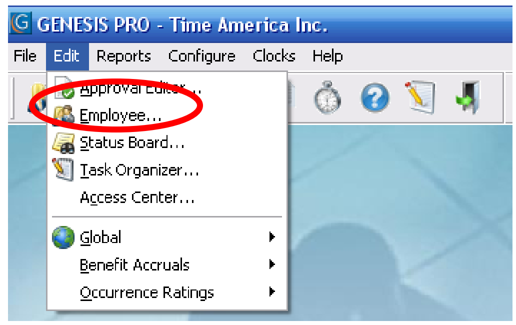
ADDING NEW EMPLOYEES

Adding New Employees

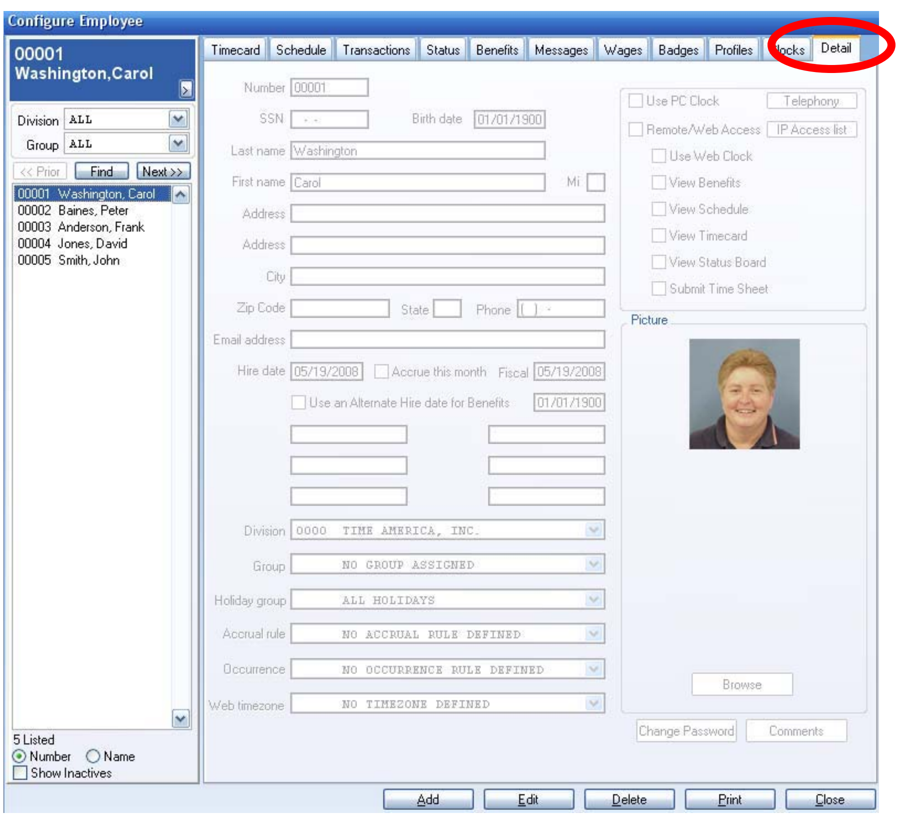
As a company grows, hiring more employees is an expected experience. Genesis Pro makes adding new employees simple by walking the system user through the screens necessary to fully configure the new employee's assignments and options. Depending on the options selected in the Main Company setup, you might 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.

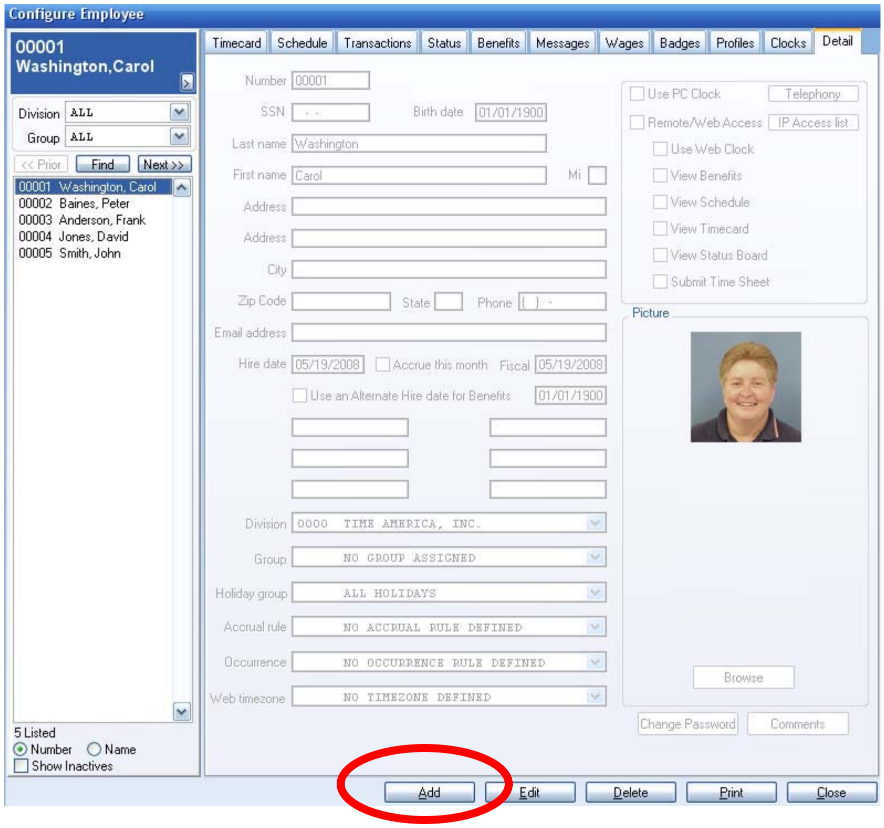




2. In the *Configure Employee* screen, press the **Detail** tab to change to the Employees Details.

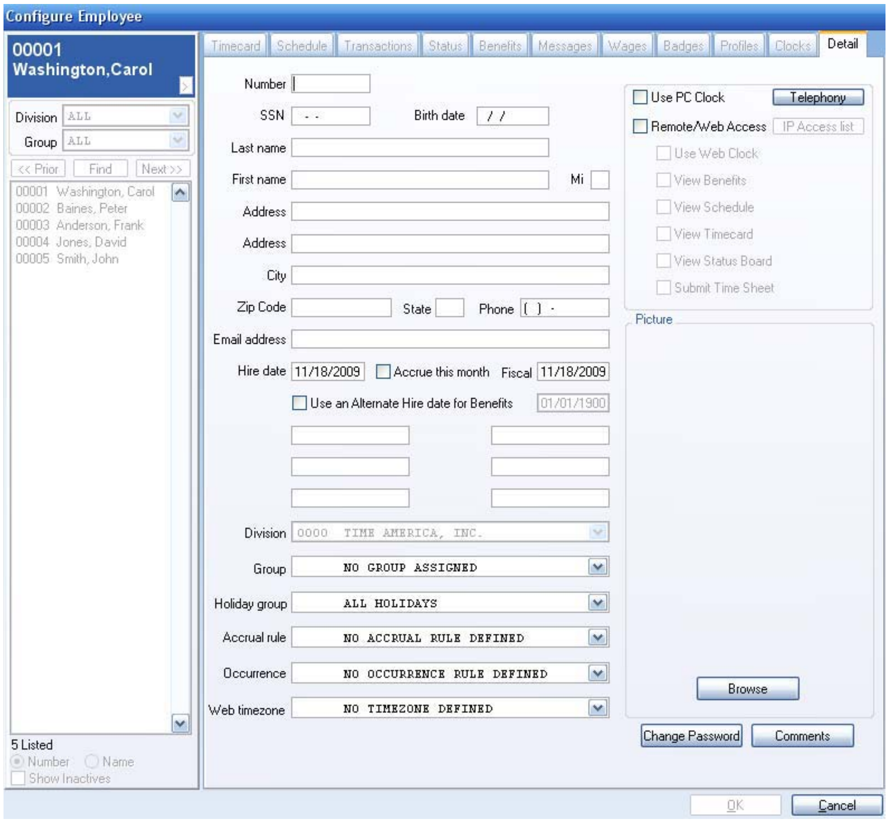


3. Click the **Add** button at the bottom of the window to add a new employee.

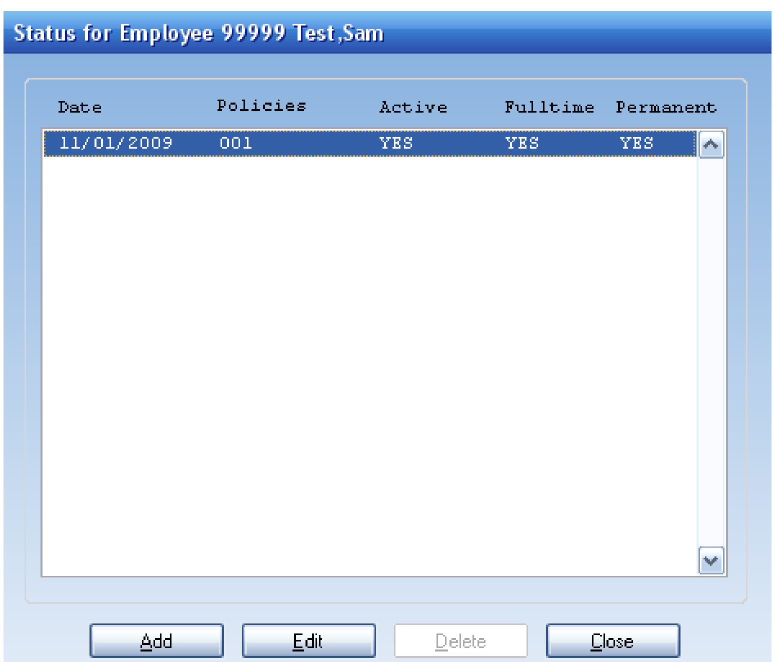


4. All the fields will be blank, with the Hire date and the Fiscal date set to the Current system date.

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.



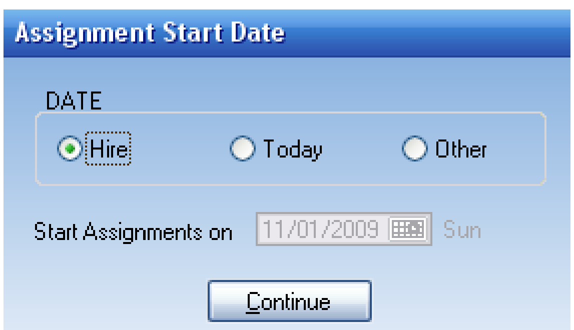
6. You can also input a picture into the employee's record by selecting the Browse button and picking the picture file to use. A bitmap file (.BMP) must be located in the Images directory under the Genesis Pro main folder on the computer to add a picture. Add any Comments then click **OK.** This will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



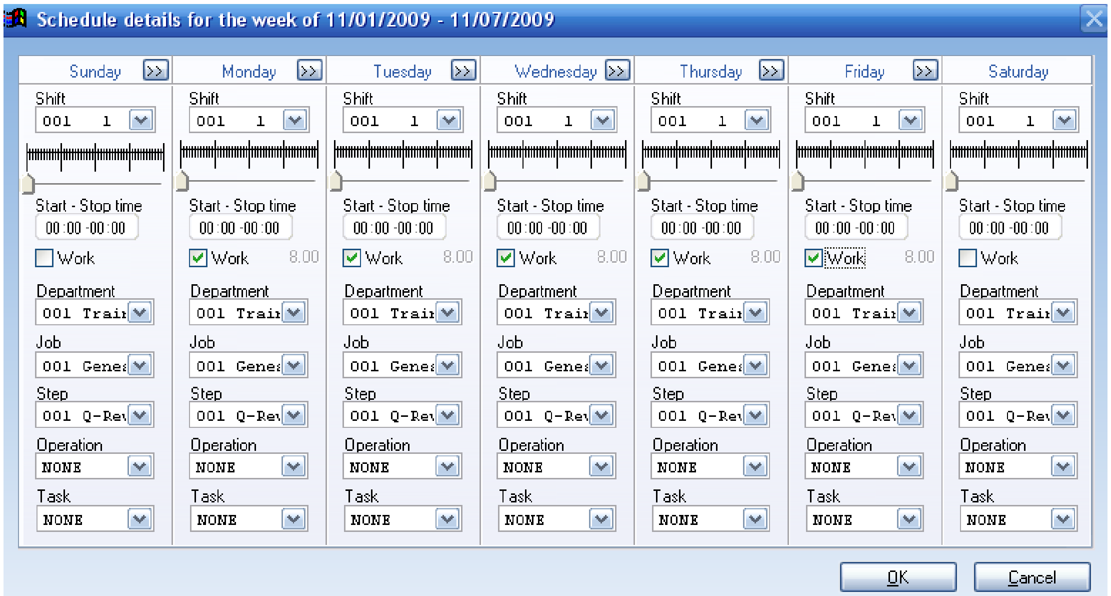
7. The Status will auto populate with the Hire Date as the Status Date, the First Policy, Active Status, Fulltime Status, and Permanent Status.

8. 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.**

9. 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.



10. 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.

