EMPLOYEE TRACKER QUICK START GUIDE



Thank you for purchasing Advanced Tracker's *Employee Tracker*.

This *Employee Tracker* Quick Start guide will provide you with information regarding Installation, Daily Operation, Reporting and Maintenance of your software. The material is detailed in an easy to read format including graphics to get you started.

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Employee Tracker Installation

System Requirements

Before you install *Employee Tracker* please review the following system requirements:

Disk Space Requirement

The base system will occupy 53 MB of hard disk space. Also, *Employee Tracker* requires at least 200 MB of space per client PC for data and backups.

Memory Requirement

Windows 95 C	64 MB RAM
Windows 98	64 MB RAM
Windows ME	64 MB RAM
Windows NT	128 MB RAM
Windows 2000	256 MB RAM
Windows XP	256 MB RAM

Supported Windows Versions

Windows 95 C Windows 98 Windows ME Windows NT Windows 2000 Windows XP

Printer

Inkjet - Most standard products Laser - Most standard products

Video

SVGA 800x600 (small fonts)

Communications

COM 1, 2, 3 or 4

About the System

Before you begin, there are a few specific tools and shortcuts within *Employee Tracker* you should know about. A good understanding of these tools is essential to using *Employee Tracker*.

Employee Specification Buckets

Buckets are an essential tool you will need to learn about in order to correctly use *Employee Tracker*. These buckets are used to quickly pick a specific record or a range of records. **The purpose of the buckets is to select only the relevant records that you need to work with.** For example, if your company/ organization has 500 employees, it would not be practical to be working with all 500 employees every time you want to ADD/EDIT a record. It is much faster to go into the selection buckets and narrow down the group of employees you need to work with. For example, you may only want to work with one or two employees from one department and two shifts. Follow the procedure below to make your selections:

Click the file cabinet button is within the Employees window.

C Employee Tra)Employee Tracker Plus [Your Company] - Setup/Employees 📃 🗐 🗶					
Employees						
Add	Edit	<u>D</u> elete	Ren	umber		
<< Previous	<u>M</u> ext>>			E <u>x</u> it <<		

After you've clicked the file cabinet button, you will open the '**Employee Specification Buckets**' window as shown below:

	Er	nployee Specifica	tion Buckets	
_	Availabl	•	s	elected
Supervisor	Select All >>	• >>	<<	<< Remove All
Department	10000 VAREHOUSE	• >>	**	
	Select All >>			<< Remove All
Status	PT FUL THE	• >>		-
	Select All >>			<< Remove All
Shift	OMPT APTERSHOON SHOP	T • >>	<<	-
	Select All >>			<< Remove All
Employee			es	
	Select All >>	8 employees	0 employees	<< Remove All
Sort by 📀	Employee Code (Asc) 🛛 🤅 En	nployee Name (Asc) 🔿 Hi	e Date (Asc)	

As you can see in the diagram on the last page, you can select which employees you would like to add to your bucket by selecting criteria from **Department**, **Status** and/or **Shift**. They may or may not have a **Supervisor** depending on how you have setup the system.

Remember, the purpose of the buckets is to select only the relevant records that you need to work with. You may select which employees you would like to display and work with, by selecting specific criteria within *Supervisor*, *Department*, *Status* and *Shift* categories.

To Select or Remove Your Selections:

From each of the categories in the left column under the 'Available' heading,			
choose your criteria by using the I down arrow button of each category.			
Highlight the item you would like to choose and hit the >>> button to choose			
that selection, or use the Select All >> button to move all 'Available'			
records to the 'Selected' records column on the right side.			

To move or remove records from 'Selected' column back to 'Available', follow the

above directions and hit the source button for one record or the

<< Remove All button to remove all records.

Supervisor -- Not all employers use this option. However, some employers assign a Supervisor to a group of employees.

Department -- Employees must be assigned a department. Department examples include *Shipping*, *Maintenance*, etc.

Status -- In ETP, each employee is assigned a status, for example *Full Time, Hourly, Part-Time*, etc.

Shift -- The last step is choosing the shifts to be included in the specification. Shifts are assigned to each employee. Examples of shifts are *Days*, *Afternoon*, *Graveyard*, etc.

Date Range

Below is an example of a date field. To change the date, you can click on the Pop-Up Calendar icon (as explained below) or just change the date in the date field window. The format used is "mm/dd/yyyy".

Employee Tracker has a few shortcuts built in for you to use:

- Double-clicking in the date field will enter today's date.
- [Page Up] and [Page Down] keys will toggle between months.
- Up and Down arrow keys will toggle between days of the week.

Employee Tracker Plus [Your Company] - Statutory/Public Holidays		
Statutory/Public Holidays		
Holiday Date	03/20/2003	



In *Employee Tracker* when you are required to enter a date, you will come across the pop-up calendar button.

If you click on the calendar symbol, a calendar as shown below will pop up. Simply select the appropriate date with your mouse and click $[\underline{O}k]$. To move between months use the \blacksquare and the $\boxed{\bullet}$ buttons.

By double-clicking on a date, you will select the date and the pop-up window will close. The date you clicked on will have been selected. If you select the box labelled '**Quick Select**', when you single-click on a date the day will automatically be selected and the calendar will close. There's no need to click on [**Ok**].

Pick	Pick Date					
	Quick Select					
•	F	ebru	Jary	2003	:	►
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	20	28	1
2	3	4	5	6	7	8
0	Շ Today: 02/27/2003					
	<u>0</u> k			Ex	it <	<

Rolodex Search Button

Button

You will see the *Rolodex Search Button* throughout Employee Tracker. This allows you do a Quick Search for something specific. It could be an Employee, a Holiday, etc. It's a handy tool to use to search quickly.

As shown below, the *Rolodex Search Button* was clicked while in the *Employees* window and it activated the *Employee Quick Search* window.

Employee Quick Search			
ⓒ Employee <u>C</u> ode	ployee <u>N</u> ame		
Code	E <u>x</u> it <<		

<u>Key Usage</u>

Menus	[Down arrow] [Up arrow] [Page down] [Page up] [Esc] [Enter] [F1]	Move highlight bar downward to the next menu step Move highlight bar upward to the previous menu step Move menu to next page if the current page is full Move menu to the previous page (if there is one) Display previous screen or quit Initiate selected step Help text where available
Entry forms	[Tab]	Move to next field
	[Shift Tab]	Move to previous field
	[Enter] [Esc] [Alt F4]	Execute control button with focus Display previous screen Display previous screen
	[Alt Tab] [Alt "Shortcut Letter" Key]	Scroll between alternative active Windows programs Initiate event associate underlined key on open form
	["Shortcut Letter" Key]	Initiate displayed menu step with associate key underlined
	[Ctrl "Shortcut Letter" Key]	Initiate menu step with associate key underlined
	[Up arrow]	(Date Fields) increase day by one.
	[Down arrow]	(Date Fields) reduce day by one.
	[Page up]	(Date Fields) increase month by one.
	[Page down] Double Click	(Date Field) Automatically enters system date value

Installation

It is strongly recommended that you read *System Requirements* (page 3) and *About The System* (page 4) of this manual before you start the installation.

