© TimeClick Getting Started Manual

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Table of Contents

WHAT TO EXPECT WITH THIS MANUAL	,
Resources Found on Website and Blog3	,
Contact Customer Support Team3	,
INSTALLING TIMECLICK	,
How TimeClick Works	,
Local Network Software3	,
Server vs Client	,
Install files4	-
Install the database4	-
Connecting Workstations to Server/Database4	-
REGISTERING TIMECLICK DATABASE	-
GETTING STARTED	,
Opening Admin Mode5	,
Setting Preferences5)
Set Pay Period5	,
Set Overtime5	,
Adding Employees6)
Create an Employee Record6)
Employee Training)
Simple Clock Actions)
Messages Tab6)
How to read a message6)
How to create a new message7	,
How to delete a message7	,
How to reply to a message7	,
How to Submit a Missed Action to Admin8	í
How to Submit a Time off Request to Admin8	í
View Hours Tab9	1
How to run a report9	1

View Accrued Time Tab	9
Settings Tab	9
How to change my password	9
Admin Privileges Tab	10
Reports	10
How to Run a Report	10

WHAT TO EXPECT WITH THIS MANUAL

This manual takes you through the basic setup of TimeClick, from installation to fully functioning for employees and running reports. For assistance with more advanced features, here are other resources available.

Resources Found on Website and Blog

You can find additional documentation such as the <u>FAQs page</u> and <u>Video Tutorials</u> on the <u>Support</u> <u>Center</u> on our website.

The blog is another great resource for tips with the software and documentation on using advanced features.

TimeClick Blog Features: <u>http://www.timeclick.com/blog/category/timeclick-features/</u> TimeClick Blog Technical Support: <u>http://www.timeclick.com/blog/category/technical-support/</u>

Contact Customer Support Team

Our support team is happy to assist. Contact them by emailing support@timeclick.com or calling (435)753-4102. Live chat is available through our website at timeclick.com.

INSTALLING TIMECLICK

How TimeClick Works

Local Network Software

TimeClick is a network-based software. This means that all the data will be stored on your system.

Server vs Client

TimeClick has two installations. The server/database install and the client/workstation install which can be installed on any Windows computer. The key thing to understand is that the server should only be installed on one computer, whereas the client can be installed on as many other computers as your license allows.

Note: Trial users have no limitations as to the number of computers running the TimeClick client.



Grey icon: This is the main application of TimeClick. It houses the TimeClick database.



Blue icon: This is the client, or workstation install. It will connect to the server/database install.

Install files

The install files were made available when you signed up for the trial or purchased the software. You should have received an email with a link to the download page. If this email was deleted or ended up in spam, use this link to access the <u>install files</u> page.

Install the database

Before running any installation files, first determine which computer you would like house the database. In most cases it should be located on a central server or a computer that is turned on longer than the others. Run the server install file on that computer and follow the installation process. Installation will take about 5 minutes to install depending on your computer.

Once the installation is complete you will have a gray TimeClick icon on your desktop. Double click this to open up TimeClick and get started.

Connecting Workstations to Server/Database

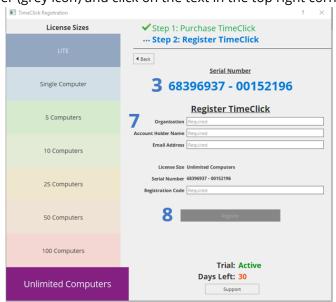
Determine which computers you want TimeClick installed on and run the <u>client installation</u> file on each one. Follow the installation process until the installation is complete. You will then have a blue TimeClick icon on the desktop. Double click on the icon and TimeClick will automatically connect to the database that you created prior to installing the workstation.

Please note: If you receive a message asking for an IP address on the workstation, it means that something is preventing the connection between the server and that workstation. Check your network connection and any firewalls or antivirus software you have on either computer, especially the server.

REGISTERING TIMECLICK DATABASE

Once you have purchased TimeClick you will receive an email that contains a link to register TimeClick. If you are still using the trial version you can ignore these steps for now.

- 1. Open the TimeClick database/server (grey icon) and click on the text in the top right corner
- that says **Days Left on Trial**.
- 2. Click the button that says **I've** Already Purchased TimeClick.
- 3. Write down the serial number that it gives you, this will be used to get your registration code.
- 4. Open the email and click on the registration link.
- 5. Enter the serial number.
- The webpage will generate a registration code to enter in TimeClick along with your company name, email address, and the license size purchased.
- 7. Select the correct license size and fill in the required



information.

8. Click Register

Note: This code is only valid for the day you receive it. If your code expires, call our support team for instructions.

GETTING STARTED

The information contained in this section will help you set the bare minimum preferences needed to utilize TimeClick as a time tracking software.

Opening Admin Mode

- 1. Press the **Admin** button in the top right corner.
- 2. Create an admin password.

Setting Preferences

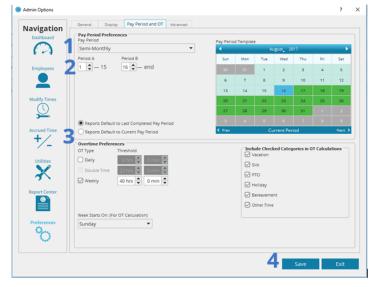
Click on the **Preferences** button on the navigation bar. Choose the **Pay Period and OT** tab.

Set Pay Period

- 1. Select the type of pay period that you utilize.
- 2. Fill in the required information about when the pay period starts.
- 3. Select either **Reports Default to** Last completed Pay Period or Reports Default to Current Pay Period.
- 4. Click Save.

Set Overtime

- 1. Choose the box next to the different types of overtime calculations that you utilize.
- 2. Set the threshold of hours at which overtime begins.
- 3. Set the day when the week starts.
- 4. **(Optional)** check the different hours types that are included in overtime calculations. Most users leave all these boxes UNCHECKED.
- 5. Click Save.



Navigation Dashboard	General Display Pay Period Preference	Pay Period and OT Advanced	Tutorials							
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Adding Employees

Click the large button on the left navigation bar in Admin mode named **Employees.**

Create an Employee Record

Click the Create New Employee button

All that is required is to enter the employees **First Name** and **Last Name**. Additional information can be entered at this or another time. Entering a password for the employee to clock in and out with is strongly recommended.

Employee Training

Simple Clock Actions

There are two ways for an employee to clock in and out.

The first is to find their name on the main screen, double-click on it, and enter their password. Once done this **Clock Actions Menu**, on the right, will appear.

The second way is to use the **Quick Search** bar in the bottom left corner. Enter your name or employee id in the first field named **Employee Name or ID.** Then enter your password in the **Password** field and Click the **Go** button. After using the **Quick Search** bar, the **Clock Action Menu** will pop up for that employee.

× Password

Clock Actions Menu	? ×
	Launch Employee Options
Grey, David: 1	
Current Status OClocked In	
Available Clock Actions Clock In Clock Out	
Comment	
Y Approaching OT Y This Week: 2h 19m 37h 41m to Weekiy OT	6%
	OK Cancel

There are additional ways that employees can interact with TimeClick. Each can be accessed through the **Launch Employee Options** button within the **Clock Actions Menu**.

Messages Tab

Quick Search Employee Name or ID

How to read a message

To read a message on the message board,

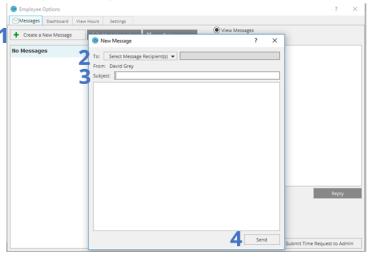
 Select the message from the list of messages. Bold means unread.

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+ Crea	ate a New Messag	ge 60	Mark Unread	X Delete		View Sent Messages	
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08/02/17	System Admin	Approved: Sic	k 07/31/17	2			
08/02/17	System Admin	Approved: Va	cation 08/04/17	~	***Automat	ed Message***	
07/27/17	System Admin	Approved: Va	cation 07/28/17 (Re	versed)	Status: Appr	oved	
07/27/17	System Admin	Denied: Vacat	ion Request 07/28/	17	8h 0m Vacat	ion for 08/07/17	
							Reply
							Submit Missed Action to Ac
							Submit Time Request to Ad

- 2. The message will display to the right of the list of messages.
- 3. Double click on the message and it will open in a separate window.

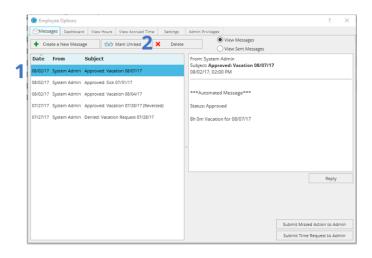
How to create a new message

- 1. Click Create a New Message.
- 2. Select Message Recipients.
- 3. Type a subject and a message.
- 4. Click Send.



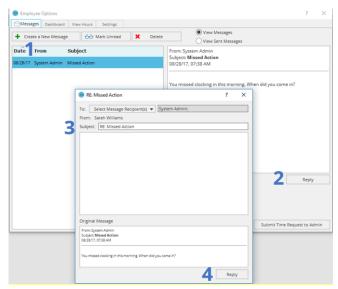
How to delete a message

- 1. Select the message you would like to delete.
- Click the **Delete** button **Note:** When a message has been deleted, it cannot be retrieved.



How to reply to a message

- 1. Select the message.
- 2. Click Reply.
- 3. Type in a message.
- 4. Click Reply.



How to Submit a Missed Action to Admin

Missed actions are very common, an example would be if an employee forgot to clock out yesterday and came in and clocked in. They can save the Admin time by submitting a missed action for the Admin to review and accept.

- 1. Click the **Submit Missed** Action to Admin button.
- 2. Select the correct date and select the **Clock Action** and time.
- 3. Type in a quick message.
- 4. Click **OK**.

