TotalPass® B600

User Guide





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Chapter 1: Getting Familiar with Your Time Clock

Welcome

Thank you for choosing IconTime 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 IconTime Systems wish to thank you for placing your trust in our products. We pride ourselves on being innovators in the time and attendance industry, developing products that are easy to install, simple to operate, and reliable.

Use this guide to learn how to use the TotalPass B600 time clock to perform essential tasks that will make tracking employee time, as well as your payroll processes, more efficient.

The TotalPass B600 offers breakthrough web-enabled technology that brings the simplicity of embedded software to your time and attendance system, without requiring Internet access.

This guide will help you set up the clock and use the many features to automate time and attendance, streamline your payroll process and generate reports that provide insight into labor costs.

System Requirements

For Network Access to the Time Clock

- Any Web browser on PC, Mac, tablet, or smartphone.
- An available Ethernet port or wireless network.
- Remote Internet access also requires Internet and port forwarding to port 9844 or port 80.

For Direct Connection to the Time Clock

- Use any Web browser on a PC or Mac where the time clock is directly connected to the computer.
- Available USB port on Windows PC or available Ethernet port on Windows PC or Mac.

Payroll Export Utilities

- Paychex Flex, SurePayroll, Paychex Preview, Paycom, Paylocity, ADP Workforce Now, and QuickBooks Online exports are compatible with all operating systems.
- Windows Vista or above required for QuickBooks Plug-in* and the ADP Export.
 - * Only available with QuickBooks desktop versions.

Internet connection required

Ethernet connection is required for the following functionality:

- Emailing alerts, backups or payroll reports
- · Connecting multiple time clocks together
- Accessing the time clock from more than 1 computer (Network connection required)

Features

The **TotalPass B600** was designed to streamline the time and attendance and payroll process. The TotalPass software is build into the time clock and provides a wealth of features to save you time and improve accuracy.

- Capacity of 100 employees and upgradeable to 500 employees
- Multiple punch options including Web Entry, PIN, biometric fingerprint, and proximity badge (sold separately)
- · Punch photo verification in case of failed finger scan
- 15 employee Web Punch Entry licenses included, upgrade to a maximum of 50
- Proximity badge entry option (badges sold separately)
- Email alerts including: high/low hours worked, approaching overtime, punch notifications, and more
- Import employees to the time clock from a CSV file
- Automatic backup of time clock data, via email
- Email employee timecard reports
- Labor distribution reports
- Export to QuickBooks, ADP, ADP Workforce Now, Paychex Flex, Paychex Preview, SurePayroll, Paycom, or CSV
- SSL data encryption for secure data transfer over the Internet
- Configurable for remote Internet access
- Automatic lunch time deduction
- Timecard, Attendance, and Department-based reports
- Enter Holiday and NonWorked Hours for one or more employees
- Track tips, job numbers, or piece counts with employee entry at the clock
- Department tracking with department transfers at the clock
- Individual supervisor logins with employee assignment
- Connect-up to 32 clocks together (500 employee max)

Available Totalpass Upgrades

Upgrade Employee Capacity

Expand your system with your business; upgrade the employee capacity from the standard of 100 employees to 250 or 500 employees.

Proximity Badges

Offer employees an alternative way to clock in/out with proximity badges that can be used for "no-touch" entry.

Additional Web Punch Licensees

The TotalPass B600 includes 15 Web Punch Entry licenses. Additional web punch licenses may be purchased in sets of 5 up to a maximum of 50.

Connection/Setup

Refer to the TotalPass <u>Quick Start Guide</u> for instructions on setting up your employee time clock's connection and logging into your time clock for the first time.

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 must enter the address exactly as displayed below. For example, if the assigned address is 192.168.2.103, enter that text directly into the address field, preceded wth **http://**.



Note:

If you are logging in using USB, navigate to http://totalpass. timeclock or enter http://172.20.20.1 as the IP address.

Support and Troubleshooting

For your convenience, troubleshooting tips and how-to can be found on our technical support site at www.support.icontime.com.

This system includes a 30-days trial of <u>TotalPass B600 Customer Care Pack</u>, which includes unlimited telephone, email, and remote assistance support. Support can be reached Monday through Friday from 7:30am to 5:00pm (PST) at (800) 847-2232 option 1 or via email at <u>support@icontime.com</u>.

Integration with Payroll

Built-in Exports

Your time clock includes a Paychex Flex, Paychex Preview, SurePayroll, Paycom, Paylocity, ADP Workforce Now, QuickBooks Online, and QuickBooks (Pro, Premier, Enterprise) export formats. It also includes a CSV Export option used for viewing time clock data in Excel or importing into other third-party payroll programs.

Desktop Installed Export Utilities

Exporting time clock data to PC versions of QuickBooks or ADP requires the installation of an export utility program. Select on the appropriate link below:

- QuickBooks www.icontime.com/utc-quickbooks-export
- ADP www.icontime.com/software/ADP_Export_1.0.12.exe

Register Your Time Clock

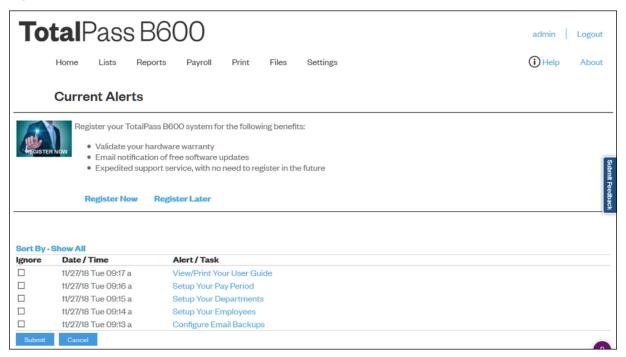
The first time you log in to your time clock, you will be prompted to register it. Register your time clock to ensure that you receive email notification of free software updates, your manufacturer's 1-year hardware warranty, and 30 days of free technical support.

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 section, 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 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 and time clock activity alerts. For instructions on customizing your alert settings, refer to <u>Setting Your Alert Preferences in Chapter 2</u>.

When you no longer want to be notified of a task or alert, check the box next to that item in the **IGNORE** column, and click **Submit**. If you would like to see past alerts, click **Show All**. To view the details of the alert, click the alert link in the **ALERT/TASK** list.

Lists Menu

Use the Lists menu for adding, modifying or deleting employees, departments, supervisors, or enabling or disabling additional time clocks connected to the system.

For instructions on setting up employees for instructions on setting up employees, refer to: "Chapter 4: Setting Up Your Employees".

For instructions on configuring departments and additional time clock supervisors, refer to: "Chapter 7: Department and Supervisors".

Reports Menu

Your time clock comes with four reports that make it quick and easy to get the information you need to

complete your work and process payroll. In addition, with the Create Report option, you can run custom filters for specific punch times, dates, employees, and departments. Use the Reports menu to access the reports. Refer to Chapter 7: Generating Reports, for additional information on generating and customizing reports.

Payroll Menu

The Payroll menu allows you to export your time clock data to your payroll program. In addition, you'll find options to email the timecards to individual employees or as one report. For additional information on sending your time clock data to payroll, refer to "Chapter 8: Generating Reports".

Files Menu

Use the Files menu to back up data, restore data back-ups, Delete Old Punches, and update your employee time clock.

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.

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:

- Set up your pay period and overtime rules
- ✓ Set up punch rounding and Employee Input options
- ✓ Customize the PIN length and Alerts Preferences

Setting Your Pay Preferences

There are two ways to access your Pay Preferences:

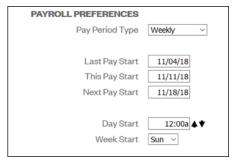
- Click Setup Your Pay Period in the Alerts/Task list
- Select Preferences from the Settings menu

Follow the instructions below to set your Pay Preferences.

- Complete the Company Name field and, if applicable, the Company Payroll ID field. These will be used when emailing time.
- Select the applicable option from the **Pay Period Type** drop-down menu:
 - o Weekly Employees are paid once per week
 - o Bi-Weekly Employees are paid every two weeks
 - o **Semi-Monthly** Employees are paid twice per month
 - o **Monthly** Employees are paid once per month
- If you select the semi-monthly pay period, two additional date fields display that must be completed.
 - o Type the first day of the monthly that your pay period begins in the Start Semi-Monthly on field.
 - o Type the second day of the month that your pay period begins in the and on field.
- 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.

- Click in the This Pay Start field to open the calendar and select the date that your current pay period started.
- Click in the **Next Pay Start** field to open the calendar and select the date that your next pay period will start.
- 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.
- Select the day of the week that your work week begins form the Week Start drop-down menu. The company's weekly overtime calculations are based on this setting.



Setting Your Overtime Preferences

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

Follow the instructions below to set your Overtime Preferences.

 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.

| OVERTIME PREFERENCES | | |
|---------------------------|-------|-------|
| Day OT1 After | 8.00 | Hours |
| Day OT2 After | 0.00 | Hours |
| Week OT1 After | 40.00 | Hours |
| Week OT2 After | 80.00 | Hours |
| Consecutive Day OT | Yes ▼ | |
| Consecutive Day OT On | 6 | Days |
| Consecutive Day OT1 After | 5 | Hours |
| Consecutive Day OT2 After | 8 | Hours |
| OT1 Multiplier | 1.50 | |
| OT2 Multiplier | 2.00 | |

Note:

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).

- 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.
- 3. To set consecutive day overtime rules, change the Consecutive Day OT drop-down menu to Yes. This option will pay OT1 and/or OT2 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 day 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 until the clock fully reboots.

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

Enhanced Overtime Preferences

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

Consecutive Day OT1 On ____ Days - determines when Consecutive Day Overtime should begin to accumulate.

Example: If **Consecutive Day OT** On is set to 6 days, employees will receive **Overtime 1** on the sixth consecutive day of work. If the **Consecutive Day OT1** After setting is set to 5 hours, the first 5 hours worked on the sixth day is considered straight time and the rest of the hours will be **Overtime 1 (OT1)**.

Consecutive Day OT2 After - refer to the previous example.

Note:

Labor regulations differ from state to state so please refer to your state's guidelines for applicability.

If this entry is set to 8 hours, employees will receive Overtime 2 on the sixth consecutive day of work for working over 8 hours in the day.

Note:

Making a change to the overtime preferences will prompt the time clock to restart. This will make the time clock unavailable until it fully reboots.

- **OT1 Multiplier** enter the pay rate for Overtime 1 (usually 1.5).
- OT2 Multiplier enter the pay rate for Overtime 2 (usually 2).

Setting Your Punch Preferences

Select Settings | Preferences and click on the Punch tab. The Punch Preferences section displays.

Note:

The rounding rule selected affects all punches system wide.

The original punch time remains unchanged on the employee time card.

The punch(shift) hours round ac-cording to the rounding rules set.

Follow the instructions below to set your Punch Preferences.

- Select the applicable rounding type from the Rounding Type drop-down menu.
 - **None (No Rounding):** Accumulates 100% of all time registered on the clock.
 - **15 Minute (7/8 Rounding):** Rounds and calculates punches to the nearest quarter hour (15 minutes). The split occurs in the middle of each quarter hour.

To illustrate: An In punch of 7 minutes 59 seconds rounds back

An In punch of 8 minutes 00 seconds rounds forward

Example: An In punch of 7:52 a.m. would calculate as 7:45 a.m.

An In punch of 7:53 a.m. would calculate as 8:00 a.m.

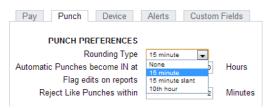
• **15 Minute Slant (10/5 In, 5/10 Out):** Quarter hour rounding similar to above except the break point occurs on the 5th minute or 10th minute depending on whether it is an In punch or an Out punch.

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 7:49 a.m. would calculate as 7:45 a.m.

An In punch at 7:50 a.m. would calculate as 8:00 a.m.

An Out punch at 4:49 p.m. would calculate as 4:45 p.m.

An Out punch at 4:50 p.m. would calculate as 5:00 p.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 th | Minutes 10 th |
|--------------------------|--------------------------|
| 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 (.0).

An In punch from :30 minutes after the hour to :35 minutes after the hour rounds to .5.

Example: An In punch at 7:30 a.m. would calculate at 7.5 a.m.

An Out punch at 4:05 p.m. would calculate as 4.0 p.m.

• 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.

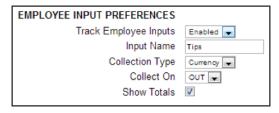
This option is only used when an employee entry method is set to Automatic. Refer to <u>"Chapter 4: Setting Up Your Employees"</u> for additional information.

- Check the **Flag edits on reports** checkbox to flag manually edited punches on reports. If checked, all edited punches are marked with **E**.
- Type the number of minutes in **Reject Like Punches within** to reject the same type of punch at the time clock, within the minutes specified. The second punch is ignored.
- 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 until the clock fully reboots.

Setting Employee Input Preferences



Your time clock can allow an employee to enter data at the clock (Employee Inputs) on either an In or Out punch. Employee Inputs are used to track employee tips, piece counts, or job numbers. This optional data will be recorded on the Timecards and Timecards by Dept. Report.

- Select Settings | Preferences and click on the Punch tab. The Punch Preferences screen displays.
- Follow the instructions below to set your Employee Input Preferences.
- Enable Employee Inputs by selecting Enabled in the Track Employee Inputs drop-down menu. Additional Employee Input options will display.
- Enter a custom name for the Employee Input. Common names may be; Tips, Job #, Piece Counts.
- Select the **Collection Type** from the drop-down menu.
- Currency: used for collecting tips or other currency related data.
- Number: used for collecting any non-currency related numerical data such as piece counts or job numbers.
- To determine whether the employee will enter the data on the In punch or Out punch, select the **Collect On** value from the drop-down menu.
- If you would like to total the employee input data on the Timecard report, select the **Show Totals** check box.

Setting Your Device Preferences

Note: Employee Inputs must also be enabled for each induvial employee.

Refer to Assigning Changing Departments for instructions.

Select **Settings | Preferences** and click on 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.

