



PayClock 2000

Time and Attendance System

Copyright © 1994 - 1997 Lathem Time Corporation. All rights reserved.

PayClock 2000
Time and Attendance Software

User's Guide

PayClock, Lathem and the Lathem logo are registered trademarks of Lathem Time Corporation. MS-DOS and Windows are registered trademarks of Microsoft Corporation. Other product names mentioned in this manual may be trademarks of their respective companies and are hereby acknowledged.

The software described in this document is furnished under a license agreement, and may be used or copied only in accordance with the terms of that agreement. It is against the law to copy the software on any medium except as specifically allowed in the license agreement. This manual is a confidential proprietary document solely for the use of Lathem customers. Information in this document is subject to change without notice and does not represent a commitment on the part of Lathem Time Corporation. No part of this manual may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording, for any purpose, without the express written permission of Lathem.

Credits

Development: Mike Bishop, Carol Gaulden, and Mike Miller

Quality Assurance: Rick Smothermon, Jim Bedinger

Documentation: Cheryl Marchbanks

Copyright © 1999 Lathem Time Corporation. All rights reserved.

Lathem Time Corporation
200 Selig Drive, SW
Atlanta, Georgia USA 30336
(800) 241-4990
www.lathem.com

Document Number: OMP29902

Contents

Welcome	1
Terminal Manager Module	1
Registering	1
What's Included.....	2
System Requirements	3
Getting Help	4
Using This Book	4
Using Online Documentation	4
Contacting Your Dealer	4
Contacting the Lathem Support Line	5
Installing	6
New Installation.....	6
Upgrading an Existing Installation	7
Starting PayClock	7
Setup	8
Password.....	8
Single Terminal Communications	9
Meals	10
Departments.....	13
<i>To Add Departments</i>	13
<i>To Edit Department Names</i>	14
<i>To Delete a Department</i>	14
Schedule Templates	16
<i>To Setup Schedule Templates</i>	16
<i>To Apply Schedule Templates</i>	17
<i>To Edit Schedule Templates</i>	17
<i>To Delete Schedule Templates</i>	18
Employees	18
<i>To Add Employees</i>	18
<i>To Edit Employees</i>	23
<i>To Delete Employees</i>	24
Badges	24
<i>To Configure Badges</i>	24
<i>To Test the Badges</i>	26
Pay Period.....	26
Overtime	27
Punches/Rounding	29

Payroll Interface.....	31
Report Preferences.....	32
Software Preferences	34
<i>To Change Data Directory</i>	34
<i>To Enable/Disable Warning Messages</i>	34
Calculation Preferences	35
Terminal Manager Setup	37
Accessing the Terminal Manager	37
Terminal Manager Basics	37
System Settings.....	38
<i>General</i>	39
<i>Security</i>	39
<i>Dial-Out</i>	40
<i>Dial-In</i>	41
<i>Modem</i>	42
<i>Log File</i>	43
<i>Time / Date</i>	44
Adding Terminals to the System.....	45
Terminal Settings.....	45
<i>General</i>	46
<i>Connection</i>	47
<i>Port Settings</i>	48
<i>Time/Date</i>	49
<i>Recovery</i>	49
RS-485 Converter Settings	50
<i>General</i>	50
<i>Connection</i>	51
<i>Port Settings</i>	52
RS-485 Terminal Properties	52
<i>General</i>	53
<i>Time/Date</i>	54
<i>Recovery</i>	54
Lathem RS485 Sync Time Device Properties.....	55
Creating an RS-485 Connection in Terminal Manager.....	55
Adding a Sync Time Device to an RS-485 Connection.....	55
Setting the Time for All Terminals and Sync Time Devices	56
Setting the Time for Sync Time Devices Only	56
Setting the Time for Sync Time Devices Using the Autopoll Manager	56
Creating Polling Schedules	57
<i>Polling Schedule Settings</i>	57
<i>General</i>	58
<i>Polling Times</i>	59
<i>Days of Week</i>	60

Deleting Polling Schedules	60
Employee to Terminal Associations	61
<i>Assigning an Employee to a Terminal</i>	61
<i>Unassigning an Employee from a Terminal</i>	62
<i>Viewing Associations</i>	62
Creating Bell Schedules	64
<i>To Create a Bell Schedule</i>	64
Basic Operation	65
Overview	65
Signing In	65
Polling	67
<i>Polling in Single Terminal Mode</i>	67
<i>Polling Using Terminal Manager</i>	67
<i>Using the Auto Poll Application</i>	68
Retrieving Polled Data	68
Editing Employee Time Cards	69
<i>To Retrieve an Employee Timecard</i>	69
<i>Time Card Symbols</i>	70
<i>To Change the Employee Sort Order</i>	71
<i>To View Daily or Pay Period Totals</i>	71
<i>To Edit Employee Information</i>	71
<i>To Delete a Transaction</i>	71
<i>To Restore a Deleted Transaction</i>	71
<i>To Add Punches for One Employee</i>	71
<i>To Add Tips for One Employee</i>	72
<i>To Add Non-Worked Hours for One Employee</i>	73
<i>To Add Department Transfers for One Employee</i>	74
Global Employee Edits	74
<i>To Add Punches to a Group of Employees</i>	74
<i>To Add Tips to a Group of Employees</i>	75
<i>To Add Non-Worked Hours to a Group of Employees</i>	77
Reporting	78
<i>To Run a Pay Period Report</i>	78
<i>Pay Period Report Types</i>	79
<i>Pay Period Report Options</i>	80
<i>To Run an Employee List Report</i>	81
<i>Employee List Report Types</i>	82
<i>Employee List Report Options</i>	82
<i>To Save a Report</i>	82
<i>To Open a Saved Report</i>	83
Exporting	84
<i>To Export Data</i>	84
<i>Standard ASCII Export File Types</i>	85

Archiving	86
<i>To Archive Data</i>	86
<i>To Retrieve an Archive</i>	87
Updating Terminal Settings	87
<i>In Single Clock Mode</i>	87
<i>Using Terminal Manager</i>	87
Advanced Operation	89
Modifying Punch Data	89
Manual Recalculation	91
Data Recovery	92
Refreshing Terminal Manager's Database	93
Synchronizing the Time and Date of Terminals	93
Frequently Asked Questions	i
Export File Formats	vi
File Extensions and Report Symbols	viii

Chapter One

Welcome

Welcome to PayClock 2000, the integrated time & attendance system designed to make payroll processing a breeze. The PayClock system consists of PayClock PC2000 Terminals and PayClock 2000 time & attendance software. By harnessing the power of your computer, the PayClock system provides extensive reporting and editing capabilities for up to 100 active employees and their punches. It does all of this in a Windows environment, which means it's easy to learn and even easier to use. As an integrated system, PayClock 2000 is a powerful partner for managing all your payroll processing needs.

Terminal Manager Module

PayClock's optional Terminal Manager Module extends the capabilities and features of the base PayClock 2000 Software. With the Terminal Manager Module, you will be able to easily setup and manage multiple PayClock terminals for collecting employee time and attendance data. These terminals can be located locally in a networked configuration or located remotely through the use of the optional internal modems on your time clock terminals. Additionally, the Terminal Manager Module allows you to have up to 250 active employees in your system, up from 100 active employees in the basic PayClock 2000 software. If you have purchased your time clock terminal with the optional Bell Ringer relay installed, the Terminal Manager Module will allow you to set up scheduled times for the bell to ring.

Added features of the Terminal Manager Module:

- Install up to 250 PayClock terminals on one system.
- Increased employee capacity from 100 to 250.
- Use local time clock terminals connected to your PC using RS-232, or networked using RS-485 communications.
- Use time clock terminals in remote locations using optional modems.
- Automatic unattended polling of terminals.
- Schedule you terminals to ring bells for signaling the start and stop times of shifts.
- An easy to use graphical user interface

Registering

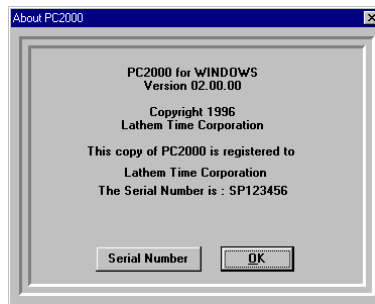
If you are not already registered, please make sure to register your software with Lathem Time Corporation before you begin your installation. Registering your software makes you eligible for technical support and allows us to inform you of any PayClock updates. You may register your software by completely filling out and mailing the postage-paid Product Registration Card that was included in your package, and installing it into your software.

To install your serial number in the PayClock software

(This can be done at any time following installation):

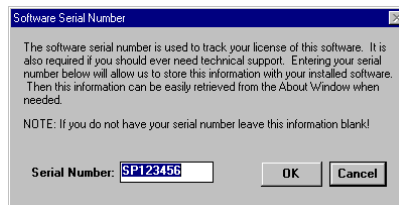
1. From the **Help** menu, choose **About**.

PayClock displays the About dialog box:



2. Select the **Serial Number** button.

PayClock displays the Software Serial Number dialog box:



3. Enter the serial number found on the outside of your software box.
4. Choose **OK**.

What's Included

Your package contains:

- This User's Guide
- Product Registration Card
- Four (4) Installation Diskettes

All of the PayClock manuals assume you are somewhat knowledgeable of Windows[®] and Windows terms. If you are not, we recommend that you familiarize yourself with them before starting PayClock.

System Requirements

To run any PayClock software, you will need:

- A computer with an 80486 or greater processor
- 8 Mbytes of RAM *
- Hard disk with at least 15 Mbytes of free space
- 1.44 Mbytes capacity 3.5" floppy diskette drive
- VGA or higher resolution display
- Mouse or other pointing device
- An available 9 or 25 pin serial communications port, or modem depending on specific installation
- MS-DOS Version 5.0 or higher
- Microsoft Windows, Version 3.11 or higher

**As with all Windows applications, more RAM will provide better performance.*

Chapter 2

Getting Help

You can obtain information about using any PayClock software application from four sources:

- The User's Guide
- On-line documentation
- The dealer where you purchased your system
- Lathem's PayClock Support Line

Using This Book

The PayClock 2000 User's Guide presents the best way to accomplish tasks you typically encounter when setting up and using your PayClock system. You can quickly find and read the information you need to accomplish your desired tasks. Detailed procedures for advanced information and processes are found in the on-line documentation.

Using Online Documentation

PayClock's on-line documentation is comprised of a comprehensive Help system. To make it easier to find information quickly, a large percentage of information is contained solely in the on-line documentation. The Help system is your comprehensive on-line reference for concepts, commands, dialog boxes and messages. If you select a command, open a dialog box, or display a message, and then start Help, you'll see help information specifically for that item. Otherwise you'll see the Help table of contents.

Start Help by choosing Contents from the Help menu. Or you can press the <F1> key at any time to display the appropriate help information.

Contacting Your Dealer

If you have a question about PayClock, first look in your User's Guide or consult the on-line Help. If you cannot find an answer, it is best to contact the Dealer that sold you your PayClock system. Your Dealer probably has the information needed to answer any question you may have. It is always best to consult your dealer before contacting the Lathem PayClock support line, since they are local and, may be better equipped to solve your problem in a timely manner.

When obtaining any technical support on a PayClock product, it is imperative that you have the following information available so that your question can be answered quickly and efficiently:

- Version and serial number of your software. This is available by choosing **A**bout from the **H**elp menu.
- Description of your computer hardware.
- The exact wording of any messages that appear on the computer screen or your time

clock terminal.

- The current text displayed on your time clock terminal.
- A description of what happened and what you were doing when the problem occurred.
- A description of how you tried to solve the problem.
- Can you recreate the problem?
- The current configuration settings. This is available by running the Configuration Report from the PayClock 2000 software.
- Details of your time clock terminal installation. This would include the model of your terminal(s), type of connection(s), cable length(s), etc.

Contacting the Lathem Support Line

If you have a question about PayClock, first look in your User's Guide or consult the on-line Help. If you cannot find an answer, it is best to contact the Dealer that sold you your PayClock system. If after all of these courses action fail to solve your problem, you can contact the Lathem PayClock Support Line. Our trained customer service technicians are available to answer any questions you may have. There may be a charge for this service depending on any maintenance contracts, service programs, or warranty contracts that are applicable at the time of your call.

Toll-free: (800) 241-4990
Hours: 7:25 A.M. - 4:25 P.M. Eastern time
Days: Monday - Friday

Chapter 3

Installing

New Installation

PayClock software is equipped with a Setup program that checks your system and asks a series of questions about how you want to install the application. The setup program also decompresses the files on your program disks so they can be opened and used on your hard disk.

To install the PayClock for Windows software

1. Start Microsoft Windows.
2. Insert Setup Disk 1 in drive A or drive B.

For Windows 3.11

3. In the Windows Program Manager, choose Run from the File menu.
4. In the Command Line box, type **a:setup** if you inserted Disk 1 in drive A, or type **b:setup** if you inserted Disk 1 in drive B.

For Windows 95

3. Choose Run under the Windows Start button
4. In the Open box, type **a:setup** if you inserted Disk 1 in drive A, or type **b:setup** if you inserted Disk 1 in drive B.
5. Choose the **OK** button



6. Follow the instructions on your screen.
7. When prompted, choose the **Typical** configuration option. The setup program leads you through the installation process and prompts you to provide information, make choices, and insert the succeeding setup disks.

8. After you run Setup, the PayClock program icons are displayed.

SAMPLE DATA: If you would like sample data for your PayClock 2000 installation, choose the Custom installation option, and select Sample Data when prompted.

Upgrading an Existing Installation

You are strongly encouraged to backup your existing PayClock for Windows application before attempting to upgrade to a newer version. For help on backing up files, consult your Windows User's Guide or seek the help of an experienced computer operator.

If you have a previous version of PayClock for Windows installed on your computer, the Setup program detects it and overwrites it with the new version. When the Setup program replaces a previous version of PayClock for Windows, it is only replacing the program files, not your current settings, employee data, or punch data. Follow the *New Installation* procedures in the previous section to upgrade your software to the latest version.

IMPORTANT! You must select the directory where your existing PayClock program and data files are located, when prompted for a destination during the installation process.

Starting PayClock

After running the setup program, you're ready to start PayClock for Windows.

To start PayClock for Windows from the Windows 3.11 Program Manager

1. Double-click the PayClock 2000 icon.



To start PayClock for Windows from Windows 95

1. Select the Start button, and then select Programs.
2. If PayClock 2000 is not on the menu, select the folder that contains the program.
3. Select the PayClock 2000 program.

Chapter 4

Setup

Before you can begin using the PayClock system, you must configure it to work with your company's specific parameters. Follow the sections below, in the order shown, to completely setup the PayClock software.

Password

Certain menu items in PayClock are password controlled. You need to enter a password to access any of these items. The default password is "**Lathem**"; However, you should change the password as soon as possible after installation to reduce the chance of unauthorized users from changing your time and attendance data.

To Change the Password

1. From the **S**etup menu, choose **P**assword.

PayClock displays the Setup Password dialog box:



2. Type the old password.

PayClock displays an asterisk for each character you type in all the fields in the Setup Password dialog box.

3. Press the <TAB> key or click in the New Password box.
4. Type the new password (up to eight characters). Press the <TAB> key.
5. Type the new password again in the Confirm New box.
6. Click the **OK** button.

The password is now changed.

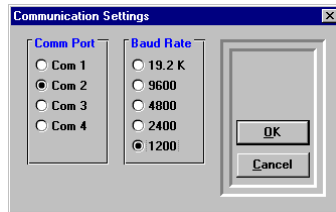
Single Terminal Communications

The basic PayClock 2000 software is designed to operate in a single terminal mode. If you are connecting more than one PC2000 terminal to your system, you will need to purchase the optional Terminal Manager Software Module which is designed to manage communications with multiple terminals. The Terminal Manager Software Module can be turned on at a later date using the Feature Purchase option located under PayClock's Help menu. If you will be utilizing the Terminal Manager Module, then skip this section and follow the instructions required to setup the Terminal Manager Module found in Chapter 5 of this book. If you will be operating in single terminal mode only, please follow these setup instructions.

To setup Single Terminal Communications Settings

1. From the **Setup** menu, choose **Preferences**.
2. From the **Preferences** Menu, choose **Communications**.

PayClock displays the Communications Settings dialog box:

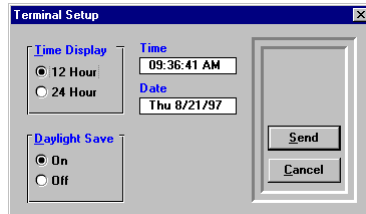


3. Choose the communications port to which you connected the PC2000 terminal via the serial cable.
4. Make sure that the Baud Rate is set to 1200 baud. This is the required baud rate for single terminal configurations.
5. Click the **OK** button.

To setup Single Terminal Properties

1. From the **Setup** menu, choose **Terminal**.

PayClock displays the Terminal Setup dialog box:



2. Choose 12-Hour or 24-Hour for the Time Display.
3. Choose On or Off for Daylight Save.

Note: If the Daylight Save option is On it will move the clock forward one hour starting the first Sunday in April and back one hour the last Sunday in October.

4. Check that the time and date displayed are accurate.

Note: You cannot change the time and date fields. These fields display the time and date from the PC. If these are incorrect, click Cancel to close the Terminal Setup dialog box. In the Main program group of the Program Manager, double click on the Control Panel icon, double click on the Date/Time icon, and use the up/down arrows to change the time and date. Click the OK button and return to PayClock.

5. If you are satisfied with your selections, click the **S**end button. Otherwise, click the **C**ancel button to close the Terminal Setup dialog box and abandon any changes.
6. After you click the **S**end button, PayClock sends the settings to the Terminal and closes the dialog box.

If you want to print the current Terminal settings, run the Configuration Report.

Meals

The Meal Rule Setup Screen provides a means to define up to 20 different meals. Meal Rules are assigned to the employees in the Employee Setup menu.

You can configure PayClock to match your company's meal rules by implementing the following features:

- Meal punches: auto-deduct, manual (employees punch in and out) or both.
- Minimum and maximum work intervals before meal punches.
- Meal length
- Minimum hours worked before eligible for meal.

To Setup Meal Punches

1. From the **S**etup menu, choose **M**eals. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Meal Rules Setup dialog box:

2. To create a new meal rule, press the **N**ew button. Next, type a unique name of up to 20 characters in the box under Meal Name. You can save up to 20 unique Meal Rules. To edit an existing Meal Rule, click the drop down box button, select the desired Meal Rule to be edited and click the **E**dit button.
3. Choose the desired Meal Length, Meal Starts Between, Auto-Deduct Meal, and Work Hours to Qualify for Auto-Deduct selections.
4. When you are satisfied with your selections, click the **S**ave button. Click the **U**ndo button to abandon any of the changes you entered.