To install your Employee Tracker software place the CD in a CD drive, browse the CD and double click the [*setup.exe*] file within the Employee Tracker (ET) or Employee Tracker Plus (ETP) folder.

Follow the instructions on the screen as displayed.

Data Capture Software

If you are using bar-code, magnetic, proximity, data collection devices or our PC time clock, or WEB based time capture to capture employee clock in/out information, you will have to install the appropriate data capture processing software from Advanced Tracker. Please consult the related documentation for that product in order to install and operate it.

Set Data Path

Next, you will need to create a folder on your hard drive where the Employee Tracker data will be stored. Create a new folder and name it however you would like. For example: ETPData.

Now that you have a folder for your data to be stored in, you can initiate your software and set the data path appropriately. Follow the steps beginning on page 9.

Employee Tracker Quick Start

After the Software Is Installed

To initiate Employee Tracker software: Click the [**Start**] button, [**Programs**], [**ETP**], and then [**ETP**] again.

The following screen will appear on initial startup of Employee Tracker. You will now need to set your data path to the folder you created. (Note: see page 8 if you haven't created this folder).

First, click on [**Options**] in the menu bar. Next, select [**Allow creation of blank databases on "invalid" datapath**]. Now you can set your data path to point to the folder you created earlier. On the left-hand side under Directory select the folder. Once you've selected the folder click on [**Ok**]. The database will be now be created.

- Set DataPaths	
Options	
Set D	ata Paths
Directory	_ive!
Directory	Current Data Path:
ADOBEAPP CDPRO Documents and Settings jimmy Laser Jet 4000 outlook Program Files TEMP	CLETP.MDB CLETP.MDB ETP.MDB ETP.MDB ETP.MDB ETP.MDB
Drives:	
Map Network Drive	<u>O</u> k E<u>x</u>it <<

After the databases have been created a login screen will appear prompting you to enter your **User ID** and **Password**. The default User ID is "**Master**" and the Password is "**Scout**". Note: You will be able to change these to your preferences later on. Enter the appropriate information and click [**OK**] to proceed to the main menu.

😳 Employee Tracker Plus [Your Company] - Login 📃 🗖 🔀				
Enter User ID and Password				
User Id	<u>0</u> K			
Password	E <u>x</u> it <<			

At the first start up of Employee Tracker, the system will display an information window, as shown below, and advise that some setup is required.



Click on [**Ok**] and the Customize Software window will open. You are required to enter some information now. See instructions starting on page 11.

Customizing Your Software

This is a "one-time" setup function that will enable you to set your environment to your preferences.

If the Customize Software window is not already open, select [<u>U</u>tilities] and then [Customize Software].

😋 Emp	C Employee Tracker Plus [Your Company]						
Setup	Operations	Reports	Utilities External Exit Help				
			Time Recorder ⊆ommunications ►				
			Set Data Path z:\Advanced tracker\demodata\etp\cusmfg Backup Databases				
			Customize Software				

The following screen will appear. Notice each of the different tabs to customize your software. Next we will explore most of these tabs and guide you through your setup.

Employee Tracker Plus [Your Company] - Custor	nize Software			
Schedule	Advanced			
Employer Control Information	Custo	m Reports	Tim	e and Attendance
General	User-Defined E	mployee Fields	User-Defined Er	mployee Statistical Fields
Country: Canada Unit Default value for holiday pa Default value for absent tim Standard C Total Hours / Tot Average Days Worked Prior To Holida Full Time Equivalent (HH:MM Include ABSENT time Include HOLIDAY time	ted States y 08:00 e 08:00 tal Shifts y 30 176:00 ?	Rate Source (System Default) Take higher of the three Image: Take higher of the three <th>Default) te to all records ideration: 04:00 Time As Amount Decimal Hours:Minutes; •</th>		Default) te to all records ideration: 04:00 Time As Amount Decimal Hours:Minutes; •
Automatic Date Range Offset? Offset (in day	rs) [14	Pay highest rate fo	or overlapping tim	Shift-Lunch Rules 🔽
Barcode Font Code390neInch-Regular	•		Auto-compact da	atabases on start-up 🗖
Automatically exit Employee Tracker 00:00 hh:mm (enter 0:00 to disable	if idle for e)	Process the de	fined Payroll Peri	Points system
				<u>O</u> k E <u>x</u> it <<

General Tab – Customize Software

First, we'll start with the General tab to customize your software. Below the following window you will find an explanation of each section of this tab.

Schedule	Advanced			
Employer Control Information	Cus	tom Reports	Tim	e and Attendance
General	User-Defined	d Employee Fields	User-Defined E	mployee Statistical Fields
Country: Canada United States Default value for holiday pay 08:00 Default value for absent time 08:00 Standard Total Hours / Total Shifts Average Days Worked Prior To Holiday 30 Full Time Equivalent (HILMM) 176:00 Include ABSENT time? Include HOLIDAY time? Automatic Date Range Offset? Image: Control of Control		Rate S Take high	Source (System er of the three	Default)
		Do you want to ap on a logical day? Minimum time	ply the highest ra duration for cons	te to all records
		Time Of 12-Hour Clock (hh:m	Day mam/pm) 💌	Time As Amount Decimal C Hours Minutes
		Pay highest rate f	Special Holida	ny Pay Run Averaging 🔽 Shift-Lunch Rules 🔽 ne-zoned premiums Г
Barcode Font Code390neinch-Regular	•		Auto-compact d	atabases on start-up 🔽 Use the daily-tool bar 🗖
Automatically exit Employee Tracker	if idle for 9)	Process the de	fined Payroll Peri	Points system 🔽
				<u>O</u> k E <u>x</u> it •

Country:
Canada
United States

Select Canada or the United States. This will set the Province/State and Postal Code/Zip Code labels to the appropriate setting for the selected Country.



Set these fields to the most common standard shift length. When entering stat holiday and absent transactions, a double-click in the time field will copy the values entered here.