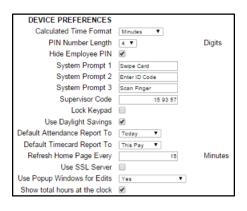
Follow the instructions below to set your Device Preferences.

- Select to display minutes on your reports in decimal or hh:mm (minutes) format from the **Calculated Time Format** drop-down menu.
- Select the length of the custom employee PIN (ID number) from the PIN Number Length
 drop-down menu. Customize employee PINs (ID numbers) in the Edit an Employee screen.
 Refer to "Chapter 4: Setting Up Your Employees", for additional information.
- 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.
- Use System Prompt 1, 2, and 3 fields to set up to three custom prompts at the employee time clock terminal. The
 default system prompt on the time clock display is, Enter PIN, Wave Badge.

Companies often use this feature for employees that speak languages other than English and to send global messages to employees.

| Examples | Marque Su Numero |
|----------|------------------|
| | Work Safely |
| | Closed Tomorrow |

- 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.



- 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 and you do not want employees using the keypad.
- Check the Use Daylight Savings checkbox if you want the time clock to automatically adjust time for daylight savings.
- Select the default time frame to view the Attendance Report screen from the **Default Attendance Report To** drop-down menu.
- Select the default time frame to view the Timecards Report screen from the **Default Timecard Report To** drop-down menu.
- Type the number of minutes to refresh the alerts on the Home page in the Refresh Home
 Page Every field. If your system runs slow, type a larger number for the refresh time.
- SSL data encryption ensures that all data passed between the time clock and web browser remains private. Check **Use SSL Server** to enable this option.

Note: You cannot enable SSL with a direct USB connection to the computer. The time clock must be connected to the network.

- Use **Popup Windows for Edits** includes 3 options:
 - o Yes have a separate pop-up window display when editing a punch in a report screen.
 - o **Yes with Batch Edits** uses the pop-up window described above. Report will not refresh with each change submitted. You must refresh the page to see the report with the edited punches.
 - o No
- Check the Show total hours at the clock checkbox to display the employee's total daily hours after the employee punches out.
- Click **Submit** to save your settings and return to the Home page.

Email/Backup Preferences

The TotalPass B600 allows payroll reports and system alerts to be automatically e-mailed to one or more supervisors. The system will send email alerts if an employee has a photo punch that needs verification, as employees come and go, before they accumulate overtime, if they leave early, and more.

Note: A network connection is required to use email functionality in the clock.

In addition, backups of your time clock data can be automatically emailed to one or more recipients, daily, weekly or monthly.

What is an SMTP Server?

Important: To send emails, you must have a SMTP server available. Contact your network administrator to find out if your company has SMTP server. We recommend using Google's free Gmail account for companies that don't have an available SMTP Server. To use this service, you must have a Gmail account

An SMTP server works like a postal 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 intended mail recipients.

Outgoing Email Settings (SMTP Server)

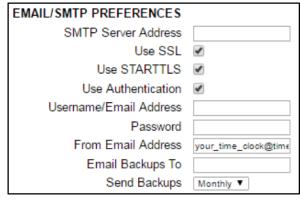
To assign your SMTP server settings, go to Device Preferences by clicking **Settings | Preferences | Device find Email/Backup Preferences.**

- Type your complete SMTP e-mail server address in the SMTP Server Address field. If you do
 not have this information, contact your network administrator or your service provider.
- 2. **If you enable SSL**, 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.

- 3. Check the **Use SSL** 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.
- 4. Check the **Use STARTTLS** checkbox if you are using SSL and your SMTP service provider requires that you first connect to the server using a secure connection.
- 5. Check the **Use Authentication** checkbox if your SMTP server requires a username and password to send e-mails.
- 6. Enter the **Username** or **Email Address** used to accees your SMTP service (email account).
- 7. If you checked **Use Authentication**, enter the Password of your SMTP service,
- 8. Type the e-mail address you want to display in the **From** field in your e-mail in the **From Email Address** field. The default setting is Your_Time_Clock.
- Enter the email address where you would like a copy of your backups automatically sent to in the **Email Backups To** field.
- 10. Select how often you would like those backups e-mailed; never, daily, weekly, or monthly. Emails will be sent at 2:30 am. Refer to "Setting up Scheduled Automatic Backups" to complete the Automatic Backup setup.
- 11. Click Submit to save your settings.



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.

Outlook/Live/Hotmail

SMTP Server Address: smtp.live.com:587

Use SSL:checkedUse STARTTLS:checkedUse Authentication:checked

Username/Email Address: Account email address (user@hotmail.com)

Password:account passwordFrom Email Address:account email address

Gmail

SMTP Server Address: smtp.gmail.com:587

Use SSL:checkedUse STARTTLS:checkedUse Authentication:checked

Username/Email Address: Gmail account email address (user@gmail.com)

Password:Gmail account passwordFrom Email Address:Gmail account email address

Comcast

SMTP Server Address: smtp.comcast.net:465

Use SSL: checked
Use STARTTLS: un-checked
Use Authentication: checked

Username/Email Address: Comcast username

Password: Comeast account password
From Email Address: Comeast account email address

Verizon

SMTP Server Address: outgoing.verizon.net:587

Use SSL:un-checkedUse STARTTLS:un-checkedUse Authentication:checked

Username/Email Address: Verizon username

Password: Verizon account password
From Email Address: Verizon account email address

Apple MobileMe / iCloud

SMTP Server Address: smtp.mac.com:587 **Use SSL:** user preference

Use STARTTLS: if user selects to use SSL above

Use Authentication: checked

Username/Email Address: MobileMe/iCloud username

Password:MobileMe/iCloud account passwordFrom Email Address:MobileMe/iCloud account email address

Chapter 3: Email Alerts

The TotalPass B600 allows payroll reports and system alerts to be automatically e-mailed to one or more supervisors.

The system will send email alerts according to your preferences for event such as:

- ✓ Approaching Overtime
- ✓ Punch Notifications
- ✓ Low Hours
- ✓ Maximum Hours
- ✓ Backup Reminders

Setting Your Alert Preferences

- Select Settings | Preferences and click on the Alert tab 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.
- Type the least number of hours an employee can work per shift in the **Alert Low Hours at** field. If an employee works fewer hours than is specified, an alert generates. To disable this alert, set the alert value to **0**.
- Type the number of hours an employee can work per shift 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**.
- Type the maximum number of hours an employee can work per shift in the **Maximum Punch Time at** field. If an employee works a shift more than the hours specified, an alert generates and the hours stop accumulating for that given shift. To disable this alert, set the alert value to **99**.
- Alert Day Overtime OT at 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 post to the Home page when the employee reaches 6 hours worked for the day.

 Alert Week Overtime OT at triggers an alert before employees reach weekly overtime by using the weekly overtime value that you set under Overtime Preferences.

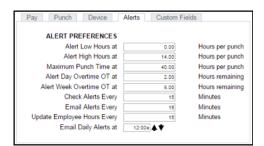
Example: If you have Week OT1 set to 40 hours and Alert Week Overtime OT set to 8 hours, an alert post to the Home page when the employee reaches 32 hours worked for the week.

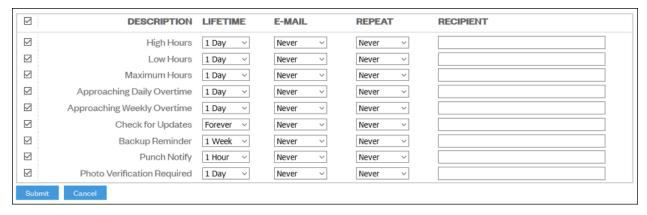
- Type the number of minutes to check alerts in the Check Alerts Every field. New alerts are
 checked and posted to the Home page based on the time entered here. To maximize system
 speed and performance, we recommend setting this value to 10 minutes or more.
- Click Submit to save your settings and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





- Enabling/Disabling Alerts: To disable an alert, deselect the checkbox in the farleft 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**: Select how often you want an email alert sent.
- Repeat: Select how often you want an email alert to be resent using this drop-down menu.
- **Recipient**: Type the alert recipient's email address. For multiple addresses, add a space or comma in between each email address.

Note:

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

Creating Custom Fields

TotalPass offers 10 additional fields for tracking static information in Custom Fields.

In addition, Timecard reports can be filtered based on the Custom Field values assigned to an employee with Labor Distribution Reports.

Examples:

- Location
- Account
- Part Time / Full Time Status

ADP Export:

Use the Custom Field to track the employee's ADP Payroll ID. Refer to the ADP Export User Guide installed with the ADP Payroll Export for instructions.

Custom Fields values can be added to the following locations.

- **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.
- Department: These fields display on the bottom of the Edit a Department page.

Follow the instructions below to set your Custom Fields.

- Type the title for the custom information in the **Title for Field X field** (X being the field number).
- Select where this custom field should display from the **Assign Field X** to drop-down menu (X being the field number).
- Click **Submit** to save your settings and return to the Home page.
- Go to the new custom field on the page specified and enter information as needed.
- For additional information on generating reports based on the custom field value assign to an employee, refer to "Chapter 8: Generating Reports".



Chapter 4: Setting Up Your Employees

After setting up your pay period and other preferences, set up the employees in the system.

- ✓ Adding employees
- ✓ Setting up automatic lunch deductions
- ✓ Set up Web Punch entry

TotalPass B600 comes with a 50-employee limit and can be upgraded to handle up to 500 employees.

Employee List

A list of your employees and their ID numbers are in the Lists Menu under Employees. Click on the column header to sort by that column.

| Employee List | | | | | | | | | |
|---|------------|------------|-----------|------------|----------|-----------|--------------|-------|--------|
| Select All Select None Show Inactive Columns Employees: 101 Active 0 Inac | | | | | Inactive | | | | |
| Time Remainin Before Overtin | | | | | | | | | |
| Active | Payroll ID | Display ID | Last Name | First Name | M.L | Web Punch | Biometric | Daily | Weekly |
| \square | 0001 | 0001 | Bebe | Bebe | | | Not Enrolled | 8.00 | 40.00 |
| \square | 0023 | 0023 | Mary | Mary | | ⊗ | Not Enrolled | 8.00 | 40.00 |
| \square | 0043 | 0043 | Jane | Jane | | ⊗ | Not Enrolled | 8.00 | 40.00 |

Make Employees Inactive

Making an employee inactive removes them from the Employee List and hides the employee data from the reports. Their punch data remains stored in the time clock.

- To make an employee inactive, de-select 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.

Customizing the Columns

- Select the Columns link to hide or show columns on the Employee List.
- Click on the column header to sort by a column.

Select None Show Inactive Columns Payroll ID Display ID Las 2198 2198 Emp 2208 2208 Emp First Name

✓ M.I.

✓ Web Punch

☑ Time Remaining Before Overtime

Employee 0045

Empl 0045

EMPLOYEE INFORMATION

Payroll ID

First Name Middle Initial

Last Name

Address

Note

Display Name

Time Remaining Before Overtime

• The **Daily** column displays the number of hours left in the day before the employee starts earning daily overtime.

Active

2249

2249

2254

- 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 when this option is enabled in Pay Preferences.

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

Adding Employees

There are two options for adding employees to the time clock:

1. Importing a list of Employee's from a CSV file.

Follow the instructions in the Importing Employees to Your Time Clock Guide

2. Adding each employee individually

To add your employees individually, 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 # provided by the payroll company. This Payroll ID will be used when generating payroll exports.

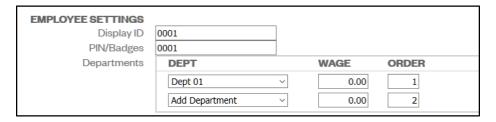
Note: This field does not need to be completed when using the QuickBooks Plug-in or ADP Export Utility

- **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 employee's address. This field is optional.
- Email Address: Enter the employee's email address used for sending individual timecards to the employee(s).

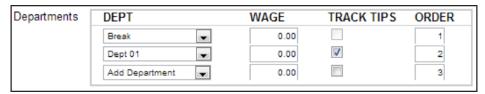
Note: Timecard Reports are sorted by Display Name.

Employee Settings

- **Display ID:** Type the assigned company Employee ID number, Payroll ID number, or PIN number. The Display ID is the number that will appear on the timecard reports.
- PIN/Badges: The employee PIN number is used to clock In or Out at the time clock. Type the
 custom PIN you want to assign to the employee. The default PIN length is set to four digits;
 you can customize the PIN length up to nine digits under Device Preferences.
- **Departments:** Select departments to assign to the employee. If you are tracking paid breaks, set the first department to Break.
- Wage: Specify a wage the employee is paid for working in the assigned department.



If **Employee Inputs** are enabled under **Punch Preferences**, you will see an additional check box option in the departments table to track employee input.



If you are assigning more than one department, specify the order that the departments will be displayed at the clock when the employee clocks In.

Note: If you are tracking breaks, the Break department will always be listed first.

For additional information on setting up departments, refer to "Chapter 7: Department and Supervisors".

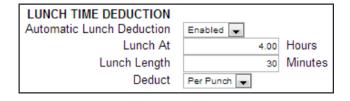
- Active: All employees default to an active status. De-select this checkbox to make the employee inactive and to hide their name from reports.
- **Entry Method:** This option determines the procedure for punching in and out by the employee at the employee time clock. Select the desired method from the drop-down menu.

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

- o **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.
- o **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.
- o **Automatic:** This is also known as "Swipe and Go." After the employee enters their PIN/badge number, the time clock displays the employee name and the message, Entry Recorded. The employee is not allowed to make any other selections at the time clock. This provides a simple and quick method to punch at the time clock. 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 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.
- Select an interval from the Deduct field pulldown menu.
 - o When **Per Punch** is selected, the time worked from the last In punch is used to determine whether the **Lunch At** threshold has been met. If an employee goes to break or punches Out before the lunch time is deducted, the **Lunch At** calculation will start again once the employee has clocked In. Selecting this option will allow lunch time to be deducted multiple times per day.
 - When **Per Day** is selected, the total amount of the employee's hours for the day will be added up to determine whether the **Lunch At** threshold has been met. Lunch deduction will occur once the threshold has been met.

Note:

Only one lunch deduction will occur per day when Deduct is set to Per Day. Manually entering a lunch deduction will prevent an automatic lunch deduction from occurring that day.

Web Punch Time Clock Settings

The TotalPass B600 provides licenses for 15 employees to punch In/Out using Web Punch. Additional licenses may be purchased. For additional information on this option, refer to "Chapter 9: Sending to Payroll". TotalPass offers a few options for streamlining your payroll process.

- Creating an export file
- Emailing timecard reports
- Sending individual timecards

Biometric Settings

The TotalPass B600 is set up for employee biometric fingerprint entry. by default, but it can be customized to fit your preferences.

- To disable biometric fingerprint entry, select Disabled for the applicable employee(s).
- When biometric entry is disabled, the fingerprint template for this employee is deleted.
- Note: If an employee is having issues with fingerprint scanning, doing this will allow you to re-enroll the employee's finger again with a new scan.
- Select Enabled to require that employee to clock In with a finger scan.
- If the employee is not yet enrolled at the clock(s), they will be prompted to enroll after entering their custom PIN.
- In the event of a failed fingerprint scan, the time clock was designed so that it does not disrupt the process of an employee clocking in or out.
- You can also still ensure identify verification by setting up the clock to automatically take the employee's picture if a fingerprint scan is rejected by enabling **Photo Verification.** When this occurs, the employee's photo is taken, the supervisor(s) will receive an alert of the activity, and the punch is flagged on the report for approval. The employee will not be notified of the failed finger scan.
- After Number of Attempts allows you to customize when the photo should be taken – after 1, 2, or 3 failed biometric finger scans.

- Use Global Rule applies the setting selected under Settings | Biometric Preferences for that employee.
- Disabling this option will prevent the employee from punching in without having their fingerprint verified by the time clock.

For instructions on setting up and using biometric fingerprint entry for your employees, refer to "Chapter 5: Using Biometric Fingerprint Entry".

Accrual Settings

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.

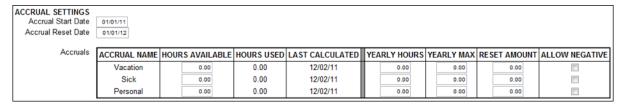
Non-Work Hours and Benefit Time (Vacation, Sick, Personal)

The Benefit Tracking and Accruals feature 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 maximum 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.



- The Accrual Start Date allows you to set the date when the employee is eligible to begin accruing the benefit.
- If your benefits renew/reset each year, enter the date when this occurs in the **Accrual Reset Date** field.
- If this is your first time setting up accruals and your employee currently has **Hours Available** or a benefit time balance, enter that balance here.
- Additional hours will be automatically accrued each day per the value set under **Yearly Hours.** As the employee uses the accrued benefit, the hours are automatically subtracted.
- The total hours that the employee has used since the Accrue Reset date can be found in Hours Used.
- The **Last Calculation** displays the date when the benefit accrual balance was last calculated.
- Yearly Hours should be set to the total benefit hours the employee accrues in one year.

The **Yearly Max** is the maximum number of benefit hours allowed to accumulate for the benefit each year. 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 (the cap). If your company employs a "use it or lose it" policy, you should post the annual amount.

- The **Reset Amount** is the number of hours an employee receives at the beginning of each new accrual year. Most companies would leave this field set to zero.
- If your company allows the employee to borrow benefit hours not yet accrued, check the **Allow Negative** box.

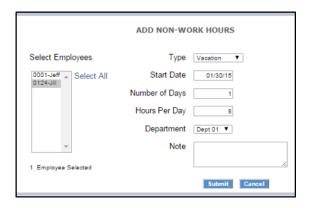
Using Accrued Benefit Hours (Vacation, Sick, Personal)

Follow the instructions below to use accrued benefit hours for the employee.

- Select Add Non-Work from Timecard or other report.
- Select the employee(s) from the **Select Employees** list.
- Select the applicable punch from the **Type** drop-down menu.

The available punch types are:

- o **NonWorked** used for applying benefit hours other than the predefined categories below.
- o Holiday
- o Vacation
- o Sick
- o Personal
- Click in the **Start Date** field and use the calendar to select the non-worked starting date.
- Type the number of consecutive non-worked days to assign for the selected employee(s) in the Number of Days field.
- Type the number of hours to assign to the selected employee(s) each day 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.



If the employee does not have enough accrued time, an error page will appear.

Delete Employee's Punches

Delete All Punches for this 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**.
- 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.

Chapter 5: Using Biometric Fingerprint Entry

Biometric fingerprint entry can help prevent "buddy punching" and allows employees to punch in and Out using their fingerprint.

- ✓ How to Clock in and Out with a Biometric Fingerprint Entry, Proximity Badge, PIN, or Web Punch
- ✓ How to enroll employee finger prints using self-enroll
- ✓ How to enable and disable punch Photo Verification

Time Clock Keypad Functions



- 1. Clock Display
- 2. Clear Returns user to the previous menu option.
- 3. ∧or ∨ Used to scroll up or down through menu options.
- **4. Enter** Selects and saves menu options.
- 5. Supervisor Mode Allows supervisor to access advanced time clock terminal options.
- **6. Info** Displays daily and weekly hourly totals for the employee.
- 7. Break/Dept. Transfer Used by the employee to transfer into a Department or Paid Break.
- 8. Fingerprint Reader Used by the employee to punch in or out with biometric verification.
- 9. Built-in RFID Card Reader
- 10. In/Out Used by the employee to punch IN or OUT.
- **11. Camera** Used for Photo Verify, when enabled, takes a picture of the employee and emails a notification to the supervisor(s) after 1, 2, or 3 finger scan attempts.

Enrolling Employees Fingerprints Using Self Enroll

Enrolling employees' fingerprints for biometric entry is simple and fast with the TotalPass self-enroll option. Employees assigned to biometric entry must have their fingerprints enrolled in the system to begin clocking In and Out.

Download and print out a copy of our **Quick Reference Sheet and post it near the** time clock to help your employees set up biometric fingerprint entry.

Follow the instructions below to enroll employees.

Note:

Some TotalPass users print a copy of the Employee List and post it next to the time clock. Employees can refer to this list for their PIN when enrolling their fingerprint.

In the software application, open the Employee List. Provide each employee with an assigned PIN number.

- Enter the assigned PIN/Badge number on the time clock terminal. The employee name displays on the time clock. The terminal prompts the employee to scan their finger.
- Place and center finger on the scanner. The scanner will light up and, when prompted, remove finger from the scanner.
- If the scanner is unable to get a good image of the fingerprint, a prompt to enter the assigned PIN/Badge number will display.
- If the scan fails and the clock is unable to get a good image of the fingerprint, a prompt to enter the assigned PIN/Badge number again displays.
- When the reader has taken three (3) good images of the fingerprint, the message enrollment successful will display. The employee is now able to clock in and out.

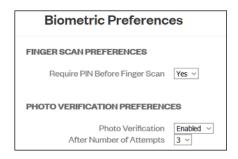
Biometric Settings

Biometric Settings by Employee

Enabling and disabling biometric entry requirements and customizing photo verification settings for an employee can be done on the Edit an Employee page. Refer to "Biometric Settings" for instructions on how to do this.

System-wide Biometric Preferences

Customize your system-wide biometric preferences by going to **Settings | Biometric Preferences.**



Note:

Failed Biometric Punches are automatically approved by the system, and all associated photos are deleted one week after the pay period end date.

Finger Scan Preferences

To enable photo verification in the event of a failed fingerprint scan, the employee must enter their PIN before scanning their finger.

To require a PIN entry before scanning, select Yes from the Require PIN Before Finger Scan drop-down menu.

Photo Verification Preferences

Since biometric identification can sometimes be affected by dirty, worn, or light fingerprints, the TotalPass B600 provides Punch Photo Verification as a backup option.

Note:

When the photo is taken on a failed finger scan, the employee can punch In/Out. They are not notified of the failed finger scan or of their photo being taken.

- Enable **Photo Verification** to have the time clock automatically take the employee's picture, if the fingerprint scan is rejected after a select number of times. The employee's photo is taken, the supervisor(s) receives and alert of the activity, and the punch is flagged on the report for supervisor approval. The employee can still punch in without having their fingerprint verified by the time clock.
- **After Number of Attempts** allows you to customize when the photo should be taken after 1, 2, or 3 failed biometric finger scans.

Chapter 6: Clocking In and Out

- ✓ How to Clock in and Out with a Biometric Fingerprint Entry, Proximity Badge, PIN, or Web Punch
- ✓ Transferring to break or to a different department
- ✓ Entering Tips and Job numbers

Punching In and Out

The employee procedure to punch In and Out at the time clock may vary depending on the entry method selected. Refer to "Chapter 4: Setting Up Your Employees" for additional information.

Biometric Finger Scan Entry

Tips for Best Finger Scan Quality

- Employees with fine fingerprints (light ridges) may have a more difficult time with finger scan acceptance. Ensure that the finger is clean and dry.
- Very dry fingers may not produce a high-quality scan. Applying hand lotion makes the fingerprint ridges more visible and increases the quality of the scan.
- Use gentle pressure on the sensor when scanning the finger.
- If the finger scan is continually rejected when attempting to punch In and Out, try enrolling the employee's finger again. If the employee has fine fingerprints (light ridges), try scanning the thumb or another finger with the most visible ridges.

Identify Mode

Identify Mode allows the employee to scan their finger for clocking In/Out without entering a PIN first.

- Scan the enrolled employee finger. The employee name displays on the time clock. Under the display name, IN or OUT is flashing
- Press the IN or OUT key as appropriate for the punch. When the punch is accepted, a message displays confirming the punch.
- After an employee punches out, total hours worked for the shift displays on the time clock. Additional hours information can be viewed by pressing the UP or DOWN key.
- If the fingerprint scan is rejected, tips for improving the quality of the scan will display on the clock.

Verify Mode (with Photo Verify Option)

- Enter the assigned PIN/Badge number. The employee name will display and a prompt to scan their finger.
- After the employee successfully scans their finger, In or Out will be flashing.
- Press the IN or OUT key as appropriate for the punch. When the punch is accepted, a message displays confirming the punch.
- After an employee punches out, total hours worked for the shift displays on the time clock.
 Additional hours information can be viewed by pressing the UP or DOWN key.

Proximity Badge Entry

For instructions on assigning and clocking In/Out using a proximity badge, refer to "Chapter 10: Alternate Employee Entry Options".

Web Punch Entry

For instructions on assigning and using Web Punch licenses, refer to "Chapter 10: Alternate Employee Entry Options".

Tracking Paid Breaks

The TotalPass B600 allows you to track and manage paid breaks.

Note:

This option must be activated for each individual employee as it applies. Refer to Chapter 3: Setting Up Your Employees.

To track time spent on paid break, the employee must be assigned to the break department and must transfer into the break department.

To transfer into the break department, the employee must already be punched In.

- Enter the assigned PIN/badge number or wave the proximity badge in front of the number pad.
- Instead of pressing Out, press the Break/Department Transfer key on the time clock.
- "Going To... Break" will display. To clock into break, press **Enter**. This punches the employee out of the work department and into the break department.

To transfer out of the break department and back to work:

- Enter the assigned PIN/badge number or wave the proximity badge in front of the number pad.
- Instead of pressing In or Out, press the Break/Department Transfer key on the time clock.
- "Going To... Break" will display. To clock into break, press Enter. This punches the
 employee out of the work department and into the break department..

Department Change (Punch In and Out Transfer)

The TotalPass B600 can track time spent by an employee in a specific department. Employees can be assigned to multiple departments and will be prompted to select their department when punching In.

Once the employee has been assigned to their departments, follow the instructions below for transferring to the department.

• Scan finger then press In.

Note: If biometric is disabled for the employee enter PIN/badge number or wave the proximity badge in front of the number pad.

- Use the **Up** or **Down** key to select the applicable department.
- Press Enter.
- By pressing the Break/Department Transfer key, the employee can quickly transfer from one department to another.
- If an employee needs to punch out of one department and into another department, enter the assigned PIN/badge number at the time clock or wave the proximity badge

in front of the keypad, then press the Break/Department Transfer key.

• Use the **Up or Down** keys to select the desired department. Press **Enter** to punch into that department. The employee is automatically punched out of the previous department.

Entering Tips, Job Numbers or Piece Counts

The TotalPass B600 allows an employee to enter additional data at the clock (Employee Inputs) on either an In or Out punch. Employee Inputs are used to track employee tips, piece counts, or job numbers. This optional data will be recorded on the Timecard Report.

Follow the instructions below to collect employee input data on the In punch.

Note:

This option must be activated for each individual employee as it applies. Refer to Chapter 3: Setting Up Your Employees.

Collecting Employee Inputs on an In Punch

Scan finger then press In.

Note: If biometric is disabled for the employee enter PIN/badge number or wave the proximity badge in front of the number pad.

- If multiple departments are assigned, use the Up or Down key to select the applicable department.
- Press Enter.
- When prompted, enter the **Employee Input** value.
- Press Enter.

Collecting Employee Inputs on an Out Punch

Scan finger then press In.

Note: If biometric is disabled for the employee enter PIN/badge number or wave the proximity badge in front of the number pad.

- Press Enter.
- When prompted, enter the **Employee Input** value.
- Press Enter

Chapter 7: Department and Supervisors

- √ Track employees' time by department
- ✓ Assign an employee to a supervisor with custom supervisor permissions

Departments

The TotalPass B600 can track and report labor on a departmental level. Hours worked and labor costs are included in these reports. The system supports up to 99 different departments and each employee can be assigned to one, multiple, or all 99 departments.

Customize Your Department

To view the departments list, select **Lists | Departments**. Click an available department in the Department column to open the **Edit A Department screen.**

• Type a name for the department in the **Department Name** field.

Note:

Department with assigned employees cannot be made inactive. Click on the Employee Count value to see a list of employees assigned to the department.

All departments default to Active status. Uncheck the **Active** checkbox to make them inactive.