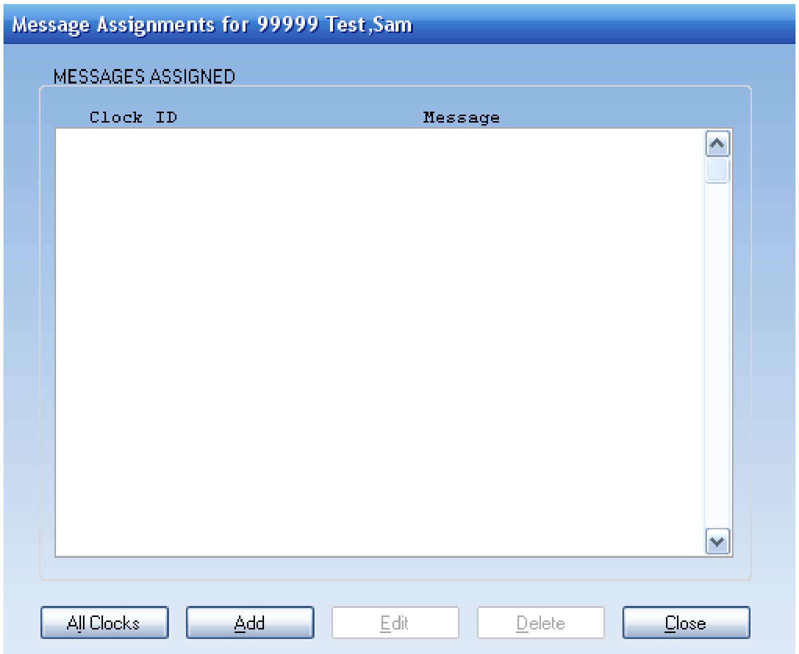


11. Starting on Sunday, change the **Shift** and assign the employee to a Department, Job, Step, Operation and Task (if in use) by clicking in the appropriate field. If the employee has the same schedule each day, select the >> (update the rest of the week option) or continue to change the days until they reflect the employee’s schedule.

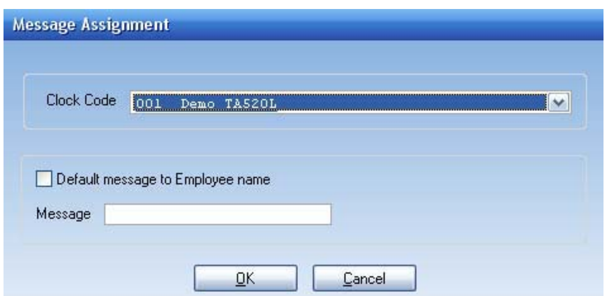
12. You can enter a specific **Shift Override** start and stop schedule change time for rounding rule purposes only. You may also use the graphic timeline to define the same.

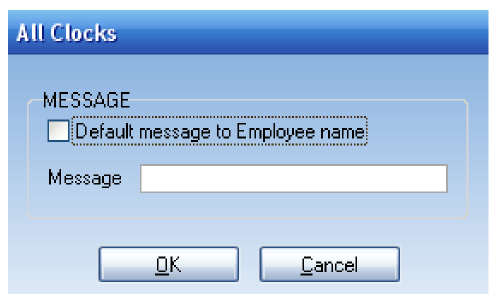
13. Check the **Work** box for each day the employee is scheduled to work. Click **OK** to accept.

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.



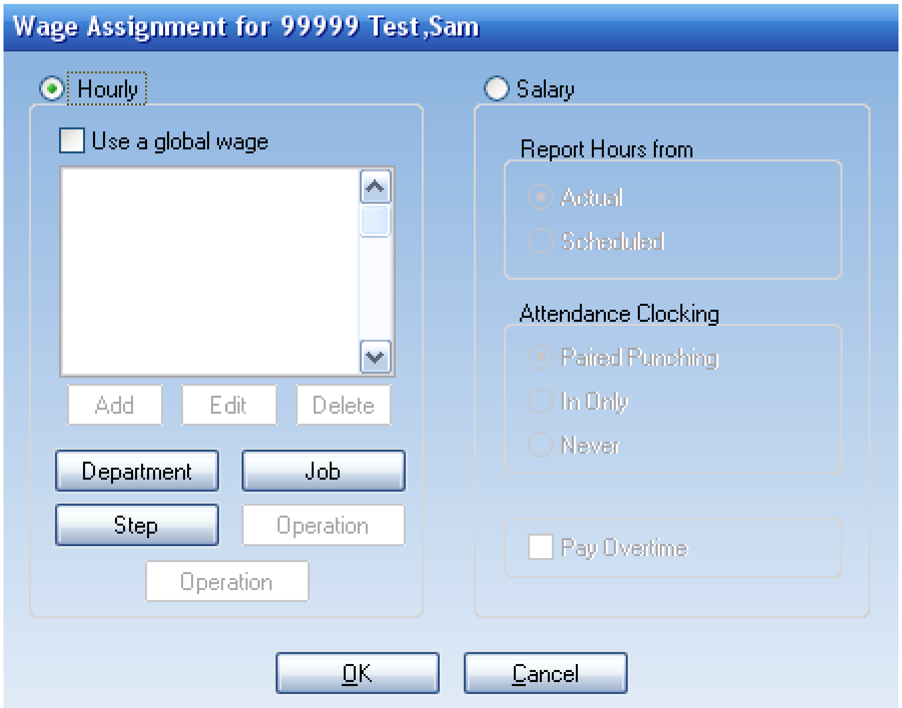
15. If the **Add** button is pressed, the Message Assignment screen will display. If the **All Clocks** button is pressed, only the *Message* area is visible.



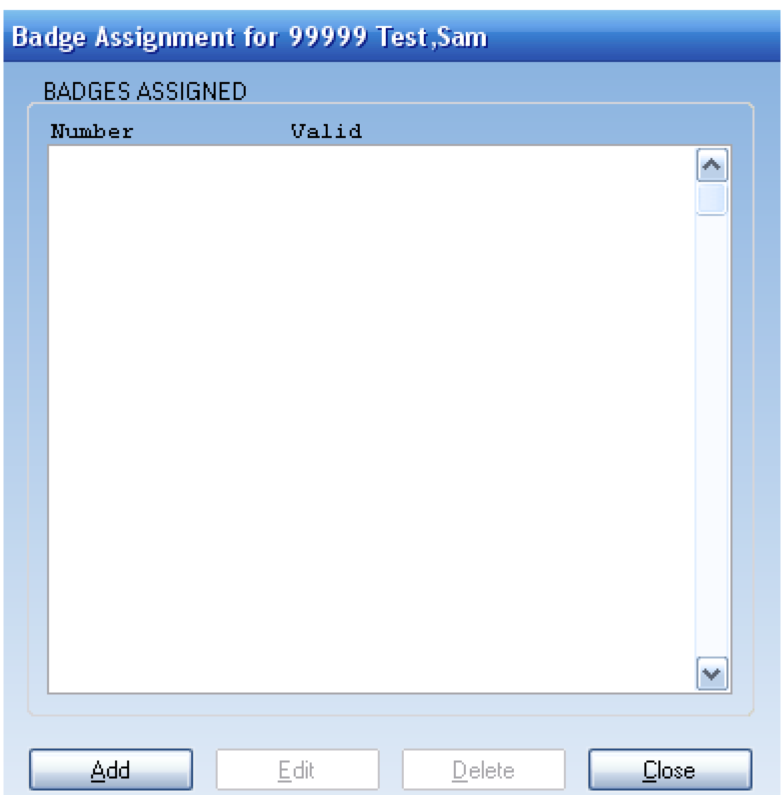


16. Enter the Message or use the **Default message to Employee Name** option. Click **OK** to return to the *Message Assignments* screen. Click **Close** to continue. If *Wages* is selected in the *Main Company Setup*, you will see the *Wage Assignment screen*.

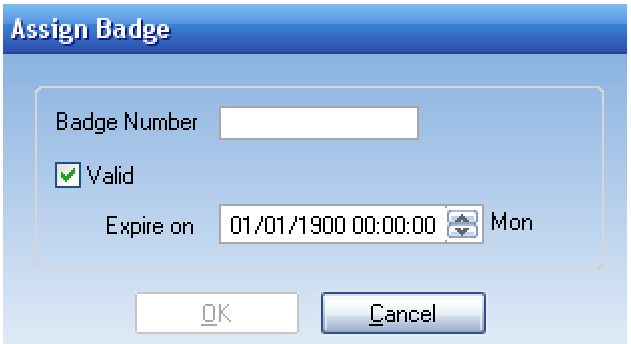
17. The *Wage Assignment* screen configures the employee for exempt or non-exempt status. Select the option that fits the employee wage rule. If the employee is non exempt select the wage by department, step, job, operation, or task (if in use). Otherwise, select the **Use a global wage** option.



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.



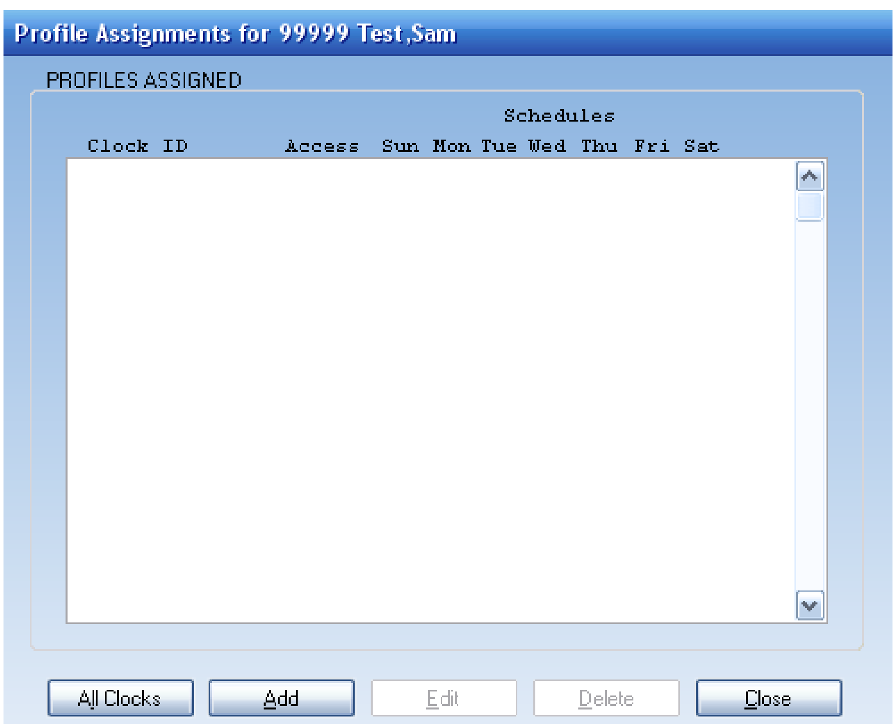
19. The *Badge Assignment* screen selects the badge number(s) for the employee. Click the **Add** button to open the *Assign Badge* screen. Enter the Badge number, check the **Valid** box and define the expiration date of the badge number, then click **OK.** If the employee has more than one badge, repeat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



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.

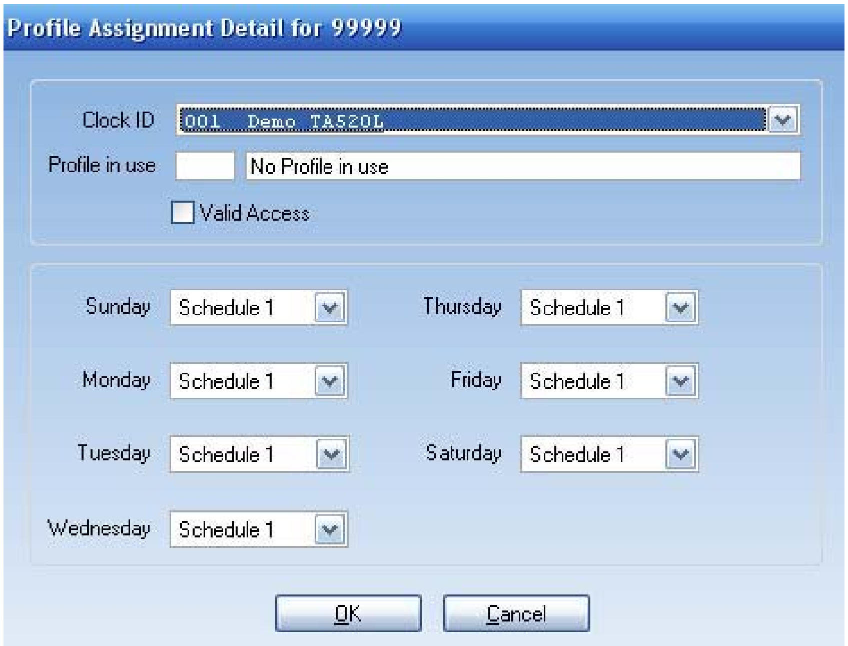
21. After the badges are entered click **Close** go to the *Profile Assignments* screen.

22. If the Profiles Module is installed you can assign the employee to a profile schedule.



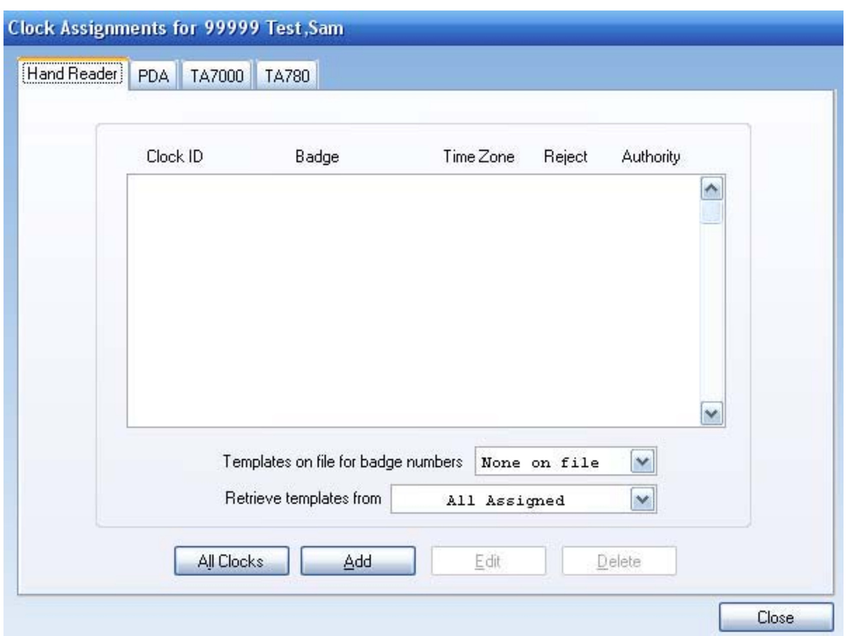
23. This screen configures the employees' restrictions on their use of the Time Clock. Click the **Add** button to configure a profile schedule for each clock The **All Clocks** button will send a single schedule to all clocks. If the **Add** button is pressed, the

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



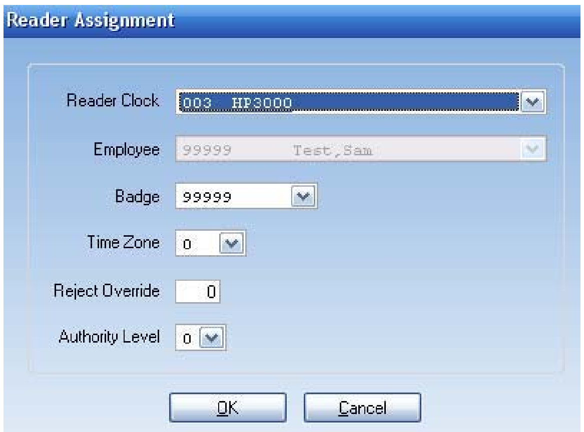
24. Profiles must be assigned to the clocks before you can assign them to the employees. The Profile in use will show the name of the profile assigned to the clock. Select the Valid Access option. Assign the correct schedules for each day. Then click **OK** to finish. The clock must be programmed after 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.

