Hover over screenshots for a closer look.

My Dashboard

When you first log into TimeClock Manager , the **Dashboard** area will appear with **widgets** that will provide you with quick access to information, such as pending time off requests, employee birthdays and anniversaries, or employees that are approaching overtime or have had a recent clock exception.

If your needs or preferences are different than the provided widgets, you can build your own widget configurations for users via the Dashboard Templates (Users) utility (**Configuration > Users > Dashboard Templates**).

Widget Types
Setting Up Widgets On My Dashboard

Sales: (800) 749-8463 | **Support:** (325) 223-9300
For more help, please visit our Support site.

Hover over screenshots for a closer look.

You are here: TimeClock Plus > TimeClock Manager > Hours > Group Hours

Group Hours

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

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

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

Sort Criteria:

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

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

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

Editing Segments

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

Approving Shifts

Approving Exceptions

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

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

Mass Approving Exceptions

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

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

Deleting Segments

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

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

Splitting Segments

Split Segment by Length

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

Split Segment by Percentage

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

Add Break

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

Toggle Breaks

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

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

Hover over screenshots for a closer look.

You are here: TimeClock Plus > TimeClock Manager > Filters > Exception Filter

Exception Filter

The **Exception Filter** allows you to filter segments in Group Hours and other features based on the exceptions flagged on those shifts. For example, if your organization required you to approve all overtime segments before closing the week or running payroll, you could filter all the segments worked that week to see just those segments that are in overtime so you could approve them all at once.

Exception Filter Criteria

Required for Close Week: This option filters to include segments that must be approved to close the week.

Required for Payroll Reports and Exports: This option filters to include segments that must be approved to run reports or export information.

Employee Approval: This option filters to include segments that require **Employee** approval.

Manager Approval: This option filters to include segments that require Manager approval.

Other Approval: This option filters to include segments that require Other approval.

Conflicting Shifts: This option filters to include segments where the employee has segments that are conflicting with one another.

Short/Long Break: These options filter to include segments where the employee has taken a short or long break, as defined in their Exceptions tab.

Long Shift: This option filters to include segments where the employee has worked a long shift, as defined in their Exceptions tab.

Long Week: This option filters to include segments where the employee has worked a long week, as defined in their Exceptions tab.

Missed Punches: This option filters to include segments containing missed punches.

Overtime: This option filters to include segments in which the employee is working in overtime, as determined by the settings in that employee's **Overtime** tab.

Absent segment: This option filters to include segments where the employee is flagged as absent.

Tardy 1: This option filters to include segments where the employee is flagged as **Tardy** 1.

Tardy 2: This option filters to include segments where the employee is flagged as Tardy 2.

Early/Late In/Out: These options filter to include segments in which the employee has exceeded their schedule variance threshold, as defined in the employee's Exceptions tab.

Creating an Exception Filter

1. In **Group Hours**, click on the **Exception Filter** button.
2. Select the exceptions you would like to view. For example, you could select **Overtime** as well as **Required for Close Week** to view all segments in overtime as well as anything else required to close the week.
3. Click **Filter** to return back to **Group Hours** with only the segments that meet the selected criteria visible.
4. To remove criteria, reopen the **Exception Filter** and click on **Disable**.

You are here: TimeClock Plus > TimeClock Manager > Reports > MSTPeriod Reports

Reports

The **Period Reports** feature allows users to create, customize, print, and save reports on employee hours across a given period. These reports can be customized to show information on selected employees and can be printed as well as downloaded in **HTML**, **PDF**, or **OpenXML** formats.

When you enter the **Period Reports** screen, you will see a number of options. You can select the report you would like to run from the left. Once you have selected a report, you'll see a number of options on the right. There are also several options at the top of the screen:

Payroll

Complete Payroll: This report displays each shift worked for each employee, including the hours worked and the total hours worked that day and week. This report is ideal for situations where you need all the information on a period on hand for an audit or payroll purposes.

Payroll Summary: This report simply shows the total regular and overtime hours worked for each employee. This report is ideal for when the totals for your entire company must be available in one place.

Miscellaneous

Punch Location Report: This report provides a complete list of clock operations throughout the reporting period as well as where they were made and what method (RDT, WebClock, etc.) was used.

Configuring a Report

1. Select the report you would like to run from the **Period Reports** screen.
2. Apply the desired **Employee** and **Job Code Filters** by clicking the buttons at the top of the screen.
3. Enter in the date range for the report or select a predefined date range from the dropdown.
4. Click on **Settings** to change individual facets of the report. These settings are unique to each report, so for example if you want to remove employee social security numbers from the **Period Report (Summary)**, you would uncheck "**Print social security number at top of page**" in the **Settings** menu.
5. If you would like to change the font, spacing, or page orientation used on the report, click on **Page Layout** at the bottom of **Settings**.
6. Once you have customized the report, click **Save** to commit these changes and return to the **Period Reports** screen.
7. Click on the **Download** button to change the output the report uses. The types of output **TimeClock Plus®** produces are:

- **HTML**: The output is produced in a .html file that can be opened by a web browser.
- **PDF**: The output is produced in a .pdf file that can be opened in Adobe Reader or another program designed to read .pdf files. As the .pdf report is more difficult to edit than the other formats, many companies use this for producing reports to send out.
- **OpenXML**: The report is produced in a .xml file that can be opened in Microsoft Excel or OpenOffice Calc.

8. Click **Preview** to see an example report and make sure that it includes all of your criteria.
9. Once you have configured the report, click on your output type (e.g., **HTML**) to create a downloadable report. If you wish to print a hard copy, click **Print** to send the report to a printer.

Saving a Report

Reports can be saved for later use. To save and access reports:

1. Select the report that you would like to save and configure the settings as you normally would.
2. Click on the **Save as** button.
3. On the **Saved Report** menu, select a **Category** you would like to save this report under. Similar reports can be grouped in the same category for easy access. Give the report a unique name.
4. If you would like to allow other users to access this saved report, check **Make report visible to all users.**
5. To create an employee filter that will consistently be used on the saved report, check **Save employee filter** and create the filter.
6. To create an employee filter that will consistently be used on the saved report, check **Save job code filter** and create the filter.
7. Click **Save** to add the report to **Saved Reports**.
8. To create a unique set of options the report, check **Save options** and configure the report.
9. Click **Save** to add the report to **Saved Reports**.
10. To run this report later, select **Saved Reports** under the **Reports** menu.

Hover over screenshots for a closer look.

You are here: TimeClock Plus > TimeClock Manager > Tools > Employee Status

Employee Status

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

After entering **Employee Status**, you will see a list of your first 100 employees. The top bar will show the number of employees clocked in, clocked out, on break, and on leave. There are also several buttons you can use to filter and edit the **Employee Status** information:

Refresh: This button updates the employee information.

Employee Filter: This button allows you to filter your employees. For more information, see Employee Filter.

Job Code Filter: This button filters clocked in employees by their current job code. For more information, see Filter Job Code.

Options: This button allows you to change a number of settings for **Employee Status**. For more Information, see Employee Status Options.

Print: This button allows you to print the currently selected tab.

Employee Status Tabs

To sort employees on any tab of the **Employee Status** list, click on the column header. To manage individual employees, right click on a name or select **Segment**.

TIP: Multiple employees can be managed at once in Employee Status. To do so, hold down the Control key and click on the employees you would like to edit, then perform the desired action using Segment.

Clocking Employees In from Employee Status

1. Select the employee(s) you wish to clock In from the **Employee Status** list.
2. Right click on the employee(s) or click on **Segment**, then select **Clock In**.

3. In the **Clock In** window, enter the date and time you want the segment to start on, as well as any applicable job code, **cost code** , and tracked field information.
4. Click on **Clock In.**

Clocking Employees Out from Employee Status

1. Select the employee(s) you wish to clock out from the **Employee Status** list.
2. Right click on the employee(s) or click on **Segment**, then select **Clock Out**.

3. In the **Clock Out** window, enter the date and time you want the segment to end on, as well as any applicable tracked field information.
4. Click on **Clock out.**

Changing an Employee Job Code
Creating a Call Note

Call Notes allow you to place a brief note next to an individual's status In Employee Status. This can be used to show why an employee is not present, or whether or not that employee has been called to pick up a shift. To create a call note:

1. Select the employee in **Employee Status.**
2. Click in the **Call Note** column for that employee.

3. Enter a brief note for the individual, as well as an expiration date and time.
4. Click **Save** to add the note for this individual. This note will display next to the employee's information until the expiration time is reached.

Managing an Employee's Hours

1. Click on an employee from the **Employee Status** list. This should highlight the employee.
2. Right click on the employee and select **Individual Hours**. This will take you to the Individual Hours window for this employee.

Viewing an Employee's Shift Information

Hover over screenshots for a closer look.

You are here: TimeClock Plus > TimeClock Manager > Tools > Audit Log

Audit Log

The **Audit Log** allows you to examine when changes have been made to certain areas in **TimeClock Plus®**.

Certain functions are available within the Audit Log:

- **Hours Audit Log:** This shows changes to employees' hours.
- **Incomplete Clock Operation Audit Log:** This shows situations where employees have not completed a clock operation.

To access the desired function, choose the function from the **Select feature** dropdown.

NOTE: Any audit information is permanent and cannot be edited or removed by administrators, users, or employees.

Hours Audit Log

The **Hours Audit Log** allows users to view and search for edits made to employee segments. While many operations performed within **TimeClock Plus** will be performed by the employees themselves and will not require user oversight, the **Hours Audit Log** provides a permanent record of segments that were added, edited, or deleted by users, as well as information on where, when, and by whom these changes were made.

Navigating the Hours Audit Log

Group by: This dropdown determines how hours will be sorted within the Hours Audit Log. Sorting can be done by:

- **Date edited**
- **Date worked**
- **Department**
- **Employee ID**
- **Employee name**
- **Physical location**
- **User**

Search on dates edited: Selecting this radio button searches for segments edited within that date range. For example, if yo were to search for segments edited in the month of October 2015, all segments that were edited during that time frame wo appear, regardless of when the **segment** took place.

Search on segment times: Selecting this radio button searches for segments whose times fall within that date range. For example, if you were to search for segments in the month of November 2015, all edited segments that took place during th month that would appear, regardless of when they were edited.

Date Range: The date range boxes allow you to select a date range for the edited hours you would like to see. In addition, several common date ranges (such as month to date, open weeks, or pay period) can be selected from the dropdown menu

Update: Once a date range and other criteria have been defined, clicking on the **Update** button allows you to view relevant segments.

Hours Audit Log Filters

Employee Filter: The Employee Filter allows you to filter employee segments by a number of criteria, such as hire date, employee number, or length of employment.

Job Code Filter: The Filter Job Code allows you to filter employee segments by the **job code** (s) the employees worked i

User Filter: This filter allows you to select the user or users whose edits you wish to view.

Advanced Filter: This filter is comprised of several smaller filters:

- **Edit Filter** : Enabled by checking **Include changes to segments,** the **Edit Filter** allows you to filter employee segmen by the type of edit (adding, editing, or deleting).
- **Approval Filter** : Enabled by checking **Include approvals,** the **Approval Filter** allows you to filter employee segment by exception type, override method, or triggering (type) of operation.
- **Location Filter** : Enabled by selecting the **Include specific features** radio button, the **Location Filter** allows you to fil by where the segments were added or edited.

TIP: The Edit and Approval Filters can be fine-tuned by clicking on the various option icons next to their check boxes.

Performing an Hours Audit

1. At the top of the window, select the date range desired for the hour audit. If necessary, select how segments will be grouped and the criteria for the date range.
2. If desired, filter the audit by selecting the valid filter. Segments can be filtered by employee or job code as well as typ of edit or exception type.
3. Once you've configured your audit, click the gray **Update** button.
4. A list of all relevant segments will appear below the information bar. Segment groups can be expanded or collapsed clicking on the + icon next to the group.
5. If the employee you are looking for doesn't appear on this list, type in their name or **Employee ID** into the **Search** bar and click on the magnifying glass icon.
6. Each edited segment has a icon to the right. Click on this icon to open up the **Hours Audit Log History**. This wind will show the time, location, user, and values for each version of the segment.

7. Each individual edit can be selected from the list on the left of the **Hours Audit Log History**. Additionally, edits can b browsed by clicking the up and down arrows.
8. Each edit will display the old and new values for each applicable field. If nothing was changed for a field, a single valı will appear across both fields.

