EMPLOYEE TRACKER
QUICK START GUIDE

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

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

Table of Contents

<u>Employee Tracker Installation</u>

System Requirements

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

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

Memory Requirement

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

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

Printer
Inkjet - Most standard products
Laser - Most standard products

Video
SVGA 800x600 (small fonts)

Communications
COM 1, 2, 3 or 4

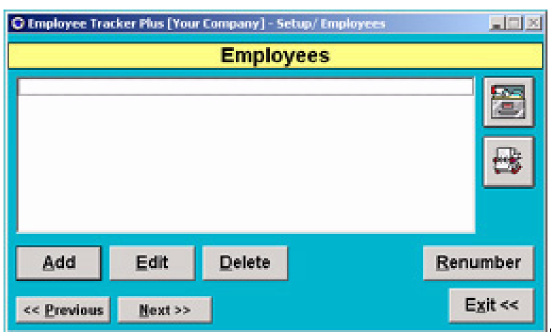
About the System

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

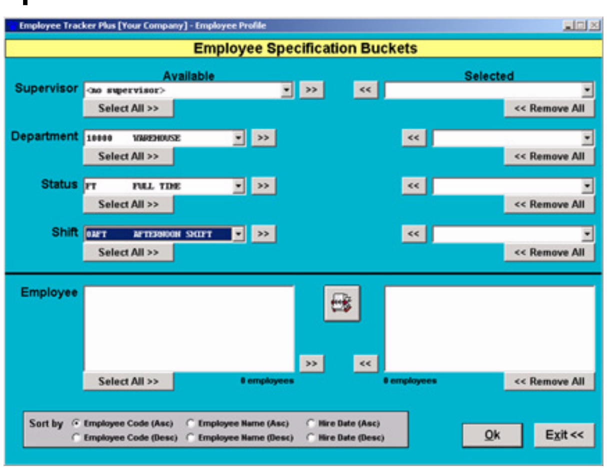
Employee Specification Buckets

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

Click the file cabinet button  within the Employees window.



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



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

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

To Select or Remove Your Selections:

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

To move or remove records from '*Selected*' column back to '*Available*', follow the above directions and hit the << button for one record or the << Remove All button to remove all records.

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

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

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

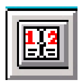
Shift -- The last step is choosing the shifts to be included in the specification. Shifts are assigned to each employee. Examples of shifts are *Days*, *Afternoon*, *Graveyard*, etc.

Date Range

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

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

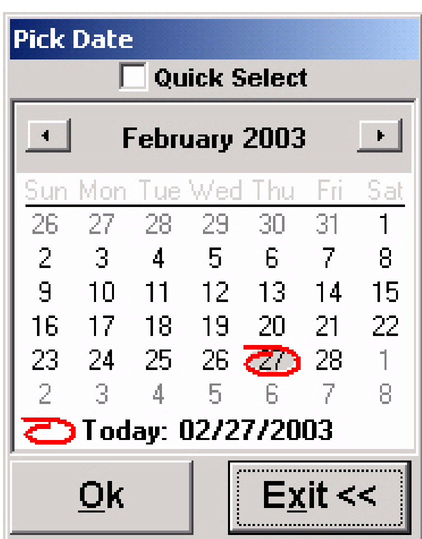
- Double-clicking in the date field will enter today's date.
- [**Page Up**] and [**Page Down**] keys will toggle between months.
- **Up** and **Down** arrow keys will toggle between days of the week.

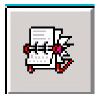
Pop-Up Calendar 

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

If you click on the calendar symbol, a calendar as shown below will pop up. Simply select the appropriate date with your mouse and click [**Ok**]. To move between months use the  and the  buttons.

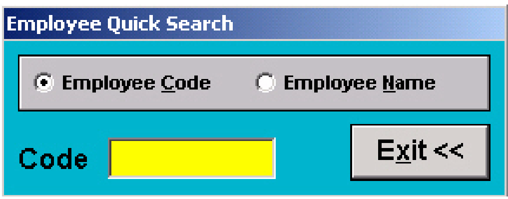
By double-clicking on a date, you will select the date and the pop-up window will close. The date you clicked on will have been selected. If you select the box labelled '**Quick Select**', when you single-click on a date the day will automatically be selected and the calendar will close. There's no need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



Rolodex Search Button 

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

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



Key Usage

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

Installation

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

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

Follow the instructions on the screen as displayed.

Data Capture Software

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

Set Data Path

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

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

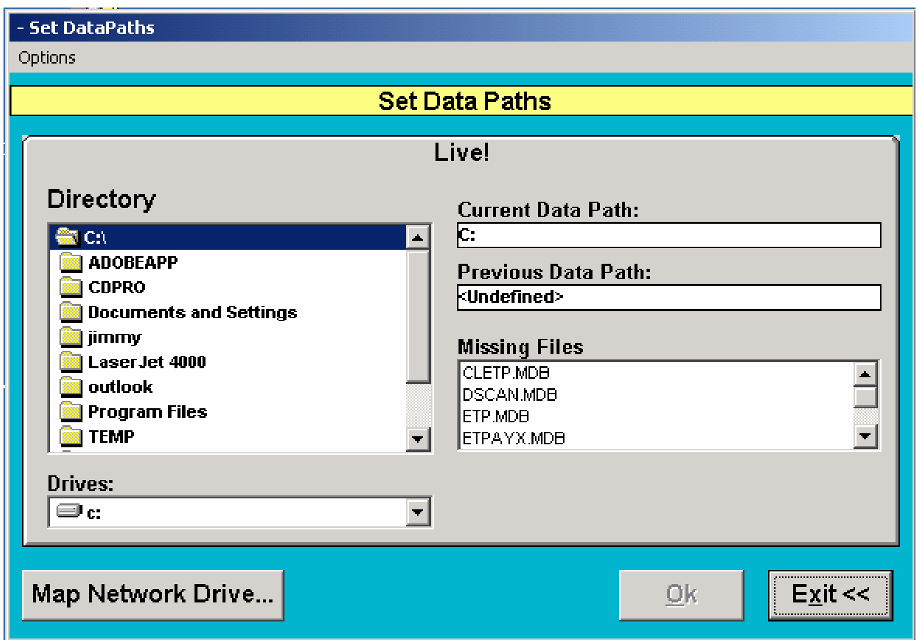
<u>Employee Tracker Quick Start</u>

After the Software Is Installed

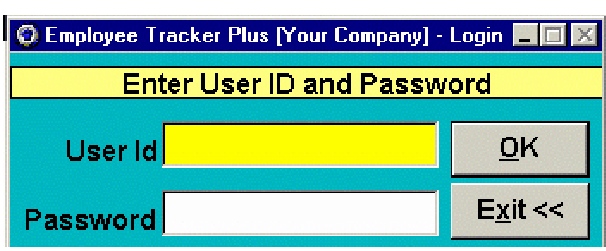
To initiate Employee Tracker software:
Click the [**Start**] button, [**Programs**], [**ETP**], and then [**ETP**] again.

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

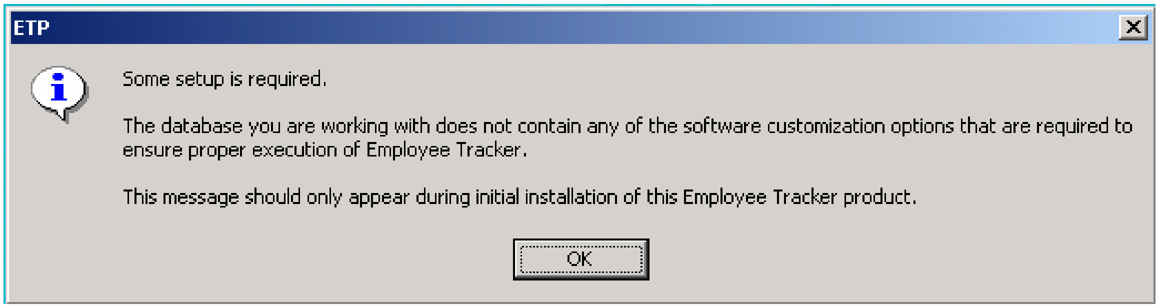
First, click on [**Options**] in the menu bar. Next, select [**Allow creation of blank databases on "invalid" datapath**]. Now you can set your data path to point to the folder you created earlier. On the left-hand side under Directory select the folder. Once you've selected the folder click on [**Ok**].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



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



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



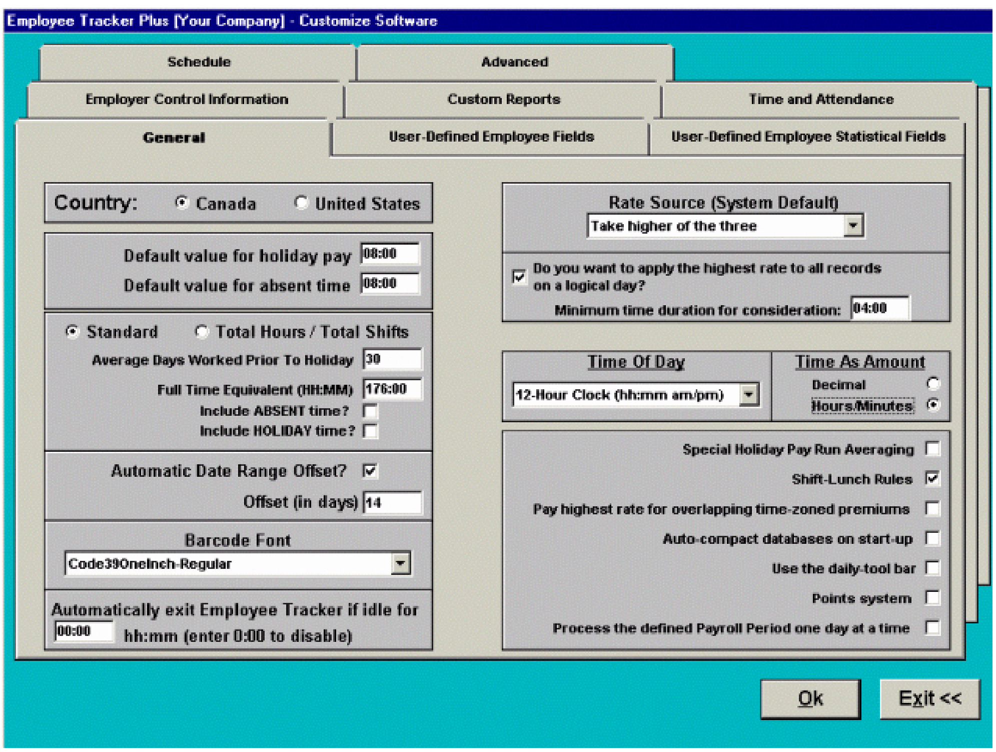
Click on [**Ok**] and the Customize Software window will open. You are required to enter some information now. See instructions starting on page 11.

