TimeClock Manager provides several tools to allow users to view and approve information as soon as they log in through Dashboard Widgets. Users can create several widgets across unique workspaces, each with their filter. For example, a director that oversees both the Maintenance and Cafeteria departments could create workspaces that let him see hour exceptions and approaching overtime for each department.

Types of Widgets

The Clock Exception widget displays all clock exceptions for the filtered employees across the current open week period. Multiple Clock Exception widgets can be set up in the same workspace to track different types of exceptions (for example, separate widgets could be used to track segments requiring employee approval and segments requiring manager approval).

The Approaching Overtime widget functions the same as the Approaching Overtime report. Employees within a certain threshold of hitting overtime will be displayed, along with how many minutes until they are in overtime.

The Pending Time Off Request widget displays employees who have upcoming time-off requests still requiring approval from the user. The user can approve or deny requests within the widget with a single click.

The Employee Events widget displays upcoming or recent employee reviews, birthdays, or hire date anniversaries.

The Reminders widget provides a workspace for users to make their own task lists or text reminders that will be visible each time they log in.
Creating a Workspace

1. Log into **TimeClock Manager**. If you start anywhere besides the **Dashboard**, click on the **Home** icon.
2. Click on the **Edit** button to add widgets to the first page of workspaces.
3. Select the column you would like a widget to appear in, then select the Type of widget you would like to display.
4. Select the color you would like the widget to appear by clicking on the **pen** icon.
5. If you would like to change the name of the widget, type in the new name next to the **pen** icon. This can be used to differentiate different types of widgets. For example, if you would like to create a reminder widget that only shows upcoming tasks, you could rename it "To-Do List."
6. Widgets can be dragged and dropped to be placed elsewhere by clicking on the drag symbol in the upper left corner. To remove a widget, click on the red X icon in the upper right.
7. If you'd like the widgets on this workspace to apply to only certain employees, that can be defined by using the **Employee Filter** button.
8. Click **Save** to commit the changes made to your dashboard. You will be returned to the Dashboard and can view your new widgets in action.
9. To create a second workspace, change pages by clicking on one of the dots above your widgets to change pages, and click **Edit** to define new widgets.

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M-F, 7AM to 6PM CST, Excluding Holidays
Employee Status Essentials

The **Employee Status** screen allows managers to monitor employees in real time. From this 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.

### Employee Status Tabs

- **The All** tab allows the user to view every employee they have access to, their status, and (if clocked in) their job code, time in, and location.
- **The Clocked In** tab only shows the clocked in employees, as well as their job code that employee is clocked in to, the time they clocked in, and the location of the clock operation.
- **The On Break** tab only shows employees that are currently on break, as well as the job code that employee is clocked in to, the time they took a break, the duration of the break, and the location of the clock operation.
- **The Auto Out** tab only shows employees that are clocked into an auto out job code, as well as the job code that employee is clocked into, the time they clocked in, and the location of the clock operation.
- **The Not In** tab only shows employees that are not currently clocked in.
- **The On Leave** tab shows each employee currently clocked into a leave code as well as any shift notes about that segment.
- **The Last Punch** tab shows each employee, their status, their last clock in, and their last clock out.
The **Hours** tab shows each employee, their hire date, the amount of hours worked today, the amount of hours worked this week, their employee status, and the last time that employee clocked out.

### 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 or select **Segment** and choose **Clock Out**.
3. In the **Clock Out** window, enter the date and time you want the segment to end on and click on **Clock out**.

### Changing an Employee Job Code

1. Select the employee(s) you wish to change job codes for from the **Employee Status** list.
2. Right click on the employee or select **Segment** and select **Change job code**.
3. Enter the date and time at which you want to change the employee's job code, as well as the new job code, then click on **Change**.

### Managing an Employee's Hours

1. Select an employee from the **Employee Status** list.
2. Right click on the employee or select **Segment** and select **Individual Hours**.
3. This will take you to the **Individual Hours** window for the employee.

### Viewing an Employee's Shift Information

1. Select an employee from the **Employee Status** list.
2. Right click on the employee or select **Segment** and select **Shift Information**.
3. On the **Shift Information** window, you will see the segments worked for that employee today.

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Exceptions Essentials

An Exception in TimeClock Plus is a critical event that needs to be flagged when reviewing hours. It can also require approval before exporting to payroll, closing the week, or clocking in and out.

While TimeClock Plus can be set to track up to eighteen different exceptions, the user has the ability to choose which exceptions are being tracked for their employees by browsing to Employee > Employee Profiles > Exceptions tab.

There are three categories of exceptions, with each of the types of exceptions listed below.

**Approvals Exceptions**

- **Employee approval**: Tracking shifts that have not been approved by the employee.
- **Manager approval**: Tracking shifts that have not been approved by the employee’s manager.
- **Other approval**: Tracking shifts that have not been approved by a third party.

**Shift Exceptions**

- **Conflicting shift**: A shift whose hours run concurrent with another shift.
- **Short break**: A break that runs short according to the settings located at Company > Company Defaults > Global tab > Breaks.
- **Long break**: A break that runs long according to the settings located at Company > Company Defaults > Global tab > Breaks.
- **Long shift**: A shift that exceeds the amount defined at Employee > Employee Profiles > Exceptions tab.
- **Long week**: A work week that exceeds the amount defined at Employee > Employee Profiles > Exceptions tab.
- **Missed In**: Any clock in segment that is flagged as a missed punch.
- **Missed Out**: Any clock out segment that is flagged as a missed punch.
- **Overtime**: An employee who has exceeded their overtime as defined at Employee > Employee Profiles > Overtime tab.

**Schedule Exceptions**

- **Absent segment**: Segment that occurs when an employee has no shift entered in Manager where a segment was scheduled in Scheduler.
- **Tardy 1**: A shift that begins after a designated period of time from when it was scheduled to begin (defined at Employee > Employee Profiles > Exceptions tab).
• **Tardy 2**: A shift that *begins after* a designated period of time from when it was scheduled to begin (defined at Employee > Employee Profiles > Exceptions tab).

• **Early clock in**: A shift that *begins before* a designated period of time from when it was scheduled to begin (defined at Employee > Employee Profiles > Exceptions tab).

• **Early clock out**: A shift that *ends before* a designated period of time from when it was scheduled to begin (defined at Employee > Employee Profiles > Exceptions tab).

• **Late clock in**: A shift that *begins after* a designated period of time from when it was scheduled to begin (defined at Employee > Employee Profiles > Exceptions tab).

• **Late clock out**: A shift that *ends after* a designated period of time from when it was scheduled to begin (defined at Employee > Employee Profiles > Exceptions tab).
Group Hours Essentials

**GROUP HOURS**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Open Weeks</th>
<th>Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/06/2014</td>
<td>12/20/2014</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sort by: Id | Employee Filter | Exception Filter | Job Code Filter

- **Add Segment** | **Manage Segments** | **Manage Exceptions** | **Resolve period**

Showing 10 records of 10 | Selected 0 records

<table>
<thead>
<tr>
<th>Notes</th>
<th>Edited</th>
<th>Break length</th>
<th>Shift</th>
<th>Times in</th>
<th>Timeout</th>
<th>Hours</th>
<th>Shift total</th>
<th>Week total</th>
</tr>
</thead>
</table>

- **1 - Len Lema**

- **5 - Connie Jacobson**

- **7 - Joanna Ramos**

- **9 - Dallas Green**

**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.
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 Adding Segments (below).
- **Manage**: This button allows you to edit the selected segments. For more information, see Editing Segments (on page 3).
- **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 Job Code Filter.
- **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.

**Adding Segments**

1. Click on the Add button.
2. Select the employees you would like to edit from a filter or from the list. You can use a regular Employee Filter or use the Work Filter.
Work Filter

The **Work Filter** allows you to filter employees based on hours worked as well as specific job codes. For example, if you wanted to only include employees that worked 0:01 to 32:00 hours on the week of October 6th, 2014, you would fill out those fields on the work filter. Up to two different hour filters can be created as well as a job code filter on the **Work Filter** screen.

3. **Click Next.**
4. Create the segment for your employee(s). For more information, see "Adding a Segment" in Individual Hours.
5. If the segment will repeat across multiple days, select how many days you would like to include in the **Repeat days** dropdown.
6. **Click Next.**
7. View the summary for the segment(s) you are adding. If you would like to make sure the segments will create correctly, click **Preview**. Once you are satisfied with the changes made, click **Process**.

**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

If any of the approval types are required for your employees, you will be unable to close weeks if you have unapproved segments. To approve a segment, click on the checkbox under the appropriate header (M for Manager, E for Employee, and O for Other). To approve all the segments currently displayed for all displayed employees, click on the appropriate approval column headers.

Once the approval boxes have been checked, you can then click on the blue Apply Approval button to lock the approvals into the system, or the gray Discard Approval button to clear out the changes.

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 the 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 break. 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.
Individual Hours Essentials

The **Individual Hours** screen is where you can add, edit, and review employee hours.

On the left side of the screen, you will see a list where the first 100 employees will appear. If there are more than 100 employees then use the Page control at the top of the employee list. Specific employees can be displayed using the **Filter** button. Employees can also be filtered by typing in a name or number into the **Search** bar. Clicking the **X** button to the right of the search bar will revert the list to the previous settings.

Once you have selected an employee, their information should appear to the right. You will be able to see the employee’s name, the number of Regular, Overtime 1, and Overtime 2 hours worked, shift approvals (M, E, and O columns) and shift information
- Time in and time out
- Hour totals for each segment, shift, and week

**Adding a Segment**

1. Click on the **Add Segment** button.
2. Enter in a date and time next to **Time in**. You can use the calendar to select a date or the clock icon to enter a time as well as manually entering in those numbers.
3. If the employee is currently clocked in, check **Individual is clocked in**. If the segment has already been completed, enter a date and time next to **Time out**.
4. If there is a break or job code change after this segment, select the Break type.
5. If this is a time sheet entry, click **Time Sheet Entry**. This will enable the **Hours** field and allow you to enter in a segment length. The **Date** and **Time in** will remain as the anchor point of the shift.
6. 
7. Select the job code this segment was worked in the **Job Code** drop down.
8. If the segment was the result of a missed punch, you can signify this by selecting **Missed in punch** and/or **Missed out punch**.

Individual Hours Essentials

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Editing a Segment

In order to edit a segment already in the system:

1. Click on the segment to highlight it, then click Manage, and Edit to access the Edit Segment window. You can also double click on the segment.
2. The Time In and Time Out fields can be edited.
3. If the employee is currently clocked in, enable Individual is clocked in.
4. If you want to make the segment a time sheet entry, check Time Sheet Entry. This will enable the Hours field and allow you to enter in a segment length. The Date and Time in will remain as the anchor point of the shift. When entering leave, companies typically choose this option.
5. If rounding is enabled and you’d like to edit the actual times of the segment, check Edit actual times.
6. If you want to change the break type that follows the segment, select the appropriate option in the Break Type drop-down.
7. Select the job code this segment was worked in the Job Code drop-down.
8. If this segment is going to earn a different hourly rate than the one normally assigned to this employee, enter it into the Rate box.
9. Click Save.

Deleting a Segment

In order to delete a segment already in the system, click on the segment to highlight it, click Manage Segments, and Delete. This will bring up a prompt asking you to verify that you want to delete the segment. To delete the segment, click Ok.

In Individual Hours, you can delete multiple segments by holding down on the Ctrl key and highlighting each segment.

Approving Shifts

If approvals are set as required, you will be unable to close weeks if you have unapproved employee segments. To approve a segment, click on the checkbox under the appropriate header (M for Manager and O for Other). If the E column is missing a check then remind the employee to log in and approve his/her hours. To approve all segments currently displayed, simply click on the M or O header icon itself.

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Period Reports Essentials

The Period Reports screen is where you can create, customize, print, and save reports on your employee hours. These reports can be customized to show information on select employees, and can be printed and/or downloaded in HTML, PDF, or OpenXML formats.

Configuring and Running a Report

1. Select the report you'd like to run from the Period Reports screen (Hours > Period Reports).
2. Apply any desired Employee and Job Code Filters by clicking the respective buttons at the top of the screen.
3. Enter in the date range for the report, or select a pre-defined date range from the drop-down.
4. Click on Settings to change individual facets of the report. These settings are unique to each report. For example, if you want to remove employee social security numbers from the Complete Payroll Report 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. If you have customized the report, click Save to commit these changes and return to the Period Reports screen.
7. Click Preview to see an example report and make sure that it includes all of your criteria.
8. Click on the Download button to choose which output format you would like to download. TimeClock Plus produces three types of output:
   - 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.

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The Request Manager allows the user to view and approve any time-off requests that have been submitted by employees through either the WebClock on a Remote Data Terminal. Additionally, employee time-off requests can be manually added through this feature.

**Approving/Denying a Request**

1. Browse to Tools > Request Manager.
2. To view detailed information on a request submitted and how its approval will be handled, right-click and select Detail.
3. To approve or deny a request, right-click on any request and select either the Approval Level needed or Deny.

**Adding a Request through Request Manager**

1. Browse to Tools > Request Manager.
2. Click the Add button.
3. Select the employee you are adding the request for in the Employee field.
4. Enter the date of the time-off request, an anchor time, the amount of hours requested off, and the leave type.
5. Click Save.

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