Standard	C Total Hours / Total	Shifts
Average Day	rs Worked Prior To Holiday	30
Fu	II Time Equivalent (HH:MM)	176:00
	Include ABSENT time?	
	Include HOLIDAY time?	

These fields enable you to enter stat holiday pay calculation parameters. The system also supports more detailed stat holiday calculation rules on the "Setup" menu which will supercede these. This entry is however, mandatory.



Employee Tracker processes all transactional and scheduling information by "from" and "to" date ranges. This setting allows you to condition the "to" date to be offset be "X" number of days from the "from" date. Example: To always display 2 weeks, enter 14.



Used for badges to select bar font of your choice. This is required.

Automatically exit Employee Tracker if idle for 00:00 hh:mm (enter 0:00 to disable)

Employee Tracker will automatically shut down if a value greater than 00:00 is entered. The shutdown occurs from the main menu only. All users should be advised to exit the system when they are not using it.



Employee Tracker will determine an employee's Rate Source from where you choose. You can select one of four options to determine the rate. Your choices in the drop-down menu are: Take the higher of the three (default), Take positional if applied, Take employee rate always or Take department rate always. The setting here is global. This can be overridden at the employee profile level. Set this to accommodate the greatest population of your workforce.



You can select either a 12-Hour or 24-Hour time display format for the time & attendance transaction screen. *Please note*: Time can still be entered in either format, this is for display purposes only. The decimal vs. hours/minutes option is under construction.



Special Holiday Pay Run Averaging: Legacy, don't use.

Shift-Lunch Rules: Turn this on if employees are optionally scanning out for lunch. This switch will turn on a window in the "Shift" entry step that will prompt you to enter lunch processing parameters.

Pay highest rate for overlapping time-zoned premiums: Turn this on if you have time-zone based premium pay and you wish to default to the higher rate when zones overlap.

Auto-compact databases on start-up: Turn this on to force the system to compact upon start up. Do not use this in a multi-user environment.

Use the daily-tool bar: Allows user the option to display a large button tool bar of commonly used menu steps on the main screen.

Points System: Turns on the absenteeism/tardy demerit points system. When this is turned on, Time calculation rules and absent code menu steps will prompt you to enter user-defined time-based points threshold values. The menus and security will mutate to display points related processing such as points letters and points analysis reporting.

Process the defined Payroll Period one day at a time: Employee Tracker natively processes your payroll export step using a simple "from" / "to" date selection method. You therefore simply enter the starting date and ending date of the pay period each time you run the payroll export step. If you turn on this switch, the system will process payroll exports by pay period number. You will then have to pre-enter enter your pay periods "from" / "to" dates and pay period numbers on a step in the setup menu.

Advanced Tab – Customize Software

Next, we'll work on the Advanced tab to customize your software. Below the following window, you will find an explanation of each section of this tab.

Employer Control Information	Custom Reports		Time and Attendance		
General	User-Defined Employee Fields		User-Defined Employee Statistical Fields		
Schedule	Adv	enced	1		
Set a network photo-location		Which rounding sty of dollars?	le do you wish to use for calculation		
Pick up the General Ledger Account num	ber (G.L. Acct #)	• High-Pre	cision C Low-Precision		
✓ from Position/Department/Payroll Default ✓ Include the General Ledger Account num Payroll Export Audit List	s for premiums ber on the	How many digit pre record rates to be r	ccision do you want piece work ecorded at? C 3 Diait		
General Ledger Account Mask					
Export overtime with base rate for payrol		Bank rates with pre	emiums attached		
External Payroll Magic		Use the job table	umante		
Finable "Absent Code Groups" for percent of paid times.	tage distribution	 Prompt to save all o Enhance Specification 	changes to Employee profiles on Buckets with extra Payroll fields		
Holiday Pay Override For Employee	e's Regular	Choose a character scan-fields:	to be used as a prefix on		
Mon Tues Wed Thur Fri Sat Sun 08:00 08:00 08:00 08:00 08:00 08:00 08:00					
			<u>O</u> k E <u>x</u> it <		

Cat a matural	
Set a network	trishared photos
photo-location	r. on ar capitor o

Used if you have deployed in a multi-user environment. Enter the network location of the photo files.



Pick up the General Ledger Account number (G.L. Acct #) from Position/Department/Payroll Defaults for premiums: If you are passing G/L codes to your payroll system, utilize premiums, and wish to carry the G/L code from the position or department payroll export, turn this switch on.

Include the General Ledger Account number on the Payroll Export Audit List: Turn this on if you are tracking by G/L code and wish to print the G/L code on the payroll export audit report.

General Ledger Account Mask: Turn this on if your G/L code is built from a combination of department/position and or job. This will cause the G/L mask step to display on the "Setup/special" sub-menu.

Export overtime with base rate for payroll: Turn this on if your overtime and double time rate must be the base rate when exported to your payroll.

External Payroll Magic: Turn this on if we have created custom software to format your payroll export file to meet unusual, non-standard requirements.

(*Note:* Advanced tracker will advise you when this should be turned on, otherwise leave it off).

Enable "Absent Code Groups" for percentage distribution
of paid times.

The Absent Groups feature allows you to define a group of two or more absent codes that will automatically be tied together when they are entered in *Edit Time and Attendance*. For instance, if a company/organization has an employee on Worker's Compensation and has to make up the difference in the employee's wage, a 'WCB' Absent code can be tied to a 'Makeup Difference' absent code.

Holiday Pay Override For Employee's Regular Days Off							
Mon	Tues	Wed	Thur	Fri	Sat	Sun	
08:00	08:00	08:00	08:00	08:00	08:00	08:00	

Turn this on if you have variable default work shift durations that effect stat holiday pay based on the day of the stat.



Set to High-Precision if you wish to calculate extended dollars based on 3 decimal place precision vs. 2 decimal places (Low-Precision)



If you are processing piece work transactions and require 3 decimal place precision, set accordingly.



Bank rates with premiums attached: If you are using time banking and time that is banked has a premium attached, if you turn this switch on the hourly rate of the banked time will include the premium rate value.

Use the job table: If you track time against job codes, turn this switch on. When "on" a menu step to enter job codes will appear in the setup menu.

Use the related documents: Employee Tracker allows you to attach to external documents such as Word documents. Turn this on and the setup/special menu will enable you to enter these documents so you can attach them employees via the notes function.

Prompt to save all changes to Employee Profiles: Turn this on to have the system prompt you to save data entered in the employee profile entry.

Enhance Specification Buckets with extra Payroll fields: Turn this on to add 2 more filter data elements for the "employee specification bucket" function of the system. The extra fields added are Pay Type and Frequency.