Customizing Your Software

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

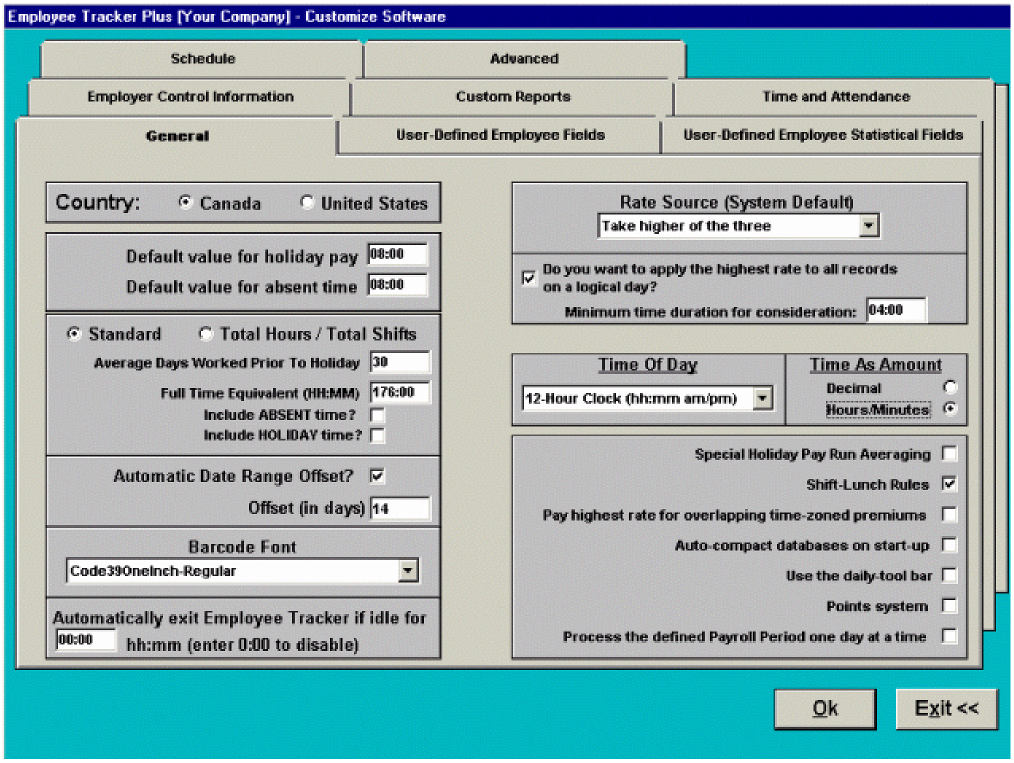
If the Customize Software window is not already open, select [**Utilities**] and then [**Customize Software**].

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

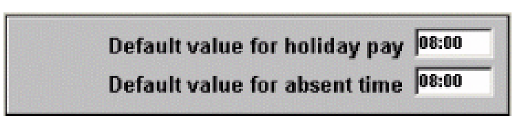


General Tab – Customize Software

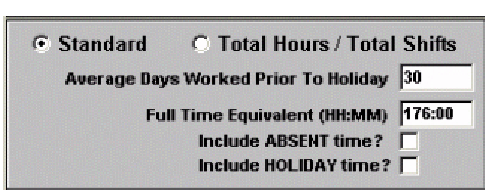
First, we'll start with the General tab to customize your software. Below the following window you will find an explanation of each section of this tab.



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



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

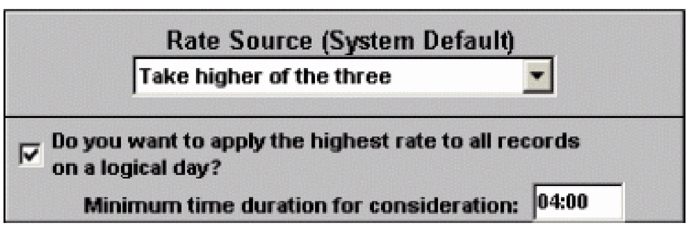


These fields enable you to enter stat holiday pay calculation parameters. The system also supports more detailed stat holiday calculation rules on the "Setup" menu which will supercede these. This entry is however, mandatory.

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

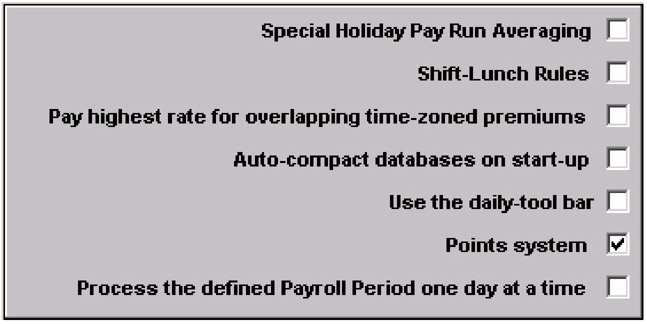
Used for badges to select bar font of your choice. This is required.

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



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

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



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

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

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

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

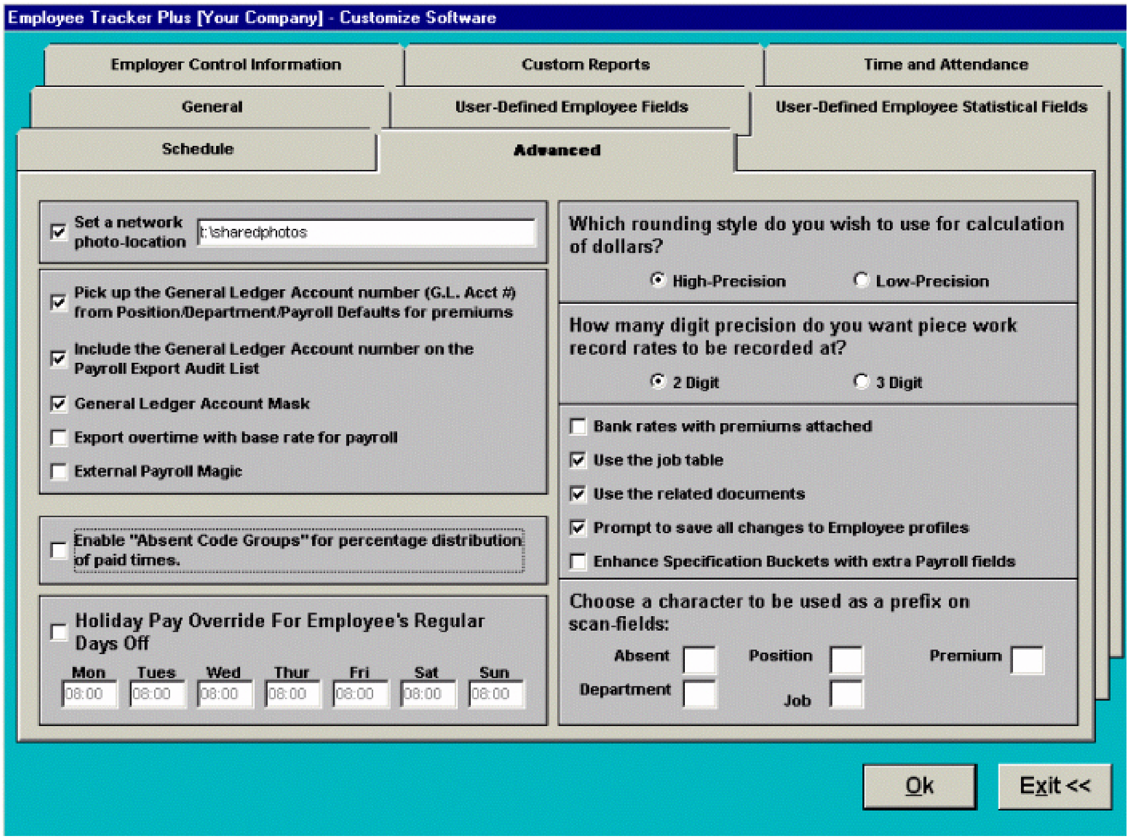
Use the daily-tool bar: Allows user the option to display a large button tool bar of commonly used menu steps on the main screen.

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

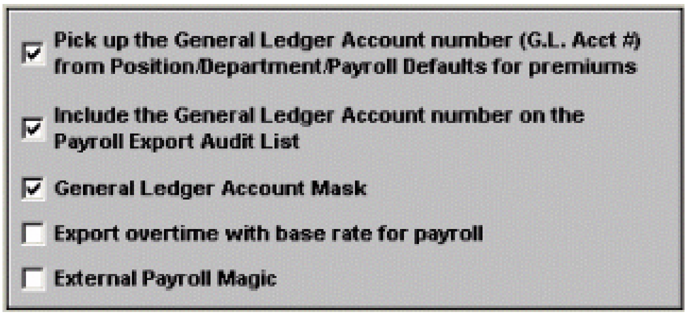
Process the defined Payroll Period one day at a time: Employee Tracker natively processes your payroll export step using a simple “from” / “to” date selection method. You therefore simply enter the starting date and ending date of the pay period each time you run the payroll export step. If you turn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

Advanced Tab – Customize Software

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



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



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

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

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

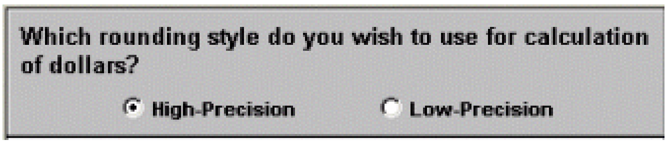
Export overtime with base rate for payroll: Turn this on if your overtime and double time rate must be the base rate when exported to your payroll.

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

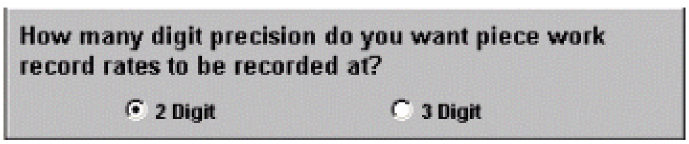
(*Note:* Advanced tracker will advise you when this should be turned on, otherwise leave it off).