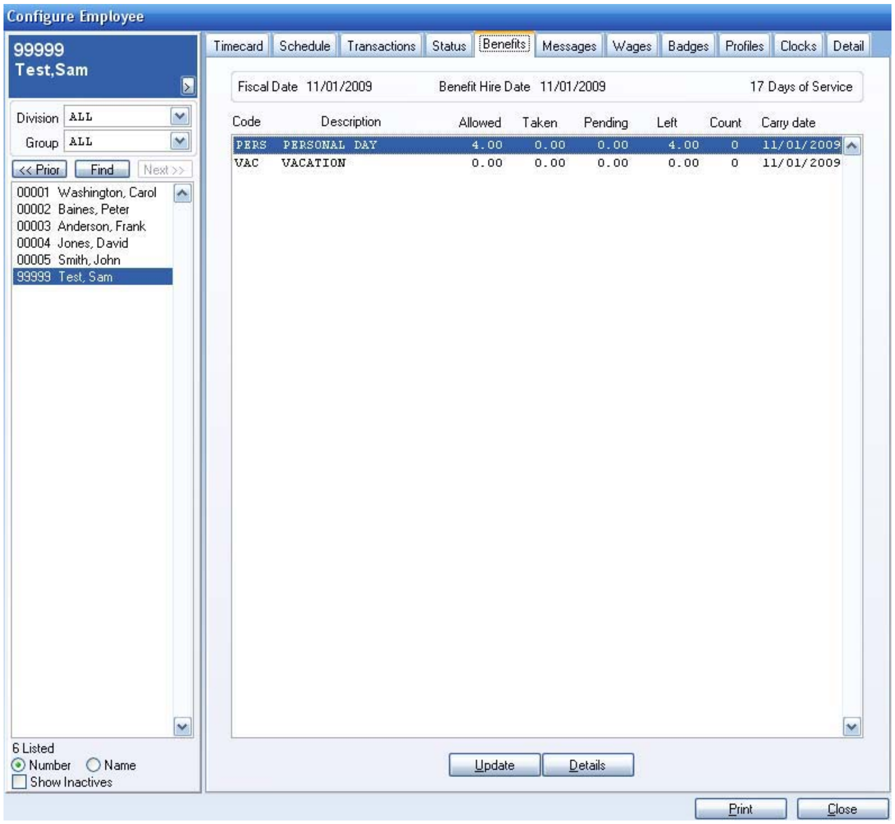
27. If the **Add** button is selected, the Reader Assignment screen will display. If the **All Clocks** button is selected, only the *Add* area is visible.



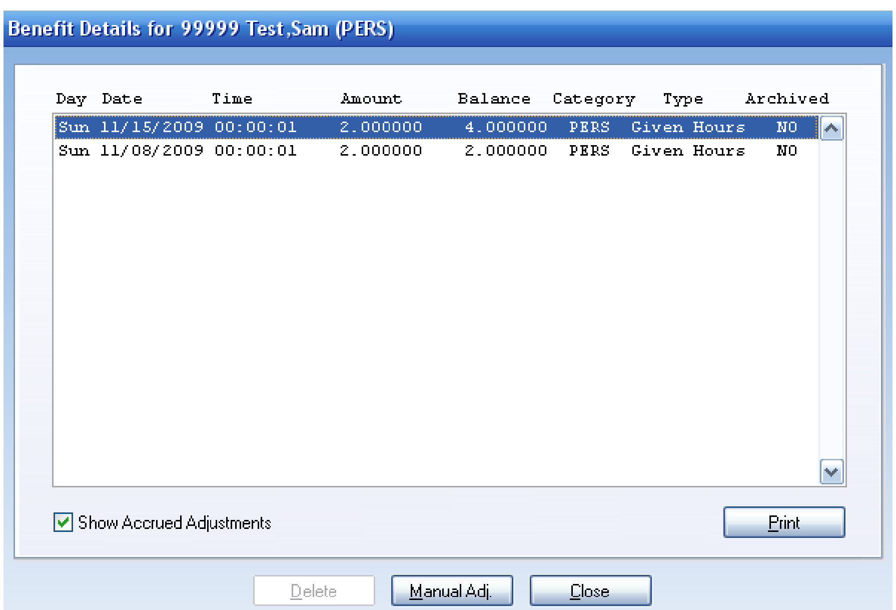
28. Continue to add the necessary clocks to the employee then click **Close** in the *Clock Assignments* screen to finish.

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.



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.



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

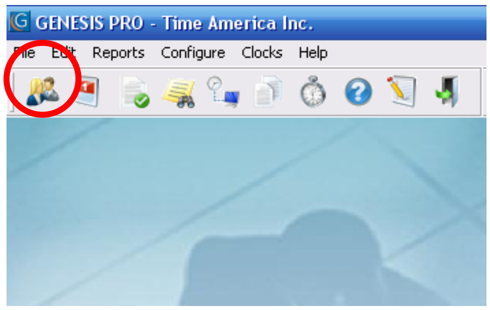
NOTES

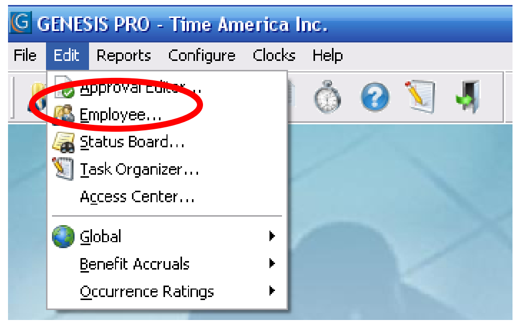
ADDING TRANSACTIONS USING THE ONLINE TIMECARD

Adding Transactions Using the Online Timecard

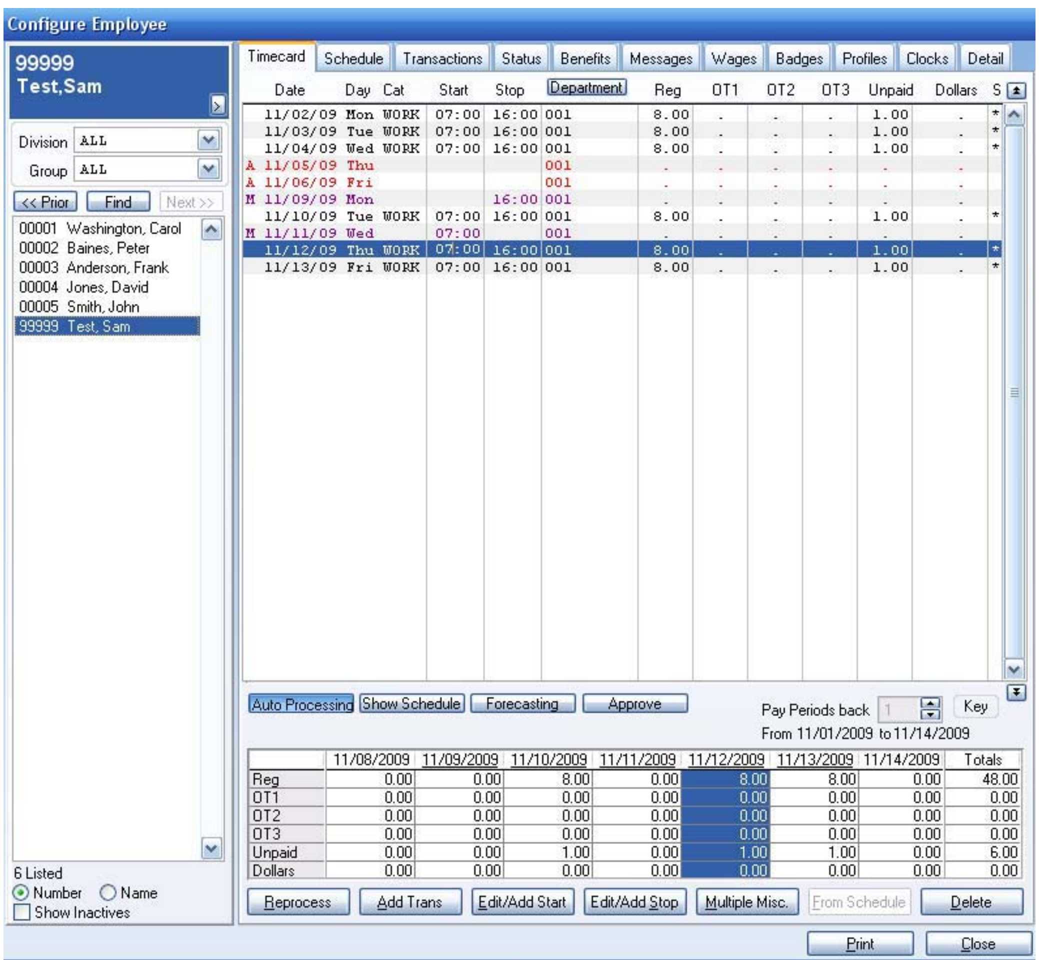
Genesis Pro uses Transactions to show the times and events of an employee record. When an employee uses the Time Clock to "Clock In" and "Clock Out", they create transactions. Miscellaneous hours like Vacation and Sick time are also transactions.

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

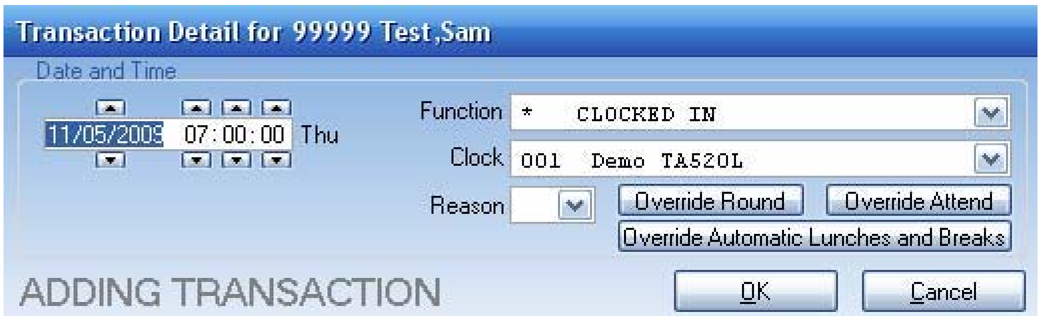




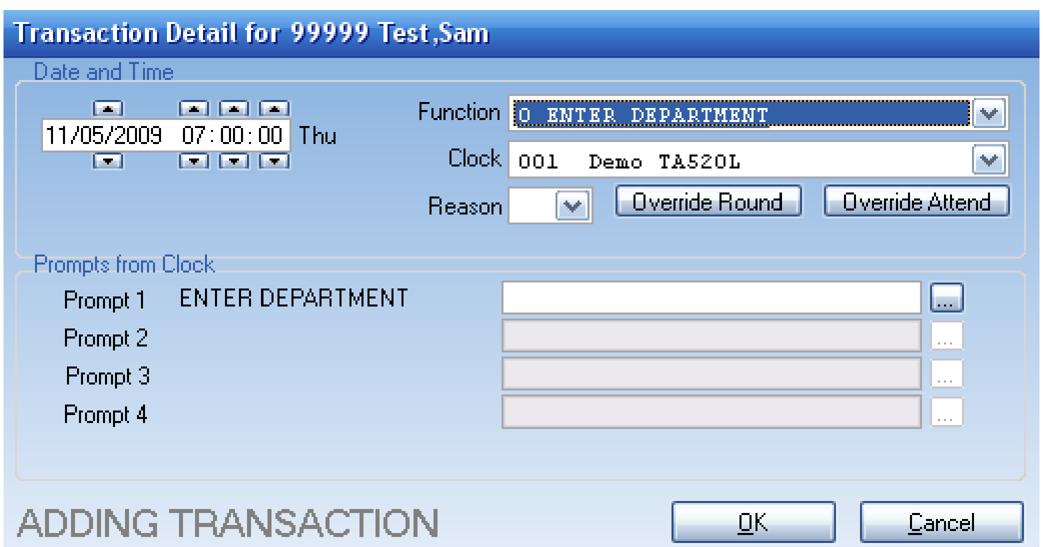
2. Select the Employee from the dropdown list to view their Timecard.