- Enter any notes to be associated with this department in the **Note** field.
- If exporting department hours to a payroll program, enter the Department Code provided by your payroll provider.
- Click Submit.

Note:

The QuickBooks Plug-in and the ADP Payroll Export utility do not offer these features.

Customize Revision Zones

You can access the Revision Zones by going to **Lists | Departments** and clicking on the individual department to add revision zones to.

- In the In **Revision Start Time** field, enter a time in hh:mm:a/p format. For example, 7:30a.
- In the In **Revision End Time** field, enter a time in hh:mm:a/p format. For example, 8:00a.

Example: In the example above, if an employee clocks In between 7:30 a.m. and 8:00 a.m., the shift start time rounds to 8:00 a.m.

- In the Out Revision Start Time field, enter a time in hh:mm:a/p format. For example, 4:30p.
- In the Out Revision End Time field, enter a time in hh:mm:a/p format. For example, 5:00p.

Making a change to the revision zones will prompt the time clock to restart. This will make the time clock unavailable until the clock fully reboots.

Example: If an employee clocks Out between the Out Revision Start and End Time, the shift end time rounds to the Out Revision Start Time, which is 4:30 p.m.

Assigning/Changing Departments

Each employee is automatically assigned to the first department in the list and must be assigned to at least one department. Follow the instructions below to assign a department(s) to an employee.



- Select Lists | Employee.
- Select an employee. On the Edit an Employee screen, locate the Departments table.
- Select the department to assign to the employee, from the drop-down menu.
- If you are assigning more than one department, enter the order that they will display when the employee punches in.
- To track Employee Inputs in one or more departments, click the check-box to enable this feature.
- The **Add Department** option automatically populates with additional departments.
- Click **Submit** at the bottom of the screen to save your changes.

Removing a Department

Note:

If an employee punches for a break, the break department will be at the top of the list and does not have an order number.

To remove a department, select **Remove Department** from the drop-down menu in place of an existing department.

Supervisors

Note:

Employees who are assigned the Automatic Entry Method are not able to select departments.

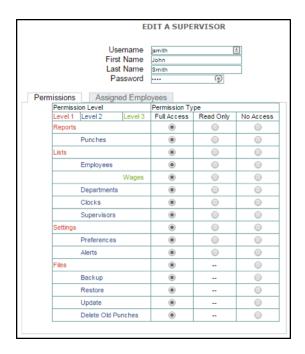
The TotalPass B600 allows each supervisor to have their own time clock login. Supervisors can be assigned unique permissions settings to access different areas of the system and specific employees.

Setting Supervisor Permissions

Follow the instructions below to set up your supervisors.

• Select Lists | Supervisors

- Click Add Supervisor
- Type the supervisor's Username, Supervisor's First and Last Name, and Password in the applicable fields.
- Designate the access Permission Level and Permission Type using the radio buttons.
- Click **No Access** to make the area off limits for the supervisor.
- Click Full Access to give the supervisor permission to create, edit, and view transactions in that area.
- Click Read Only to allow the user to only view the data in that area. Edits are not allowed.
- Once complete, click Submit to save user settings.



Once you click Submit, you cannot change the username. To change the username, you must create a new supervisor account and delete the old one.

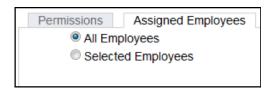
After setting up a new supervisor account, it is recommended that you assign employees to the supervisor. If you chose not to customize the supervisors' assigned employees, they will have access to all employees by default.

Assigning Employees to a Supervisor

Supervisors can be given restricted access to view and edit data for only those employees assigned directly to them. They will also receive Home page and email alerts for only their assigned employees.

- Select Lists | Supervisors.
- Select the appropriate supervisor from the list.
- From the Edit a Supervisor page, select Assigned Employees.
- Select one of the available options:
- Select All Employees to assign all employees to the supervisor.
- Select Selected Employees to assign specific employees to the supervisor. Selecting this will display additional options allowing you to assign individual employees to the supervisor.
- The Unassigned Employees column displays a list of available employees that are not currently assigned to the supervisor.
- The Assigned Employees column displays a list of employees that have been assigned to the supervisor.
- Select an employee(s) in the Unassigned Employees column, click > to move them to the Assigned Employees column.
- Select an employee(s) in the Assigned Employees column, click < to move them to the Unassigned Employees column.





- Click **Select All** to select all employees in the column.
- Click Select None to deselect the employees in a column.
- Use the Filter by Department drop-down menu to filter the Unassigned Employees column by department assignment.
- Select View All Assigned Employees to generate a report of employees that have been assigned to the supervisor.
- Click **Submit** to save your settings.

Supervisor Login

To login to the time clock application as a new user, follow the instructions below.

- At the employee time clock **Login** page, have the new user enter their username and password in the applicable fields.
- Click Submit to log in to the time clock software.
- If a supervisor attempts to access an unauthorized page or tries to edit a page with **Read Only** access, an **Access Denied** error message displays.

Chapter 8: Generating Reports

- ✓ Overview of the reporting options
- ✓ Adding and editing punches
- ✓ Entering Holiday and Non-Work time

Report Overview

The reports generated are designed to be easy to read and edit. The TotalPass B600 comes with the following standard reports:

- Attendance Report displays all employee punch data sorted by date.
- Accrual Summary Report displays all employee accruals.
- Timecards Report displays punches and hours sorted by employee.
- Individual Employeee Timecard displays one individual employee timecard at a time.
- Department Report shows punches and hours sorted by Department.
- Timecards by Department lists employee punches and hours sorted first by employee, then by department.
- **Punch Verification** report shows punches associated with failed biometric fingerprint scan, when the employee's picture was captured, and if the punch is pending supervisor approval.
- Create Report allows you to customize the report based on employee, date, time, departments, and custom field values assigned to an employee.

Adding a Punch

From a report screen, click Add Punch.



Perform the following when adding a punch:

- Confirm or select the correct employee.
- Select the punch type 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 in the TIME
 OUT column, change the punch type from Automatic
 to Out, to add a lunch or hours adjustment.
- Click in the **Date** field to use the calendar to select the punch date.
- Type the time for the punch in the **Time** field. The application assumes a.m. unless otherwise specified.
- For In punches, select the department from the **Department** drop-down menu.
- 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.
- Type any applicable notes in the **Note** field. You have an additional option to print notes that coincide with each punch. This feature is often used to track an event that happened with that punch. A plus sign (+) accompanies that punch.



Click Submit to save your changes.

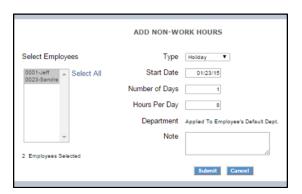
Adding Non-Work Hours (Holiday and Non-Worked)

A Non Work punch is when the employee was not actually working, but using benefit time like holiday or jury duty.

NonWorked hours can be assigned to one or more employees across one or more days.

Perform the following when adding a non-work punch:

- Select **Add Non-Work** from the 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 off site or other benefit time.
 - Holiday
- Click in the Start Date field and use the calendar to select the date when the non-work hours should begin.
- Type the number of days to assign to the employee(s) in the Number of Days field.
- Type the number of hours to assign to the selected employee(s), for each day, in the Hours Per Day field.
- If you have selected only one employee, select the department to assign the non-work hours in the **Department** drop-down menu. If you have selected more than one employee, the Department field will auto-populate and hours will be assigned to each employee's default department.
- Type any applicable notes in the **Note** field. You have an additional option to print notes that coincide with each punch. You can use a NOTE to describe the type of non-worked benefit hours used. A plus sign (+) accompanies that punch. Click (+) to make the note visible.
- 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.
 - Olick Submit to save your changes.
 - Click Cancel to cancel the transaction.



o Click **Back** to go back to the Add Non-Work page and revise the data.

Editing a Punch

Modifying or editing a punch on the reports is easy.

- Click on the In or Out time you want to edit. Each punch entry on the report
 is a link that will take you to the Edit a Punch window.
- 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 and 'E' next to the punch. Refer to "Setting Your Punch Preferences" for instructions on disabling this option.



Using Batch Edits

Batch edits is an option in <u>"Setting Your Punch Preferences"</u>. To use Batch Edits with pop-up windows, follow the instructions below.

- Before editing punches, print the report for the pay period. Review which punches you need to edit.
- In the **Report** screen, click the applicable punch you want to edit or add.
- The **Edit a Punch** screen displays in a separate pop-up window.
- Make the desired punch edit, then click Submit.
- After editing all the punches, click **Refresh** in the upper right of the report screen. The edited data displays on the report.

Viewing Additional Reporting Details

Customizing your reports and viewing additional details on a report is intuitive and easy.

The blue links in the reports are Web links that allow you to customize or view details of your data. Some reports have additional detail options.



- 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 upper left of the Report screen.



- Olick the appropriate predefined timeframe link or use the From and Thru
 date fields to enter a custom timeframe to run the report.
- o Click Submit after entering custom dates.

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.

o **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.

EMPLOYEE

11/29/18

VAC

Totals: (Format: Hundredths)

Punch Verification

From: 11/25/18 Thru: 12/01/18 Add Punch Add Non-Work

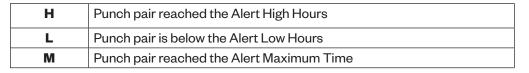
(a) Thu 11:27a

HOL TOTAL

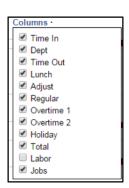
Dept 01

PER

- Select **Columns** to customize which columns display on the report.
- o The report font size will automatically adjust to fit the page.
- The **Labor** option will display the calculated labor cost (pay), entered in the wage field in the Edit an Employee screen.
- Exceptions: Click the Exception link to view punches that may require the attention of the payroll manager. Exception types and settings are found under <u>"Setting Your Alert Preferences"</u>.
 Descriptions of the exception flags are listed below.



o **Refresh**: Click Refresh to update the report with all recent punch changes.



TIME OUT

Add Punch

Punches from Failed Biometric Punch Verification

Biometric fingerprint systems can sometimes have a difficult time reading and verifying dirty, warn, or light fingerprints. **Punch Photo Verification** offers 100% verification, even if the fingerprint cannot be read by the reader. If the fingerprint scan fails, the camera will take the employee photo and the punch will be flagged with a camera icon on the reports.

For instructions on customizing Punch Verification settings, refer to "System-wide Biometric Preferences".

Failed Biometric Punches will be automatically approved by the system and all associated photos will be deleted 1 week after the pay period end date.

Accrual Summary Report

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

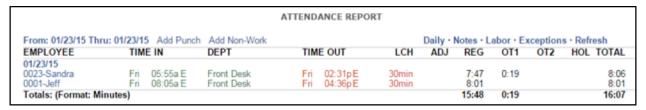
This report lists the total benefit accrual hours available and the hours used in real time, for each employee.



Using the Attendance Report

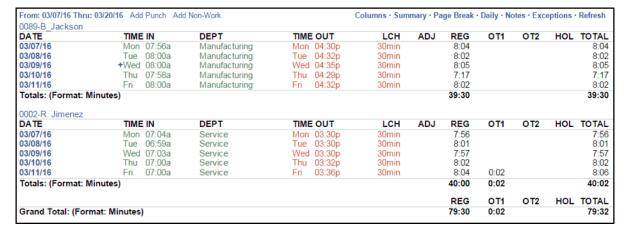
The **Attendance Report** is designed to give you a quick at-a-glance view of your employee's daily attendance. Most companies use this report to view who has clocked In or Out for the day.

To view the **Attendance Report**, go to **Reports | Attendance**, click on the date link in the upper left corner to choose the 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. To view the Timecard Report, go to **Reports | Timecards**.



To filter by employee or date, click the date link at the top of the report.

• Click **Summary** at the top of the Timecard Report to display a summary of total hours without the punch detail.

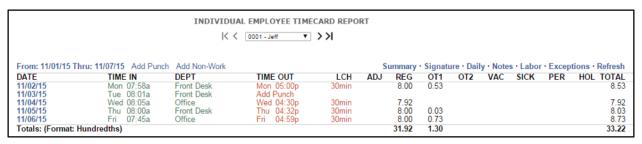
- Click **Page Break** at the top of the Timecard Report to create a page break between employee timecards. This also displays an employee signature line when you print timecards. This option is often used by companies that keep a printed record of employee time and to show employee timecard approval.
- Click Export at the top of the report to download the report in commadelimited (CSV) format. The CSV export comes in two formats.
- CSV format includes relevant punch information for importing into payroll applications or editing in Microsoft Excel.
- CSV (Extended) format includes additional/internal punch information used for integration with third party applications.



Using the Individual Timecard Report

The Individual Employee Timecard Report is used for reviewing and editing employee punches, one employee at a time.

To view the Individual Employee Timecard Report, go to Reports | Individual Empl Timecards.



- To select an individual employee's timecard, select the employee on the drop-down menu.
- Skip forward, and backward by selecting the arrows on either side of the employee name.

Using the Department Report

The Department Report is designed to give you a report with a summary of hours worked per department. To view the Department Report, hover over **Reports**, and then **click Department**.

| 023-Bill Smith | | | | | | | | | |
|------------------|------------|------------|-------|------|-------|-------|-------|------|-------|
| Server | | | | | | | | | |
| DATE | TIME IN | TIME OUT | LCH | ADJ | REG | OT1 | OT2 | HOL | TOTAL |
| 12/30/13 | Mon 04:00p | Tue 12:30a | 30min | | 8.00 | | | | 8.00 |
| 12/31/13 | Tue 04:25p | Wed 01:00a | 30min | | 8.00 | 0.08 | | | 8.08 |
| 01/01/14 | *Holiday | | | | | | | 8.00 | 8.00 |
| Totals: (Format: | | | 16.00 | 0.08 | | 8.00 | 24.08 | | |
| Host | | | | | | | | | |
| DATE | TIME IN | TIME OUT | LCH | ADJ | REG | OT1 | OT2 | HOL | TOTAL |
| 01/02/14 | Thu 04:00p | Fri 12:22a | 30min | | 7.87 | | | | 7.87 |
| 01/03/14 | Fri 03:39p | Sat 12:36a | 30min | | 8.00 | 0.45 | | | 8.45 |
| Totals: (Format: | | 15.87 | 0.45 | | | 16.32 | | | |
| 023-Bill Smith T | 31.87 | 0.53 | | 8.00 | 40.40 | | | | |

Using the Timecards by Department Report

To view the Timecards by Department report, hover your cursor over **Reports**, and then click **Timecards by Department**. This report is designed to give you a report of each employee's timecard, with hours grouped and totaled by department.