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

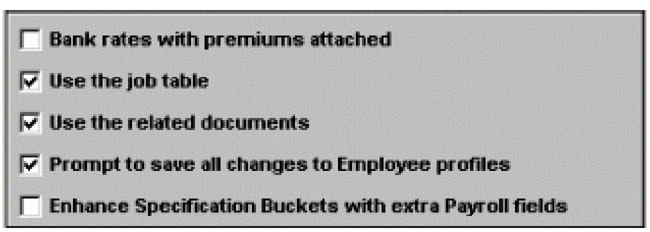
Turn this on if you have variable default work shift durations that effect stat holiday pay based on the day of the stat.



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



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



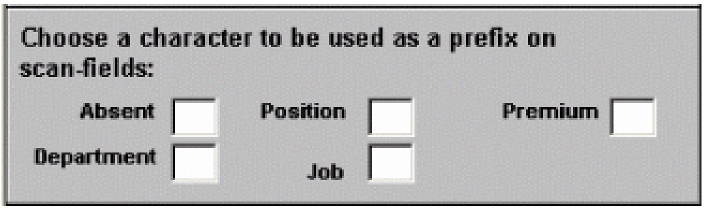
Bank rates with premiums attached: If you are using time banking and time that is banked has a premium attached, if you turn this switch on the hourly rate of the banked time will include the premium rate value.

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

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

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

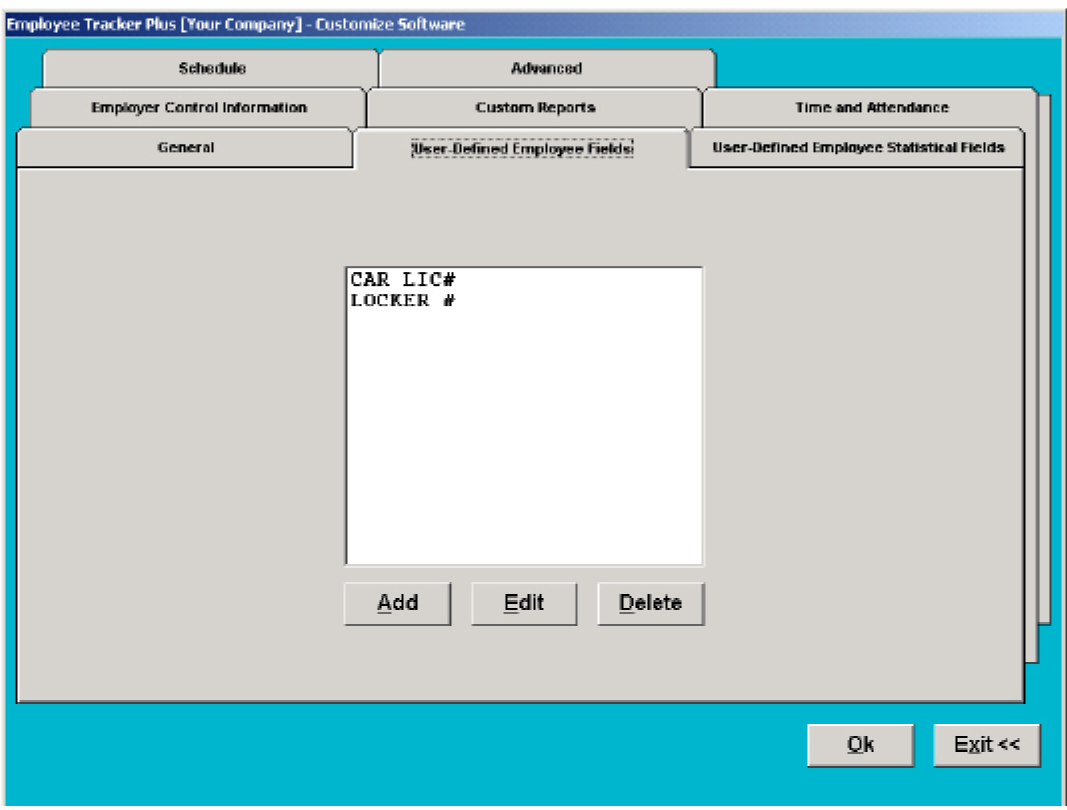
Enhance Specification Buckets with extra Payroll fields: Turn this on to add 2 more filter data elements for the “employee specification bucket” function of the system. The extra fields added are Pay Type and Frequency.



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

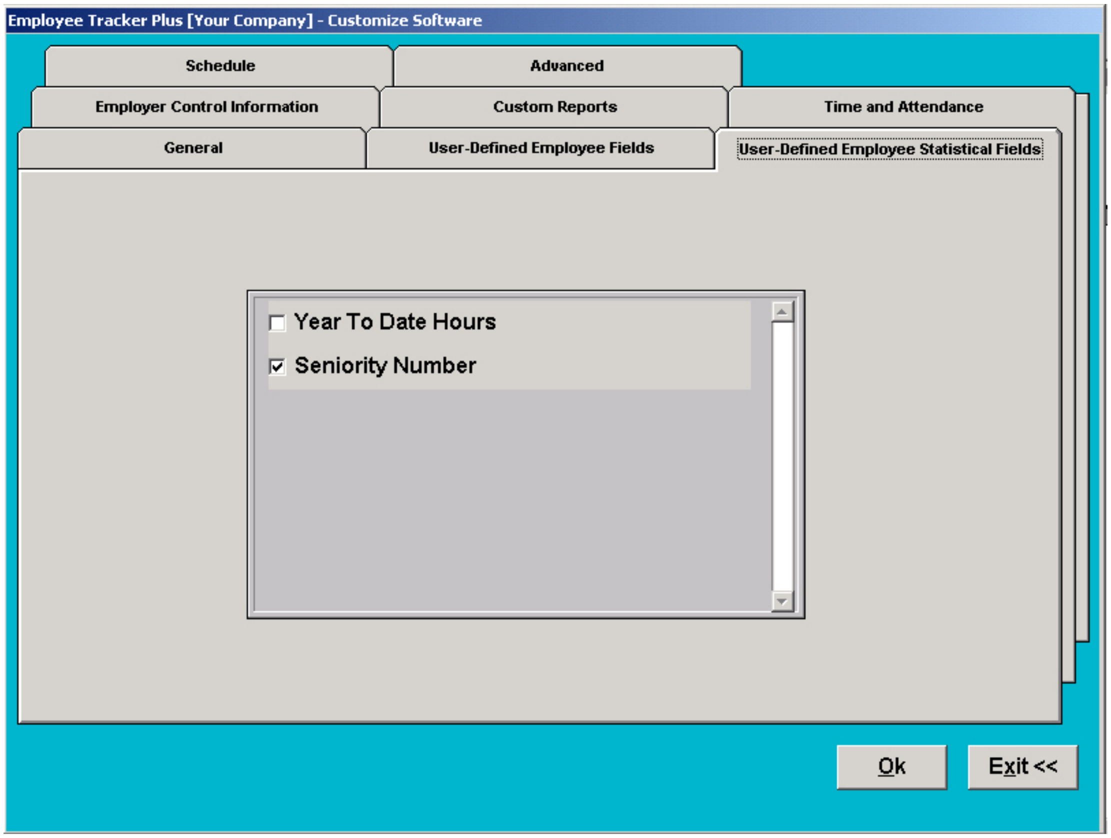
User-Defined Employee Fields Tab - Customize Software

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



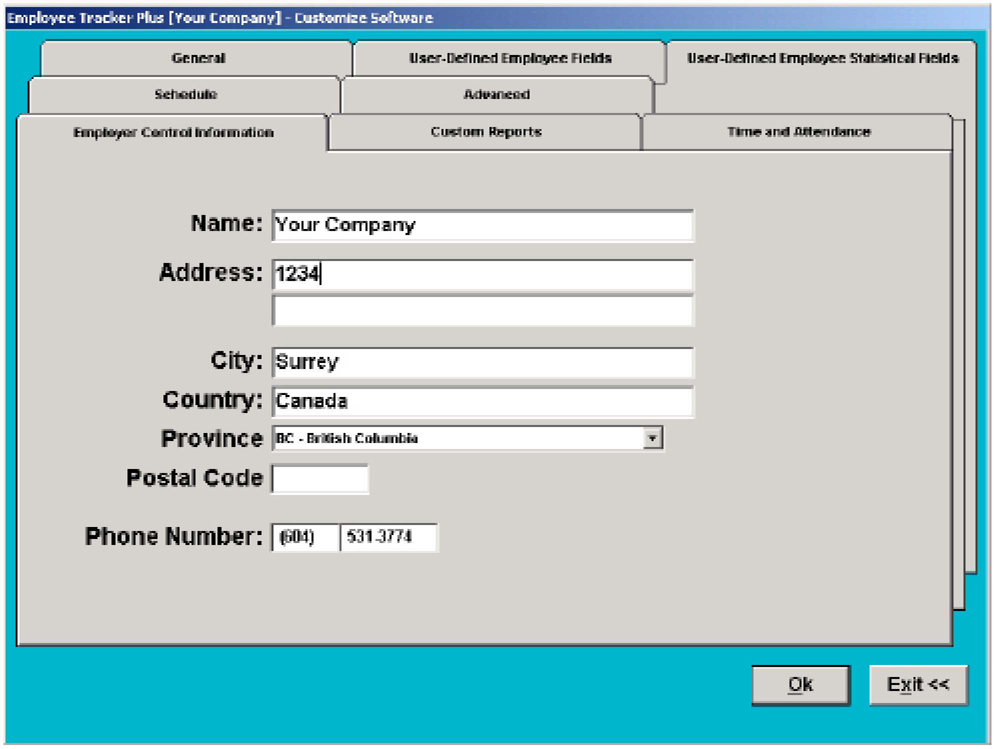
User-Defined Employee Statistical Fields Tab – Customize Software

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

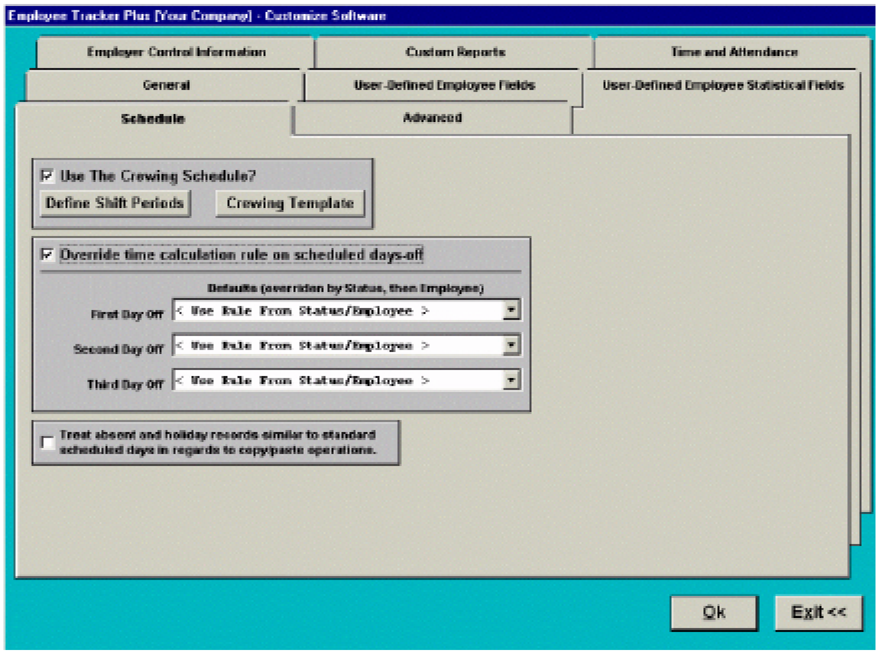


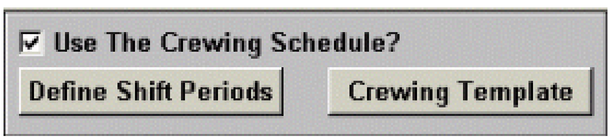
Employer Control Information Tab – Customize Software

Simply fill in the blanks with your appropriate company information.