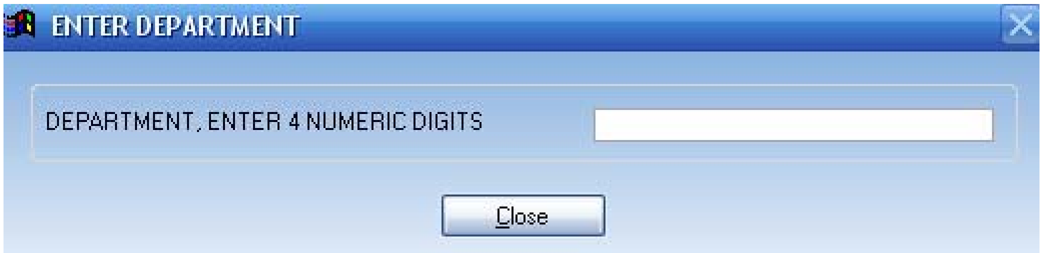
3. Click the **Add** Trans button to open the *Transaction Details* screen. The *Transaction Details* screen creates the transaction. Use the **Date** and **Time** fields to specify when the transaction happens. The **Function** field specifies what type of transaction to create. The *Clock* field selects 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.



4. 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.



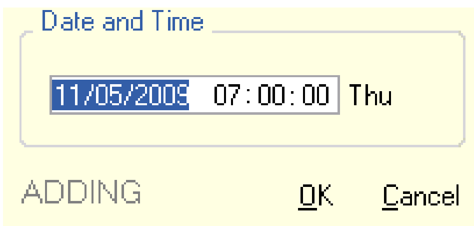
5. If the transaction needs extra information, the Prompt list will show the levels. Click the box next to the input field and type the required information.



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.



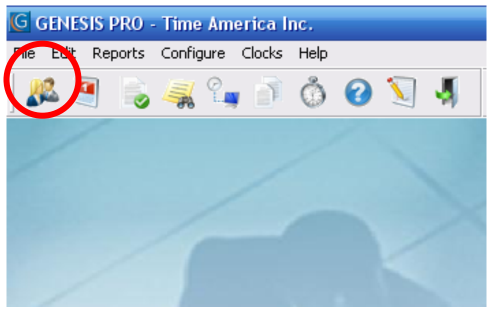
NOTES

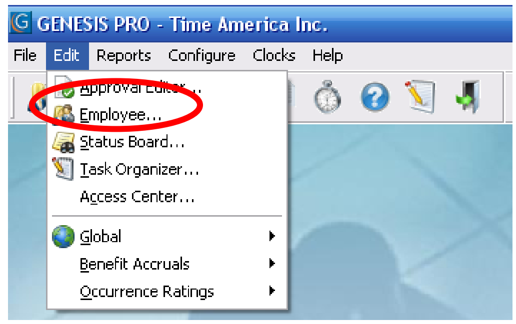
ADDING TRANSACTIONS USING TRANSACTION MAINTENANCE

Adding Transactions Using Transaction Maintenance

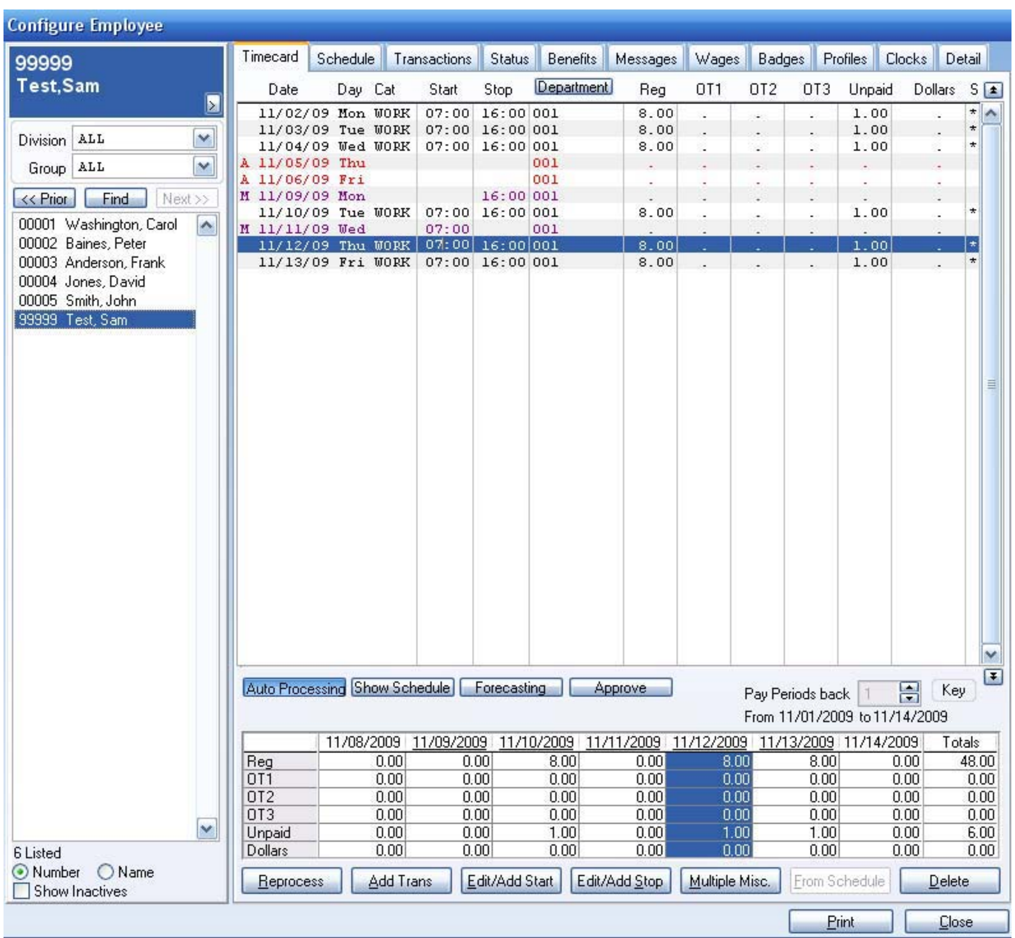
Genesis Pro uses Transactions to show the times and events of an employee record. When an employee uses the Time Clock to “Clock In” and “Clock Out”, they create transactions. Miscellaneous hours like Vacation and Sick time are also transactions.

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

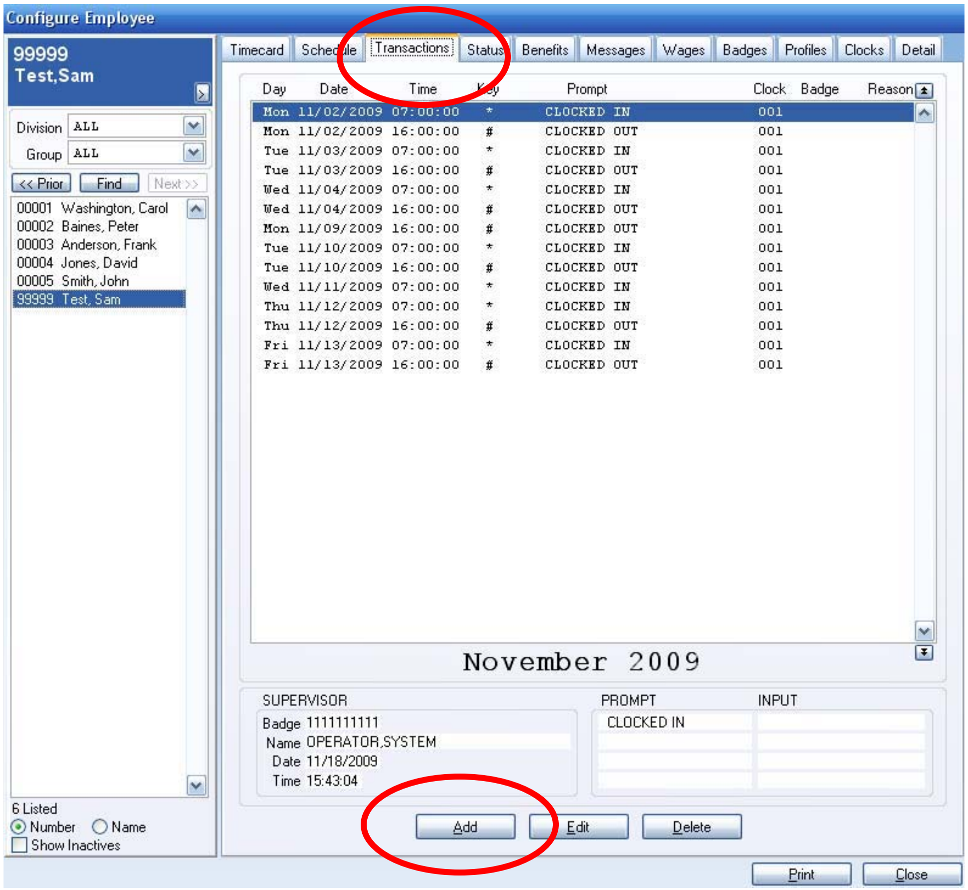




2. Select the Employee from the dropdown list; you will be taken to their *Timecard*.

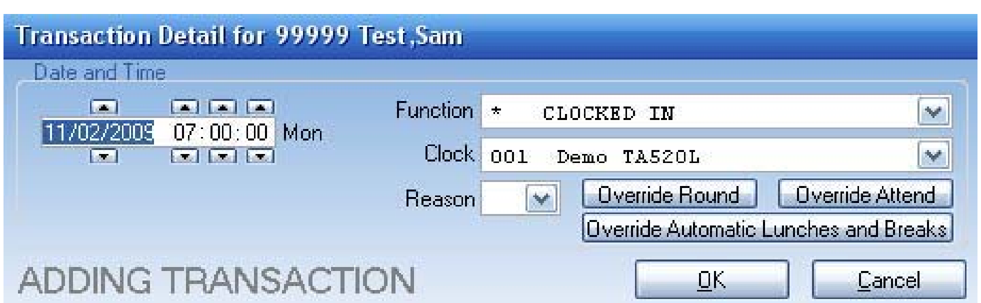


3. Click on the *Transactions* Tab to be taken to the *Transactions* window.

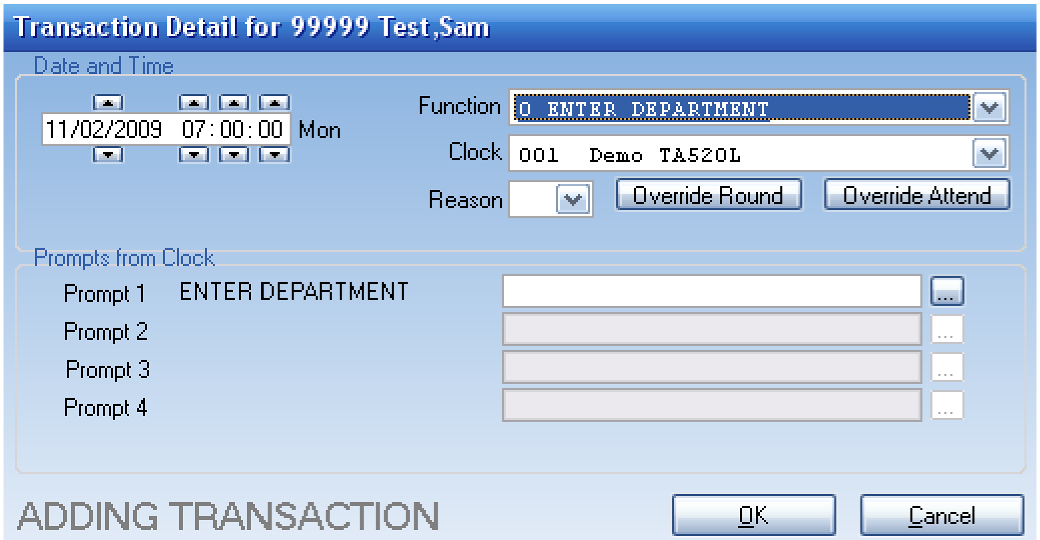


4. Click the **Add** button to open the *Transaction Details* screen.

5. 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.



6. 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.



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

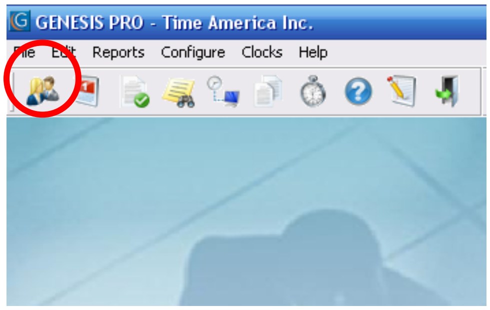
NOTES

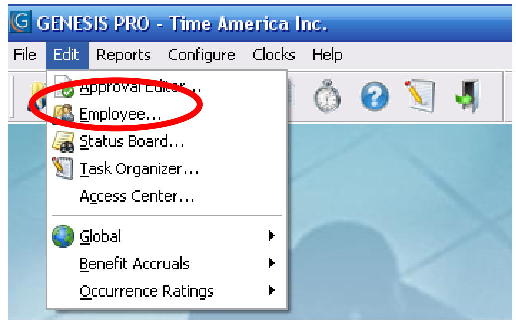
EDITING EXISTING TRANSACTIONS USING THE ONLINE TIMECARD

Editing Existing Transactions in the Online Time Card

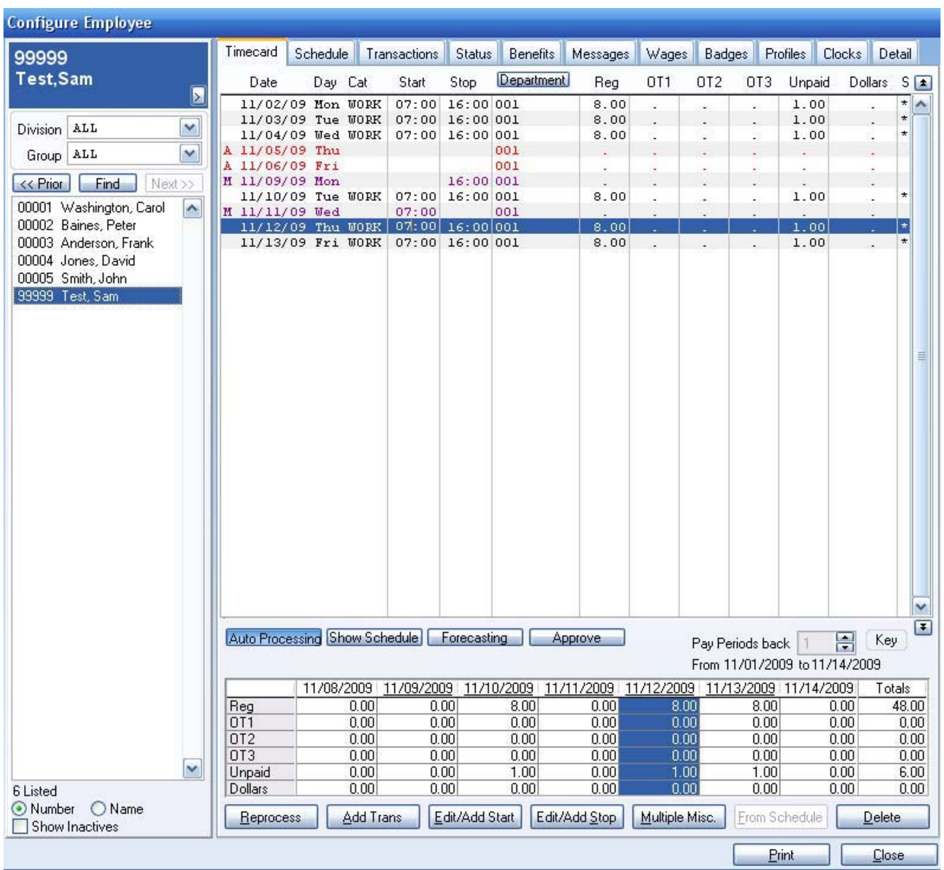
Editing transactions using the Online Time Card is an easy way to correct and update employee record, and see the results instantly.