Press Ctrl to select more than one employee or department. After defining the parameters of your report, click Submit.

Create Custom Reports

TotalPass B600 offers advanced report functionality, allowing you to filter reports by employees, dates, or by departments.

From the Navigation menu, go to **Reports**, and click **Create Report** from the drop-down menu.

To create a report, perform the following.

- Select the type of report to run from the Report Type drop-down menu.
- Select the time frame for the report from the **Time Frame** drop-down menu.
- Under the Select drop-down menu you are given three options.
- All Punches is the default selection and displays all punches for the selected time frame.
- **By Time Range** allows you filter the report to show only those punches that fall between the selected time-range. This option is most often used when running reports for tardy arrival or early departures.
- Only Non-Work allows you to select only Non-Work or benefit time. In addition, you are given the option to select which Non-Work type, Holiday or Non-Worked, to display on the report.
- Select the employee(s) to view on the report from the Select Employees list, or click Select All to run a report for all employees.
- Select the department(s) to view on the report from the Select Departments list, or click **Select All** to run a report for all departments.

Generating Reports on custom Field Values - Labor Distribution

Timecard and **Timecard by Department** reports can be generated based on the custom field values assigned to an employee. This is often used for Labor Distribution reporting.

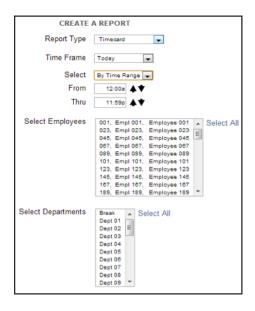
Common uses:

- Employee's assigned location
- Billing account
- Part Time / Full Time Status

A maximum of 10 custom fields can be tracked.

Here's an example to help you understand how to set up the custom fields.





We would like to run a Timecard Report based on the employee's assigned work status. We have the following 3 work statuses: Full Time, Part-Time, Contract.

Step 1: Set Up the Custom Field Title and Assignment

Create a title for the custom field. Do this under **Settings** | **Preferences** | **Custom Fields**. Be sure to assign the field to the Employee page.

In our example, we will title the field Status.

Step 2: Assign the Custom Field Value to the Employee

Go to **Lists | Employees** and find the employee(s) for which you would like to assign the custom field value. You will find the title of the custom field value under Employee Settings. Assign the custom field value for the employee, and press **Submit**.

Do this for each employee.

In our example, we will assign one of the following values to our employee; Full Time, Part Time, or Contract.

Step 3: Generate the Custom Report Using Create Report

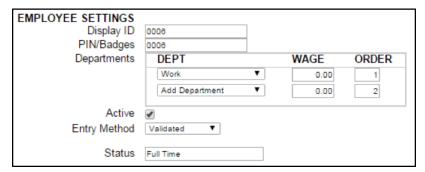
To generate reports based on the assigned custom values go to Reports | Create Report.

Note:

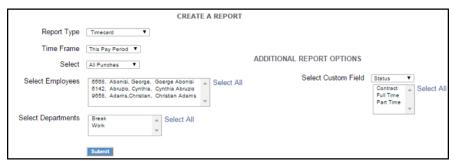
For running reports, Custom Field Value are case sensitive and must match each employee.

Select either the **Timecard** or **Timecard by Department** reports. When selecting one of these reports, Additional Report Options will appear.

· Select the Custom Field title. The unique custom values assigned to your employees will display.



 If you would like to filter the report results to one or more unique custom value, select those values and then press **Submit**.



To select two or more values, hold down the Ctrl key as you make your selection.

Chapter 9: Sending to Payroll

TotalPass offers a few options for sending approved hours to your payroll system.

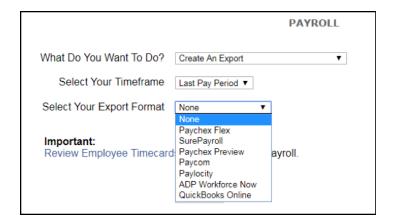
- ✓ Creating an export file
- ✓ Emailing timecards reports
- ✓ Sending individual timecards

Create Payroll Export File

At the end of the pay period, compile employee data and transmit to payroll for processing.

The Payroll report option creates a payroll export file for the following platforms:

- Paychex Flex
- Sure Payroll
- Paychex Preview
- Paycom
- Paylocity
- ADP Workforce Now
- QuickBooks Online
- QuickBooks (Pro®, Premier, Enterprise)



Note:

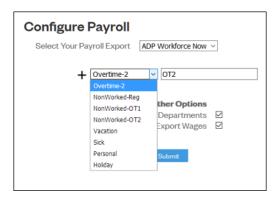
Email functionality requires that the clock is connected via Ethernet and that the SMTP Preferences be set.

The Payroll page allows you to download an export file to your PC or to email a copy of the Timecard report and the export file to one or more recipients

To create the export file, go to Payroll | Export Payroll:

- Ensure that each of your employees has an assigned Payroll ID. Employees without a Payroll ID will not be included in the payroll export file.
- Select Click here for a List of Employees without IDs.
- Customize the Payroll ID for each of the listed employees.
- Select Create An Export from the option What Do You Want to Do?
- Select the timeframe from the drop-down menu.
- Select your payroll provider in the **Select your Export Format** field.
 - Paychex Flex
 - o SurePayroll
 - Paychex Preview

- o Paycom
- o Paylocity
- o ADP Workforce Now
- QuickBooks Online
- o QuickBooks (Pro®, Premier, Enterprise)
- Press Submit.

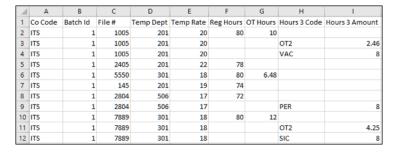


You are notified if any employees do not have an assigned Payroll ID. The message and the option to view a list of these employees' displays at the bottom of the Payroll report screen.

Paylocity Export Payroll Process

Users can use Payroll | Configure Payroll to setup the earning codes for Paylocity export.

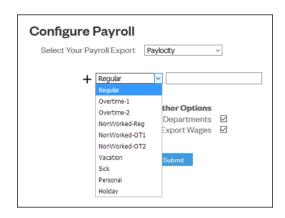
- Export file should be in a comma delimited text file
- Employee ID, DET ("E" for earning), and DETCODE (earning codes defined for the company) are the only required fields to successfully import the file
- If NonWorked-OT2 is not defined, will add the time to Regular OT2, Regular OT2 is not defined, will add time to Regular OT1
- If NonWorked-OT1 is not defined, will add time to Regular OT1



ADP Workforce Now Export Payroll Process

Users can use Payroll | Configure Payroll to setup the earning codes for ADP Workforce Now export.

- Export file should be in CSV format (comma delimited)
- Any hours not coded will be standard/Reg hours
- If OT2 is not defined, will add OT2 time to OT1
- If NonWorked-OT2 is not defined, will add the time to Regular OT2, if Regular OT2 is not defined, will add the time to Regular OT1
- If NonWorked-OT1 is not defined, will add the time to Regular OT1
- If NonWorked is not defined, will add the time to Regular
- Hours coded under the different punch types (Other than Reg and OT) will be broken out in their own row and under the Hours 3 Code column



| | Α | В | С | D | Е | F | G |
|---|-------------|-----|---------|--------------|--------|-----------|----------|
| 1 | EMPLOYEE ID | DET | DETCODE | HOURS | AMOUNT | TEMP RATE | RATECODE |
| 2 | 123 | E | REG | 80 | | 20 | |
| 3 | 123 | E | OT | 4.75 | | 30 | |
| 4 | 145 | E | REG | 77.48 | | 21 | |
| 5 | 167 | E | REG | 80 | | 18 | |
| 6 | 167 | E | OT | 6.8 | | 27 | |
| 7 | 167 | E | VAC | 8 | | 18 | |

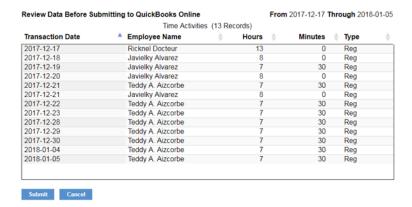
Note: ADP Workforce Now already handles Regular and OT1 hours, user do not need to set these payroll items.

QuickBooks Export Payroll Process

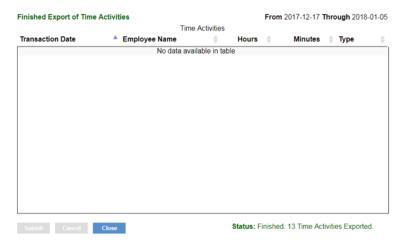
1. Users can use the Employees and Departments list boxes to filter and choose which employee hours are exported.



2. Users will be able to review the data before submitting to QuickBooks Online.



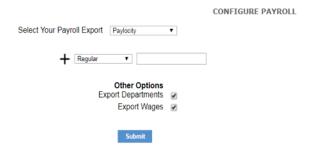
The final confirmation screen will have a total of the time activities exported.



Configuring Payroll

Navigate to Payroll | Configure Payroll

- Users will be able to configure payroll specific pay/earning codes.
- This applies to Paylocity, ADP Workforce Now, and QuickBooks Online

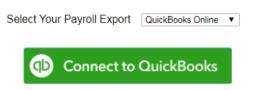


QuickBooks Online Configuration

QuickBooks configuration involves connecting to an online QuickBooks account and linking employees between QuickBooks and the time clock, or adding them from one application to the other if they don't exist yet.

1. Within the Configure Payroll screen, select the QuickBooks Online payroll export and then click on the Connect to QuickBooks button.

CONFIGURE PAYROLL



2. Select a QuickBooks employee and a time clock employee and click on the Link button to link them between the two applications.



Linked employees will be displayed at the bottom in the Linked Employees list box.



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.

- 4. Employees that don't have a matching entry in either system can simply be added by highlighting them and clicking on either Add to Clock, or Add to QuickBooks.
- 5. Linked employees can be unlinked by highlighting them and clicking Remove Link.

Chapter 10: Alternate Employee Entry Options

The TotalPass B600 offers various methods for employees to clock In/Out

- ✓ Web Punch Entry
- √ Proximity badge
- ✓ Keypad with Custom PIN
- ✓ Biometric Fingerprint

Web Punch Entry

Web Punch is a touch-free entry option that is ideal for tracking time for employees who work remotely or at varying job locations. It can also be used a solution for employers who want to provide a touch-free punch option for onsite employees.

Web Punch allows you to capture your employees' time anytime, anywhere using a web browser from a device on the network (LAN, WAN) or Internet. The TotalPass B600 comes with 15 employee Web Punch licenses.

For employees or supervisors to access the time clock application remotely via the Internet, additional set up is required. Refer to "Chapter 17: Configure for Remote Access" for more details.

Web Punch also offers advanced functionality, including IP location restrictions and GPS tracking, to help better manage your employees' punches.

Setting Up Your Employees - Web Punch

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

- Select Lists | Employee List.
- Select an employee. The **Edit an Employee** screen displays.
- Check the Assign to Web Punch checkbox to enable Web Punch for this employee.
- Type a password for the employee to use when punching In/Out on the Web browser in the **Web Punch Password** field.
- Type the IP address that this employee may punch from in the **Authorized IP Addess(es)** field. Leave this field blank to allow the employee to punch from any IP address.
- Check the Allow Punch from Unauthorized IP checkbox to allow the employee to punch from an unauthorized IP address, but have those punches flagged on the reports for review.
- Check the Use Global Authorized IP Address checkbox to allow an authorized IP address for all employees.
- Click **Submit** to save your settings. Repeat the steps above to assign additional employees to Web Punch entry.

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.

Punching In/Out Using Web Punch Entry

Employees assigned to the Web Punch Entry can punch





In/Out anytime, anywhere, using a web browser interface.

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

- Open the employee time clock **Login** page.
- Type the assigned PIN/badge number in the **Username/PIN** field.
- Type the employee's assigned Web Punch password in the **Password** field.
- · Click Submit. The employee Web Punch screen displays.
- Select the appropriate option (Punch In, Punch Out, or Department Change) to complete your punch.
- If the employee can change departments, select the department.
- Click Confirm. 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.

Web Punch IP Address
Web Punch Browser
GPS Location
I attitude:

GPS Location Latitude: 45.822625 Longitude: -122.963483

Accuracy: 541 feet (165.0 meters) Altitude: 705 feet (214.8 meters) WEB PUNCH

Hello Jill Abercrombie, you last punched out on 01/27/15 11:00a.

Current Time: Tue 2:32 PM

What do you want to do?

Punch In

Log Out

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.

Clocking In/Out from GPS Enabled - Location Tracking

If an employee clocks In/Out using a web browser, additional punch information is available.

GPS Location

By using Google Maps integration and clicking on the GPS link, you can view the location of the employee at the time of the punch.

- 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:** Indicates how fast the employee was traveling when they created the punch.

IP address Restriction

Using IP Address Restriction, you can restrict employees from punching from unauthorized locations. This information can be flagged and tracked on your reports.

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 can use. To set this, follow the instructions below.

- Select Settings | Preferences and click the Device tab.
- 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 on.
- The authorized IP address can be listed in the following ways:
 - o Any IP Address Leave the field blank to allow employees to punch in/out from any IP address.
 - o **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, 192.168.3.78

o **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

Click Submit to save your changes.

Note:

If an employee is not restricted 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 Address by Employee

The employee's Authorized IP Address(es) field assigns the IP address that an employee is authorized to punch in/out.

To set the authorized IP address(es), perform the following instructions.