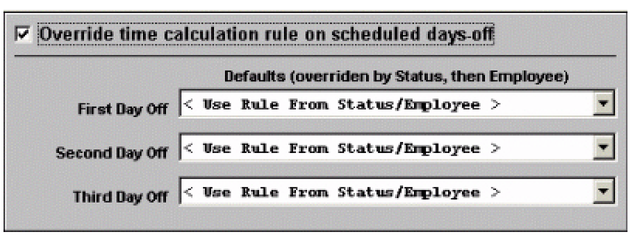


Schedule Tab- Customize Software





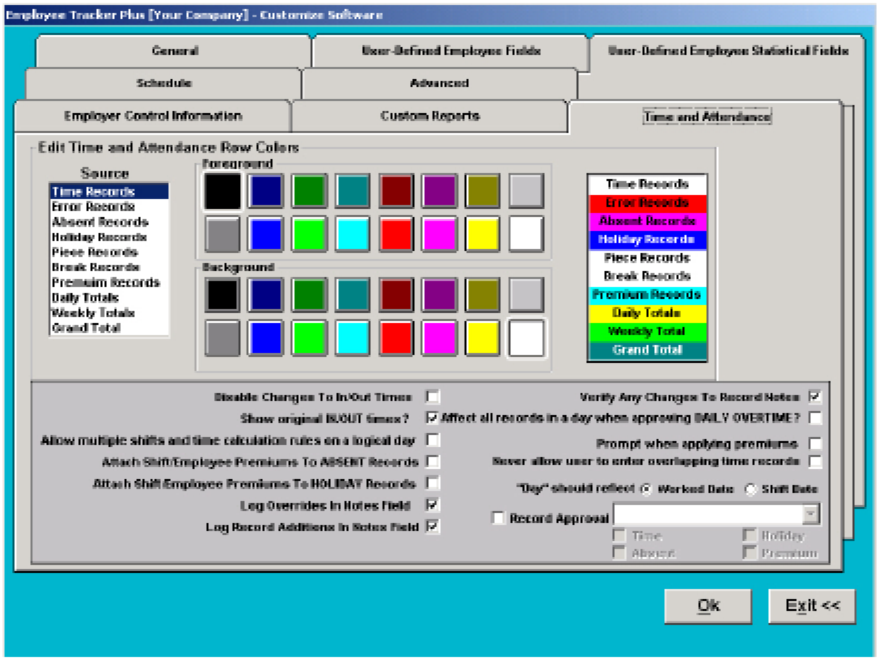
If you are using weekly crew scheduling, you will have to enter shifts, departments and positions from the setup menu first. Then you can return to this step and set up shift periods and crewing templates.

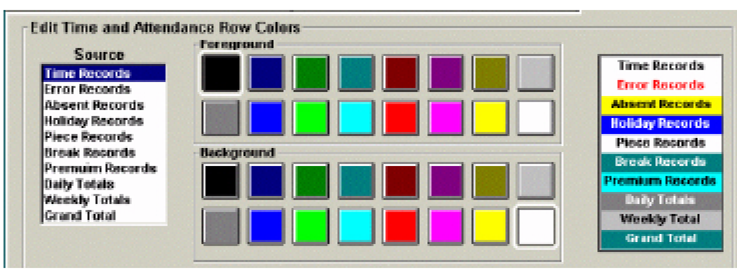


If you have overtime rules that are conditioned to working on first, second, or third scheduled days off, you would have to set up time calculation rules first and then return to this step and point the relevant days off to the appropriate time calculation rule. This is the system default and can be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

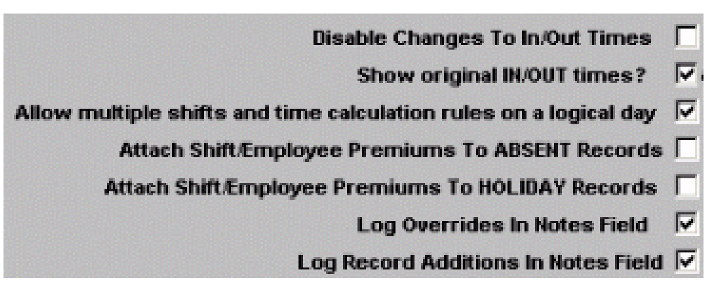
Checking this option allows you to perform time-saving copy/paste functions in the same manner as with scheduled work days.

Time and Attendance Tab – Customize Software





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



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

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

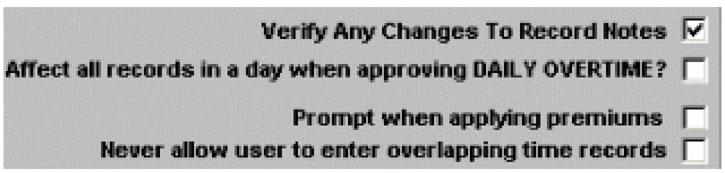
Allow multiple shifts and time calculation rules on a logical day: Turn this on to enable employees to work more than one shift per day.

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

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

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

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



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

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

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

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

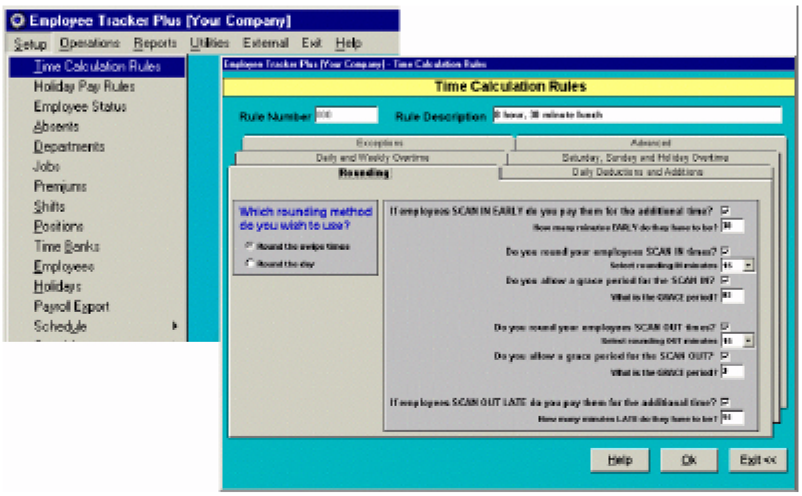
The system uses a shift date and work date for all transactions. The work date applies to the date the employee swiped in. The shift date refers to the date the transaction is applied to. Reports and screens will display the day of the week. Ex. Mon, Tues. This switch controls whether you want to display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

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

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

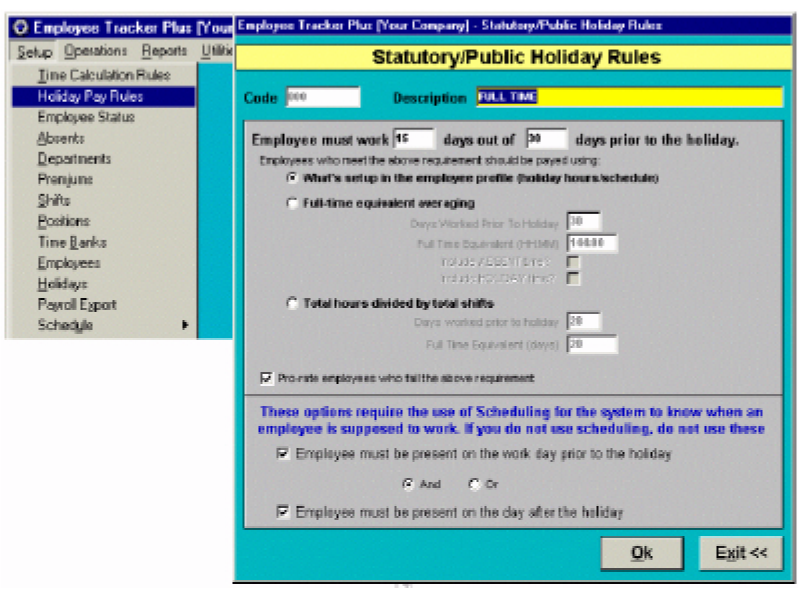
Time Calculation Rules (Mandatory)

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



Holiday Pay Rules (Optional)

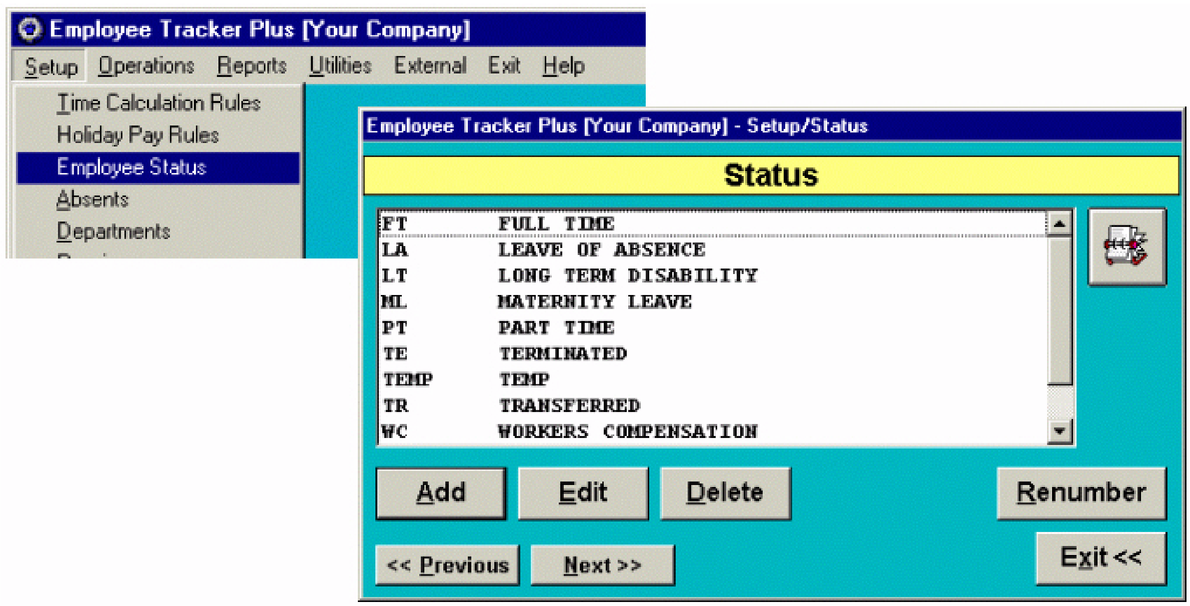
From the [**Setup**] menu, select [**Holiday Pay Rules**] and enter your stat holiday pay rules. These rules are generally governed by provincial or state labor law. Most employers create one rule for full-time staff and one rule for part-time staff.



Employee Status (Mandatory)

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

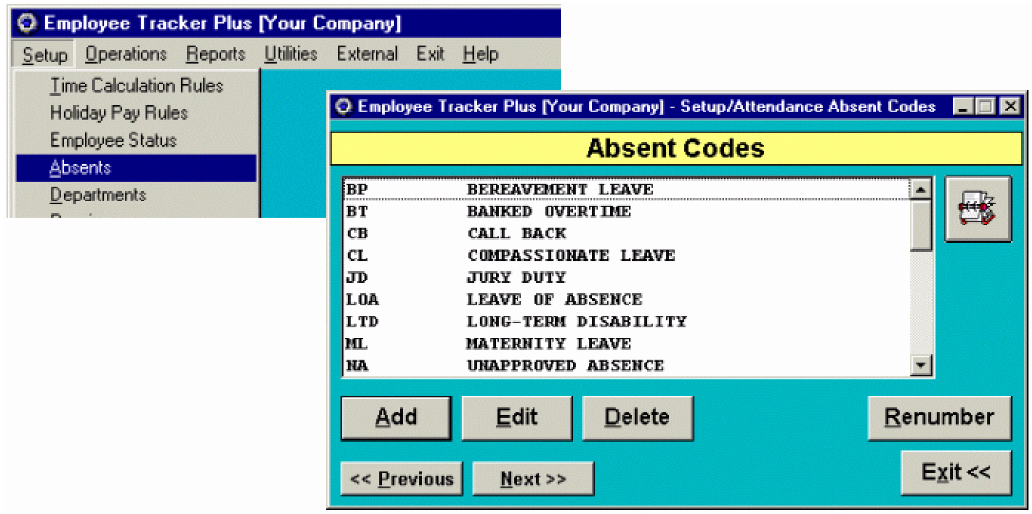
Typical status code examples are: FT – Full Time, PT – Part Time, T- Terminated and L-Laid off.



Absent Codes (Optional)

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

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

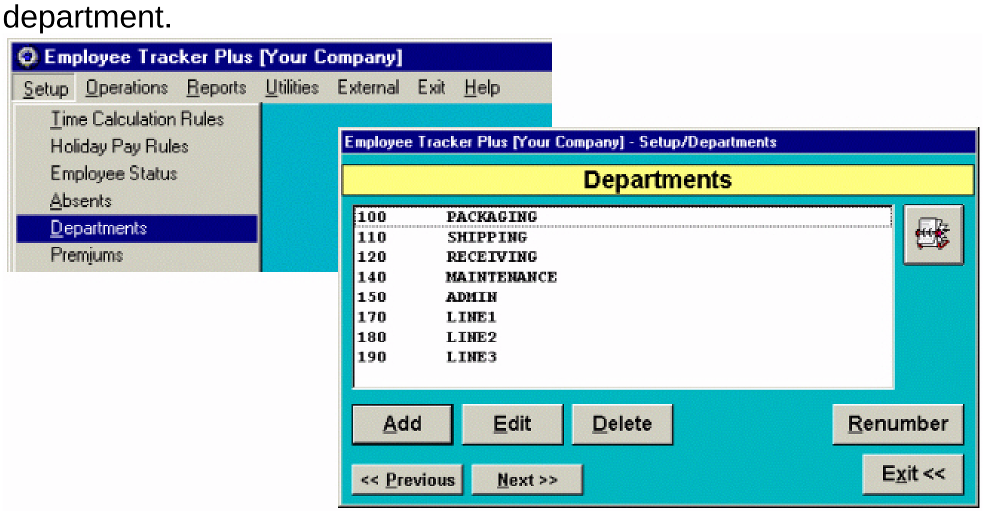


Departments (Mandatory)

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

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

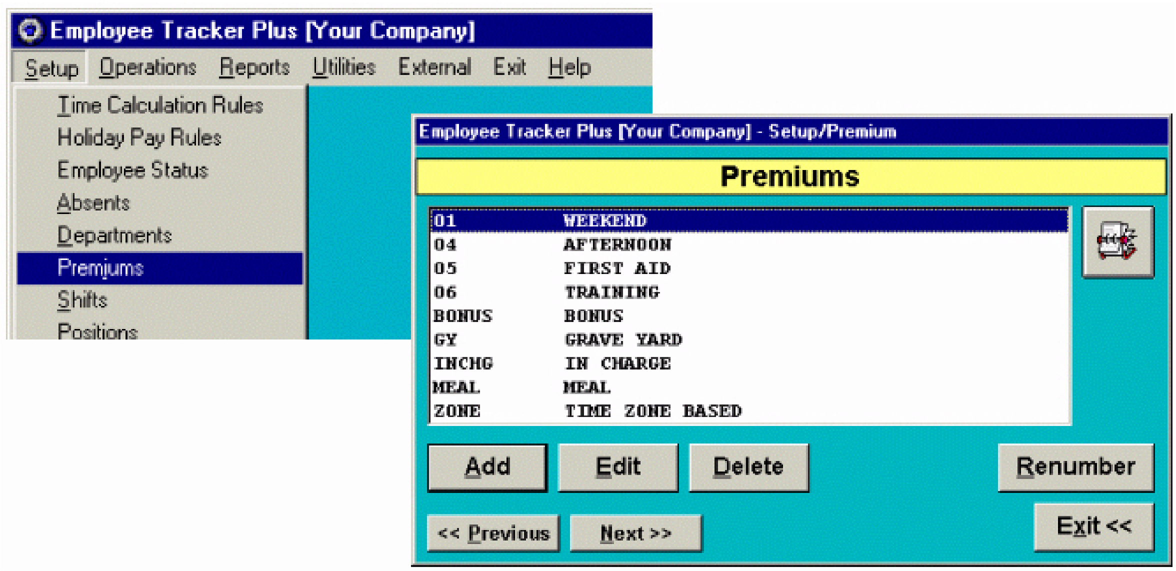
Departments also play a critical role in scheduling as schedules can be created including departmental assignments and you can print or view schedules by department.



Premiums (Optional)

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

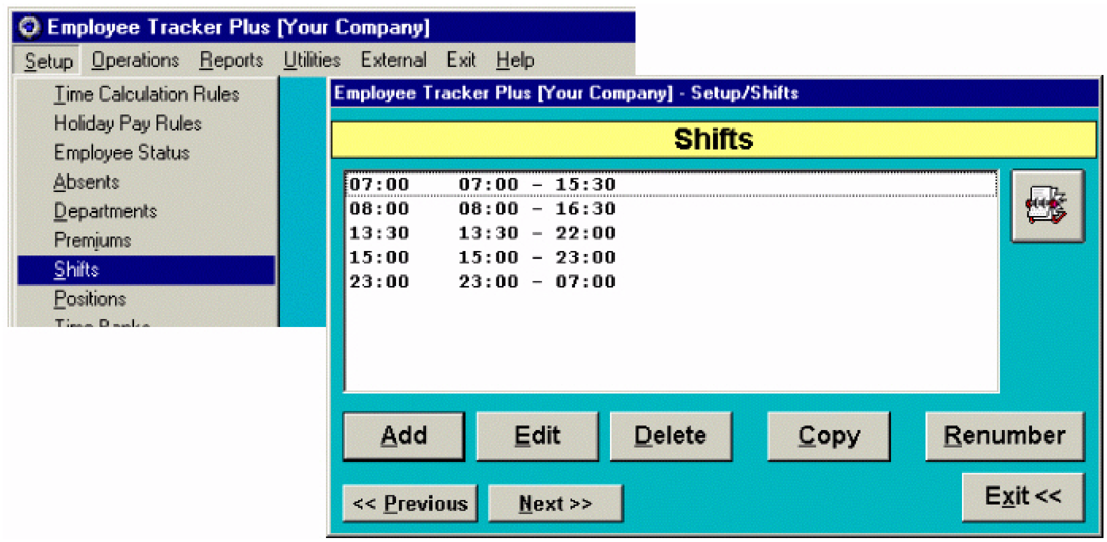
Typical premium examples are: Afternoon, Night, First Aid and Lead Hand.



Shifts (Mandatory)

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

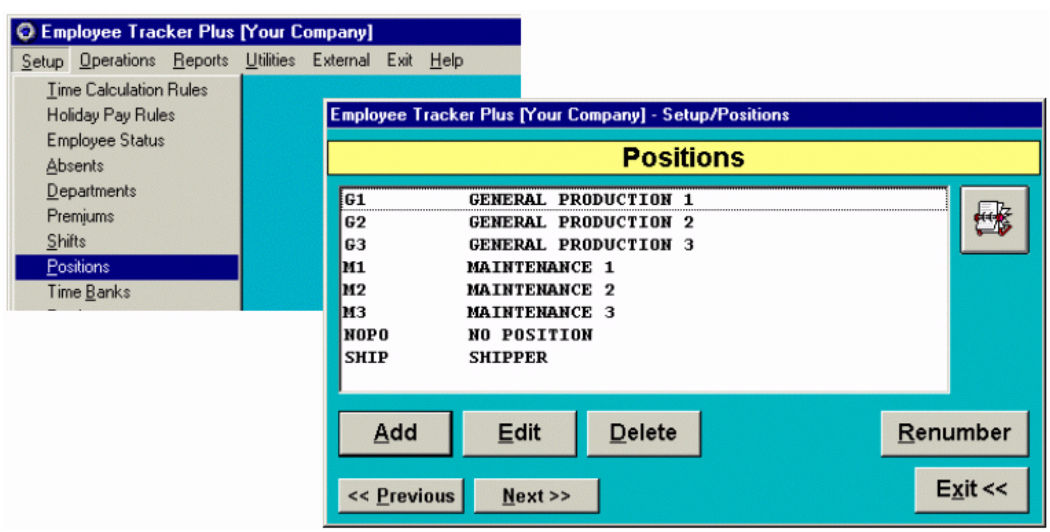
Typical shift code examples are: Day (07:00 – 15:30) and Aft (15:30 – 23:00)



Positions (Optional)

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

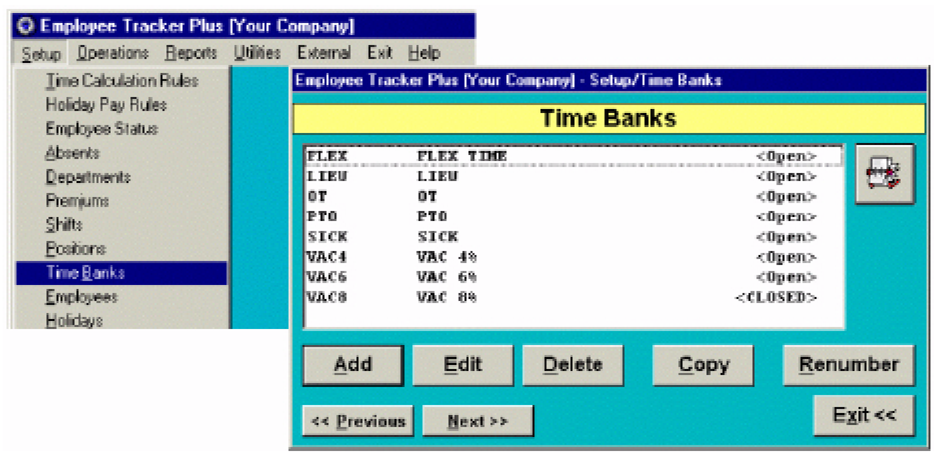
Position code examples: WELD – Welder, COOK – Cook and RN – Registered Nurse.



Time Banks (Optional)

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

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



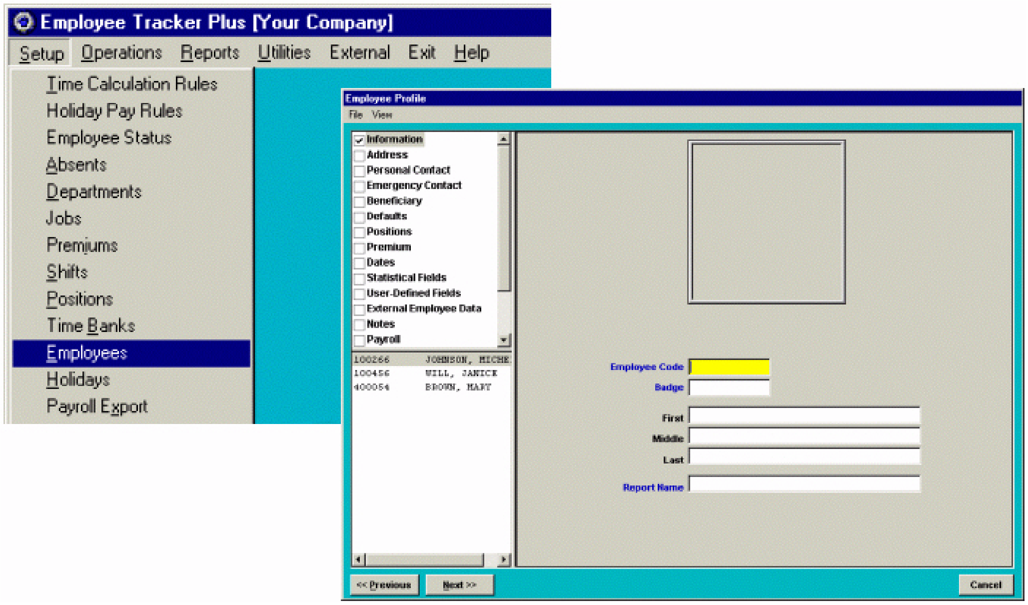
Employees (Mandatory)

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

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

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

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

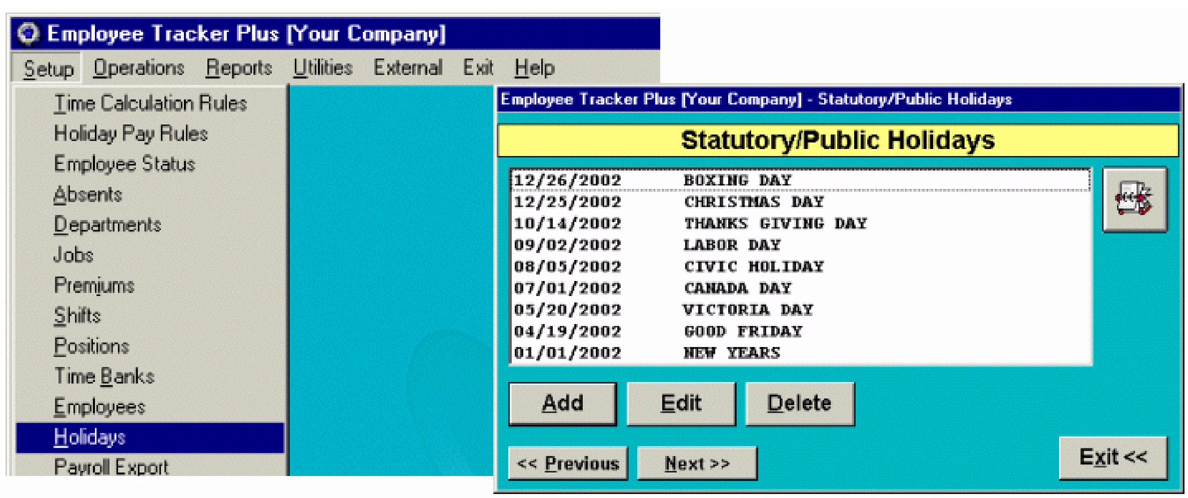


Statutory Holiday Dates (Optional)

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

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

Note: this is subject to annual review and input.

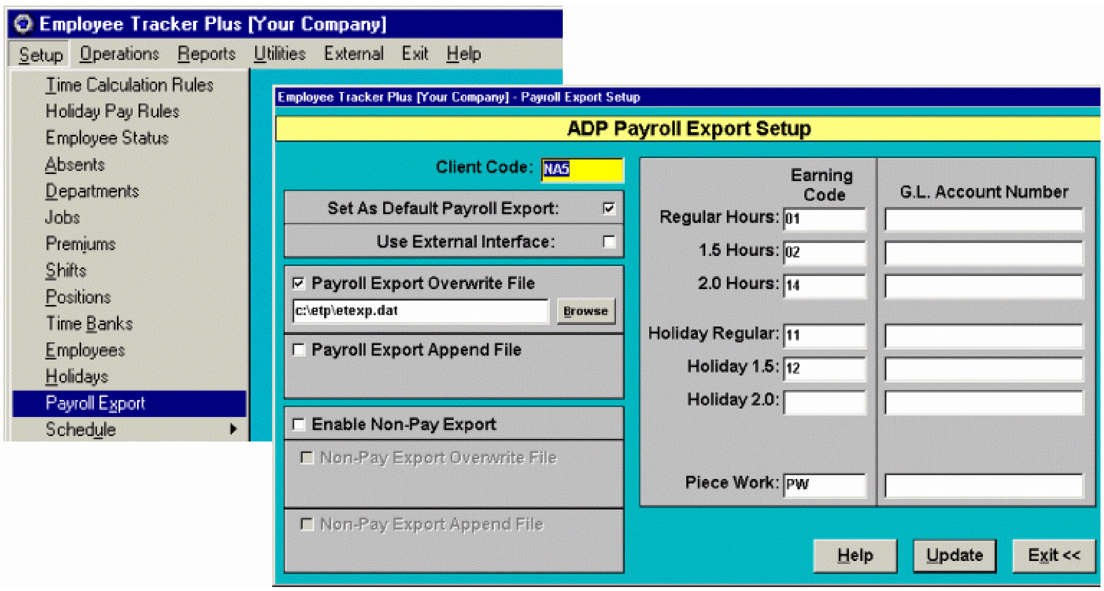


Payroll Export (Optional)

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

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

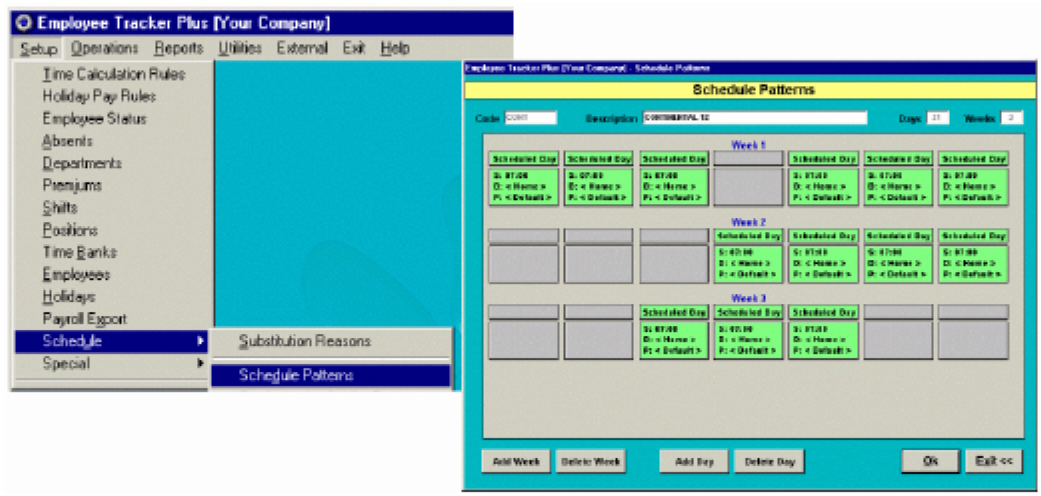
Note: Client Code and Earning Codes must match the codes supplied by your Payroll product.



Schedule Patterns (Optional)

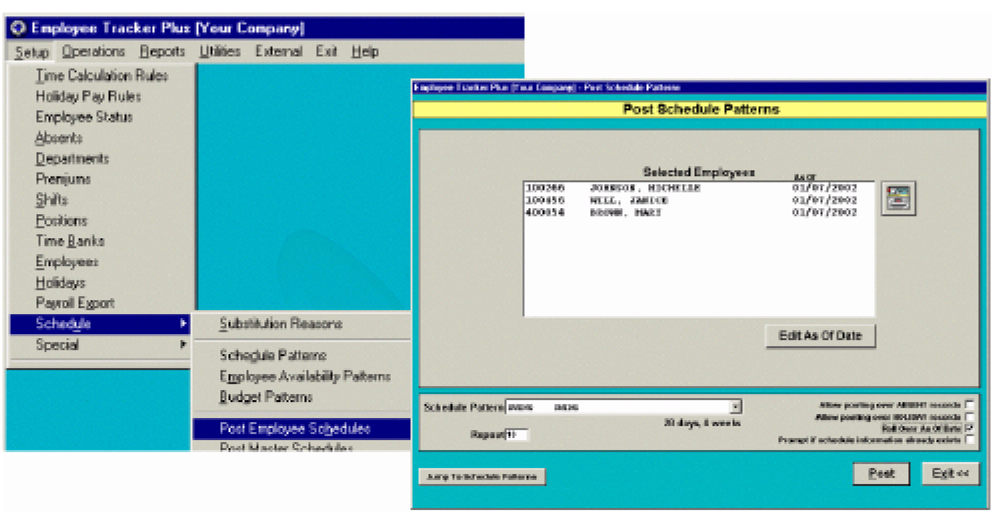
If your Employees work variable shifts, and there is a repetitive pattern to it, you should create schedule patterns. Simply create one pattern for each situation. You do not need to make a pattern for each employee, but rather one pattern per shift type which can be applied to many employees. To setup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

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



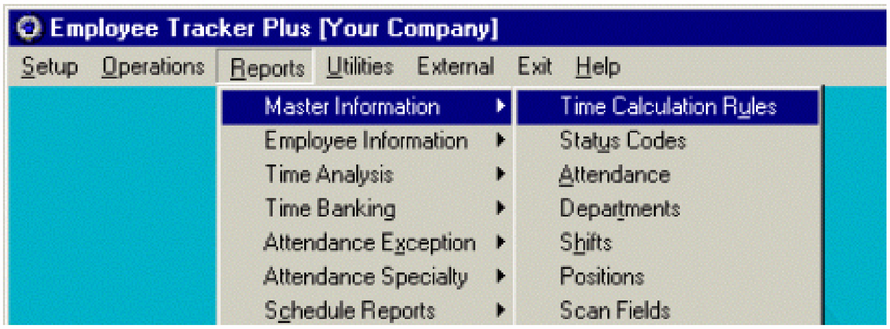
Post Employee Schedules (Optional)

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

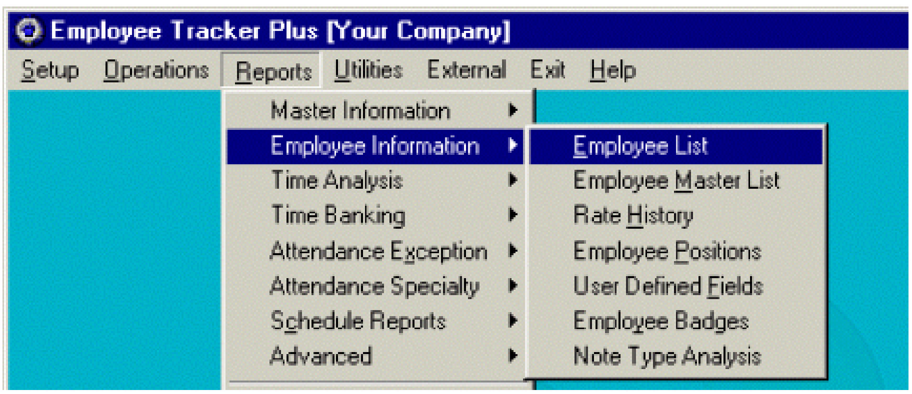


Print Setup Reports

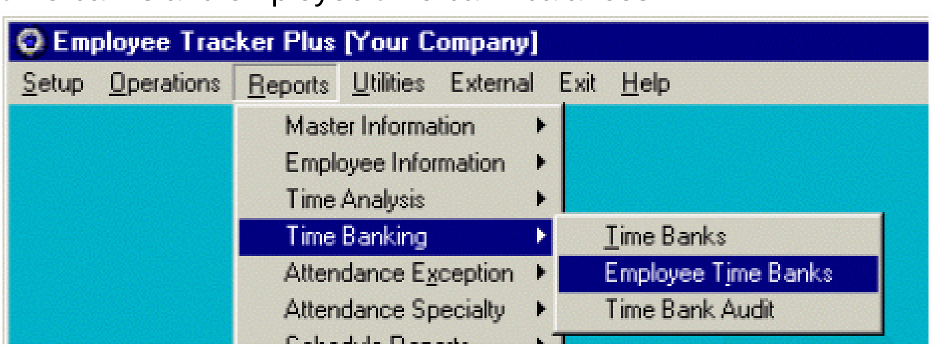
From the [**Reports**], [**Master Information**] menu you can select and print a report for time calculation rules, status codes, attendance codes, departments, shifts and positions.



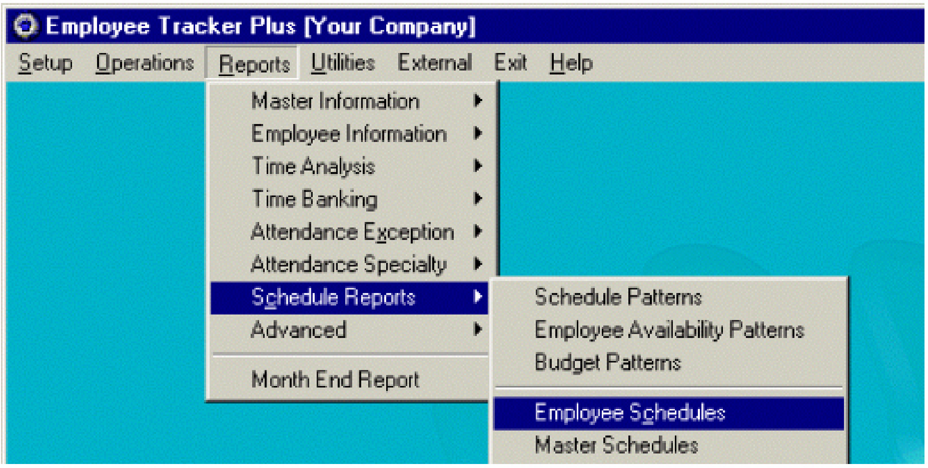
From the [**Reports**], [**Employee Information**] menu you can select and print reports for employee information.



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



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



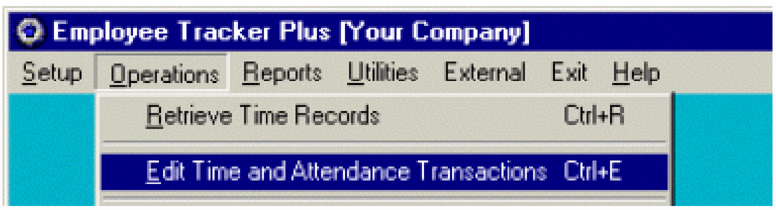
Operating the System on a Daily Basis

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

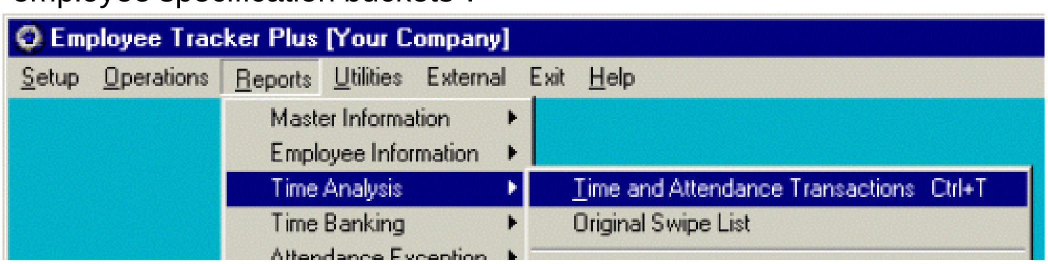
A list of recommended daily procedures is listed below:

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

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



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



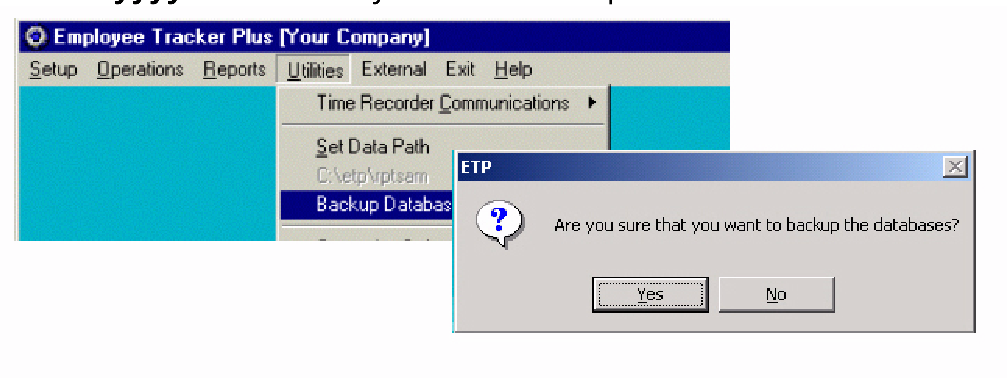
Operating Periodic Steps

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

Data Backup

Remember to backup your data!

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



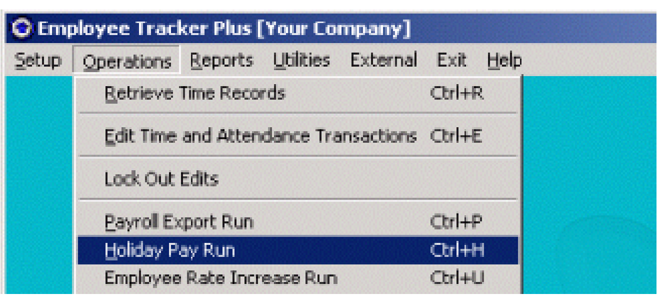
RUNS

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

Holiday Pay Run

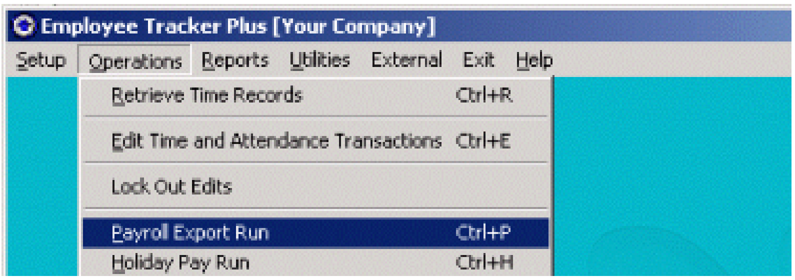
Run this step to pay employees for a public holiday on the first working day after the holiday.

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



Payroll Export

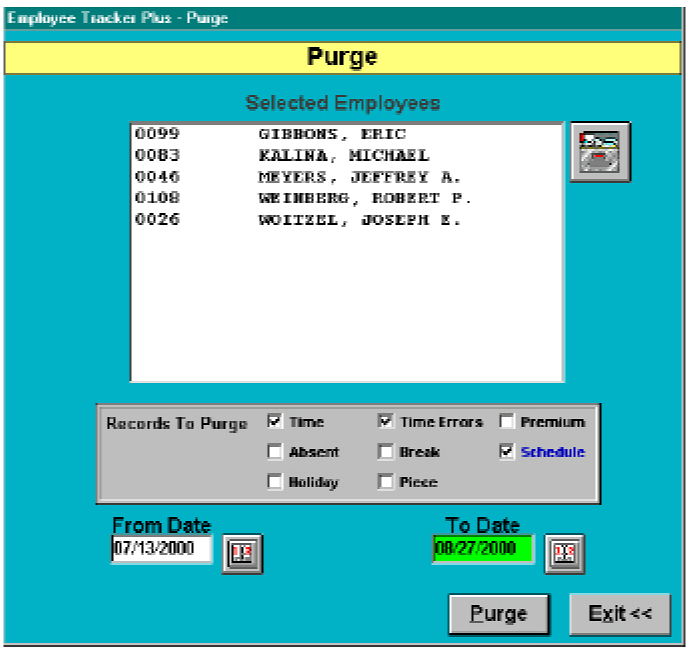
At the end of the pay period after you have finalized the time information, you can run the payroll export step if you are exporting to your payroll system. From the menu, hit [**Operations**] and then [**Payroll Export Run**].



File Purge

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

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



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

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

File Compact & Repair

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

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

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

Time Recording

Time Recorder Setup

Are you using electronic time recorders with Employee Tracker?

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

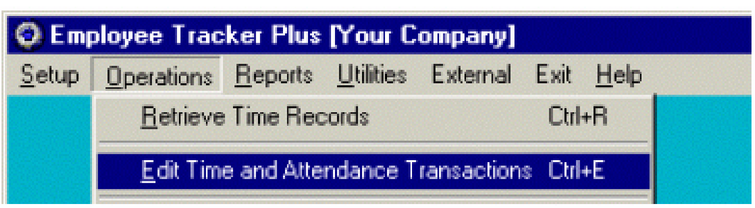
Symcod
CMI 2016
RSI Hand Punch
RSI HP3000 Serial

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

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

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

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



Wait 15 minutes and go scan the same badges out.

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

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

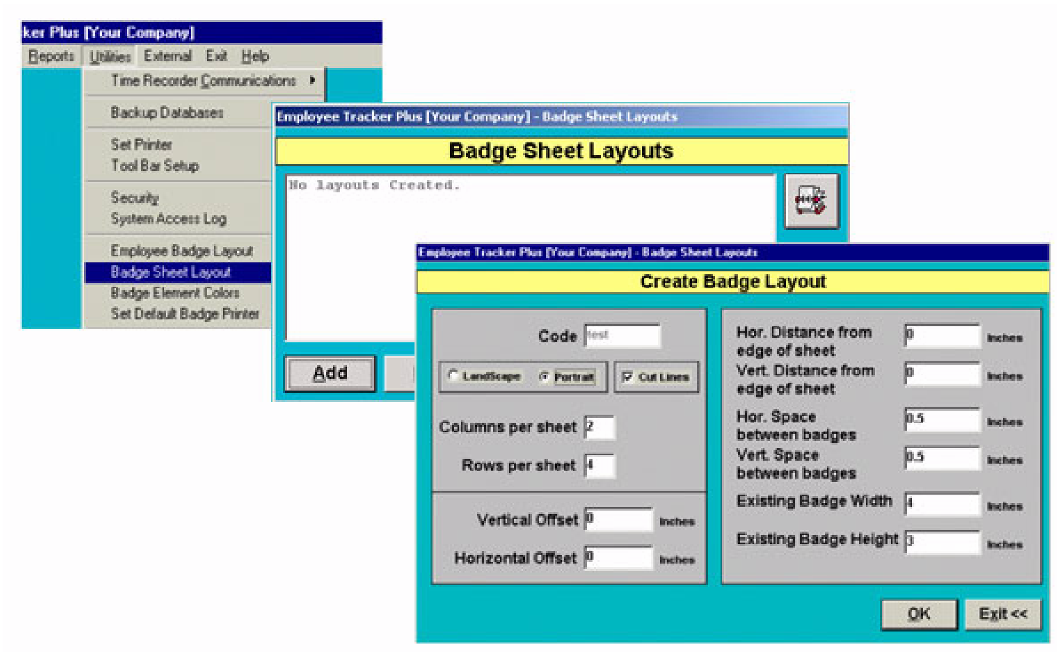
You can now issue badges to employees and show them how to scan.

Badges

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

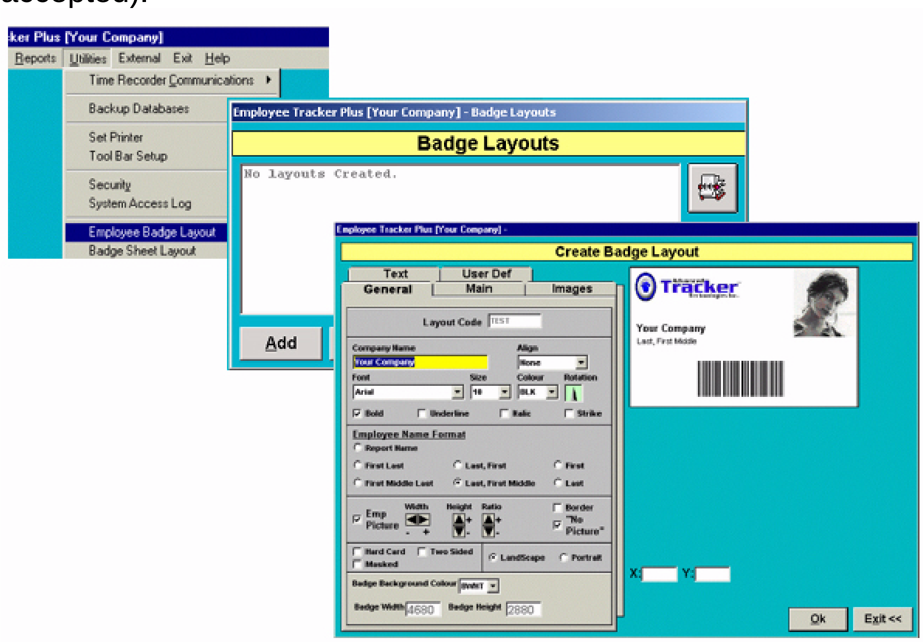
Step 1: **BADGE SHEET LAYOUT**

From the [**Utilities**] menu select [**Badge Sheet Layout**]. Then from the Badge Sheet Layouts window select [**Add**]. You can create multiple layouts of how you would like your badges setup and printed on a page.



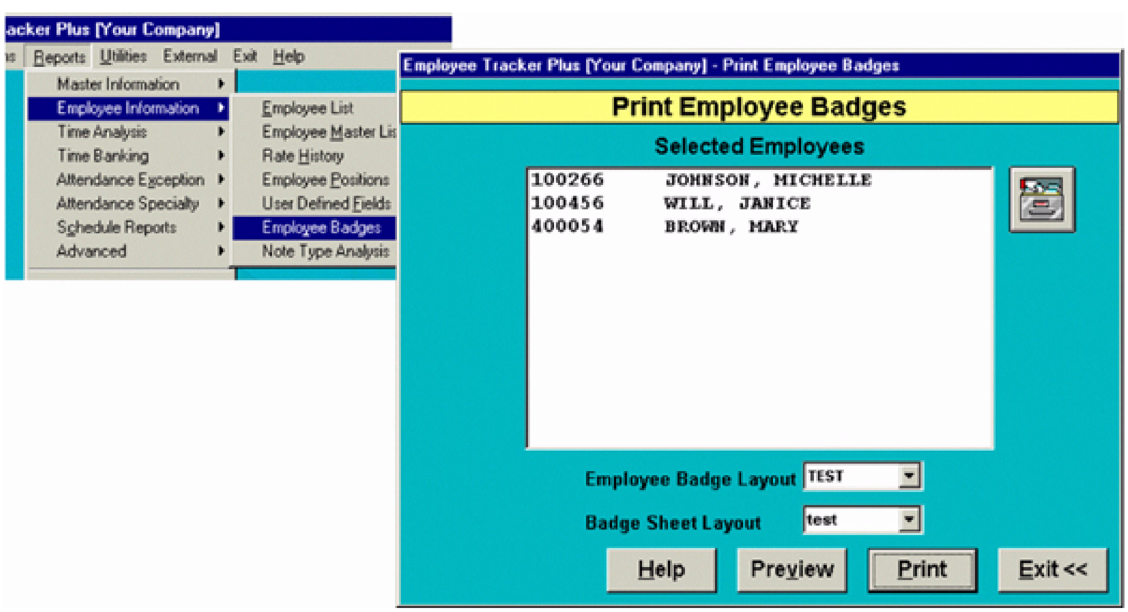
Step 2: **EMPLOYEE BADGE LAYOUT**

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



3. Print your badges

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



NOTES: