

Scheduling and Lockout for TimeSource Time and Attendance

SCHEDULE
X

Find Schedule
Copy From Schedule
COPY DAY
TOGGLE VIEW
GLOBAL ASSIGN

SCHEDULE
☰
🗑️
📄
☑️
👤

	☒ MON	☒ TUE	☒ WED	☒ THU	☒ FRI	☐ SAT	☐ SUN
1 - 08:30a - 5:00p							
Shift Start	8:30a	8:30a	8:30a	8:30a	8:30a		
Meal Start							
Meal Return							
Shift End	5:00p	5:00p	5:00p	5:00p	5:00p		

Lockout Before:
 Early Before:
 ----- **Shift Start** -----
 Late After:
 Lockout After:

Lockout Before:
 Early Before:
 ----- **Meal Start** -----
 Late After:
 Lockout After:

Lockout Before:
 Early Before:
 ----- **Meal End** -----
 Late After:
 Lockout After:

Lockout Before:
 Early Before:
 ----- **Shift End** -----
 Late After:
 Lockout After:

Leave a field blank to disable the use of that feature in this schedule.

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Chapter 1 - Overview of Scheduling for TimeSource ®

Now you may add **Scheduling** and **Lockout** functions to Icon Time Systems popular **TimeSource for Windows**. Compatible with version 7.00 TimeSource Full or Lite, Scheduling is written in Microsoft's **Access** and provides these outstanding features & benefits:

Set up your own custom scheduling formats

Design one format & copy it to another without having to re-enter the same data over and over. Then change the shift Start / Stop times to reflect your new schedule and you're ready to go! Create all the schedules you need using this simple method.

Create special schedules to accommodate employees who different hours on a daily basis.

Easily assign and reassign employees to different schedules, whenever you need to. Select individuals or globally assign large groups in one command.

Schedule Violation Reports – including:

Early arrivals	See who arrives before their scheduled shift start time
Late arrivals	Track tardiness, reward those who are punctual
Early departure	See which employees left before their shift ended
Late departure.	See who worked past their scheduled shift ending time
Absenteeism	Easily track how many times an employee misses work
Meal breaks	Track long and short lunches

Lockout control enforces your work rules at the clock.

No more unauthorized overtime due to employees signing IN early or OUT late.

Employees who attempt to sign IN or OUT during restricted times will not be able to use the clock. If they are already signed IN they may transfer departments, enter job numbers and piece-counts.

Supervisor over-ride allows employees to clock IN or OUT during lockout periods. Lockout override punches may be excused or unexcused by the supervisor.

Lockout may be toggled off for large numbers of employees and then toggled back on for regular scheduling use.

Chapter 2 - Installing TimeSource Scheduling & Lock-out module

Installation Requirements

TimeSource Installed

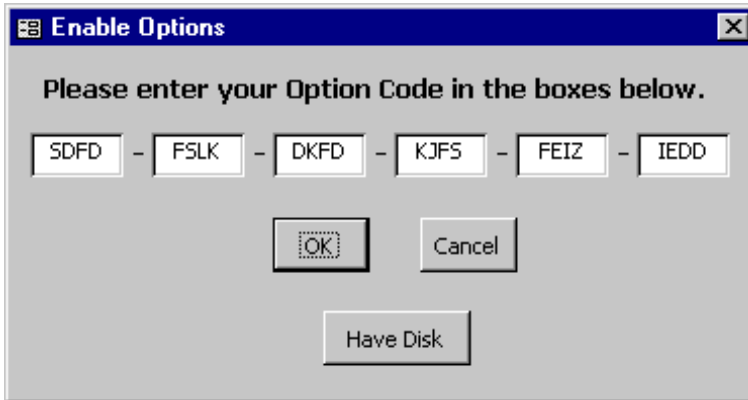
Display resolution set to 800 X 600 or greater

TimeCalculator Data Terminal Version 7 or higher

Activating Scheduling in TimeSource

When you purchase scheduling you should be provided with an Enable Option Code. To activate your scheduling module please enter this code under the **TimeSource** program's **File** menu by choosing the **Install Module** selection.

A typical Option Code might look like the one below.



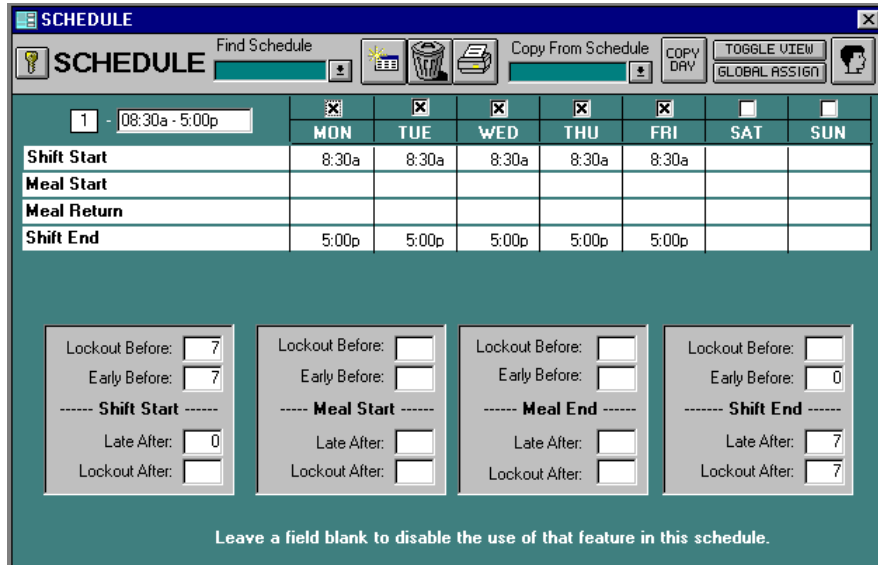
That's all there is to it, you are now ready to create schedules and assign employees to them. Remove the Scheduling program disk and store it in a safe place. Remember that the Scheduling module like all TimeSource options is serial number sensitive; therefore you should store it with the original TimeSource program disks having the same number.

Special Note regarding Video Display Settings: In order for the Scheduling module to display properly you must set your PC's video display settings to a minimum 800 x 600. This is easily accomplished via the control panel. Click on the Display icon and then select Settings. Use the mouse to move the Screen Area pointer to indicate 800 x 600 pixels. Then select Apply, and if prompted to restart the PC, select yes. This procedure varies slightly from one PC to another, depending on whether you are using Windows 95 or 98.

Schedule screens

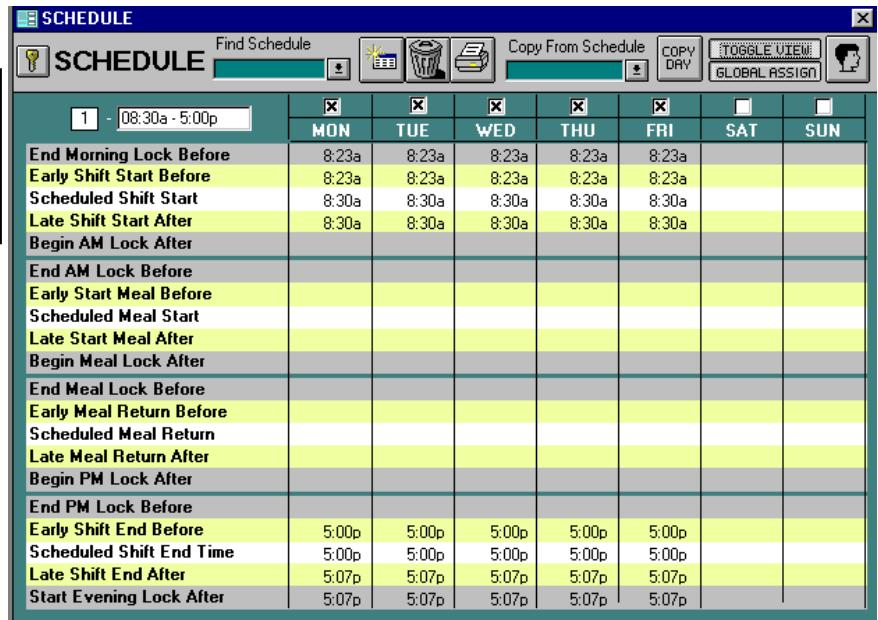
The TimeSource Scheduling module provides two ways to view the schedules you establish. The normal or “default” view is where you will create and edit schedules. The underlying view illustrates the actual times that your schedule rules will affect punches. You can toggle from one view to the other by clicking the “Toggle View” button. When you leave Scheduling the screen automatically returns to the default view.

Default View
This is where you create and edit schedules.



	MON	TUE	WED	THU	FRI	SAT	SUN
Shift Start	8:30a	8:30a	8:30a	8:30a	8:30a		
Meal Start							
Meal Return							
Shift End	5:00p	5:00p	5:00p	5:00p	5:00p		

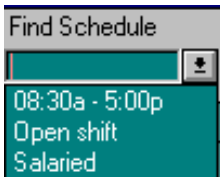
Underlying view:
This screen illustrates the actual times your



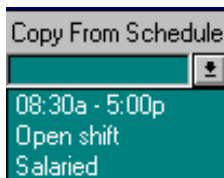
	MON	TUE	WED	THU	FRI	SAT	SUN
End Morning Lock Before	8:23a	8:23a	8:23a	8:23a	8:23a		
Early Shift Start Before	8:23a	8:23a	8:23a	8:23a	8:23a		
Scheduled Shift Start	8:30a	8:30a	8:30a	8:30a	8:30a		
Late Shift Start After	8:30a	8:30a	8:30a	8:30a	8:30a		
Begin AM Lock After							
End AM Lock Before							
Early Start Meal Before							
Scheduled Meal Start							
Late Start Meal After							
Begin Meal Lock After							
End Meal Lock Before							
Early Meal Return Before							
Scheduled Meal Return							
Late Meal Return After							
Begin PM Lock After							
End PM Lock Before							
Early Shift End Before	5:00p	5:00p	5:00p	5:00p	5:00p		
Scheduled Shift End Time	5:00p	5:00p	5:00p	5:00p	5:00p		
Late Shift End After	5:07p	5:07p	5:07p	5:07p	5:07p		
Start Evening Lock After	5:07p	5:07p	5:07p	5:07p	5:07p		

Scheduling tool bar & buttons

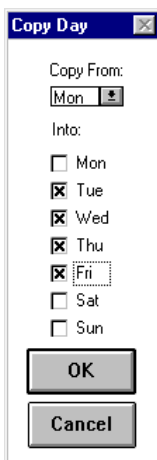
The Scheduling module shares many of the same toolbar buttons found elsewhere in TimeSource. Additional buttons are unique to scheduling. Before proceeding please take a few moments to familiarize yourself with them.