Incomplete Clock Operation Audit Log

If your employees fail to complete a clock operation, then the failed operation will appear in the **Incomplete Clock Operation Audit Log.**

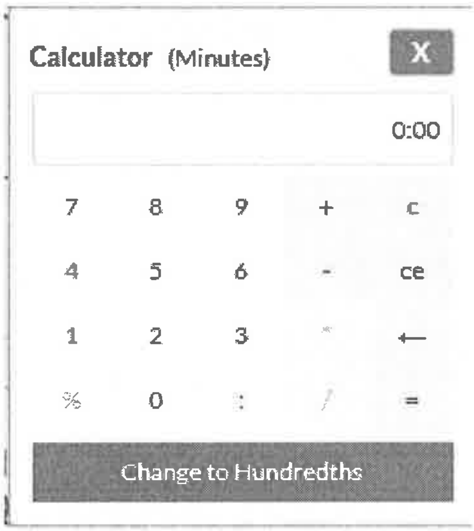
Viewing Incomplete Clock Operations

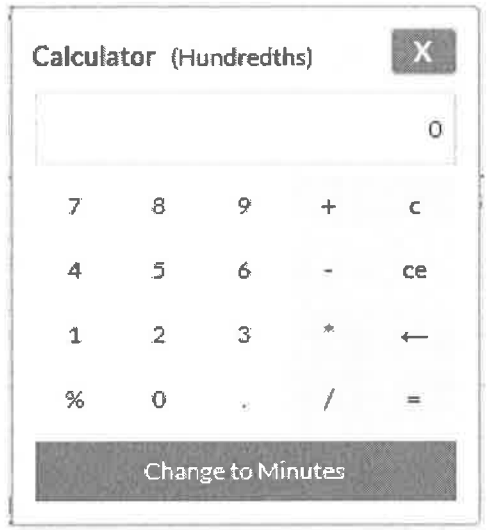
1. Select **Incomplete Clock Operation Audit Log** from the **Select feature** dropdown.
2. If you would like to only see certain employees, you can use the Employee Filter.
3. If you would only like to view punches from a particular application (e.g. just unresolved punches from **WebClock** check the desired application(s) from the **Advanced Filter** button:
   - **Mobile**: This will display incomplete Mobile App operations.
   - **TelClock**: This will display operations that were not completed on TelClock.
   - **Clock Hub**: This will display operations that were not completed on a clock device.
   - **WebClock**: This will display incomplete WebClock operations.
4. Enter a **Date Range** you would like to see incomplete clock operations for, or select one from the **Date Picker**, then c **Update.**
5. Click on the + to expand an employee, or click **Expand** or **Collapse All** to show or hide each section. When you have finished making changes to the tab, click **Save** to save your work or **Cancel** to go back to the previous settings.

Calculator

Tools > Other Tools > Calculator

Allows the user to change time from minutes to hundredths or vice versa.





Search

Contents

Hover over screenshots for a closer look.

You are here: TimeClock Plus > TimeClock Manager > Messaging Center

Messaging Center

The **Messaging Center** is a feature that allows users to send out messages to individual employees or the entire company. These messages can serve as reminders, and can be displayed for a set amount of time.

Messages can be sent out via email and SMS text message, and also as an internal message that employees can view when performing clock operations.

Sending a Company Wide Bulletin

Sending an Individual Message

1. Click the gray envelope button in the upper right hand corner from anywhere in **Manager** to open the **Messaging Center.**
2. Click the **Compose Message** at the bottom of the Messaging Center.
3. Select **Individual message.**
4. Select the employee or employees you would like to send messages to by clicking on **Select recipients.** Here you can select the employees you would like to send a message to by selecting them from a list or creating a filter.
5. Type out your message in the text box and click **Send** to send the message to the selected recipients.
6. Check **Send with TimeClock Plus messaging** if you would like to send this via the TimeClock Plus internal messaging system. This allows you access to additional options:
   - If you would like the message to display over a certain time frame, check **Message starts** and/or **Message expires,** and select the date and time you would like the message to start and stop displaying.
   - If you would like the selected employee(s) to be able to mark the message as read (preventing it from automatically displaying), check **Message can be marked as read.**
7. Check **Send email** and/or **Send SMS** message to send the message to your selected employee(s) via email and/or SMS.
8. Click **Send** to send the message to the selected employee(s).

Managing Company Bulletins

Managing Individual Messages

Sales: (800) 749-8463 | **Support:** (325) 223-9300
For more help, please visit our Support site.