- Go to the Employee List and select the employee.
- In the **Authorized IP Address(es)** field, enter the IP Address(es) of the computer (or another web-enabled device) that the employee is authorized to punch In/Out.
- 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, 192.168.3.78

• 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

• 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.

Click Submit to save your changes.

Running Reports with Web Punch

On your reports, web 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.

Using Proximity Badges

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; no-touch entry, minimizing "buddy punching," quicker clock In, and eliminating the need to memorize a PIN.

Proximity Badges can be purchased in packs of 10 or 25. 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 as 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.

- Enter 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".
- Scroll through the options using Up or Down until you find the option Assign Badges and press Enter.
- The time clock display will prompt Enter ID Number. Use the keypad to enter the ID number (PIN) of the employee and press Enter.
- 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, enter the PIN of the new employee, 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 entering a PIN before clocking In or Out.

- Select **Settings | Preferences**, then click the **Device** tab.
- Under **Device Preferences**, check the **Lock Keypad** checkbox and click Submit. 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 <u>"Punching In and Out"</u>.

Chapter 11: Maintaining Your Time Clock

Learn to maintain your time clock for optimal performance.

- ✓ Setting up scheduled automatic backups
- ✓ Backing up and restoring data to your time clock
- ✓ Removing punches from your system
- ✓ Resetting the time clock passwords

Setting up Scheduled Automatic Backups

Backups of your time clock data can be automatically emailed to one or more recipients on a daily, weekly, or monthly basis. Scheduled automatic backups help ensure that your data is secured on a regular basis and can be restored if necessary.

To set up automatic backups, refer to "Email/Backup Preferences".

Once that has been done, go to **Files | Create Backup** and try sending a test backup email by clicking **Submit** under **Email Backup Now.**

If the backup is successfully sent, a notification will display. If you receive an error message, make all necessary changes to your SMTP preferences to resolve the errors and try sending the backup again.

Creating a Data Backup

It is important to make a backup (copy) of your employee time clock data periodically. Backups help ensure that your data is secured on a regular basis and can be restored if necessary. We recommend creating a backup of your time clock data each pay period and prior to performing any updates to your time clock.

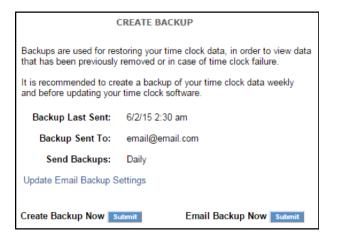
Data Backup from the Software Interface

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

- To create a backup file, select Files | Create Backup.
- Click Submit to create a backup in the Save to Backup File screen. Click Save.
- A file name is automatically assigned for you. The file name includes the current date for easy reference.

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.
- Browse to the directory where you would like to save the file.
- Click Save.
- 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 saving your backup to a USB flash drive – a data storage device with an integrated **USB** interface. Follow the directions below to create a backup of your time clock data using a USB flash drive.

- Plug the USB flash drive into the bottom of the time clock.
- Enter Supervisor Mode:
- Press on the time clock.
- Enter your security code the default security code is "00 00 00".
- Press **Up** or **Down** until the DOWNLOAD BACKUP option displays.
- Press ENTER.

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

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.

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.

Restore a Time Clock Data Backup from the Software Interface

- To restore a backup file, select Files | Restore Backup.
- Type your password in the Current Password field.
- Click **Browse** and navigate to the location of your backup file.
- Select the file in the Choose File window and click Open.
- Click **Submit** in the Restore Backup File screen to restore the backup file. 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. The employee time clock will display a Please Wait and then a Performing Restore message.
- After the restore is complete, you will be required to log back into the time clock to view the backup information.

The backup is a proprietary file that cannot be used or opened using any other program.

Restore a Time Clock Data Backup from a USB Flash Drive

Restoring a backup of your data is easy using your USB flash drive. Be sure to save a current backup file before restoring another backup. Follow the directions below to restore a backup from a USB drive.

- Copy the backup file data to the root of the USB flash drive.
- Rename the file to backup.db and ensure the name is all in lower case letters.
- Connect the storage device to the bottom of the employee time clock.
- 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".
- Press Up or Down until RESTORE BACKUP displays and press ENTER.
- If the file is found, Restoring Data, then Performing Restore displays. The time clock will reboot.
- After the time clock reboots, log back into the employee time clock software to view your historical data.

Removing Data from Your Time Clock

Before removing punch data from your clock, be sure to save a backup of your existing data.

- Go to Files | Delete Old Punches.
- Select a date using the calendar in the **Delete Punches Prior** to field.
- Click Submit to remove all punches up to the date specified.
- Click Cancel to go back to the time clock Home page.

Note:

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

Updating Your Time Clock

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

Before performing updates to your employee time clock, we recommend that you save a backup of your data. Refer to the Data Backup from the Software Interface.

Updating Your Time Clock from the Software Interface

Follow the instructions below to update your TotalPass B600 time clock.

Download the time clock update file from our website to your desktop. http://www.icontime.com/totalpassupdate

- From the Navigation menu, go to Files | System Update.
- In the System Update screen, type your time clock password in the Current Password field.
- Click **Browse** to locate and select the **update.bin** file in the File Upload screen.
- Click Open in the File Upload screen.
- Click Submit in the System Update screen.
- A "backup your data" pop-up window displays. 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.
- When rebooting is complete, click Home to log back into your time clock.

Updating Your Time Clock Using a USB Flash Drive

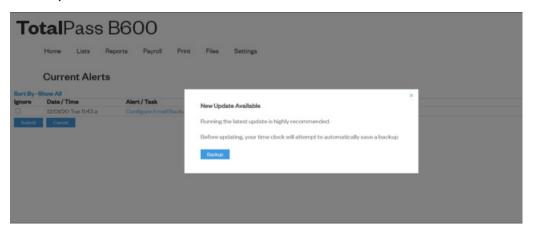
Updating your time clock is even faster if you use a USB flash drive.

- Download the time clock update file from our website to the root directory on your storage device. http://www.icontime.com/totalpassupdate
- 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.
- When the reboot is complete, log back into your time clock.

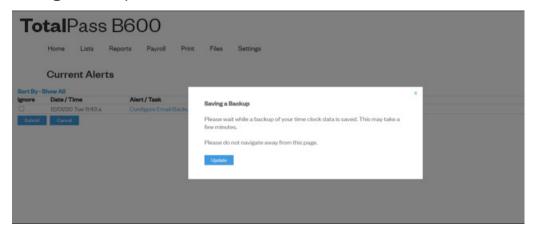
Auto-Update

Clock Admins and supervisors with System Update permissions will receive a **New Update Available** notification on the homepage with a recommendation to backup. They will be able to update right from the clock once a local backup file has been created.

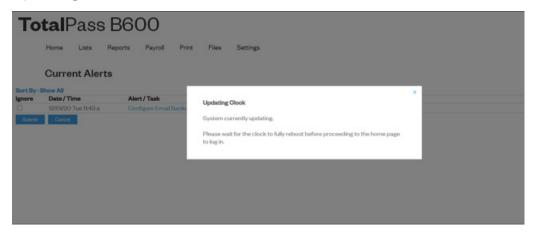
New Update Alert



Saving a Backup



Updating Clock



Resetting Your Time Clock Passwords

Changing Your Time Clock Software Interface Password

You can change the password by going to

Settings | Change Password from the Setting menu.

- Enter your current password in the Current Password field.
- Type your new password in the New Password field.
- Type your new password again in the Confirm New Password field.
- Click Submit.

CHANGE PASSWORD Current Password New Password Confirm New Password Submit

Resetting the Software Interface Password

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

Resetting the Supervisor Mode Security Code

The Supervisor Mode security code is set from the software interface. The default supervisor code is **00 00 00**. It is recommended you change the default code to a new code using the steps below:



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

Chapter 12: Time Clock Terminal Supervisor Mode

Advanced Supervisor Mode Options

- ✓ Customize Network Settings
- ✓ Reset Software Admin Password

Log Into Supervisor Mode

- Enter Supervisor Mode at your employee time clock terminal.
 - o Press on the time clock terminal.
 - o Enter your security code the default security code is "00 00 00".
- Scroll through the options using Up or Down.
- Press **Enter**, when you find the option you would like to view.
- To exit Supervisor Mode, press Clear.

Parent Clock Supervisor Mode Settings

View IP Address

Look up the IP address assigned to the clock. Also, allows for assigning a static IP address, subnet mask, gateway, and DNS.

Network Settings

LAN Settings

Set IP Address

Look up the Ethernet IP address assigned to the clock. Also, allows for assigning a static IP address, subnet mask, gateway, and DNS.

- To assign a static IP address, follow the instructions under "Assign a Static IP Address to the Time Clock".
- To erase all network settings and revert to DHCP so that the router will assign the IP address, set the IP address to 000.000.000.

Wi-fi Settings

Set IP Address

Look up the Ethernet IP address assigned to the clock. Also, allows for assigning a static IP address, subnet mask, gateway, and DNS.

To assign a static IP address, follow the instructions under "Assign a Static IP Address to the Time Clock".

• To erase all network settings and revert to DHCP so that the router will assign the IP address, set the IP address to **000.000.000.000**.

View Networks

Allows you to view wireless networks in range, connect to a wireless network, or switch to a different wireless network. Refer to the "Wi-fi Settings" section for instructions on connecting wirelessly.

WPS Setup

Allows you to connect to a wireless network using WPS. Refer to "Chapter 13: Connecting to the Clock" for instructions on using WPS connection.

Assign Badges

This option is used when assigning a proximity badge to an employee. Refer to "Assigning Proximity Badges to an employee".

Set Date/Time

- From Supervisor Mode, scroll through the options using Up or Down until you find the option Set Date/Time and press Enter.
- 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.
- 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.
- 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.

View Serial

Shows the unique serial number assigned to the individual time clock terminal. Refer to page [INSERT PAGE NUMBER]. The serial number is used to activate your 30-day free support trial, to verify warranty status, and to purchase software upgrades.

View Version

The version number refers to the software version currently installed on your time clock. Refer to instructions on <u>Updating Your Time Clock</u> and ensure that your time clock is running the latest version.

Download Backup

This option is used to back up your time clock data. Refer to "Data Backup to a USB Flash Drive".

Restore Backup

This option is used to restore data into your time clock. Refer to "Restore a Time Clock Data Backup from a USB Flash Drive".

Enable Upgrade

This option is used to unlock additional upgrade features in your time clock. Refer to "Enabling Software Upgrades".

Reset Password

If you forget your login password, this option is used to reset your password to default. Refer to "Changing Your Time Clock Software Interface Password".

Erase All Memory

Erasing all memory resets the clock back to factory default. Follow the instructions below to Erase All Memory.

- From Supervisor Mode, scroll through the options using Up or Down until
 you find the option Erase All Memory and press Enter.
- The time clock will display **Erase All Memory** IN=YES CLEAR=NO.
- Press IN to confirm and erase all the data in the clock and return it to factory defaults.

Convert to Child

This option is used when setting up a multi-clock system. Refer to "Chapter 15: Multi-Clock Configuration" for more information on multi-clock systems.

Download Log

Downloading a log file is used when you need our support team to help troubleshoot, your system.

Additional Child Clock Supervisor Mode Settings

View Parent IP

Displays the IP address of the Parent Clock.

Force Connect

Forces a connection between the Child Clock and Parent Clock. Once the connection is made, any changes on the Parent Clock are sent to the Child Clock.

Force Full Sync

Forces a connection and synchronization between the Child Clock and Parent Clock. The Child Clock downloads employee and preference data from the Parent Clock and transfers punch data to the Parent Clock.

Show Sync Status

Displays the synchronization status between the Child and Parent Clock.

Convert to Parent

Converts a Child Clock back to a Parent Clock.

Chapter 13: Connecting to the Clock

Multiple connection options to access your time clock in no time:

- ✓ Easily connect to your wireless network over Wi-Fi
- ✓ For a fast and reliable connection, use the included Ethernet cable to connect the time clock
- √ For simply access from one computer, connect using Direct Connect Ethernet or USB

Wifi Connection

TotalPass offers a few Wi-Fi connection options, for your convenience:

- · Using the Clock Interface
- Using the Software Interface
- · Using WPS, for extra fast set up

Connecting Using the Clock Interface

The first time that you turn your time clock on, if it detects a wireless network in range, it will prompt you to connect your time clock to the wireless network. To return to this option, and connect to a wireless network, follow the instructions below.

- 1. Enter **Supervisor Mode** at your employee time clock terminal.
 - o Press on the time clock.
 - o Enter your security code. The default security code is **00 00 00**.
- 2. Use the up or down arrows to scroll until you find **Network Settings**.
- 3. Press Enter.
- 4. Find Wi-Fi Settings.
- 5. Press Enter.
- 6. Use the up or down arrows to scroll until you find View Networks.
- 7. Press **Enter**. A list of available wireless networks displays.
- 8. Use the up or down arrows to scroll until you find the appropriate network, then press **Enter**.

Note:

The default mode for the password is alpha lower case. To change the mode, press the Department Transfer icon on the bottom right of the clock's keypad. To erase a character, press Clear.

9. When prompted, enter the wireless network password using the up or down arrows to find the first character of the password, then press Enter.

- 10. Repeat step 9 until all characters of the password have been entered. Connect to the Clock.
- 11. Press Enter twice to save it. When connected, a confirmation displays with the IP address.
- 12. Write down the IP address.
- 13. Open a Web browser on your PC. Type the IP address in the Web browser URL bar, press Enter.
- 14. You should be directed to the time clock Login page.

Connecting Using a WPS Button

- 1. Enter **Supervisor Mode** at your employee time clock terminal.
 - o Press on the time clock.
 - o Enter your security code. The default security code is **00 00 00**.
- 2. Use the up or down arrows to scroll until you find Network Settings.
- 3. Press Enter.
- 4. Use the up or down arrows to scroll until you find Wi-Fi Settings.
- 5. Press Enter.
- 6. Use the up or down arrows to scroll until you find WPS Setup.
- 7. Press **Enter**.
- 8. Use the up or down arrows to scroll until you find **Push**.
- 9. Press Enter. Press the WPS key on your wireless router within 2 minutes.
- 10. When connected, a confirmation displays with the IP address.
- 11. Write down the IP address.
- 12. Open a Web browser on your PC. Type in the IP address in the Web browser URL bar, press **Enter**.
- 13. You should be directed to the time clock Login page.

Connecting Using a WPS with PIN

Enable WPS PIN Connection on the Clock

- 1. Find the **WPS PIN** on the label on your router.
- 2. Enter **Supervisor Mode** at your employee time clock terminal.
 - o Press on the time clock.
 - o Enter your security code. The default security code is **00 00 00**.

- 3. Use the up or down arrows to scroll until you find **Network Settings**.
- 4. Press Enter.
- 5. Find Wi-Fi Settings, press Enter.
- 6. Find WPS Setup, press Enter.
- 7. Find **PIN**, press **Enter**.

Connect to the Wireless Network

- Use the up or down arrows to scroll until you find View Networks, press Enter.
- 2. Find your Network in the list, using the up or down arrow, press Enter.
- When prompted, enter the WPS PIN number using the keypad, press Enter.
- 4. When connected, a confirmation displays with the IP address.
- 5. Write down the IP address.
- 6. Open a Web browser on your PC. Type the IP address in the Web browser URL bar, press Enter.
- 7. You should be directed to the time clock Login page.

Connecting Using the Software Interface

To connect your time clock to the wireless network using the software interface, it must be connected to your network or computer using the Ethernet or USB cable.

- 1. Log into your time clock software interface, on either a Parent Clock or Child Clock.
- 2. Go to Settings | Network Settings. The Wi-Fi Network Settings screen displays the available wireless networks.
- 3. Click the appropriate network.
- 4. Type the password in the available field, then click **Connect**.
- 5. The network selected appears at the top of the list, with an indication the time clock is "connected" to the wireless network.

Ethernet Connection

Connect your time clock directly to your network for a fast and reliable connection wireless.

- Plug one end of the Ethernet cable, provided in the package, to an available port on your router, DSL modem or switch.
- 2. Connect the other end to the Ethernet port on your time clock.
- 3. Plug the time clock into the power. Wait for the time clock to fully boot up, it will state Enter ID Number.

If there is a wireless network in range, you'll be prompted to connect to the wireless network. Press Clear to cancel and move to the next step.

- 4. Enter **Supervisor Mode** at your employee time clock terminal.
 - o Press on the time clock.
 - o Enter your security code. The default security code is **00 00 00**.

Chapter 14: 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 time-and-a-half, double time, or other custom defined overtime rates.

Revision Zones

Round punch (shift) hours to the start and end times of a specific shift. Employees will not get paid for punching In early or Out late.

OVERTIME PREFERENCES Day OT1 After 8.00 Hours Day OT2 After Hours 0.00 Week OT1 After Hours 40.00 Week OT2 After Hours 80.00 Consecutive Day OT Consecutive Day OT On Days Consecutive Day OT1 After Hours Consecutive Day OT2 After Hours OT1 Multiplier 1.50 OT2 Multiplier 2.00

Enhanced Overtime Preferences

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

Consecutive Day OT1 On ____ Days – determines when Consecutive Day Overtime should begin to accumulate.

Example: If Consecutive Day OT On is set to 6 days, employees will receive Overtime 1 on the sixth consecutive day of work. If the Consecutive Day OT1 After setting is set to 5 hours, the first 5 hour worked on the sixth day is considered straight time and the rest of the hours will be Overtime 1 (OT1).

Consecutive Day OT2 After - refer to the previous example.

Note:

Overtime regulations are different for each state and can change. Be sure to confirm your state's labor regulations for overtime and adjust these settings accordingly.

If this entry is set to 8 hours, employees will receive Overtime 2 on the sixth 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 overtime preferences will prompt the time clock to restart. This will make the time clock unavailable until it fully reboots.

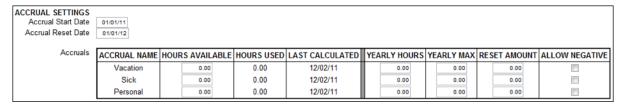
Non-Worked Hours and Benefit Time (Vacation, Sick, Personal)

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

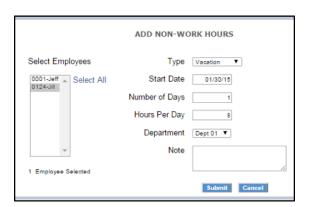
Customizing Benefit Accrual Rules

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**.



- The Accrual Start Date allows you to set the date when the employee is eligible to begin accruing the benefit.
- If your benefits renew/reset each year, enter the date when this happens in the **Accrual Reset Date** field.
 - o If this is your first time setting up accrues and your employee currently has **Hours Available** or a benefit time balance, enter that balance here.
 - Additional hours will be automatically accrued each day per the value set under **Yearly Hours**. As the employee uses the accrued benefit, the hours are automatically subtracted.
 - The total hours that the employee has used since the Accrue Reset date can be found in **Hours Used**.
- The Last Calculation displays the date when the benefit accrual balance was last calculated.
- Yearly Hours should be set to the total benefit hours the employee accrues in one year.
- The **Yearly Max** is the maximum number of benefit hours allowed to accumulate for the benefit each year. 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 (the cap). If your company employs a "use it or lose it" policy, you should post the annual amount.



Note:

This field should not be set to zero unless your benefits do not accrue. Setting this value to zero will reset the Yearly Hours to zero each day.

- The Reset Amount is the quantity of hours that an employee is to receive at the beginning of each new accrual year. Most companies would leave this field set to zero.
- If your company allows the employee to borrow benefit hours that they have not yet accrued, check the **Allow Negative** box.

Using Accrued Benefit Hours (Vacation, Sick, Personal)

Follow the instructions below to use accrued benefit hours for the employee.

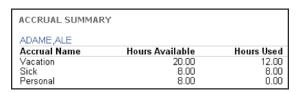
- Select **Add Non-Work** from Timecard or other report.
- Select the employee(s) from the **Select Employees** list.
- Select the applicable punch from the **Type** drop-down menu.
- The available punch types are:

- NonWorked (used for applying benefit hours other than the predefined categories below.)
- o Holiday
- o Vacation
- o Sick
- o Personal
- Click in the **Start Date** field and use the calendar to select the non-worked starting date.
- Type the number of consecutive non-worked days to assign for the selected employee(s) in the **Number of Days** field.
- Type the number of hours to assign to the selected employee(s) each day 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.
 - o Click **Submit** to save your changes.
 - o Click Cancel to cancel the transaction.
 - o Click **Back** to go back to the Add Non-Work page and revise the data.
- If the employee does not have enough accrued time, an error page will appear.

Accrual Summary Report

To generate the **Accrual Summary Report, go to the Reports icon and 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.



Revision Zones

After installing the Benefit Tracking upgrade, you can access the Revision Zones by going to **Lists | Departments** and clicking on the individual department to add revision zones.

- In the In Revision Start Time field, enter a time in hh:mm:a/p format. For example, 7:30a.
- In the In Revision End Time field, enter a time in hh:mm:a/p format. For example, 8:00a.

Example: In the example above, if an employee clocks In between 7:30 a.m. and 8:00 a.m., the shift start time rounds to 8:00 a.m.

- In the **Out Revision Start Time** field, enter a time in **hh:mm:a/p** format. For example, 4:30p.
- In the **Out Revision End Time** field, enter a time in **hh:mm:a/p** format. For example, 5:00p.

Example: If an employee clocks Out between the Out Revision Start and End Time, the shift end time rounds to the Out Revision Start Time, which is 4:30 p.m.

Note:

Making a change to the revision zones will prompt the time clock to restart. This will make the time clock unavailable until the clock fully reboots.

Chapter 15: Multi-Clock Configuration

The TotalPass B600 allows you to connect up to 32 time clocks together and access the software through a single interface from your local area network or via the Internet.

- ✓ Connecting the Child Clock(s) to the Parent Clock
- √ Additional multi-clock settings
- ✓ Updating the multi-clock system
- ✓ Clocking In/Out when the Child Clock is unable to connect to the Parent Clock

In a multiple clock system, there are two types of clocks:

- **Parent Clock:** The Parent Clock hosts the time clock software, settings, and punch data. There is only one Parent Clock in a multi-clock configuration.
- **Child Clock:** A Child Clock sends punch information to the Parent Clock, over the Network or Internet, for calculation and storage. There can be a maximum of 31 Child Clocks on a multi-clock system.

System Requirements

- Each time clock must be connected via Ethernet to the network.
- Each clock must be running the same software version as the Parent Clock.

Connecting Multiple Time Clocks

Set Up the Parent Clock

Before setup begins, designate which clock will be the Parent Clock. Follow the instructions in the <u>Quick Start Guide</u> to connect your time clock to your Network.

Note:

It is recommended that the Parent Clock be setup at the location of the person processing the timecards. For instructions on assigning a static IP address, refer to Assign a Static IP Address to the Time Clock.

Write down the serial number of the Parent Clock located on a label on the back of the time clock terminal.

Set Up the Child Clock(s)

- With the Child Clock connected to the Network, enter **Supervisor Mode**.
- Press on the time clock.
- Enter your security code. The default security code is **00 00 00**.
- Press **Up** or **Down** until the Convert to Child option displays.
- Press Enter. The time clock displays, This will remove all data, then Erase all Memory.
- Press In to convert to a Child Clock.
- Choose the method that your Child Clock will use to connect to the Parent Clock. Follow the instructions accordingly.

- Connect via Broadcast: The Child Clock will connect to the Parent Clock by searching the
 network for a clock with the Parent Clock's serial number. This is the preferred method if your
 multi-clock system will be connected on a simple local area network. The Child Clock will
 remain connected to the Parent Clock, even if the Parent Clock's IP address changes.
- **Connect via IP Address:** The Child Clock will connect to the Parent Clock by searching the network for a clock with the Parent Clock's assigned IP address. This is the preferred method if your multiclock system will be connected over a wide area network or remotely over the Internet.

Connect Your Child Clock via Broadcast

- The clock displays Locate Parent By Broadcast? Press Enter.
- The clock will then display Finding Clocks Please Wait as it scans the network for the Parent Clock.
- Once the Child Clock locates the Parent Clock(s) on the network, the clock displays the serial number
 of the Parent Clock. Select the serial number of the Parent Clock, and then press Enter.
- If there is more than one Parent Clock on the Network, press **Up** or **Down** to find the correct Parent Clock serial number, then press **Enter**.
- Skip to the Continuing Multi-Clock Setup section.

Connect Your Child Clock via IP Address

- Press Down to select By IP Address, press Enter.
- Enter the IP address of the Parent Clock, then press Enter.
- If connecting over a LAN or WAN, enter the IP address used for accessing the software interface.
- Example: 192.168.004.155
- If connecting remotely over the Internet, enter the public IP address of the Parent Clock's router, including leading zeros.
- Example: 074.168.004.155

CLOCK LIST

Enabled Child Clock Name Serial Number

B002-055-614 B002-055-614

For additional information on connecting your multi-clock system remotely over the Internet, with port-forwarding, refer to "Chapter 17: Configure for Remote Access".

Continuing Multi-Clock Setup

- Once connection is established with the Parent Clock, the Child Clock displays Child Mode, then Enter PIN.
- The symbol ' ' displays in the top right corner.
- Once the connection is established, the symbol d displays in the top right corner of the display.
 The d indicates the Child Clock is connected to the Parent Clock, but the Child
 Clock is disabled and must be enabled through the software interface.
- Log into the Parent Clock using the web browser.
- Go to Lists | Child Clocks.
- Select the Enabled check-box for the Child Clock. Press Submit.
- The Child Clock displays "#" in the top-right corner of the terminal display indicating the Child Clock is communicating with the Parent Clock.
- After a few minutes this will change to "+" indicating that the Child Clock is active and ready to use.

Child Clock Connection Symbols

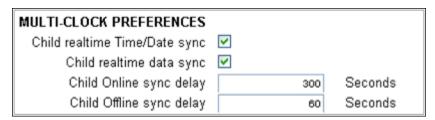
Refer to the chart below for the meaning of the symbols found on the Child Clock display.

| - | Child Clock is Unable to establish a Connection to the Parent Clock. |
|---|--|
| d | Child Clock is Connected to the Parent Clock, but Disabled. |
| + | Child Clock is Active and Ready to Use |
| # | Child Clock is Actively Communicating with the Parent Clock |
| Р | Child Clock has Lost Connection to Parent, but is Storing Punches |
| U | Child Clock is running an older software version than the Parent Clock and must be updated to communicate with the Parent Clock. |

Multi-Clock Software Settings and Optimal Configuration

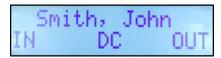
Additional Multi-Clock configuration options are available in your time clock software. It is important to pay close attention to this section because your time clock configuration can greatly affect the performance of your system.

Select Preferences | Settings, then click the Device tab.



- **Child realtime Time/Date sync** Check this option to synchronize the time and date with the Parent Clock. If your Child Clock(s) is in a different time zone than the Parent Clock, do not check this option.
- **Child realtime data sync** When this option is checked, the Child Clock will actively communicate with the Parent Clock when the employees clock In or Out, in real-time. With this option enabled, the employee can view punch and hours information when punching Out.

With this option disabled, the Child Clock will hold its punch data and send it in batches to the Parent Clock. By disabling this option, employees will be prompted to clock In or Out using non-validated punches. They will need to select whether they are punching In or Out.



If punching In or Out takes longer than preferred, disable this option by un-checking the box. The Child Clock synchronizes data at set intervals, as described below.

- **Child Online sync delay** This option allows you to set a time interval (in seconds) for how often the Child Clock checks with the Parent Clock for any changes to employee, template, settings or punch data. This option is set to a 300-second (5 minutes) interval as default.
- CHILD OFFLINE SYNC DELAY This option allows you to set a time interval (in seconds) to sync the Child Clock with the Parent Clock if the Child Clock or the Parent Clock loses connection with the network. This option is set to a 60-second interval as default.

