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# *Universal Time Clock™ Product User Guide*

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***SB-100 PRO 2.5®***



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# SB-100 PRO 2.5 Universal Time Clock User Guide

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# Chapter 1 | Getting Familiar with Your Time Clock

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## Introduction

### Welcome

Welcome to Universal Time Clock 2.5 software!

Thank you for choosing Icon Time Systems, we appreciate your business.

Our mission is to provide our customers with ease-of-mind through our quality products and excellent customer service. All of us at Icon Time Systems wish to thank you for placing your trust in our products. We pride ourselves on being innovators in the time and attendance industry, by developing products that are quick to install, simple to operate and reliable.

Use this guide to learn how to use your Universal Time Clock to perform essential tasks that will make tracking employee time, as well as your payroll processes, more efficient.

The Universal Time Clock system offers breakthrough web-enabled technology that brings the simplicity of embedded software to your time and attendance system, all without requiring Internet access. With the Universal Time Clock, you will be able to track and manage your employees' time and attendance, add employees, edit timecards, run and export reports, and much more directly from your Web browser.

Your Universal Time Clock can be connected directly to your computer via USB, Ethernet connection, or to your network via Ethernet. For instructions on connecting your employee time clock, please refer to the Quick Start Guide that came in your time clock package.

## System Requirements

- Windows PC, Mac, Linux, Android, iOS, iPhone, iPad or any other device that uses a web browser.
- One available Ethernet port on Network or PC, or an available USB port on Windows PC.
- If connecting remotely over the Internet, Network and Internet connection is required.
- USB connection requires Windows Operating System (XP and above).
- QuickBooks Plug-in and the ADP Export programs require Windows Operating System (XP and above) and can be found on the Setup Wizard / Documentation CD included.

**Note:** If you are using your Universal Time Clock with a Macintosh computer, you must connect your time clock to your network using Ethernet.

## Features

The Universal Time Clock can be found in two distinct models: the SB-100 PRO 2.5 and the RTC-1000 2.5.

- The **SB-100 PRO 2.5** Universal Time Clock offers a basic set of features at an entry level price and is designed for small companies that do not require a lot of features. The SB-100 PRO 2.5 comes standard with 25 employees and is upgradeable up to 250 employees.
- The **RTC-1000 2.5** Universal Time Clock is the perfect fit for a growing business that requires a time clock that can keep up with changing needs. This time clock is ideal for those companies looking for a feature-rich product that is fully supported by a nationwide network of experts. The RTC-1000 2.5 comes standard with 50 employees and is upgradeable up to 250 employees.

## Feature Comparison Chart

Feature	SB-100 PRO	RTC-1000
Employee Capacity	25 (upgrade to 250)	50 (upgrade to 250)
Proximity Entry	Badges Sold Separately	15 Badges Included
Remote Internet Access Option	Additional Setup Required	Additional Setup Required
Paid Break Tracking	✓	✓
QuickBooks, ADP and Paychex Flex Interface	✓	✓
Auto Deduct Lunch	✓	✓
Timecard & Attendance Report	✓	✓
Holiday / Non-worked Hours Tracking	✓	✓
Global Add Hours	✓	✓
Track Tips, Job Numbers, or Piece Counts		✓
Department Support		✓
Timecard by Department Report		✓
Supervisor Logins with Employee Assignment		✓
Connect Up-to 16 Clocks Together (250 employee max)		✓
Custom Employee PIN #		✓
Customize Report Filter Options		✓
Notes by the Punch		✓
Employee Web Punch Entry		5 Employee License Included

## Upgrade Comparison Chart

Upgrade Feature	SB-100 PRO	RTC-1000
<b>Benefit Tracking</b> <ul style="list-style-type: none"> <li>Accrue Benefit Hours for Vacation, Sick, and Personal</li> </ul>	✓	✓
<b>Upgrade Employee Capacity</b>	50, 100 or 250	100 or 250
<b>Proximity Entry Badges</b> <ul style="list-style-type: none"> <li>Wave badge in front of clock, to clock In or Out</li> <li>Sold in packs of 15 or 25</li> </ul>	Badges Sold Separately	15 Badges Included
<b>Employee Web Punch Entry</b> <ul style="list-style-type: none"> <li>Employee Clock In/Out from Web browser on Smart Phone, Tablet or work station</li> <li>Sold in packs of 5, maximum of 25 employees can use Web Punch entry</li> </ul>	✓	5 Employee License Included
<b>Email Alerts</b> <ul style="list-style-type: none"> <li>Email Timecard Reports to one or more recipient</li> <li>Send email alerts to Supervisor for high hours, low hours, approaching overtime</li> <li>SSL Data Encryption for increased security</li> </ul>	✓	✓

## Connection / Setup

Refer to the Universal Time Clock **Quick Start Guide** for instructions on setting up your employee time clock's connection and logging into your time clock for the first time.

You can find a copy of the Quick Start Guide on the Setup Wizard / Documentation CD supplied with the time clock or on our website at the link below.

<http://www.icontime.com/index.php/support/knowledge-base-search/44-user-manuals/311-sb-100-pro-2-5-quick-start-guide>

## Logging In

To log in and view employee information and punch details, enter the time clock's assigned Internet Protocol (IP) address into your Internet browser address field. You will not need to enter www at the beginning of the address.

You must enter the address exactly as displayed below. For example, if the assigned address is 10.10.10.10, enter that text directly into the address field, preceded with **http://**.



**Note:** If you are logging in using USB or Ethernet direct to PC, click the Employee Time Clock Login icon on your desktop or follow the same instructions described above, entering 127.0.0.1 as the IP address.



## Support and Troubleshooting

For your convenience, troubleshooting tips and how-tos can be found in [Chapter 8 | Troubleshooting and Frequently Asked Questions](#). In addition, our technical support site lists more troubleshooting tips and how-tos to assist you with the Universal Time Clock. You can reach this site at [www.support.icontime.com](http://www.support.icontime.com).

This system includes a 30-day trial of our [Gold Technical Support Plan](#), which includes unlimited telephone support and remote assistance. Support can be reached Monday through Friday from 7:30am to 4:30pm (PST) at (800) 847-2232 option 1 or via email at [support@icontime.com](mailto:support@icontime.com).

## Payroll Interfaces

Your time clock package includes QuickBooks, Paychex Flex, and ADP Payroll Export interfaces, as well as a CSV export. The Paychex Flex export can be downloaded directly from the clock software under: Go to **Reports | Payroll**.

The QuickBooks Plug-in and ADP Payroll Export programs are compatible with Windows operating systems, only.

To download the Payroll Export program, click on the appropriate link below:

- **QuickBooks** – [www.icontime.com/utc-quickbooks-export](http://www.icontime.com/utc-quickbooks-export)
- **ADP** – [www.icontime.com/utc-adp-payroll-export](http://www.icontime.com/utc-adp-payroll-export)

## Register your Time Clock

We highly recommend that you register your employee time clock to ensure that you receive email notification of free software updates, instate your manufacturer's warranty, and 30 days of free technical support.

Register Your Time Clock at - [www.icontime.com/universal\\_time\\_clock\\_registration.asp](http://www.icontime.com/universal_time_clock_registration.asp)

## Navigating the Time Clock Software

The time clock interface is designed to allow you to quickly and easily complete your tasks and run your reports. In this chapter you will learn how to navigate through your time clock application. Application navigation is done through six distinct menus: Home, Lists, Reports, Files, Settings, and Help. Moving your mouse cursor over each icon displays the individual drop-down menu items.



## Home Page

When you first log into your time clock application, the Home page displays automatically. The Home page provides a quick glance at the activity on your time clock, including notifications of custom alerts. The Home page also contains helpful links to configure your software.

## Current Alerts

The Home page displays important system alerts or alerts you set up in the program, with the time and date they occur.

For instructions on customizing your alert settings, refer to [Setting Your Alert Preferences](#) in Chapter 2.

When you no longer want to be notified of a particular task or alert, check the checkbox next to that item in the Ignore column, then click **Submit**. If you would like to see past alerts set to ignore, click **Show All**.

To view the details of the alert, click the alert link in the **ALERT/TASK** list

## Lists Menu

Access a list of your employees from the Lists menu. Adding, modifying, and deleting employees is done from the Employee List. Go to Chapter 3 | Setting Up Your Employees [Chapter 3 | Setting Up Your Employees](#) for instructions on setting up employees in the SB-100 PRO 2.5.

## Reports Menu

Your time clock has two basic reports that make it quick and easy to get the information you need to complete your work and process payroll. Use the Reports menu to access the Timecard and Attendance reports. Refer to [Chapter 4 | Generating Reports](#), for additional information on generating and customizing reports.

## Files Menu

Use the Files menu to back up data, restore data back-ups, delete unneeded data, and update your employee time clock. Refer to

### [Exporting to Paychex Flex](#)

[When creating](#) a Paychex Flex export, a text file is created with the employee's time card data. At the end of the pay period, compile employee data and import it to Paychex Flex to process your Payroll.

Note: Contact your New Client Specialist to assist in setting up your Paychex Flex account to accept the time clock export file.

1. Select the timeframe of the data from the Pay Period dropdown menu.
2. Click **Submit**.

**Note:** You are notified if any employees do not have an assigned Paychex employee ID. The message and the option to view a list of these employees' displays at the bottom of the Payroll report screen.

## Settings Menu

Use the Settings menu to customize your payroll, overtime, punch, device, and alert preferences. Before running any reports, set your preferences as described in [Chapter 2 | Setting Your Time Clock Preferences](#).

## Help Menu

The Help menu gives you quick access to the Help Center and to view the About Your Clock page for your time clock.

## Using Your Time Clock Terminal

It is important for you to understand the features and functions available on your time clock terminal. Take the time to familiarize yourself with these features. In this section, we will give a brief overview of the features available.

### Time Clock Key Functions

- **In/Out** - Used by the employee to punch IN or OUT.
- **Break Transfer** - Used by the employee to transfer into a Department or Paid Break.
- **Info** - Displays daily and weekly hourly totals for the employee.
- **Supervisor Mode** - Allows supervisor to access advanced employee time clock terminal options.
- **^** or **v** - Used to scroll up or down through menu options.
- **Enter** - Selects and saves menu options.
- **Clear** - Returns user to the previous menu option.



### Employee Functions at the Clock

Employees use the time clock to enter their work information. This section describes how employees will use the time clock for daily activities.

#### Punching IN and OUT

The employee procedure to punch In and Out at the time clock may vary depending on the entry method selected [Chapter 3 | Setting Up Your Employees](#), for additional information.

The punch entry methods procedures are described below.

## Validated Entry Method

The Validated Entry Method is the most common and recommended method for method for punching in/out with a time clock.

1. Enter the assigned PIN/badge number on the time clock terminal. The employee name displays on the time clock. Under the display name, the In and Out options display. One of these options will be flashing.
2. Press the corresponding **IN** or **OUT** key on the time clock. Once the punch is accepted, a message displays stating they punched In or Out.
3. After an employee punches Out, the total hours worked for the shift displays on the time clock display. Additional hours information can be viewed by pressing the **Up** or **Down** key on the time clock.

**Note:** This option is activated in the **Device Preferences** tab as discussed in [Chapter 2 | Setting Your Time Clock Preferences](#).

## Non-Validated Entry Method

1. Enter the assigned PIN/badge number on the time clock terminal. The employee name displays on the time clock. Under the display name, the In and Out options display.
2. Press the corresponding IN or OUT key on the time clock. Once the punch is accepted, a message displays stating they punched In or Out.
3. After an employee punches Out, the total hours worked by the employee for the shift displays on the time clock display. Additional hour information is available to view by pressing the **Up** or **Down** key to view total hours for the day and the week.

## Automatic Entry Method

This method is also known as "Swipe and Go", by entering your assigned PIN/badge number on the time clock terminal.

1. The time clock displays the employee name and Entry Recorded. You are not allowed to make any other selections at the employee time clock terminal. This provides a simple and quick method for punching In and Out at the employee time clock.
2. The employee time clock automatically determines if the punch is an In or Out punch.


**Note:** You cannot use "Show Hours" at the employee time clock terminal or make any lunch override or hours adjustments to these types of punches. Refer to [Adding a Punch](#) in Chapter 4, for additional information.

## Proximity Badge Entry (Badges Sold Separately)

Proximity badges allow employees to punch In/Out by waving the badge in front of the time clock keypad. There are many benefits to using proximity badges; minimizing buddy punching, quicker punching in and out, and no PIN to memorize.

Proximity badges are assigned at the time clock terminal. Follow the instructions below to assign a proximity badge to an employee.

1. Enter into Supervisor Mode at the time clock terminal.

2. Press  on the time clock terminal.
  - Enter your security code. The default security code is **00 00 00**.
3. Scroll through the options using the Down key until you find Assign Badges, then press **Enter**.
4. The time clock displays Enter ID Number. Use the keypad to enter the assigned PIN/badge number of the employee you wish to assign the badge, press **Enter**.
5. Wave the badge in front of the time clock keypad (over the 5 key is the optimal location to wave the badge). The time clock displays "Assigned" when the badge is assigned to the employee.
6. The employee can now use the badge to punch In and Out. Repeat the steps above for each employee.

## Web Punch Time Clock Entry

The Web Punch Time Clock allows you to capture your employees' time anytime, anywhere using a web browser based time clock that runs on the network (LAN, WAN) or Internet.

Web Punch Time Clock is offered in packages of 5 licenses and will allow a maximum of 25 employees to clock In using a Web browser on their PC, smart phone or tablet. For more detailed information on the Web Punch Time Clock, refer to [Chapter 6 | Accessories and Upgrades](#).

## Tracking Paid Breaks

The Universal Time Clock includes one department that can be used to track paid breaks. Tracking paid breaks allows you to better manage the time your employees are taking during their paid break periods.

**Note:** This option must be activated for each individual employee, as discussed in [Chapter 3 | Setting Up Your Employees](#).

1. To track time that an employee spends on their paid break, the employee must be assigned to the break department and must transfer into the break department.
2. To transfer into the break department, follow the instructions below. The employee must already be punched In to the employee time clock.
3. Enter the assigned PIN/badge number on the time clock terminal, or wave the proximity badge in front of the number pad.
4. Instead of pressing Out, press the **Break Transfer** key on the time clock

## Chapter 2 | Setting Your Time Clock Preferences

Before accurate reports can be generated and employee punch details are calculated correctly, you must set your time clock rules and preferences.

### Setting Your Pay Preferences

You can access your Pay Preferences in one of two ways:

- Click **Set up Your Pay Period** in the Alert/Task list
- Select **Preferences** from the Settings menu.

Follow the instructions below to set your Pay Preferences.



Pay	Punch	Device	Alerts	Custom Fields
<b>PAYROLL PREFERENCES</b>				
Pay Period Type: <input type="text" value="Weekly"/>				
Last Pay Start: <input type="text" value="12/29/13"/>				
This Pay Start: <input type="text" value="01/05/14"/>				
Next Pay Start: <input type="text" value="01/12/14"/>				
Day Start: <input type="text" value="12:00"/>				
Week Start: <input type="text" value="Sun"/>				

1. Select the applicable option from the **Pay Period Type** drop-down menu:
  - **Weekly** - Employees are paid once per week
  - **Bi-weekly** - Employees are paid every two weeks
  - **Semi-Monthly** - Employees are paid twice per month
  - **Monthly** - Employees are paid once per month
2. If you select the semi-monthly pay period, two additional date fields display that must be completed.
  - Type the first day of the month that your pay period begins in the **Start Semi-monthly on** field.
  - Type the second day of the month that your pay period begins in the **and on** field.
3. Click in the **Last Pay Start** field to open the calendar and select the date that your previous pay period started.  
**Tip:** Use the << and >> arrows to select the year. Use the < and > arrows to select the month.
4. Click in the **This Pay Start** field to open the calendar and select the date that your current pay period started.
5. Click in the **Next Pay Start** field to open the calendar and select the date that your next pay period will start.
6. Type the time of day that your workday begins in the **Day Start** field. You only need to modify this setting if your company has a 24-hour work schedule and needs to accommodate overnight shifts; it is recommended that this setting remain at 12:00am.
7. Select the day of the week that your work week begins from the **Week Start** drop-down menu. The company's weekly overtime calculations are based on the week start set for the company.

### Setting Your Overtime Preferences

Your Overtime Preference settings are on the Pay tab under Payroll Preferences. The Universal Time Clock comes standard with two levels of daily and weekly overtime and consecutive day overtime.

Overtime (OT1) is calculated at time-and-a-half (1.5) the rate of pay, and double overtime (OT2) is calculated at two times the rate of pay (2.0).



<b>OVERTIME PREFERENCES</b>		
Day OT1 After	<input type="text" value="8.00"/>	Hours
Day OT2 After	<input type="text" value="99.00"/>	Hours
Week OT1 After	<input type="text" value="40.00"/>	Hours
Week OT2 After	<input type="text" value="99.00"/>	Hours
Consecutive Day OT	<input type="text" value="No"/>	

Follow the instructions below to set your Overtime Preferences.

3. To set daily overtime rules, type the number of hours an employee must work in one day before they receive overtime pay in the **Day OT1 After** and the **Day OT2 After** fields as required. If your company does **not** pay daily overtime, type **99**.
4. To set weekly overtime rules, type the number of hours an employee must work in one week before they receive overtime pay in the **Week OT1 After** and the **Week OT2 After** fields as required. If your company does **not** pay weekly overtime, type **99**.
5. To set consecutive day overtime rules, change the **Consecutive Day OT** drop-down menu to **Yes**. This option will pay OT1 and/or OT2 as selected to employees on the seventh consecutive day of work, regardless of hours worked during the work week. This rule is most commonly used by unions and in California. If your company does **not** pay consecutive overtime, change the **Consecutive Day OT** drop-down menu to **No**.

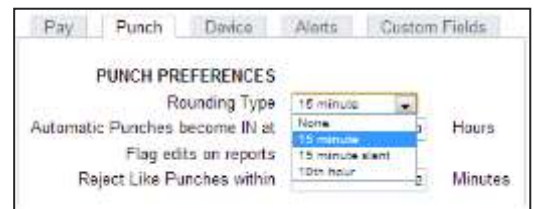
**Note:** Making a change to the overtime options prompts the time clock to restart. Doing so will make the time clock unavailable up to or exceeding 15 minutes.

6. Click **Submit** to save your settings and return to the Home page.

## Setting Your Punch Preferences

From the **Pay Preferences** tab, select the **Punch** tab. The Punch Preferences screen displays.

**Note:** The rounding rule selected affects all punches system wide. The original punch time remains unchanged on the employee timecard. The punch hours round according to the rounding rules set.



Follow the instructions below to set your Punch Preferences.

1. Select the applicable rounding type from the **Rounding Type** drop-down menu

The available rounding types are:

- **None:** (No Rounding) Accumulates 100% of all time registered on the clock. Punches are calculated to 1/100th of an hour.
- **15 Minute:** Rounds and calculates punches from the nearest quarter hour (15 minutes). The split occurs in the middle of each quarter hour. This rounding option is also referred to as 7/8 rounding.

To illustrate:      7 minutes 59 seconds *rounds back*  
                             8 minutes 00 seconds *rounds forward*

Example:            A punch at 7:52am would calculate as 7:45 a.m.  
                             A punch at 7:53am would calculate as 8:00 a.m.

- **15 Minute Slant:** Quarter hour rounding similar to above except the break point occurs on the 5th minute or 10th minute depending on whether it is an IN punch or an OUT punch. (10/5 split on IN punch, 5/10 split on OUT punch.)

To illustrate:      An IN punch of 4 minutes 59 seconds *rounds back*  
                             An IN punch of 5 minutes 00 seconds *rounds forward*



An OUT punch of 9 minutes 59 seconds *rounds back*  
An OUT punch of 10 minutes 00 seconds *rounds forward*

Example: An IN punch at 7:49am would calculate as 7:45 a.m.  
An IN punch at 7:50am would calculate as 8:00 a.m.

- **10th Hour:** Rather than rounding the punch hours, this selection calculates punches from the tenth hour point and advances each six minutes.

Minutes 10 <sup>th</sup>	Minutes 10 <sup>th</sup>
00-05 = .0	30-35 = .5
06-11 = .1	36-41 = .6
12-17 = .2	42-47 = .7
18-23 = .3	48-53 = .8
24-29 = .4	54-59 = .9

To Illustrate: An in punch from :00 minutes after the hour to :05 after the hour rounds to the top of the hour (:00).  
An in punch from :30 minutes after the hour to :35 minutes after the hour rounds to :05.

Example: An IN punch at 7:30am would calculate at 7.5 a.m.  
An OUT punch at 4:05pm would calculate as 4.0 p.m.

2. The **Automatic Punches become IN at** field automatically makes the next punch an In punch after a determined number of hours. This option is convenient if an employee forgets to punch Out.
3. This option is only used when an employee entry method is set to Automatic. Refer to [Chapter 3 | Setting Up Your Employees](#), for additional information.

If you plan on using the Automatic Entry Method, enter the number of hours that must pass before the next punch automatically becomes an in punch. Unless your employees regularly work more than 15 hours a day, the default setting is recommended.

4. Check the **Flag edits on reports** checkbox to flag manually edited punches on reports. If checked, all edited punches are marked with E.
5. Type the number of minutes in the **Reject Like Punches** within field if an employee accidentally tries to enter the same type of punch at the time clock. Within the minutes specified, the second punch is ignored.
6. Click **Submit** to save your settings and return to the Home page.

**Note:** Making a change to the rounding options will prompt the time clock to restart. Doing so will make the time clock unavailable up to or exceeding 15 minutes.

## Setting Your Device Preferences

From the **Punch Preferences** tab, select the **Device** tab to go to the **Device Preferences** screen. Important information such as your Database Version, Software Version, and time clock serial number will appear at the top of this section

Follow the instructions below to set your Device Preferences.

1. Select if you want to display minutes on your reports in decimal or hh:mm (minutes) format from the **Calculated Time Format** drop-down menu.
2. Check the **Hide Employee PIN** checkbox to hide employee PINs (ID numbers) at the time clock terminal, preventing coworkers from viewing another employee's PIN.
3. Type a unique 6-digit security code in the **Supervisor Code** field to secure the employee time clock.

**Important:** You need this code to access Supervisor Mode on the employee time clock. The default supervisor code is **00 00 00**.

The screenshot displays the 'Device Preferences' configuration interface. At the top, there are tabs for 'Pay', 'Punch', 'Device', 'Alerts', and 'Custom Fields'. Below the tabs, the following information is shown:

- Database Version: 1007201
- Software Version: 3431
- Serial Number: D088-669-932

The 'DEVICE PREFERENCES' section includes the following settings:

- Calculated Time Format: Hundredths (dropdown menu)
- PIN Number Length: 3 (dropdown menu) Digits
- Hide Employee PIN:
- System Prompt 1: Enter ID Number (text input)
- System Prompt 2: Enter ID Number (text input)
- System Prompt 3: Enter ID Number (text input)
- Supervisor Code: 00 00 00 (text input)
- Lock Keypad:
- Use Daylight Savings:
- Default Attendance Report To: Today (dropdown menu)
- Default Timecard Report To: This Pay (dropdown menu)
- Refresh Home Page Every: 1 (text input) Minutes
- Use SSL Server:
- Use Popup Windows for Edits:
- Use Batch Edits:
- Show total hours at the clock:

4. Check the **Lock Keypad** checkbox to lock the keypad and prevent keypad entry of employee ID numbers (PIN) at the employee time clock. Use this option if you purchased proximity badges for your employee time clock and you do not want employees using the keypad.
5. Check the **Use Daylight Savings** checkbox if you want the time clock to automatically adjust time for daylight savings.
6. Select the default time frame to view when you open the Attendance Report screen from the **Default Attendance Report To** drop-down menu.
7. Select the default time frame to view when you open the Timecards Report screen from the **Default Timecard Report To** drop-down menu.
8. Type the number of minutes to set how often alerts on the Home page refresh in the **Refresh Home Page Every** field. We recommend setting this to 10 to prevent the system from running slow. If your system runs slow, type a larger number for the refresh time.
9. Check the **Use Popup Windows for Edits** checkbox to have a separate pop-up window display when editing a punch in a report screen. This allows you to view the original report screen in the background while you edit. We recommend keeping this option checked.
10. Check the **Use Batch Edits** checkbox to complete multiple punch edits on your report before updating the report. To batch update the report screen with your edits, click **Refresh** in the upper right of the report screen.
11. Check the **Show total hours at the clock** checkbox to have the time clock automatically report the employee's total daily hours after the employee punches out.
12. Click **Submit** to save your settings and return to the Home page.

- **Use SSL Server:** This option is visible when the Email Alerts upgrade pack is enabled. Use SSL data encryption to encrypt data, ensuring all data passed between the time clock and web browser remains private.
- **Web Punch Preferences:** Set Web Punch Preferences settings when web punching is allowed. For additional information on setting up your Web Punch Preferences, refer to [Chapter 6 | Accessories and Upgrades](#).
- **SMTP Preferences:** SMTP Preferences (Outgoing Email Settings) should be customized if you wish to receive automatic email alerts or email the Timecard Report to an individual. An SMTP server is a computer that receives outgoing mail messages from users and routes them to their intended recipients. For additional information on setting up your SMTP server, refer to [Chapter 6 | Accessories and Upgrades](#).

## Setting Your Alert Preferences

Select the **Alerts** tab in the **Preferences** screen to setup the alert notices displayed on the Home page. The Home page updates based on your time setting for the **Check Alerts Every** field described below.

Pay	Punch	Device	Alerts	Custom Fields
<b>ALERT PREFERENCES</b>				
	Alert Low Hours at	<input type="text" value="0.00"/>	Hours per punch	
	Alert High Hours at	<input type="text" value="14.00"/>	Hours per punch	
	Alert Maximum Time at	<input type="text" value="24.00"/>	Hours per punch	
	Alert Day Overtime OT at	<input type="text" value="2.00"/>	Hours remaining	
	Alert Week Overtime OT at	<input type="text" value="8.00"/>	Hours remaining	
	Check Alerts Every	<input type="text" value="15"/>	Minutes	
	Update Employee Hours Every	<input type="text" value="15"/>	Minutes	

1. Type the least amount of hours an employee can work per punch in the **Alert Low Hours at** field. If an employee works a shift less than the hours specified, an alert generates. To disable this alert, set the alert value to **0**.
2. Type the maximum amount of hours an employee can work per punch in the **Alert High Hours at** field. If an employee works a shift more than the hours specified, an alert generates. To disable this alert, set the alert value to **99**.
3. Type the number of hours overtime goes into effect for an employee in the **Alert Day Overtime OT at** field. This option triggers an alert before employees reach daily overtime by using the daily overtime value that you set under Overtime Preferences.

**Example:** If you have Day OT1 set to 8 hours and Alert Day Overtime OT set to 2 hours, an alert posts to the Home page when the employee reaches 6 hours worked for the day.

4. Type the number of hours overtime goes into effect for an employee in the **Alert Week Overtime OT at** field. This option triggers an alert before employees reach weekly overtime by using the weekly overtime value that you set under Overtime Preferences.

**Example:** If you have Week OT1 set to 40 hours and Alert Week Overtime OT set to 8 hours, an alert posts to the Home page when the employee reaches 32 hours worked for the week.

5. Type the number of minutes to check alerts in the **Check Alerts Every** field. New alerts are checked and posted to the Home page based on the time entered here. To maximize system speed and performance, we recommend setting this value to 10 minutes or more.
6. Click **Submit** to save your settings and return to the Home page.

For additional Alert configuration, select **Settings | Alert Setup**.

## Alert Setup

Using the Alert Preferences set earlier, select **Settings | Alerts Setup**, and follow the instructions below to set up Home page and email alerts (with Email Alerts Upgrade).

- **Enabling/Disabling Alerts:** To disable an alert, deselect the checkbox in the far left column. This prevents the alert from being posted on the Home page
- **Lifetime:** Use the drop-down menus under the **Lifetime** column to select the amount of time the alert remains on the Home page. After that time, the alert is automatically removed.
- **E-mail:** If you have purchased the Email Alerts upgrade, select how often you would like an e-mail alert sent from this drop-down menu.

	DESCRIPTION	LIFETIME
<input checked="" type="checkbox"/>	High Hours	1 Day
<input checked="" type="checkbox"/>	Low Hours	1 Day
<input checked="" type="checkbox"/>	Maximum Hours	1 Day
<input checked="" type="checkbox"/>	Approaching Daily Overtime	1 Day
<input checked="" type="checkbox"/>	Approaching Weekly Overtime	1 Day
<input checked="" type="checkbox"/>	Check for Updates	Forever
<input checked="" type="checkbox"/>	Backup Reminder	1 Week
<input checked="" type="checkbox"/>	Punch Notify	1 Hour

- **Repeat:** If you have purchased the Email Alerts upgrade, select how often you would like an e-mail alert to be resent from this drop-down menu.
- **Recipient:** If you have purchased the Email Alerts upgrade, type the alert recipient's e-mail address. For multiple addresses, add a space or comma in between each e-mail address.

**Tip:** We recommend disabling any unused alerts to minimize the resources used by your time clock and optimize system performance.

## Creating Custom Fields

The Universal Time Clock offers 10 additional fields for tracking static information in Custom Fields. These fields display in the system or employee pages.

**ADP EXPORT:** Use the User Field to track the employee's ADP Payroll ID. Refer to the ADP Export User guide installed with the ADP Payroll Export for instructions.

- **System:** These fields display on the bottom of the Custom Fields page.
- **Employee:** These fields display on the bottom of each employee's Edit Employee page.

Follow the instructions below to set your Custom Fields.

1. Type the title for the custom information in the **Title for Field X** field (X being the field number).
2. Select where this custom field should display from the **Assign Field X to** drop-down menu (X being the field number).
3. Click **Submit** to save your settings and return to the Home page.
4. Go to the new custom field on the page specified and complete the applicable field as needed.

## Chapter 3 | Setting Up Your Employees

In order for your employees to use the time clock, you must enter them into the application. This section discusses how to enter employees.

SB-100 PRO 2.5 comes with a 25 employee limit and can be upgraded to handle up to a total of 250 employees. Employees must use a pre-assigned 3 digit ID numbers (PIN).

### Employee List

A list of your employees and their ID numbers (PINs) are in the Lists Menu under Employees.

**Make Employees Inactive:** Making an employee inactive removes them from the Employee List and hides the employee data from the reports.

Inactive employee punch data remains stored in the application.

- To make an employee inactive, deselect the checkbox in the far left column, click **Submit**.
- To select all employees, and make them active, click on **Select All**.
- To make all employees inactive, click **Select None**.
- To show inactive employees, click on the **Show Inactive** option.

EMPLOYEE LIST						
		Select All	Select None	Show Inactive		
Active	Payroll ID	Display ID	Last Name	First Name	Time Remaining Before Overtime	
					Daily	Weekly
<input checked="" type="checkbox"/>		667	Employee 667		8.00	
<input checked="" type="checkbox"/>		689	Employee 689		8.00	
<input checked="" type="checkbox"/>		701	Employee 701		8.00	

#### Time Remaining Before Overtime:

- The **Daily** column displays the number of hours left in the day before the employee starts earning daily overtime.
- The **Weekly** column displays the number of hours left in the week before the employee starts earning weekly overtime.
- The **Consecutive Days** column displays the number of days left in the work week before the employee starts earning consecutive day overtime.

To edit employee information, click the employee ID number in the **Display ID** column. This displays the **Edit an Employee** screen.

### Adding Employees

To customize an employee, select an employee or one of the available employee slots. Follow the instructions below to set up an employee.

## Employee Information

- **Payroll ID:** (optional) Enter the employee's payroll ID number provided by the payroll company. This payroll ID is used when generating payroll exports.
- **First Name:** Enter the employee's first name.
- **Middle Initial:** Enter the first initial of the employee's middle name.
- **Last Name:** Enter the employee's last name.
- **Display Name:** Enter the name that the employee will see at the clock and on reports.
- **Address:** Enter the employees address. This field is optional.

EMPLOYEE INFORMATION	
Payroll ID	<input type="text"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
Last Name	Employee 701
Display Name	Empl 701
Address	<input type="text"/>
Note	<input type="text"/>

## Employee Settings

- **PIN/Badges:** The employee PIN number is used to clock In or Out at the time clock.

If you have chosen to use the pre-assigned ID number cards from Step 3 of the Quick Start Guide, use the ID number (PIN) pad to assist you in matching employee names with their assigned ID number.

- **Active:** All employees default to an active status. Deselect this checkbox to make the employee inactive and to hide their name from reports.
- **Track Paid Breaks:** Select this box to track the employees time spent in their Paid Breaks. Read Tracking Paid Breaks in Chapter 1 for instructions on punching In/Out of break.
- **Wage:** To track and calculate the employee wages, enter wage in this field
- **Entry Method:** This option determines the procedure for punching in and out by the employee at the employee time clock. Select the desired method from the drop-down menu.

EMPLOYEE SETTINGS	
PIN/Badges	145
Active	<input checked="" type="checkbox"/>
Track Paid Breaks	<input type="checkbox"/>
Wage	<input type="text" value="0.00"/> Per Hour
Entry Method	Validated <input type="button" value="v"/>

Read a description of the time clock entry methods below and choose your entry method carefully.

- **Validated:** The employee is required to either punch in or out at the employee time clock. The correct option blinks on the time clock display. The employee is required to press the correct key at that time.
  - Example:** If an employee forgets to punch out the day before, they will be required to punch out first before they can punch in for their current shift. The punch information can be edited in the software so the proper punch out time and date is recorded on the reports.
- **Non Validated:** In and out displays under the employee's name at the employee time clock. The employee is required to press the correct key at that time, either **In** or **Out**. Either entry is accepted by the employee time clock.
- **Automatic:** This is also known as "Swipe and Go". After the employee enters their PIN/badge number, the display on the employee time clock displays the employee name and the message, "Entry Recorded". The employee is not allowed to make any other selections at the employee time clock. This provides a simple and quick method for the employee at the employee time clock.

The employee time clock records every punch as an in punch. Every other punch is considered an out punch by the program.

You cannot make lunch overrides or hours adjustments to these types of punches. Refer to the [Adding a Punch](#) section for additional information.

## Lunch Time Deduction

- Enable **Automatic Lunch Deduction** to have the time clock automatically deduct the employee lunch time for the day or the punch pair.
- In the **Lunch At** field, enter the number of hours the employee is required to work before the lunch period automatically deducts from the employee's shift.
- Enter the amount of time in minutes to deduct for lunch (typically 30 to 60 minutes) in the **Lunch Length** field.
- **Deduct:**
  - When **Per Punch** is selected the time worked from the last In punch is used to calculate the lunch deduction time. If an employee goes to break or punches Out before the lunch time is deducted, the Lunch At trigger will be started again.
  - Select **Per Day** to deduct the lunch period using the total hours worked during the day.

LUNCH TIME DEDUCTION	
Automatic Lunch Deduction	Enabled <input type="button" value="v"/>
Lunch At	4.00 Hours
Lunch Length	30 Minutes
Deduct	Per Punch <input type="button" value="v"/>

## Web Punch Time Clock Settings

**Web Punch Time Clock Settings:** Set these settings when Web Punching is enabled. The RTC-1000 2.5 allows for up to 5 employees to punch In/Out using Web Punch. Additional licenses may be purchased. For additional information on this option, refer to [Chapter 6 | Accessories and Upgrades](#).

## Accrual Settings

**Accrual Settings** are used with the benefit tracking and accruals feature included with the Benefit Tracking upgrade. Benefit Accruals allow you to track and manage Vacation, Sick, and Personal Time benefits. Benefit Tracking and Accruals allow you to automate maximum accrual amounts, yearly carryover, and borrowing of benefits.

Set these settings when the Rules Plus upgrade has been enabled and Benefit Accruals are allowed. For additional information on this option, refer to [Chapter 6 | Accessories and Upgrades](#).

## Delete Employee's Punches

**Delete All Punches for this Employee:** Use this option to delete all punches for an employee. This is typically used when an employee leaves the company and you want to re-use the employee ID (PIN).

To delete the employee's punches, click **Delete all punches for this employee**. A confirmation message displays.

Click **OK**.

**Note:** Before purging employee punches, we recommend that you save a backup of your data. This allows you to view that employee's data at a later date.



### [Exporting to Paychex Flex](#)

[When creating](#) a Paychex Flex export, a text file is created with the employee's time card data. At the end of the pay period, compile employee data and import it to Paychex Flex to process your Payroll.

Note: Contact your New Client Specialist to assist in setting up your Paychex Flex account to accept the time clock export file.

5. Select the timeframe of the data from the Pay Period dropdown menu.
6. Click **Submit**.

**Note:** You are notified if any employees do not have an assigned Paychex employee ID. The message and the option to view a list of these employees' displays at the bottom of the Payroll report screen.

## Chapter 4 | Generating Reports

Reports in your application are designed to be intuitive to read and edit; this creates ease and simplicity when generating your reports on payroll day.

The SB-100 PRO 2.5 offers two basic reports, the Attendance Report and Timecards Report.

The Universal Time Clock uses “Click-and-Edit” reports. This means that you can edit the employee and punch data directly from the report. Most of the text that displays on reports are web links that open additional screens or editing options.

Punch information on your reports will update based on the setting entered for *Update Employee Hours Every* in the **Alert Preferences** screen. Read about this in [Chapter 2 | Setting Your Time Clock Preferences](#).

### Reports Overview

Punch information on your reports update based on the setting entered in the **Update Employee Hours Every** field in the **Alert Preferences** screen, as discussed in Section 2, Setting Your Time Clock Preferences. Click **Refresh** at the top of the Report screen to update punch information immediately.

The Attendance report displays all employee punch data sorted by date, whereas the Timecards report displays the same punch data sorted by employee.

EMPLOYEE	TIME IN	AT	TIME OUT
01/02/14			
023-B. Smith	Thu 08:00a	Work	Thu 04:30p
Totals: (Format: Hundredths)			

### Adding a Punch

From the Attendance or Timecards report screen, click **Add Punch** at the top of the report to add a new punch. You may also use this functionality for an In or Out punch on a certain day that does not have a matching punch.

To complete the punch pair, click **Add Punch** on the employee’s timecard to display the **Add New Punch** screen.

Perform the following when adding a punch:

1. Confirm the correct employee. When selecting **Add Punch** from an employee’s timecard, the correct employee’s ID and name display automatically.
2. Select the punch type that you want to add from the **Type** drop-down menu.
  - Automatic allows the time clock to select the appropriate punch type.
  - When adding or editing an Automatic punch, change the punch type from Automatic to Out, if you would like to add a lunch or hours adjustment, as you cannot complete a lunch override r adjust hours to an automatic punch.
3. Click in the **Date** field to use the calendar to select the punch date.
4. Type the time for the punch in the **Time** field. The application assumes a.m., unless otherwise specified.

- For an Out punch, you have the option to enter an additional lunch deduction. Type the number of minutes for the employee lunch deductions in the **Lunch** field.
- For an Out punch, you have the option to enter an additional time adjustment. Type positive or negative values to adjust time for the shift in the **Adjust** field.

**Example:** An employee may be credited an hour of bonus time for additional workload that day. If taking a 60 minute lunch, type **60** in the **Lunch** field, type **1.00** in the **Adjust** field, then click **Submit**. The following posts to the report.

- Click **Submit** to save your changes.

## Adding Non-Work Hours (Holiday and Non-worked)

From the Attendance or Timecards report, click **Add Non-Work** at the top of the report to add a non-work punch. A non-work punch is a punch where the employee was not actually working, but was using benefit time like holiday.

Non-work hours can be assigned to one or more employees across one or more days.

When importing hours to Paychex Online Payroll, the benefit time will automatically be deducted from the accrued time, if you have signed up for Paychex Online Payroll Time Off Accruals.

Perform the following when adding a non-work punch:

- Select **Add Non-Work** from Timecard report.
- Select the employee(s) from the **Select Employees** list.
- Select the applicable punch type that you want to add from the **Type** drop-down menu.
- The available punch types are:
  - Nonworked – used for employees working of site.
  - Holiday
- Click in the **Start Date** field to use the calendar to select the date when the non-work hours should begin.
- Type the number of days that you wish to assign to the selected employee(s) in the **Number of Days** field.
- Type the number of hours that you wish to assign to the selected employee(s), each day for time period specified, in the **Hours Per Day** field.
- Click **Submit**, you will be directed to the Add Non-Work Hours Confirmation page.
- Review the information on the Add Non-Work Hours Confirmation page for accuracy.
  - Click **Submit** to save your changes.
  - Click **Cancel** to cancel the transaction.
  - Click **Back** to go back to the Add Non-Work page and revise the data.

## Editing a Punch

Modifying or editing a punch on an **Attendance** or **Timecard Report** is simple.

1. Click on the in or out time you want to edit. Each punch entry in the Time In and Time Out columns of the report is a link that will take you to the **Edit a Punch** window.
2. Follow the instructions in the [Adding a Punch](#) section to edit your punch data.

**Note:** All edited and manually entered punches will be flagged on the report with an 'E' next to the punch. Refer to [Chapter 2 under Punch Preferences](#) for instructions on disabling this option.

TIME IN	TIME OUT
Thu 08:00aE	Thu 04:30pE
E = Edited Punch	

## Viewing Additional Reporting Details

Customizing your reports and viewing additional details on a **Timecard** or **Attendance** report is uncomplicated.

The blue links in the **Timecard** and **Attendance** report are Web links that allow you to customize or view details of your data. The **Timecard** report has additional detail options. Refer to the next section for additional information.

- **Edit Employee Info:** Click the employee’s name in the Employee column of the report to edit an employee's details.
- **Select a Report Time Period:** To change the report timeframe, click the date link at the top of the Report screen.
  - Click the appropriate predefined timeframe link or use the **From** and **Thru** date fields enter a custom timeframe to run the report.
  - Click **Submit** after entering custom dates.

From: 09/16/16 Thru: 09/29/16										
<a href="#">Add Punch</a> <a href="#">Add Non-Work</a> <a href="#">Export</a> <a href="#">Summary</a> · <a href="#">Page Break</a> · <a href="#">Daily</a> · <a href="#">Notes</a> · <a href="#">Labor</a> · <a href="#">Exceptions</a> · <a href="#">Refresh</a>										
045-1 - E. Ingram										
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL
09/20/16	Tue 07:50aE	Work	Tue 04:30pE	30min		8.00				8.00
<b>Totals: (Format: Hundredths)</b>						8.00				8.00

- **Daily:** This option displays the total hours worked for each day in a report. This is convenient if the employee clocks in and out multiple times during the day.
 

You can also click the date in the Employee column of the report to view daily totals for a specific day. Click the date again to hide the information.
- **Labor:** this option will display the calculated labor cost (pay), if the wage option was completed in the Edit and Employee screen.
- **Exceptions:** Click this link to view punches that may require the attention of the payroll manager. Click the link again to hide this information.

Exception types and settings are found under Setting Your Alert Preferences in [Chapter 2 | Setting Your Time Clock Preferences](#). Descriptions of the exception flags are listed below.

<b>H</b>	Punch pair reached the Alert High Hours.
<b>L</b>	Punch pair is below the Alert Low Hours.
<b>M</b>	Punch pair reached the Alert Maximum Time.

- **Refresh:** Click this link to update the report. All recent punches or changes display.

## Using the Attendance Report

To view the **Attendance Report**, go to **Reports** and then click **Attendance Report**. The **Attendance Report** is designed to give you a quick at-a-glance view of your employee's daily attendance. Most companies use this report to view who has clocked In or Out for the day.

Click on the date link to choose the time period for the report. From the resulting page, you can perform edits.

## Using the Timecard Report

This report includes reporting options not available on the Attendance Report. The Timecard Report allows you to run a report for one specific employee, or all employees.

ATTENDANCE REPORT											
From: 09/16/16 Thru: 09/29/16				Add Punch		Add Non-Work		Daily · Notes · Labor · Exceptions · Refresh			
EMPLOYEE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL	
09/20/16											
045-1 - E. Ingram	Tue 07:50aE	Work	Tue 04:30pE	30min		8.00				8.00	
<b>Totals: (Format: Hundredths)</b>						8.00				8.00	

- To filter by employee, click the date link at the top of the report.
- Select the employee from the **Employee** drop-down menu.
- Click **Submit** to save your selection.

TIMECARD REPORT												
From: 09/16/16 Thru: 09/29/16				Add Punch		Add Non-Work		Export		Summary · Page Break · Daily · Notes · Labor · Exceptions · Refresh		
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	HOL	TOTAL		
09/20/16	Tue 07:50aE	Work	Tue 04:30pE	30min		8.00				8.00		
<b>Totals: (Format: Hundredths)</b>						8.00				8.00		
<b>Grand Total: (Format: Hundredths)</b>						8.00				8.00		

- **CSV Export:** Exports a report in comma-delimited (CSV) format. This report is used for importing employee punch data into programs that use CSV files.
  - Click **Export** at the top of the report to save the report in comma-delimited (CSV) format.
  - Click **Save** in the File Download screen, type a name for the file, and select a location to save the file. You can open the CSV file in a text editor or Microsoft Excel.
- **Summary:** Click **Summary** at the top of the Timecards Report to display a summary of total hours on the Timecard report, without the punch detail.
- **Page Break:** Click **Page Break** at the top of the Timecards Report to display an employee signature line. When you print timecards, this line displays on the timecard. This option is often used by companies that keep a printed record of employee time and to show employee timecard approval.

## Exporting to Paychex Flex

When creating a Paychex Flex export, a text file is created with the employee's time card data. At the end of the pay period, compile employee data and import it to Paychex Flex to process your Payroll.

Note: Contact your New Client Specialist to assist in setting up your Paychex Flex account to accept the time clock export file.

3. Select the timeframe of the data from the Pay Period dropdown menu.
4. Click **Submit**.

**Note:** You are notified if any employees do not have an assigned Paychex employee ID. The message and the option to view a list of these employees' displays at the bottom of the Payroll report screen.



The screenshot shows a web interface for creating a payroll export file. At the top right, the word "PAYROLL" is displayed. Below it, the "Payroll Provider" is set to "Paychex Flex". A "Pay Period" dropdown menu is currently set to "This Week". A prominent blue button labeled "CREATE A PAYROLL EXPORT FILE" is visible. Below this button, a message states: "Use the Payroll Export file to import employee timecards to your payroll system." An "Important" note follows: "Review employee timecards before submitting payroll." At the bottom, there is a "View Timecards" link and a yellow button.

## Chapter 5 | Maintaining Your Time Clock

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The Universal Time Clock application offers a simple way of backing up your data, removal of unneeded data and performing updates to keep your system running at an optimal level. This chapter shows you how to create backups of your time clock data, how to restore those backups for future reference, how to delete unneeded data and perform system updates.

### Creating a Data Backup

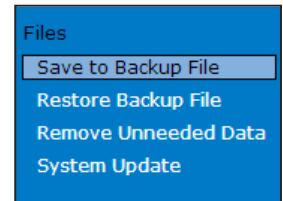
It is important to make a backup (copy) of your employee time clock data periodically. Use this backup to restore your data in case of any data loss. We recommend creating a backup of your time clock data each pay period and prior to performing any updates to your time clock.

### Data Backup from the Software Interface

It is important to make a backup (copy) of your employee time clock data periodically. Use this backup to restore your data in case of any data loss. We recommend creating a backup of your time clock data each pay period and prior to performing any updates to your time clock.


Follow the instructions below to create a backup of your time clock's data:

1. To create a backup file, select **Files | Save to Backup File**.
2. Click **Submit** to create a backup in the Save to Backup File screen.
3. Click **Save**.
4. A file name is automatically assigned for you. The file name includes the current date for easy reference. For example, a typical file name might be icon-2014-08-15.db.
  - If you prefer a different file name, enter the name in the File name field.
5. Browse to the directory where you would like to save the file.
6. Click **Save**.
7. After the download is complete, click **Close**.



### Data Backup to a USB Flash Drive

Creating a backup of your data can be simplified even further by simply saving your backup to a USB flash drive. A flash drive is a portable device that you can purchase at any computer store. Follow the directions below to create a backup of your time clock data using a USB flash drive.

1. Plug the USB flash drive into the bottom of the employee time clock terminal.
2. Enter into Supervisor Mode:
  - Press  on the time clock.
  - Enter your security code - the default security code is "00 00 00".

3. Press **Up** or **Down** until the **DOWNLOAD BACKUP** option displays.
4. Press **ENTER**.
5. The clock will display *Backing up data* and then *Backup complete*.

**Note:** The backup file saved on the USB flash drive is called backup.db. This file can be renamed and transferred to a folder on your main computer.

## Restore Time Clock Data Backup

On occasion you may need to restore historical data to your time clock. Follow the instructions below to restore a backup of your time clock data.


**Important:** Restoring a backup file will **OVERWRITE** the current data on the clock. Create a **CURRENT** backup of your data before attempting to restore and view "historical" data.

## Restore a Time Clock Data Backup from the Software Interface

1. To restore a backup file, select **Files | Restore Backup File**.
2. Type your password in the **Current Password** field.
3. Click **Browse** and navigate to the location of your backup file.
4. Select the file in the Choose File window and click **Open**.
5. Click **Submit** in the Restore Backup File screen to restore the backup file.
6. A warning message will display reminding you that your current data will be overwritten at the employee time clock. Click **OK** to continue. It may take several minutes to restore a backup file, especially if you are using a USB connection. The employee time clock will display a *Please Wait* and then a *Performing Restore* message.
7. After the restore is complete, you will be required to log back into the time clock to view the backup information.

## Restore a Time Clock Data Backup from a USB Flash Drive

Restoring a backup of your data is easy using your USB flash drive. Follow the directions below to restore a backup from a USB flash drive.

1. Copy the backup file data to the root of the memory stick.
2. Rename the file **backup.db** and ensure the name is all in lower case letters.
3. Connect the storage device to the bottom of the employee time clock.
4. Enter Supervisor Mode on the employee time clock.
  - Press  on the time clock.
  - Enter in your security code - the default security code is "00 00 00".



5. Press **Up** or **Down** until RESTORE BACKUP displays and press **ENTER**.
6. If the file is found, Restoring Data, then Performing Restore displays. The time clock reboots.
7. After the time clock reboots, log back into the employee time clock software to view your data.

## Removing Data from Your Application

It is recommended to keep less than 40,000 individual punches on your system at one time, for best performance. To keep your system running optimal, delete unneeded data off of the clock.

**Important:** Before removing any data from your time clock, we recommend you first make a backup of your existing data.

1. Go to **Files | Remove Unneeded Data**.
2. Select a date using the calendar in the Delete Punches Prior to field.
3. Click Submit to remove punches up to the date specified.

**Note:** When selecting a date, any data prior to that date will no longer be available as part of your active database.

4. Click **Cancel** to go back to the time clock Home page.

## Updating Your Time Clock

Occasionally, Icon Time Systems releases new updates for your employee time clock. These updates are provided for free and often include new features and improvements.

**Note:** Before performing updates to your employee time clock, we recommend that you save a backup of your data. Refer to the [creating a backup of your time clock data](#) section.

## Updating Your Time Clock from the Software Interface

**IMPORTANT:** If you are using a Macintosh computer to manage your time clock software, you must update using the USB flash drive. Go to [Updating Your Time Clock Using a USB Flash Drive](#) section in this chapter.

Follow the instructions below to update your Universal Employee Time Clock.

1. First download the time clock update file from our website to your desktop.  
[http://www.icontime.com/sb-100\\_pro\\_2.5\\_time\\_clock\\_update.asp](http://www.icontime.com/sb-100_pro_2.5_time_clock_update.asp)
2. From the **Navigation** menu, go to **Files** and select **System Update**.
3. In the System Update screen, type your time clock password in the **Current Password** field.
4. Click **Browse** to locate and select the **update.bin** file in the File Upload screen. This is located on your desktop.
5. Click **Open** in the File Upload screen.
6. Click **Submit** in the System Update screen.

7. A pop-up window displays for you to save a backup of your data. If you already created a backup of your data, disregard this message by clicking **OK**. Your time clock starts the update process, then automatically reboots. Wait for this process to complete. This process may take up to 15 minutes.
8. When rebooting is complete, click **Home** to log back into your time clock.

## Updating Your Time Clock Using a USB Flash Drive

Updating your time clock is even faster if you use a USB flash drive.


**Important:** If you are using a Macintosh computer to manage your time clock software, you must update using the USB flash drive.

1. First download the time clock update file from our website to your desktop.  
[http://www.icontime.com/sb-100\\_pro\\_2.5\\_time\\_clock\\_update.asp](http://www.icontime.com/sb-100_pro_2.5_time_clock_update.asp)
2. Connect the storage device to the bottom of the employee time clock. Your time clock begins the update process and automatically reboots. Wait for this process to complete.
3. When the reboot is complete, log back into your time clock.

## Resetting Your Time Clock Passwords

Perform the following procedures to reset the Software Interface and time clock Supervisor Mode passwords. Use this procedure if and there is a time clock administrator change or an existing administrator forgot their login and/or password for the time clock application.

## Resetting the Software Interface Password

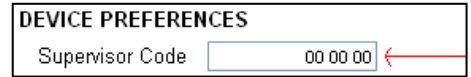
1. Enter into Supervisor Mode:
  - Press  on the time clock terminal.
  - Enter in your security code - the default security code is "00 00 00".
2. Scroll through the options using **Up** or **Down** until you find the option **Reset Password** and press **Enter**.
3. Press **In** to reset the password or **Out** to cancel.
4. Once the password is reset you will receive the message *Password Set Successfully* on the time clock display.
5. When logging in at the time clock **Login** page enter the default login information, and click **Submit**.
  - Default Username: admin
  - Default Password: admin
6. Change your password.
  - Type the default administrator password or your current password.
  - Type your new password.
  - Confirm your new password.

## Resetting the Supervisor Mode Security Code

The Supervisor Mode security code is set from the software interface. This code allows changes to be made at the time clock by the administrator. The default supervisor code is **00 00 00**.

It is recommended you change the default code to a new six-digit code using the procedure that follows:

1. Select **Settings | Preferences** from the Navigation menu.
2. Click the **Device** tab.
3. Type the supervisor code in the **Supervisor Code** field. This is required to access Supervisor Mode on the employee time clock terminal.
4. Click **Submit** to save your settings.



A screenshot of the 'DEVICE PREFERENCES' interface. It shows a label 'Supervisor Code' followed by a text input field containing '00 00 00'. A red arrow points to the right side of the input field.

## Changing Your Time Clock Software Interface Password

You can change the password by selecting **Change Password** from the Settings menu.


1. When prompted, enter the default login information and click **Submit**.
  - Default Username: admin
  - Default Password: admin
2. Type the default administrator password, or your current password in the **Current Password** field.
3. Type your new password in the **New Password** field.
4. Type your new password again in the **Confirm New Password** field.
5. Click **Submit**.



A screenshot of the 'CHANGE PASSWORD' interface. It features three text input fields labeled 'Current Password', 'New Password', and 'Confirm New Password'. Below the fields is a blue 'Submit' button.

## Changing the Time on the Time Clock Terminal

The instructions below outline changing the time on your time clock terminal.

1. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock terminal.
  - Enter your security code. The default security code is **00 00 00**.
2. Scroll through the options using **Up** or **Down** until you find the option **Set Date/Time** and press **Enter**.
3. The Set Date option displays.
  - The **Month** field flashes. Use **Up** or **Down** to select the current month, and press **Enter**.
  - In the **Day** field, use **Up** or **Down** to select the current day of the month and press **Enter**.
  - In the **Year** field, use **Up** or **Down** to select the current year and press **Enter**.
4. The Set Time option displays.
  - The **Hour** field flashes. Use **Up** or **Down** to select the current hour and press **Enter**.
  - In the **Minute** field, use **Up** or **Down** to select the current minutes and press **Enter**.

- In the **AM/PM** field, use **Up** or **Down** to select either **A** for a.m. or **P** for p.m. and press **Enter**.
5. Once the new time and date is set, Date/Time and Set Successfully displays on the time clock display. You are taken back to Supervisor Mode menu. Press **Clear** to exit Supervisor Mode.

## Chapter 6 | Accessories and Upgrades

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Your Universal Time Clock is designed to meet the needs of most small companies. Out of the box, your time clock comes with all that is needed to begin streamlining your payroll process immediately.

For those companies that desire greater functionality and extended automation, Icon Time Systems offers software upgrades that provides additional functionality such as; emailing alerts to supervisors, track benefit accruals, Web browser employee entry and more. We also offer proximity badges as an optional add on for your time clock, making employee sign in quicker and more secure.

### ***Software Upgrades Overview***

In this section, we will first give a brief overview of the features and functionality of each of these upgrades. Later in this chapter, you will find additional details and setup information for each of the upgrades.

Software upgrades can be applied at any time after you purchase your Universal Time Clock and can be purchased through your reseller. If you need help finding a reseller, give our Sales Department a call.

All software upgrade packs can be unlocked immediately by simply entering the software key provided by your reseller. For instructions on entering your software key, jump to the [Installing Software Upgrades](#) section of this chapter.

### **RTC-1000 Advanced Upgrade**

The RTC-1000 Advanced upgrade, upgrades the SB-100 PRO 2.5 to have all of the functionality of the RTC-1000 2.5 Universal Time Clock. This upgrade includes:

- 50 total employee capacity
- Department tracking and reports
- Supervisor logins, permission levels, and employee assignments
- Track Notes by the Punch, employee, or department.
- Create custom reports
- Customize employee ID (PIN) numbers
- Customized system Prompts
- Connect multiple time clocks using the Multi-clock feature
- Employee Web browser entry (for 5 employees)

After enabling the RTC-1000 Advanced Upgrade, refer to the RTC-1000 2.5 User Guide for instructions on using the RTC-1000 2.5 features.

### **Employee Capacity Upgrades**

The SB-100 PRO 2.5 comes standard with a 25 employee limit.

If at any point in time your company grows beyond your employee limit, you can easily upgrade your employee capacity to the next available level. Employee capacity is available in slots of 50, 100, or 250 employees per system.

After enabling additional employee licenses, refer to [Chapter 3 | Setting Up Your Employees](#) for instructions on setting up your employees.

## Benefit Tracking

The Benefit Tracking upgrade can help increase payroll efficiency and help reduce labor costs with the following features.

The Benefit Tracking upgrade includes:

- Revision Zones
  - Revision Zones provide sign IN and sign OUT windows for employees who work regular shifts. Rounds employee IN and OUT punches up to the assigned shift start and end time.
- Benefit Tracking and Accruals
  - Track and manage Vacation, Sick, and Personal Time benefits.
  - Automate maximum accrual amounts, yearly carryover, and borrowing of benefits.
- Enhanced Overtime Preferences
  - Customize overtime multipliers; allows you to pay half time, double time, or other custom rate on defined overtime.

## Email Alerts Upgrade

The Email Alerts allows the time clock to automatically email you employee alerts: as employees come and go, before they accumulate overtime, if they leave early, and more. It also includes the ability to email the Timecard Report to one or more recipients.

Also included; use of SSL technology to encrypt your data for increased security when transferring data over the Internet.

## Web Punch Time Clock


The Web Punch Time Clock allows you to capture your employees' punches anytime, anywhere using a browser based time clock that runs on LAN, WAN, Internet, or a stationary computer.

Web Punch Time Clock is offered in packages of 5 employee licenses and will allow a maximum of 25 employees to clock IN/OUT using the Web browser interface. The Web Punch Time Clock also offers advanced functionality like IP location restrictions and GPS tracking to help better manage your employee's punches.

## Installing Software Upgrades

In order to purchase a software upgrade, provide your reseller with your time clock serial number. You can find the serial number in the About Your Clock page under the Help menu.

Once you have purchased the software upgrade, your reseller will provide you with the 9 digit software upgrade code. Once you receive the 9 digit code, follow the instructions below to complete the software upgrade installation.

1. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock terminal.

- Enter in your security code - the default security code is "00 00 00".
2. Scroll through the options using **Up** or **Down** until you find the option *Enable Upgrade* and press **Enter**.
  3. Using the keypad, enter in the 9 digit software upgrade code provided to you and then press **Enter**.
  4. The time clock terminal will display the name of the upgrade. If there is a problem, contact our technical support team at 1-800-847-2232.

Once the upgrade has been installed, go the next section for instructions on setting up and customizing your new upgrade features.

## ***Benefit Tracking Upgrade- In Detail***

In this section we will discuss setting up benefit tracking, Revision Zones, enhanced overtime preferences, and adding non-worked hours.

### **Revision Zones**

Revision Zones are used to round punch hours to the start and end times of a specific shift. Employees will not get paid for punching IN early or OUT late.

With the standard upgrade, Revision Zones are set as a company-wide rule and allows for only one Revision Zone schedule.

### **Setting Your Revision Zones**

After installing the Benefit Tracking upgrade, you can access the Revision Zones by going to the Punch Preferences tab under Settings.

Follow the instructions below to customize your Revision Zones.

1. **In Revision Start Time** - Enter a time in hh:mm:a/p format - for example 7:30a.
2. **In Revision End Time** - Enter a time in hh:mm:a/p format - for example 8:00a.

**Example:** If an employee clocks IN between the In Revision Start and End Time, the shift start time will be rounded to the In Revision End time as shown in the example above. If an employee clocks IN between 7:30am and 8:00am, the "shift start" time will be rounded to 8:00am.

3. **Out Revision Start Time** - Enter a time in hh:mm:a/p format - for example 4:30p.
4. **Out Revision End Time** - Enter a time in hh:mm:a/p format - for example 5:00p.

If an employee clocks OUT between the Out Revision Start and End Time, the shift end time will be rounded to the Out Revision Start time, which is 4:30 pm.

**Note:** Making a change to the rounding options will prompt the time clock to restart. This doing so will make the time clock unavailable up to or exceeding 15 minutes.

## Enhanced Overtime Preferences

The additional Overtime options can be found under the Pay tab under Preferences in the Settings menu.

- Consecutive Day OT1 After** - this is used with the Consecutive Day OT Trigger setting.

**Example:** If the Consecutive Day OT is set 'Yes' and the Consecutive Day OT After is set to 7 days, employees will receive Overtime 1 on the seventh consecutive day of work. If the Consecutive Day OT1 After setting is set to 1 hour, the first hour worked on the seventh day is considered straight time and the rest of the hours will be Overtime 1 (OT1).

OVERTIME PREFERENCES	
Day OT1 After	8.00 Hours
Day OT2 After	99.00 Hours
Week OT1 After	40.00 Hours
Week OT2 After	99.00 Hours
Consecutive Day OT	No
Consecutive Day OT After	6 Days
Consecutive Day OT1 After	5.00 Hours
Consecutive Day OT2 After	99.00 Hours
OT1 Multiplier	1.50
OT2 Multiplier	1.50

- Consecutive Day OT2 After** - refer to the previous example. If this entry is set to 8 hours, employees will receive Overtime 2 on the seventh consecutive day of work for any hours over 8 hours in the day.
- OT1 Multiplier** - enter the pay rate for Overtime 1 (usually 1.5).
- OT2 Multiplier** - enter the pay rate for Overtime 2 (usually 2).

**Note:** Making a change to the overtime preferences will prompt the time clock to restart. This doing so will make the time clock unavailable up to or exceeding 15 minutes.

## Non-worked Hours and Benefit Time (Vacation, Sick, Personal)

The Benefit Tracking and Accruals feature included with the Benefit Tracking upgrade allows you to track and manage Vacation, Sick, and Personal Time benefits.

### Customizing Benefit Accrual Rules

Benefit Tracking and Accruals allow you to automate maximum accrual amounts, yearly carryover, and borrowing benefits. Benefit balances are available for each day of an employee's employment, letting you deliver real-time balances to managers and employees. Accrual rates and tracking are customized for each employee, which allows for the maximum in flexibility.

To customize an employee's Benefit Accrual Rules, go to the **Edit an Employee** screen by selecting the employee name from the **Employee List**.

ACCRUAL SETTINGS							
Accrual Start Date	01/01/11						
Accrual Reset Date	01/01/12						
Accruals							
ACCRUAL NAME	HOURS AVAILABLE	HOURS USED	LAST CALCULATED	YEARLY HOURS	YEARLY MAX	RESET AMOUNT	ALLOW NEGATIVE
Vacation	0.00	0.00	12/02/11	0.00	0.00	0.00	<input type="checkbox"/>
Sick	0.00	0.00	12/02/11	0.00	0.00	0.00	<input type="checkbox"/>
Personal	0.00	0.00	12/02/11	0.00	0.00	0.00	<input type="checkbox"/>

- Accrual Start Date** - click on the field and using the calendar select the date to begin tracking accruals for the employee.
- Accrual Reset Date** - click on the field and using the calendar select the ending date of the employees annual benefit period. The Accrual values will be reset on this date based on the information provided below. The Reset Date will advance forward by 12 months.



3. **Accrual Name** - lists the name of the specific benefit. The benefit names cannot be edited.
4. **Hours Available** - during initial set up, enter the hours the employee currently has available for the current year. Additional hours will be automatically posted each day according to the value set under **Yearly Hours**. As the employee uses the Accrued Benefit, the hours are automatically subtracted.
5. **Hours Used** - this field lists the total hours the employees has used for that benefit since the **Accrual Start Date**. This value is reset on the **Accrual Reset Date**.
6. **Last Calculation** - the date that the Benefit Accrual Totals were last updated.
7. **Yearly Hours** - enter the total benefit hours that the employee can accrue in one year.
8. **Yearly Max** - enter the maximum number of benefit hours allowed to accumulate for the benefit if you allow vacation hours to carry over from one year into the next, post the annual earned amount plus the amount allowed to carry over. If your company employs a "use it or lose it" policy, you should post the annual amount only.

**Note:** This field should not be set to zero unless your benefits do no accrue.

9. **Reset Amount** - set this value to the hours that an employee is to receive at the beginning of a new accrual period. Most companies would leave this field set to *zero*.
10. **Allow Negative** - check this box if your company allows employees to use Benefit hours before they are actually earned.

## Using Accrued Benefit Hours (Vacation, Sick, Personal)

Follow the instructions below to enter the Accrued Benefit Hours for the employee.

1. Select **Add Non-Work** from Timecard report.
2. Select the employee(s) from the **Select Employees** list.
3. Select the applicable punch type that you want to add from the **Type** drop-down menu.
4. The available punch types are:
  - Nonworked – used for employees working of site.
  - Holiday
5. Click in the **Start Date** field to use the calendar to select the date when the non-work hours should begin.
6. Type the number of days that you wish to assign to the selected employee(s) in the **Number of Days** field.
7. Type the number of hours that you wish to assign to the selected employee(s), each day for time period specified, in the **Hours Per Day** field.
8. Click **Submit**, you will be directed to the Add Non-Work Hours Confirmation page.
9. Review the information on the Add Non-Work Hours Confirmation page for accuracy.
  - Click **Submit** to save your changes.
  - Click **Cancel** to cancel the transaction.
  - Click **Back** to go back to the Add Non-Work page and revise the data.

- If the employee does not have enough accrued time to enter the benefit hours, an error page will appear, directing you to correct the time.

ACCRUAL SUMMARY		
ADAME,ALE		
Accrual Name	Hours Available	Hours Used
Vacation	20.00	12.00
Sick	8.00	8.00
Personal	8.00	0.00

## Accrual Summary Report

To generate the **Accrual Summary Report**, go to the **Reports** icon from the **Navigation** menu, select **Accrual Summary** from the drop-down menu.

This report lists the total Benefit Accrual Hours available and the hours used in real time, for each employee.

## Email Alerts Upgrade - In Detail

The Universal Time Clock application allows system alerts to be automatically e-mailed to one or more managers. In addition, from the Payroll screen, the Timecard Report can be emailed to your payroll processor. This includes a data encryption option to encrypt the data while transferring over the Internet.

**Important:** To send email alerts, you must have a SMTP server available. Contact your network administrator to find out if your company has a SMTP server. If your company does not have an SMTP server, there are many free email server services available. Settings for the most common free web based SMTP server accounts can be found on page 8 and 9 in this section.

**What is an SMTP Server?** An SMTP server works like a post assistant, handling the sending of emails from an email client to an email server. It receives outgoing mail messages from users and routes them to the mail recipients they are intended for.

## Outgoing Email Settings (SMTP Server)

- To assign your SMTP server settings, go to Device Preferences by clicking **Settings | Device**.
- Type your complete SMTP e-mail server address in the **Server Address** field. If you do not have this information, contact your network administrator or your service provider.

If used with the SSL encryption option, you may need to specify the mail server port by entering a colon and then the port number after the server address.

**Example:** smtp.gmail.com:587 connects to smtp.gmail.com and uses port 587. If a port number is not defined, default port number 25 is used.

**SMTP PREFERENCES**

Server Address

Use SSL for SMTP

Use STARTTLS

Use Authentication

Auth. Username

Auth. Password

Alert From Address

Email Domain Name

**Submit** **Cancel**

- Check the **Use SSL for SMTP** checkbox to use data encryption when sending e-mails. Using SSL may be a requirement for some SMTP server providers and may require that you define the SMTP port.
- Check the **Use STARTTLS** checkbox if you are using SSL and your SMTP service provider requires that you first connect to the server using an unsecure connection before connecting using SSL.
- Check the **Use Authentication** checkbox if your SMTP server requires a username and password to send e-mails.

6. Enter the **Auth Username** if you checked **Use Authentication**; enter your SMTP server username.
7. Enter the **Auth Password** if you checked **Use Authentication**; enter your SMTP server password.
8. Type the e-mail address you want to display in the **FROM** field in your e-mail in the **Alert From Address** field. The default setting is Your\_Time\_Clock.
9. Type your e-mail domain name in the **Email Domain Name** field. You can leave this set at the default setting, timeclockalerts.com.
10. Click **Submit** to save your settings.

For your convenience, configuration settings for the most common SMTP Server providers are located in the following section.

## Common SMTP Server Settings

Refer to the list below to find the most common SMTP Servers and their configuration settings. If your Internet Service Provider (ISP) is not on the list below, contact your ISP or Network Administrator for configuration instructions.

For the latest information on the ISPs listed, contact the ISP directly.

**Note:** We recommend using Google's free Gmail account for companies that don't have an available SMTP Server. In order to use this service, you must have a Gmail account. Refer to the configuration settings below to set this up

### Gmail

**Server Address:** smtp.gmail.com:587  
**Use SSL:** checked  
**Use STARTTLS:** checked  
**Use Authentication:** checked  
**Auth. Username:** Gmail account email address (user@gmail.com)  
**Auth. Password:** Gmail account password  
**Alert From Address:** Gmail account email address  
**Email Domain Name:** optional customization

### Comcast

**Server Address:** smtp.comcast.net:465  
**Use SSL:** checked  
**Use STARTTLS:** un-checked  
**Use Authentication:** checked  
**Auth. Username:** Comcast username  
**Auth. Password:** Comcast account password  
**Alert From Address:** Comcast account email address  
**Email Domain Name:** optional customization

### Verizon

**Server Address:** outgoing.verizon.net:587  
**Use SSL:** un-checked  
**Use STARTTLS:** un-checked  
**Use Authentication:** checked  
**Auth. Username:** Verizon username  
**Auth. Password:** Verizon account password  
**Alert From Address:** Verizon account email address  
**Email Domain Name:** optional customization

## Apple MobileMe

**Server Address:** smtp.mac.com:587  
**Use SSL:** user preference  
**Use STARTTLS:** if user selects to use SSL above  
**Use Authentication:** checked  
**Auth. Username:** MobileMe username  
**Auth. Password:** MobileMe account password  
**Alert From Address:** MobileMe account email address  
**Email Domain Name:** optional customization

## Emailing the Timecard Report

To email the Timecard Report, go to **Reports | Payroll**.

**Note:** Email functionality requires that the clock is connected via the Ethernet and that the SMTP Preferences be set.

1. Select the **Pay Period** that you wish to include in the Timecard Report.
2. Enter the recipients email address and a custom message to include in the email.
3. Press **Submit**.

**Note:** You are notified if any employees do not have an assigned Payroll ID. The message and the option to view a list of these employees' displays at the bottom of the Payroll Report screen



## Setting up Email Alerts

Before setting up automatic Email Alerts, you must customize your Alert settings. For instructions on how to do this, refer to [Chapter 2 | Setting Your Alert Preferences](#).

To customize your email settings, go to **Settings** from your **Navigation menu** and click on **Alerts Setup**.

With the Email Alerts upgrade enabled, you will have two additional columns under the **Alerts Setup** screen, as shown below.

ALERTS SETUP					
<input checked="" type="checkbox"/>	DESCRIPTION	LIFETIME	E-MAIL	REPEAT	RECIPIENT
<input type="checkbox"/>	High Hours	1 Day <input type="button" value="v"/>	Immediate <input type="button" value="v"/>	Never <input type="button" value="v"/>	mainoffice@yahoo.com
<input type="checkbox"/>	Low Hours	1 Day <input type="button" value="v"/>	Never <input type="button" value="v"/>	Never <input type="button" value="v"/>	day.manager@yahoo.com

4. Using the Alert Preferences set earlier, select **Settings | Alerts Setup**, and follow the instructions below to set up Home page and email alerts.
5. **Enabling/Disabling Alerts:** To disable an alert, deselect the checkbox in the far left column. This prevents the alert from being posted on the Home page or emailed.

**Tip:** We recommend disabling any unused alerts to minimize the resources used by your time clock and optimize system performance.

6. **Lifetime:** Use the drop-down menus under the **Lifetime** column to select the amount of time the alert remains on the Home page. After that time, the alert is automatically removed.
7. **E-mail:** Select how often you would like an e-mail alert sent from this drop-down menu.
8. **Repeat:** Select how often you would like an e-mail alert to be resent from this drop-down menu.
9. **Recipient:** Type the alert recipient's e-mail address. For multiple addresses, add a space or comma in between each e-mail address.

## Enabling SSL Server - Data Encryption

SSL data encryption ensures that all data passed between the time clock and web browser remains private. Enabling SSL is simple.

1. Select Device Preferences | Settings, then the Device tab.
2. Check the Use SSL Server checkbox.

**Note:** Do **not** use SSL data encryption with USB connection. Enabling SSL data encryption while using USB, disables access to the time clock.

## Web Punch Time Clock - In Detail

The Web Punch Time Clock allows you to capture your employees' punches anytime, anywhere using a browser based time clock that runs on LAN, WAN, Internet, or a stationary computer. Web Punch Time Clock is offered in packages of 5 licenses and will allow a maximum of 25 employees to clock IN using the Web browser interface. The Web Punch Time Clock also offers advanced functionality like IP location restrictions and GPS tracking to help better manage your employees' punches.

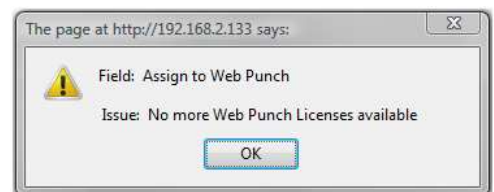
**Note:** If you are using USB communications, Web Punch will not be available to employees through your local area network or the Internet.

## Setting Up Your Employees - Web Punch Time Clock

To assign the employees to use the Web Punch Time Clock, open the **Roster Report** and select the employee. This brings up the **Edit an Employee** screen.

Follow the instructions below to assign the employee to the Web Punch Time Clock.

1. Select **Lists | Employee List**.
2. Select an employee. The Edit an Employee screen displays.
3. Check the **Assign to Web Punch** checkbox to enable Web Punch for this employee.
4. Type a password for the employee to use when punching in/out on the Web Punch Time Clock in the **Web Punch Password** field.
5. Type the IP address that this employee may punch from in the **Authorized IP Address(es)** field. Leave this field blank to allow the employee to punch from any IP address.



6. Check the **Allow Punch from Unauthorized IP** checkbox to allow the employee to punch from an unauthorized IP address.
7. Check the **Use Global Authorized IP Address** checkbox to allow an authorized IP address for all employees.
8. Click **Submit** to save your settings. Repeat the steps above for each employee you wish to assign to the Web Punch Time Clock.

If you exceed your Web punch license limit, you will receive an error message stating that you do not have enough Web Punch Licenses available.

Web Punch Time Clock is offered in packages of 5 licenses and will allow a maximum of 25 employee Web Punch licenses. Contact Icon Time Systems Sales department to order more Web Punch Time Clock licenses.

## Punching IN/OUT Using Web Punch Time Clock

Employees assigned to the Web Punch Time Clock can now punch in/out anytime, anywhere, using a web browser based time clock.

Follow the instructions below to punch in or out using the Web Punch Time Clock.

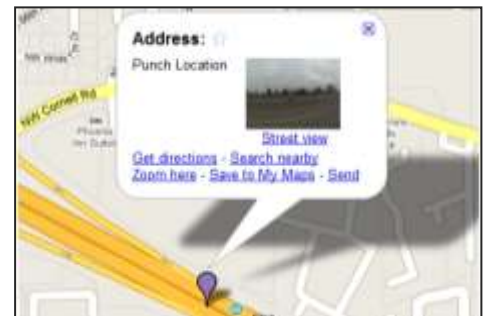
**Note:** If you are using USB communications, Web Punch will not be available to employees through your local area network or the Internet.

1. Open the employee time clock **Login** page.
2. Type the assigned PIN/badge number in the **Username/PIN** field.
3. Type the employee's assigned Web Punch password in the **Password** field.
4. Click **Submit**. The employee Web Punch screen displays.
5. Select the appropriate option (**Punch In**, **Punch Out**, or **Department Change**) to complete your punch.
6. If the employee has the ability to change departments, select the department.
7. Click **Confirm**.
8. After punching in or out, the Web Punch screen lists the employee punch information.
  - **Week Hrs:** Lists the total hours the employee worked for the week.
  - **Day Hrs:** Lists the total hours the employee worked for the day.
  - **Punch Hrs:** Lists the total hours the employee worked for that punch pair.

## Running Reports with the Web Punch Time Clock

To make it simple to identify punches from a web browser, punches are flagged with a **W** after the punch time. If a punch comes from an unauthorized IP address, it is flagged with an **X**.

By clicking on the punch, additional information about that punch displays.



- **Web Punch IP Address:** Lists the IP address of the computer/device the employee punched in/out from.
- **Web Punch Browser:** Lists the web browser the employee used while punching in/out.

## Clocking IN/OUT from GPS Enabled Smartphone – Location Tracking

If an employee clocks IN/OUT using an iPhone, additional punch information is available stating the employee’s exact location at the time of the punch.

**Note:** A punch that includes GPS location information is flagged with a ‘G’ on the reports. By clicking on that punch you can view additional information provided by the phone’s GPS.

- GPS Location
  - **Latitude/Longitude:** the location of the employee when they created the punch.
  - **Accuracy:** the accuracy of the coordinates given by the GPS.

**Example:** The accuracy of this punch is up to 372 feet. In other words, the employee was within a 372ft radius of the coordinates given.

- **Speed** – states how fast the employee was traveling when they created the punch.

By Using Google Map integration and clicking on the GPS Location link, you can see where the employee was on a map when they created the punch.

## IP Address Restriction

Using IP Address Restriction, you can restrict an employee to web punch in/out from only authorized locations via the IP address of their computer or web-enabled device. If an employee attempts to web punch in/out from an unauthorized location (IP address), you may set the system to lock them out or allow it, but flag the punch as coming from an unauthorized location. This information displays on a report.

IP address restrictions are enforced by setting authorized IP addresses globally (company-wide) and/or by employee.

## Setting Authorized IP Addresses Globally

Global Authorized IP Address(es) assigns the IP address that all employees are authorized to use. To set this, follow the instructions below.

1. Select Settings | Preferences and click the Device tab.
2. In the Global Authorized IP Address(es) field, enter the IP address(es) of the computer (or other web-enabled device) the employees are authorized to punch in/out.

The authorized IP address can be listed in the following ways.

- **Any IP Address:** Leave the field blank to allow employees to punch in/out from any IP address.
- **Multiple IP Addresses:** Put a comma between the authorized IP addresses to allow the employee to punch from any IP address listed.

**Example:** 192.168.3.6, 192.168.3.784

- **Range of IP Addresses:** The employee can punch at computers with an IP address that falls within the 30-45 range.

**Example:** 192.168.3.30-45

3. Click **Submit** to save your changes.

**Note:** If an employee is not authorized to punch in/out from the Global Authorized IP Address, uncheck the **Use Global Authorized IP Address** option in the employee's Edit an Employee screen.

## Setting Authorized IP Addresses by Employee

The employee's **Authorized IP Address(es)** field assigns the IP address that a particular employee is authorized to punch in/out. To set the authorized IP address(es), perform the following instructions.

1. Go to the **Employee** page and select the employee from this list.
2. In the **Authorized IP Address(es)** field, enter the IP Address(es) of the computer (or other web-enabled device) that the employee is authorized to punch in/out.
3. You can list the authorized IP address(es) in the following ways.
  - **Any IP Address:** Leave the field blank to allow employees to punch in/out from any IP address.
  - **Multiple IP Addresses:** Put a comma between the authorized IP addresses to allow the employee to punch from any IP address listed.  
  
**Example:** 192.168.3.6, 192.168.3.784
  - **Range of IP Addresses:** The employee can punch at computers with an IP address that falls within the 30-45 range.  
  
**Example:** 192.168.3.30-45
4. Check the **Allow Punches from Unauthorized IP** checkbox to allow employees to punch in/out from an unauthorized IP address. Punches from unauthorized IP addresses are flagged with an **X** on the reports.
5. Click **Submit** to save your changes.

## Using Proximity Badges


To add Proximity Badge Entry to your Universal Time Clock, simply purchase the badges as a separate add-on to your clock. Proximity badges use the latest in RFID proximity technology and allow employees to clock In/Out by simply waving the badge in front of the time clock keypad. There are many benefits to using proximity badges including; minimizing buddy punching, quicker clock IN, no PIN to memorize, keeps dirty hands off the clock, and more.

Proximity Badges can be purchased in boxes of 10 or 25 badges. These badges also conveniently fit into your employee's wallet or can be hung on a lanyard. Badges can be easily reassigned to a new employee if needed.

## Assigning Proximity Badges to an Employee



Proximity Badges are assigned at the employee time clock terminal. Follow the instructions below to assign your proximity badge to an employee.

1. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter in your security code - the default security code is "00 00 00".
2. Scroll through the options using **Up** or **Down** until you find the option **Assign Badges** and press **Enter**.
3. The time clock display will prompt *Enter ID Number*. Use the keypad to enter the ID number (PIN) of the employee you wish to assign the badge and press **Enter**.
4. Wave the badge in front of the time clock keypad (the 6 key is the optimal location to wave the badge). The clock will display *Assigned* when the badge has been assigned to the employee.

The employee can now use the badge to punch In and Out. Repeat the steps above for each employee.

**Note:** To reassign a currently used badge, select the new employee in the **Assign Badges** menu and wave the badge. A *Badge Already Assigned* message will appear. Press **Enter** to reassign the badge.

## Locking the Time Clock Terminal Keypad

This feature prevents employees from punching in for a coworker, otherwise known as "buddy punching". This is recommended for those using the Proximity badges for employee punching. To lock the time clock terminal keypad, follow the steps below.

1. Select **Navigation | Settings**, then click the **Device** tab.
2. Under **Device Preferences**, check the **Lock Keypad** checkbox. By checking this box, employees are no longer able to punch in or out using their PIN number.

## Punching IN/OUT Using Proximity Badges

Wave the badge next to the keypad of the time clock terminal to punch IN or OUT. Follow the punch procedure established in [Chapter 1](#) under [Employee Functions at the Clock](#).

# Chapter 7 | Configure the Time Clock for Remote Access

For your convenience, troubleshooting tips and answers to the most frequently asked questions are provided in this section.

Icon Time Systems' Universal Time Clocks (RTC-1000 and SB-100 PRO) are unique because they can be accessed remotely over the Internet. Setting up your time clock for remote/Internet access can be done in one of two ways.

- Setup Using Port-forwarding, through your Internet Router
- Setup Using a Static Public IP Address Provided by your Internet Service Provider (ISP)

## Set Up Port-forwarding, through your Router

Requirements:

- A Broadband Internet connection (Cable, DSL, T1, etc.) at the location of the clock
- Universal Time Clock connected to your network by an Ethernet (i.e. CAT5) cable
- A "Port-Forwarding" router (most newer routers can do this)

**Important:** If you are not familiar with port forwarding or your Network IP address configurations, have your network administrator assist with the steps below.

## Step 1: Set Up the Universal Time Clock on the Local Network

Follow the instructions on the Universal Time Clock Quick Start Guide to set up your system on the Local Network. Once you are able to access the Universal Time Clock software Home Page from a PC inside your internal network, you are ready to configure the system for remote access.

## Step 2: Router Configuration

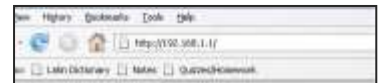
You will now configure your router for port-forwarding. Port forwarding allows remote computers, for example, computers on the Internet, to connect to a specific computer or service within a private local area network (LAN).


**Important:** The instructions in the Router Configuration section are general guidelines for configuring a router for port-forwarding. Actual steps required may vary with each router. For specific instructions on your particular router, please contact the router's manufacturer.

1. The first step is to go to your router's "web page", you'll need your PC connected with a cable, this is called a LAN (Local Area Network) connection.
2. Open up your web browser, and enter the IP address for your router.
  - This is normally: 192.168.1.1 or 192.168.0.1

If you do not know the IP address of your router check your computer's Default Gateway

- **Windows XP:** start > run> cmd > ipconfig /all



 Enter 192.168.1.1 into the address bar

- **Vista, Win 7 and Win 8:** Search for “cmd” in the **Windows Start** menu to bring up the command prompt and type “ipconfig /all”.

Application	Start	End	Protocol	IP Address	Enable
Web	80	80	TCP	192.168.1.100	<input type="checkbox"/>
Mail	110	110	TCP	192.168.1.100	<input type="checkbox"/>
FTP	21	21	TCP	192.168.1.100	<input type="checkbox"/>
SSH	22	22	TCP	192.168.1.100	<input type="checkbox"/>

This page should look like this.

3. The router will ask for a username and password. Below are some default router logins
  - Linksys Router - "admin" for both username and password
  - Netgear Router - "admin" for username and "password" for password
  - D-Link Router – "admin" for username and (leave blank) for the password
  - 3Com Router – "admin" for both username and password
  - Microsoft Broadband – "admin" for both username and password
4. Look for a tab with a name like, "Port Forwarding" or "Applications and Gaming"
5. Next, enter port 80 as the desired port. If port 80 is unavailable you may enter port 9844 as an alternative.
  - If your router asks you whether to open ports for TCP or UDP select TCP or both.
  - Some routers offer a from port \_\_\_ to port \_\_\_, if you only want one port open enter the same number into both blanks.
6. Next, enter the IP address that you used to access the time clock from the web browser.
7. Make sure you click on the **Save Settings** button, or your changes will not take effect.

### Step 3: Connect to Your Universal Time Clock over the Internet

After configuring your router to forward your time clock’s IP address to port 80 or port 9844, connect to the clock through the Internet by logging onto the external/public IP address (provided by your ISP).

1. Look up your external/public IP address in one of the following ways;
  - On a computer on the same network as your clock go to [www.whatismyip.com](http://www.whatismyip.com). Your external /public IP address will be displayed on the page.
  - Log into your router and look at your router's settings for the WAN (Wide Area Network) address.
2. Log onto the time clock using the external/public IP address. If you are forwarding to port 9844, log onto the time clock using your external/public IP address followed by “:9844” and preceded by “http://” .

**Example:**        http://68.213.945.154:9844

### Setup Using a Static Public IP Address Provided by your ISP

The steps required to set up a device on your network using a public static IP will be specific to your Internet Service Provider (ISP). Contact your ISP for specific network configuration or contact an IT professional for assistance.


Requirements:

- A Broadband Internet connection (Cable, DSL, T1, etc.) at the location of the clock
- Universal Time Clock connected to your network by an Ethernet (i.e. CAT5) cable
- An available Public Static Public IP address provided by your Internet Service Provider (ISP) to be assigned to the clock

- Router that supports multiple IP addresses or a network switch

After configuring your network using the instructions provided by your ISP, follow the instructions below to program the static IP address into the time clock.

## Assign the Static Public IP Address to the Time Clock

1. First determine an available Static Public IP address from the ones provided by your ISP to be assigned to the time clock.
2. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter in your security code - the default security code is "00 00 00".
3. Scroll through the options using **Up** or **Down** until you find the option View IP Address - press **Enter**.
4. The current IP address of the clock will appear. Press **Enter** again.
5. Enter the desired IP Address including leading zero's.  
**Example:**           68.213.004.068
6. A message should appear on the clock *IP Address Set Successfully*. Press **Clear** to exit Supervisor Mode.
7. Unplug the power to the clock for a few seconds and plug it back in. Allow the clock to reboot.
8. Open a Web browser on your computer and in the address bar type in the IP address of the clock to log into the time clock.

## Troubleshooting Connection Problems

If you are unable to connect to your time clock using the external/public IP address you will need to troubleshoot your connection and configuration.

- Make sure that the correct IP address and/or port number has been input in the port forwarding settings in your router.
- Make sure that the correct external/public IP address has been input in at the web browser.
- Make sure that there is not another device on the network that is using a duplicate IP address as the time clock.
- Check the filter settings on the router to be sure that it is not interfering with the connection.

For additional troubleshooting steps refer to <http://www.portforward.com>. Select your router by model name and number for specific port forwarding instructions.

**Important:** There are many different types, brands, and models of routers and networks. Every business network is different, for this **reason Icon Time Systems is unable to and not responsible for configuring your router for remote set up.**

We recommend that you contact an IT professional or consultants if you are in need of additional troubleshooting help.

## Chapter 8 | Troubleshooting & Frequently Asked Questions

For your convenience, troubleshooting tips and answers to the most frequently asked questions are provided in this section. In addition, our technical support site lists more troubleshooting tips and how-to's to assist you with the Universal Time Clock. You can reach this site at [www.support.icontime.com](http://www.support.icontime.com).

Upon product registration, you receive a complimentary 30-day trial of our Gold Technical Support Plan, which includes unlimited telephone support, troubleshooting, and remote assistance. For those subscribers of our technical support plans, your dedicated support team can be reached Monday through Friday from 7:30am to 4:30pm (Pacific coast time) at (800) 847-2232 option 1.


Register Your Time Clock - [www.icontime.com/universal\\_time\\_clock\\_registration.asp](http://www.icontime.com/universal_time_clock_registration.asp)

### Frequently Asked Questions

- Q.** I added a new punch for an employee but I do not see it on my report. What could be wrong?
- A.** The report screen will default to the original time frame after the punch is added. The punch was probably added into a different time frame. Click on the date link to select and view the proper time frame. If you were viewing ALL employees in the **Timecard** report, you will be brought back to a **Timecard** report for that specific employee. From the date link, you will need to select ALL employees to view the original report.
- Q.** I have added a wage amount for my employee(s) but labor is displaying \$0.00 on my reports. What could be wrong?
- A.** The labor rate will not automatically update if the punches are already on your reports. To update labor totals, click on each **IN** punch on the report screen and simply click the SUBMIT button in the **Edit a Punch** screen.
- Q.** The program seems to be slow when I edit punches. What can I do to improve system performance?
- A.** If the punch editing process slows down over time, there are various things that you can do to assure optimal performance.
1. We highly recommend only keeping the most recent data on your time clock. In order to keep your system running optimal, delete unneeded data off of the clock. Refer to Removing Data from Your Application for instructions.
  2. Using popup windows and batch edits is another way to make editing punches much faster. Instructions on configuring popup windows and batch edits can be found in Chapter 2 under [Setting Your Device Preferences](#).
  3. Instead of using the **Timecard Report** for editing punches, we recommend that you use the **Attendance Report**. Running this report takes less time clock resources and less time to generate.
  4. Minimize how often your time clock checks for Alerts. Instructions for changing these settings can be found under [Setting Your Alert Preferences](#) as discussed in Chapter 2.
  5. Disable any alerts that you are not using from the **Alerts Setup** screen. Use your mouse cursor and click **Settings** and then **Alert Setup**.
- Enabling/Disabling Alerts** - to disable an alert, deselect the checkbox in the far left column. This will prevent the alert from being posted to the **Home** page.
- Q.** How do I determine the software version of my employee time clock?
- A.** Your current time clock software version can be found under **the Help, About Your Clock**. Compare your Software Version with the software version posted on our website.
- SB-100 PRO 2.5 Universal Time Clock - [www.icontime.com/sb-100\\_pro\\_2.5\\_time\\_clock\\_update.asp](http://www.icontime.com/sb-100_pro_2.5_time_clock_update.asp)

**Q.** Why can't I access my time clock? How do I set a static IP Address?

**A.** If the clock was assigned a dynamic IP Address, this address may have changed if the router reboots or your time clock is unplugged from the power. To assign a Static IP Address, follow the instructions below.

1. First determine an available IP Address for the employee time clock. Your network supervisor can provide you with this information or help with these steps.
2. Enter into Supervisor Mode at your employee time clock terminal.
  - Press  on the time clock.
  - Enter in your security code - the default security code is "00 00 00".
3. Scroll through the options using **Up** or **Down** until you find the option *View IP Address* - press **Enter**.
4. The current IP Address of the clock will appear. Press **Enter** again.
5. Enter the desired IP Address including leading zeros.

Example: 192.168.002.528

**Note:** If the clock is on the same local subnet as your computer, you should not have to change the settings for subnet mask, gateway, or DNS server. Your network supervisor will know how to set this up if needed.

6. A message should appear on the clock *IP Address set successfully*. Press **Clear** to exit Supervisor Mode.
7. Unplug the power to the clock for a few seconds and plug it back in. Allow the clock to reboot.
8. Open a Web browser on your computer and in the address bar type in the IP address of the clock to log into the time clock.

# Warranty Information

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ICON TIME SYSTEMS, INC., An Oregon Corporation

**Notice:** The information contained in this document is subject to change without notice.

ICON TIME SYSTEMS MAKES NO WARRANTY OF ANY KIND WITH REGARD TO THIS MATERIAL, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE. ICON TIME SYSTEMS shall not be liable for errors contained herein, or for incidental consequential damages in connection with the furnishing, performance, or use of this material.

## ONE-YEAR LIMITED WARRANTY

ICON TIME SYSTEMS, INC. offers the original purchaser a warranty for **One (1) Year on Parts and Labor**.

ICON TIME SYSTEMS will repair and exchange parts for your unit free of charge in the USA in the event of a defect in materials or workmanship, as follows:

### PARTS

New or comparable rebuilt parts in exchange for defective parts for one (1) year beginning on the date of delivery.

### LABOR

Mail-in service for One (1) year beginning on the date of delivery.

### SERVICE

If adjustments or repair are required, purchaser must contact our customer service department within the warranty period detailing the request. The purchaser must provide model, serial number, and a copy of original purchase. If ICON TIME SYSTEMS decides a product requires service, ICON TIME SYSTEMS will issue a Return Material Authorization Number (RMA). Products may be shipped to ICON TIME SYSTEMS adequately insured, in their original packaging or equivalent, with shipping charges prepaid. Risk of loss or damage during shipping to ICON TIME SYSTEMS is the sender's responsibility. Once we receive the equipment, it will be inspected, repaired as needed, tested, and returned via standard ground shipping to the purchaser. Return shipping costs of the repaired or replaced unit will be paid by ICON TIME SYSTEMS.

This warranty is extended only to the original purchaser. A purchase receipt or other proof of date of original purchase will be required before warranty work is rendered.

This warranty only covers failures due to defects in materials or workmanship that occur during normal use. It does not cover failures due to damage which occurs in shipment, or failures which are caused by products not supplied by ICON TIME SYSTEMS, or failures which result from accident, misuse, abuse, neglect, mishandling, misapplication, alteration, faulty installation, modification or service by anyone other than a factory service center, or damage that is attributable to acts of God.

No warranty is given for damages caused by external wiring indicating improper connection to power supply or line wiring, or for damages caused by spikes, power surges, brown outs, lightning, static electricity, or radio waves. Surge protectors are readily available to enhance and protect equipment performance following initial installation.

ICON TIME SYSTEMS SHALL NOT BE LIABLE FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES RESULTING FROM THE USE OF THIS PRODUCT, OR ARISING OUT OF ANY BREACH OF THIS WARRANTY. DURATION OF IMPLIED WARRANTIES, IF ANY, IS LIMITED TO ONE (1) YEAR. Some states do not allow the exclusion of limitation of incidental or consequential damages, or limitations on how long an implied warranty lasts, so the above exclusions or limitations may not apply to you.

This warranty gives you specific legal rights and you may also have other rights that vary from state to state.

If a problem with your ICON TIME SYSTEMS unit develops during the warranty period, contact ICON TIME SYSTEMS SERVICE DIVISION, 15201 NW Greenbrier Parkway, Suite A1, Beaverton, Oregon 97006

There are no other express warranties except as listed above.

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## FCC Part 15

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This equipment has been tested and found to comply with the requirements for a Class B digital device under Part 15 of the Federal Communications Commission (FCC) rules.

These requirements are intended to provide reasonable protection against harmful interference in a residential installation. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation.

If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced technician for help.

Changes or modifications to this equipment not expressly approved by the party responsible for compliance could void the user's authority to operate the equipment.

To ensure safety of users, the FCC has established criteria for the amount of radio frequency energy that can be safely absorbed by a user or bystander according to the intended usage of the product. This product has been tested for compliance with the FCC criteria.