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

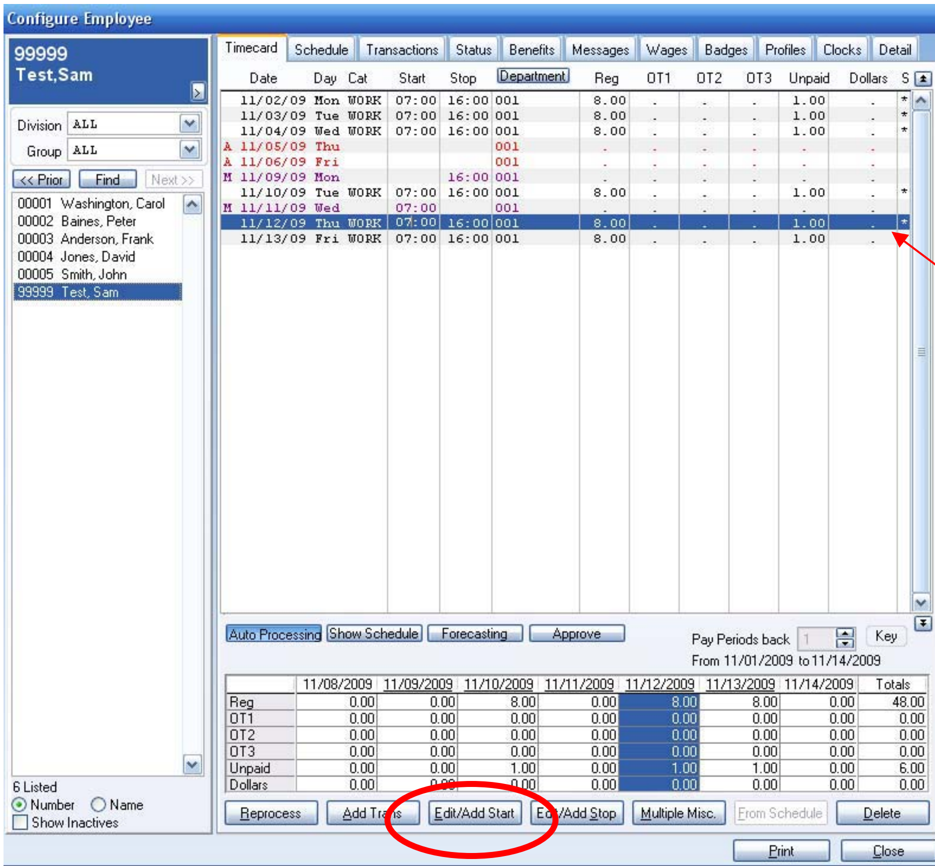




2. Select the Employee from the dropdown list to view their Timecard.

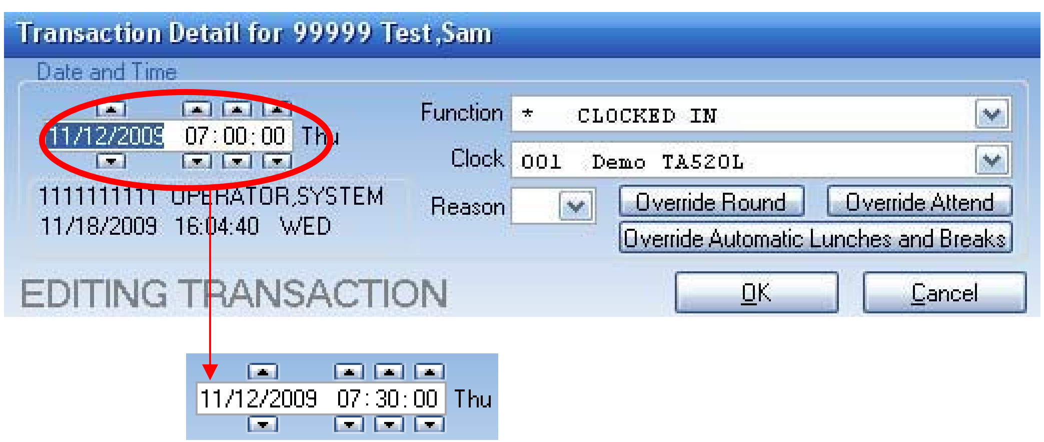


3. Using the Online *Timecard* we can modify an existing transaction. For our example we will change Thursday start time from “07:00:00” to “07:30:00”. Select the first line for Thursday and click the **Edit/Add Start** button.



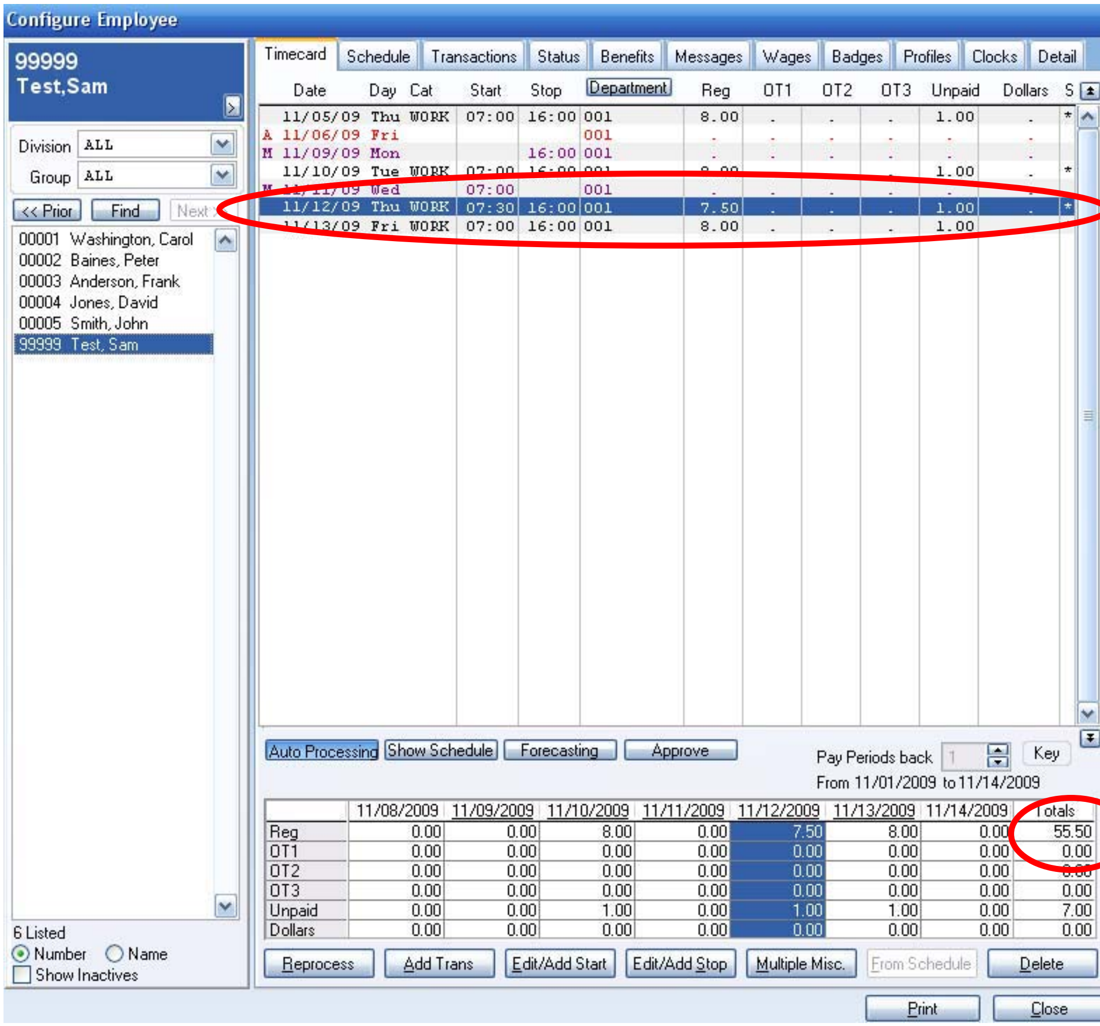
4. This will open the *Transaction Details* screen with a copy of the transaction selected. We want to change the start time for this transaction.

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



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

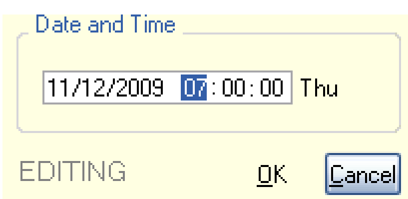
7. Click **Reprocess** button to see the changes to the employee's totals.



8. 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.



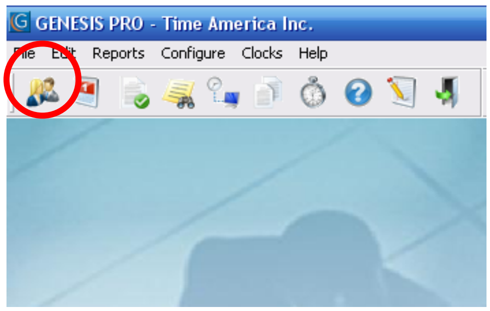
NOTES

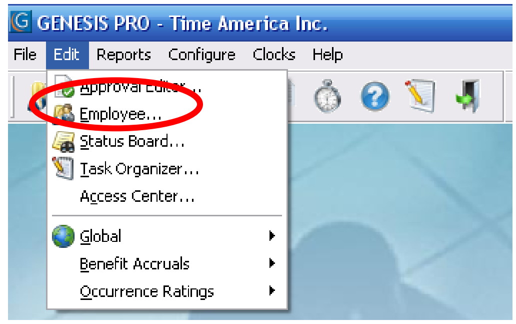
FIXING MISSING PUNCHES IN THE EMPLOYEE'S TIME CARD

Fixing Missing Punches in the Employee's Time Card

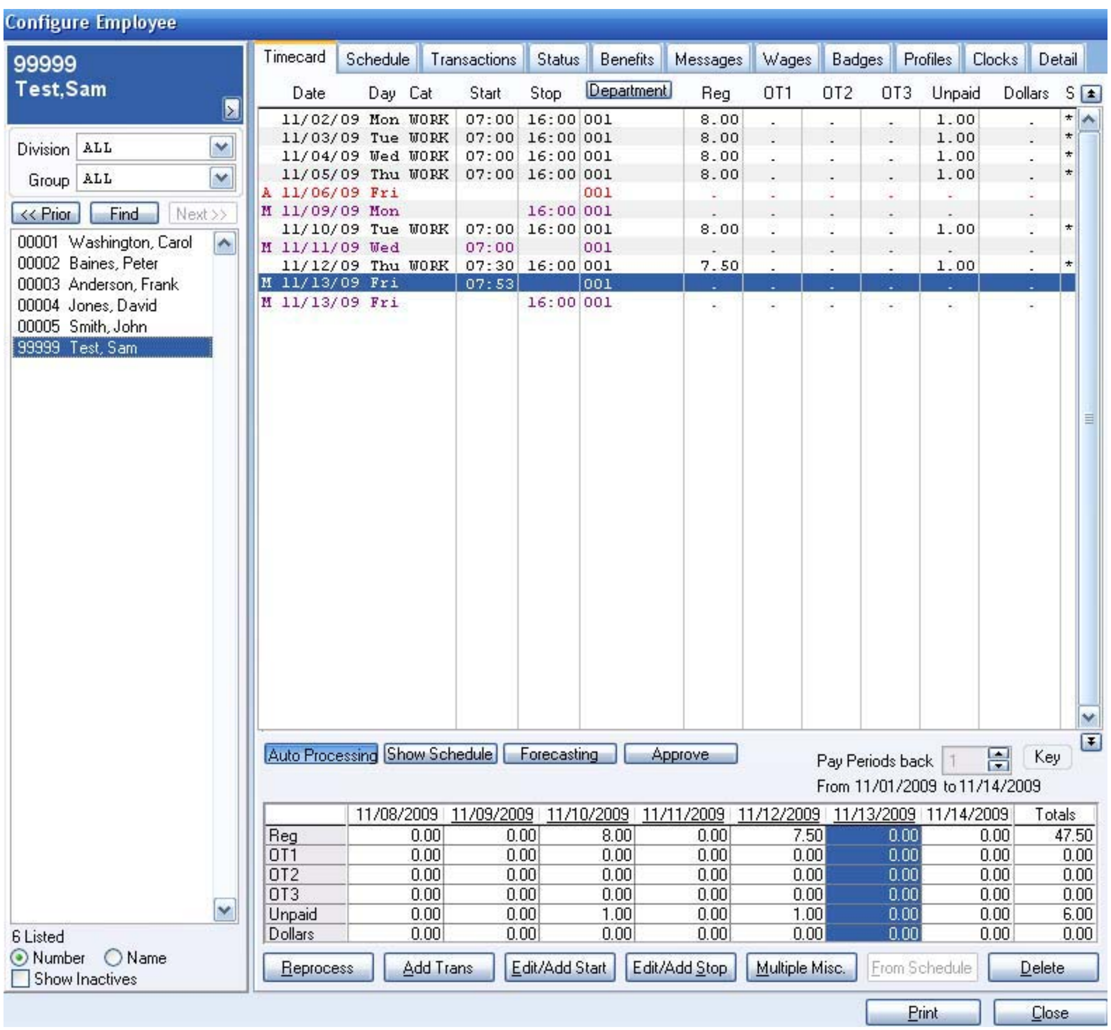
Editing transactions using the Online Time Card is an easy way to correct and update employee record, and see the results instantly.

