

## Client Account Tasks

### Employee Setup Files



Personal information and settings entered in the employee setup files will regulate per employee administration and influence much of the systems operations..



To add a new employee (or access previously defined employee information), select the *Employee Setup* link from the *Main Menu* (see illustrations below).

**Note:** The *Employee Setup* screen acts as both a navigational tool and informative summary. As a navigational tool, the company screen contains hyperlinks to each employee's personal file. As a summary tool, you can customize each of the columns displayed in order to better direct your operations. Use the screen tool-bar which includes a drop-down menu containing all the *Employee Setup* items. The drop-down menu is associated with table buttons such as *Show Column* and *Hide Column* to specify the table's display (see illustration below).

Online Timekeeping  
 Date: 2/16/2005  
 Login: siteman

Main Menu  
 Sample Site

**Administration**  
[Employee Setup](#)  
[Time Cards](#)

Current Period starting 2/14  
 Previous Period ended 2/13  
[All other periods](#)

**Reports**

Core Version 2.1.161

Log Out

Employee Setup

Employee Name	Dept.	SSN	Code
<a href="#">(add new)</a>			
<input type="checkbox"/> <a href="#">Else, Someone</a>	Liquor		FU
<input type="checkbox"/> <a href="#">Guy, Another</a>	Liquor	987654321	SUP001
<input type="checkbox"/> <a href="#">Guy, Some</a>	Grocery		KMCG001
<input type="checkbox"/> <a href="#">Noggin, Richard</a>	Liquor		1234
<input type="checkbox"/> <a href="#">Richardson, Richard</a>		999332222	C121

5 employees shown.

[Check All](#) | [Clear All](#) | [Work with selected employees](#)

2 From the setup screen you may operate in one of three ways: *add new* employee record; work with an individual employee by clicking on the desired name or work with multiple employees simultaneously by checking each individual's corresponding check-box along with the *work with selected employees* button provided below the table (see illustration above).

3 Information entered into the *Employee Setup* screen will initiate much of the system's operation.

Each item will accomplish one or more tasks as explained below. Items from the employee's personal file you'll notice are links, indicated as blue text, which offer a help pop-up display explaining the function of each in the system

Employee Setup

[First Name](#)

[Last Name](#)

[Title](#)

[Department](#)

[Location](#)

[Supervisor](#)

[Home 1](#)

[Home 2](#)

[Home 3](#)

[SSN](#)

4

System operation for each item will apply as listed below. Utilize help pop-ups to better understand each item and its use.

<a href="#">WEP Password</a>	<input type="text"/>	<a href="#">Auto Lunch</a>	<input type="text"/> minutes, after <input type="text"/> hours.
<a href="#">Start Date</a>	<input type="text"/>	<a href="#">End Date</a>	<input type="text"/>
<a href="#">Employee Code</a>	<input type="text"/>	<a href="#">Default Pavrate</a>	<input type="text"/>
<a href="#">Pay Rate 1</a>	<input type="text"/>	<a href="#">Pay Rate 2</a>	<input type="text"/>
<a href="#">Pay Rate 3</a>	<input type="text"/>	<a href="#">Card Number 1</a>	<input type="text"/>
<a href="#">Card Number 2</a>	<input type="text"/>	<a href="#">Card Number 3</a>	<input type="text"/>
<a href="#">Schedule</a>	<input type="text"/>	<a href="#">Additional Options</a>	<input type="text"/>
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>	

## Field Definition

### Last Name

- Coordinated with reporting

### Title

- Job title coordinated with reporting

### Home Department

- Designate employee department
- Visible on reports

### Location

- Designate employee location
- Visible on reports

### Supervisor

- Associates the employee to a supervisor

### Default Pay Rate

- Default or standard pay-rate for the employee

### Home 1,2,3

- Manages multiple departments and pay rates for the employee (Coordinate 1,2, and 3 with *Alternate Pay Rates 1, 2 and 3* if needed) *Alternate Pay Rate*
- Manages multiple pay rates when dealing with departments or job codes
- Coordinates pay rates with departments titled *Home 1, 2 and 3* (requires "AltPayX" script activation)

### Social Security Number

- A Social Security Number is accepted for punching in and out

### Auto Lunch Minutes

- These minutes will be automatically deducted on a daily basis (a minimum of hours worked for the day can be set to

trigger the automatic lunch deduction e.g..45 minutes after 5 hours worked)

#### First Name

- Coordinated with reporting

#### Auto Lunch Hours

- Indicates requirement for how many hours consecutive (e.g.. clocking out would reset the hours) that must be worked before automatic lunch minutes are deducted
- Use when Auto Lunch Minutes are designated for an employee

#### Web password

- Setting a password permits an employee to both clock in by PC and view their timecard. Clocking in and out is restricted to certain PCs; however, viewing a personal time card can be done at any PC with Internet access

#### Employee Code

- A separate ID number entered here can be included in reports

#### Card Number 1,2,3

- Clock in using any number sequence from 1 to 8 digits (requires Manual Clock module activation)  
Round to Schedule (Operates as a day-to-day standard-set schedule )
- Round an employee's activity to designated scheduling times
- Terminate an Employee  
In the Employee Setup edit screen
- Click on the employee's name

#### End Date

- Date entered acts as a termination date for an employee's activity
- Employee's with expired termination date are moved to the inactive list where employee's activity records are saved

#### Additional Options

- Offers an employee a union label if needed for payroll software
- Individual overtime rules can be applied to an employee:
  - Deactivate OT rules
  - Overtime hours after 8 hours worked in a day
  - Overtime hours after 32 hours in a week

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