Child Clock Status

You can find additional connection statistics on your multi-clock system at Lists | Clocks.

| Clock List | | | | | | | | |
|------------|--------------|---------------|-------------------|----------------|----------------|----------------|-------------------|--------------|
| Enabled | Clock Name | Serial Number | MAC Address | IP Address | Connected | Last Sync | Scan Success Rate | |
| | Parent Clock | B001-580-174 | 58:EE:CE:03:23:86 | Not Applicable | Not Applicable | Not Applicable | 0.00% (0/3) Reset | Reboot Clock |
| \square | T001-327-390 | T001-327-390 | 58:EE:CE:03:92:79 | 10.14.209.206 | ලා | | Not Applicable | Reboot Clock |
| | X002-397-662 | X002-397-662 | 58:EE:CE:03:E4:BE | 10.14.208.201 | හ | | Not Applicable | Reboot Clock |
| Submit | Cancel | | | | | | | |

- Clock Name allows you to customize a name for the Child Clock, making it easier to tell one a part from another.
- Serial Number
- MAC Address
- Connected displays the current Parent Clock connection status of the Child Clock.
- Last Sync shows the last date and time that the Child Clock downloaded data from the Parent Clock and sent data to the Child Clock.
- Finger Scan Statistics provides the number of total fingerprint scans done on a clock and how many of those scans were successful. Having a lower success rate may indicate that the fingerprint reader needs to be cleaned or that the fingerprint reader is having a problem reading fingerprints. Reset the finger scan statistics to reset this value back to zero.

Child Clock Connection Data

You can find additional connection statistics on your multi-clock system at Help | About Your Clock.

Child Clocks provide a list of all Child Clocks that have been connected to your Parent Clock, when the Child Clock last successfully communicated with the Parent Clock, and if the Child Clock is enabled or disabled.

Updating the Multi-Clock System

To update your Multi-Clock System, follow the instructions in Chapter 9 to update the Parent Clock. Once the Parent Clock is updated, the Child Clock(s) will automatically download the update file and update. It may take a few minutes for the Child Clock to detect that the Parent Clock has updated.

If the Child Clock detects that it is running an older version of the software than the Parent Clock, but is unable to update automatically, it will display a **U** in the top-left of the display. If this occurs, follow the instructions on "Updating Your Time Clock Using a USB Flash Drive".

Chapter 16: Software Upgrades

Available upgrades that will allow your system to expand with your business

- ✓ Increase employee and web punch entry capacity
- √ Proximity Badges

Software upgrades can be applied at any time. All software upgrade packs for your TotalPass system can be unlocked immediately by simply entering the software key provided by your reseller.

Enabling Software Upgrades

To purchase a software upgrade, provide us 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. Follow the instructions below to complete the software upgrade installation.

- Enter Supervisor Mode at your time clock terminal.
 - Press on the time clock terminal.
 - o Enter in your security code the default security code is "00 00 00".
- Scroll through the options using Up or Down until you find the option Enable Upgrade and press Enter.
- Using the keypad, enter in the 9-digit software upgrade code and then press Enter.
- The time clock terminal will display the name of the upgrade.
- Press Clear to exit out of Supervisor Mode. Unplug the time clock from the power, plug it back in to reboot
 the time clock. Once the time clock is fully rebooted, the new upgrade features are ready to use.
- If there is a problem, contact our technical support team at 1-800-847-2232#1 or support@icontime.com.

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

Employee Capacity Upgrades

The TotalPass B600 comes standard with a 100-employee limit.

You can upgrade the employee capacity to 250 or 500 employees per system.

Additional Web Punch Licenses

The Web Punch employee entry allows employees to punch anytime, anywhere using a Web browser from their computer or smart phone on a LAN, WAN, or Internet...

Your time clock comes with 15 Web Punch employee licenses. Web Punch licenses are offered in packages of 5 up to a maximum of 50. Web Punch also offers advanced functionality like IP location restrictions and GPS tracking to help better manage your employee's punches.

Refer to "Chapter 10: Alternate Employee Entry Options" for instructions on setting up Web Punch.

Chapter 17: Configure for Remote Access

Connect to your time clock away from the office

- ✓ Work from home
- ✓ Multiple locations
- ✓ Employee remote punch

Follow the instructions below to set your time clock up with remote access, using Port Forwarding.

System Requirements

- A Broadband Internet connection (Cable, DSL, T1, etc.) at the location of the clock.
- TotalPass B600 connected to your network by an Ethernet (i.e. CAT5) cable.
- A router with "Port Forwarding" functionality.
- Static public/external IP address, although not required, is highly recommended. Contact your Internet Service Provider for a static public/external IP address.

Note:

For a nominal fee, IconTime offers an optional service to assist in setting up port forwarding/remote connection to your time clocks

If your business performs PCI Security Scanning for credit card processing, setup can be complicated and may be incompatible. Some customers choose to set up a separate network for their credit card processing system.

Step 1: Set Up the TotalPass on the Local Network

Follow the instructions on the <u>TotalPass Quick Start Guide</u> set up your time clock on the Local Network. Once you can access the TotalPass software Home page from a PC inside your internal/local network, you are ready to configure the system for remote access.

Step 2: Router Configuration

You will now configure your router for <u>port-forwarding</u>. Port forwarding allows computers and other network devices to connect to a specific computer or service within a private local area network (LAN), through the Internet.

These instructions include general guidelines for configuring a router for Port Forwarding. Actual steps required may vary with each router. For specific instructions on your router, please contact the router's manufacturer.

Note:

For instructions on configuring your specific router, go to the website www.portforward.com and select your router brand and model.

Assign a Static IP Address to the Time Clock

For Port Forwarding to work correctly, assign a static IP address to the time clock along with the subnet mask, gateway address and DNS address. Your Network Administrator should be able to provide you with this information.

- Determine an available IP address to be assigned to the time clock.
- Enter **Supervisor Mode** at your employee time clock terminal.
 - o Press on the time clock.
 - o Enter in your security code the default security code is **00 00 00**.
- Scroll through the options until you find the option Network Settings press Enter.
- To set a LAN static IP address, press Enter on the LAN Settings option. To set Wifi static IP address, scroll down to the Wifi Settings option and press **Enter**.
- The current IP address of the clock will appear. Press **Enter** again.
- Enter the desired IP address including leading zeros. Press Enter.

Example: 192.168.004.155

Enter the Subnet Mask - press Enter.

Example: 255.255.255.000

Enter the Gateway address - press Enter.

Example: 192.168.004.001

Note: If you an unsure of the gateway address, it is typically the same IP address as your router.

Enter the DNS address of your network - press Enter.

Example: 192.168.004.001

Press Clear to exit out of Supervisor Mode.

Open a Web browser on a computer in the same local network. In the address bar, type in the IP address of the clock to verify that you can log into the time clock.

Set Up Port Forwarding on the Router

These instructions are general guidelines for configuring a router for port-forwarding. Actual steps required may vary with each router. For instructions on configuring your specific router, go to the website www. portforward.com and select your router brand and model, or contact your router's manufacturer.

If you are using both a router and a cable modem router/DSL modem router, port forwarding must be configured on both the router and cable modem router/DSL modem router. Alternatively, you may contact your ISP to disable the router function on your cable modem router/DSL modem router so that you only need to setup port forwarding on your main network router.

 Open a web browser like Internet Explorer or Firefox. Enter the internal/ local IP address of your router in the address bar.

Examples: 192.168.1.1 and 192.168.0.1

Note:

If you do not know your router internal/local IP address, refer to How To Find Your Routers IP Address guide.

- Enter the router's 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
- Look for a tab with a name like, "Port Forwarding" or "Applications and Gaming." Each router is different, if you are unable to find these settings, refer to your router's instruction guide.
 - o Next, enter port 80 as the desired port. If port 80 is unavailable, you may enter port 9844 as an alternative.
 - o If your router asks you whether to open ports for TCP or UDP select TCP or both.
 - o Some routers offer port range option, such as; from port ___ to port ___. Enter the same number into both fields.

| Ext.Port | Protocol TCP | Protocol UDP | IP Address | Enable |
|-----------------|-----------------|-----------------|-----------------------|----------|
| 80 To 80 | ~ | | 192.168.1. 100 | ~ |

- Next, enter the static IP address assigned to the clock.
- If there is a checkbox to "enable" the port forwarding rule, be sure to check the box.
- Make sure you click on the Save Settings button, or your changes will not take effect.

Note:

You may need to reboot the router for changes to take effect.

Step 3: Connect to Your TotalPass Clock over the Internet

After your router is properly configured on port 80 or port 9844, follow the steps below to connect to the clock through the Internet.

- Look up your external/public IP address in one of the following ways; (skip to step 2 if you already know the external/public IP address provided by your ISP)
 - o On a computer on the same network as your clock, go to <u>www.ipchicken.com</u>. Your external/public IP address will be displayed on the page.
 - o Use the Port Forwarding Tester link below to verify if port 80 or port 9844 is open. If the port is not open, there is a setup issue on the clock or your router, remote access will not be available: http://www.yougetsignal.com/tools/open-ports/
- From the remote location, type the external/public IP address into a browser's address bar.
- If you opened port 80, simply enter the external/public IP address into the address bar.

Example: http:// 68.213.205.154

• If you are forwarding to port 9844, log onto the time clock using your external/public IP address followed by :9844.

Example: http://68.213.205.154:9844

Remote Connection Frequently Asked Questions

- Q I have multiple locations, not connected over a Network (LAN). How do I connect a Child Clock to the Parent Clock at my main office?
 - A To connect a Child Clock to the Parent Clock remotely over the Internet, you must forward an additional port, Port 10923.
- Q What port do I forward if SSL Data Encryption is enabled?
 - A To access the time clock application remotely, while using the SSL data encryption option, forward to Port 443. Do not use Port 80.
- Q My Internet Service Provider will not provide me with a Static external/public IP Address?
 - A If you are unable to get a static external/public IP address from your ISP, you have two options:
 - o Use the dynamic external/public IP address. If this IP address changes, you will need to use the new address in a remote web browser.
 - o Use a 3rd party dynamic DNS service provider.

Dynamic DNS allows you to use the same assigned name as a web link in your web browser without concern about the actual public IP address of the router.

List of Dynamic DNS Service Providers:

- dyn.com
- · no-ip.com
- dnsdynamic.org
- changelP.com

Troubleshooting Remote Connection Problems

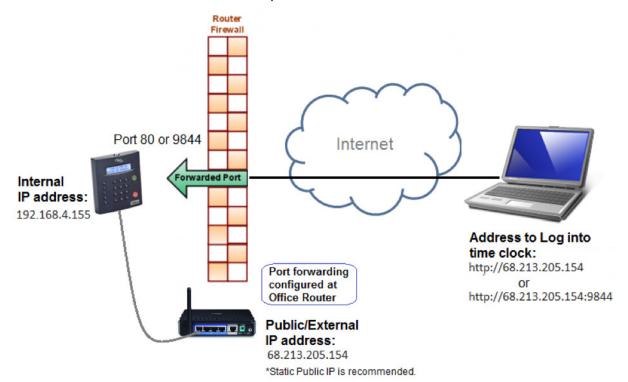
If you are unable to connect to your time clock using the external/public IP address you will need to troubleshoot your connection and configuration.

- · Restart your router.
- If you are using both a router and a cable modem router/DSL modem, ensure that port forwarding has been configured on both the router and cable modem router/DSL modem router.
- The cable modem router/DSL modem router must port forward to the local static IP address assigned to the secondary router.
- Alternatively, you may contact your ISP to disable the router function on your cable modem router/DSL modem router.
- Ensure that a static internal IP address has been assigned to the clock along with the proper subnet mask,
 DNS address, and gateway address. Reboot the time clock to ensure any IP address changes take effect.
- Make sure port forwarding has been setup correctly in the router.
- Make sure that the correct external/public IP address is entered in the web browser.
- Make sure another device on the network is not using the same IP address as the time clock.

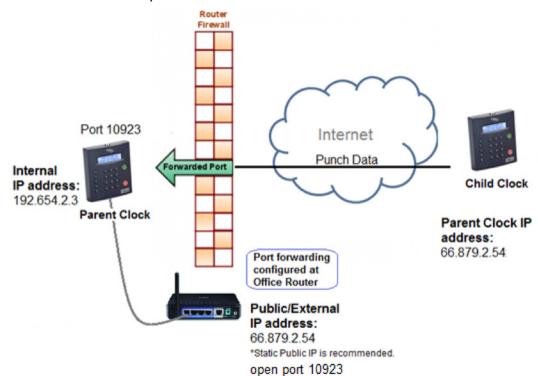
- Check the filter settings on the router to be sure that it is not interfering with the connection.
- Use an open port checker, like www.yougetsignal.com to check your external IP address and detect the correct open ports on your network.

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

Standard Remote Connection Setup



Connect Clocks Remotely with Multi-Clock



Warranty Information

IconTime, INC., a Paychex Company

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

IconTime MAKES NO WARRANTY OF ANY KIND REGARDING THIS MATERIAL, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PURPOSE. IconTime shall not be liable for errors contained herein, or for incidental consequential damages about the furnishing, performance, or use of this material.

ONE-YEAR LIMITED WARRANTY

IconTime, INC. offers the original purchaser a warranty for One (1) Year on Parts and Labor.

IconTime 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 IconTime decides a product requires service, IconTime will issue a Return Material Authorization Number (RMA). Products may be shipped to IconTime adequately insured, in their original packaging or equivalent, with shipping charges prepaid. Risk of loss or damage during shipping to IconTime 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 IconTime.

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 IconTime, 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.

IconTime 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 IconTime unit develops during the warranty period, contact IconTime SERVICE DIVISION, at the address below.

There are no other express warranties except as listed above.

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IconTime, Inc. 9000 SW Gemini Drive, Bldg. 8 Beaverton, Oregon 97008

800.847.2232

FCC Part 15

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 an 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 radio frequency energy that can be safely absorbed by a user or bystander per the intended usage of the product. This product has been tested for compliance with the FCC criteria.