Choose a character to be used as a prefix on scan-fields:					
Absent	Position		Premium		
Department	Job				

If you are planning to have employees or supervisors scan any of this information using bar-codes, the bar-codes may need leading characters. Advanced Tracker will advise you when this is required and will advise you of the values.

User-Defined Employee Fields Tab - Customize Software

You can create a "user-defined" field for your employees that will enable you to enter and print this data against your employees. Be sure to review the list of employee data fields available in the data dictionary in Appendix "A" before creating new fields here. You will find the fields defined in the database [etp.mdb] within the table called "employee".

Employee Tracker Plus [Your Company] - Customize Software						
Schedule	Advanced					
Employer Control Information	Custom Reports	Time and Attendance				
General	User-Defined Employee Fields	User-Defined Employee Statistical Fields				
	P LTC#					
	OCKER #					
	Add Edit Delete					
-		' I I				
		<u>Q</u> k E <u>x</u> it <<				

User-Defined Employee Statistical Fields Tab – Customize Software

These two fields will be available as entry fields in the employee profile data if you turn them on.

Employee Tracker Plus [Your Company] - Customize Software							
Schedule		Advanced					
Employer Control Informat	Employer Control Information		Time and Attendance				
General		User-Defined Employee Fields	User-Defined Employee Statistical Fields				
Employer Control Information General Vear To D Seniority		Date Hours / Number					
			<u>O</u> k <u>Ex</u> it <<				

Employer Control Information Tab – Customize Software

Employee Tracker Plus [Your Company] - Co	stomize Software	
General	User-Defined Employee Fields	User-Defined Employee Statistical Fields
Sehedule	Advanend	
Employer Control Information	Custom Reports	Time and Attendance
Name: Voi	r Company	
Address: 123	4	
City: Sur	rey	
Country: Car	ada	
Province BC-	initish Columbia	• II
Postal Code		
Phone Number: (604	531.3774	

Simply fill in the blanks with your appropriate company information.

	Custom Reports	Time and Attendance
General	User-Defined Employee Fields	User-Defined Employee Statistical Fiel
Schedule	Advanced	ſ
Vulse The Crewing Schedule?		
Define Shift Periods Crewing Te	mplate	
Prograide time calculation rule on sc	heduled days off	
Defaulte (overrid	on by Statue, then Employee)	
First Day Off Stee Bule From S	tatus/Employee >	
Second Day Off Stee Rule From S	tatus/Employee >	
Third Day Off < Yos Rule From S	tatus/Employee > -	
Treat sheept and bailday records similar	in standard	
scheduled days in regards to copylpaste	operations.	
		Ok Exit

Schedule Tab- Customize Software

If you are using weekly crew scheduling, you will have to enter shifts,

Crewing Template

departments and positions from the setup menu first. Then you can return to this step and set up shift periods and crewing templates.

☑ Override time calculation rule on scheduled days-off						
	Defaults (overriden by Status, then Employee)					
First Day Off	< Vse Rule From Status/Employee >	•				
Second Day Off	< Vse Rule From Status/Employee >	•				
Third Day Off	< Use Rule From Status/Employee >	•				

Define Shift Periods

If you have overtime rules that are conditioned to working on first, second, or third scheduled days off, you would have to set up time calculation rules first and then return to this step and point the relevant days off to the appropriate time calculation rule. This is the system default and can be overridden for exceptions at the status or employee level.

-	Treat absent and holiday records similar to standard
	scheduled days in regards to copy/paste operations.

Checking this option allows you to perform time-saving copy/paste functions in the same manner as with scheduled work days.



Time and Attendance Tab – Customize Software

- Edit Time and Attend Source Error Records Assent Records Holiday Records Piece Records Break Records Premain Records Daily Totals Weekly Totals Crand Total	ance Row Celes	Time Records Error Records Absent Records Plots Records Brook Records Premtim Records Bally Totals
Grand Total		Weekly Total Grand Total

Here you can define the colors for each record type that will be displayed on the "Time and Attendance" transaction edit screen.



Disable Changes To In/Out Times: Turn this on if you want users to physically change "in / out" scans.

Show original IN/OUT times?: Turn this on to display the original "in/out" swipes as a column on the time & attendance edit screen.

Allow multiple shifts and time calculation rules on a logical day: Turn this on to enable employees to work more than one shift per day.

Attach Shift/Employee Premiums to ABSENT Records: Turn this on to pay premiums against absenteeism.

Attach Shift/Employee Premiums to HOLIDAY Records: Turn this on to pay premiums against stat holidays.

Log Overrides in Notes Field: Turn this on to have the system write record overwrites to the notes field.

Log Record Additions in Notes Field: Turn this on to have the system write record additions to the notes field.



Verify Any Changes to Record Notes: This switch will prompt the user when they attempt to overwrite a notes field in the edit time & attendance screen.

Affect all records in a day when approving DAILY OVERTIME?: When turned on, this switch will cause all records on a logical day to be approved for overtime when the overtime approval flag is set to "Y".

Prompt when applying premiums: This switch will prompt the user when they manually apply premium pay at the time & attendance adjustment screen.

Never allow user to enter overlapping time records: This switch will prevent the manual entry of overlapping swipes.

"Day" should reflect 📀 Worked Date 🔿 Shift Date

The system uses a shift date and work date for all transactions. The work date applies to the date the employee swiped in. The shift date refers to the date the transaction is applied to. Reports and screens will display the day of the week. Ex. Mon, Tues. This switch controls whether you want to display the shift date or the work date day.



Turn this on to force transaction level approval for these record types. You can define supervisory and/or employee approval. Employee approval requires the installation of Employee Self-Service module.

Now we will close the Customize Software window and set up other information required by *Employee Tracker* under the [Setup] menu option.

Time Calculation Rules (Mandatory)

From the [**Setup**] menu select [**Time Calculation Rules**] and enter your time calculation rules. These rules allow you to define rounding and grace periods, overtime rules, and lunch deduction rules.



Holiday Pay Rules (Optional)

From the [**Setup**] menu, select [**Holiday Pay Rules**] and enter your stat holiday pay rules. These rules are generally governed by provincial or state labor law. Most employers create one rule for full-time staff and one rule for part-time staff.



Employee Status (Mandatory)

From the [Setup] menu, select [Employee Status] and create one or more employee status codes. These codes are used to group your employees for efficient processing and reporting. Each employee is assigned to a status code. Employee status codes play a critical role in Employee Tracker. Status codes are one of four major data elements used to filter and select employees throughout the system. The other three major elements required are Supervisor, Department, and Shift. Employee Tracker security enables you to create user profiles, defining employee access based on the employee status code and the other three fields.