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

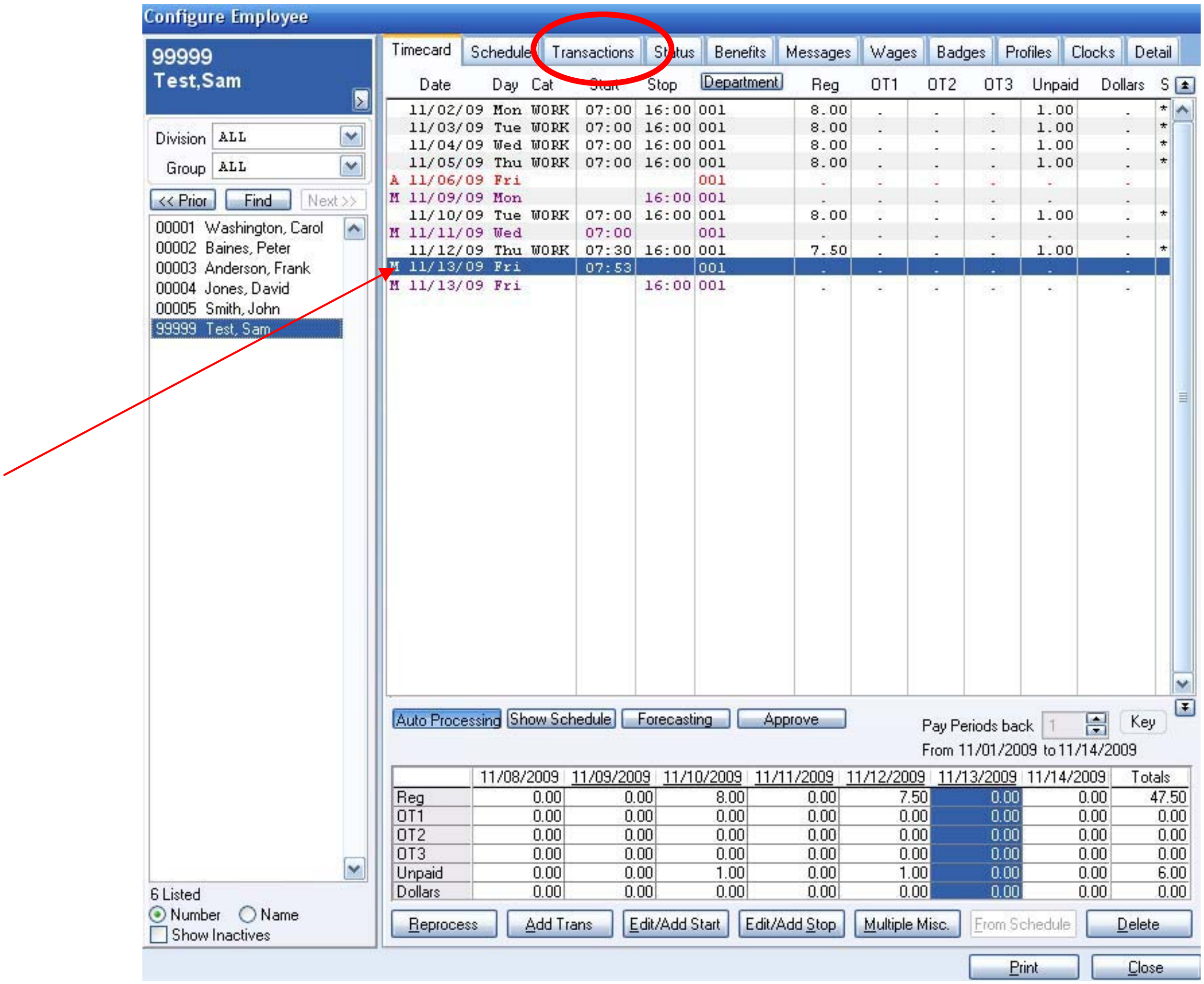




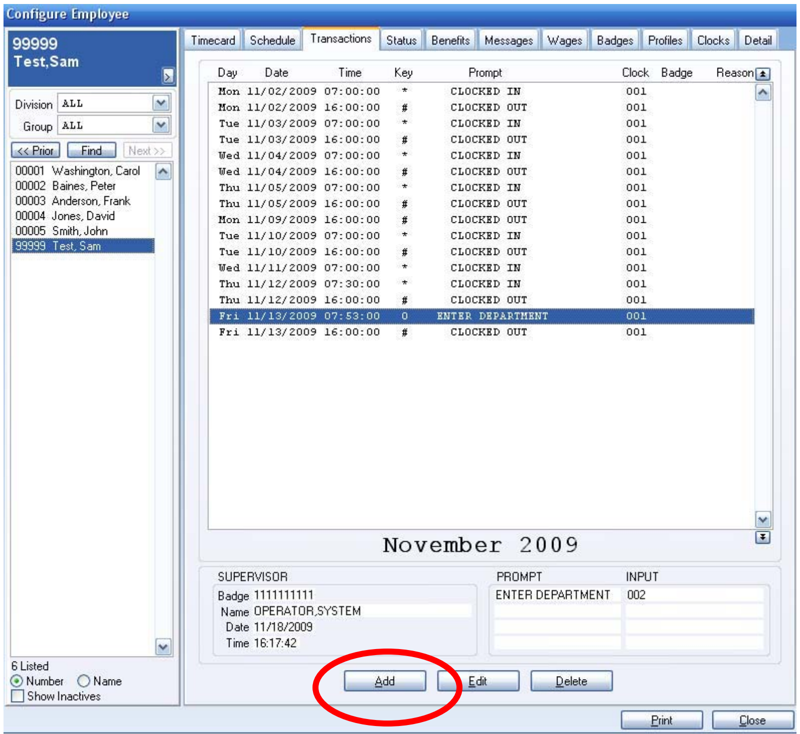
2. Select the Employee from the dropdown list to view their *Timecard*.



3. 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.



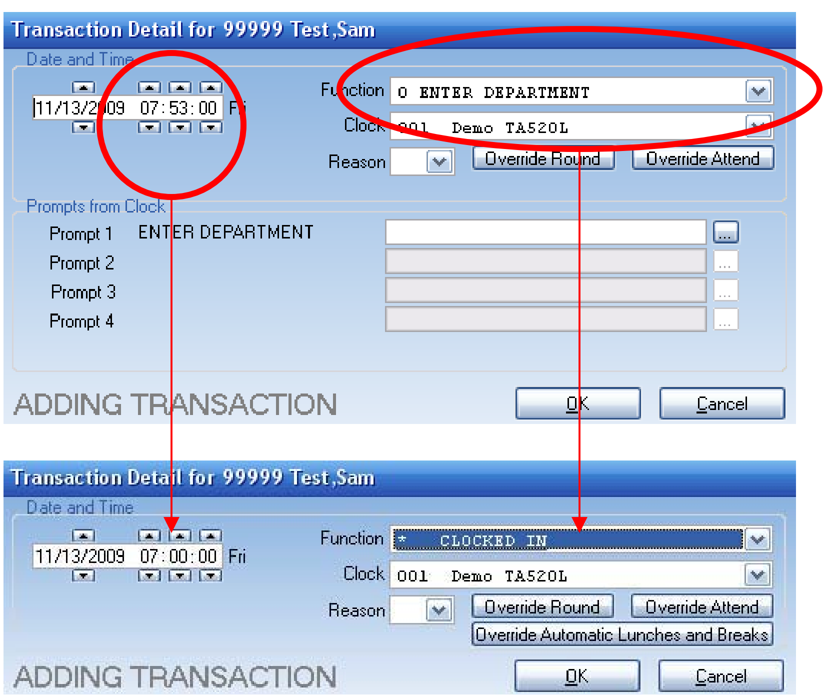
4. This will move us to the *Transactions* Tab. Looking at the sequence; we can see the employee forgot to create a "**CLOCK IN"** punch before they transferred departments. Because the department transfer was almost an hour later than their scheduled start time, we will create a "**CLOCK IN**" transaction.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



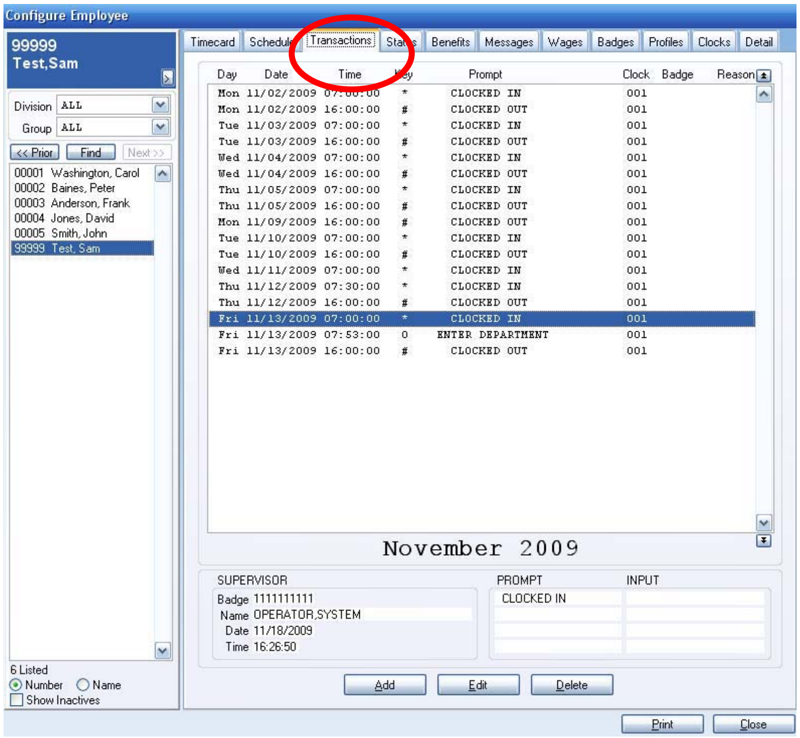
5. Click the **Add** button to create a new transaction.

6. 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.

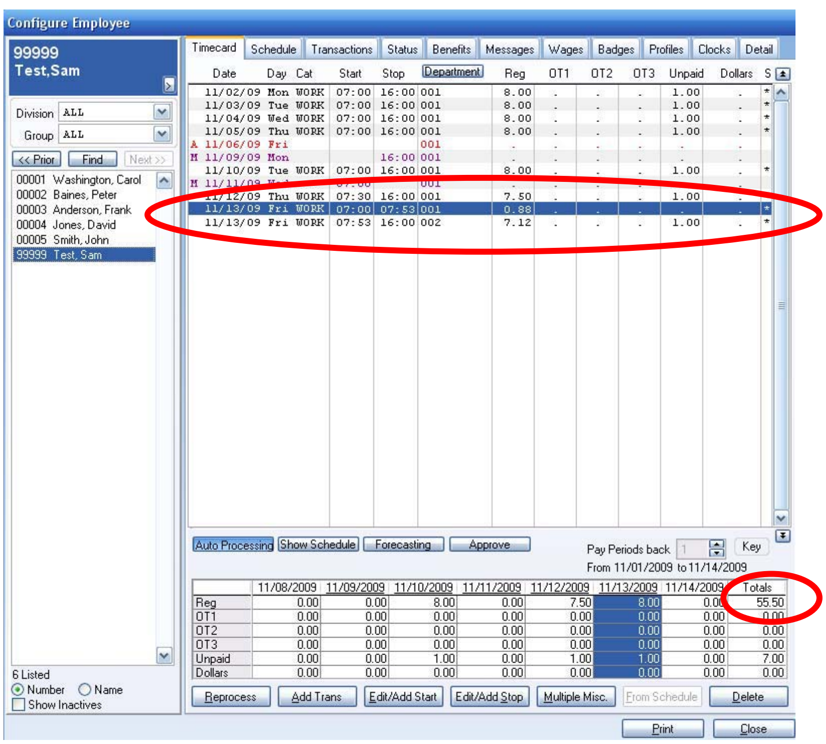
7. Modify the Time from “07:53:00” to “07:00:00” and Change the Function to “**CLOCKED IN**”.



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



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



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

NOTES

USING THE APPROVAL EDITOR

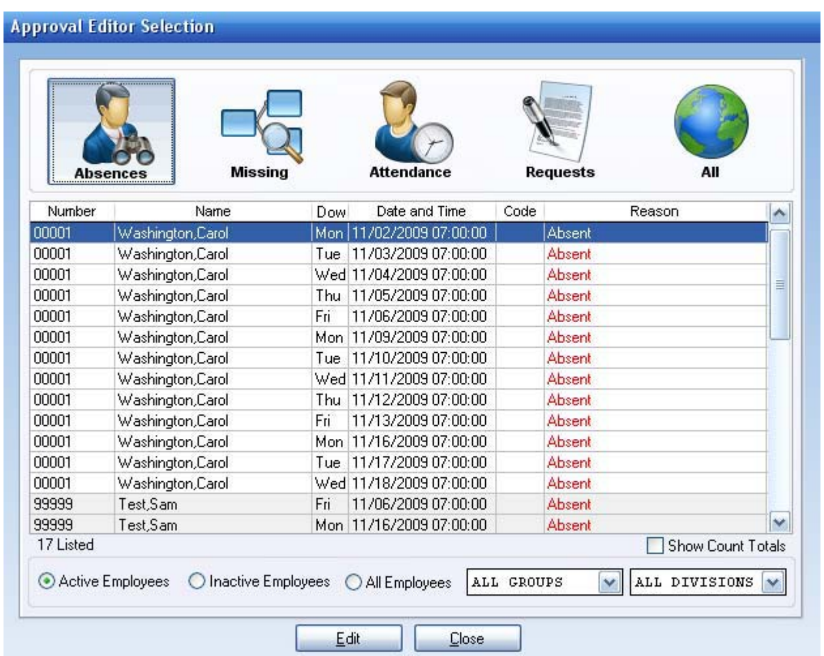
Using the Approval Editor

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.**

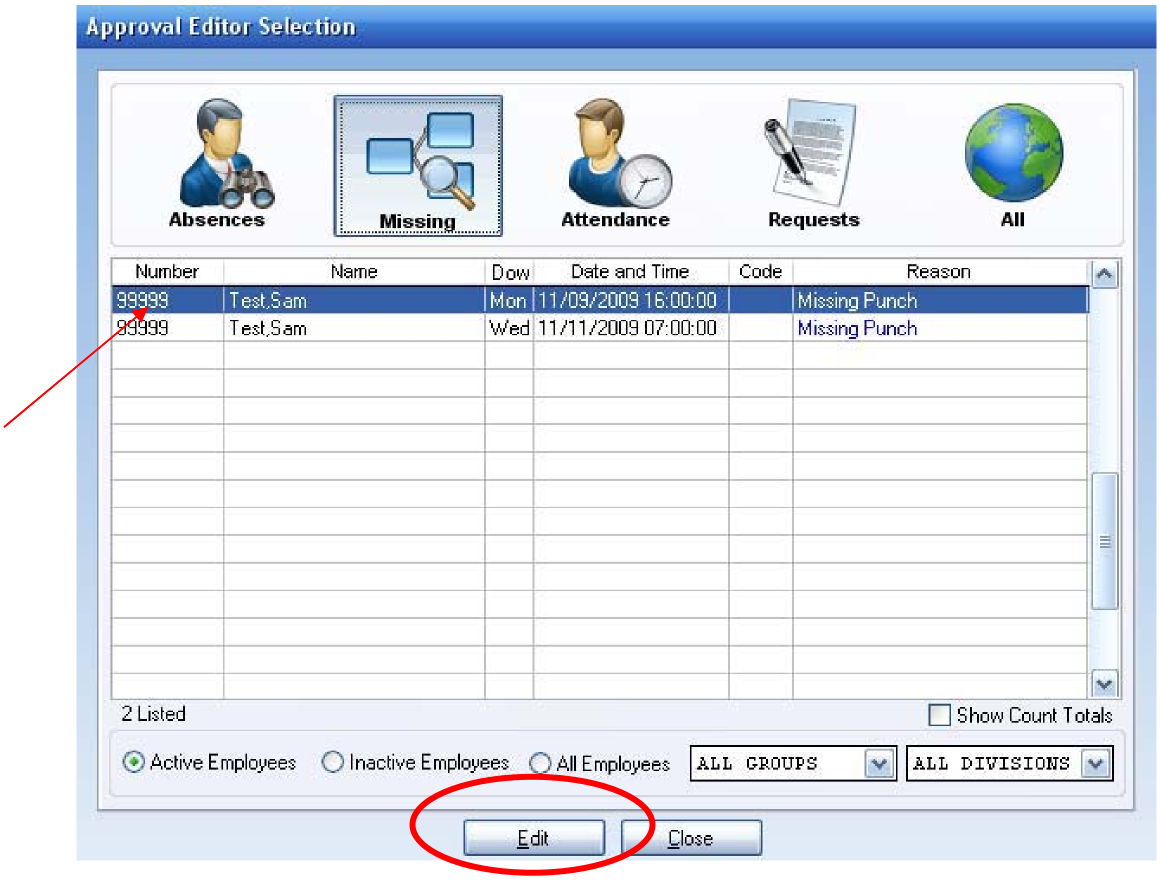
2. This will open the *Approval Editor Selection* screen. From this screen you can view all employee infractions based on the options you select. Absences, Missing Punches and Attendance Infractions can be displayed.

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 Cod*es). 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**.



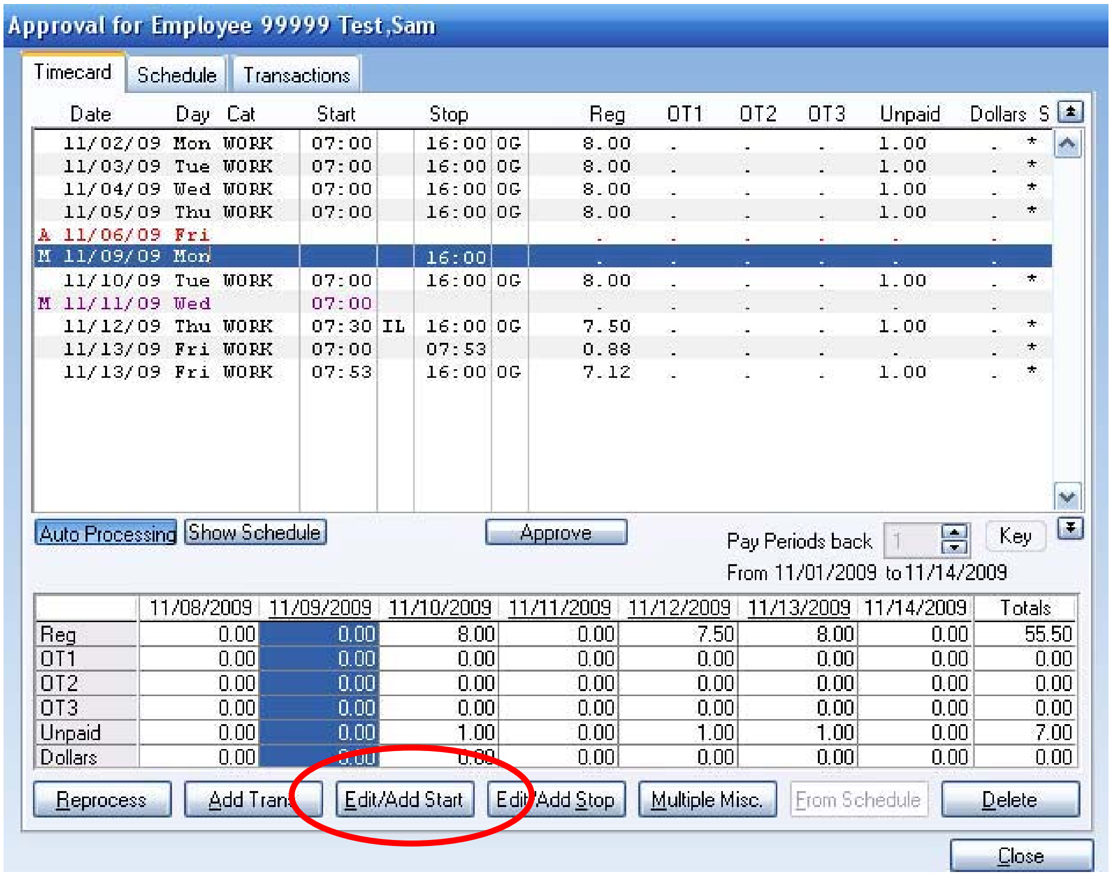
4. Select the **Missing** option to view only Missing Punches. This will make finding *Missing Punches and Other Exceptions* easier.

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.



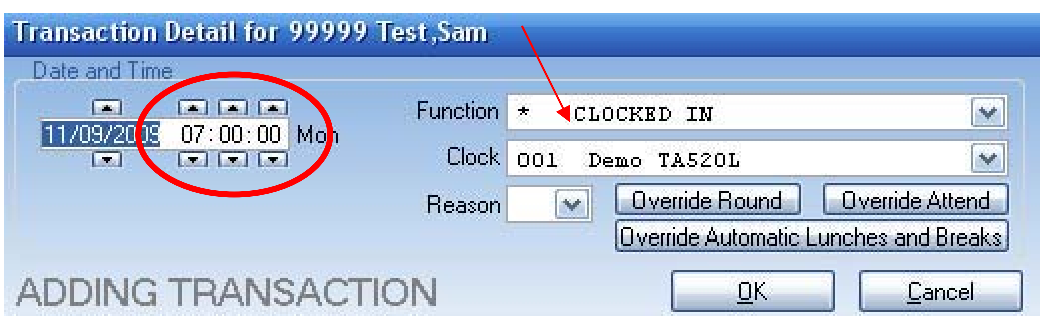
6. This will open a special *Online Timecard* for the employee.

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.



8. Select the line for Monday and click the **Edit/Add Start** button. This will open the *Transaction Detail* screen.

9. 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".



10. 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.

11. After correcting any other errors in the employee's time card click **Close** to return to the Approval Editor.

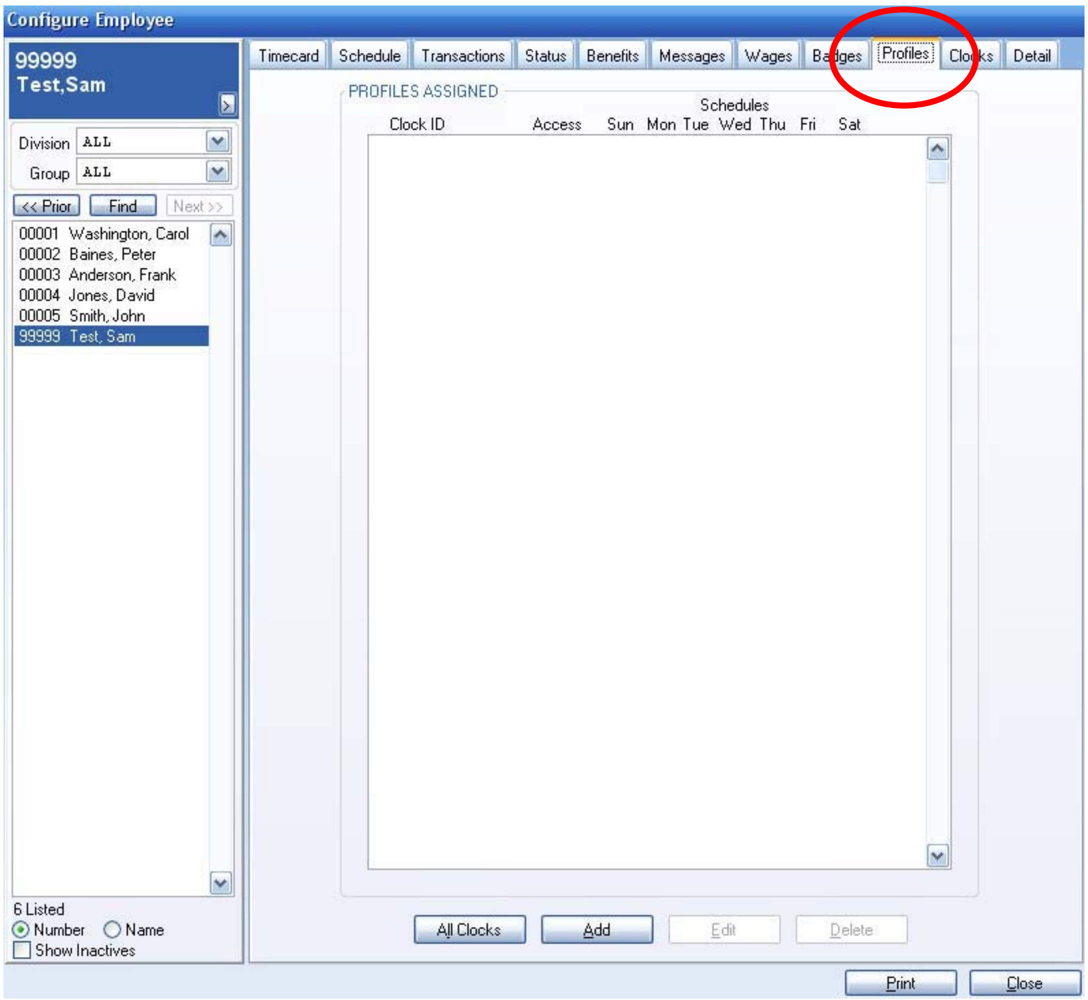
NOTES

ADDING EMPLOYEES TO THE TIMECLOCK FOR PROFILE LOCKOUTS

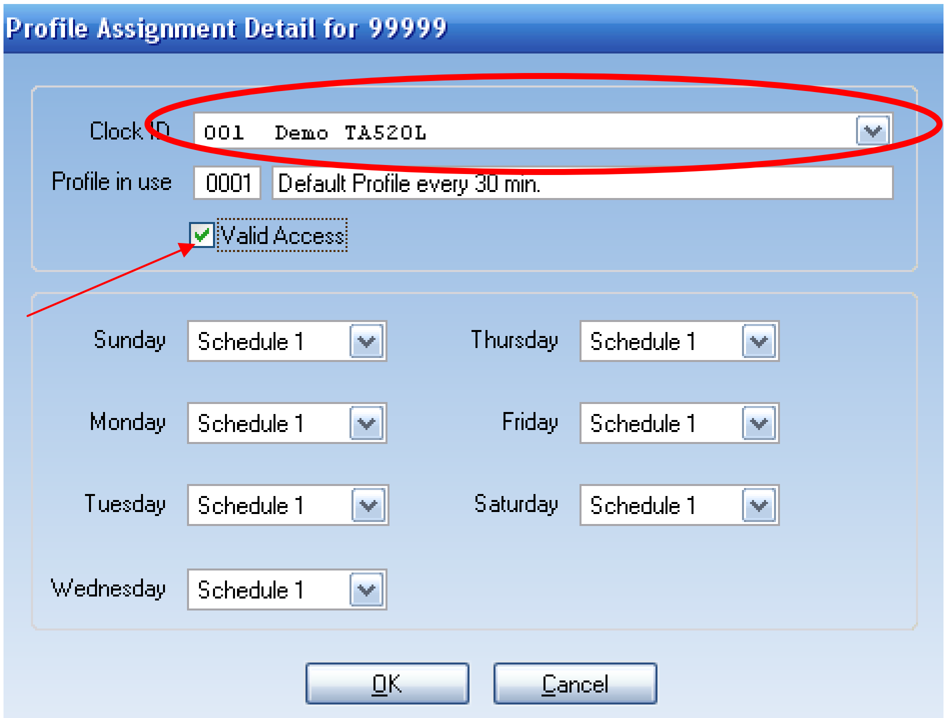
Adding an Employee to the Time Clock for Profile Lockouts

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.



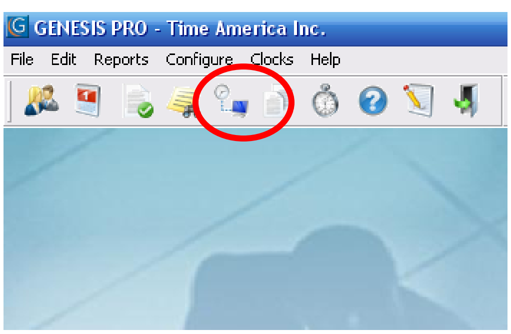
2. In the *Profile Assignment* screen click the **Add** button. This will open the *Profile Assignment Details* screen to configure the profile for the employee.

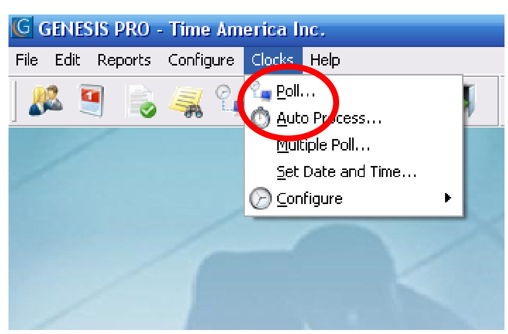


3. From this screen, you can select Clocks that have profiles in use. Since *Demo TA520L* is the only clock that is using Profiles, select it. The **Profiles in use** shows the name of the Profile that the clock is assigned. Make sure that **Valid Access** is selected.

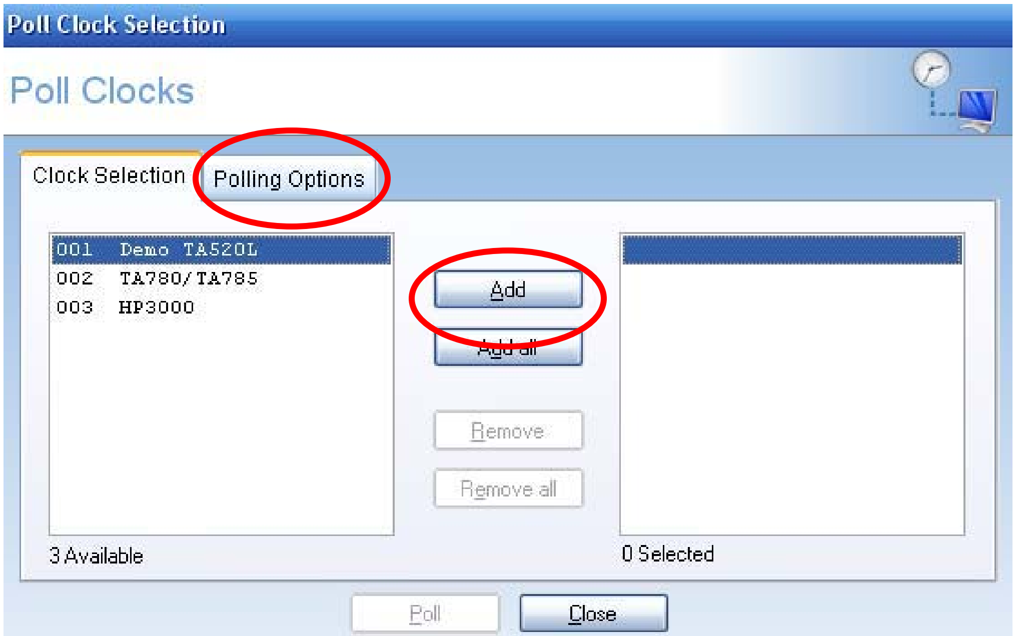
4. Each day can be configured to use different *Profile Schedules*. This is useful for employees that work different hours each day. Select the *Profile Schedule* that matches the Employee Hours Schedule. Once each day is configured, click **OK**.

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**.

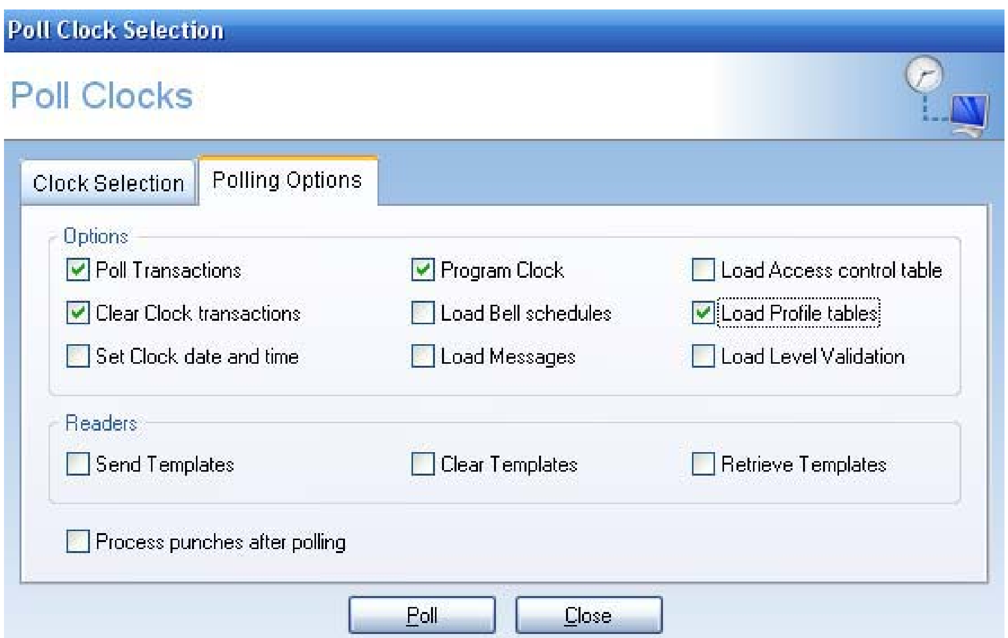




6. Select the time clock and click the **Add** button, this will move the time clock from the left window to the right window. After moving the time clock, select the *Polling Options* tab.



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.

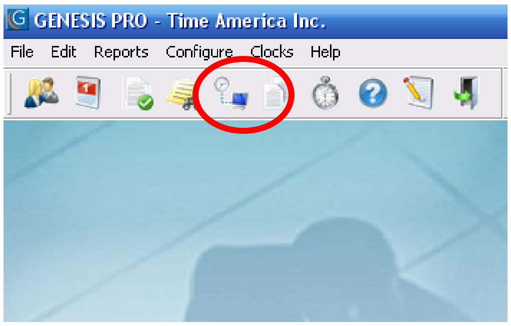
NOTES

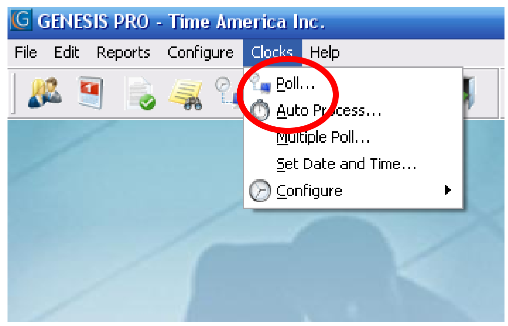
MANUALLY POLLING THE TIME CLOCKS

Manually Polling the Time Clocks

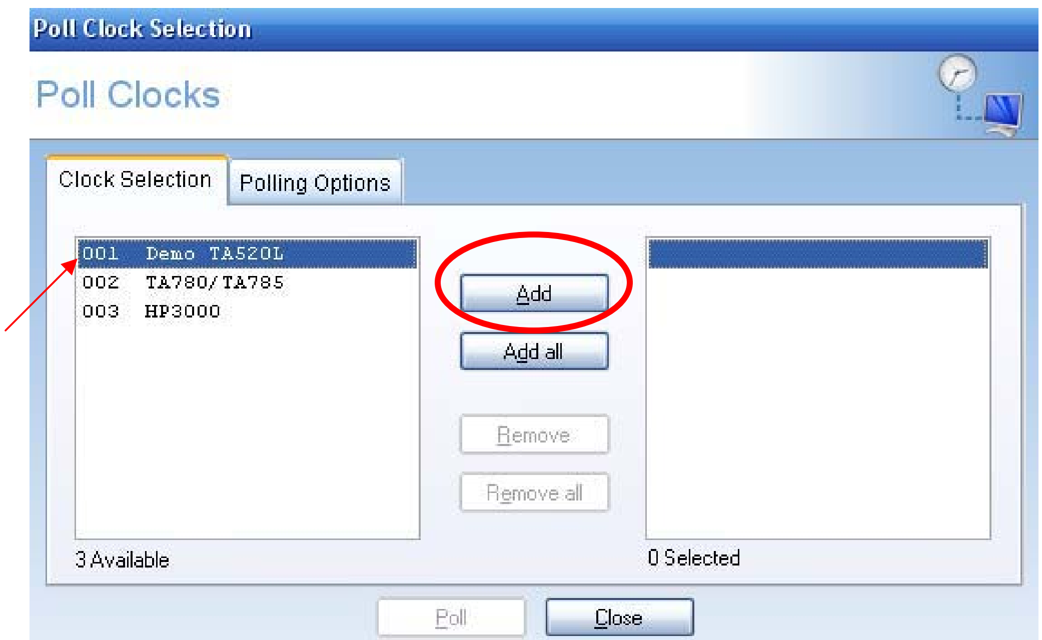
Genesis Pro allows the system user to retrieve and update the employees Time Card by manually polling each terminal. Before you can poll a terminal you do need a polling key or a system key attached to the parallel port or USB of your computer.

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





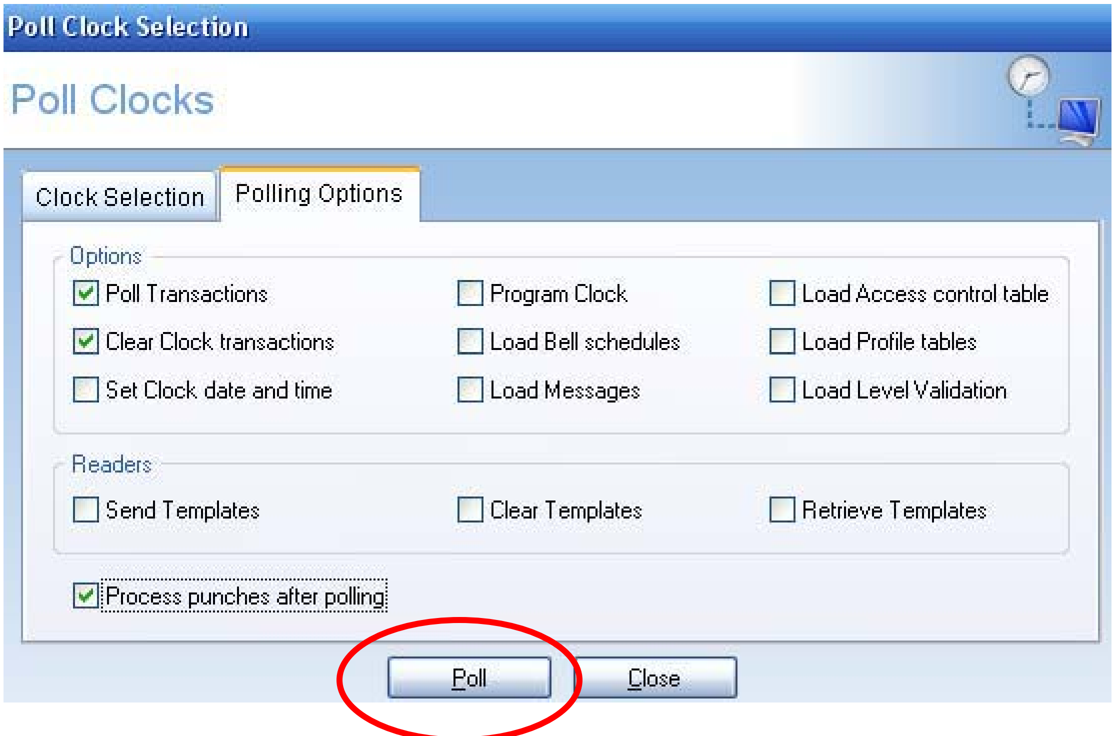
2. This will open the *Poll Clock Selection* Screen.



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

GENESIS PRO

Quick Reference Guide

Visit Our Online Support Center For Frequently Asked Questions:

www.centraltimeclock.com/support