The **Find Schedule** feature is used to locate existing schedules. Schedules are listed by names in alphabetical order. To open the list simply click on the arrow button. Select the desired schedule by clicking on the name. You may also type in the name of a schedule and press the enter key. Notice that if you use this method the first letter of the name will bring up the schedule.



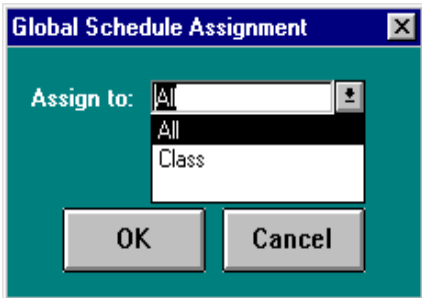
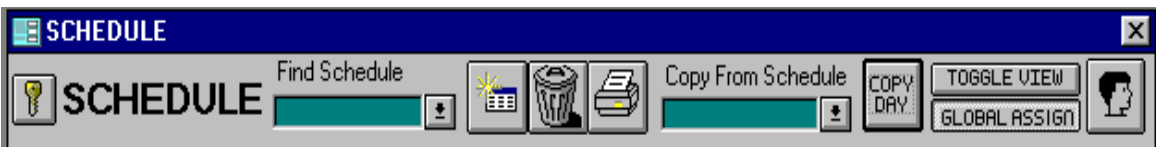
The **Copy From Schedule** feature makes it simple to create new schedules by copying an existing one, then editing it to your new specifications. This feature saves time, as you do not have to re-enter the same data over and over. The scheduling module comes with a sample schedule that can be used to create your first schedule.



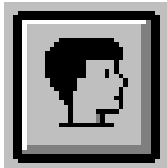
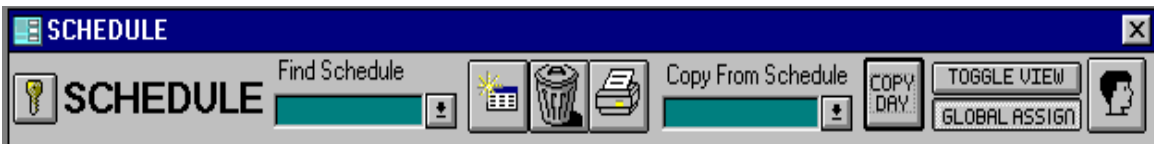
The **Copy Day** button activates the pop-up window shown on the left. Use this handy feature to copy the same daily schedule to other days of the week without having to re-enter the data. The arrow button displays the days of the week you wish to copy from, and you select the day or days you wish to copy to by selecting them with your mouse. Deselect days the same way. When finished click the OK button to apply.



Use the **TOGGLE VIEW** button to change from the regular or “default” screen to the underlying view and back again. Remember, the underlying view displays how and at what times your schedule rules will affect punches.



The **Global Schedule Assignment** feature allows you to assign groups of employees to schedules instead of having to individually assign them. Click the button and the pop-up window at the left appears. Select the group of employees you wish to assign to a schedule and click OK. Note: TimeSource Lite is shown. TimeSource Full version works the same plus it offers greater selections, including custom sort fields, etc.



The **Employee Roster** button displays a list of employees who are assigned to the schedule you are currently working on. If you wish to print the Employee Roster for the schedule that is displayed, click the printer icon located in the upper left side of the screen.
 Note: Employees are listed alphabetically according to their “Short Name” that you entered under the Edit Employees screen. The Employee Roster includes ALL employees assigned to the schedule *who are listed in the database*, both active and deleted.

Chapter 3 - Creating Schedules

The Scheduling module comes with a sample schedule built-in to it. To create a new schedule follow these procedures:


At the TimeSource main menu select **E**dit and **S**chedules.



Add New Schedule

Enter a number for this new schedule (up to 99).

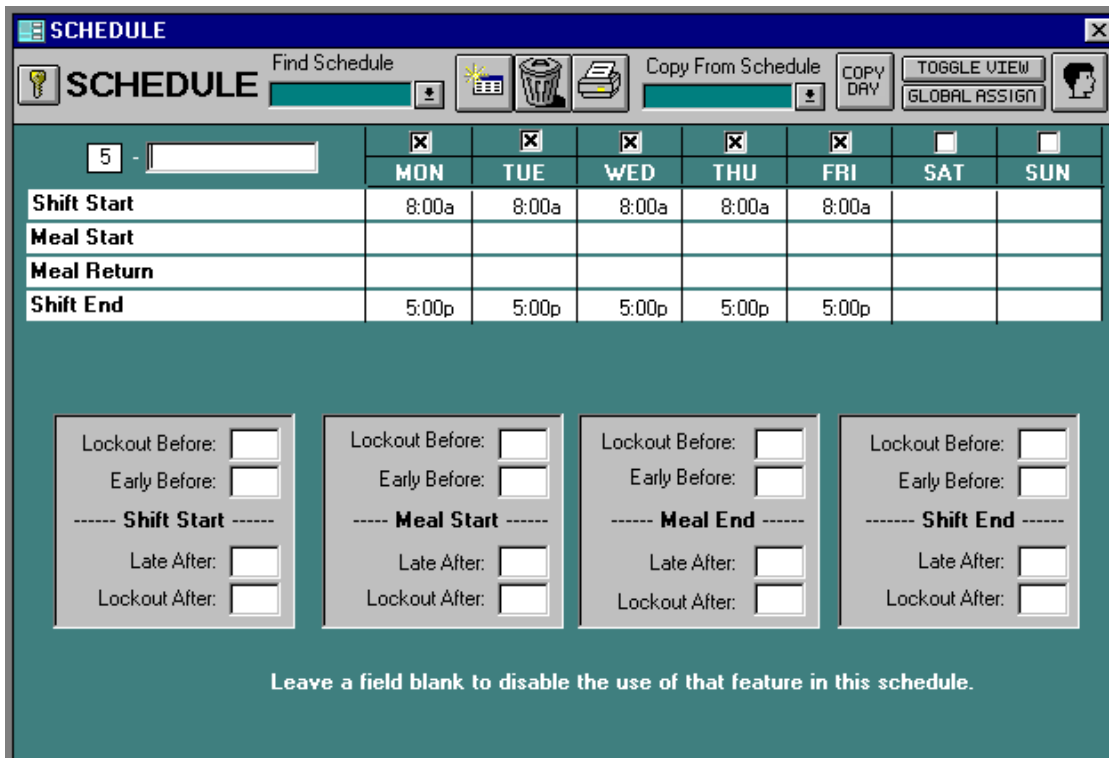
SCHEDULE#:

Click on  the add-record button located at the top of the screen.

Enter the number you wish to use for the new schedule. The schedule's number will be displayed on several reports that include schedule information; therefore you may wish to choose one that is meaningful to your company. If you choose to use the Find One For Me feature, it will automatically assign a non-used number at random. In any case, the system will not allow duplicate schedule numbers.

You must now choose a template from which to create your new schedule. You may use the default schedule template or copy another schedule to use as your basic template. If the new schedule is similar to an existing one you can save data entry time by copying an existing schedule and editing it.

This is the default scheduling template



SCHEDULE

Find Schedule

5 -

	<input checked="" type="checkbox"/> MON	<input checked="" type="checkbox"/> TUE	<input checked="" type="checkbox"/> WED	<input checked="" type="checkbox"/> THU	<input checked="" type="checkbox"/> FRI	<input type="checkbox"/> SAT	<input type="checkbox"/> SUN
Shift Start	8:00a	8:00a	8:00a	8:00a	8:00a		
Meal Start							
Meal Return							
Shift End	5:00p	5:00p	5:00p	5:00p	5:00p		

Lockout Before:

Early Before:

----- **Shift Start** -----

Late After:

Lockout After:

Lockout Before:

Early Before:

----- **Meal Start** -----

Late After:

Lockout After:

Lockout Before:

Early Before:

----- **Meal End** -----

Late After:

Lockout After:

Lockout Before:

Early Before:

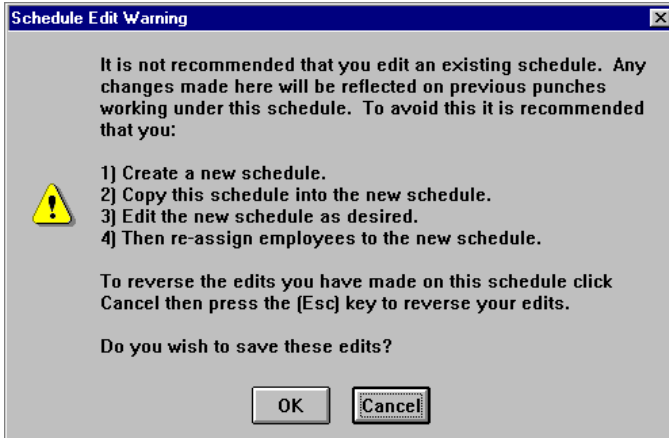
----- **Shift End** -----

Late After:

Lockout After:

Leave a field blank to disable the use of that feature in this schedule.

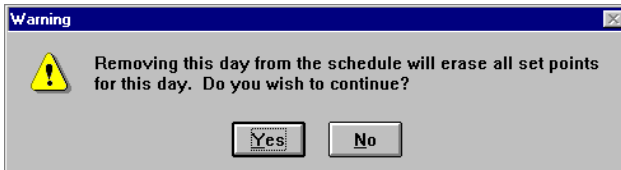
Enter a name for the new schedule. (Maximum 15 characters) The schedule's name will be displayed whenever you use the Find Schedule feature in the program. It will also appear in the Edit Punches, Edit Employees, and Edit Schedules screen. You should choose a name that will be informative such as **8:30a – 5:00p**, or **Day Shift**, etc. This will make assigning employees to schedules very simple. Schedule names are listed in an alpha-numeric order with numbers taking precedence over letters: **8:30a – 5:00p** would appear before **Day Shift**



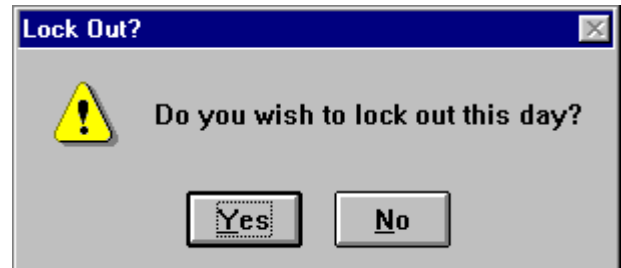
Whenever you create a new schedule a Schedule Edit Warning screen will pop up. This serves as a reminder to make sure you are creating a new schedule and not editing an existing one. It appears even when you are using a template or copying a schedule. To continue with your new schedule you need only click the OK button.

After you have entered a name for your schedule, tab to the next field, MON. If you wish the schedule to be in effect on Monday, select it by clicking on the box above MON. Continue tabbing & selecting the days you wish the schedule to be in effect.

When you select a day to NOT be scheduled ALL SET POINTS WILL BE ERASED. This means that there will be no schedule set for that day. If this schedule has been in use, any employee working on that day will have errors posted to his punch database as a *schedule violation*. If a large number of employees will be affected it might be best to create a new schedule with the changes needed and assign them to it.



If you say yes to continue you will then be given the option to lock out the entire day. If you choose to do so, a supervisor may still override the lock out at the clock. Any hours worked as such would be flagged as non-scheduled but approved.



You are now ready to establish the start and stop times for your shifts.

Note: Shifts may NOT cross the day change time.

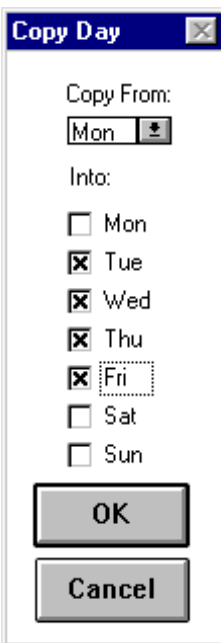
Enter the *starting time* of the shift. Enter this as 4 digits followed by a or p (AM/PM). Example: 08:30a - 05:00p

Note: If you leave this field blank the schedule will not be able to apply lockout functions nor will it provide tardy information. Usually this is done when certain employees work on an open or flexible shift schedule. In this case the schedule module will provide attendance – absentee information only.

Next you will enter the start and end of the meal period. If your company does not wish to monitor meal breaks you may tab past these fields.

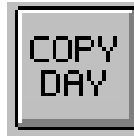
Enter the *ending time* of the shift. Use the same 4-digit format as before; always precede single-digit hours with a 0.

Note: As in item 7, if you leave this field blank the lockout feature will not function nor will reports be generated regarding early or late out punches.



When you have finished with Monday you may wish to copy it to the rest of the weekdays – unless they will be different. If you choose to do so click the **COPY DAY**

Button and select the days you wish to copy Monday to.



Chapter 4 - Defining Lockout Rules and Reporting Parameters

The following section deals with setting up the *Lockout and Reporting* parameters for **Shift Start, Meal Start, Meal End, & Shift End** features. Points to remember while setting up your lockout and reporting parameters are:

Lockout Before: <input type="text" value="7"/>	Lockout Before: <input type="text"/>	Lockout Before: <input type="text"/>	Lockout Before: <input type="text"/>
Early Before: <input type="text" value="7"/>	Early Before: <input type="text"/>	Early Before: <input type="text"/>	Early Before: <input type="text" value="0"/>
----- Shift Start -----	----- Meal Start -----	----- Meal End -----	----- Shift End -----
Late After: <input type="text" value="0"/>	Late After: <input type="text"/>	Late After: <input type="text"/>	Late After: <input type="text" value="7"/>
Lockout After: <input type="text"/>	Lockout After: <input type="text"/>	Lockout After: <input type="text"/>	Lockout After: <input type="text" value="7"/>

Leave a field blank to disable the use of that feature in this schedule.

Lockout periods work using *pairs* of START and STOP times. In our sample schedule of 08:30a – 05:00p we started the lockout period at 7 minutes after the Shift End of 5:00p, or 5:07p. The lockout period continues until we stop it at 7 minutes before the Shift Start of 8:30a, or 08:23a the next morning. Thus our *pair* consists of 05:07p and 08:23a. Employees attempting to punch during this period would not be allowed to do so.

Reporting parameters are established by the values placed in the Early Before and Late After fields. In our Shift Start example we entered 7 in the Early Before field. Thus anyone who clocks IN before 08:23a would be reported as an Early punch. (Also, a supervisor would need to override the lockout at the clock in order for this to occur.) By entering 0 in the Late After field any punch occurring after our Shift Start time of 08:30a would be flagged as a Tardy punch.

If you do not wish to use lockout for meal periods leave those fields BLANK. Keep in mind, blank means just that, not a 0. Our example schedule illustrates this. If you wish to use lockout or reporting for lunch punches you must enter Meal Start and Meal End times, then enter values in the Lockout Before, Early Before, Late After, and Lockout After fields. We chose not to use this feature as we use the Auto Lunch Deduct feature instead.

The Copy Schedule feature allows you to use your new schedule as a template to create additional schedules. By doing so you need not re-enter lockout and reporting information, simply set the Shift Start and Shift End times for your new schedule. The lockout and reporting values will apply to the new start and end times.

Lockout Before Enter the number of minutes preceding the *Shift Start* time you wish the Lockout function to *end*. In our illustration the value is set to 7 minutes. Therefore, if the Shift Start is set at 08:30a, you would not be able to punch IN until 7:23a.

Early Before Enter the number of minutes preceding the *Shift Start* time you wish to appear as IN Early on the *Exception Report*.

Late After Enter the number of minutes after the *Shift Start* that an IN punch will be considered tardy on the *Exception Report*.

Lockout After Enter the number of minutes after the *Shift Start* time you wish the Lockout function to *begin*. Employees who attempt to clock IN after this time will be locked out and unable to punch. As in all lockout features, a supervisor can override the clock to let someone in. Leave the field blank if you do not wish to use Lockout during this work period.

The Underlying Schedule View

The following illustrates how our sample 08:30a – 0500p schedule will work. You can look at this underlying view anytime you wish simply by clicking the Toggle View button. Remember, in our example we are using the Auto Lunch Deduct feature and as such, do NOT use Lockout during the shift. As such we will not be able to generate exception reports for Meal periods. If you require your employees to punch Out and In for meals you may wish to establish lunch rules. Use the same method as before when you set up your shift start-stop rules.