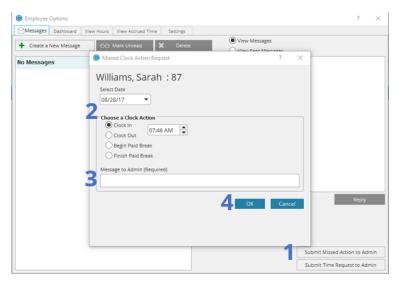
How to Submit a Time off Request to Admin

Click the Submit Time Request to Admin button.

Submitting a Single Day Approval Request:

- 1. Select the date of the event.
- 2. Select the Time Action.
- 3. Put in the Total Time under the **Duration** box.
- 4. (Optional) Type a message for the Admin.
- 5. Click **Send** in the bottom right corner.

I Time Request	?	×
Date 5/5/2017 Select from Date Range Duration		
Select Time Action	0 min	
	0 11111	
- Available Hours		
Vacation 0 hrs		
Message to Administrator (optional)		
5	Send	



Submitting a Multiple Day Approval Request:

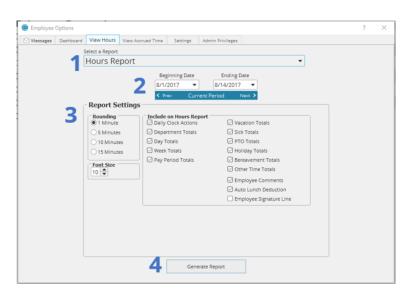
- 1. Within the above Time Request window, check the box that says **Select from Date Range**.
- 2. Change the dates to the correct date range.
- 3. Select the correct Time Action.
- Enter the correct amount of time for each individual day.
- 5. (Optional) Write a message to the Admin.
- 6. Click Send.

Select Time Action	Sunday	Monday	5/14/2017 Tuesday	▼ to 5/2 Wednesday	0/2017 Thursday	Select From	Date Range	Selected Dates
Vacation Vacation Vacation 0 hrs Vacation 0 hrs	14 V Include Duration B hrs O 0 min O	Include Duration B hrs C 0 min C Iministrator (option	16 V Include Duration 0 hrs + 0 min +	17 C Include Duration 8 hrs 0 min	18 V Include Duration 8 hrs 0 0 min 0	19 V Include Duration 8 hrs v 0 min v	20 V Include Duration 8 hrs V 0 min V	05/14/17 8h 0m 05/15/17 8h 0m 05/17/17 8h 0m 05/18/17 8h 0m 05/19/17 8h 0m 05/20/17 8h 0m
						6	Send	

View Hours Tab

How to run a report

- 1. Select a Report from the drop down menu.
- If prompted enter a beginning and ending date, or use the **Prev** and **Next** buttons to select other pay periods.
- 3. Set Report Settings.
- 4. Click Generate Report.



View Accrued Time Tab

In this tab you are capable of reviewing your accrued time balances; at what rate you receive them, and your accrued time history. You can submit a time request here. For instructions on how to submit that time request, refer to How to Submit a Time off Request to Admin, under Messages Tab. This tab only appears if you have enabled accrued time in the Admin Mode.

Settings Tab

How to change my password

- 1. Click the Change Password button
- 2. Enter your current password
- 3. Enter your new password and re-enter it
- 4. Click the **OK** button

Admin Privileges Tab

The Admin Privileges tab is available to only those who have been made Restricted Administrators, by the Main Administrator.

To enter **Restricted Admin Mode** Click the **Launch Restricted Admin Mode** button.

After clicking the button, it will launch restricted admin.

Reports

To access the reports you need to log into the Admin Mode.

Click the button on the Admin Navigation Bar that says **Report Center**.

How to Run a Report

- 1. Select a Report.
- 2. Choose who to include in the report.
- Enter a beginning and ending date, or use the **Prev** and **Next** buttons to select other pay periods.
- 4. **(Optional)** if custom settings have already been set; select the custom settings for the report.
- 5. Set Report Settings.
- 6. Click Generate Report.

Messages	Dashboard	View Hours	Settings	Admin Privileges		
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0		+ Create	a New Mess	age 60 Mark Unre	ad 🗙 Delete	View Messages View Sent Messages
Emplo	oyees	No Messag	jes	*		
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Modify	Times					
2	2					
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						Reply
						Save

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	Default Settings			•
Modify Times	Condensed Hours Report S	ettings		
	Sorting Alphabetical	Daily Clock Actions	Report Vacation Totals	
Accrued Time	C Employee ID	Day Totals	Sick Totals	
+/	Reverse Order	Week Totals	PTO Totals	
- /	Rounding	Pay Period Totals	Holiday Totals	
Utilities	1 Minute	Breaks	Bereavement To	
S A	O 5 Minutes		Other Time Tota	als
X	O 10 Minutes		Auto Lunch Dec	duction
	O 15 Minutes		New Page for Ea	ach
Report Center	Display Hours			
	Decimal (e.g. 8.25 h)			
	Hours and Minutes (e.g. 8h 15m)			
Preferences				
Q.	Font Size			
Q		Generate Report	:	