The Meal selections are as follows:

Meal Name — The Meal Name field allows you to create different meals with corresponding rules, which may be assigned to employees (no punctuation or symbols).

Meal Length — Use the spin buttons to set your company’s meal duration in hours and minutes. The meal length must be greater than zero to enable the other meal rule selections. To disable meal rules, simply set the meal length to zero.

Example: Your company meal policy is to allow a meal of one hour in duration. Employees who punch IN more than one hour after they punch OUT for their meal will have the interval rounded based on the IN punch round rules. Employees who are OUT less that the meal length will have the interval rounded up to the meal length.

Auto Deduct Meal options

Yes, Always Deduct Meal — PayClock automatically deducts the amount of time specified in Meal Length from an employee’s time worked provided they worked the minimum number of hours to qualify for auto-deduct. Meal Starts Between setting is disabled since the employees do not need to punch OUT for the meal.

No, Employees Punch — PayClock expects four punches (two pairs of IN/OUT punches) per day from each employee. Meal Length and Meal Starts Between settings are enforced.

Both, Deduct if No Punches — PayClock deducts the amount of time specified in Meal Length from an employee's time worked only if the employee does not punch OUT for meal within the meal starts between settings. If the employee punches OUT for the meal, then Meal Length and Meal Starts Between settings are enforced.

Work Hours to Qualify for Auto-Deduct

Set the amount of time an employee must work before PayClock will deduct a meal automatically. Setting is disabled if Auto-Deduct Meal is set to no.

Note: The Work Hours to Qualify for Auto-Deduct setting cannot be less than the Meal Length setting. The employee must have satisfied the work hours to Qualify for Auto-Deduct Meal length before PayClock will deduct meal length. The minimum time the employee will have after an Auto-Deduct Meal is equal to the Work Hours to Qualify for Auto-Deduct setting.

This requirement precludes the scenario where an employee works for a short time before leaving (for example, because of illness), and deducting for lunch would leave the employee with less than zero hours worked.

Meal Starts Between options

To use the following options you must select **NO, Employees Punch** or **Both, Deduct if No Punches**.

Minimum Hours from Start — Use the spin buttons to set the minimum time, in hours and minutes, an employee must work before being allowed to punch OUT for a meal.

Maximum Hours from Start — Use the spin buttons to set the maximum time, in hours and minutes, an employee can work without punching OUT for a meal.

Example: Your company meal policy is to allow a meal to be taken between three and four hours after starting work. Employees who punch OUT for a meal either before their third hour or after their fourth hour of work will cause PayClock to generate an exception.

Note: PayClock does not round OUT punches that fall between Minimum Hours from Start and Maximum Hours from Start. However, if an OUT punch is not followed by an IN punch and another OUT punch before the employee's end of day, PayClock rounds the OUT punch as if it were an employee's end of day OUT punch.

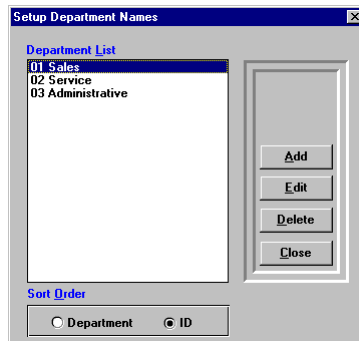
Departments

You may assign each employee a Home Department and up to two Optional Departments. There are no departments initially loaded; you should add department names before you enter employee data. You may have up to 50 departments in PayClock. Each department name can have up to 16 alphanumeric characters (no punctuation or symbols).

To Add Departments

1. From the **Setup** menu, choose **Department Names**. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

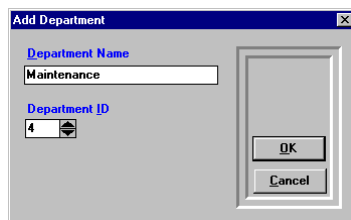
PayClock displays the Setup Department Names dialog box:



Note: You can display the departments sorted by department name or by ID number using the **Sort Order** feature shown above.

2. Click the **Add** button

PayClock displays the Add Department dialog box:



3. Type the name of the department.
4. Select the Department Number using the spin buttons. PayClock skips any numbers

already assigned to other departments.

5. Click the **OK** button.

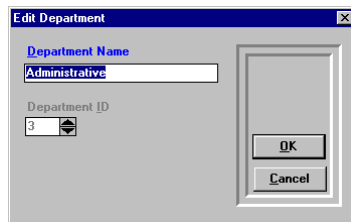
Repeat steps 2-5 for each department you want to add.

6. When you are finished entering departments, click the **Close** button. Upon closing, PayClock will ask if you wish to send changes to the Terminal.
 - a.) Click **Yes** if you are finished adding, deleting, or editing. The changes will be sent to the terminal.
 - b.) Click **No** to abort the process.
 - c.) Click **Cancel** to return to the previous screen.

To Edit Department Names

1. From the **Setup** menu, choose **Department Names**. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)
2. Highlight the department name you wish to change and click the **Edit** button.

PayClock displays the Edit Department dialog box:

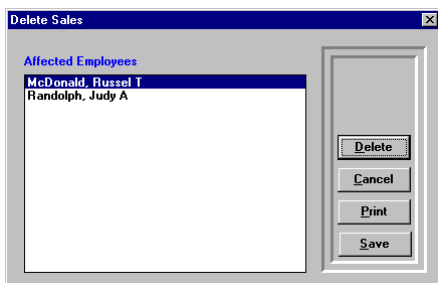


3. Edit the name and click the **OK** button.
4. Click the **Close** button.

To Delete a Department

1. From the **Setup** menu, choose **Department Names**. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)
2. Highlight the department name and click the **Delete** button.

PayClock displays the Affected Employees dialog box:

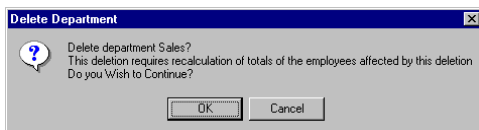


3. PayClock displays any employees currently assigned to the department. You may print this list for future reference.

Note: You have the option of printing the list of Affected Employees or saving it to a file before Deleting. Name this file when it is saved, PayClock adds the extension DPT. From PayClock you can select File then Open. Select All Files {*.DPT} in the 'List of Files of Type:' to see the choices.

4. Click the **D**elete button again to delete the department name. PayClock reassigns any employees in the department to "none".

PayClock displays the following message to remind you that additional processing time is needed for recalculation:



5. Click **OK** to continue or **Cancel** to abort.
6. Click the **C**lose button. You will be prompted to send changes to the terminal.

If you want to print the current number of departments, run the Configuration Report.

Schedule Templates

If your company has fixed work schedules or shifts, you will find the schedule template feature a very convenient way of setting or changing employee schedules. After you build a few templates to match your company's work schedules, you can apply a ready-made schedule to every employee you add or edit. PayClock allows you to create 10 Schedule Templates.

To Setup Schedule Templates

1. From the **Setup** menu, choose **Schedule Template**. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Schedule Template Setup dialog box:

Schedule	IN	OUT	HOURS
Sunday <input type="checkbox"/>			
Monday <input checked="" type="checkbox"/>	08:00 AM	05:00 PM	09:00
Tuesday <input checked="" type="checkbox"/>	08:00 AM	05:00 PM	09:00
Wednesday <input checked="" type="checkbox"/>	08:00 AM	05:00 PM	09:00
Thursday <input checked="" type="checkbox"/>	08:00 AM	05:00 PM	09:00
Friday <input checked="" type="checkbox"/>	08:00 AM	05:00 PM	09:00
Saturday <input type="checkbox"/>			

2. Click the **New** button.
3. Assign a name to your template by typing it in the Select Schedule box.
4. Click the check boxes beside the days you wish to add to the new schedule template. If you change your mind and want them removed, click the appropriate check box again.
5. Use the spin buttons to set the IN and OUT times for each day checked. Hours are calculated for you.

Note: Any deductions for meals are NOT included in the hours field.

6. Click the **Save** button to save your template. Click the **Undo** button to abandon any changes.

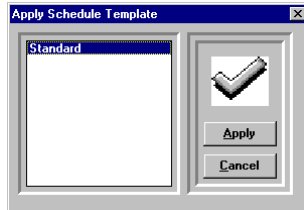
Repeat steps 2 through 6 to create additional new schedules.

7. Click the **Close** button when finished.

To Apply Schedule Templates

1. From the **S**etup menu, choose **E**mployees. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)
2. If adding a new employee, click the **N**ew button. If editing select an existing employee using the drop down list, then click the **E**dit button.
3. Select the Schedule tab by clicking on it. Click the **A**pply Template button.

PayClock displays the following dialog box:



4. Highlight the desired template and click the **A**pply button. After the template is applied the schedule can be edited.
5. If you are satisfied with the employee settings, click the **S**ave button.
6. Click the **C**lose button.

To Edit Schedule Templates

1. From the **S**etup menu, choose **S**chedule Template. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)
2. Select the schedule you wish to edit by clicking the drop list box button in the Select Schedule field.
3. Click the **E**dit button.
4. Edit any of the fields the same way you would if you were adding a template.
5. Click the **U**ndo button to abandon any changes. Click the **S**ave button to save your template.

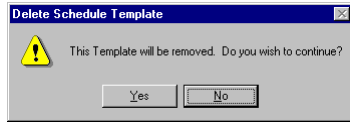
Note: Once you **S**ave a template, you cannot **U**ndo it. You must either **E**dit or **D**ele~~t~~e it

6. Click the **C**lose button when finished.

To Delete Schedule Templates

1. From the **S**etup menu, choose **S**chedule Template. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)
2. Select the schedule you wish to delete by clicking the list box button in the Select Schedule field.
3. Click the **D**el~~e~~te button.

PayClock displays the following message:



4. Click **Y**es to delete the template, **N**o to keep it.
5. Click the **C**lose button when finished.

Employees

Every employee who punches IN and OUT at the Terminal must be entered into PayClock. The employee information must also be sent to the Terminal. You assign a unique badge number between 001 and 250 to each employee, which corresponds to the badge they use to punch IN and OUT at the Terminal. Each employee entered is set to either Active or Inactive. Active means they are allowed to punch IN and OUT at the Terminal. Inactive employees are maintained in the data file but may not use the Terminal. PayClock can manage up to 250 employees, of which 100 can be Active. You may have up to 250 Active employees if you are using the optional Terminal Manager Module. Each employee can be assigned to a Home Department and up to two Optional Departments, with each department having a different pay rate if desired.

To Add Employees

Note: Please setup your schedule templates and departments prior to adding employees, see *Creating and Applying Schedule Templates*.

1. From the **S**etup menu, choose **E**mployees. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Employee Setup dialog box:

2. Click the **N**ew button. The title of the dialog box will change from Employee Setup to New Employee.
3. Enter the employee information in each field of the General tab. Press the <TAB> key to move from field to field, or click in the field in which you wish to enter information.
4. When you are satisfied with all the fields entered, click the Departments tab.

PayClock displays the New Employee dialog box, Departments tab:

5. Select the employee's Home Department and Base Pay information. Press the <TAB> key to move from field to field, or click in the field in which you wish to enter information. Repeat this step for each optional department.

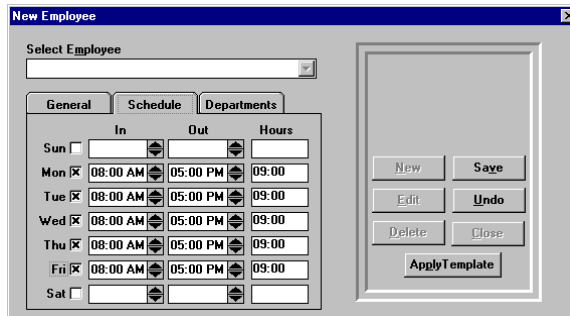
Note: You are not required to select a Home Department for the employee. If you will be using the wage reports, simply enter the appropriate value in Base Pay and leave the department selection as 'None'.

6. Choose the optional department(s) for the employee by clicking the drop down arrow beneath the **Optional Department** label. An employee is limited to two optional departments.

Note: Employee must have a Home Department other than “None” before you can add optional departments.

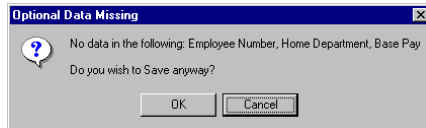
- When you are satisfied with all the fields entered, click the Schedule tab.

PayClock displays the New Employee dialog box, Schedule tab:



- Check the boxes for each day that the employee is expected to work. Use the spin buttons to set the IN and OUT times. The hours are calculated automatically.
- [Optional]** Use the Apply Template to enter a standard schedule.
- When you are satisfied with all the fields entered, click the **Save** button.

PayClock will prompt you with the following message if you do not specify a Home Department or Base Pay for an employee:



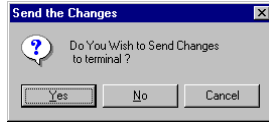
Repeat steps 2-10 for each employee you wish to enter.

- Once you have entered all the employees you wish to add, click the **Close** button.

IMPORTANT! New settings for employees and departments must be sent to the terminal before they will take effect. Please make sure to update these settings appropriately depending on the mode you are operating in.

If you are operating in single clock mode

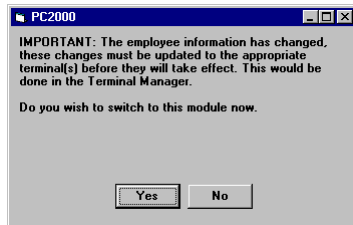
PayClock will prompt you with the following message to remind you to update your terminal:



- If you click on **Yes**, the names/data will be downloaded. If you click on **No**, the names can be downloaded at a later time. To download later, go to the **Terminal** menu, and select **Send Names/Data**.

If you are using the Terminal Manager

PayClock will prompt you with the following message to remind you to update your terminals:



- If you click on **Yes**, you will be switched to the Terminal Manager screen where you can manually Update Terminal Settings. If you click on **No**, the names can be updated at a later time using the Terminal Manager.

Note: If you previously selected “Auto Update Terminal Settings during Polling” in the System Properties of the Terminal Manager, these changes will be automatically updated in the appropriate terminals during the next polling.

By default, New Employees will be assigned to all of the terminals in your system. See Unassigning Employees in Chapter 6 for information on disallowing employee transactions on selected terminals.

The Employee fields are described as follows:

General Tab

Last Name — Enter up to 20 alphanumeric characters (no punctuation marks). The Terminal displays the first 12 characters when the employee punches IN/OUT at the Terminal. This is a required field.

First Name — Enter up to 20 alphanumeric characters (no punctuation marks). The Terminal displays the first character when the employee punches IN/OUT at the Terminal. This is an optional field.

MI — Enter one alphanumeric character (no punctuation marks) for a middle initial. The Terminal displays this character when the employee punches IN/OUT at the Terminal. This is an optional field.

Employee # — Enter up to 9 alphanumeric characters. This is an optional field you can use to cross reference PayClock with your other employee records and will be used as employee identification in Export files. This is an optional field.

Badge # — Click the up/down arrows to circulate through unassigned badge numbers. This is number of the badge the employee will use at the terminal. The badge number cannot be changed after you save the employee. PayClock defaults to the next available badge number when you enter a new employee. This is a required field.

Employee Status — Select either Active or Inactive. Active means they are allowed to punch IN/OUT at the Terminal. Inactive employees are maintained in the data file, but may not use the Terminal. PayClock can hold up to 250 employees, of which 100 can be Active in single clock mode or all 250 can be active using the Terminal Manager add-on Software Module. This is a required field.

Meal Rule — Click the drop down list box button to display available Meal Rule selections. Select the appropriate Meal Rule to be assigned to the employee. If no Meal Rule is assigned, "(none)" will appear in the drop down box.

Departments Tab

Home Department Name — Select from drop down list box. You can also type in a department name. If you enter a name that is not on the department list, you may add it with the next available department number when you save the employee. If you wish to select the department numbers, use Department Setup to add the department. This is an optional field.

Base Pay — Pay Rate when working in Home Department. Enter up to seven digits with four decimal places in the form (###.####). This is an optional field.

Optional Department Name — Name of the Optional Department to which the employee is assigned. Optional Departments cannot be entered until a valid Home Department is selected. This is a required field if selecting Optional Departments.

Pay — Pay rate for time worked in corresponding Optional Department. Enter up to seven digits with four decimal places in the form (###.####). If no Pay Rate is specified, PayClock will assume Base Pay for that Optional Department. This is a required field if selecting Optional Departments.

Schedule Tab

Day of Week — Check the box for each day of the week you expect the employee to work. The employee will appear on the Absence Report for those days that are checked but the employee has no transactions. This is an optional field.

In — The time at which an employee's IN punch is expected. The allowable range for early IN punches is adjusted in Punch Setup. The corresponding Day of Week must be selected before this field can be changed. This is a required field when you select that day for the employee's schedule.

Out — The time at which an employee's OUT punch is expected. The allowable range for late OUT punches is adjusted in Punch Setup. The corresponding Day of Week must be selected before this field can be changed. This is a required field when you select that day for the employee's schedule.

Hours — Calculated difference of Out and In fields. This field is not adjustable by the user and does not reflect time deductions for meals.

To Edit Employees

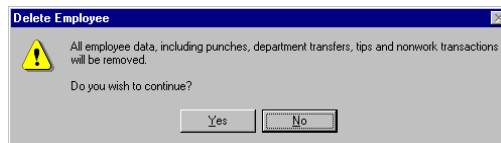
1. From the **S**etup menu, choose **E**mployees. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)
2. Use the Select Employee drop down list box to select the employee you wish to edit. PayClock retrieves the employee's information.
3. Edit any of the fields the same way you added the employee, except for badge number, which cannot be changed.
4. Click the **S**ave button to save the changes. Click the **U**ndo button to abandon changes.
5. Once you have saved the changes, click the **C**lose button. You will be prompted to send the names to the terminal.

To Delete Employees

Note: Be sure to Poll the Terminal to collect the employee's data from the Terminal before deletion.

1. From the **S**etup menu, choose **E**mployees. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)
2. Use the Select Employee drop down box to select the employee you wish to delete.
3. Click the **D**elate button.

PayClock displays the following message:



4. If you click the **Y**es button, PayClock deletes the employee and **all the employee's transactions in the active file!** There is no way to retrieve the employee's information or transactions once they are deleted. If you want to remove an employee from the Terminal but maintain the employee in the database, change the employee Status to **Inactive**.
5. Click the **C**lose button. You will be prompted to send the names to the terminal.

Badges

You assign each employee a badge and a corresponding unique Badge Number. The employee uses the badge to punch IN and OUT at the Terminal. This section is only applicable to standard PayClock badges, not Bar Code badges. Each Badge Number corresponds to a pattern of holes you punch into the badge. Each badge has a series of numbers printed next to two rows of circles.

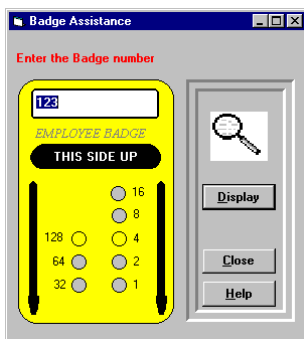
To Configure Badges

1. Write each Employee's name and assigned Badge Number on a blank badge.

Note: You can print out your Employee List Report to make this task easier! — See *To Run an Employee List Report*.

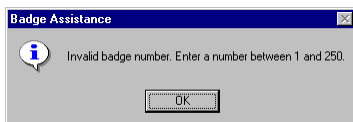
2. From the **H**elp Menu, choose **B**adge Assistance.

PayClock displays the Badge Assistance dialog box:



3. Enter the Badge Number of the badge you wish to configure.
4. Click **D**isplay PayClock displays a picture of the badge with the pattern of holes that corresponds to the particular badge number. The sum of the numbers associated with the punched holes adds up to the Badge Number.

Note: PayClock only accepts badge numbers from 1 to 250. If you enter a number outside of that range, PayClock displays the following message:



5. Use a hole punch to punch holes through the circles corresponding to the proper pattern.

Note: Be careful to punch exactly through the proper circle to ensure the Terminal will read the badge correctly.

6. Repeat steps 3 through 5 for the remaining badges to be punched (you can use the backspace key to erase the old number). When you have finished, click the **C**lose button.

Note: You should test the badges before distributing them to the employees.

To Test the Badges

This feature is not available if you are using the Terminal Manager.

1. From the **H**elp Menu, choose **B**adge Assistance.
2. Click the **T**est button.

The PayClock terminal displays “Badge Test Mode.”

3. At the terminal, insert badge and verify the Terminal displays the correct Badge Number.
4. Repeat step 3 for each badge. Re-punch any badges that have not been setup correctly. The Terminal returns to the normal time/date display 30 seconds after the last badge has been tested.

Note: After you enter test mode, you have two minutes to insert the first badge before the Terminal returns to the normal time/date display.

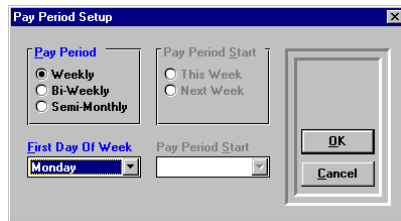
Pay Period

PayClock can be configured to calculate total work hours and gross wages for your company's pay period. Pay period options include weekly, every other week, or twice each month.

To Set up Pay Period

1. From the **S**etup menu, choose **P**ay Period. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Pay Period Setup dialog box:



2. Choose the appropriate Pay Period, First day of Week, and Pay Period Start.
3. When you are satisfied with your selections, click the **OK** button. Click the **Cancel** button to close the Pay Period Setup dialog box and abandon any of the changes you entered.

The Pay Period choices are as follows:

Pay Period - Weekly, Bi-Weekly, or Semi-Monthly.

First Day of Week - For weekly and bi-weekly pay periods, this is the first day of the pay period. For semi-monthly pay periods, it is used for calculating overtime

Pay Period Start - PayClock disables this choice if you chose a weekly pay period. If you chose a bi-weekly pay period, choose either This Week or Next Week. If you chose a semi-monthly pay period, choose from the list of Pay Period Start Dates. EM is the last day of the month.

You can print the current settings for Pay Period, First Day of Week, and Pay Period Start by running the Configuration Report.

Overtime

You can configure PayClock to match your overtime and holiday payroll rules. If you have overtime calculated both for working more than 8 hours/day and for working more than 40 hours/week (or 80 hours/bi-weekly pay period), and then PayClock can use one of two overtime calculation methods. The first is the “Regular” method, which calculates overtime based on the sum of regular hours worked only. The other method is the “Total” method, which calculates overtime based on the sum of all hours worked (including overtime, but excluding holiday, sick, vacation or other non-worked hours). The following is an example to illustrate the two calculation methods.

Example: PayClock has been setup to calculate overtime both for working more than 8 hours/day and for working more than 40 hours/week. An employee works from Monday through Thursday for 10 hours each day, giving a total of 32 regular hours and 8 overtime hours. He then works 10 hours on Friday.

Using the “**Regular**” method, the employee would need 8 more regular hours on Friday before qualifying for the hours/week overtime. Therefore, the employee ends the week with 40 hours of regular time and 10 hours of overtime.

Using the “**Total**” method, the employee has the 40 hours of total time required by the end of Thursday. Therefore, every hour worked on Friday is overtime. The employee ends the week with 32 hours of regular time and 18 hours of overtime.

To Setup Overtime

1. From the **Setup** menu, choose **Overtime**. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Overtime Setup dialog box:

2. Choose the appropriate Period and Daily Overtime, Overtime Rate, Calculation Method, and Holiday Rate.
3. When you are satisfied with your selections, click the **OK** button. Click the **Cancel** button to close the Overtime Setup dialog box and abandon any changes.

The overtime choices are as follows:

Period — Check the Period box if you want pay period overtime to be calculated. If overtime is calculated on a weekly basis check Weekly, and then enter the amount of hours to be worked in one week before overtime will take effect. If overtime is calculated on a bi-weekly basis check Bi-Weekly, and then enter the amount of hours to be worked in two weeks before overtime will take effect

Daily — Check the Daily box if you want daily overtime to be calculated, then enter the amount of hours to be worked in a day before overtime will take effect.

Rate — Choose 1.0, 1.5, or 2.0 for the overtime rate multiplier you would like used for wage calculations.

Calculation Method - If you select Period and Daily overtime, then choose how you want Pay Period overtime to be calculated; either Regular Hours or Total Hours (see examples at beginning of section).

Holiday Rate - Choose the 1.0, 1.5, or 2.0 for the worked holiday rate multiplier you would like used for wage calculations. If **worked** hours on a holiday fall into overtime, PayClock calculates the wage using the larger pay multiplier. For example, if the Overtime Rate multiplier is 1.5 and the Holiday Rate multiplier is 2.0, the overtime pay on a holiday uses the 2.0 multiplier.

Note: This rate applies only to time worked on the same day as a holiday. Non-worked holiday time is paid at the employee's regular wage rate.

You can print the current settings for Overtime, Overtime Rate, Calculation Method and Worked Holiday Rate by running the Configuration Report.

Punches/Rounding

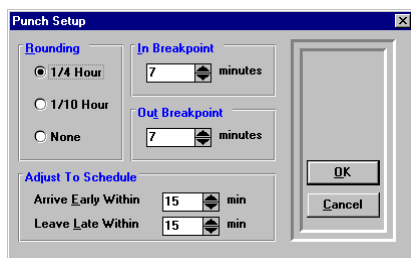
You can configure PayClock to match your company's attendance and payroll policies by implementing the following features:

- Rounding of punches.
- Separate IN and OUT rounding breakpoints.
- Adjusting IN and OUT punch times to an employee's schedule.

To Setup Rounding

1. From the **Setup** menu, choose **Punches**. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Punch Setup dialog box:



2. Choose the appropriate Rounding, Breakpoints, and Adjust to Schedule selections.
3. When you are satisfied with your selections, click the **OK** button. Click the **Cancel** button to close the dialog box and abandon any of the changes you entered.

The Rounding, Breakpoints, and Adjust to Schedule choices are as follows:

Rounding — Choose 1/4 Hour, 1/10 Hour, or None. If you choose 1/4 Hour or 1/10 Hour Rounding, you can also set the In Breakpoint and Out Breakpoint.

Note: PayClock rounds the time of each punch, (except OUT/IN punches for Meals) then calculates the interval. Exact punch times are shown on all reports, rounding will be reflected in the totals.

In Breakpoint — Set the Breakpoint within a 1/4-Hour or 1/10 Hour interval. Punches *at or greater* than this Breakpoint PayClock will round *forward*. Punches less than the Breakpoint round back.

If rounding is set to 1/4 Hour, the In Breakpoint may be set in the range 0-14 minutes. If rounding is set to 1/10 Hour, the In Breakpoint may be set in the range 0-5 minutes.

Out Breakpoint — Set the Breakpoint within a 1/4-Hour or 1/10 Hour interval. Punches *at or greater* than this Breakpoint PayClock will round *forward*. Punches less than the Breakpoint round back.

If rounding is set to 1/4 Hour, the Out Breakpoint may be set in the range 0-14 minutes. If rounding is set to 1/10 Hour, the Out Breakpoint may be set in the range 0-5 minutes.

Adjust To Schedule — for more information see *Schedule Tab on Employee Setup*.

Arrive Early Within — Set the period, in minutes, of how much time before a scheduled arrival an employee may punch IN. PayClock will calculate from scheduled start time. You may set from 0 - 1440 minutes. (The interval will be treated as if the employee punched IN at the scheduled time for the day.)

Leave Late Within — Set the period, in minutes, of how much time after a scheduled departure an employee may punch OUT. PayClock will calculate from scheduled departure time. You may set from 0 - 1440 minutes. (The interval will be treated as if the employee punched OUT at the scheduled time for the day.)

Example of Rounding: The selection of Rounding and Breakpoints effects the adjustment of punches when calculating the employee's time totals. These choices are based on company policy. When we talk of rounding time we are saying, "Here is a punch. From what point in time do you want to pay this employee?"

Conditions:

1/4 hour rounding

6 minute In Breakpoint

8 minute Out Breakpoint

In Breakpoint Rounding

In this example, any punch made at or between 0700 and 0705 (less than the 6 minute In Breakpoint) would round *back* to 0700 and is calculated from 0700.

Out Breakpoint Rounding

In this example, any punch made at or between 0408 and 0415 would round *forward* to 0415 and the employee is paid until 0415.

Note: The punch times shown on the Timecard will reflect the actual time of the punch and the totals will show the effect of the rounding.

Payroll Interface

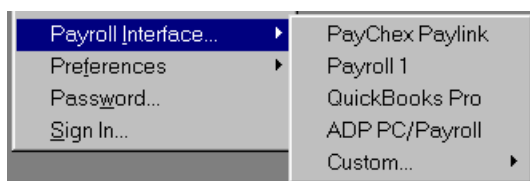
PayClock software comes standard with interfaces to some of the most common payroll software applications. New interfaces are constantly being developed, so if you don't see a Wizard for your particular payroll application, check with your dealer to see about newly available interfaces.

To Setup or Modify a Payroll Interface

Note: You must complete the Payroll Interface Wizard before the export format will be available for selection during the Export process.

1. From the **S**etup menu, choose **P**ayroll Interface.

PayClock displays available payroll export interfaces:



2. Select the desired payroll export interface.
3. From here, PayClock displays the **PayClock Payroll Export Wizard**.
4. Follow the on screen instructions to set up your payroll export. When you reach the last screen, the **N**ext button will be disabled and the **F**inish button will be enabled. If all of the information is correct, click **F**inish. If you need to make revisions, click **B**ack to make your changes.

See *Exporting Files* for instructions on how to export your time and attendance data using the Payroll Interfaces you have setup.

To Add or Remove Available Payroll Exports

During installation of the PayClock 2000 software, the Payroll Export Components window appears, which gives you the opportunity to select or deselect any or all available exports.

The Payroll Package Exports have easy to use step by step set up wizards which allow you to quickly configure PayClock 2000 for your needs. After the PayClock 2000 software has been installed, running these wizards will create an export file (filter file) which stores your information given in the wizards.

If you need to add or remove a Payroll Package Export after you have already installed your PayClock 2000 software, you can open the Payroll Export Components window at any time by clicking on the **Setup Export Components Icon**.

To add a Payroll Package Export, click on an available wizard on the left side of the screen, then click the **Add>>** button. Click **OK** to close the window. Remember, you must enter your company information in the **PayClock Payroll Export Wizard** before performing your first export.

To remove a Payroll Package Export, click on the selected wizard on the right side of the screen, then click the **<<Remove** button. If an export file has been created, you must also click on this filter file, then click the **<<Remove** button to completely remove this export capability. Click **OK** to close the window.

Report Preferences

When you run a report, you provide PayClock with the report parameters. You can change the default settings for these parameters by changing the Report Preferences. You can override any of these settings anytime you run a report. However, overriding the default settings only changes the settings for the one run of the report. The preferences revert back to their default settings for subsequent reports.

You may also use the Report Preferences to enter a report header for all your reports. You cannot change the header when you run the report. Return to Report Preferences to change the header.

To Set Report Preferences

1. From the **Setup** menu, choose **Preferences**.
2. From the **Preferences** menu, choose **Reports**. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Report Preferences dialog box:

3. Choose the Employee, Pay Period, Print Order, and Print Format defaults.
4. Type your report header in the Company Name, Address 1, Address 2, and Phone boxes. You can click in each box or press the <TAB> key to move from box to box.
5. When you are satisfied with your selections, click the **OK** button. Click the **Cancel** button to close the Report Preferences dialog box and abandon any changes.

The available Report Preference settings are as follows:

Employee — Choose All or Other. If you select Other, you are able to select which employees appear when you run the report.

Pay Period — Choose Last, This, or Other. If you select Other, you are able to select a pay period older than this or last pay period when you run the report.

Print Order - Choose Badge Number, Employee Number, or Employee Name for the order the employees appear on the report.

Print Format - Choose either 12 Hour (00-12, AM/PM) or 24 Hour (00-23, Continental) and either Minutes or Hundredths for the format in which punches appear on the report.

Print Options – Choose to Include Inactive Employees, Include Employees with Zero Hours, Insert Page Break between Departments, and/or Include Phantom Punches.

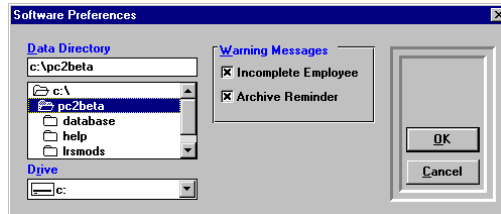
Software Preferences

You can customize PayClock to change the data subdirectory and to enable or disable various warning messages.

To Change Data Directory

1. From the **S**etup menu, choose **P**references.
2. From the **P**references menu, choose **S**oftware. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Software Preferences dialog box:



3. Use the Data Directory and Drive boxes to select the path name for the new data directory.
4. When you are satisfied with your selections, click the **O**K button. Click the **C**ancel button to close the dialog box and abandon any of the changes you entered.

PayClock copies the data files into the new data directory.

To Enable/Disable Warning Messages

1. From the **S**etup menu, choose **P**references.
2. From the **P**references menu, choose **S**oftware. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Software Preferences dialog box.

3. Click in the box next to each warning message to activate the setting.
4. When you are satisfied with your selections, click the **O**K button. Click the **C**ancel button to close the dialog box and abandon any of the changes you entered.

The different warning messages are described as follows:

Incomplete Employee - Warns of an attempt to save an employee without filling in the entire employee setup information. It may be useful to disable this message if there is an optional field that you do not use.

Archive Reminder - Reminds you to archive data when you start PayClock if more than two pay periods are stored in the active data file.

You may print the current data directory and status of warning messages by running the Configuration Report.

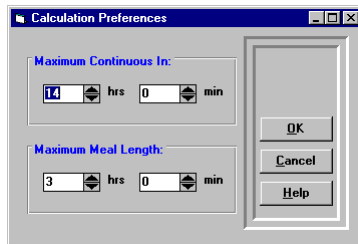
Calculation Preferences

Warning! These features are critical to all employees' worked hours calculations. Unless you are experiencing calculations problems, please do not change the value of these fields. Please consult a Lathem representative if you continue to experience calculation problems.

To change Calculation Preferences

1. From the **S**etup menu, choose **P**references.
2. From the **P**references menu, choose **C**alculations. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Calculation Preferences dialog box.



3. Enter the new settings for Maximum Continuous In and Maximum Meal Length.
4. When you are satisfied with your selections, click the **OK** button. Click the **Cancel** button to close the dialog box and abandon any of the changes you entered.

The settings for Calculation Preferences are as follows:

Maximum Continuous In

Enter the longest time that any employee is likely to be clocked in for a single shift. The Maximum Continuous In feature is used to assume a "missed punch" after a certain length of time has elapsed following an In punch. The maximum is usually 17 hours. This allows someone who normally

works a double shift, without punching for breaks and meals, to stay punched in until the end of the double shift. After the 17 hours, or whatever time frame is specified, the system assumes that there is a missed punch for that employee, and the next punch as In for the start of the next shift.

Maximum Meal Length

Enter the longest time that any employee is likely to be clocked Out for a meal. The Maximum Meal Length feature is used to assume a "missed punch" after a certain length of time has elapsed following an Out for meal punch. This value is usually 3 hours, and cannot be less than the longest possible meal break. After the 3 hours, or whatever time frame is specified, the system assumes that there is a missed punch for that employee, and records the next punch as an In.

Chapter 5

Terminal Manager Setup

The terminal manager is an optional software module designed to provide the functionality needed to manage communications with multiple PC2000 terminals. If you are only using a single PC2000 terminal you may not need to use the Terminal Manager. If you are using the PayClock software in single terminal mode you can skip this section and any further references to the Terminal Manager found in the book.

Accessing the Terminal Manager

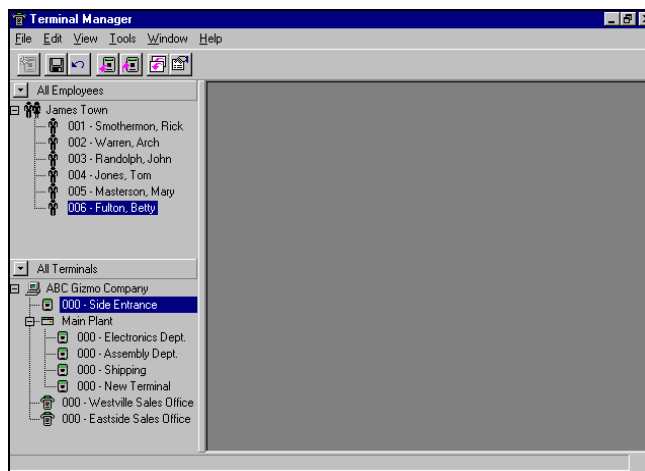
Once you have started the PayClock software, you can access the Terminal Manager Module

To access the Terminal Manager

1. Select the PayClock Setup menu
2. Select Terminals
3. Once the terminal manager is open, you may switch back and forth between PayClock and the Terminal Manager by pressing the <F9> key.

Terminal Manager Basics

The main Terminal Manager screen is the heart of all of your terminal settings and operations. This is where you will configure your system's communications settings, setup terminals, and manage polling and bell ringing processes.



The left side of the Terminal Manager consists of two panes: the *Employee Tree* and the *Terminal Tree*.

The Employee Tree contains a list of employees that have been setup in PayClock for Windows.

The Terminal Tree displays the terminals you have configured for use on your system. A plus sign next to an item implies that additional hardware is connected to it. To see the additional hardware, click the plus sign.

The Terminal Manager's *tool bar* is located beneath the menu bar. The tool bar is a convenient way to access the most common Terminal Manager functions. You can view each buttons label, by holding the mouse pointer above the tool bar button for at least one second. All of the tool bar button functions are also available from the menu bar.

The large open area on the right hand side of the screen is where dialog boxes for setting up devices and processes will be displayed. You can adjust the size of both the Employee and Terminal panes, by clicking and dragging the dividers that make up their edge of the pane.

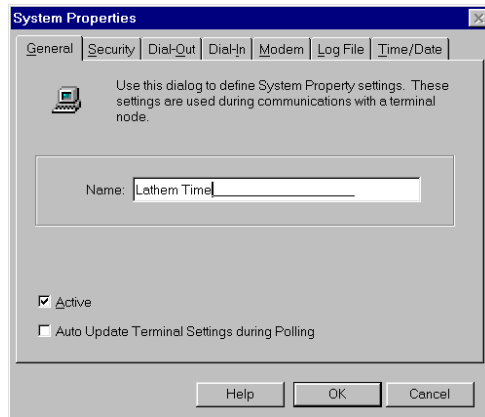
System Settings

Now that you are familiar with basic components of the Terminal Manager, you are ready to start configuring your system. The first step is to define your system properties.

System properties reflect the settings that apply to the entire application. From the System Properties dialog, you can set general properties, security properties, dial-out properties, dial-in properties, modem properties, log file properties, and time/date properties.

General

In the terminal pane, select the system object. From the File menu, choose Properties (F8) and click the General tab on the System Properties dialog box to modify any of the settings.



The following table lists the available settings.

Settings	Description
Name	Identifies the system. All printable characters are allowed. The system name cannot exceed a total of 31 characters.
Active	Determines if the system is active. Deactivating the system deactivates all terminals.
Auto Update Terminal Settings during Polling	Determines if terminal settings will automatically be updated during polling.

Security

Note: This is only used when a terminal is dialing back to the PC.

When there is an attempt to access the system from a remote location, you may require a password. It is recommended that you use a password to prevent unauthorized access to the system.

To change your system password

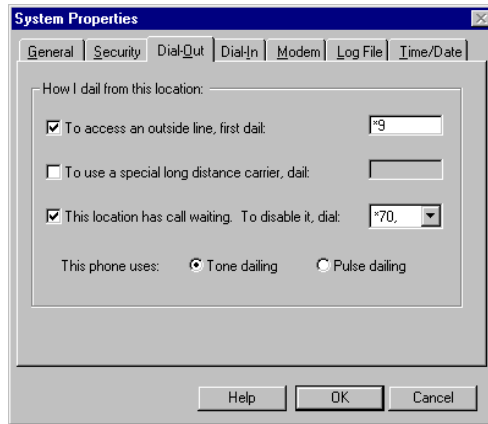
1. In the terminal pane, select the system object. From the File menu, choose Properties (F8) and click the Security tab on the System Properties dialog box.
2. Choose Set.
3. Type in the current password in the Old Password box and a new password in the New Password box. An asterisk (*) appears for each character you type.

4. In the Confirm New Password box, type your new password again. Then choose OK. Your new password takes effect immediately.

Note: You will not be able to enter anything in the Old Password box if you have not previously set a password.

Dial-Out

In the terminal pane, select the system object. From the File menu, choose Properties (F8) and click the Dial-out tab on the System Properties dialog box to modify any of the settings.

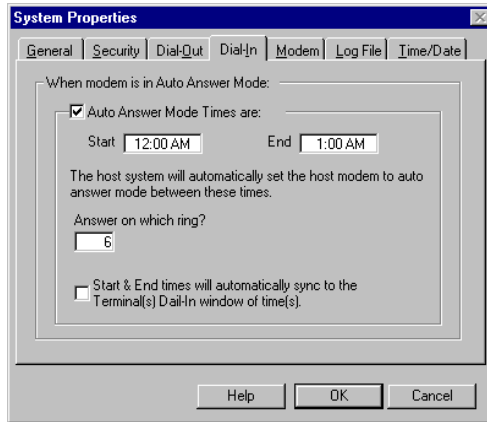


The following table lists the available settings.

Settings	Description
Outside line	The numbers required to access an outside line. If you do not have to dial any numbers to access an outside line, leave this box unchecked.
Special long distance carrier	Numbers required to access a special long distance carrier. If you do not wish to access a special long distance carrier, leave this box unchecked.
Call waiting	Specifies whether your location uses call waiting. Call waiting should be turned off while dialing from your computer. Contact your local telephone company for information about how to turn off this feature.
Dialing type	Specifies which type of dialing to use. Specify pulse dialing if this is the only type your phone line supports.

Dial-In

The system can be configured to set the modem to automatically answer incoming calls from PayClock terminals with internal modems.



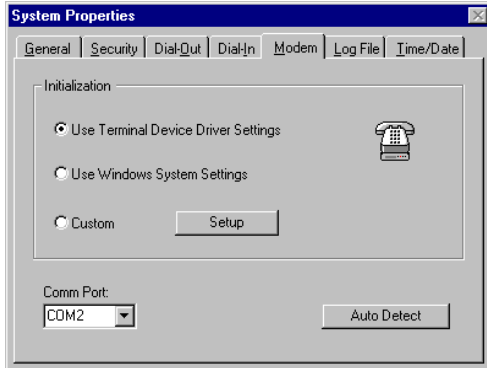
The following table lists the available settings.

Settings	Description
Auto Answer Mode Times are	Determines if auto answer mode is enabled.
Start	The host system will automatically set the host modem to start auto answer mode at this time
End	The host system will automatically set the host modem to end auto answer mode at this time
Answer on which ring?	Determines the ring on which the host modem answers
Start & End times will automatically sync to the Terminal(s) Dial in Window of time(s)	Determines if the start and end times for auto answer mode will be set using the earliest start and latest end time in the range of active remote terminals as specified in the Dial-In tab of the Terminal Properties dialog.

Modem

The modem settings under the system properties dialog represent the modem on your computer that is being used for communications with remote terminals.

In the terminal pane, select the system object. From the File menu, choose Properties (F8) and click the Modem tab on the System Properties dialog box to modify any of the settings.



The following table lists the available settings.

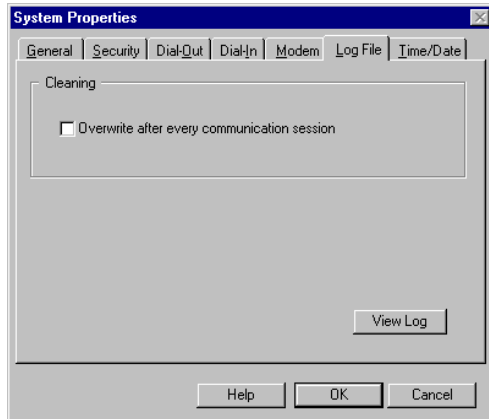
Settings	Description
Use Terminal Device Driver Settings	Determines if the modem settings used will be captured from the terminal's device driver.
Use Window System Settings	Determines if the modem settings used will be captured from Window System settings.
Comm Port	Determines the communication port used by the modem.
Custom	Determines if the modem settings used will be user defined.
Model	Model of the modem on your computer that is being used for communications with remote terminals.
Initialization	The initialization string sent to the modem to restore it to its standard operating mode. The commands may vary depending on the modem being used. Consult your modem manual for an explanation of each command in the initialization string.
Auto Detect	Automatically detects the modem being used by your computer. If more than one modem is located, you can choose from a list.

Note: If you choose to use the Windows System Settings and the settings are not found, the terminal's device driver settings will be used.

Log File

There may be times you may want to track events that happen when terminals are polled. For example, you may want to know which terminals were not successfully polled. If you have a remote terminal, you may want to know the last time it was polled. Each time a terminal is polled these types of events are written to a log file.

In the terminal pane, select the system object. From the File menu, choose Properties (F8) and click the Log File tab on the System Properties dialog box to modify any of the settings.



The following table lists the available settings.

Settings	Description
Overwrite after every communications session	Determines if the log file will be overwritten on every communication session. A communication session occurs anytime the terminal manager communicates with a terminal

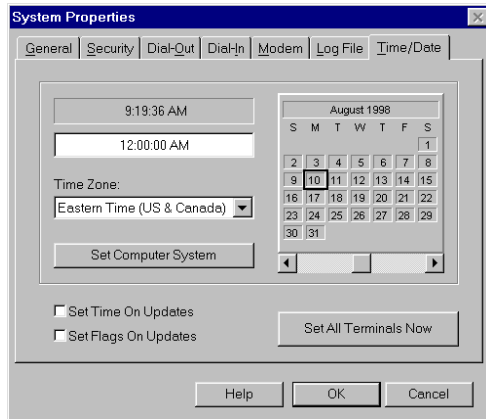
Time / Date

In the terminal pane, select the system object. From the File menu, choose Properties (F8) and click the Time/Date tab on the System Properties dialog box to modify any of the settings.

This dialog displays the time and date settings that your computer is currently using. The calendar shows the days that correspond to the selected month and year settings. The outlined date is the one your computer is using.

The Set Computer System button sets your PC's time /date settings to the settings of your choice.

Choose the Set All Terminals Now button to make all your terminals time / date settings correspond to the system.



The following table lists the available settings.

Settings	Description
Time	Time being used by your computer is indicated in the grayed box. Time to which your computer will be set is indicated in the white box.
Date	Date being used by your computer. You may select another date on the calendar. Use the scroll bar on the calendar to change months.
Time Zone	Time zone being used by your computer. Select a time zone in the list to change it.
Set Time on Updates	Checking this box will set your terminal time with your PC time when updates are made.
Set Flags on Updates	Checking this box will set your terminal flags when updates are made (24 or 12 hour display, and activate/deactivate daylight savings time).

Adding Terminals to the System

Once you have configured your system properties, you can start adding terminals to the system. To add a terminal you need to create a connection to your computer.

To create a Terminal Connection:

1. Click the System object in the terminal tree.
 2. From the **File** menu, select **New...**
 3. Under the **New...** menu, select **Connection**.
 4. In the Connection Wizard, select the type of connection you are adding, and choose **OK**.
- or*
1. Click the System object in the terminal tree.
 2. Click the **New Connection** button on the toolbar.
 3. In the Connection Wizard, select the type of connection you are adding, and choose **OK**.
- or*
1. Click on the System object in the terminal tree.
 2. Click and hold the right mouse button.
 3. Select **New...**, from the pop-up menu.
 4. Under the **New...** menu, select **Connection**.
 5. In the Connection Wizard, select the type of connection you are adding, and choose **OK**.

Terminal Settings

Once you have added a connection to the system and selected the type of terminal to install, you must configure that terminal's properties.

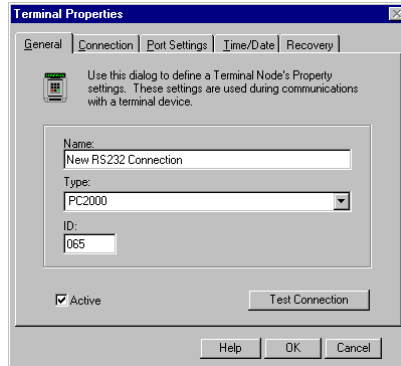
Note: Both local RS-232 terminals and remote modem terminals are configured as a single connection to your PC. Local networked terminals using RS-485 communications require you to make a connection to an RS-485 converter before adding the actual terminals. All RS-485 terminals should then be added to the RS-485 converter that they are physically connected to.

These properties define the characteristics of a specific terminal. From the Terminal Properties dialog, you can set general properties, connection properties, port settings, security properties, and terminal properties.

Note: The settings that are available will vary with connection and/or terminal type.

General

In the terminal pane, select a specific terminal. From the File menu, choose Properties (F8) and click the General tab in the Terminal Properties dialog box to modify any of the settings.



The following table lists the available settings.

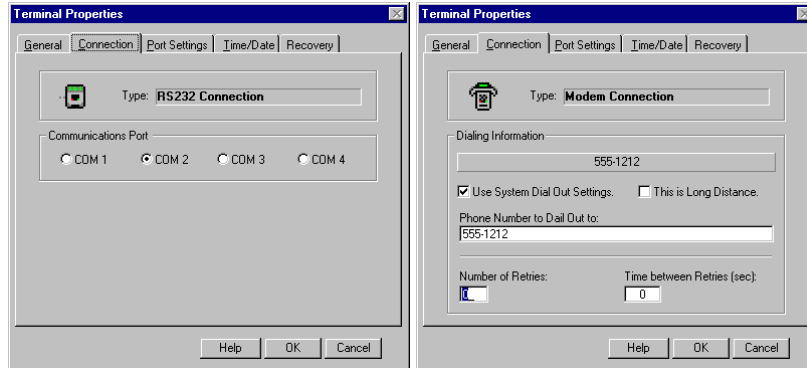
Settings	Description
Name	Identifies the terminal. All printable characters are allowed. The terminal name can not exceed a total of 31 characters.
Type	Terminal model
ID	Three digit numeric identifier. You may enter an ID or choose the Select Next ID button to automatically assign an ID. An ID must be unique.
Activate	Determines if a terminal is active. An inactive terminal will not be polled.

You may test your terminal for proper connection settings by choosing the Test Connection button.

Connection

In the terminal pane, select a specific terminal. From the File menu, choose Properties (F8) and click the Connection tab in the Terminal Properties dialog box to modify any of the settings.

This tab identifies the type of connection used for a terminal.

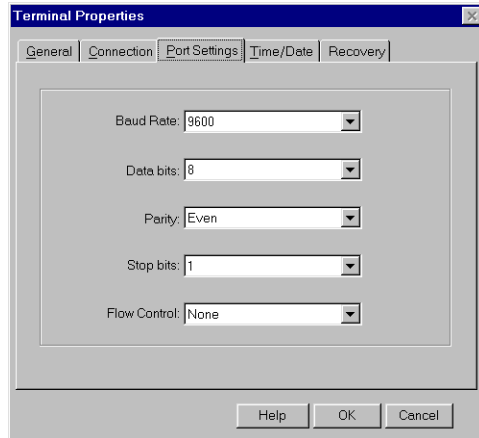


For an RS-232 connection, the user may select the PC's communication port (COM 1 -COM 4) through which the terminal will be connected. For a modem connection, the following settings are available.

Settings	Description
Use System Dial Out Settings	Determines if the system will use the settings specified in the Dial Out tab of the System Properties dialog.
This is long distance	If using the System dial out settings, determines if a special long distance carrier is used. See Dial Out in System Properties section.
Phone Number to dial out to	The phone number used to connect to a remote terminal. If you do not want to use the system dial out settings, you may include dial prefixes.
Number of retries	The number of times the system will attempt to establish a connection with the remote terminal.
Time between retries	The number of minutes the system will wait before it retries to make a connection with the remote terminal.

Port Settings

In the terminal pane, select a specific terminal. From the File menu, choose Properties (F8) and click the port Settings tab in the Terminal Properties dialog box to modify any of the settings.



The following table lists the available settings.

Settings	Description
Baud Rate	Specifies the baud rate for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Data Bits	Specifies the data bits for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Parity	Specifies the parity for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Stop Bits	Specifies the stop bits for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Flow Control	Specifies the flow control for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.

Time/Date

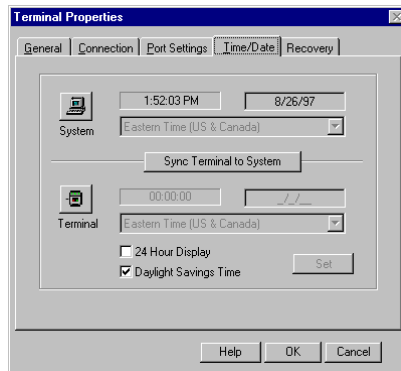
The Time/Date tab contains settings that are uploaded to the terminal.

In the terminal pane, select a terminal object. From the File menu, choose Properties (F8) and click the Time/Date tab on the Terminal Properties dialog box to modify any of the settings.

This dialog displays the time and date settings that your computer (System) is currently using.

To get the time and date of the terminal, choose the Terminal button.

Choose the Sync button, then the Set button to set your terminal's time and date settings to correspond with the system.



The following table lists the available settings.

Settings	Description
Time Zone	Time zone being used by your computer and terminal. If the terminal is a remote terminal, you may change its time zone.
24 Hour Display	This flag determines if 24-hour time format is used for displaying time at the terminal.
Daylight Savings Time	This flag determines if your terminal's clock is automatically adjusted when daylight savings time changes.

Recovery

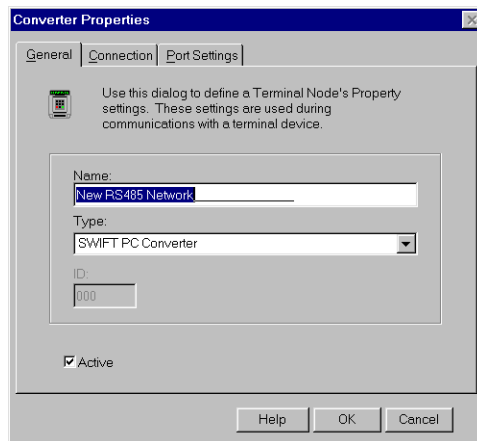
See Chapter 7: Advanced Operation.

RS-485 Converter Settings

When an RS-485 connection is created, an RS-485 converter (SWIFT-485) is displayed in the terminal pane. Multiple terminals can be connected to an RS-485 converter. The converter dictates the communication settings of terminals attached to it.

General

In the terminal pane, select a specific RS-485 converter. From the File menu, choose Properties (F8) and click the General tab in the Converter Properties dialog box to modify any of the settings.

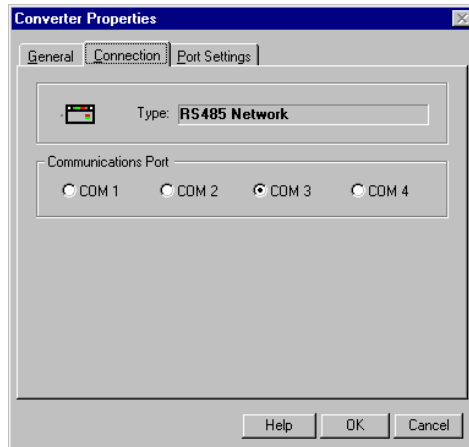


The following table lists the available settings.

Settings	Description
Name	Identifies the converter. All printable characters are allowed. The converter name can not exceed a total of 31 characters.
Type	Converter model
ID	This box is not used with converter settings and is dimmed.

Connection

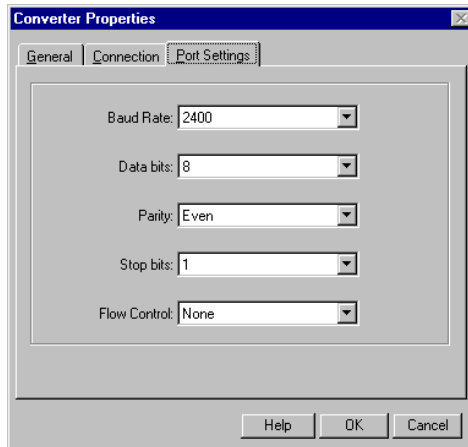
In the terminal pane, select a specific converter. From the File menu, choose Properties (F8) and click the Connection tab in the Converter Properties dialog box to modify any of the settings.



This tab identifies the type of connection supplied by the converter. The user may select the PC's communication port (COM 1 -COM 4) through which the converter will be connected.

Port Settings

In the terminal pane, select a specific converter. From the File menu, choose Properties (F8) and click the Port Settings tab in the Converter Properties dialog box to modify any of the settings.



The following table lists the available settings.

Settings	Description
Baud Rate	Specifies the baud rate for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Data Bits	Specifies the data bits for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Parity	Specifies the parity for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Stop Bits	Specifies the stop bits for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.
Flow Control	Specifies the flow control for this port. If you are not sure what the value should be, consult your hardware documentation or use the default value.

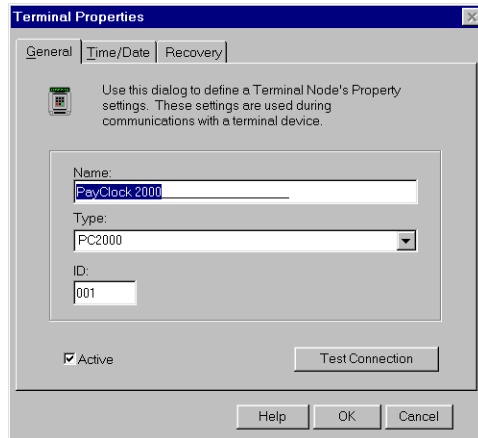
RS-485 Terminal Properties

When a terminal is connected to an RS-485 converter, you must configure that terminal's properties. These properties define the characteristics of a specific terminal. From the

Terminal Properties dialog, you can set the general properties, Time/Date properties and perform Data Recovery in the event of a terminal malfunction.

General

In the terminal pane, select a specific terminal that is in your RS-485 Network. From the File menu, choose Properties (F8) and click the General tab in the Terminal Properties dialog box to modify any of the settings.



The following table lists the available settings.

Settings	Description
Name	Identifies the terminal. All printable characters are allowed. The terminal name can not exceed a total of 31 characters.
Type	Choose the terminal model – here you may also choose a Lathem RS-485 Sync Time Device.
ID	Three digit numeric identifier. You may enter an ID or choose the Select Next ID button to automatically assign an ID. An ID must be unique. Note that a Sync Time Device does not have an ID.
Active	Determines if a terminal is active. An inactive terminal will not be polled.

You may test your terminal for proper connection settings by choosing the Test Connection button. This button does not appear when connecting a sync time device since no employee data is assigned to these devices.

Time/Date

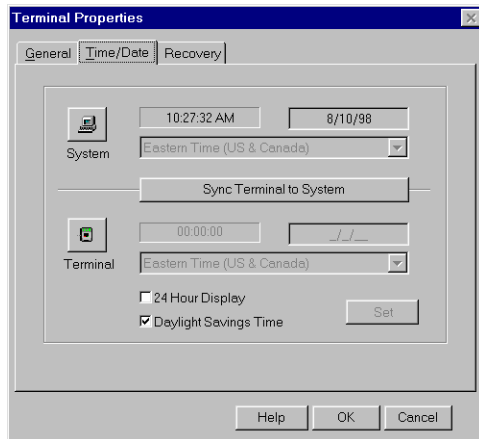
The Time/Date tab contains settings that are uploaded to the terminal.

In the terminal pane, select a terminal object. From the File menu, choose Properties (F8) and click the Time/Date tab on the Terminal Properties dialog box to modify any of the settings.

This dialog displays the time and date settings that your computer (System) is currently using.

To get the time and date of the terminal, choose the Terminal button.

Choose the Sync Terminal to System button, then the Set button to set your terminal's time and date settings to correspond with the system.



The following table lists the available settings.

Settings	Description
Time Zone	Time zone being used by your computer and terminal. If the terminal is a remote terminal, you may change its time zone.
24 Hour Display	This flag determines if 24-hour time format is used for displaying time at the terminal.
Daylight Savings Time	This flag determines if your terminal's clock is automatically adjusted when daylight savings time changes.

Recovery

See Chapter 7: Advanced Operation. Note that this tab is not available when setting Sync Time Devices since no employee data is assigned to these devices.

Lathem RS485 Sync Time Device Properties

Sync Time Devices are connected in the same manner as any other terminal. When a Sync Time Device is connected to an RS-485 converter, you must configure that device's properties. These properties define the characteristics of a specific sync time device. From the Terminal Properties dialog, you can set the General properties and Time/Date properties. Available Sync Time Devices are Digital Wall Clocks, Mini-Masters and Sonachrons.

See the previous section, RS-485 Terminal Properties, for more information on modifying the properties of these devices.

Creating an RS-485 Connection in Terminal Manager

The first step in setting up Terminal Manager for communication with sync time devices is to create connections representing your terminal network.

To create an RS-485 connection

1. Select the System icon in the terminal tree
2. From the **File** menu, click **New | Connection**
3. In the Connection Wizard dialog box, select **RS485 Network** as the type
4. Give this connection a name
5. Choose **Finish**
6. A dialog box appears with the default properties. Modify the properties if needed, then click **OK**

Adding a Sync Time Device to an RS-485 Connection

To add sync time devices to an RS-485 Network connection

1. In the terminal tree, select the RS-485 Network that you want to attach the sync time devices to
2. From the **File** menu, choose **New | Terminal**
3. Type a name for these sync time devices, choose **Lathem Sync Time Device** as the type, then click **OK**. Only one icon needs to be added for all sync time devices in a particular RS-485 connection

Setting the Time for All Terminals and Sync Time Devices

1. Select the system icon on the terminal tree
2. From the **File** menu, choose **Properties**, then click the Time/Date tab
3. Modify the time and date settings of the system if necessary
4. Click the **Set All Terminals Now** button

Setting the Time for Sync Time Devices Only

1. In the terminal tree, select the icon that represents the devices you wish to sync
2. From the **File** menu, choose **Properties**, then click the Time/Date tab
3. Click the **Sync Terminal to System** button

Setting the Time for Sync Time Devices Using the Autopoll Manager

When using polling schedules, you can set Autopoll Manager to automatically update the time at the sync time device(s). Add the sync time devices to a polling schedule, then configure the system properties to automatically update and set the time during polling. The Autopoll Manager program must be running in order to update the time automatically.

To add sync time devices to a polling schedule

1. Open the Polling Schedules window by clicking the **Polling Schedules** button
2. Choose the schedule to modify or click **New** to create a new schedule
3. Make sure the **Active** box is checked
4. Highlight the devices in the terminal tree that you want to add to the schedule
5. Click the **Add** button
6. Modify any settings under the Times and Days of Week tabs if necessary
7. Click **Save**
8. Click **Close**

To enable the auto update function

1. Open the system properties by double-clicking the system icon on the terminal tree
2. Under the General Tab, ensure the “**Auto Update Terminal Settings during Polling**” box is checked
3. Under the Time/Date Tab, check “**Set Time on Updates**”, then click **OK**

Creating Polling Schedules

As employees perform transactions at a terminal, the information is stored in the terminal's memory. The terminal must be polled in order to get the information into the PayClock 2000 software installed on your computer. When a terminal is polled, information from the terminal is transferred to PayClock's database via an established connection. You are then able to access your time and attendance data using the PayClock software. Terminal Manager simplifies the process of polling your terminals by using polling schedules.

Note: Polling schedules will only function while the Auto Poll application is running.

To create a polling schedule

1. From the **File** menu, choose **View** and select **Polling Schedules**.
2. Choose the **New** button.
3. From the General tab, enter a name for the polling schedule (max. 31 char) or use the default.
4. Choose **Save** to save the polling scheme. If you want to activate the polling schedule, select the Active box on the General tab.

Polling Schedule Settings

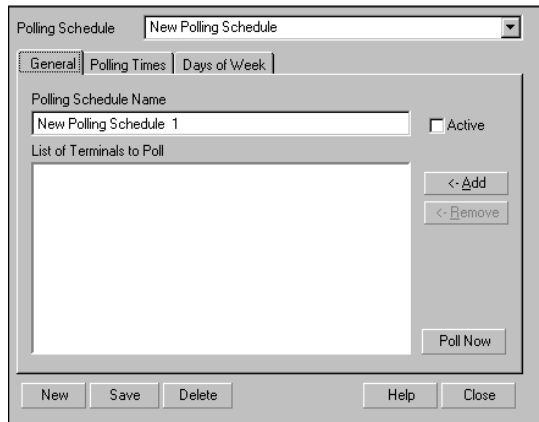
These settings define the characteristics of a polling scheme. From the Polling Schedule window, you can set general properties, polling times, and days to poll.

General

From the File menu, choose View and select Polling Schedules. Click the General tab.

In the General tab you can assign terminals to a polling scheme, activate/deactivate polling schedules, and change polling schedule names.

A polling schedule contains a list of terminals that are to be polled. You must assign the terminals you wish to be polled for the selected polling schedule.



To assign terminals to a polling schedule

1. From the polling scheme window, select the polling schedule for which you want to assign terminals.
2. From the terminal pane, select the terminals you want to assign.
3. Choose the Add button, or, drag and drop the selected terminals onto the List of Terminals to Poll box.
4. The list of terminals you have assigned will appear in the list of terminals to poll box.

To remove terminals from a polling schedule

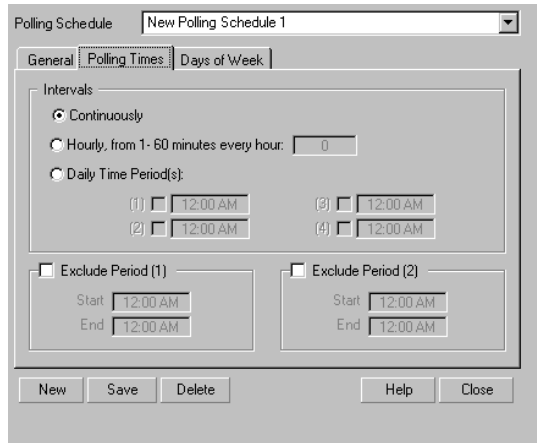
1. Select the terminals you want to remove.
2. Choose the Remove button.

To manually initiate a polling schedule

1. Select the Polling schedule you want to initiate.
2. Choose the Poll Now button.

Polling Times

From the File menu, choose View and select Polling Schedules. Click the Polling Times tab in the Polling Schemes window to modify any of the settings.



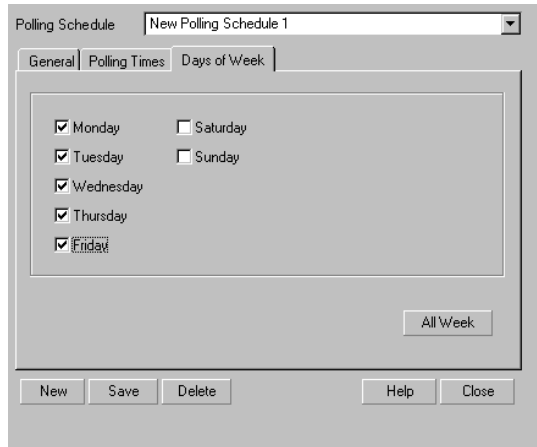
The following table lists the available settings.

Settings	Description
Continuously	Determines if data is polled continuously from terminals assigned to the polling scheme.
Hourly	Determines if polling occurs once each hour at the minute interval you specify. To make polling occur more than once each hour, add similar polling schemes, scheduling each for a different time.
Daily	Determines if polling occurs each day at specified times. You can specify up to four time periods that daily polling occurs.
Exclude Period (1)	Determines if polling does not occur at times specified in the Start and End boxes.
Exclude Period (2)	Determines if polling does not occur at times specified in the Start and end boxes.

If you modify any of the settings, choose Save to commit your changes.

Days of Week

From the File menu, choose View and select Polling Schedules. Click the Days of Week tab in the Polling Schedule window to modify any of the settings.



This tab dialog is used to determine which days the selected polling schedule will poll.

Choose the **All Week** button to select all of the days of the week.

Deleting Polling Schedules

If you want to temporarily deactivate a polling schedule, simply deselect the Active box on the General tab of the Polling Schedule window. Also, you can permanently delete a polling schedule.

To delete a polling schedule

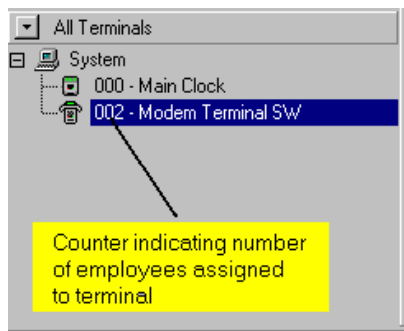
1. From the Polling Schedule window, select the polling schedule you want to delete.
2. Choose the **Delete** button.

Employee to Terminal Associations

In order to effectively manage an employee's time and attendance data, the employee needs to be associated with a terminal. This association allows PayClock to validate employee transactions at associated terminals. In a one terminal system, employee and terminal association is trivial; however, with multiple terminals the process can be more involved.

Terminal Manager provides an easy way for you to view and configure terminal and employee associations. Through the use of an intuitive and graphical interface, Terminal Manager makes associating an employee to a terminal as simple as drag and drop.

A counter to the left of a terminal in a terminal tree indicates the number of employees assigned to the terminal.



Assigning an Employee to a Terminal

In order for PayClock to validate, or allow an employee to perform transactions at a terminal, you need to assign the employee to a terminal. By default all new employees are assigned to ALL of the terminals on your system. Likewise, every time a new terminal is added, ALL of your employee's are automatically assigned to it.

To assign an employee to a terminal

1. From the Employee tree, select the employees you want to assign.
 - Do one of the following:
 - A. Using the mouse, drag and drop the employees to a terminal in the terminal tree.
 - B. In the terminal pane, select the terminals to which you want to assign the employees. From the **Tools** menu, select **Employees** and then select **Assign to Selected Terminals**.

Note: No employees are assigned to sync time devices.

Unassigning an Employee from a Terminal

When an employee is no longer associated with a terminal, you can unassign the employee from the terminal.

To remove an employee assignment

1. From the Employee Pane, select the employees you want to unassign.
2. In the terminal pane, select the terminals for which you want to unassign the employees.
3. From the **Tools** menu, select **Employees** and then select **Remove Assignment from Selected Terminals**.

Viewing Associations

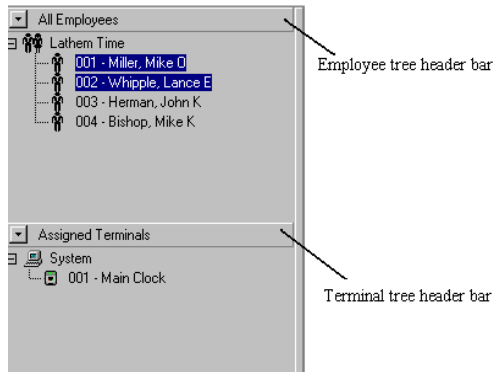
Terminal Manager provides several ways for you to view employee and terminal associations.

To view terminals assigned to selected employees

1. From the employee tree header bar, choose **All Employees**.
2. Select the employees whose terminal associations you want to view.
3. From the **View** menu, choose **Terminals** and select **Assigned to Selected Employees**.

-OR-

From the terminal pane header bar, choose **Terminals Assigned to Selected employees**.



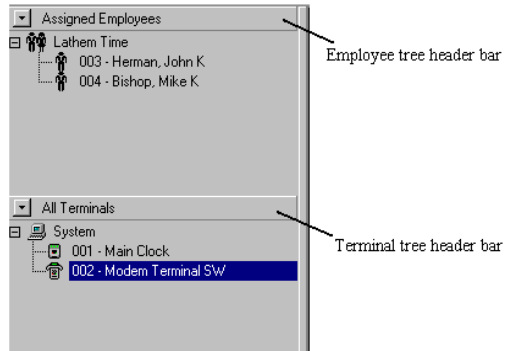
Note: If a terminal's name appears gray then one or more of the selected employees is not associated with the terminal

To View Employees Assigned to Selected Terminals

1. From the terminal tree header bar, choose **All Terminals**.
2. Select the terminals whose employee associations you want to view.
3. From the **View** menu, choose **Employees** and select **Assigned to Selected Terminals**.

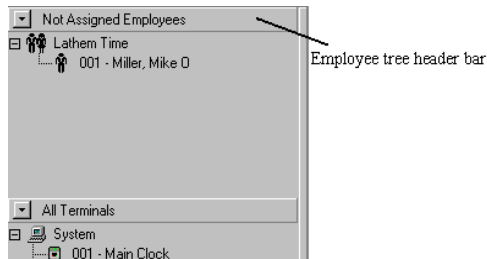
-OR-

From the employee pane header bar, choose **Employees Assigned to a Selected Terminal**.



To View Employees Not Assigned to Terminals

1. Do one of the following:
 - A. From the **View** menu, choose **Employees** and **Not Assigned to a Terminal**.
 - B. From the employee pane header bar, choose **Employees Not Assigned to a Terminal**.



Creating Bell Schedules

The Terminal Manager allows you to define bell schedules that are used to signal the start and stop of shifts and breaks. These bells are synchronized to the exact time of your PayClock terminal. In order to utilize this feature you must have a PC2000 terminal with an optional Bell Ringer Relay installed, and a connection to an external bell, buzzer or horn. This equipment requires professional installation. If you do not have the optional hardware to implement this feature, please contact your installing dealer. An authorized Lathem dealer can install these features, at your site.

To Create a Bell Schedule

1. Enter the Terminal Manager.
2. From the **Tools** menu, choose **Wizards**, then **Bell Ringer**.

PayClock displays the Bell Ringing Wizard dialog box:

3. Follow the instructions on the screen, using the navigation buttons to advance or back step through the setup process.
4. When you have completed all of the steps, press **Finish**.

After creating your Bell Schedule(s), you must send them to the appropriate terminals. See Updating Terminal Settings for more information.

Chapter 6

Basic Operation

Overview

PayClock was designed with one concept in mind... ease of use. Therefore, all of the basic functions are intuitive and simple to operate.

PayClock's basic functions should be performed at least once per pay period in the logical order, or cycle, as follows:

- 1. Polling**
- 2. Retrieving** (*Terminal Manager only*)
- 3. Editing**
- 4. Reporting**
- 5. Exporting** (*optional*)
- 6. Archiving**



The PayClock Cycle

Please review the following sections, which describe the PayClock functions you will be using on a regular basis.

Signing In

If you are going to be performing several tasks involving password controlled features, you should sign in at the Setup menu. Signing in lets you enter the password once and then have access to all password-controlled items without having to re-enter the password. When you complete your PayClock session, sign out so the next user does not have unauthorized access to the password controlled menu items.

To Sign In

1. From the **S**etup menu, choose **S**ign In. (If the menu displays **S**ign Out instead of **S**ign In, you are already signed in.)

PayClock displays the Enter Password dialog box:



2. Type in your password.
PayClock displays an asterisk for each character you type.
3. Click the **O**K button.
PayClock displays "Signed In" in the title bar.

Now when you choose a password controlled menu item you will not be asked to enter a password. Be sure to sign out when you finish your PayClock session. To sign out, choose **S**ign Out from the **S**etup menu. If you exit the program, PayClock will sign you out automatically.

Polling

As employees punch IN/OUT, add tips, or transfer between departments at the Terminal, the information is stored in the Terminal's memory. In order to get this information into the PayClock software; you must poll the Terminal. Polling the Terminal consists of transferring the information in the Terminal to PayClock's active data file via a cable or modem connection. You are then able to access and use that information for editing and reporting in the PayClock software.

Polling in Single Terminal Mode

1. From the **T**erminal menu, choose **O**btain Data.

PayClock displays the Obtain Data dialog box:

The PC initiates communication with the Terminal and starts obtaining the data. PayClock displays the status of the communication in the Obtain Data dialog box. You may click the **C**ancel button to stop the transfer at anytime without destroying any data. Once the transfer is complete, PayClock adds the new data to the active database and **erases old pay period data from the Terminal!**

When the dialog box disappears from the screen, Obtain Data is complete.

Polling Using Terminal Manager

If you have more than one terminal connected to your system, you must use Terminal Manager. Terminal Manager has two processes for polling: Manual and Automatic. Automatic polling is accomplished using the Auto-Poll application that runs the Polling Schedules that you've defined in the Terminal Manager. All other polling must be performed manually. Terminal Manager allows you to manually poll selected terminals, terminals of selected employees, and allows you to manually initiate a polling schedule.

To manually poll selected terminals

1. In the terminal tree, select the terminals you want to poll.
2. From the **T**ools menu, select **P**oll Now and then choose **S**elect Terminal(s).

To manually poll terminals of selected employees

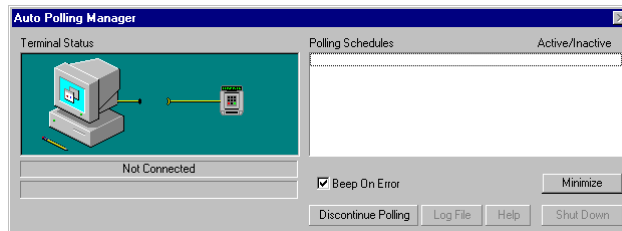
1. In the employee tree, select the employee(s) you want to poll.
2. From the **T**ools menu, select **P**oll Now and then choose **T**erminals of Selected Employee(s).

To manually initiate a polling schedule

1. From the **V**iew menu, choose **P**olling Schedule.
2. Select the Polling Schedule that you want to manually initiate.

3. From the **Tools** menu, select **Poll Now** and then **choose Selected Polling Schedule**.
-OR-
1. Choose the **Poll Now** button in the Polling Schedule window.

Using the Auto Poll Application



The Auto Poll application manages your predefined Polling Schedules. It is recommended that you place the Auto Poll program icon in your Windows Startup Program Group or Folder, so that it is launched every time your computer is restarted.

Auto Poll and the PayClock application cannot run at the same time; therefore, it is important that you close Auto Poll before launching PayClock, and then restart Auto Poll after you exit PayClock.

To start auto-poll, select the Auto-Poll Icon in your PayClock program folder. For detailed information on the Auto Poll application, please see the readme.txt file located in your PC2000 directory.

Retrieving Polled Data

This function is only required if you are using Terminal Manager. If you are using PayClock in Single Terminal Mode you should disregard this section.

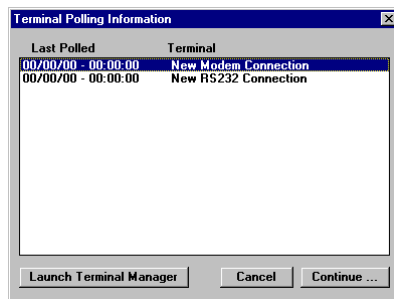
Terminal Manager stores all recently polled data into a temporary data file. This allows you to poll many terminals and then update your active PayClock data file at one time. This process of updating your active data file with recently polled data is called Retrieving. The retrieve process also performs a recalculation of employee totals ensuring accurate employee time information.

Depending upon the amount of data to be retrieved, this process could take several minutes. Therefore, it is recommended that you Retrieve Polled Data only after all of your terminals have been polled.

To Retrieve Polled Data

1. From the **File** menu, choose **Retrieve Polled Data**.

PayClock displays the Terminal Polling Information dialog box:



2. Verify that all of your terminals have been polled, if not, press the **Launch Terminal Manager** button to enter Terminal Manager where you can manually poll your terminals.
3. Press **Continue**.

PayClock retrieves and recalculates the polled data. This may take several minutes.

Note: When the PayClock application is initially started, it checks if there is any recently polled data to be retrieved, if so, you will be given the opportunity to do so at that time.

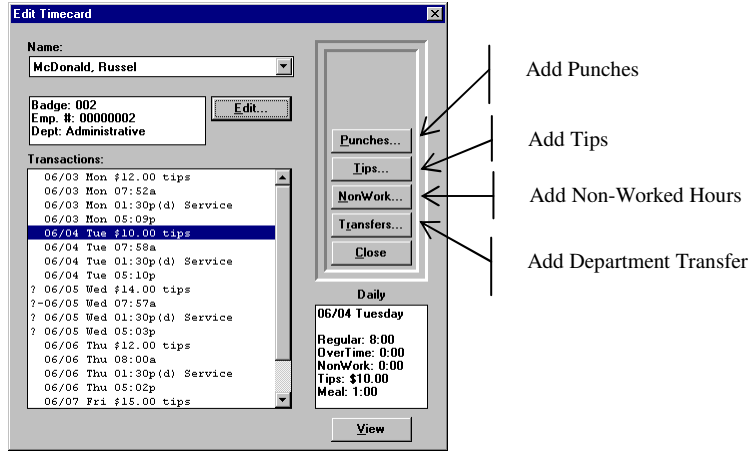
Editing Employee Time Cards

There are times when you want to edit the time card information for one or more employees. For example, you may want to add a missed punch for an employee, give an employee non-work hours for a holiday, or add tips to an employee. You can edit timecard information in PayClock either one employee at a time or for a group of employees all at once. To edit timecard information for one employee at a time, you must first retrieve the employee timecard.

To Retrieve an Employee Timecard

1. From the **Edit** menu, choose **Timecard**.

PayClock displays the Edit Timecard dialog box:



2. Use the Name drop down list box to select the employee you would like to edit. PayClock displays the timecard information for the employee selected.

Time Card Symbols

Symbol	Meaning
?	If there is a “?” next to a time, then that day has been marked as an exception — see Generating Reports, To Run a Pay Period Report for a description of exception conditions. Until the exception is corrected, total hours for that employee will not be displayed.
+	If there is a “+” next to a date, then that transaction was added from PayClock software instead of being originally entered at the Terminal.
-	If there is a “-” next to a date, then that transaction was manually deleted from the PayClock software, and is not used for calculation purposes.
(d)	If there is a “(d)” next to a time, a department transfer was added either from the Terminal keypad or from the PayClock software. The department name listed next to the (d) is the department where that employee's time is being transferred.

To Change the Employee Sort Order

The employees are listed in the order set in the **V**iew menu. To change the list order, **C**lose the dialog box and select the **V**iew menu. Choose the “Sort by” you would like. There is a check mark next to the current selection.

To View Daily or Pay Period Totals

The box in the bottom right of the screen displays the total hours and tips for the employee. Click the **V**iew button to choose whether PayClock displays daily or pay period totals in this box.

To Edit Employee Information

If you would like to change the employee information, click the **E**dit button to open the Employee Setup dialog box.

To Delete a Transaction

You may delete any of the punches, tips, non-worked hours, or department transfers by clicking on the desired line and pressing the key on your keyboard.

If you delete a punch, tip, or department transfer that was made by the employee at the Terminal, PayClock displays a “-” next to the date. The transaction is not used in calculations, but remains on the transaction list. A transaction that was added from the PayClock software is totally removed when deleted.

To Restore a Deleted Transaction

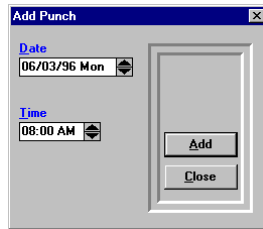
If you would like this punch restored and included in calculations, highlight the punch and press the key.

To Add Punches for One Employee

You cannot add Punches, Tips, Non-Work Hours, or Department Transfers until you have polled the Terminal and downloaded at least one punch.

1. Retrieve the employee in the Edit Timecard dialog box.
2. Click the **P**unches button. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Add Punch dialog box:



3. Select the date of the punch you wish to add. Highlight a single portion of the date and use the spin buttons to increase/decrease the highlighted portion.

Note: You may not select a date that is not already in the database.

4. Select the time of the punch. Highlight a single portion of the time and use the spin buttons to increase/decrease the time accordingly.
5. Click the **A**dd button.

PayClock displays "Record Added."

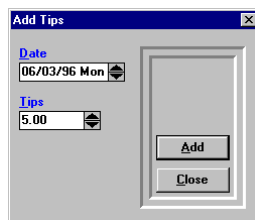
6. Repeat steps 3-5 for each punch you wish to add to the employee. When you are finished, click the **C**lose button.

PayClock closes the Add Punch dialog box and returns to the Edit Timecard dialog box.

To Add Tips for One Employee

1. Retrieve the employee in the Edit Timecard dialog box.
2. Click the **T**ips button. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Add Tips dialog box:



3. Select the date for the tip you wish to add. Highlight a single portion of the date and use the spin buttons to increase/decrease the highlighted portion.

Note: You may not select a date that is not already in the database.

4. Select the amount of the tip. Highlight a single portion of the tip amount and use the spin buttons to increase/decrease the amount accordingly.
5. Click the **A**dd button.

PayClock displays “Record Added.”

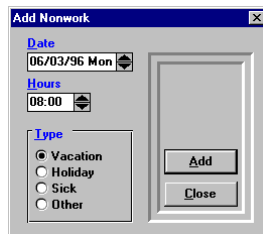
6. Repeat steps 3-5 for each tip you wish to add. When you are finished, click the **C**lose button.

PayClock closes the Add Tips dialog box and returns to the Edit Timecard dialog box.

To Add Non-Worked Hours for One Employee

1. Retrieve the employee in the Edit Timecard dialog box.
2. Click the **N**onWork button. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Add NonWork dialog box:



3. Select the date for the non-worked hours you wish to add. Highlight a single portion of the date and use the spin buttons to increase/decrease the highlighted portion.
4. Select the amount of non-worked time. Highlight a single portion of the time and use the spin buttons to increase/decrease the time accordingly.
5. Choose Vacation, Holiday, Sick or Other for the type of non-worked hours.
6. Click the **A**dd button.

PayClock displays “Record Added.”

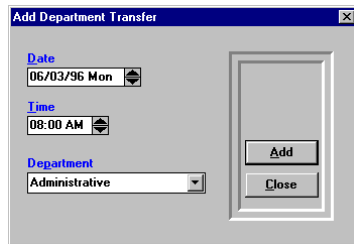
7. Repeat steps 3-6 for all the non-worked hours you wish to add. When you are finished, click the **C**lose button.

PayClock closes the Add NonWork dialog box and returns to the Edit Timecard dialog box.

To Add Department Transfers for One Employee

1. Retrieve the employee in the Edit Timecard dialog box.
2. Click the **T**ransfers button. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Add Department Transfer dialog box:



3. Select the date, time and department.
4. Click the **A**dd button.

PayClock displays "Transfer Added."

5. Repeat steps 3-4 for all the department transfers you wish to add. When you are finished, click the **C**lose button.

PayClock closes the Add Department Transfer dialog box and returns to the Edit Timecard dialog box.

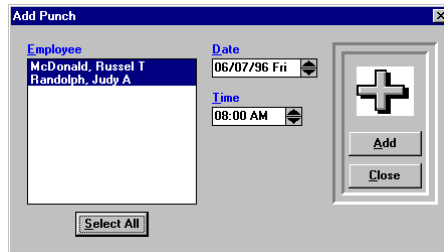
Global Employee Edits

If you need to add punches, tips or non-worked hours to more than one employee, you can use PayClock's Global Edit feature.

To Add Punches to a Group of Employees

1. From the **E**dit menu, choose **A**dd Global, **P**unches. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Add Punch dialog box:



Note: The employees are listed in the order set in the **V**iew menu. To change the list order, **C**lose the dialog box and select the **V**iew menu. Choose the “Sort by” you would like. There is a check mark next to the current selection.

2. Select the employees to whom you wish to add the punch. To select multiple employees hold down the <CTRL> key while you click on the desired employees. Select a consecutive group of employees by holding down the <SHIFT> key and clicking on the first and last employees of the consecutive group. If you want all the employees, click the **S**elect All button.
3. Select the date of the punch you wish to add. Highlight a single portion of the date and use the spin buttons to increase/decrease the highlighted portion.

Note: You may not select a date that is not already in the database.

4. Select the time of the punch. Highlight a single portion of the time and use the spin buttons to increase/decrease the time accordingly.
5. Click the **A**dd button.

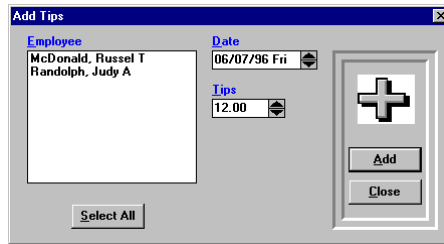
PayClock adds the indicated punch (time and date) to the highlighted employees and displays “X Records Added”, where ‘X’ is the number of records added.

6. Repeat steps 2-5 for each punch you wish to add to a group of employees. When you are finished, click the **C**lose button to close the Add Punch dialog box.

To Add Tips to a Group of Employees

1. From the **E**dit menu, choose **A**dd Global, **T**ips. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Add Tips dialog box:



Note: The employees are listed in the order set in the **V**iew menu. To change the list order, **C**lose the dialog box and select the **V**iew menu. Choose the “Sort by” you would like. There is a check mark next to the current selection.

2. Select the employees to whom you wish to add the tip. To select multiple employees hold down the <CTRL> key while you click on the desired employees. Select a consecutive group of employees by holding down the <SHIFT> key and clicking on the first and last employees of the consecutive group. If you want all the employees, click the **S**elect **A**ll button.
3. Select the date for the tip you wish to add. Highlight a single portion of the date and use the spin buttons to increase/decrease the highlighted portion.

Note: You may not select a date that is not already in the database.

4. Select the amount of the tip. Highlight a single portion of the tip amount and use the spin buttons to increase/decrease the amount accordingly.
5. Click the **A**dd button.

PayClock adds the tip to each highlighted employee and displays “X Records Added”, where ‘X’ is the number of records added.

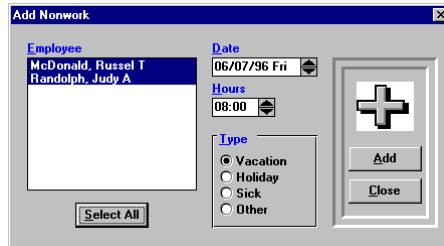
Note: If a tip already exists for an employee on the selected date, PayClock **GIVES** you the option to add to the tip, overwrite a new tip amount, or cancel and leave the previous tip unchanged.

6. Click the **O**K button.
7. Repeat steps 2-6 for each tip you wish to add to a group of employees. When you are finished, click the **C**lose button to close the Add Tips dialog box.

To Add Non-Worked Hours to a Group of Employees

1. From the **E**dit menu, choose **A**dd Global, **N**onWork Hours. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Add NonWork dialog box:



Note: The employees are listed in the order set in the **V**iew menu. To change the list order, **C**lose the dialog box and select the **V**iew menu. Choose the “Sort by” you would like. There is a check mark next to the current selection.

2. Select the employees to whom you wish to add the non-worked time. To select multiple employees hold down the <CTRL> key while you click on the desired employees. Select a consecutive group of employees by holding down the <SHIFT> key and clicking on the first and last employees of the consecutive group. If you want all the employees, click the **S**elect **A**ll button.
3. Select the date for the non-worked hours you wish to add. Highlight a single portion of the date and use the spin buttons to increase/decrease the highlighted portion.
4. Select the amount of non-worked time. Highlight a single portion of the time and use the spin buttons to increase/decrease the time accordingly.
5. Choose the type of non-worked hours (Vacation, Holiday, Sick, or Other).
6. Click the **A**dd button.

PayClock adds the non-worked hours to each highlighted employee and displays “X Records Added”, where ‘X’ is the number of records added.

7. Click the **O**K button.
8. Repeat steps 2-7 for all non-worked hours you wish to add to a group of employees. When you are finished, click the **C**lose button to close the Add NonWork dialog box.

Reporting

PayClock provides several reports to assist you in the processing of your payroll. The reports you use and how often you use them will depend on your payroll cycle. This section describes how to run the different reports and the information they contain.

The reports you will probably run the most often are the Pay Period reports. These reports contain the detailed information on the employees' punches, hours, and wages.

Note: Be sure to poll your terminals before generating reports, this will ensure that your reports display the most recent pay period data. — See *Polling the Terminal*.

To Run a Pay Period Report

1. From the **R**eports menu, choose **P**ay Period.
2. From the **P**ay Period menu, choose the type of report you would like to run (**D**etails, **T**otals, **W**ages, **A**bsence, **E**xception, **D**epartment Details, **D**epartment Totals, **T**imecard or **T**ransaction). A description of each of these reports follows.

PayClock displays a Report Setup dialog box:

3. Choose the Pay Period, Employee, Print Order, Print Format and Print Options.
4. Click the **P**review button.

PayClock displays the report in a report window. (If you selected Other for Employee or Pay Period, PayClock first displays dialog boxes to let you specify the employee(s) or period.)

5. Use the scroll bars and the **P**revious and **N**ext buttons to navigate within the report.
6. Click the **P**rint button if you would like to send the report to a printer, click the **S**ave

button if you would like to save the report to a file, or click the **Close** button to close the report window.

Note: You may print a report without previewing it by clicking the Print button instead of the Preview button in the Report Setup dialog box.

Pay Period Report Types

Details

List of employees with corresponding punches, department transfers, tips, non-worked hours, daily totals, department pay period totals and pay period totals. If rounding is in effect, the punches reflect the actual time of the punch and the totals reflect the applied rounding.

Totals

Same as Details but without the list of punches. Includes daily and pay period totals of worked hours, tips, and non-worked hours.

Wages

Same as Totals but with an additional column for gross pay. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

Absence

List of selected employees with absences and the dates for which they are scheduled and have no punches or non-worked hours.

Exception

List of employees with exceptions. These exceptions may include; punches, department transfers, tips and non-worked hours (for the date with the exceptions). The following will be considered exceptions and will cause “?” for the whole day.

Missing Punch Exceptions

Odd number of IN/OUT punches, (except if last punch is across midnight, but still within the maximum 14 hours — see *Punches/Rounding*),
Interval between IN/OUT punches greater than Maximum hours.

Meal Rule Exceptions — see *Punches/Rounding, To Setup Meal Punches, Meal Starts Between options and Auto Deduct Meal options.*

‘Auto-Deduct Meal’ option NO is selected (Employees Punch for meal), **and** no OUT punch for a meal is within the range chosen in ‘Minimum/Maximum Hours From Start’.
‘Auto-Deduct Meal’ option NO is selected, **and** an IN punch for a meal does not fall within the selected ‘Meal Length’ duration after an OUT punch that is within the ‘Meal Starts Between’ limits.

'Auto-Deduct Meal' option BOTH is selected (Deduct if No Punches for meal) **and** no meal is taken within the 'Meal Starts Between' limits **and** the employee does not have enough 'Work Hours to Qualify For Auto-Deduct'.

Department Transfer exceptions

Prior to the first IN punch of the day
After the last OUT punch of the day
Between a valid OUT/IN punch pair

Department Details

List of departments with employee totals, tips and non-worked hours, and department totals, tips and non-worked hours for the pay period.

Department Totals

List of departments with department totals, tips and non-worked hours for the pay period.

Timecard

List of employees with punch activity, tips, non-worked and meal hours for the pay period. There is also a signature line for the employee to verify the punch and totals data.

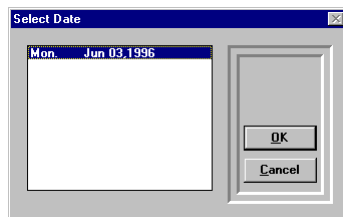
Transaction

List of employees with corresponding punches department transfers, tips, and non-worked hours for the pay period, similar to the display on the Edit Timecard screen.

Pay Period Report Options

Pay Period

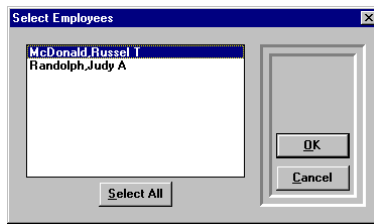
Choose Last, This, or Other then Preview or Print. If you choose Other, PayClock displays the Select Dates dialog box when you run the report:



Select the date for the Pay Period you want from the list in the dialog box. Click the **OK** button.

Employee

Choose All or Other. If you chose Other, PayClock displays the Select Employees box when you run the report:



Select the employees you wish to include in the report. To select multiple employees hold down the <CTRL> key while you click on the desired employees. Select a consecutive group of employees by holding down the <SHIFT> key and clicking on the first and last employees of the consecutive group. If you want all the employees, click the **Select All** button. When you are done selecting employees, click the **OK** button.

Print Order

Choose Badge Number, Employee Number or Employee Name for the order the employees appear on the report.

Print Format

Choose either 12 Hour (00-12, AM/PM) or 24 Hour (00-23, Continental) and either Minutes or Hundredths for the format in which punches appear on the report.

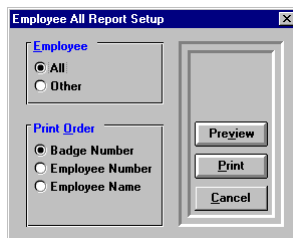
Print Options

Choose to Include Inactive Employees, Include Employees with Zero Hours, Insert Page Break between Departments, and/or Include Phantom Punches.

To Run an Employee List Report

1. From the **Reports** menu, choose **Employee List**.
2. Choose the type of report you would like to run (**All**, **In**, or **Out**). See below for a description of each of the reports.

PayClock displays the Report Setup dialog box:



3. Choose the Employee and Print Order.

4. Click the **P**review button.

PayClock displays the report in a report window. (If you selected Other for Employee, PayClock first displays a dialog box to let you specify the employee(s) to appear on the report.) Use the scroll bars and the **P**revious and **N**ext buttons to navigate within the report.

5. Click the **P**rint button if you would like to send the report to a printer, or click the **S**ave button if you would like to save the report to a file.

Note: You may print a report without previewing it by clicking the Print button instead of the Preview button in the Report Setup dialog box.

Employee List Report Types

All

list of all employees in the data file including name, employee number, badge number, status, departments, schedule (if assigned) and wage rate (if you have signed in).

In

list of employees who currently have an IN status (polls the terminal first). This report is not available if you are using the Terminal Manager.

Out

list of employees who currently have an OUT status (polls the terminal first). This report is not available if you are using the Terminal Manager.

Employee List Report Options

Employee

Choose All or Other. If you chose Other, PayClock displays the Select Employees box when you run the report. See previous section on Pay Period reports for information on selecting the employees.

Print Order

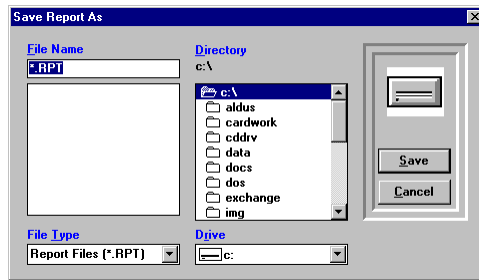
Choose Badge Number, Employee Number or Employee Name for the order the employees appear on the report.

To Save a Report

1. Select the report settings as shown in steps 1-3 of *To Run a Pay Period Report* or *To Run an Employee Report*.

2. Click the **P**review button to open the report in a report window.
3. Click the **S**ave button.

PayClock displays the Save As dialog box:



4. Enter the file name and path you would like to give the report.
5. Click the **S**ave button.

PayClock saves the report under the file name.

To Open a Saved Report

1. To retrieve a saved report, from the **F**ile menu choose **O**pen and select the filename. PayClock DISPLAYS the report in a report window.

PayClock allows you to have multiple report windows opened at the same time.

To stack all the open windows so that you can see the title bar of each window, from the **W**indow menu, choose **C**ascade.

To place all the open windows side-by-side, from the **W**indow menu, choose **T**ile.

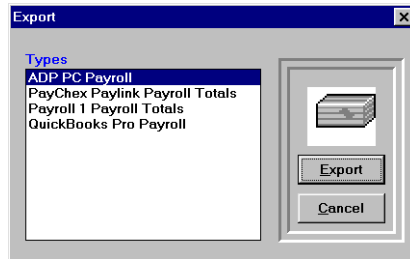
Exporting

The export feature allows you to produce files for interfacing with other applications.

To Export Data

1. From the **F**ile menu, choose **E**xport.

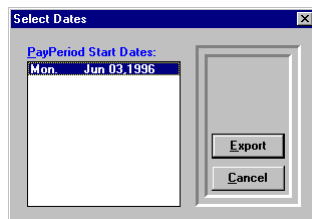
PayClock displays the Export dialog box:



Note: If you would like to use a standard payroll interface (i.e.- Paychex, ADP, etc.), you must first configure it using the Payroll Interface Setup Wizard. Only after an interface has been configured, will it become an available choice in the Format drop down list box.

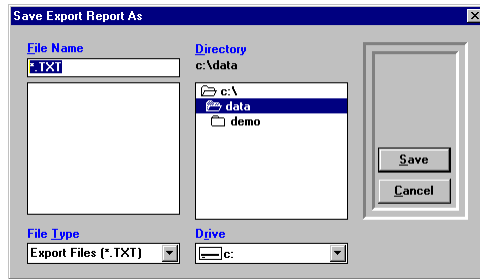
2. Select the type of export you wish to create from the Types box.
3. Click the **E**xport button.

PayClock displays the Select Dates dialog box:



4. Select the pay period you wish to export.
5. Click the **E**xport button.

PayClock displays the Save As dialog box:



6. Enter the name and path you want to give the export file.

Note: This box only displays when exporting ASCII files.

7. Click the **S**ave button when finished.
PayClock FOR WINDOWS displays “Process Complete.”
8. Click the **O**K button.

Standard ASCII Export File Types

Note: Some file formats only allow certain data to be exported.

Payroll Totals

Lists total worked hours, non-worked hours and tips information by employee.

Payroll Totals / Wages

Functions the same as Payroll Totals except it includes wage information and is password controlled; you either have to enter the password or be signed in to have access.

Employee List

Lists name, badge number, employee number and departments by employee.

Employee List / Wages

Functions the same as Employee list except includes wage rate and is password controlled; you either have to enter the password or be signed in to have access.

Archiving

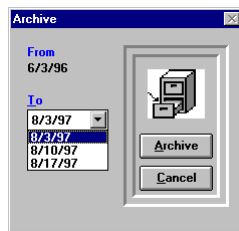
You can preserve valuable records and increase the processing speed of PayClock BY periodically archiving records from the active data file. Archiving copies the selected records to an archive file and then removes those records from the active data file. Once records have been archived, the archive file can be opened to view the records or run reports, but the archived records cannot be edited.

It is recommended that you archive when more than two pay periods are in the active file. If you do not, PayClock may not be able to fully display certain data windows, and overall software performance slows down.

To Archive Data

1. From the **File** menu, choose **A**rchive. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.) You must have at least two pay periods before you can archive.

PayClock displays the Archive dialog box:



2. Select the “To” date of the range of data you wish to archive from the drop down list box.

Note: The “From” date is the oldest date in the file and cannot be changed. The “To” date is the pay period end date. You cannot archive data in This or Last pay period.

3. Click the **A**rchive button.

PayClock DISPLAYS the Save As dialog box.

4. Enter the name and path you would like to give the archived file. Click the **S**ave button when finished.

PayClock displays “Archive complete.”

5. Click the **O**K button.

To Retrieve an Archive

1. From the **F**ile menu, choose **O**pen.
PayClock displays the Open dialog box:
2. Select the file you want to retrieve.
3. Click the **O**pen button.

Note: You may only open one archive file at a time. The archive file cannot be modified. You cannot poll the Terminal or perform any other action that would change the archived database until you close the archive file and restore the active data file. To close the archive file, choose **C**lose from the **F**ile menu. Closing the archive file automatically restores the active data file.

Updating Terminal Settings

After you make changes to a terminal's settings, employee associations, employee departments, department names, or bell schedules, you will need to update the terminal for the changes to take effect.

Note: If you are using Terminal Manager, you can have the Terminal Manager automatically update these settings every time a terminal is polled, by selecting the Auto Update Terminal Settings During Polling option on the General Tab of the Terminal Manager's System properties.

In Single Clock Mode

To update the terminal settings

1. From the **T**erminal menu, choose **S**end Names/Data.
PayClock displays the Send Names dialog box.
2. The PC initiates communication with the Terminal and starts sending the data. PayClock displays the status of the communication in the Send Names dialog box. You may click the **C**ancel button to stop the transfer at anytime without destroying any data.
When the dialog box disappears from the screen, Send Names/Data is complete.

Using Terminal Manager

To update settings of selected terminals

1. In the terminal tree, select the terminals you want to update.
2. From the **T**ools menu, select **U**ppdate Settings Now and then choose **S**electeD Terminals.

To update settings for terminals of selected employees

1. In the employee tree, select the employees for whose terminals you want to update.
2. From the Tools menu, select Update Settings Now, and then choose Terminals of Selected Employees.

Chapter 7

Advanced Operation

The functions described in this section are advanced operations and are not part of your routine payroll cycle. Please exercise caution when using these features as they may cause irreversible changes to your PayClock data file.

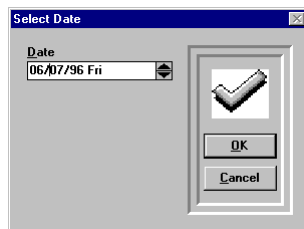
Modifying Punch Data

If employees punch IN or OUT or transfer departments on a clock where the time or date is not accurate, you can correct their times using the Modify Punches feature. *This feature is only available in single clock mode.*

To Modify Employee Punch Data

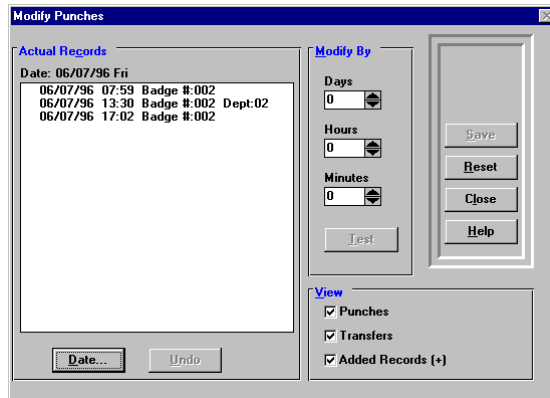
1. Select the **H**elp menu and choose **M**odify Punches. (This is a password controlled menu item; you either have to enter the password or be signed in to have access.)

PayClock displays the Select Date dialog box:



2. Select the date by highlighting the month, day, or year and clicking the spin buttons.
3. Click the **O**K button.

PayClock displays the Modify Punches dialog box:



4. If the times or dates are inaccurate, you may adjust them using the spin buttons in the **Modify By** box.
5. Highlight the records you want to modify from the list in **Actual Records**. To select multiple records hold down the <CTRL> key while you click on the desired records. Select a consecutive group of records by holding down the <SHIFT> key and clicking on the first and last record of the consecutive group.
6. Click the **T**est button to see how the record is affected. You can click the **U**ndo button to return the punch to its original time.
7. Click the **S**ave button to save the modified records to the database. If you wish to remove all modifications made since the records were obtained from the terminal (indicated by the + and - symbols), click the **R**eset button.
8. If desired, select a new date by clicking the **D**ate...button.
9. When finished, click the **C**lose button. If you have pending modifications that have not been saved, you will be prompted to save the changes.

To View the Actual Records Select your Options

Punches — Check the box to display punches made at the Terminal for the selected day. Does not display punches added by the Edit Timecard or Add Global Punches features.

Transfers — Check the box to display transfers made at the Terminal. Does not display transfers added by the Edit Timecard or Add Global Transfers features.

Added Records — Check the box to display records added by the Edit Timecard or Add Global features.

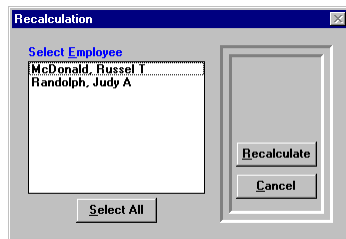
Manual Recalculation

Although the Recalculation process is a standard function of the PayClock software, the Recalculate feature is considered an advanced operation for the simple fact that you should never have to initiate it manually. PayClock's algorithms are designed to perform this process as needed so you don't have to worry about maintaining accurate employee totals. If for some reason your employee totals are not correct, or have become corrupt, you can manually initiate a recalculation to correct the problem.

To Initiate a Manual Recalculation

1. From the **File** menu, choose **Recalculate**.

PayClock displays the Recalculation dialog box:



2. Select the employees whose totals you wish to recalculate. Press the **Select All** button to choose All employees.
3. Press the **Recalculate** button.

PayClock recalculates the totals for the employees that you've selected. This may take several minutes.

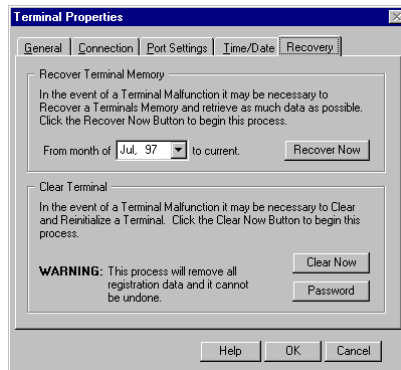
Data Recovery

In the event that your PC2000 terminal encounters an unrecoverable error condition, and you cannot poll using the standard polling process, you may need to use PayClock's enhanced Data Recovery utility. In the event of a terminal malfunction, it may also be necessary to Clear and Reinitialize your terminal. *This feature should be implemented with extreme caution.*

To Perform a Data Recovery

1. From the Terminal Manager, select the terminal whose data you wish to recover.
2. From the **File** menu, choose **Properties (F8)**.
3. Click the **Recovery** tab from the Terminal Properties dialog box.

PayClock displays the Recovery Tab:



4. Select the starting month for the data you wish to recover. Make sure to select a starting date that will not recover data that you've previously polled and/or archived.
5. Press the **Recover Now** button to begin the Recovery process.

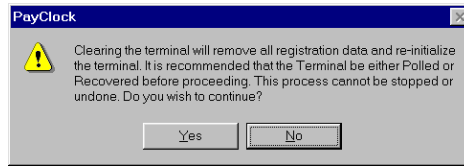
PayClock recovers as much data as possible.

To Clear and Reinitialize a Terminal

Note: This is a separately controlled, password-protected feature. The default password is "**Lathem**"; choose the Password button to change this feature's password.

1. Press the **Clear Now** button.
2. You will be prompted to enter your password. Type it, then click **OK**.

The following dialog box will be displayed:



3. It is recommended that the terminal be either Polled or Recovered before proceeding. If you are ready to continue, click **Yes**.
4. After your terminal has been reinitialized, the Terminal Communications Manager window will close and return to the Recovery tab of the Terminal Properties dialog box. Click **OK** to close this dialog box and return to the Terminal Manager main screen.

Refreshing Terminal Manager's Database

If the database between the main PayClock software, and the Terminal Manager get out of sync, it may be necessary to refresh the Terminal Manager's database. This problem is apparent when some of your employees do not appear in the Employee Tree of Terminal Manager.

To Refresh the Terminal Manager

1. From Terminal Manager's **File** menu, choose **Refresh Database**.

PayClock refreshes the Terminal Manager database with your current employee data.

Synchronizing the Time and Date of Terminals

If you have employees performing transactions at multiple terminals, it is important to make sure that the terminals' times stay synchronized. PayClock terminals are designed to remain extremely accurate, and should rarely require manual synchronization. You should only need to perform this process after initial installation, or following a hardware failure.

Note: Be extremely cautious on when you change the time and date on your terminals so that you do not affect the time registrations for your employees that already have punches in the system.

Appendix A

Frequently Asked Questions

Q: What periodic maintenance does PayClock require?

A: PayClock should run without any maintenance other than keeping the Terminal clean and cleaning the card reader occasionally. Order Lathem's OMC cleaning tool (Part # VIS0246) from your dealer to clean your card reader properly.

Q: What can I use to clean the surface of the Terminal?

A: Wipe with a dry cotton cloth only; PLEASE do not use an abrasive or chemical window cleaner.

Q: What do I do if I forget my password?

A: Contact your dealer.

Q: How can I get information about the status of the Terminal?

A: From the **T**erminal menu, choose **T**est Terminal.

Q: What should I do if the Terminal needs to be repaired?

A: Contact your dealer.

Q: If my Terminal is in a different room than my PC, is there any way I can see the Terminal time from my PC?

A: From the **T**erminal menu, choose **T**est Terminal.

- Q:** What is the problem when the Terminal flashes the message “NO RESPONSE FROM CLOCK”?
- A:** The Terminal may not be properly connected to the PC. Make sure that the Terminal is connected to the correct port, the power cable is fully engaged into the connector, and you have connected the cable to the same Comm port selected in the Communications Settings Dialog Box.
- Q:** What is happening when the Terminal flashes the message “CLOCK DISABLED LOW AC POWER”?
- A:** The AC voltage at the plug has dropped below 102 volts. Low voltage is usually caused by other devices on the same power circuit (sometimes called a “leg”) that are drawing too much current. This is basically a brownout on a smaller scale. If you have any current-hungry devices (such as electric space heaters), disconnect them and observe the clock. If the clock returns to normal, you have found the problem. You should then either relocate the clock or the other devices to another power circuit in your building.
- Q:** What happens if I lose AC power to my Terminal?
- A:** The Terminal display goes blank. You are not able to communicate with the PC, punch IN/OUT, or use the keypad at the Terminal until power is restored. The Terminal maintains the time and the data already collected.
- Q:** What happens if I lose AC power to my PC or my PC resets during calculation of Employee Totals?
- A:** In PayClock FOR WINDOWS go **File** and select **Recalculate**. The system will do the recalculation for you.
- Q:** What happens if I reinstall PayClock FOR WINDOWS software?
- A:** The system will detect that PayClock was previously installed and will provide instructions.

Q: What do I do if I get the message “Share.exe not loaded”?

A: You need to exit PayClock FOR WINDOWS and add the following line to the beginning of your autoexec.bat file:

c:\dos\share.exe /L:500 /F:4096

You must exit Windows and restart your computer for the change to be accepted. (For more information about editing your **autoexec.bat** file or the **share.exe** command, refer to your DOS user’s manual.)

Q: What do I do if the Terminal flashes the message “SYSTEM ERROR”?
What do I do if the PC displays “A problem has been detected with the Terminal Hardware”?

A: In PayClock FOR WINDOWS , choose **T**est **T**erminal from the **T**erminal menu. PayClock FOR WINDOWS tests the Terminal and displays a report. If the report contains “Hardware: Bad”, contact your dealer — see *Getting Help*.

Q: What do I do if I only have a 5.25" disk drive?

A: Contact your dealer to receive the product on 5.25" diskettes — see *Getting Help*.

Q: Why do my reports not follow the settings in the **V**iew menu?

A: **V**iew does not affect reports. Use Report Preferences to change the settings for reports. The **V**iew menu affects the way information is listed in dialog boxes and in exported files.

Q: Why, when generating reports on THIS pay period is last pay period’s data displayed?

A: PayClock determines this and last pay period by looking at the most recent data in your database, you should Obtain Data to update your database, and then re-run your reports.

Q: My mouse is on COM 1, my modem is on COM 2. To add PayClock to my PC, I added an additional I/O card; my PayClock Terminal is on COM 3. Now my mouse locks up. What gives?

A: Like to juggle? Let's look at the default COM / IRQ matrix below:

<u>COM</u>	<u>IRQ</u>
1	4
2	3
3	4
4	3

Most modems and I/O cards allow you to change IRQs — in the above scenario, the easiest change to make is to set COM3 to another IRQ (IRQ 5 is a favorite choice). Consult your modem or I/O card documentation for further instructions. Once you change the hardware, you will need to change the COM port settings in Windows.

To change the COM port settings in Windows:

1. Click the Control Panel icon, which usually resides in the Main program group.
2. Click the Ports icon.
3. Highlight the port you want to modify.
4. Click the **S**ettings... button.
5. Click the **A**dvanced... button.
6. Click the value in the **I**nterrupt Request Line (**IRQ**) box; pick your new IRQ value from the list.
7. Click the **OK** button. Click the **OK** button again.
8. Click the **C**lose button. You must restart Windows for the change to take effect.

Q: What do I do if I've lost or corrupted my database file?

A: To help protect and minimize the loss of your data each time you close PayClock software a backup copy of the database is automatically made.

Q: What do I do if either of these messages appear, "Unable to create backup... ?", or "There is not enough memory to create backup of the database..."

A: Please use File Manager's copy command to rebuild your file.

Q: What do I do if this message is displayed? “Cannot Archive File Not Found: ‘*file name* ‘ “.

A: From PayClock FOR WINDOWS installation diskette copy dbtmp1t.mdb to ‘*file name* ‘

Q: How can I improve the performance of my PC?

A: To improve performance time you can add more RAM memory, archive each pay period, keep only ‘This’ and ‘Last’ pay periods, do all the adds at one time or use the global add with a printed report of the transactions to add.

Q: I wasn't able to send employee information to the terminal from Employee Name/Data Setup. How do I get that data to the terminal?

A: Once you have identified and corrected your communication problem, select **Terminal** from the main menu, then select **Send Names/Data** from the submenu to send your data to the terminal.

Appendix B

Export File Formats

The following pages list the formats of the different export files. Commas separate each field. All times are in hours with two decimal places and all wage totals are in dollars with two implied decimal places. See *Exporting Files* for more information.

Payroll Totals (ASCII Format)

Format: Line 1: First Day of Pay Period (YY,MM,DD), number of employees following, Regular Grand Total, Overtime Grand Total, NonWork Grand Total, Tip Grand Total

Remaining Lines: Employee #, Department #, Regular Total, Overtime Total, NonWork Total, Tip Total

Note: PayClock FOR WINDOWS sorts the employees in the order set in the **View** menu.

Example:

```
95, 4, 9, 3, 12050, 0, 0, 0
"312", 1, 4000, 0, 0, 0
"312", 2, 0, 0, 0, 0
"312", 3, 0, 0, 0, 0
"313", 1, 4050, 0, 0, 0
"313", 2, 0, 0, 0, 0
"313", 3, 0, 0, 0, 0
"314", 1, 4000, 0, 0, 0
"314", 2, 0, 0, 0, 0
"314", 3, 0, 0, 0, 0
```

Payroll Totals / Wages (ASCII Format)

Format: Line 1: First Day of Pay Period (YY,MM,DD), number of employees following, Regular Grand Total, Overtime Grand Total, NonWork Grand Total, Tip Grand Total, Gross Wage Grand Total

Remaining Lines: Employee #, Department #, Regular Total, OT Total, NonWork Total, Tip Total, Gross Wage Total

Note: PayClock FOR WINDOWS sorts the employees in the order set in the **View** menu.

Example:

95, 4, 9, 3, 12050, 0, 0, 0, 106000

“312”, 1, 4000, 0, 0, 0, 36000

“312”, 2, 0, 0, 0, 0, 0

“312”, 3, 0, 0, 0, 0, 0

“313”, 1, 4050, 0, 0, 0, 38000

“313”, 2, 0, 0, 0, 0, 0

“313”, 3, 0, 0, 0, 0, 0

“314”, 1, 4000, 0, 0, 0, 32000

“314”, 2, 0, 0, 0, 0, 0

“314”, 3, 0, 0, 0, 0, 0

Employee List

Format: Last Name, First Name, Middle Initial, Employee #, Badge #, Department (three fields separated by commas representing the home department and two optional departments)

Note: PayClock FOR WINDOWS sorts the employees in the order set in the **View** menu.

Example:

“Bloom”, “Erica”, “E”, “312”, “2”, “1,5,0”

“Bouchard”, “A”, “J”, “317”, “7”, “4,0,0”

“Cohen”, “Suzanne”, “M”, “311”, “11”, “5,0,0”

Employee List / Wages

Format: Last Name, First Name, Middle Initial, Employee #, Badge #, Department (three fields separated by commas representing the home department and two optional departments), Pay Rate (s) (7 digits with 4 implied decimal places. Three fields separated by commas representing the home department rate, and two optional department rates)

Note: PayClock FOR WINDOWS sorts the employees in the order set in the **View** menu.

Example:

“Bloom”, “Erica”, “E”, “312”, “2”, “1,5,0”, “0340000,0340000,0000000”

“Bouchard”, “A”, “J”, “317”, “7”, “4,0,0”, “0230000,0000000,0000000”

“Cohen”, “Suzanne”, “M”, “311”, “11”, “5,0,0”, “0120000,0000000,0000000”

Appendix C

File Extensions and Report Symbols

The PayClock software uses several symbols in the reporting of data and exceptions. There are also specific file extensions that are used with Archive, Backup, Export and Reports.

File Extensions

.bak

Backup files;

pundatv2.bak is a file that is automatically created when PayClock FOR WINDOWS software is started. It is used in fault conditions to help restore data.

.mdb

Archive;

Archive.mdb is used to keep old employee data. When you archive pick your own file name, such as week1.mdb.

Data files;

pundatv2.mdb is the data file.

.txt

Export;

Export.txt identifies files used to export data records. When you save an export file select your own file name, such as payroll.txt.

.rpt

Report;

Report.rpt is used for reports that are created.. When you save a report choose a file name, such as details5.rpt.

Report Symbols

- + Indicates that Punches or Department Transfers were added through the software..

- Punches or Department Transfers were deleted

Note: An Audit Trail is created in the database by the + and - symbols.

- ? An exception condition of Missing Punches or Department Transfers.

- d** If there is a “d” next to a time, a department transfer was added either from the Terminal keypad or from PayClock software.

- HA** This is the employee’s *active* Home Department — see *Employees*.

- OA** This is the employee’s *active* Optional Department — see *Employees*.

- OI** This is the employee’s *inactive* Optional Department. Previously the department was active for the employee and is retained in the PayClock software

A

Absence..... 83, 84
 Absence Report..... 24
 AC voltage ii
 Active..... 41, 50, 58, 62, 65
 Actual Records..... 96
 Add Department Transfers for One Employee 79
 Add Departments 14
 Add Employees..... 19
 Add Non-Worked Hours for a Group of Employees..... 82
 Add Non-Worked Hours for One Employee ... 78
 Add Punch 80
 Add Punches for One Employee..... 76
 Add Tips for a Group of Employees 80
 Add Tips for One Employee 77
 Added Records..... 96
 All Employees..... 87
 All Week..... 65
 Always Deduct Meal..... 11
 Apply Schedule Templates 18
 Apply Template 18
 Archive ix
 Archive Data..... 92
 Archive Reminder..... 36
 Archiving 70
 Arrive Early Within 31
 Assign Terminals 63
 Assign Terminals 63
 Associations..... 67
 Auto Deduct Meal..... 11
 Auto Poll..... 73
 Set Time for Sync Time Devices Using..... 61
 Auto Update Terminal Settings..... 22
 Auto-Deduct Meal 85

B

Backup 7, iv
 Badge # 23
 Badge Assistance 25, 27
 Badge Number 25
 Badges..... 25

bak..... ix
 Base Pay..... 20, 23
 Baud Rate..... 52, 57
 Bell Ringing 38
 Bell Schedules..... 69
 Bi-Weekly 27

C

Calculation Method..... 29
 Calculation Preferences..... 36
 Calendar 47
 Call waiting 42
 Cascade. 88
 Change Data Directory..... 35
 Cleaning i
 Communication Port 51, 56
 Communications 9, 44
 Company Name 34
 Configure Badges..... 25
 Connection 48, 51, 56
 Connection Wizard 48
 Continuously 64

D

Daily..... 64
 Data Bits..... 52, 57
 Data Recovery..... 98
 Date 40, 47, 53, 59
 Day of Week 24
 Daylight Savings Time..... 53, 59
 Days of Week..... 65
 Dealer..... 4, 5
 Deduct If No Punches 12
 Delete Employees 25
 Delete Schedule Templates 19
 Department..... 83, 85
 Department Names..... 15
 Department Transfer Exceptions..... 85
 Department Transfers..... 79
 Departments 14
 Details 83, 84
 Device Driver..... 44, 45
 Dial-In..... 40, 43

Dialing type.....	42
Dial-Out.....	40, 42
DPT.....	16

E

Edit Employees.....	24
Edit Schedule Templates.....	18
Editing.....	70
Edits.....	79
Employee.....	34, 86, 87
Employee #.....	23
Employee List.....	91, vii
Employee List / Wages.....	91, vii
Employee List Report Setup.....	87
Employee Setup.....	20
Employee Status.....	23
Employee to Terminal Associations.....	66
Employees Punch.....	12
Enable/Disable Warning Messages.....	35
Exception.....	83, 84
Exclude Period.....	64
Export.....	32, ix
Export Data.....	90
Exporting.....	70, 90

F

First Day of Week.....	28
First Name.....	23
Flow Control.....	52, 57
Forget my password.....	i

G

General Properties.....	40, 48, 62
General Tab.....	20
Global.....	79

H

Hardware.....	4, 40, 52, 57
Help.....	4, 5
Hole Punch.....	26
Holiday Rate.....	29
Home Department.....	14, 20, 21, 23
Hourly.....	64

I

Icons.....	7
ID.....	50, 55, 58
In Breakpoint.....	31
IN punch.....	24
IN status.....	87
Inactive.....	25, 50, 58
Incomplete Employee.....	36
Initialization.....	44
Install.....	6, 48
Installation.....	2, 7
Installing	
New.....	6
Upgrading.....	7
Internal Modems.....	43
Interrupt Request Line.....	iv
IRQ.....	iv

L

Last Name.....	23
Lathem Support Line.....	5
Leave Late Within.....	31
Log File.....	40, 46
Long Distance Carrier.....	42, 51
Lose AC Power.....	ii

M

Manually Poll.....	72
Maximum Continuous In.....	36
Maximum Hours From Start.....	12
Maximum Meal Length.....	37
mdb.....	ix
Meal Length.....	11
Meal Name.....	11
Meal Rule Exceptions.....	84
Meal Starts Between.....	12
Meals.....	10
Menu Bar.....	40
Middle Initial.....	23
Minimum Hours From Start.....	12
Missing Punch Exceptions.....	84
Modem.....	3, 40, 43, 44, 48, 51
Modify Employee Punch Data.....	95

Modifying Punch Data	95
Month.....	47
N	
Name.....	24, 41, 50, 55, 58
Name of the Optional Department	24
Non-Worked Hours.....	82
Number of Retries.....	51
O	
Obtain Data	72
Open.....	88
Optional Department.....	20, 24
Out Breakpoint.....	31
OUT punch	24
OUT status	87
Outside Line.....	42, 43
Overtime	28, 29
Overtime Calculation Methods	28
Overtime Rate	29
P	
Parity.....	52, 57
Password.....	8, 41, 42, 98, i
Pay	24
Pay Period.....	27, 28, 34, 85
Pay period options	27
Pay Period Report	83
Pay Period Report Setup.....	85
Pay Period Start	27, 28
Pay Period Totals.....	76
Pay Rate	24
PayClock Support Line	4, 5
PayClock Terminals.....	4, 43
Payroll Export Wizard	32
Payroll Interface.....	32
Payroll Totals.....	91
Payroll Totals / Wages	91
Payroll Totals / Wages(ASCII Format).....	vi
Payroll Totals(ASCII Format)	vi
Performance	v
Periodic Maintenance.....	i
Phone Number	51
Poll.....	25

Polled	46, 50, 58, 62, 63, 64
Polling.....	38, 46, 62, 63, 64, 65, 70
Polling Schedules.....	62, 65, 73
Polling the Terminal.....	72
Polling Times	64
Port Settings	48
Print Format	34, 86
Print Order	34, 86, 88
Pulse Dialing	42
Punches	30, 76, 96

R

Recalculate	ii
Recalculation.....	97
Refresh	99
Registering	1
Reinstall	ii
Remote	41, 44, 46, 48, 51, 53, 59
Report.....	ix
Report Preferences	33
Reporting.....	70, 83
Restore	76
Retrieve an Archive	93
Retrieve an Employee Timecard to Edit	74
Retrieving.....	70, 73
Rounding.....	30
rpt.....	ix
RS-232	48, 51
RS-485	48, 55, 57, 60
RS-485 converter	55
Run a Pay Period Report.....	83
Run an Employee List Report.....	86

S

Save a Report	88
Save As	91
Schedule Tab.....	18
Schedule Templates	17
Security	40, 41, 48
Select Next ID.....	50, 58
Semi-Monthly	27
Send Names/Data.....	93
Serial Number	2
Set up Pay Period	27

Settings	40-48, 50-53, 55, 57-59, 62-64
Setup	6, 7, 8, 38
Setup Department Names	16
Setup Meal Punches.....	10
Setup Overtime	29
Setup Rounding.....	30
share.exe	iii
Sign In.....	71
Signing In.....	70
Single Terminal Mode	72
Software Performance.....	92
Software Preferences	35
Starting.....	7
Stop Bits.....	52, 57
Support.....	1, 4
SWIFT PC	55
Sync Time Devices	
Adding a Device to an RS-485 Connection .	60
Creating an RS-485 Connection	60
Setting the Time	61
Synchronizing	99
System Properties	40, 44, 48
System Requirements.....	3
T	
Terminal.....	53, 60
Terminal Manager.....	22, 38, 93
Creating an RS-485 Connection	60
Terminal Manager Module	1
Terminal Properties.....	9
Terminal Tree	40, 66
Terminals	38, 47, 48, 63
Test the Badges	27
Tile.....	88
Time	4, 5, 40, 47, 51, 53, 59, 62, 64
Time / Date	47
Time Card Symbols	75
Time Cards.....	74
Tips	77
Tool Bar	40
Totals	83, 84
Transaction.....	83, 85
Transfers	96
<i>txfix</i>	
Type	41, 50, 55, 58
Types of Pay Period Reports.....	84
U	
Unassigning an Employee from a Terminal.....	67
Updating.....	93
V	
View menu	76
W	
Wages.....	83, 84
Warning Messages	35
Weekly	27
Wizards	69
Work Hours to Qualify For Auto-Deduct	12
Y	
Year.....	47