SCHEDULE							
Find Schedule		Copy From Schedule		COPY DAY		TOGGLE VIEW	
SCHEDULE		COPY DAY		GLOBAL ASSIGN			
1 - 08:30a - 5:00p	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	MON	TUE	WED	THU	FRI	SAT	SUN
End Morning Lock Before	8:23a	8:23a	8:23a	8:23a	8:23a		
Early Shift Start Before	8:23a	8:23a	8:23a	8:23a	8:23a		
Scheduled Shift Start	8:30a	8:30a	8:30a	8:30a	8:30a		
Late Shift Start After	8:30a	8:30a	8:30a	8:30a	8:30a		
Begin AM Lock After							
End AM Lock Before							
Early Start Meal Before							
Scheduled Meal Start							
Late Start Meal After							
Begin Meal Lock After							
End Meal Lock Before							
Early Meal Return Before							
Scheduled Meal Return							
Late Meal Return After							
Begin PM Lock After							
End PM Lock Before							
Early Shift End Before	5:00p	5:00p	5:00p	5:00p	5:00p		
Scheduled Shift End Time	5:00p	5:00p	5:00p	5:00p	5:00p		
Late Shift End After	5:07p	5:07p	5:07p	5:07p	5:07p		
Start Evening Lock After	5:07p	5:07p	5:07p	5:07p	5:07p		


Chapter 5 - Assigning Schedules to Employees

Individual Schedule Assignments – For Individual Employees

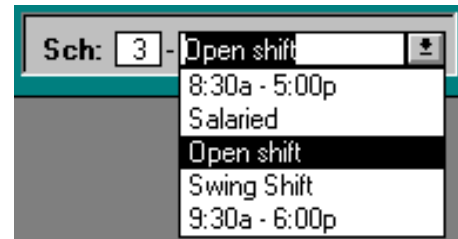
Employees may only be assigned to one schedule at a time. They may be assigned to a new schedule any time. Schedules do not take effect until they are sent to the clock via the polling routine. New schedules will not affect punches already polled and imported into the database, however, if you re-import punches via the Poll Log they will conform to whatever rules are in effect at the present time, including schedule assignments.

Employees need NOT be assigned to a schedule. In that case there will be no Lockout provision or Schedule Violation Reporting for those employees. The clock and software will treat them as if the scheduling module did not exist. Therefore, it is possible to assign some employees to schedules and others not at all.

Go to the Edit Employee screen and note the schedule assignment window located in the lower right hand corner.

Click the down-arrow  to display a list of your schedules.

Highlight the one you wish the employee assigned to. **That's all there is!**

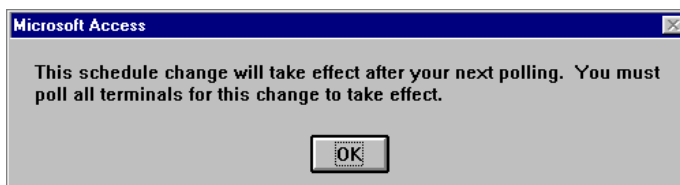


Removing employees from a schedule



To remove an employee from a schedule, go to the *Edit Employee* screen, highlight the **name field** of the schedule he is assigned to, and click the TRASHCAN icon located at the top of the screen. You may leave the field blank for no schedule assignment or select a new one from the drop-down list.

The following pop-up screen reminds you the schedule change will not take effect until you poll the clock(s).



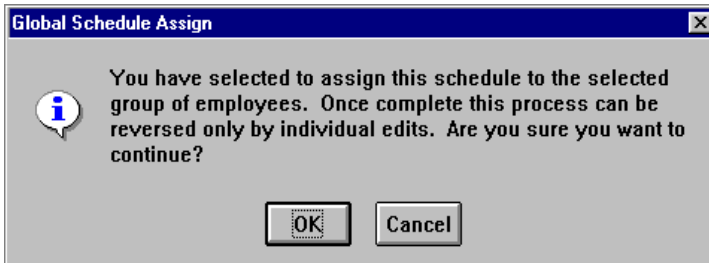
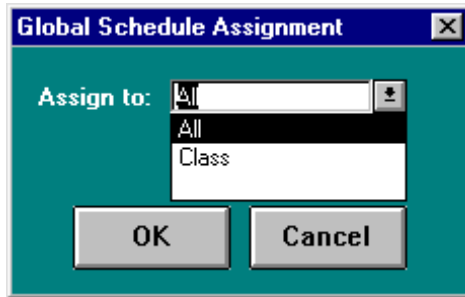
Global Schedule Assignment – For Groups of Employees

From the **Edit Schedules** screen go to the schedule you wish to assign employees to.

Click the Global Assignment button located in the screen's upper right hand corner.

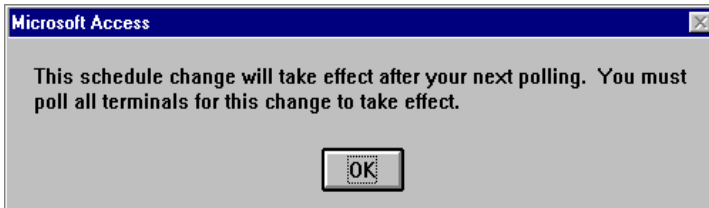


Select the employees you wish to assign, use the ↓ to display your choices.



Once you have made your selections click the OK button. A pop-up window provides the opportunity to cancel your selection. If you wish to apply the new assignments click the OK button. If you use this feature and later need to, you may remove employees from the schedule individually. (See removing employees from schedules in the preceding page.)

As in Individual Schedule Assignments, a pop-up window reminds you the new assignment will not take place until the next polling.



Chapter 6 - Punch Codes & Schedule Violations

Within the employees Punch Edit screen, schedule violations are automatically detected and flagged with the **W** warning symbol. Any such schedule violations may be approved or excused by edits at the punch editing screen. Supervisors may also override the Lockout function at the clock. Once a violation has been excused it will no longer be flagged with the **W** symbol and will no longer appear on Exception reports.

PUNCHES Find Employee: **ROBERT** STATUS: Edited

005 -- Parker, Robert

IN DATE AND TIME	OUT TIME	LUNCH	DEPARTMENT	HRS	CODES
7/12/99 Mon 8:26a S	Mon 5:02p S	30min	SERVICE	8.00	
7/13/99 Tue 8:25a S	Tue 5:07p S	30min	SERVICE	8.00	
7/14/99 Wed 8:30a S	Wed 5:02p S	30min	SERVICE	8.00	
7/15/99 Thu 8:25a S	Thu 5:02p S	30min	SERVICE	8.00	
7/16/99 Fri 8:24a S	Fri 5:01p S	30min	SERVICE	8.00	
7/19/99 Mon 8:26a S	Mon 5:03p S	30min	SERVICE	8.00	
7/21/99 Wed 8:32a S L	Wed 5:00p S	30min	SERVICE	8.00	E
7/22/99 Thu 7:26a S E	Thu 5:03p S	30min	SERVICE	9.00	W
7/23/99 Fri 6:38a S E	Fri 12:49p S E	30min	SERVICE	5.50	W

Record: 151 of 152

SCHEDULE

1 8:30a - 5:00p

In: Violation (Thu 7:26a) - early shift start

Out: OK (Thu 5:03p) - shift stop

Record: 4 of 6

DEPT NAME \$/HR

SERVICE \$13.50

* \$0.00

Record: 1 of 1

The scheduling module provides additional information for each punch pair as viewed under the Edit Punches screen. You will notice there are now two windows following each individual punch. Their purpose is as follows:

The first window displays a Code letter indicating the nature of the punch:

S = Shift Start or Stop, M = Meal Start or End, and C = Change Department

7/21/99	Wed	8:32a	S	L	Wed	5:00p	S	
7/22/99	Thu	7:26a	S		Thu	5:03p	S	
7/23/99	Fri	6:38a	S		Shift Start	49p	S	E
					M Meal End		S	
					C Change Dept.			

The second displays a Code letter indicating the nature of any Schedule violation:

A = Absent, E = Early, L = Late, N = Not Scheduled, or blank if OK.

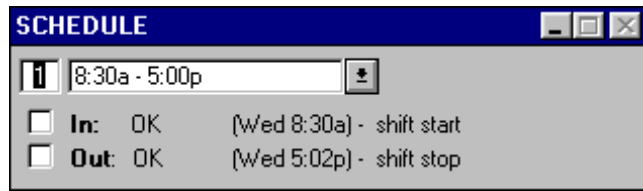
If you need to change the Code assigned to a punch click on the field, then use the ↓ arrow to select the new Code. The edited code E will then display showing that the punch has been changed.

Schedule Windows for Punch Pairs

The schedule window is located in the Edit Punches screen. The default location for the window will always be the lower right hand corner, however you may click and drag the window to another location if you prefer. The following is an explanation of the punch windows you will normally encounter.

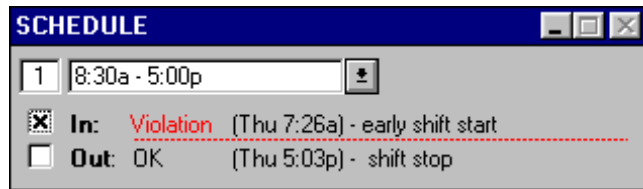
Normal Punch Pair

A schedule window is displayed for each punch pair line. The window changes constantly as you move the cursor to a new line of punches. It displays the schedule number, name, punch time, status, and indicates if there are any schedule violations. If need be, you may change the schedule assignment for any punch pair any time. Use the arrow key \downarrow to view and select the schedule you wish to assign the punch pair to. This is a particularly useful feature if an employee is reassigned to a schedule for one day. This method does NOT reassign the employee to the schedule on a permanent basis; it only affects the one punch pair.



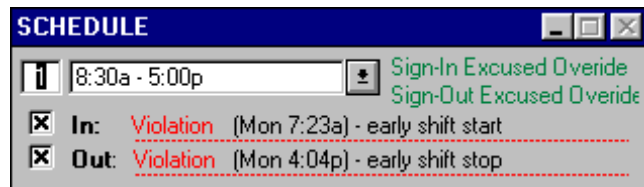
Punch excused at the PC

If you wish to excuse a schedule violation you need only click the box next to the IN or OUT. To remove the W warning symbol from the punch pair line, click the button located at the left end of the punch pair line, then tab through the fields. As you tab past the end of the line the W will go away.



Punch excused at the clock

If a supervisor overrides a Lockout at the clock it will appear as shown. In this example the employee arrived an hour early and departed an hour early.



Chapter 7 - Supervisor Lockout Override at the clock

It is possible for the supervisor to override the lockout feature at the clock. This may be necessary when employees need to use the clock during a lockout period. The supervisor may allow a single punch or he may disable the lockout feature altogether for a large group of employees. The supervisor may also approve or disapprove the override punch.

As an example, if someone were called in to work early, the supervisor could override the lockout and approve the employee's punch. On the other hand, if an employee arrived late the supervisor might override the lockout but choose to not approve the tardy punch.

Finally, if your company policy does not allow employees to work on Saturday and you had to call a crew in for an emergency, you could turn off the lockout feature at the clock and later turn it back on. Punches under this last scenario would all be approved.

Individual override

If an employee attempts to punch IN or OUT during a lockout period a message of **See Supervisor – Entry Cancelled** will be displayed. This display will return to its normal data entry prompt after five seconds. It is during that five-second period that the supervisor may override the lockout by the following method:

While the display shows the "See Supervisor – Entry Cancelled" message he should press the padlock key and enter his 6-digit code. This is the same code used to enter the supervisor mode as set up when you installed the terminal.

He will see a 2-line display that states: 1 = Excused and 2 = Unexcused. As soon as he presses either key the display will show "You are now signed IN / OUT" as the case may be. Note: If the employee contests an unexcused punch the system supervisor can change the status at the PC later.

Group override

Simply put, this involves turning the lockout feature off. Doing so will automatically accept punches and post them as approved at the PC. You should understand that if you turn the feature OFF it affects everyone who uses the clock, regardless of their schedule. Follow this procedure to override:

1. Enter your supervisor code via the padlock key.
2. Scroll to the line that states: Lockout Yes
3. Press the Enter key
4. Use the Arrow key to change the setting to No.
5. Press the padlock key. This will return the clock to its normal data entry mode and the employees can punch IN and OUT without lockout rules.

When you wish to return to the normal lockout mode simply reverse **the procedure**.

Chapter 8 - Exception Reports for Schedule Violations

The Scheduling / Lockout module provides reports that include schedule violations. These are available through the regular Reports menu under the Exception Report. When you select the exception report you will be presented with the following pop-up window.

Use this to select which Schedule violations you wish included on the report and click the OK button. The report will follow all of the regular rules as far as who is included, time period, date-range, etc. When your report has been processed you will be able to view it or print it, as you require.

Notice in the example reports; Schedule Codes are listed at the top of the page for easy reference. As you look to the right of the report under **SCHEDULE** you will see the employee was assigned to schedule 01, had a Late Start punch, and it was Unexcused.

(01 LSU S) His second punch of the day was posted as S with no violations.

Time Card Reports and Employee Reports with details also include schedule information. Notice that Wednesday reflects the same coded information as the exception report.

EXCEPTION REPORT FOR LAST PAY STARTING: 7/11/99 - 7/17/99

SCHEDULE CODES: (A-absent, E-early, L-late, N-not scheduled) (S-start/stop, M-meal) (X-excused, U-unexcused)

Schedule Violations:

(A-absent, E-early, L-late, N-not scheduled) (S-start/stop, M-meal) (X-excused, U-unexcused)

PROBLEM Late Shift Start

ID# - EMPLOYEE	DATE	TIME IN	TIME OUT	LUNCH	DEPARTMENT	DEPT HRS		SCHEDULE
005 - ROBERT	7/14/99	Wed 8:45a	Wed 5:02p	30min	SERVICE	7.75	W	01 LSU S

TIMECARD REPORT FOR LAST PAY: 7/11/99 - 7/17/99

SCHEDULE CODES: (A-absent, E-early, L-late, N-not scheduled) (S-start/stop, M-meal) (X-excused, U-unexcused)

EMPLOYEE: 005 -- Parker, Robert

DATE	TIME IN	TIME OUT	LUNCH	DEPARTMENT	DEPT HRS	STD	OT1	OT2	SCHEDULE
7/12/99	Mon 8:26a	Mon 5:02p	30min	SERVICE	8.00	8.00			01 S S
7/13/99	Tue 8:30a	Tue 5:00p	30min	SERVICE	8.00	8.00			01 S S
7/14/99	Wed 8:45a	Wed 5:02p	30min	SERVICE	7.75	7.75			W 01 LSU S
7/15/99	Thu 8:25a	Thu 5:02p	30min	SERVICE	8.00	8.00			01 S S
7/16/99	Fri 8:24a	Fri 5:01p	30min	SERVICE	8.00	8.00			01 S S
Employee Totals:					39.75	39.75			

SIGNATURE.....: _____

MEMO:

Chapter 9 - TimeCalculator terminal function keys

The new TimeCalculator Ver. 7 terminal provides a function key to accommodate TimeSource Meal scheduling features. If your TimeCalculator terminal has a green keypad with a Dept. Change key it may be used as a function key, provided the terminal has a Ver. 7 EPROM.

Note: To determine what version you have, go to Show Options in the Supervisor mode of the clock and it will automatically list. If yours is not a Ver. 7 you should contact your ICON Time Systems dealer and ask about an EPROM upgrade.

When you press either the Dept. Change key or Function key, depending on your keypad version, you may select the following:

- 0 = Department change
- 4 = OUT to Lunch
- 6 = IN from Lunch

If you are NOT using the Meal feature in scheduling and you press the Department Change / Function key you will be taken directly to the department list. If you are using TimeSource with the Job Costing module you will be prompted for job and task information via the department key. Task information will be requested in the same manner.

Note: Scheduling lockout only affects IN / OUT / LUNCH OUT / LUNCH IN punches. Department transfers, job numbers, and task information are not affected. Nor will it affect TIPS or Quantity / Piece Counts as these are not IN / OUT values.