Typical status code examples are: FT – Full Time, PT – Part Time, T- Terminated and L-Laid off.



Absent Codes (Optional)

From the [**Setup**] menu, select [**Absents**] and create one or more absenteeism reason codes. These codes will be used to document absenteeism transactions for your employees. You will be able to define each of the absent codes as "paid" or "unpaid", and for "paid" absenteeism you will define the appropriate earning code and G/L code if required. Employee Tracker has several reports that will enable you to analyze absenteeism. Also, if you are using the time banking feature, certain absenteeism codes will be linked to the appropriate time bank.

Typical absenteeism code examples are: VAC – Vacation, SICK – Sickness and JD-Jury Duty

Employee Tracker Plus	[Your C	ompany]					
Setup Operations Reports	Utilities	External	Exit	<u>H</u> elp			
Time Calculation Rules							
Holiday Pay Rules		📿 Emplo	yee Tr	acker Plus [Yo	ur Company] - Se	tup/Attendance Abser	nt Codes 💶 🗵 🗙
Employee Status					Absent C	odes	
Absents		Inn		DEDEALIENE	NE LESTE		
Departments		BT		BANKED OV	ERTIME		
		СВ		CALL BACK			
		CL		COMPASSIO	NATE LEAVE		
		JD		JURY DUTY			
		LOA		LEAVE OF	ABSENCE		
		LTD		LONG-TERM	DISABILITY		
		ML		MATERNITY	LEAVE		-1
		INA		UNAPPROVE	DABSENCE		
		Ad	d	<u>E</u> dit	<u>D</u> elete		<u>R</u> enumber
		<< <u>P</u> re	vious	: <u>N</u> ext >>			E <u>x</u> it <<

Departments (Mandatory)

From the [Setup] menu, select [Departments] and create one or more department codes. These codes are used to group your employees for efficient processing and reporting and they allow you to define earning codes, G/L codes, and hourly rates if departments are a rate source. Each employee is assigned to a home department. All time and attendance transactions are applied to each employees' home department unless an override function is performed.

Departments play a critical role in Employee Tracker. They are one of four major data elements used to filter and select employees throughout the system. The other three elements used are Supervisor, Employee status, and Shift. Employee Tracker security enables you to create user profiles, defining employee access based on the department code and the other three fields.

Departments also play a critical role in scheduling as schedules can be created including departmental assignments and you can print or view schedules by department.

Employee Tracker Plus	[Your Co	ompany]				
Setup Operations Reports	Utilities	External Exit <u>H</u> e	lp			
Time Calculation Rules						
Holiday Pay Rules		Employee Tracker F	Plus [Your Con	npany] - Setup	D/Departments	
Employee Status				Departm	nents	
<u>Departments</u>		100 PACE	AGING			
Premjums		120 RECE	IVING			~~~~
		140 MAIN	TENANCE			
		170 LINE	1			
		180 LINE	2			
		190 LINE	3			
		<u>A</u> dd	<u>E</u> dit	<u>D</u> elete		<u>R</u> enumber
		<< <u>P</u> revious	<u>N</u> ext >>	J		E <u>x</u> it <<

Premiums (Optional)

If you do not pay any of your employees' premiums or differentials skip this step. Otherwise, from the [**Setup**] menu select [**Premiums**] and create one premium record for each unique premium you have. You will enter the appropriate parameters and you can define earning codes and G/L codes for each premium record. Premiums will be assigned to either a shift or an employee. You may want to consult with an Advanced Tracker professional to determine the best way to set up premiums for your company as there are many ways to do this. Typical premium examples are: Afternoon, Night, First Aid and Lead Hand.



Shifts (Mandatory)

From the [**Setup**] menu select [**Shifts**] and create one or more shift codes. These codes are used define the start/stop times of work shifts and to group your employees for efficient processing and reporting. Each employee is assigned to a home shift and the employee tracker scheduling module enables you to schedule employees to work shifts on specific calendar days. All time and attendance transactions are applied to each employees scheduled or home shift unless an override function is performed. Shifts play a critical role in Employee Tracker. Shifts are one of four major data elements used to filter and select employees throughout the system. The other three elements are Supervisor, Employee Status, and Department. Employee Tracker security enables you to create user profiles, defining employee access based on the shift code and the other three fields.

Typical shift code examples are: Day (07:00 – 15:30) and Aft (15:30 – 23:00)

Employee Tracker Plus	[Your Company]	
Setup Operations Reports	<u>U</u> tilities External Exit <u>H</u> elp	
Time Calculation Rules	Employee Tracker Plus [Your Company] - Setup/Shifts	
Holiday Pay Rules Employee Status	Shifts	
Absents Departments Premjums Shifts Positions Time Parks	07:00 07:00 - 15:30 08:00 08:00 - 16:30 13:30 13:30 - 22:00 15:00 15:00 - 23:00 23:00 23:00 - 07:00	
	Add Edit Delete Copy	<u>R</u> enumber
	<< <u>P</u> revious <u>N</u> ext >>	E <u>x</u> it <<

Positions (Optional)

If you do not track or pay employees by position or job classification, you may be able to skip this step, otherwise, from the [**Setup**] menu select [**Positions**] and create one or more position codes. These codes are used to define skills or classification against your employees and they allow you to define earning codes, G/L codes, and hourly rates if positions are a rate source. Each employee is assigned to a default position, and as many secondary positions as required. All time and attendance transactions are applied to each employees' default or scheduled position unless an override function is performed. Positions play a critical role in scheduling as schedules can be created including positional assignments and you can print or view schedules by position.

Position code examples: WELD – Welder, COOK – Cook and RN – Registered Nurse.

Employee Tracker Plus	[Your Company]	
Setup Operations Reports	<u>U</u> tilities External Exit <u>H</u> elp	
Time Calculation Rules		
Holiday Pay Rules	Employee Tracker Plus [Your Company] - Setup/Positions	
Employee Status	Basitisna	-
Absents	Positions	
<u>D</u> epartments	G1 GENERAL PRODUCTION 1	ור
Premjums	G2 GENERAL PRODUCTION 2	
<u>S</u> hifts	G3 GENERAL PRODUCTION 3	
<u>P</u> ositions	M1 MAINTENANCE 1	
Time <u>B</u> anks	M2 MAINTENANCE 2	
	M3 MAINTENANCE 3	
	SHTP SHTPPER	
	Add Edit Delete Renumber	
	<< Previous Next >> Exit <<	

Time Banks (Optional)

From the [**Setup**] menu select [**Time Banks**] to create time banks and assign them to eligible employees. If your employees are entitled to time off with pay such as vacation, sick pay, banked overtime, or lieu time pay, you can use time banks to manage the information. Time banking within Employee Tracker enables you to create time banks and define: open/close date, accrual formula, maximum accrual value, negative balance switch and absent code(s) to withdraw from the bank.

Typical time bank code examples include: VAC – Vacation, OT – Overtime Banking and SICK- Sick Bank

C Employee Tracker Plus [Your Company]			
Setup Operations Reports	Utilities External Exit	Help		
Time Calculation Rules Holiday Pay Rules Employee Status	Employee Trac	sker Plus (Your Company) - Se Time I	tup/Time Banks Banks	
Absents Departments Premjums Shifts <u>Positions</u> <u>Time Banks</u> Employees Holictous	FLEX LIEU OT PTO SICK VAC4 VAC6 VAC8	PLEX TIME LIEU OT PTO SICK VAC 49 VAC 69 VAC 89	<pre><open> <open> <ope< td=""><td></td></ope<></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></open></pre>	
	<u>A</u> dd << <u>P</u> revious	Edit Delete	<u>C</u> opy <u>R</u>	enumber E <u>x</u> it <<

Employees (Mandatory)

From the [**Setup**] menu, select [**Employees**] to enter employee information. Here you can Add, Edit , Delete or Renumber employees.

To add a new employee, click the [**<u>A</u>dd**] button from the Employees box. The Employee Profile Box will appear. A list of employee information categories will be displayed on the top left-hand side of the screen

Some of the employee information is mandatory and most of it is optional. Fields with blue labels are mandatory and fields with black labels are optional. The categories containing mandatory information are: "Information, defaults, and dates". Enter the information for the employee by

To operate this step you will need functional knowledge of the "*Employee Specification Buckets*" Please refer to page 4 of this guide if you are not comfortable with this functionality.

😧 Employee Tracker Plus	[Your Company]
Setup Operations Reports	<u>U</u> tilities External Exit <u>H</u> elp
<u>Time Calculation Rules</u> Holiday Pay Rules Employee Status <u>A</u> bsents <u>D</u> epartments Jobs Premiums <u>Shifts</u> <u>Positions</u> Time <u>B</u> anks <u>Employees</u> <u>Holidays</u> Payroll E <u>x</u> port	Engloyee Profile File Ves Information Orderats Personal Contact Beneficiary Operational Personal Contact Beneficiary Defaults Premain Dates Statistical Fields Dates Statistical Fields Doces User-Defined Fields Doces Statistical Fields Doces JONEST Balge Regort Name
	<pre> End and a second and</pre>

Statutory Holiday Dates (Optional)

If you plan to use Employee Tracker to generate Stat holiday pay or if you pay overtime for hours worked on a Statutory holiday, then you need to enter the specific dates for each stat holiday. From the [**Setup**] menu select [**Holidays**] and enter each future stat holiday.

**Note: do not use any special characters within the Holiday name (eg: use "New Years Day" <u>not</u> "New Year's Day").

Employee Tracker Plus	[Your C	ompany]			
Setup Operations Reports	<u>U</u> tilities	External	Exit	<u>H</u> elp	
Time Calculation Rules				Employee Tracker Pl	us [Your Company] - Statutory/Public Holidays
Holiday Pay Rules					Statutory/Public Holidays
Employee Status Absents Departments Jobs Premjums Shifts Positions Time Banks Employees Holidaue				12/26/2002 12/25/2002 09/02/2002 08/05/2002 07/01/2002 05/20/2002 04/19/2002 01/01/2002 Add	BOXING DAY CHRISTMAS DAY THANKS GIVING DAY LABOR DAY CIVIC HOLIDAY CANADA DAY VICTORIA DAY GOOD FRIDAY NEW YEARS Edit Delete
Payroll Export				<< <u>P</u> revious	<u>N</u> ext >> E <u>x</u> it <<

Note: this is subject to annual review and input.

Payroll Export (Optional)

If you plan to use Employee Tracker to export summarized earnings to your payroll system, then select your payroll product from the list displayed in the [**Setup**] menu [**Payroll Export**] function. Fill in the blanks with the relevant information. If you don't see your payroll product, or if you need assistance in setting this up, contact Advanced Tracker Technologies.

Earning codes may also have to be set up in Absent codes, and premium codes.

Note: Client Code and Earning Codes must match the codes supplied by your Payroll product.

Employee Tracker Plus	[Your Company]	
Setup Operations Reports	<u>U</u> tilities External Exit <u>H</u> elp	
<u>T</u> ime Calculation Rules Holiday Pay Rules Employee Status	Employee Tracker Plus [Your Company] · Payroll	Export Setup ADP Payroll Export Setup
<u>A</u> bsents Departments	Client Code: TA	G Earning G.L. Account Number
Jobs Premjums Shifts	Use External Interface:	Regular Hours: 01 1.5 Hours: 02
Positions Time <u>B</u> anks	I Payroll Export Overwrite File c:\etp\etexp.dat	2.0 Hours: 14
<u>E</u> mployees <u>H</u> olidays	☐ Payroll Export Append File	Holiday 1.5: 12
Schedule	☐ Enable Non-Pay Export	Holiday 2.0.
_	Non-Pay Export Overwrite File	Piece Work: PW
	Non-Pay Export Append File	Help Update Exit <<

Schedule Patterns (Optional)

If your Employees work variable shifts, and there is a repetitive pattern to it, you should create schedule patterns. Simply create one pattern for each situation. You do not need to make a pattern for each employee, but rather one pattern per shift type which can be applied to many employees. To setup schedule patterns select [Setup], [Schedule], [Schedule Patterns].

Typical schedule patterns are: 3 week rotational (day/aft/grave), 4 week swing (2 weeks days, 2 weeks aft), 4 days full and one half day.

Employee Tracker Plus	Mour Co	mpany]										
Setup Operations Reports Time Calculation Rules	<u>U</u> tilities	External	Exit	Help		itane Tascker Plan	D'ave Company) -	Schedule Pollano				
Holiday Pay Rules								80	hedule Patt	erns		
Employee Status						de CONT	Description	CONTINUENTAL 12			Dage	1 Works 2
Absents									Week 1			
Departments						Sch eduiled Clay	Schement Day	Scheduled Day		Scheduled Day	Schedule I Day	Scheduled Day
Ptenjums						0: « Herns » Pi « Defaalt »	B: 4 Hame > P: 4 Default >	D: « Herne » Pi - Collegit >		D: « Home » P: « Default »	D: e Herer » P: < Detect »	D: «Hene» P: «Define»
Shilts									West 7			
Positions									dehoduled Boy	Sebedaled Day	Actuality of Days	Scheduled Day
Time Banks						201000		00000000	5: 67: 16 21 C Martine 3	S: 87588 D: C Home >	S: 47tH DI C Marter >	5: 01:00 DI C Maille D
Employees									P: « Defsait »	Pr + Defaakt 14	R: « Default »	P: «Befinit »
Holdays						_		Sched shed Day	Week 3 Schelluled Box	Scheduled Day		
Payrol Export	0.1.1							31 87/88	31 97, 99	31 8128 9		
Sched_le •	Subst	tubon He	asons					Pt 4 Extent >	P: « Defait »	Prie Defaat >		
Special •	Schej	jule Patte	ma									
					_							
						_	_	_	_	-	_	_
						Add Week	Delete Week	Add Be	y Defete D	ey .	9	Exit oc

Post Employee Schedules (Optional)

If you have made Schedule Patterns, you must now post them to Employees. To post Employee Schedules select [**Setup**], [**Schedule**], [**Post Employee Schedules**]. Simply select employees, select the relevant schedule pattern, select the date to start the posting from and enter the number of repeats for the pattern. You can post a 2 week pattern 26 times, starting on a Monday to schedule an employee for a full year.

Employee Tracker Plus	[Your Company]	
Setup Operations Beports Time Calculation Rules	Utilities External Exit He	p
Holiday Pay Rules Employee Status Abcents Departments Prenijums Shifts Bostions Time Banks Employees Holidays Payrol Export		Post Schedule Patterns Selected Employees Acr 100286 2018008, HIGHELE 01/07/2002 100156 WILL, 2ARICE 01/07/2002 400134 BROWN, HIGHE
Schedule Special +	Substitution Reasons Schegule Patterne Employee Availability Patt	Edit As Of Date
	Budget Patterns Post Employee Sobedules Post Master Schedules	Schedule Paters and a set
		Arry to Briesbie Tollives Peet Egit of

Print Setup Reports

From the [**Reports**], [**Master Information**] menu you can select and print a report for time calculation rules, status codes, attendance codes, departments, shifts and positions.

🔘 Emp	ployee Trac	cker Plus [Your Company]	
<u>S</u> etup	<u>Operations</u>	<u>Reports</u> <u>U</u> tilities External Exit <u>H</u> elp	
		Master Information	s
		Employee Information 🕨 Stat <u>u</u> s Codes	
		Time Analysis	
		Time Banking	
		Attendance Exception Shifts	
		Attendance Specialty Positions	
		Schedule Reports	

From the [**<u>Reports</u>**], [**Employee Information**] menu you can select and print reports for employee information.

🔘 Em	ployee Trac	ker Plus	[Your C	ompany]			
<u>S</u> etup	<u>Operations</u>	Reports	<u>U</u> tilities	External	Exi	it <u>H</u> elp	
		Maste	er Informa	tion			
		Emplo	oyee Infor	mation	•	Employee List	
		Time.	Analysis		•	Employee <u>M</u> aster List	
		Time	Banking		•	Rate <u>H</u> istory	
		Atten	dance E <u>x</u>	ception	•	Employee Positions	
		Atten	dance Sp	ecialty	•	User Defined Fields	
		Sche	dule Rep	orts	•	Employee Badges	
		Adva	nced		•	Note Type Analysis	

From the [**<u>Reports</u>**], [**Time Banking**] menu you can select and print reports for time banks and employee time bank balances.

🔘 Emp	ployee Trac	ker Plus	[Your C	ompany]		
<u>S</u> etup	<u>Operations</u>	Reports	<u>U</u> tilities	External	Exit	<u>H</u> elp
		Mast Emple Time	er Informa oyee Infor Analysis	ition + mation +		
		Time	Banking	•		<u>T</u> ime Banks
		Atten	dance E <u>x</u>	ception 🕨		Employee Time Banks
		Atten	dance Sp	ecialty 🕨		Time Bank Audit
		Cales	Jule Dee			

From the [**<u>Reports</u>**], [**<u>Schedule Reports</u>**] menu you can select and print employee schedules. You can select weekly, one monthly or annual reporting.

Employed	oyee Trac	ker Plus	[Your C	ompany]			
<u>S</u> etup <u>C</u>	perations)	Reports	<u>U</u> tilities	External	Exit	<u>H</u> elp	
		Maste Emple Time Time Atten Atten	er Informa oyee Infor Analysis Banking dance E <u>x</u> dance Sp	tion mation ception becialty			
		S <u>c</u> he Adva Monti	dule Rep nced h End Re	orts) port		Schedule Patterns Employee Availability Patterns Budget Patterns	
						Employee S <u>c</u> hedules Master Schedules	

Operating the System on a Daily Basis

After you have completed the installation and setup of the system you are ready to operate the system.

A list of recommended daily procedures is listed below:

Initiate your time recorder retrieval software and retrieve transactions from the time recorder(s). You can also set this software to retrieve records at specific times or at specific time intervals throughout the day.

From the menu option [**Operations**], select [**Edit Time and Attendance Transactions**]. Set the date range to include the dates you are reviewing. Correct any missing scans, and add any absenteeism information for employees who were absent.



If you want to print a detailed transaction list, select [**<u>Reports</u>**], [**Time Analysis**] and then [**<u>Time and Attendance Transactions</u>**]. Set the date range to include the dates you are printing, and select the employees you are reporting via "employee specification buckets".

🔘 Emp	Employee Tracker Plus [Your Company]												
<u>S</u> etup	<u>Operations</u>	Reports	<u>U</u> tilities	External	Exit	<u>H</u> elp							
		Maste	er Informa	ation									
		Emple	oyee Info	rmation									
		Time	Analysis			Time and Attendance Transactions Ctrl+T							
		Time	Banking	1	•	Original Swipe List							
		Atten	dance Ex	cention	-								

Operating Periodic Steps

There are several steps that you can run on a periodic basis rather than a daily basis as listed below.

Data Backup

Remember to backup your data!

To backup your data, from [<u>U</u>tilities] menu, select [**Backup Databases**]. You will then be prompted "Are you sure you want to backup the databases?" Select [<u>Yes</u>]. This step will create a copy of your data in a folder named "**!!backup!! mm.dd.yyyy**" attached to your active data path folder.

😔 Emp	ployee Trac	ker Plus	[Your C	ompany]								
<u>S</u> etup	<u>Operations</u>	<u>R</u> eports	<u>U</u> tilities	External	Exit	<u>H</u> elp						
			Time	Recorder		nunicatio	ns 🕨					
			<u>S</u> et [Data Path								
			C:\e	tp\rptsam	ET	Р						×
			Back	kup Datab	as (?	Are yo	u sure that you	u want to) backup t	he databa:	ses?
							<u>.</u>	Yes	N	•		

RUNS

Under the [**Operations**] menu option, there are four types of runs available: *Payroll Export Run, Holiday Pay Run, Employee Rate Increase Run* and *Positional Rate Increase Run.* There are four basic steps to all runs. First, you create the run and then edit it. Next, you will print and post the selected run. To keep it simple while you are learning the software, we will discuss two types of runs below: Holiday Pay Run and Payroll Export Run.

Holiday Pay Run

Run this step to pay employees for a public holiday on the first working day after the holiday.

From the menu, hit [Operations] and then [Holiday Pay Run].



Payroll Export

At the end of the pay period after you have finalized the time information, you can run the payroll export step if you are exporting to your payroll system. From the menu, hit [**Operations**] and then [**Payroll Export Run**].

🔾 Emp	oloyee Trac	ker Plus (Your Co	mpany]		
Setup	Operations	Reports	Utilities	External	Exit	Help
	Retrieve	Time Reco	rds		Ctrl+F	5
	Edit Time	and Atten	dance Tra	ansactions	Ctrl+E	
	Lock Out	Edits				
	Payroll Ex	ort Run			Ctrl+F	,
	Holiday P	ay Run			Ctrl+ł	1

File Purge

The Purge function is used to permanently delete various types of records. It is useful for deleting old schedules, groups of holiday records or any other type of record in ETP.

WARNING: Be very careful when using this feature, as it cannot be undone!!! Once the records are deleted, they cannot be recovered!

Employee Tracker Plus - Purge
Purge
Selected Employees
0099 GIBBONS, ERIC 0083 KALINA, MICHAEL 0046 MEYERS, JEFFREY A. 0108 WEIMBERG, ROBERT P. 0026 WOITZEL, JOSEPH E.
Records To Purge Time Time Errors Premium Absent Break Schedule Holiday Piece
From Date 07/13/2000
Purge Exit <<

From the [**Utilities**] menu, select [**Purge**]. The above window will appear. Select the appropriate Employee(s) from the bucket. Then select which record types you would like to delete for the selected employees by checking off the appropriate boxes (ie. Time, Absent, Holiday, Time Errors, etc.).

Next, select the date range of records to delete within the *From Date* and *To Date* fields. Click the [**Purge**] button. Before the records are purged, the system will give you one last warning. "Do you wish to continue the purging process?". Select [**Yes**] and your records will be deleted. After Purging records, see below info on *File Compact & Repair*.

File Compact & Repair

When the Purge process is complete, you will be prompted with another window. It will say: "*Purging Complete. For best results, it is recommended that you perform a Compact and Repair on the database by going into Utilities->Compact Database.*"

This function is used to **clean up** the databases after a high level of data manipulation.

From the [<u>U</u>tilities] menu, select [Compact Database]. A window will appear indicating the status of the job. Once the Compact & Repair is complete, a pop-up window will notify you. Click [Ok] to return to the ETP main screen.

Time Recording

Time Recorder Setup

Are you using electronic time recorders with Employee Tracker?

If **yes**, please consult the document relevant to your time recorder. The publications available are:

Symcod CMI 2016 RSI Hand Punch RSI HP3000 Serial

LET'S RUN THE SYSTEM THROUGH THE ROPES AND MAKE SURE TIME RECORDING WORKS!

Take an employee badge and scan in on the time recorder. (If you have more than one time recorder, scan a different badge on each time recorder and keep track of the badges for audit purposes).

Initiate your time recorder retrieval software and retrieve transactions from the time recorder(s).

From menu item [**Operations**], select [**Edit Time and Attendance Transactions**]. Set the date range to include the date of the scans, select the employees whom you scanned, and view the transactions you've scanned.

😡 Emp	oloyee Trac	ker Plus	[Your C	ompany]			
<u>S</u> etup	Operations	<u>R</u> eports	<u>U</u> tilities	External	Exit	Help	
	<u>R</u> etrieve	Time Rec		Ctrl	+R		
	<u>E</u> dit Tim	e and Atte	ndance T	ransaction	s Ctrl	+E	

Wait 15 minutes and go scan the same badges out.

Initiate your time recorder retrieval software and retrieve transactions from the time recorder(s).

Once again, choose menu item [**Operations**] and then select [**Edit Time and Attendance Transactions**]. Set the date range to include the date of the scans, select the employees whom you scanned, and view the transactions you've scanned. The records should all have "in" times and "out" times with calculated hours/minutes. If all is well, you can delete the records.

You can now issue badges to employees and show them how to scan.

Badges

Are you going to make your own badges with Employee Tracker?

Step 1: BADGE SHEET LAYOUT

From the [<u>U</u>tilities] menu select [Badge Sheet Layout]. Then from the Badge Sheet Layouts window select [<u>A</u>dd]. You can create multiple layouts of how you would like your badges setup and printed on a page.

Backup Datab	ates	r [Your Company] - Baden Cheat Lawords			
Set Printer	chiptoyee tracker rik	Badge Sheet Layouts			
Security System Access	No layouts Cre	eated.	es		
Employee Badg Badge Sheet L Badge Element	ge Layout ayout : Colors	Employee Tracker Plus [Your Company] - Badge Sheet Layouts Create Badge Layout			
Set Default Ba	dge Printer	Code Test	Hor. Distance from edge of sheet Vert. Distance from edge of sheet	p p	incher
		Columns per sheet 2 Rows per sheet 4	Hor. Space between badges Vert. Space	0.5 0.5	inche inche
		Vertical Offset	Existing Badge Width Existing Badge Height	μ β	inche

Step 2: EMPLOYEE BADGE LAYOUT

From the [Utilities] menu select [Employee Badge Layout]. Then from the Badge Layouts window select [Add]. You can now create multiple badge layouts and link your corporate logo and employee photos. (.BMP or .JPG images accepted).



3. Print your badges

From the [<u>**Reports**</u>] menu select [**Employee Information**] and then [**Employee Badges**]. Now select which employees you wish to print badges for by using the bucket. When all employees you need are selected, click [<u>**Print**</u>].



NOTES:
