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Foreword

This is just another title page
placed between table of contents
and topics

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1 Introduction

SMART Technologies Work Flow & Time Management software allows for organizations, to save administrative time and money and improve security in one go. This product is a necessity for organizations have a desire to manage and monitor their employee's time, works hours and punctuality. This software creates work schedules and rosters of varied types such as: training, daily work schedules, leave of absence, time tables etc. It places employees into specific department/service areas as their shifts require.

Companies will derive an immediate benefit from the Work Flow and Time & Attendance Management software (SMART ScheduleMaster Pro) as SMART Technologies is confident that this product will fast become a critical component in the management and monitoring of employee attendance, punctuality and work hours. This product uses

Biometric (fingerprint identification) technology and has built in algorithms with the automated procedures required to compute Regular, Overtime, Double, Triple and Extended Overtime. Varied pay rates can be set for Holidays, Weekends, and Day Offs which are then summed for each work day, a 40hr work week, fortnightly schedule or monthly.

This innovative and unique software is also one of the most current products of its kind available locally and uses Biometric (finger scan) Identification and Recognition hardware to record employees in and out times.

With this product, you will be able to:

- Schedule your employees quickly, easily and efficiently.
- Save employees clock in/out times using our fingerprint identification terminals.
- Tabulate work hours quickly and easily; eliminating manual errors.
- Export data directly to your payroll software eliminating time consuming data entry
- Schedules shifts, vacations, leaves and assigns to departments with optional notes and reasons.
- Employees can Clock-In/Out and various settings configured to calculate their work hours and periodic pay amounts.
- Schedules can be view either daily, weekly, bi-weekly or monthly.
- Monitor time summaries while you schedule to ensure you are scheduling to meet the demand work load
- Auto email system administrator/manager when employee is late
- Export reporting using the dynamic and powerful Crystal Reports architecture.
- among other features.

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The software is available in four versions. Express, Standard, Corporate and Enterprise.

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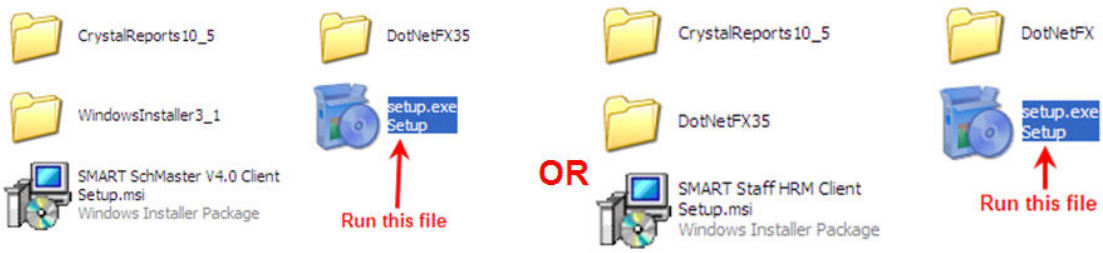
2 Basic Working Procedures

2.1 Installing Software

HOW TO INSTALL SMART TECHNOLOGIES SOFTWARE

1. On the data drive, CD or share server directory, run the client setup file shown below for either SMART Staff Manager or SMART ScheduleMaster applications.



1. Click NEXT until the installation is completed.

Note: Ignore any dll registration errors that may occur.

3. Run application from DESKTOP or start menu option under All Programs > SMART Software

4. Enter license information. You can get a license key on the following web page: http://www.smarttechjm.com/support.htm. Request a license code by entering the details required. The **AUTH. CODE is ST2000**

Note: If you are experiencing difficulty with obtaining a code, please contact SMART Technologies at 1-876-754-9863 or email info@smarttechjm.com with the 16 digit installation ID number. You will be then given a license code. This is required for each computer the software is being installed on

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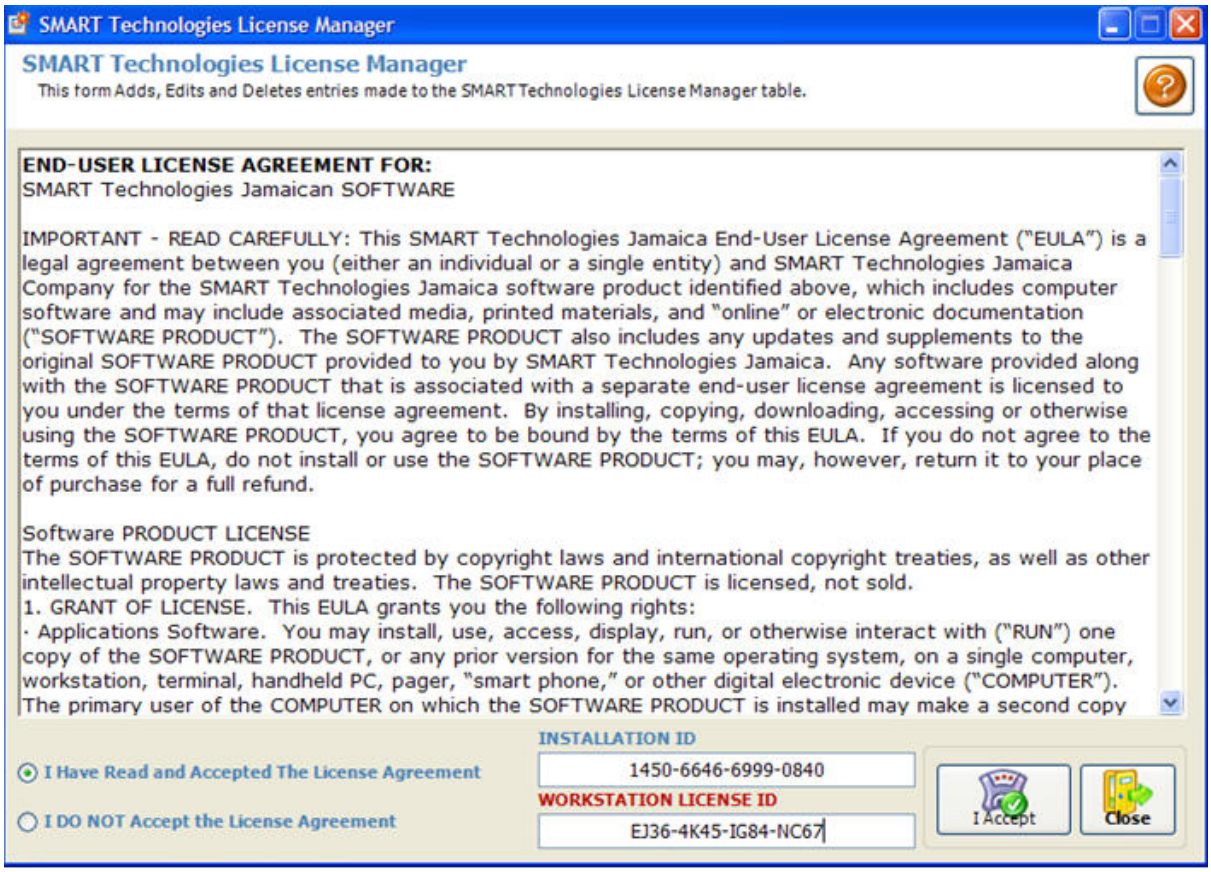
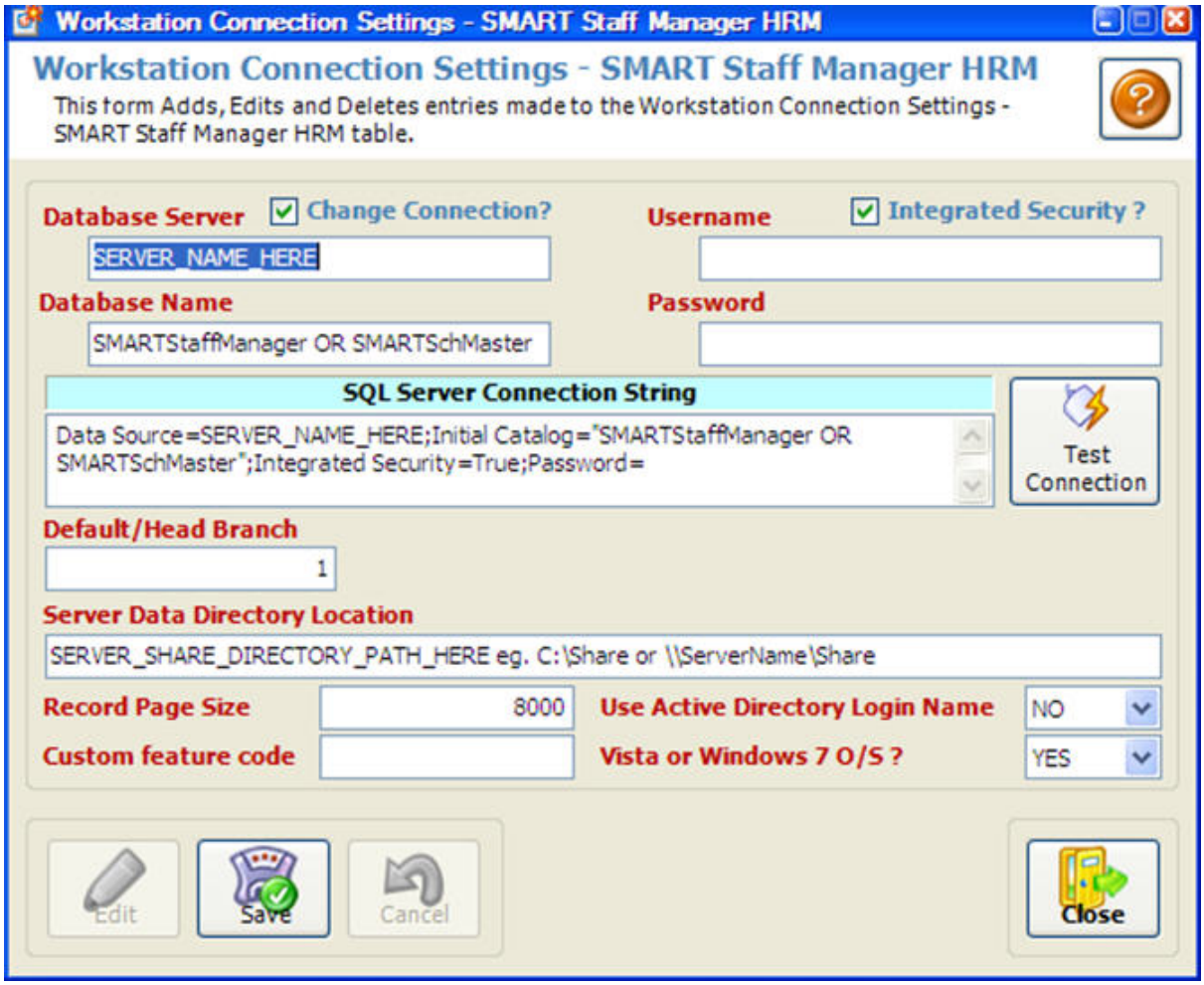


5. Then configure database access.



Note: without a username or password, windows active directory authentication is being used. Therefore users must have access to the database individually or placed within a user group designated by the system administrator to gain access.

This is typically configured under the SECURITY >> LOGINS section of Microsoft SQL Server Enterprise Manager where user or group is given access privileges to either the ***SMARTStaffManager*** *or* ***SMARTSchMaster*** *databases.*

Each software (SMART Staff HRM or SMART ScheduleMaster Time Management) has a separated share directory. Eg.
SMART Staff: \\ServerName\SMARTTechShare\DATA\SMARTStaffManager
ScheduleMaster: \\ServerName\SMARTTechShare\DATA\SMARTSchMaster

Note: You can log into a previous installation and go to the File Menu > Configuration to get the configuration settings used for your server.

6. You can TEST CONNECTION and if successful then Save and exit. Reopen the application and the login screen should appear.

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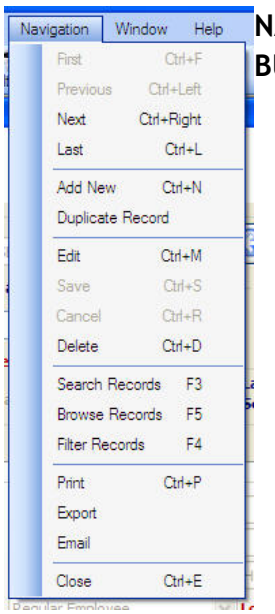
2.2 Getting Started

2.2.1 Navigation & Data entry operations toolbar

The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

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Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

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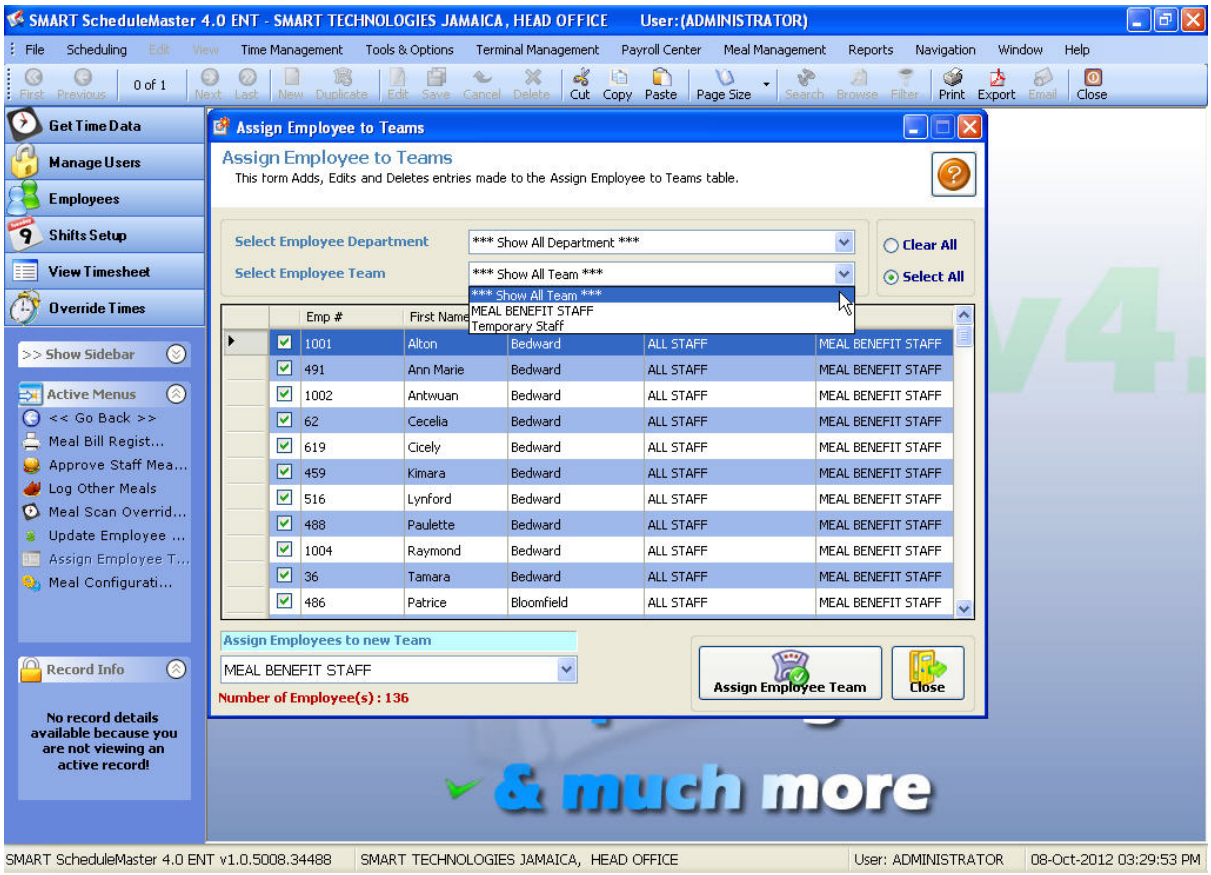
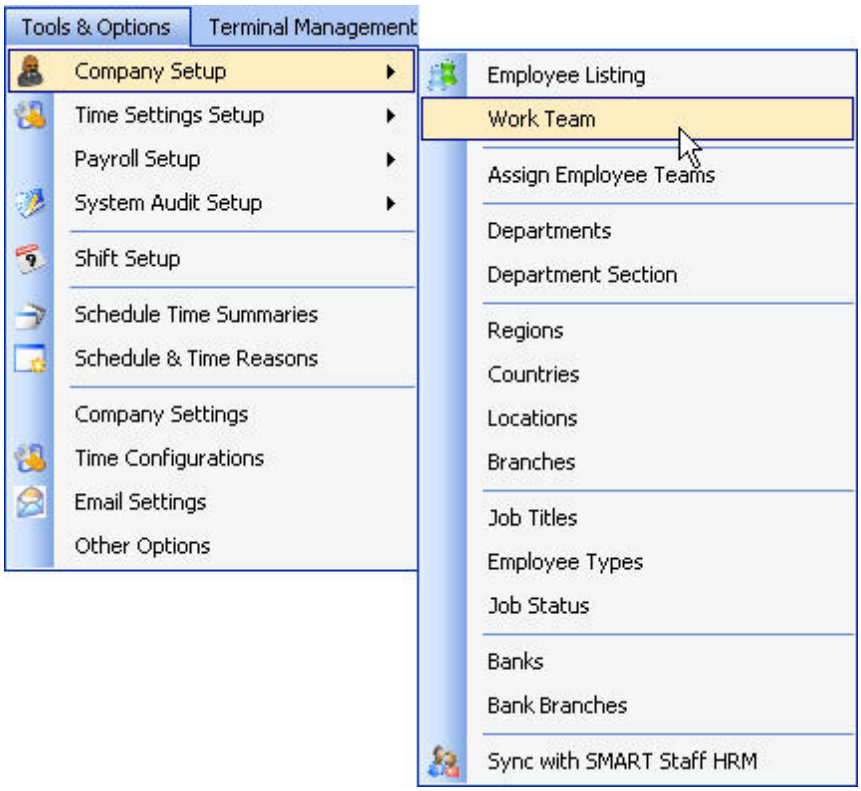


The user can simply minimize the current screen and open the relevant screen with the supporting list information; which in this case is **Work Team**. They then proceed to add the new Work Team and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the **Work Team** drop down box and selecting Refresh List. The following screen shots detail the process:

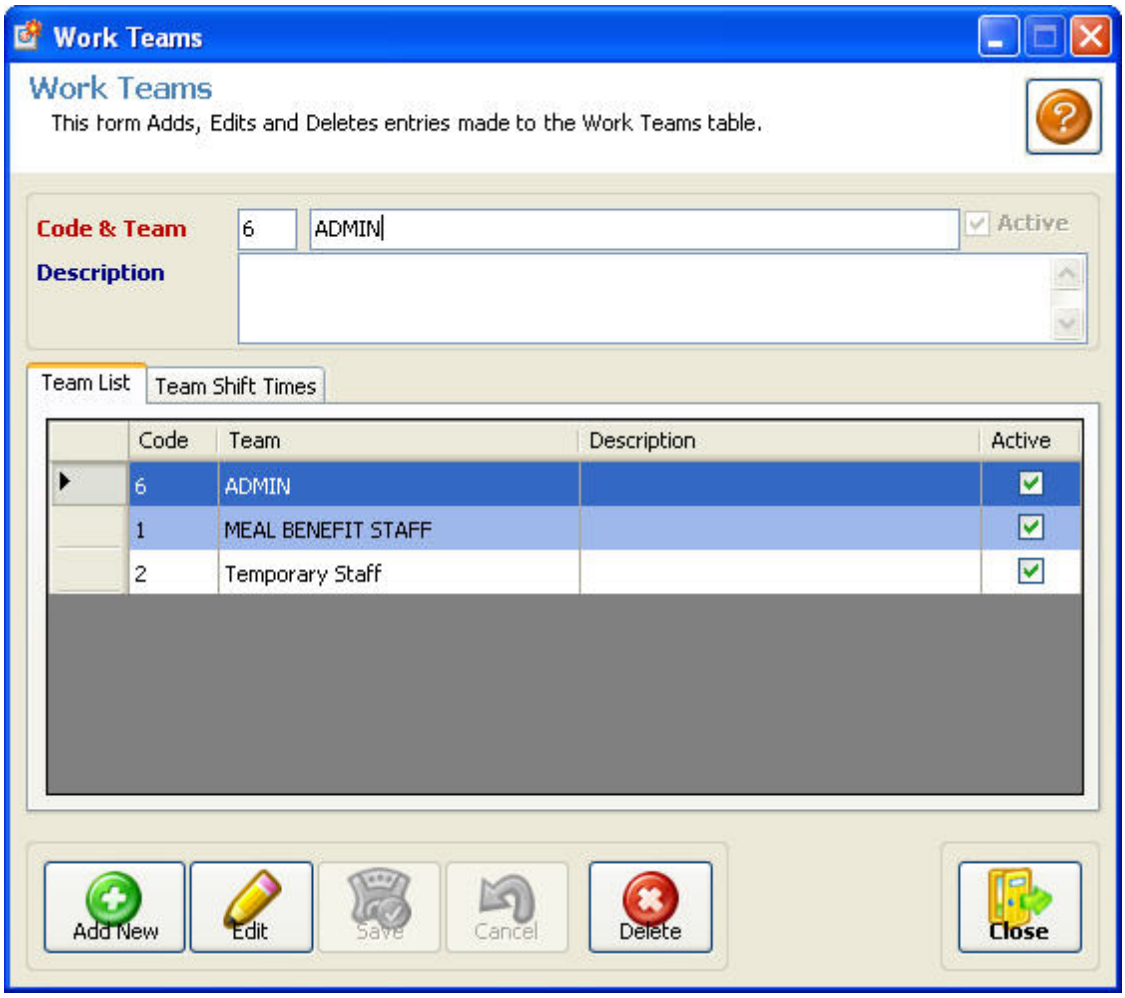
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



Step 2 - Click the ADD NEW button

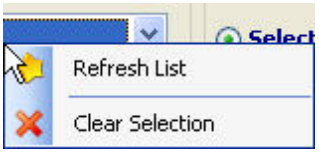
Step 3 - Input the Code and Team Name



Step 4 - Save the Information

Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List



The updated information will now appear:

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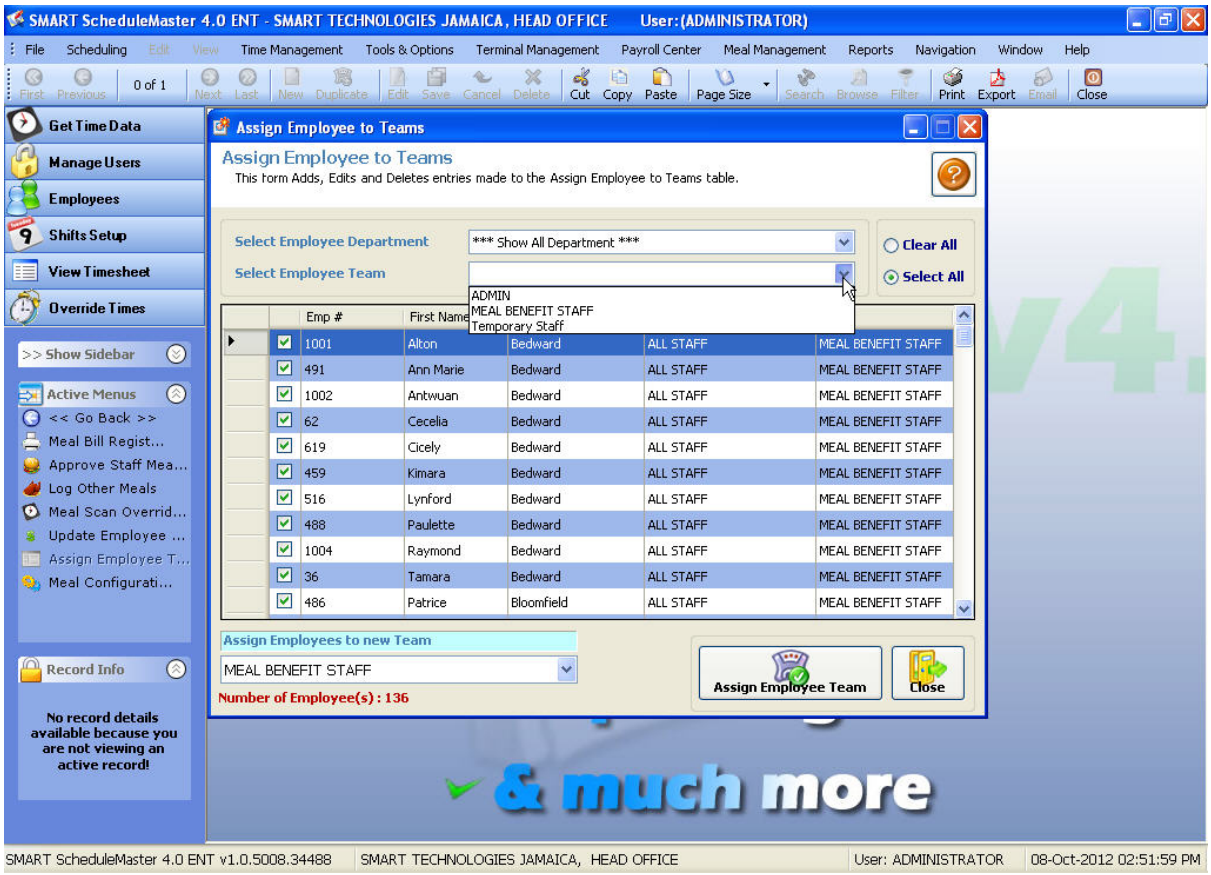

2.2.2 HOW TO ADD EDIT OR DELETE RECORDS

In using the SMARTSchedule Master, you are given the flexibility to Add, Edit and Delete information as required. Adding new records to SMART ScheduleMaster is very simple, simply press the Add New button on the data entry screen and fill out the mandatory fields that are labeled in red. Press the save button when complete. Additionally, before editing or deleting information in SMART ScheduleMaster, you should be able to retrieve the particular record from the database using the Browse, Search or Filter options

How To add data use the Add Function

How To edit or correct information in any function use Edit Function

How To remove invalid or incorrect information use Delete Function

How To exit use the Close Function

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2.2.2.1 Browsing, Searching and Filtering records

Being able to quickly browse and find records is critical and will allow for speedy editing of data.

These buttons are located on the toolbar and is available when a data entry screen is opened. SMART ScheduleMaster allows for you to locate records by:

1. Browsing a list of records -
2. Searching for individual records by using a keyword
3. Filtering records list to narrow data search

How to: Browse, Search or Filter records.

2.2.2.1.1 Browsing for records

Use the Browse button on the navigation toolbar to conduct a general search

A detailed list will appear on the screen (sample below is from the Employees Tab), and you will be prompted to enter the information you are searching for

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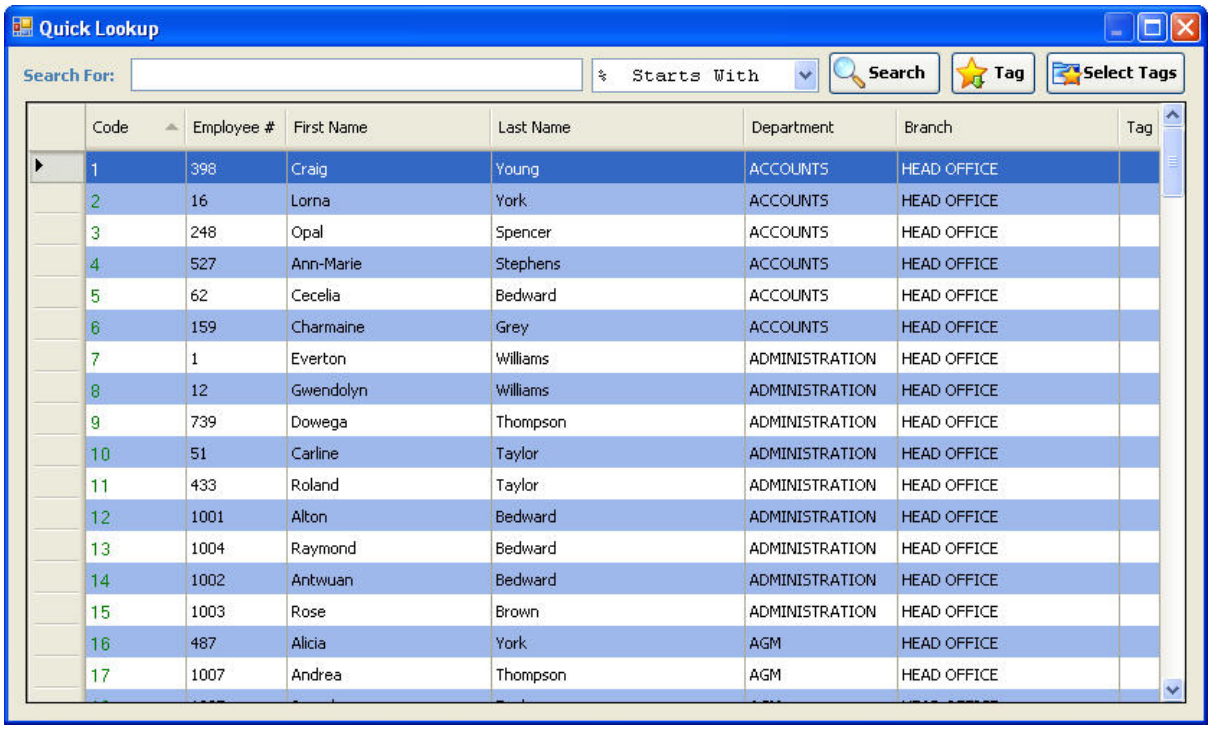
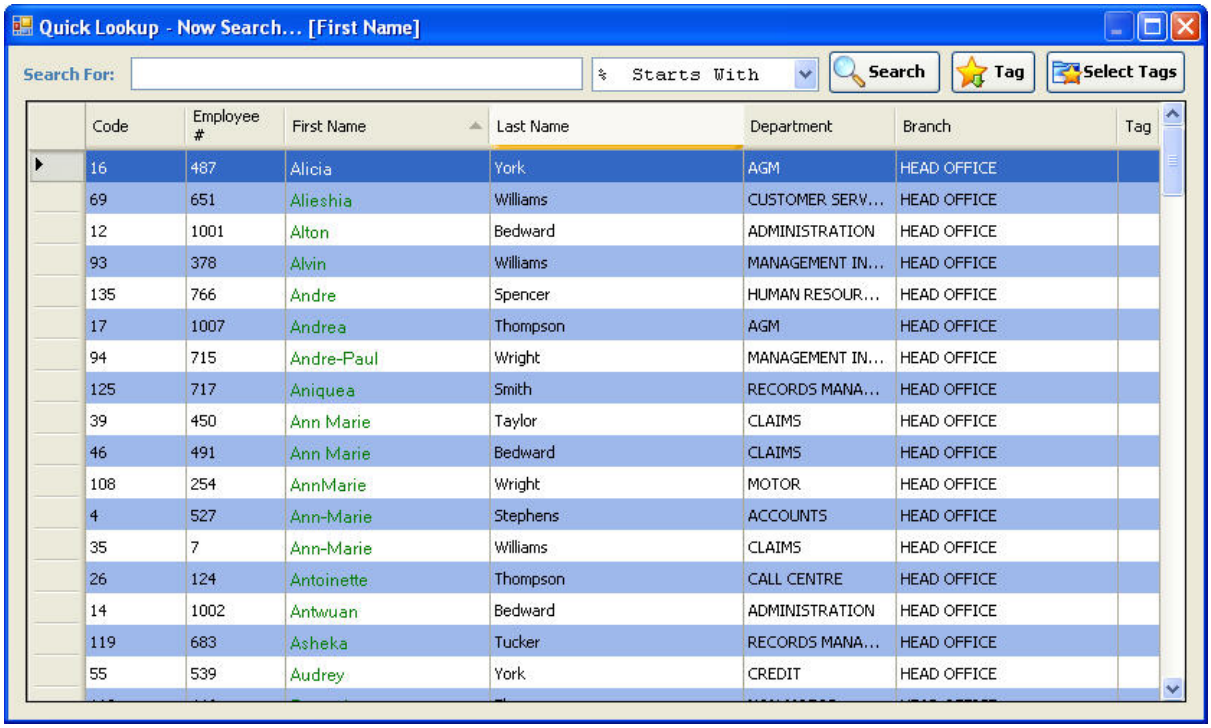


Code	Employee #	First Name	Last Name	Department	Branch	Tag
1	398	Craig	Young	ACCOUNTS	HEAD OFFICE	
2	16	Lorna	York	ACCOUNTS	HEAD OFFICE	
3	248	Opal	Spencer	ACCOUNTS	HEAD OFFICE	
4	527	Ann-Marie	Stephens	ACCOUNTS	HEAD OFFICE	
5	62	Cecelia	Bedward	ACCOUNTS	HEAD OFFICE	
6	159	Charmaine	Grey	ACCOUNTS	HEAD OFFICE	
7	1	Everton	Williams	ADMINISTRATION	HEAD OFFICE	
8	12	Gwendolyn	Williams	ADMINISTRATION	HEAD OFFICE	
9	739	Dowega	Thompson	ADMINISTRATION	HEAD OFFICE	
10	51	Carline	Taylor	ADMINISTRATION	HEAD OFFICE	
11	433	Roland	Taylor	ADMINISTRATION	HEAD OFFICE	
12	1001	Alton	Bedward	ADMINISTRATION	HEAD OFFICE	
13	1004	Raymond	Bedward	ADMINISTRATION	HEAD OFFICE	
14	1002	Antwuan	Bedward	ADMINISTRATION	HEAD OFFICE	
15	1003	Rose	Brown	ADMINISTRATION	HEAD OFFICE	
16	487	Alicia	York	AGM	HEAD OFFICE	
17	1007	Andrea	Thompson	AGM	HEAD OFFICE	

Use the column headers to sort the list in your choice of order; e.g. First name or Last name or Department, etc.



Code	Employee #	First Name	Last Name	Department	Branch	Tag
16	487	Alicia	York	AGM	HEAD OFFICE	
69	651	Alieshia	Williams	CUSTOMER SERV...	HEAD OFFICE	
12	1001	Alton	Bedward	ADMINISTRATION	HEAD OFFICE	
93	378	Alvin	Williams	MANAGEMENT IN...	HEAD OFFICE	
135	766	Andre	Spencer	HUMAN RESOUR...	HEAD OFFICE	
17	1007	Andrea	Thompson	AGM	HEAD OFFICE	
94	715	Andre-Paul	Wright	MANAGEMENT IN...	HEAD OFFICE	
125	717	Aniquea	Smith	RECORDS MANA...	HEAD OFFICE	
39	450	Ann Marie	Taylor	CLAIMS	HEAD OFFICE	
46	491	Ann Marie	Bedward	CLAIMS	HEAD OFFICE	
108	254	AnnMarie	Wright	MOTOR	HEAD OFFICE	
4	527	Ann-Marie	Stephens	ACCOUNTS	HEAD OFFICE	
35	7	Ann-Marie	Williams	CLAIMS	HEAD OFFICE	
26	124	Antoinette	Thompson	CALL CENTRE	HEAD OFFICE	
14	1002	Antwuan	Bedward	ADMINISTRATION	HEAD OFFICE	
119	683	Asheka	Tucker	RECORDS MANA...	HEAD OFFICE	
55	539	Audrey	York	CREDIT	HEAD OFFICE	

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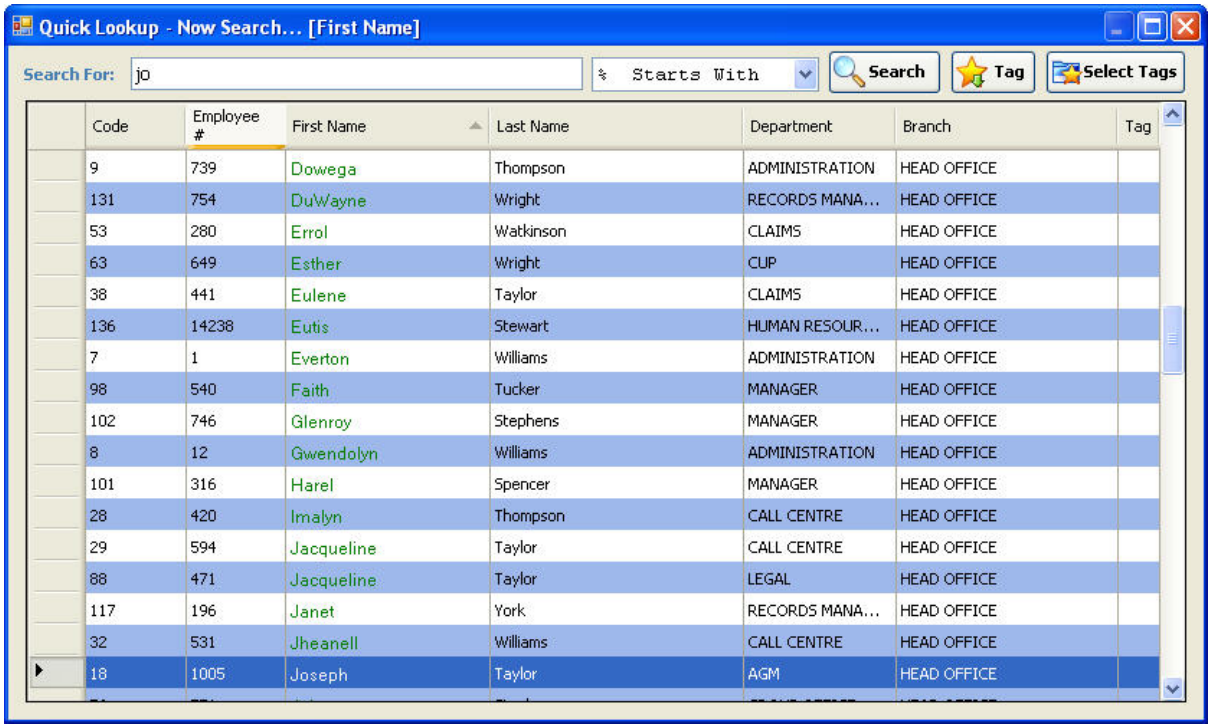
In the "search for" section above the list, type the first few letters of the employee's first name that you are searching for



Code	Employee #	First Name	Last Name	Department	Branch	Tag
9	739	Dowega	Thompson	ADMINISTRATION	HEAD OFFICE	
131	754	DuWayne	Wright	RECORDS MANA...	HEAD OFFICE	
53	280	Errol	Watkinson	CLAIMS	HEAD OFFICE	
63	649	Esther	Wright	CUP	HEAD OFFICE	
38	441	Eulene	Taylor	CLAIMS	HEAD OFFICE	
136	14238	Eutis	Stewart	HUMAN RESOUR...	HEAD OFFICE	
7	1	Everton	Williams	ADMINISTRATION	HEAD OFFICE	
98	540	Faith	Tucker	MANAGER	HEAD OFFICE	
102	746	Glenroy	Stephens	MANAGER	HEAD OFFICE	
8	12	Gwendolyn	Williams	ADMINISTRATION	HEAD OFFICE	
101	316	Harel	Spencer	MANAGER	HEAD OFFICE	
28	420	Imalyn	Thompson	CALL CENTRE	HEAD OFFICE	
29	594	Jacqueline	Taylor	CALL CENTRE	HEAD OFFICE	
88	471	Jacqueline	Taylor	LEGAL	HEAD OFFICE	
117	196	Janet	York	RECORDS MANA...	HEAD OFFICE	
32	531	Jheanell	Williams	CALL CENTRE	HEAD OFFICE	
18	1005	Joseph	Taylor	AGM	HEAD OFFICE	

The name first matched name with your search will be highlighted. You may use the scroll keys on the keyboard or the scroll bar located to the right of the screen to navigate further. Once you have highlighted the row you wish to select you may double click or press enter to access the the row of information. From here you may add, edit or delete information.

Match By Options

The "Match By" options allow you to be flexible with your search. Example:

= Is Equal : This will look for a direct match (not case sensitive) Eg. Adams = Adams

>= Greater & Equal : This will find all values above or equal to your search value for

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number and some text values.

Eg. For numbers: 10 >= 10 or 15 >= 10. For texts: Brown >= Adams (i.e B is after A in the alphabet)

> Greater Than : This will find all values above your search value for number and some text values.

Eg. For numbers: 15 > 10. For texts: Brown > Adams (i.e B is after A in the alphabet)

<= Less & Equal : This will find all values lower or equal to your search value for number and some text values.

Eg. For numbers: 10 <= 10 or 10 <= 15. For texts: Adams <= Brown (i.e A is after B in the alphabet)

<= Less : This will find all values lower than your search value for number and some text values.

Eg. For numbers: 10 < 15. For texts: Adams < Brown (i.e A is after B in the alphabet)

%% Contains : This will find all values containing your search value whether at the start, any part of or at the end of the text.

Eg. Adams contains "ad", "am" or "ms"

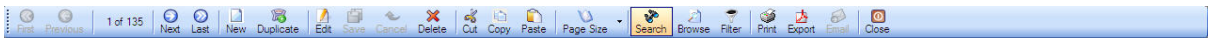
% Starts with : This will find all records that starts with your search value. Eg. Adams starts with "ad"

NOTE: Additional browsing and searching options can be added to each data entry screen. Click here to see how!

Related: HOW TO ADD EDIT OR DELETE INFORMATION

2.2.2.1.2 Searching for records

Use the Search button on the navigation toolbar to conduct a individual record search.



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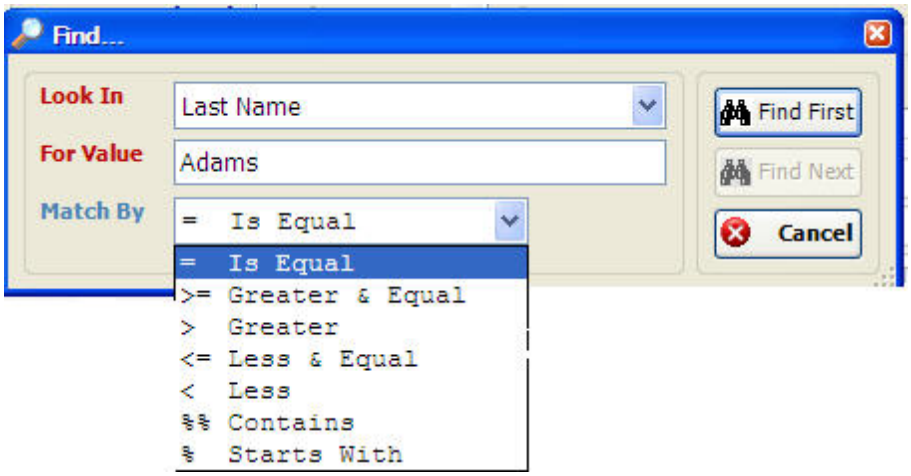
Select the search field from the box labeled "Look In" and enter your Search value.



Press the "Find First" button to locate the first record in the list according to the database index. Use the "Find Next" button to continue searching until your desired record is on screen.

Match By Options

The "Match By" options allow you to be flexible with your search. Example:

= Is Equal : This will look for a direct match (not case sensitive) Eg. Adams = Adams

>= Greater & Equal : This will find all values above or equal to your search value for number and some text values.

Eg. For numbers: 10 >= 10 or 15 >= 10. For texts: Brown >= Adams (i.e B is after A in the alphabet)

> Greater Than : This will find all values above your search value for number and some text values.

Eg. For numbers: 15 > 10. For texts: Brown > Adams (i.e B is after A in the alphabet)

<= Less & Equal : This will find all values lower or equal to your search value for number and some text values.

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Eg. For numbers: 10 <= 10 or 10 <= 15. For texts: Adams <= Brown (i.e A is after B in the alphabet)

<= Less : This will find all values lower than your search value for number and some text values.

Eg. For numbers: 10 < 15. For texts: Adams < Brown (i.e A is after B in the alphabet)

%% Contains : This will find all values containing your search value whether at the start, any part of or at the end of the text.

Eg. Adams contains "ad", "am" or "ms"

% Starts with : This will find all records that starts with your search value. Eg. Adams starts with "ad"

NOTE: Additional browsing and searching options can be added to each data entry screen. Click here to see how!

Related: HOW TO ADD EDIT OR DELETE INFORMATION

2.2.2.1.3 Filtering records

Use the Filter button on the navigation toolbar to limit the record list to only those records matching the filter values.

Select your desired filter options and click the apply filter button. Only those records matching your selection will be shown on the data entry screen you are filtering. To clear the filter, select the Filter button on the toolbar and click the Clear Filter button.

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NOTE: Additional filter options can be added to each data entry screen. Click here to see how!

2.2.2.2 Add & Duplicate Function

The Add New Button

Adding a new button operates consistently throughout the SMART ScheduleMaster application.

When a new record entry is required, always look out for this button "Add New". Left mouse click on this button to clear the screen and allow you to enter the values for the new item.

Note: Fill out all items labeled RED, the others are optional.

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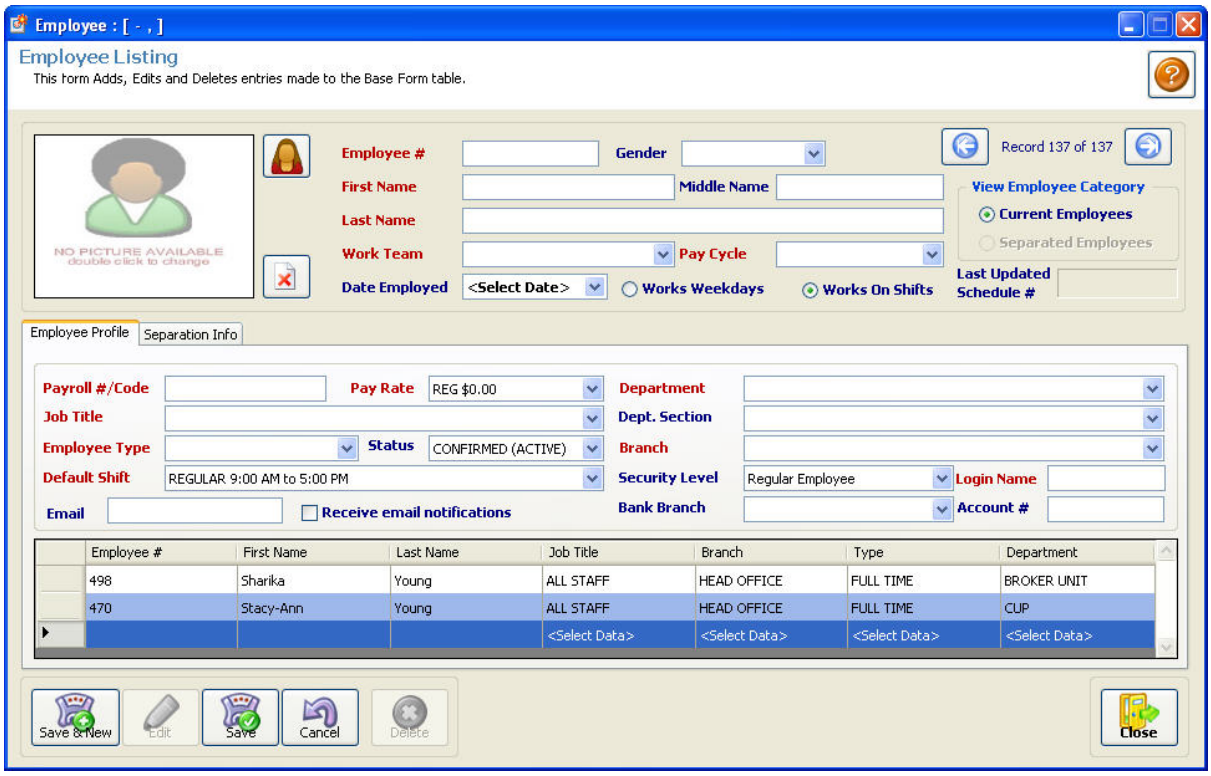

Example: Adding a new "Employee" in SMART ScheduleMaster.

To add a new Employee you first left mouse click the "Add New" button. Enter the employee name and other required information labeled in red then left mouse click either on the "Save & New " button if you want to save the current record and add another employee after, or just click "Save " button if you're only creating a single record; and you're done. Left mouse click the " Close " button to exit the window.

The Duplicate Button

The duplicate button works similar to the Add New except it does not clear a blank screen for data entry. Instead, this button will make a duplicate copy of an existing record and place it on screen for modification then saving. This feature is particularly handy when entering multiple records with similar information. Eg. Employees of the same location and department (only name and employee number would be different).

Reminder: When duplicating records, always remember to make the necessary changes before saving!

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Related Topics

Edit
Save
Save & New
Cancel
Delete
Close

2.2.2.3 Edit Function

Editing is carried out in a consistent manner within the SMART ScheduleMaster application.

First find the particular record from the database using the Browse, Search or Filter options. Then left mouse click the "Edit" button to allow the values of existing data to become enabled and editable. Make your adjustments then save when done.

Note: Fill out all items labeled RED, the others are optional.

Example: Editing a "Location" in SMART Schedule Master.

To edit any existing Location, first find the particular record from the database using the Browse, Search or Filter options.

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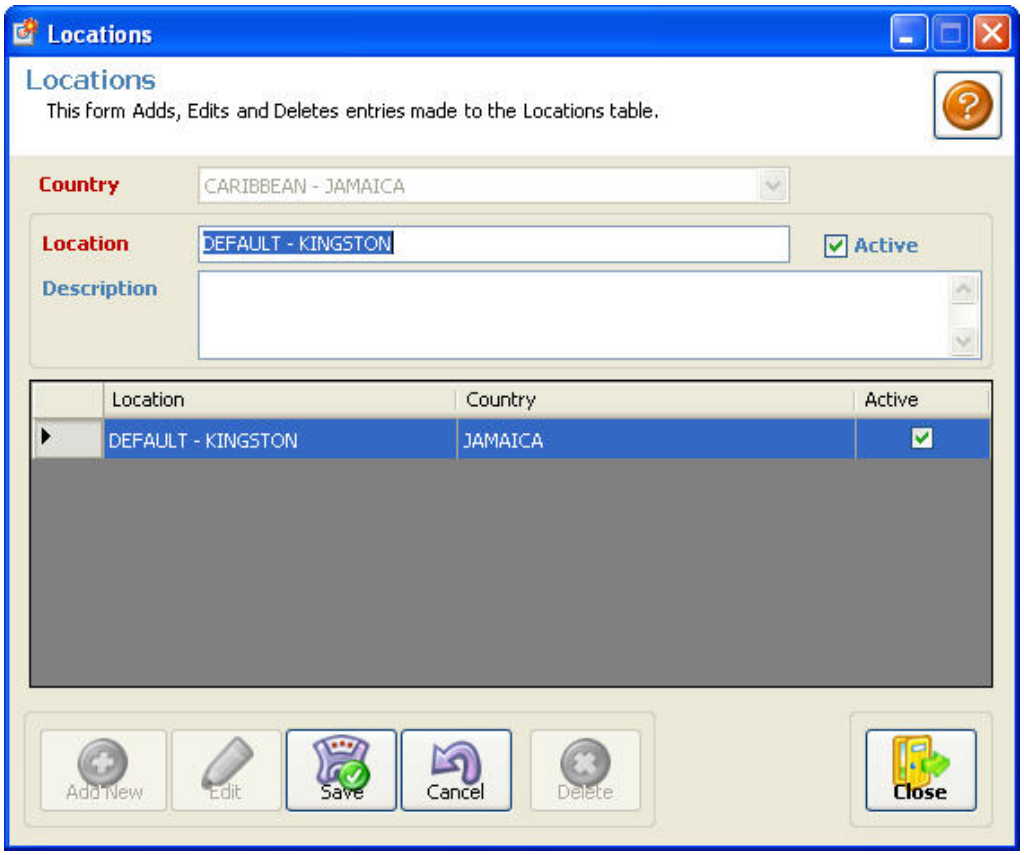

Once selected left mouse click on the "Edit" button and start editing the name of the Location in the "Location" field. Hit the " Save " button to finalize your update.

Related Topics

Add
Save
Save & New
Cancel
Delete
Close

2.2.2.4 Delete Function

Deleting a record is carried out in a consistent manner within the SMART ScheduleMaster application.

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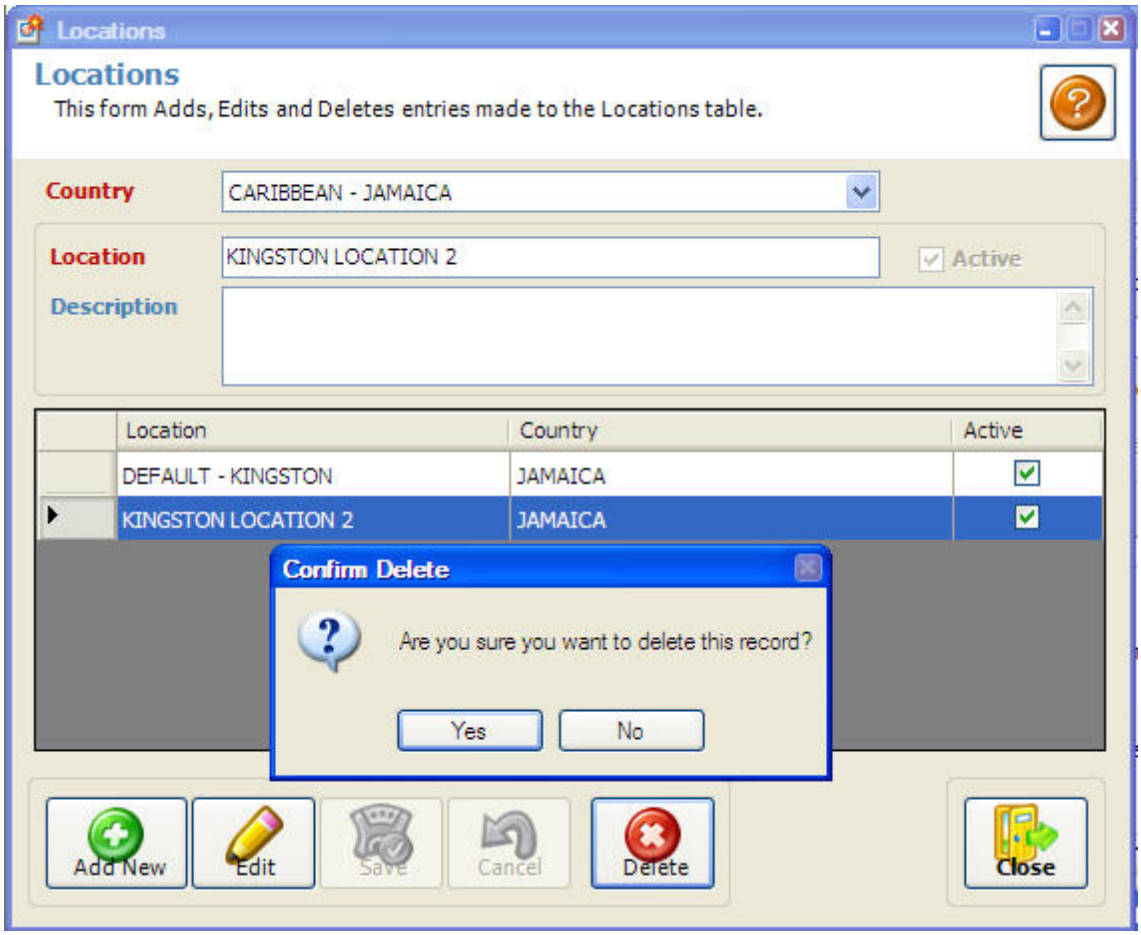
First find the particular record from the database using the Browse, Search or Filter options. Left mouse click the "Delete" to initiate the process of deleting the currently selected and displayed record. A confirmation dialog will immediately appear asking you to confirm removal of the selected record. Once confirmed, the affected record is permanently removed.

NOTE: Deleted records can only be retrieved by the database administrator if the Audit module is enabled or a backup or transaction log is available!

Example: Deleting a "Location" in SMART ScheduleMaster.

To delete a Location, first find the particular record from the database using the Browse, Search or Filter options.



To ensure that the Location is selected. Once selected left mouse click on the "Delete" button. A confirmation window will appear, click "Yes" if you want to confirm deleting

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the Location, and "No" to cancel.

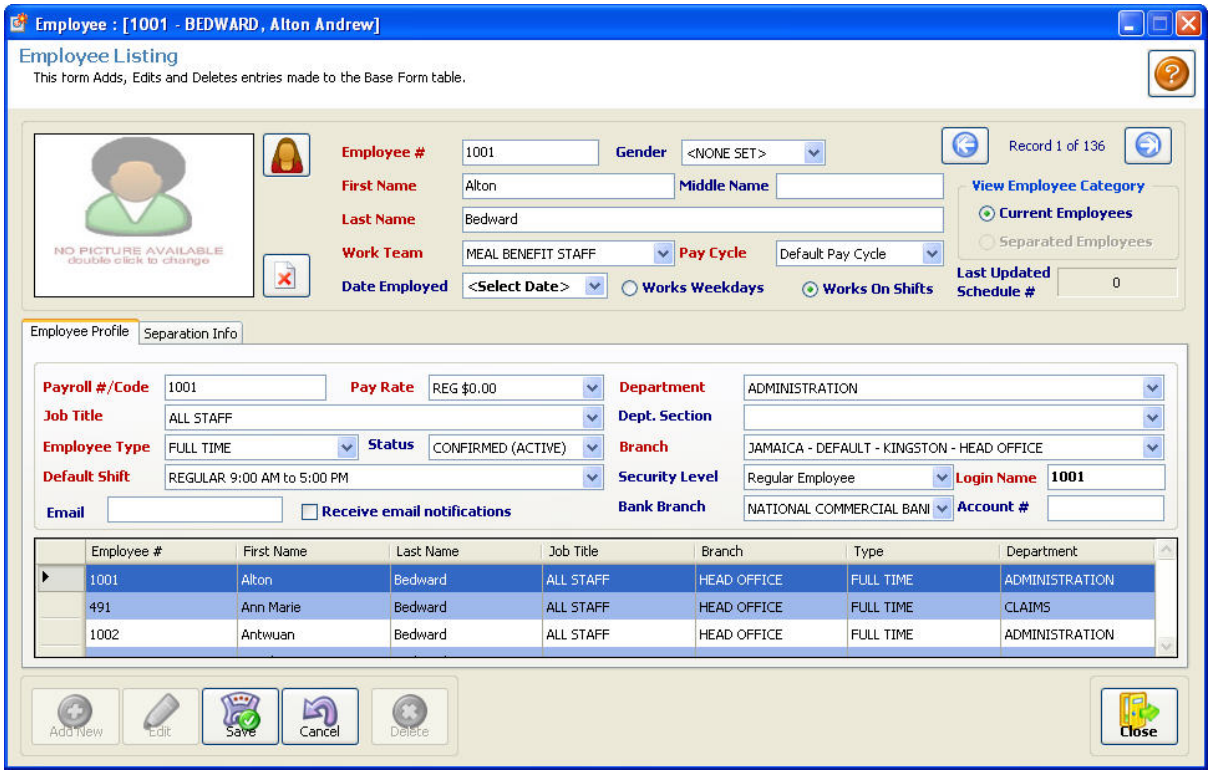
Related Topics

Add
Edit
Save
Save & New
Cancel
Close

2.2.2.5 Save Function

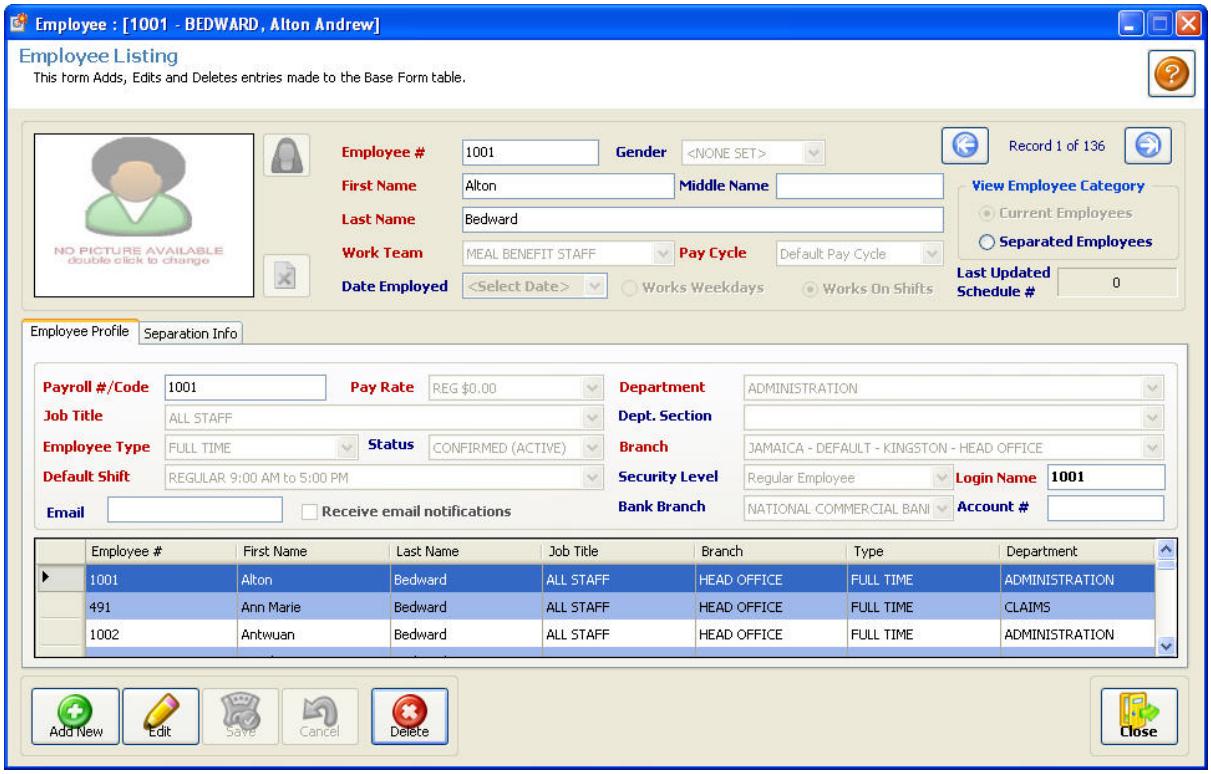
Saving new or edited data is carried out in a consistent manner within the SMART ScheduleMaster application.

After entering a new record or editing an existing record, use the "Save" button to commit the new or edited information into the system.



Clicking on the save option will commit the new information and keep the screen open

thereby allowing you to continue to work without re-opening the screen.



Related Topics

Add

Edit

Save & New

Cancel

Delete

2.2.2.6 Save & New Function

Save & New is equivalent to manually left mouse clicking the "Save" button to commit record, and then left mouse clicking "Add" button for the insertion of new record. We've made easy for you by combining this common work flow into one click; the "Save & New" button.

After entering a new record, use the "Save & New" button to commit the new information into the system and clear the screen in preparation for the entry of another new record.

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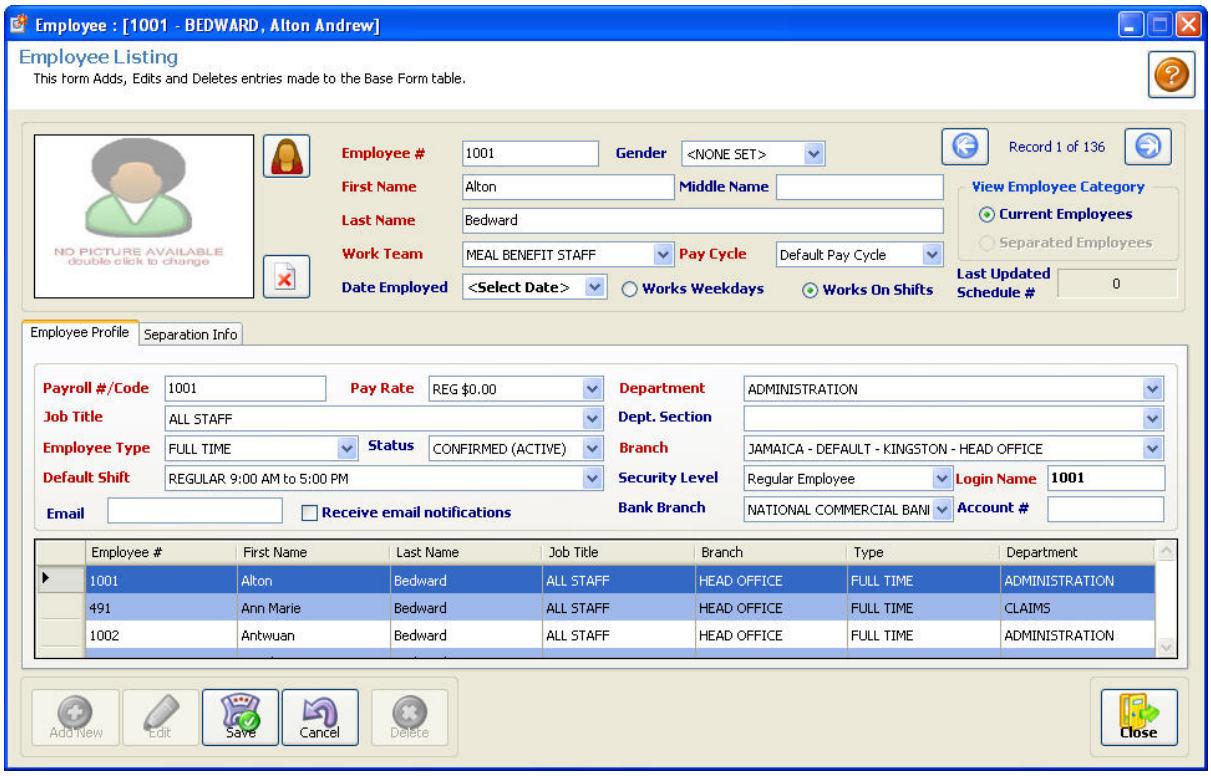

Clicking on the save & New option will commit the new information and create a new blank screen thereby allowing you to begin work on a new item in the same section of the program without re-opening the screen.

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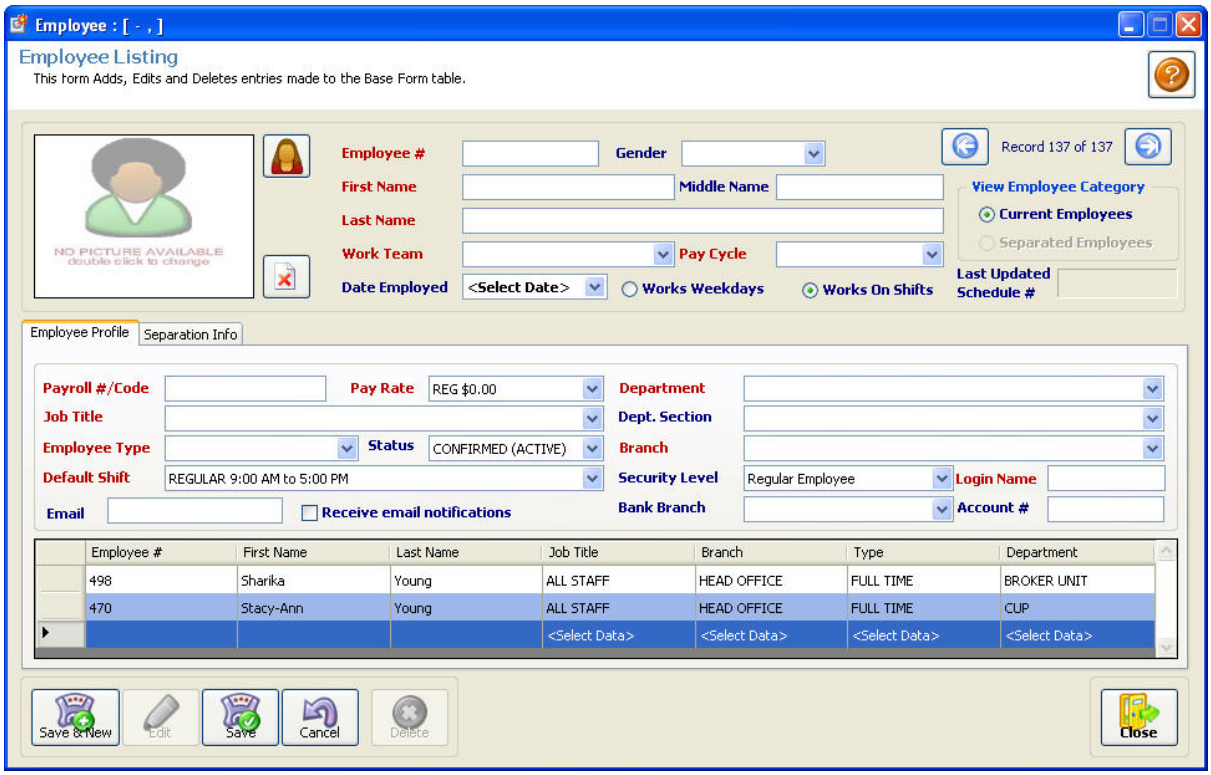

Related Topics

Add
Edit
Save
Cancel
Delete

2.2.2.7 Cancel Function

The "Cancel" button can be used to stop any action executed prior to saving it. This button can only be used when the Add New or Edit options have been executed prior.

Related Topics

Add
Edit
Save
Save & New

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Delete
Close

2.2.2.8 Close Function

The "Close" button will exit any window or dialog that it is displayed on. This button is located on data entry screens, the Navigation toolbar and the Navigation Menu. Should you have new data displayed in the window you will be prompted to save before the screen is closed. The user may also cancel the close screen operation and continue working.

Related Topics

Add
Edit
Save
Save & New
Cancel
Delete

2.3 Setting Up Users & Security

SMART SCHEDULEMASTER SECURITY SETUP

STEP 1: SETTING UP TEAMS

Go to the menu **Tools & Options >> Company Setup >> Work Teams.** If the team does not exists, add it.

Example.

Operations Team (has all members of of the Operations Team as selected on their employee profile)
Operations Supervisor Team (When added under user group should have access to the Operations Team)

STEP 2: ADD USER GROUPS

Go to the menu **File >> Security Settings >> User Groups.** If the group does not exist, add it.

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Also select the **Work Teams** that this user group should have access to. This gives the supervisor of this group access to their employees

STEP 3: GROUP PERMISSIONS

Go to the menu **File >> Security Settings >> Group Permissions.** Since users maybe members of one or more groups, menu, branch and other access permission does not need to be set for each individual group. Ensure the basic security menu access groups are setup first as access rights can be compounded by adding users to one or more User Groups at the User List screen.

STEP 4: USER LISTS

Go to the menu **File >> Security Settings >> User List.** Add the employees login details. Username and login name are the same. Select the menu access group (eg. Supervisors Menus which gives access to supervisor functions) and the Team access group (eg. Maintenance Supervisor which gives access to all maintenance employees)

STEP 5: UPDATING EMPLOYEE PROFILE

Go to the menu **Tools & Options >> Company Setup >> Employee Listing.**

Edit the record and place the employee on their team. Supervisors and Manager should be on a separate team. See step 1 example

NOTE: If an employee that was already setup is replaced and a new employee takes over that position the Do step 4-5 only.

2.4 Setting Up Company Profile & Employees

Before you add employees, it is recommended that you set up your company information. This can be done at:

1. Go to menu TOOLS & OPTIONS >> COMPANY SETUP
   a. set up each item in this menu one by one. The most important ones are DEPARTMENTS, JOB TITLES and WORK TEAM (or PAYROLL CATEGORY)

NOTE: If you are using SMART Staff HRMIS, Simply use the Synchronize utility to setup these data elements.

2. After set up, go to TOOLS & OPTIONS >> COMPANY SETUP >> EMPLOYEE LISTING to add new employees.

NOTE: If you are using SMART Staff HRMIS, Simply use the Synchronize utility to

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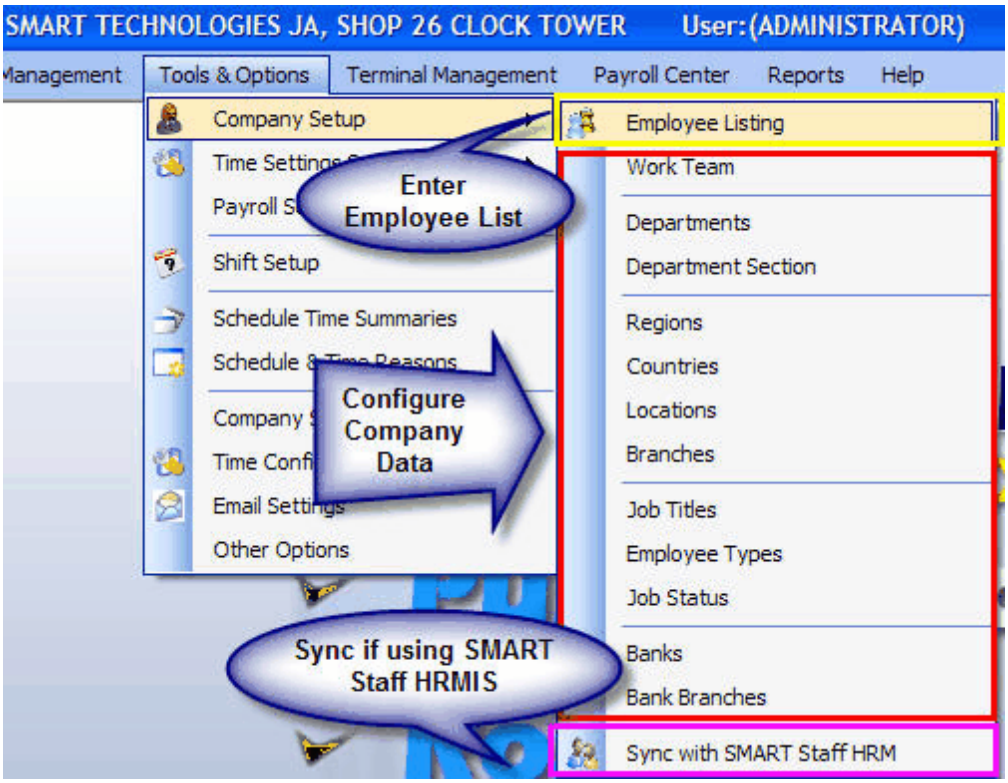
up the employee listing.



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How to register employee on time clock (Quick Register)

1. Go to menu TERMINAL MANAGEMENT >> AUTO REGISTER USERS
2. Where it says “REGISTER USERS ON TERMINAL”, select the TIME CLOCK you wish to register the person on
3. NOTE; Select the appropriate filters to ensure the wrong persons are not registered to the wrong clocks. WARNING: THIS IS TEDIOUS TO UNDO!
4. After filtering, choose the “SELECT ALL SELECTED” option if the USE column is not ticked for each employee.
5. Press the “AUTO REGISTER SELECTED EMPLOYEES TO TERMINAL” button to confirm and wait until done. Process should complete without error. After the update is complete, the system will ask if you wish the print the Terminal Register report for manual entry of fingerprints on the biometric machine. You can select No and print this at a later time.

Printing register report to enroll fingerprints manually

1. Go to menu REPORTS >> TERMINAL MGMT >> TERMINAL USER REGISTER
2. Select a specific terminal or the “SHOW ALL” option to print register for all clocks
3. Press the “SHOW REPORT” button to preview. When ready to print select the PRINT button on the toolbar above the report.

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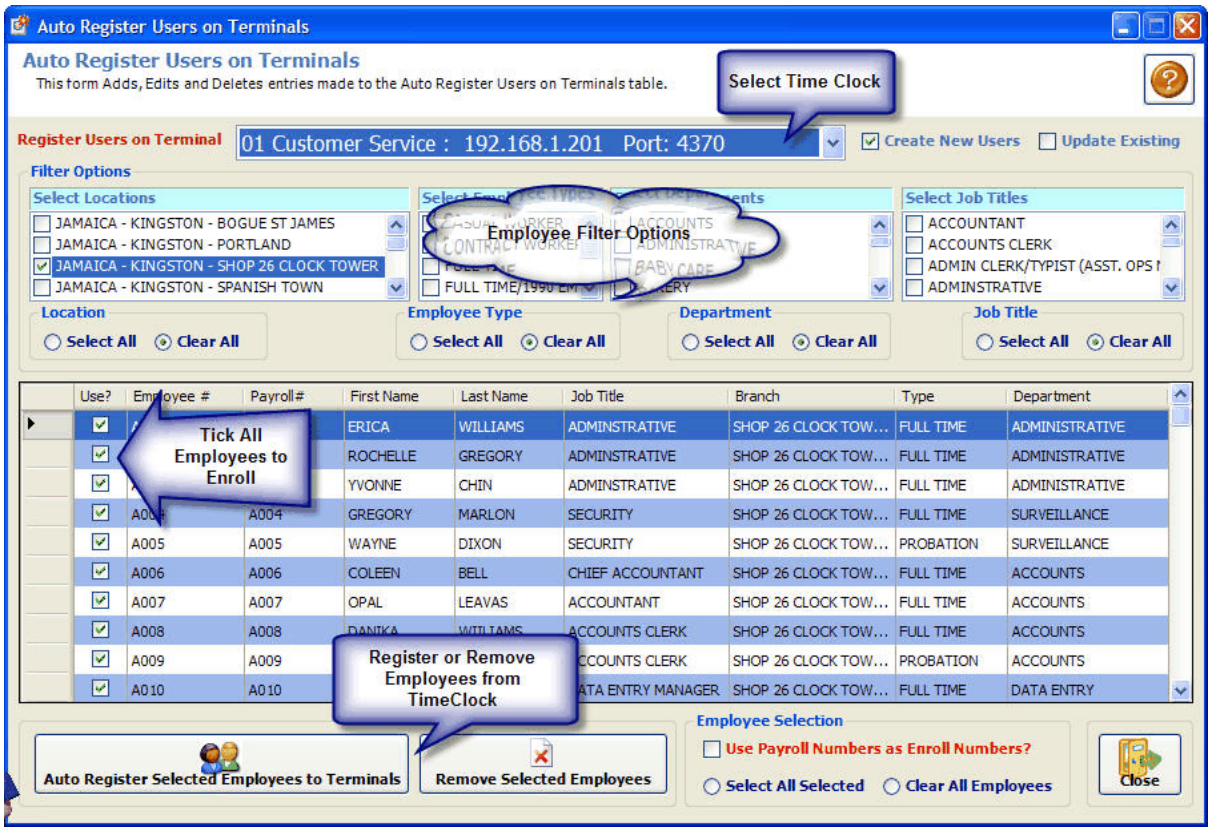

How to Register fingerprint Electronically via Software

1. Go to menu TERMINAL MANAGEMENT >> MANAGE USER PROFILES
2. From the list of Terminals, select the Time Clock the user is assigned to
3. From the list of users in the employee list, highlight the name of the employee
4. Click the Access Management tab.
5. Click the button Enroll User Fingerprint
   a. Use Enroll by Sensor if you are using a USB Enroller
   b. Use Enroll by Device if you are using the designated TimeClock
6. Follow the on screen instructions to complete the process

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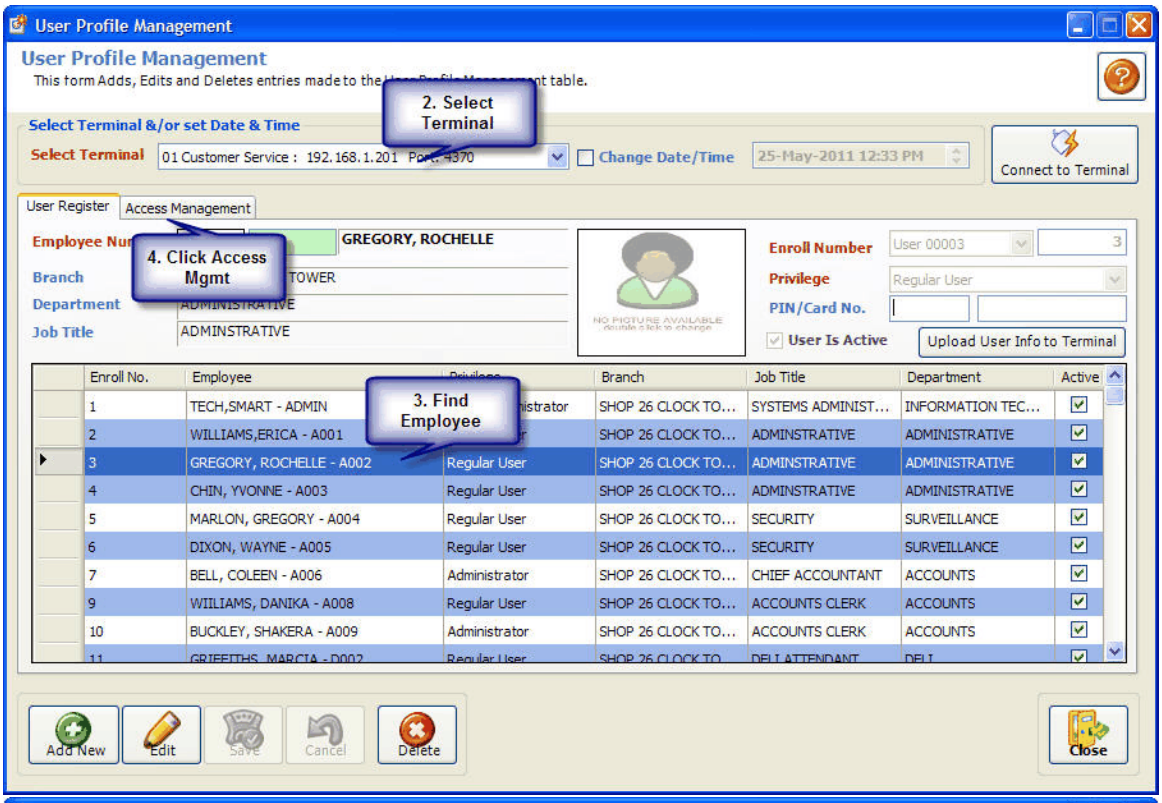
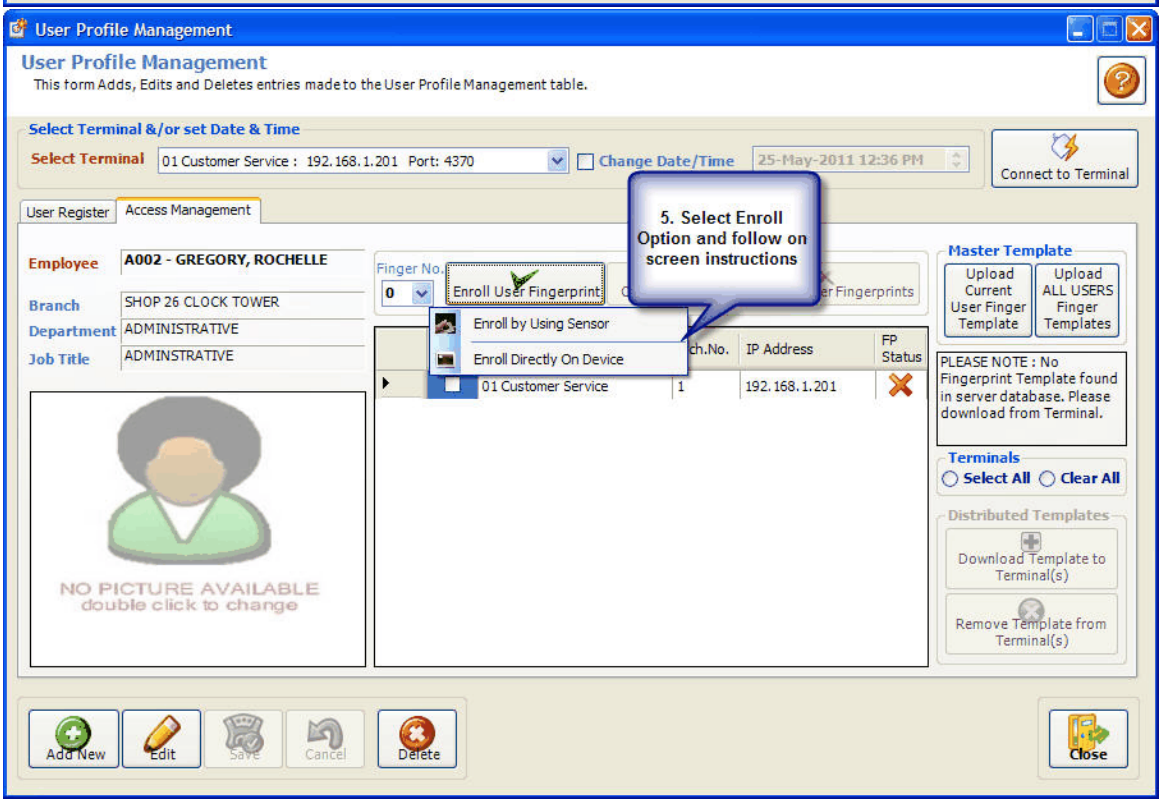

User Profile Management
User Profile Management
This form Adds, Edits and Deletes entries made to the User Profile Management table.
2. Select Terminal
Select Terminal &/or set Date & Time
Select Terminal
01 Customer Service : 192.168.1.201 Port: 4370
Change Date/Time
25-May-2011 12:33 PM
Connect to Terminal
User Register
Access Management
4. Click Access Mgmt
Employee Nu
GREGORY, ROCHELLE
Branch
TOWER
Department
ADMINISTRATIVE
Job Title
ADMINSTRATIVE
Enroll Number
User 00003
Privilege
Regular User
PIN/Card No.
User Is Active
Upload User Info to Terminal
3. Find Employee
Enroll No.
Employee
Branch
Job Title
Department
Active
1 TECH,SMART - ADMIN SHOP 26 CLOCK TO... SYSTEMS ADMINIST... INFORMATION TEC...
2 WILLIAMS,ERICA - A001 SHOP 26 CLOCK TO... ADMINSTRATIVE ADMINISTRATIVE
3 GREGORY, ROCHELLE - A002 Regular User SHOP 26 CLOCK TO... ADMINSTRATIVE ADMINISTRATIVE
4 CHIN, YVONNE - A003 Regular User SHOP 26 CLOCK TO... ADMINSTRATIVE ADMINISTRATIVE
5 MARLON, GREGORY - A004 Regular User SHOP 26 CLOCK TO... SECURITY SURVEILLANCE
6 DIXON, WAYNE - A005 Regular User SHOP 26 CLOCK TO... SECURITY SURVEILLANCE
7 BELL, COLEEN - A006 Administrator SHOP 26 CLOCK TO... CHIEF ACCOUNTANT ACCOUNTS
9 WIILIAMS, DANIKA - A008 Regular User SHOP 26 CLOCK TO... ACCOUNTS CLERK ACCOUNTS
10 BUCKLEY, SHAKERA - A009 Administrator SHOP 26 CLOCK TO... ACCOUNTS CLERK ACCOUNTS
Add New
Edit
Save
Cancel
Delete
Close


User Profile Management
User Profile Management
This form Adds, Edits and Deletes entries made to the User Profile Management table.
Select Terminal &/or set Date & Time
Select Terminal
01 Customer Service : 192.168.1.201 Port: 4370
Change Date/Time
25-May-2011 12:36 PM
Connect to Terminal
User Register
Access Management
5. Select Enroll Option and follow on screen instructions
Employee
A002 - GREGORY, ROCHELLE
Branch
SHOP 26 CLOCK TOWER
Department
ADMINISTRATIVE
Job Title
ADMINSTRATIVE
Finger No.
0
Enroll User Fingerprint
Fingerprints
Enroll by Using Sensor
Enroll Directly On Device
IP Address
FP Status
01 Customer Service
1
192.168.1.201
NO PICTURE AVAILABLE
double click to change
Master Template
Upload Current User Finger Template
Upload ALL USERS Finger Templates
PLEASE NOTE : No Fingerprint Template found in server database. Please download from Terminal.
Terminals
Select All
Clear All
Distributed Templates
Download Template to Terminal(s)
Remove Template from Terminal(s)
Add New
Edit
Save
Cancel
Delete
Close

HOW TO ENROLL FINGERPRINTS MANUALLY ON CLOCK (BLACK & WHITE SCREEN)

Please follow these instructions exactly

1. On the unit press MENU then press the number ONE (1)
2. Press OK, then enter 1234 (default password), then press OK
3. With the arrow pointing on USER MANAGE, press OK
4. With the arrow pointing on ENROLL USER, press OK
5. With the arrow pointing on ENROLL FP, press OK (FP means fingerprint)
6. The unit will now ask if it is a “NEW ENROLL”, press ESC for NO
7. On the sheet provided, look up the name of the staff whose fingerprint you want to enroll and pick up the ENROLL No. to the left of the name.
8. Enter the ENROLL No., then press OK
9. Place the employee’s middle finger of right or left hand (whichever they use), flat on the surface of the scanner avoiding the TIP of the finger. This is to be done three times.
10. Afterwards, press OK to save. If the scan wasn’t scanned properly, the unit will try and scan three more times to get good quality fingerprints.
11. When completed, the unit will ask if “BACK UP ENROLL CONTINUE?” this is to enroll another staff member. If yes, press OK and resume from step 7.
12. Otherwise, press ESC one or more times to exit to the menu option and go to the main screen where the clocks time is displayed.

HOW TO ENROLL FINGERPRINTS MANUALLY ON CLOCK (COLOR SCREEN)

Please follow these instructions exactly

1. On the unit press MENU then press the number ONE (1), then ENTER/OK
2. Enter 1234 (default password), then press ENTER/OK

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3. With the arrow buttons select USER MNG, then press ENTER/OK
4. With the arrow buttons select MANAGE, then press ENTER/OK
5. Press Zero (0) to bring up the search box. On the Terminal User Register report, look up the name of the employee whose fingerprint you want to enroll and enter the ENROLL NO to the left of the name, then press ENTER/OK
6. Using the arrow buttons Ensure ENROLL FP (FP means fingerprint) is highlighted, then press ENTER/OK
7. The unit will now ask if it is a “NEW ENROLL”, press ESC for NO
8. Place the employee’s middle finger of right or left hand (whichever they use), flat on the surface of the scanner avoiding the TIP of the finger. This is to be done three times.
9. Press the ESC button twice then press ENTER/OK to save. If the scan wasn’t scanned properly, the unit will try and scan three more times to get good quality fingerprints.
10. To enroll another employee directly after, resume from step 5.
11. Otherwise, press ESC one or more times to exit to the menu option and go to the main screen where the clocks time is displayed.

2.5 Time Management Configurations

Enter topic text here.

2.5.1 Shift & Scheduling Options Setup

Enter topic text here.

2.5.2 Time Calculation Options

Enter topic text here.

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2.6 Meal Management Configurations

Before you can use the Meal Management Module, a number of parameters need to be setup. The Meal Management module accommodates two working scenarios. These are:

OPEN CANTEEN SYSTEM

The open canteen system is on where a menu is provided and employees may have any item on the menu without pay. All that is done is that a record is kept of each date (or sometimes time) the employee is issued a meal. The total is tallied and used to do a payout.

MEAL BENEFIT ALLOWANCE SYSTEM

When employees received a benefit amount that has a value this system is used. Employee's accounts are topped up at intervals and the employees charge their account for meals until the amount is depleted. The amounts can be refresh with an overall new amount or an accumulated amount.

For an Open Canteen these parameters include:

1. Employee Module Setup
2. Meal Rules Setup
3. Assign Employee Team (if required as teams maybe already set on employee's profiles)

For Allowance Benefit Distribution these parameters include:

1. Employee Module Setup
2. Assign Employee Team (if required as teams maybe already set on employee's profiles)
3. Holidays Setup
4. Meal Allowance Setup

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5. Product Category list
6. Product Item list

2.7 Tutorial: Updating Schedules & Timesheets

PAYROLL TIMESHEET CHECKLIST

To ensure your timesheet is complete and ready for payroll, please ensure the following checklist items are complete.

Complete your Schedule for the current pay period for all employees under your supervision.

Go to *Produce "Timesheet Report"* menu, *"Calculate Timesheet"* and then click the *"Adjust Timesheet"* button.

Ensure all shifts are correct (sometimes employee's switch. If so amend the Schedule), fix all incomplete timesheets by using the override time and approve extra or overtime if any. Repeat as needed for each employee.

Sign Off your current pay period, print the

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"*Period Timesheet Summary*" report, sign and submit to the payroll administrator.

CREATING SCHEDULES

1. On the Scheduling menu, select New Schedule
2. Select a Schedule Type.
   a. **Static Schedule**
      A static schedule as a defined Start and End Date such as: January 1 2011 to January 30, 2011.
   b. **Rotation Schedule**
      A rotation schedule is one that has a defined number of weeks such as 1, 2, 3, 4 etc. When the last week has passed, the schedule restarts at week one and the cycle repeats.
3. Enter a Title or Name of the schedule. Use your department name and the date period description to easily identify the schedule later. Eg. "Operations Schedule June1-15". An optional password maybe entered to prevent others from opening and editing your schedule.
4. Select a Start and End Date for the duration of the schedule
5. Press the Save & Close button, keep or change the filename for your schedule, select the folder or drive where you wish to save it and press Save.

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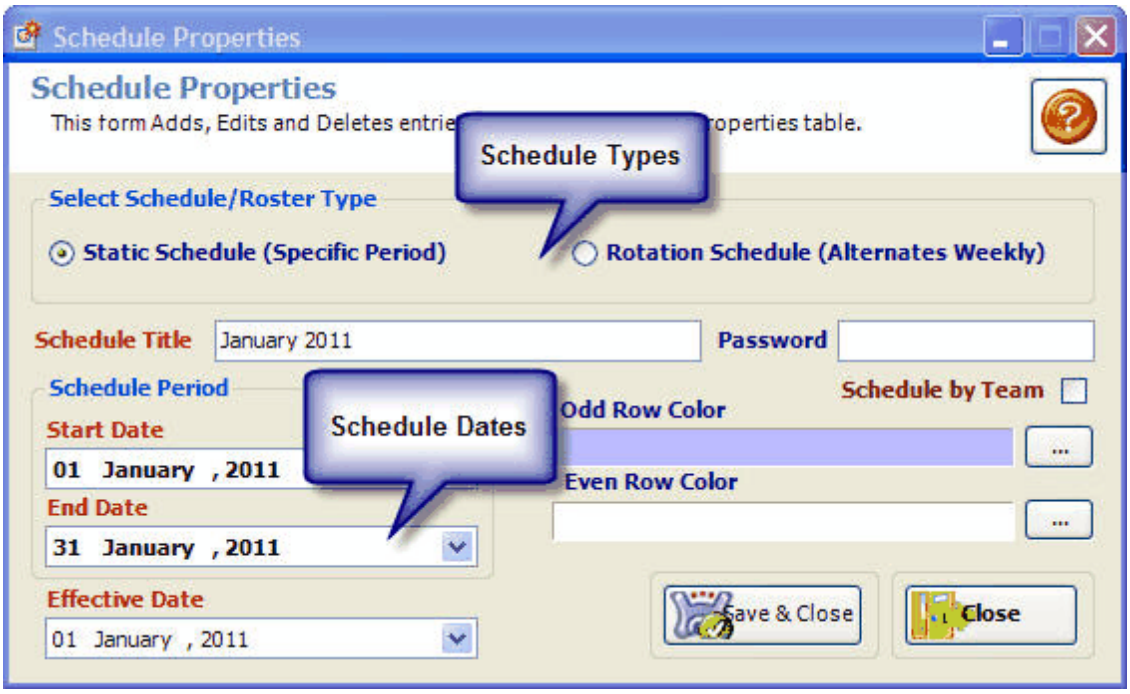
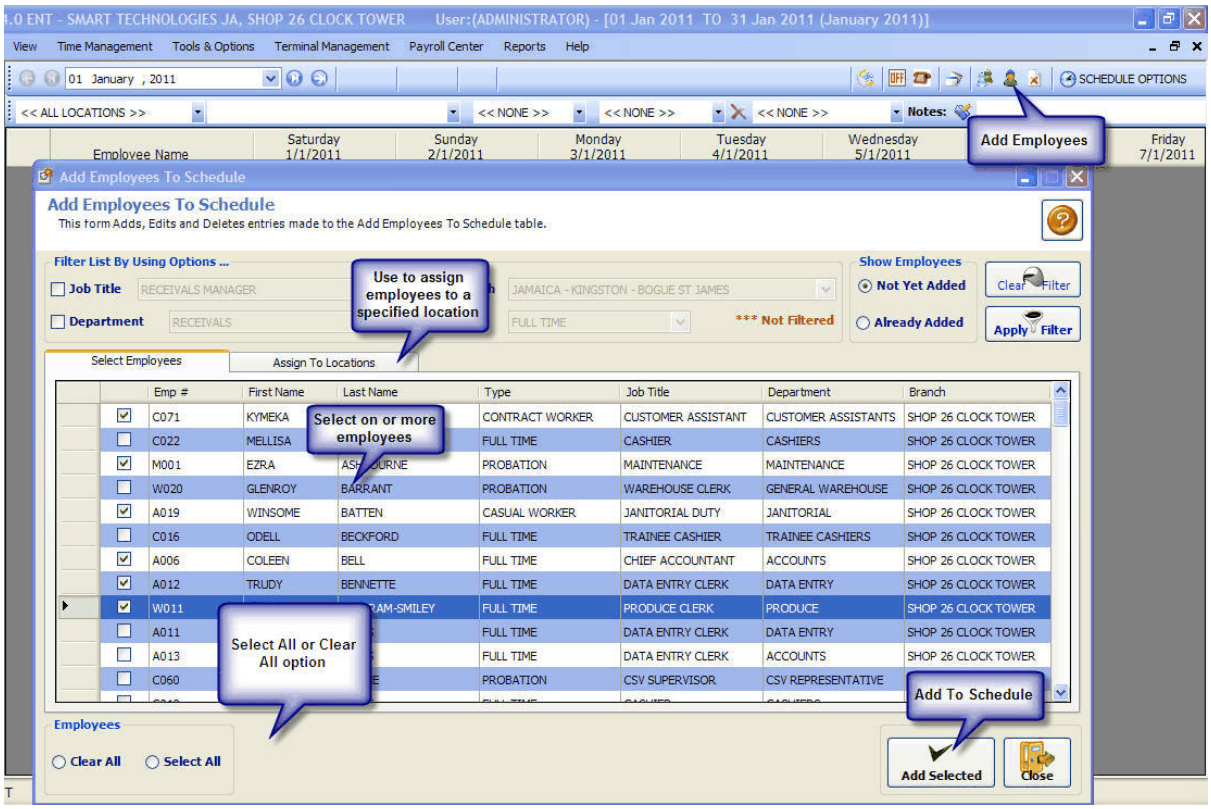
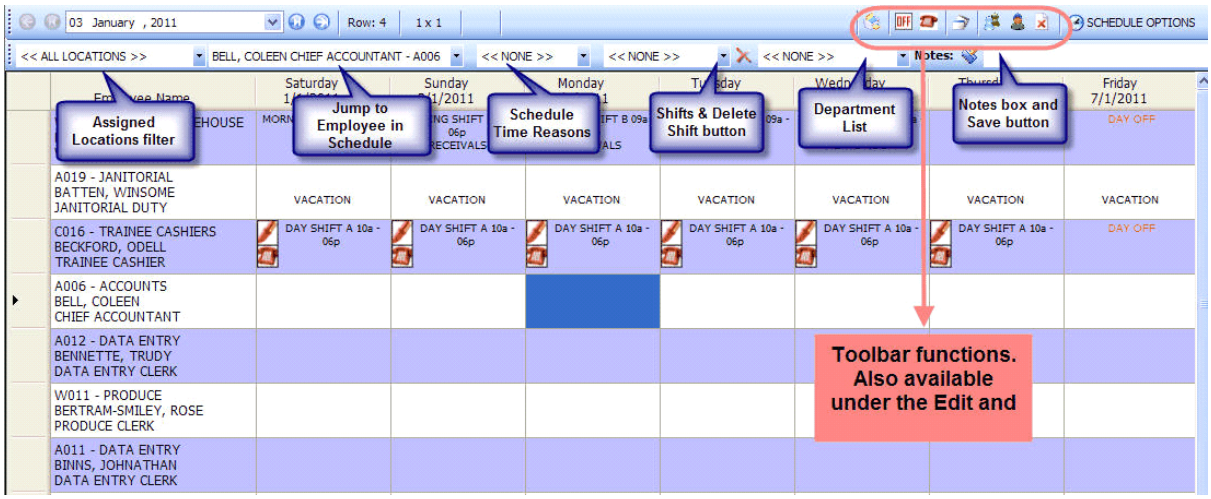

Schedule Properties
Schedule Properties
This form Adds, Edits and Deletes entrie
roperties table.
Schedule Types
Select Schedule/Roster Type
Static Schedule (Specific Period)
Rotation Schedule (Alternates Weekly)
Schedule Title
January 2011
Password
Schedule Period
Schedule by Team
Schedule Dates
Odd Row Color
Start Date
01 January , 2011
Even Row Color
End Date
31 January , 2011
Effective Date
01 January , 2011
Save & Close
Close

Adding Employees to Schedule

1. When a new schedule is created, the employee list will appear or on the toolbar press the Add Employee button or go to the Edit menu and select Add Employee(s)
2. Select the employees by ticking the boxes in the first column of the list of use the Select All option located at the bottom of the screen.
3. If the employee list is very long, you may use the filter options at the top of the screen to reduce the employee list.
4. The Assign Locations tab allows you to specify which location/branch the employees should be listed other than their home location/branch. However, this is only used in special cases.





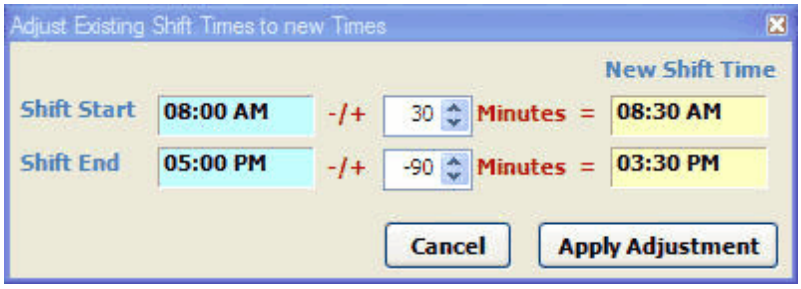
Updating your Schedule

All the options to update your schedule are located on the Edit and View menus. Some are summarized below.

1. Schedule Time Reasons
   a. Schedule reasons are notes as to why employees maybe absent. This maybe SICK or VACATION or any other reason entered by you. This list is updated under the Tools & Options menu

2. Shifts
   a. Shifts are prescribed Start and End times for employees to begin and end work. After a shift is selected, you have to use the Delete Shift button beside the Shift list to remove it before you can select a new one. The Shift list is updated under the Tools & Options menu.

3. Adjust Shift Times



   a. There may be a random change in shift times for a particular reason but it is not intended to be permanent. Select a shift that closely matches the time frame you desire then right click on the shift on the date schedule and select Adjust Shift times. Use the arrows to adjust start or end time

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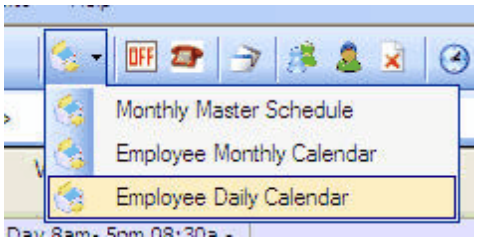
up and or down. When you are done click Apply Adjustment.

b. If one or more employees are on the adjust shift time, you can copy the Adjusted shift from one employee to another. To do this, right click on the adjust shift and select Copy Adjusted Shift. Select the other dates and employees and employees who will be on the adjusted shift, right click and Select Paste Adjusted Shift. If you want to cancel the copying process select Cancel Copy Shift.

4. Departments
   a. An employee may work in one department today and another tomorrow. In such instances you can select the name of the department of the list to specify. This list is updated under Company Setup on the Tools & Options menu.

5. Notes
   a. Using the notes box you can set reminder notes where an employee made a request or any other reason. After the note is entered you must press the Save Notes button to record the note.

6. Remove Employee
   a. Ensure the employee is selected and press the Remove Employee button on the toolbar or on the Edit menu.
7. Copying Schedules
   a. Under the Scheduling menu there is a Copy Existing Schedule option. This option allows a duplicate copy of a schedule to be done from one week (or period) to the next. Simple open the schedule you want to copy and select the Copy Existing Schedule and follow the steps.
8. Print Schedules



   a. After your schedule is complete you may print a copy to post for your staff to see. Simple select the print icon on the scheduling toolbar and select one of the schedule formats available to print.

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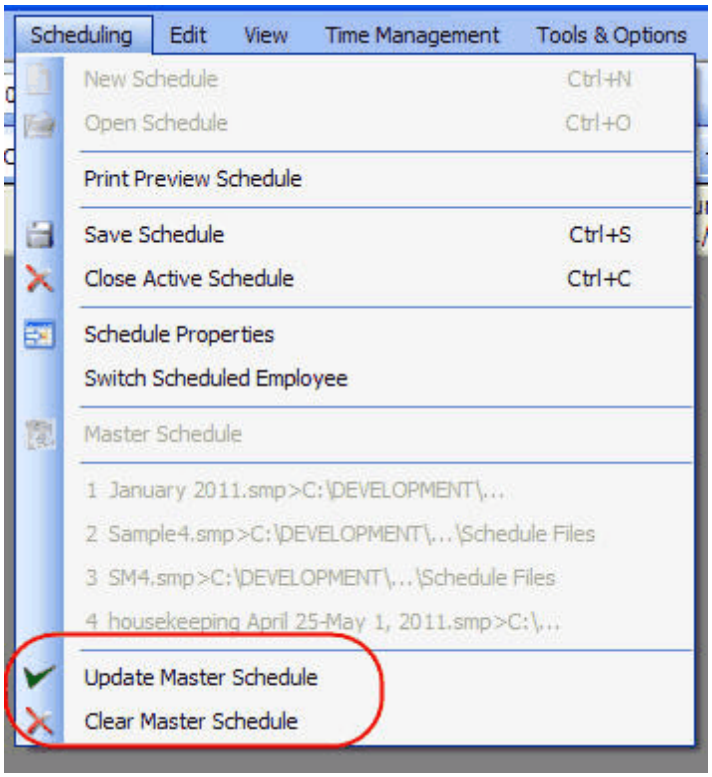
Making your Schedule Active

The Master Schedule is what is used to validate an employee's time/shift. After you have completed your schedule you should Update Master schedule so that the employee's shifts become active. Therefore the Master Schedule must be updated with all schedules.



1. As you make your updates remember to save. Under the Scheduling menu, select the Save Schedule option.
2. After your Schedule is completed you need to make it active. To do this, go to the Scheduling menu and select the Update Master Schedule option.
3. Alternately, you may remove all entries for your opened schedule from the Master Schedule by selected the Clear Master Schedule option.

Note: Updating or Clearing of the Master Schedule only makes changes based on matching data from the schedule you currently have opened.

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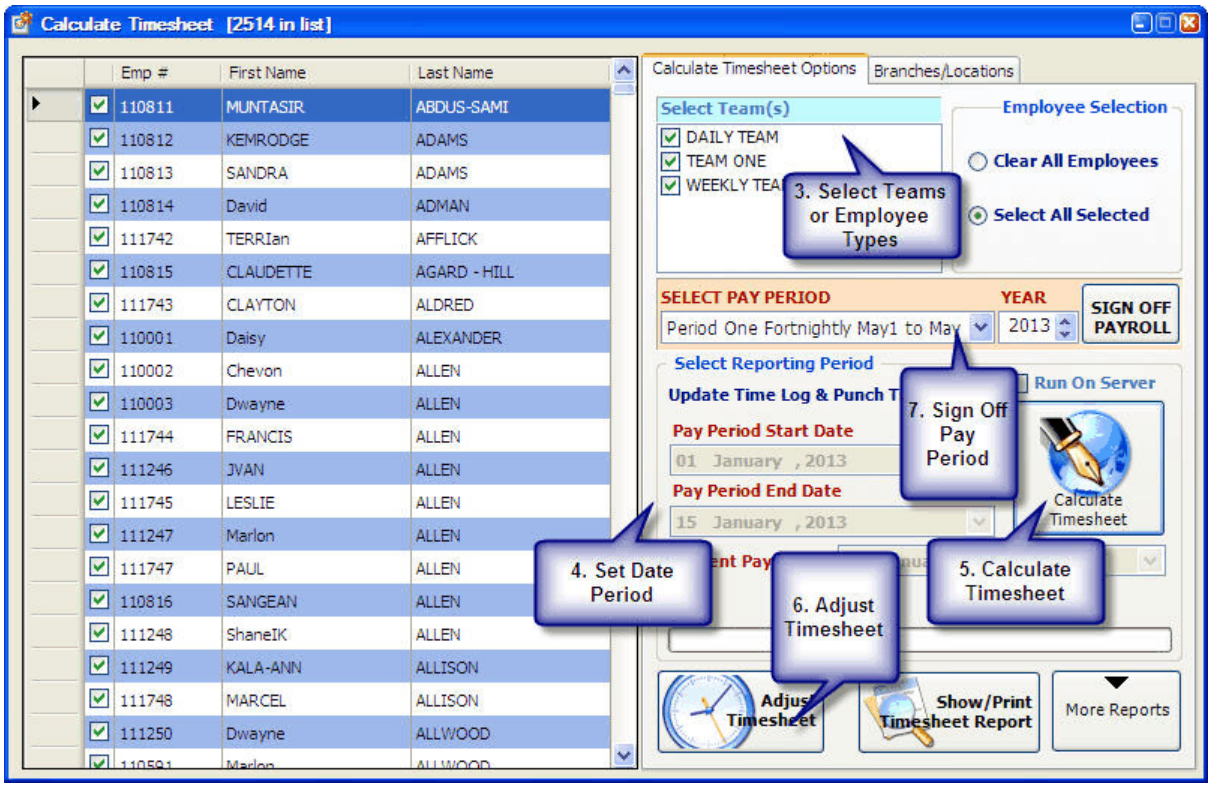
PRINTING TIME SHEETS

Timesheets are printed on a periodical basis by selecting a start and end date which outlines the period, e.g. Jan. 1, 2010. For accurate timesheet reports, processing of the timesheet data must be done first.

HOW TO PROCESS TIMESHEETS:

1. Login by entering your assigned username and password
2. Go to the following menu PAYROLL CENTRE >> PRODUCT TIMESHEET REPORT
3. Select the category of staff you want to produce by deselecting all the other EMPLOYEE TYPES
4. Set the Start and End dates to the period in which you want to process.
5. Then press the CALCULATE TIMESHEET button. This process might take a few minutes to complete but will prompt you once it's done.



ON THE SAME SCREEN

Show/Print Punch Log Report

This report displays all clocked in/out times needed for payroll or audit

More reports

This menu is a shortcut to other Timesheet Reports of varied formats. Some of these reports are also in the Reports menu under the TIME MANAGEMENT category.

Sign Off Payroll

After completing all schedules, incomplete timesheets, approving any overtime or other extra time, each supervisor needs to ensure their payroll data is processed. Do a final Calculate Timesheet action after all amendments are done and then click the SIGN OFF PAYROLL button. This will indicate to the payroll administrator that your timesheet is complete for the selected Pay Period and ready for processing. Note, after you have signed off the payroll you will be blocked from making any further changes to the pay period without the payroll administrator granting you access.

Some payroll administrators may require a printed signed copy of the pay hours for each employee. The ***Show/Print Punch Log Report*** will print a detailed day by day log of an employee's time. However, if this detail is not needed (as it is always in the system) a summary report may be printed. Go the ***More Reports*** option and select **"Period Timesheet Summary"**

Adjust Timesheet

The Adjust Timesheet option allows you to edit an employee's timesheet where errors are present or to approve excess time such as overtime or double.

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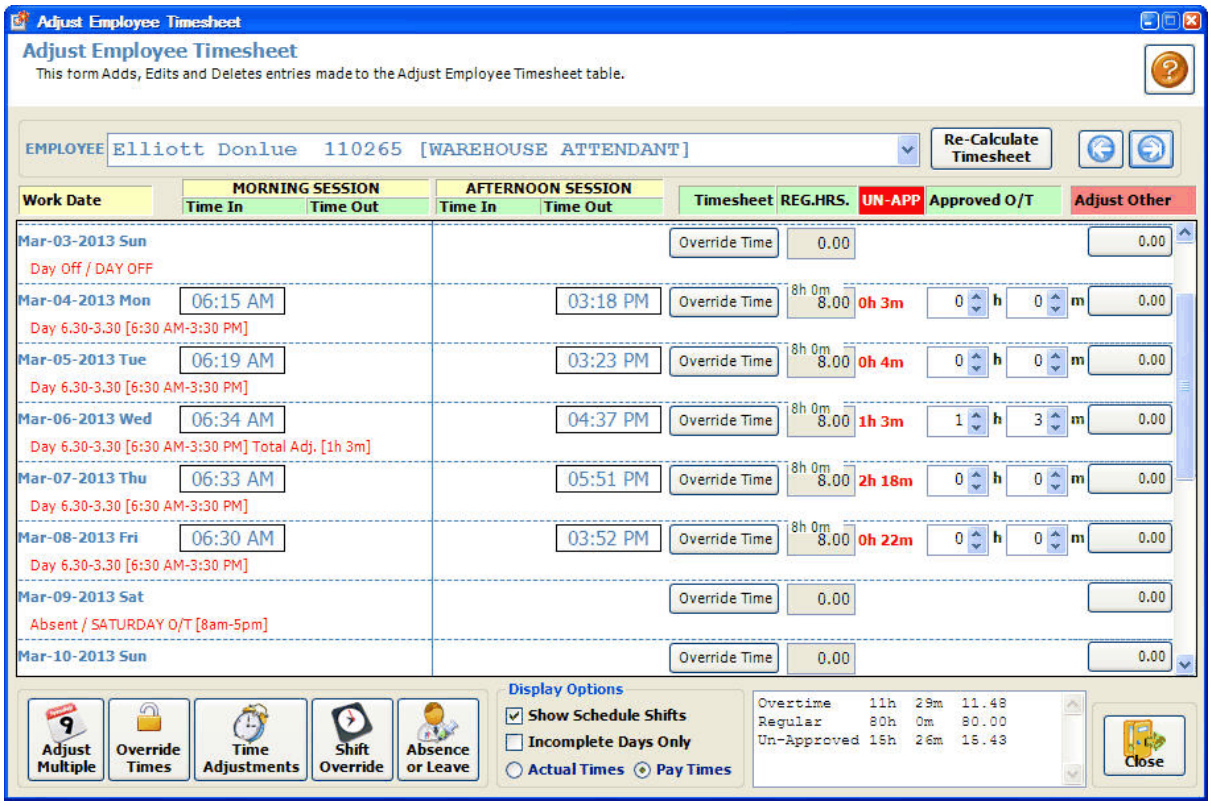

Note: *To approve overtime listed under the UN-APP column quickly, simply use the UP and DOWN arrows for the boxes under the Approved O/T column. You cannot approve more hours than the unapproved amounts. To approve other time types such as Double Time, Shift Premium etc. use the buttons beside each date under the Adjust Other column.*

1. Adjust Timesheet - Adjust Multiple

There are some instances where employees are present and working but are not able to clock in such as bearers or drivers. The Adjust Multiple feature allows Start and End times to be entered for more than one day automatically. Simply set the Start and End dates, In and Out times and click the Auto Populate Timesheet button. Be sure to avoid entering duplicates.

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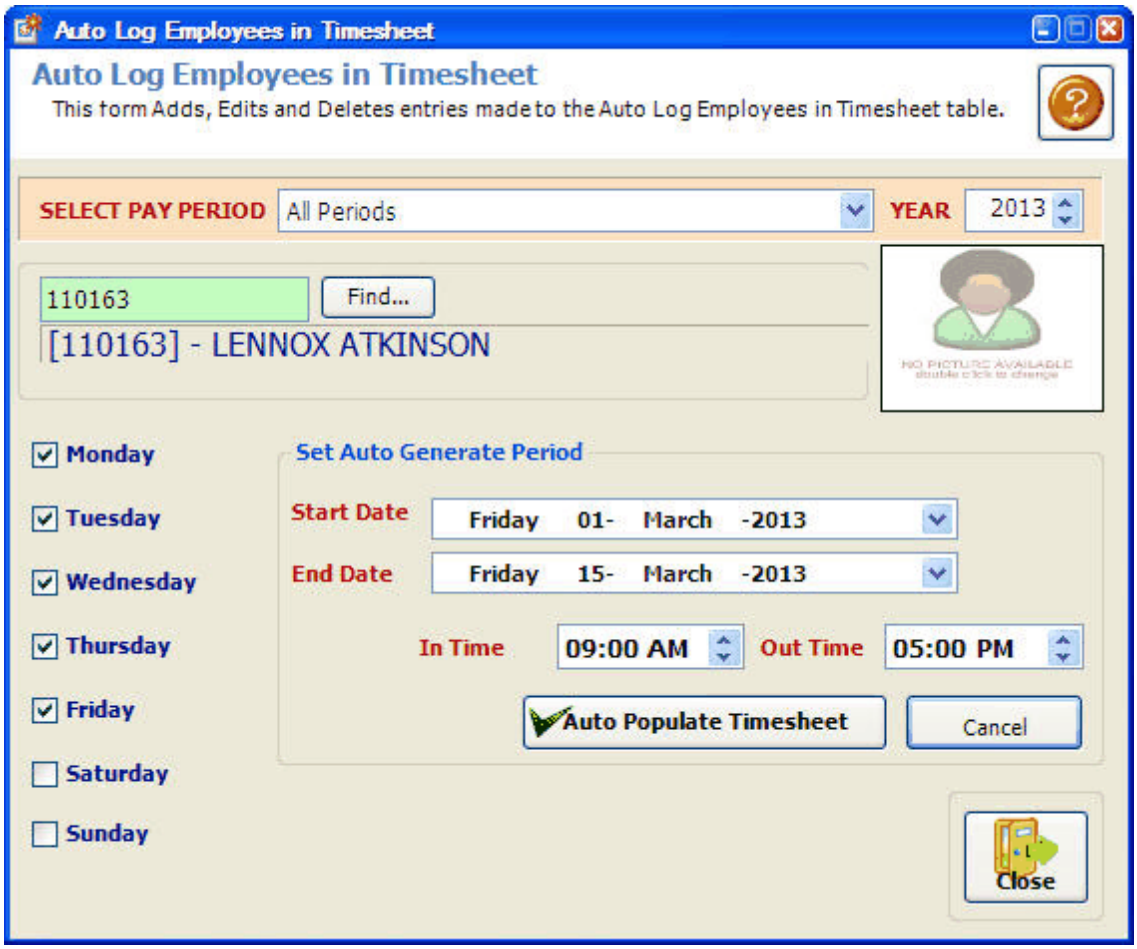
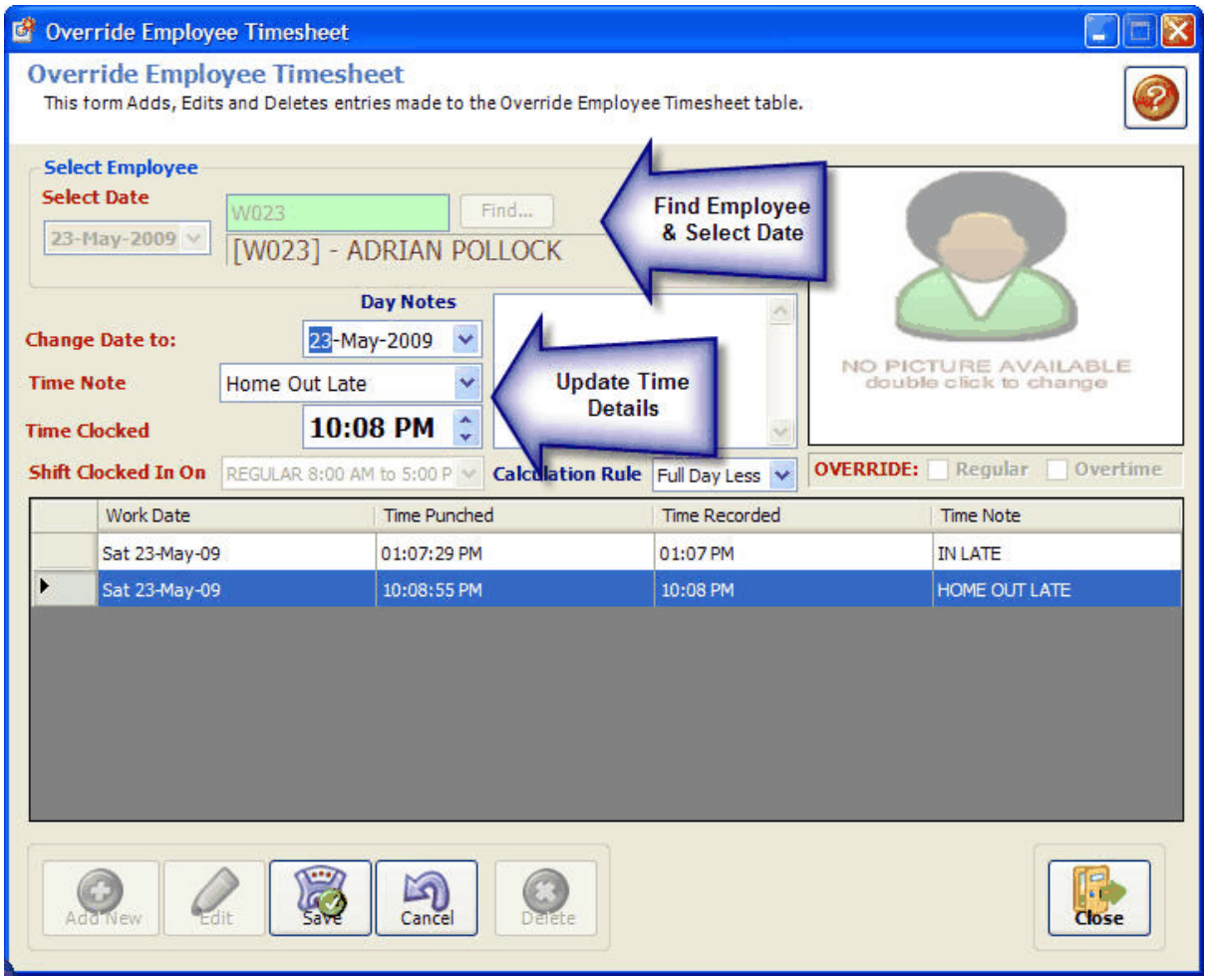

Auto Log Employees in Timesheet
Auto Log Employees in Timesheet
This form Adds, Edits and Deletes entries made to the Auto Log Employees in Timesheet table.
SELECT PAY PERIOD
All Periods
YEAR
2013
110163
Find...
[110163] - LENNOX ATKINSON
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday
Set Auto Generate Period
Start Date
Friday 01- March -2013
End Date
Friday 15- March -2013
In Time
09:00 AM
Out Time
05:00 PM
Auto Populate Timesheet
Cancel
Close

2. Adjust Timesheet - Override Times

FIXING ERRORS ON EMPLOYEE TIMESHEETS



How to add a missing time: i.e. Employee didn't clock in or out

a. Click the Override Time button
b. Press the ADD NEW button and fill out the necessary details then save
c. Repeat steps to add other times to the employee record

How to change an existing entry

a. Click the Override Time button
b. Then in the list of times at the bottom of the screen, select the time to change
c. Press the EDIT button, adjust the details on the screen and then press the

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SAVE button.

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How to delete an existing entry

a. Click the Override Time button
b. Then in the list of times at the bottom of the screen select the time to change
c. Press the DELETE button, select YES to confirm deletion

3. Adjust Timesheet - Time Adjustments (Approved O/T, Adjust Other)

Time Adjustments are any adjustments outside of regular and approved overtime/double time etc. If the employee works any excess hours that are unapproved, this feature will allow the supervisor to pay the employee a portion or all of the excess time.

Adjustments are made using the same edit procedures as outlined in at Override Time Section 2.

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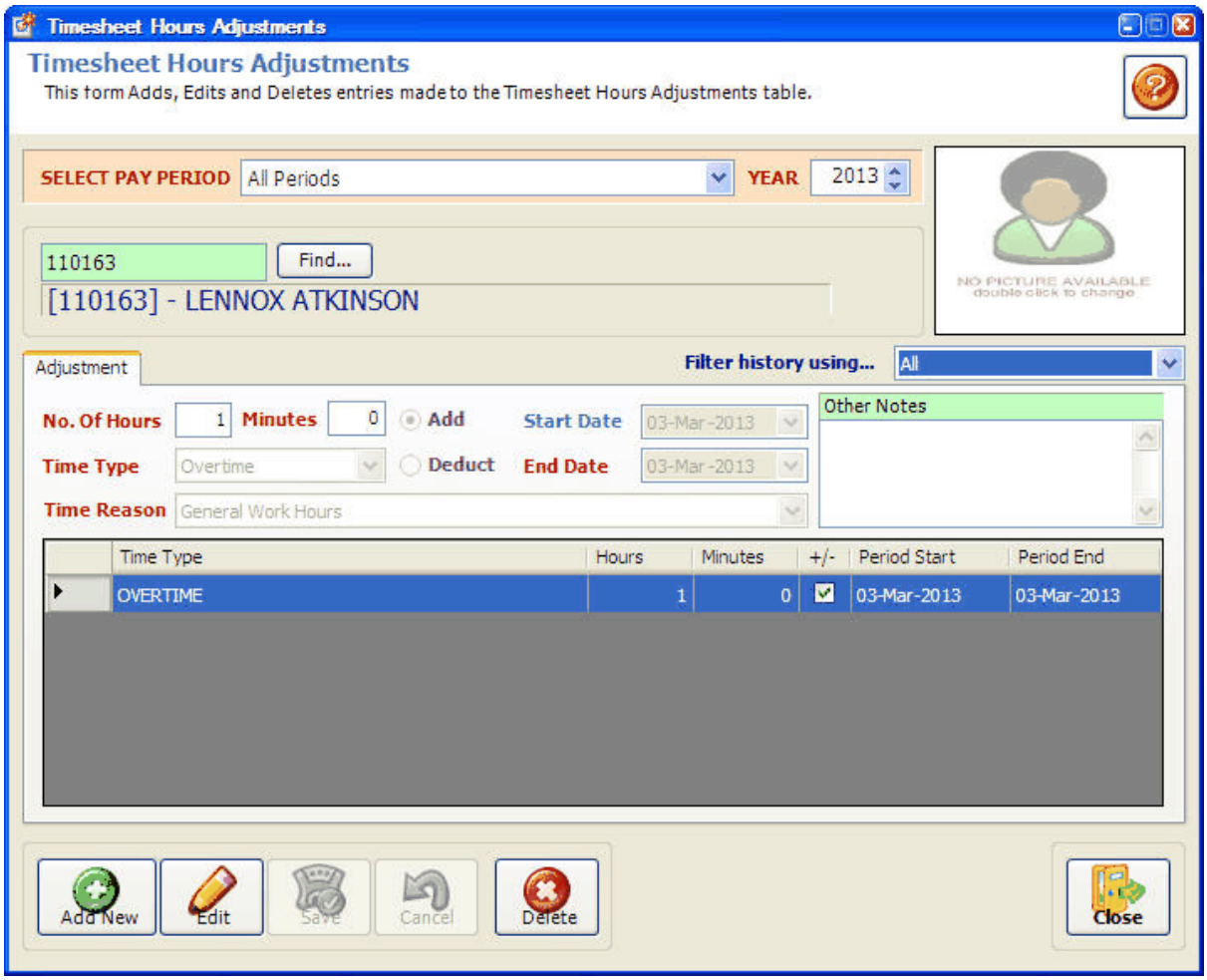
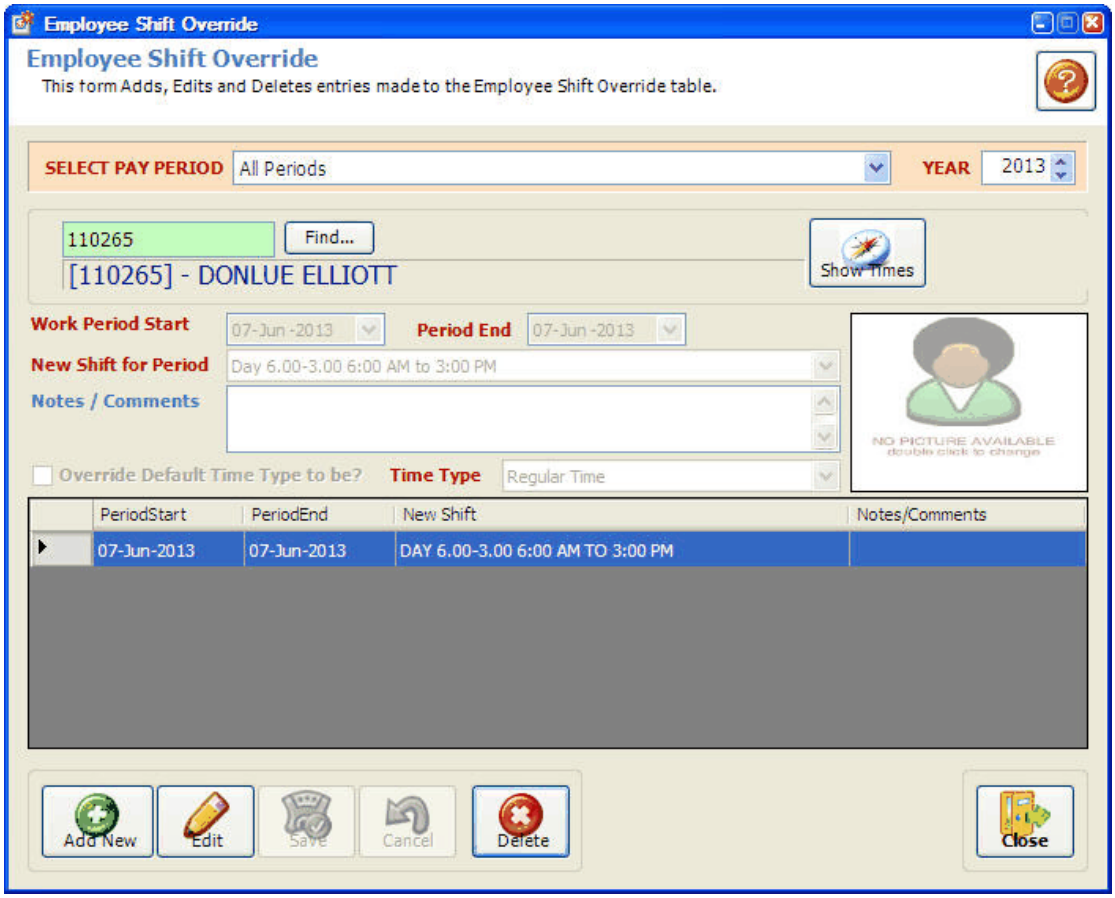

Timesheet Hours Adjustments
Timesheet Hours Adjustments
This form Adds, Edits and Deletes entries made to the Timesheet Hours Adjustments table.
SELECT PAY PERIOD
All Periods
YEAR
2013
110163
Find...
[110163] - LENNOX ATKINSON
NO PICTURE AVAILABLE
double click to change
Adjustment
Filter history using...
All
No. Of Hours
1
Minutes
0
Add
Start Date
03-Mar-2013
Time Type
Overtime
Deduct
End Date
03-Mar-2013
Time Reason
General Work Hours
Other Notes
Time Type
Hours
Minutes
+/-
Period Start
Period End
OVERTIME
1
0
03-Mar-2013
03-Mar-2013
Add New
Edit
Save
Cancel
Delete
Close

4. Adjust Timesheet - Shift Override

The Shift Override function is primarily used to make changes to an employee schedule where the employee has a fixed time every week. Adding a shift in the shift override screen for the particular date period will change the employee schedule for that date period only. After the period has passed the employee returns to their regular schedule that is setup in the system by a rotation schedule or the employee's default shift listed on the employee's profile screen.

Note: Changes to shift for employees who are rostered weekly should be done within the Schedule and not using the Shift Override.



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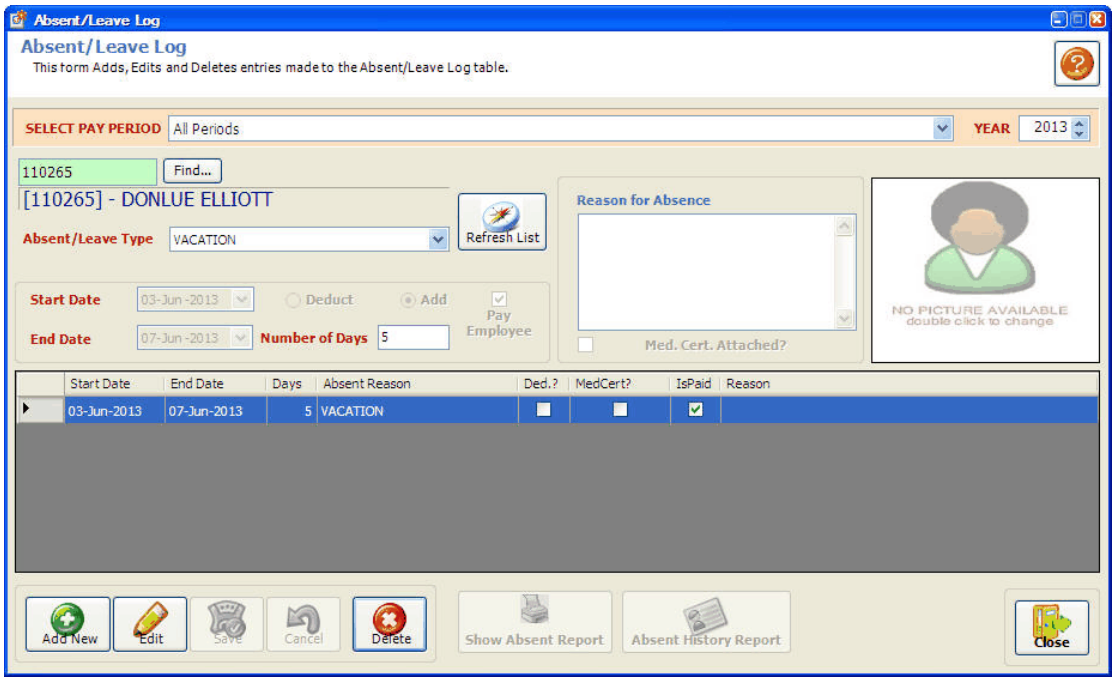
5. Adjust Timesheet - Absence or Leave

Entry in the Absence or Leave log screen allows employees to be paid for time off such as sick day, vacation etc. In many cases the Human Resources department handles these entries so this option is often disabled. However, if enabled, select the Absent/Leave Type and then add the details for the time off and save.

Absence or Leave log adjustments are made using the same edit procedures as outlined in at Override Time Section 2.



6. Adjust Timesheet - Show Schedule Shifts

This is a display option only! When this option is selected, the shift that is scheduled for the employee will show beside each day for the pay period so it is easier to identify the adjustments that are needed.

7. Adjust Timesheet - Incomplete Days Only

This is a display option only! This option will filter the employee list to show only those who have incomplete time data. This is use in quickly finding

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missed punches.

8. Adjust Timesheet - Actual vs. Pay Times

This is a display option only! The system logs two times based on the setting setup by the administrator. Actual times will show the actual time the employee went to the Time Clock. Pay times will show the adjusted actual time based on the employees shift. Eg. Actual Clock In-7:55AM Shift time is 8am-5pm, Pay Clocked In time is 8am to match shift start time.

HOW TO PRINT OTHER TIMESHEET REPORTS

After processing the timesheets for the specified period you can print one or more timesheet reports. These are:

1. Attendance Report Summary
   - Go to the following menu REPORTS >>TIME MANAGEMENT >>ATTENDANCE LATE REPORT SUMMARY
   - Select the START and END DATES again and press the SHOW REPORT button

2. Attendance Report Detail
   - Go to the following menu REPORTS >> TIME MANAGEMENT >>ATTENDANCE REPORT DETAIL
   - Select the START and END DATES again and press the SHOW REPORT button

2.8 Tutorial: Exporting Hours to Payroll

Calculating & Exporting Times to Payroll

Note: it is advised that this function should only be used by a Payroll Administrator.

Confirming all departments have updated their timesheets you can process the timesheet data for payroll import.

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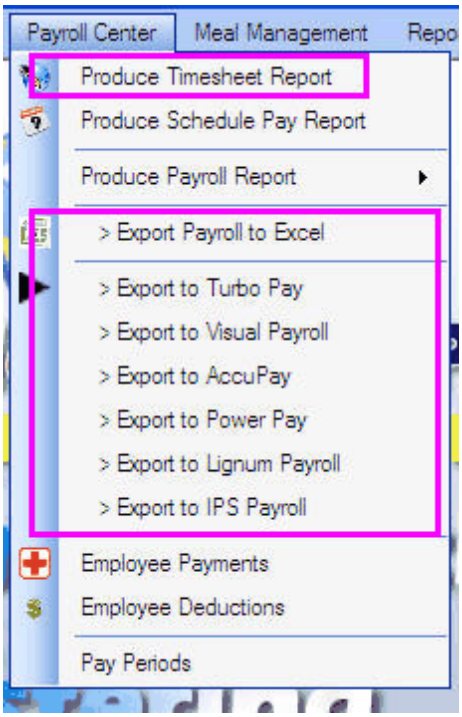

1. On the Payroll Centre menu, select Product Timesheet Report
2. Select the Teams, Employees and or Locations you are processing data for.
3. Set the start and end dates for the pay period you are processing.
4. Press the Calculate Timesheet button.
5. After this is complete, go back to the Payroll Centre menu and select Export to Turbo, Power Pay, IPS, Lignum or Accupay payrolls (select the one you have)
6. At the Top of the Screen select the Payroll Name as their maybe more than one available. For some payrolls like IPS that option will not be available so go to step 7.
7. There is not need at this point to select the Teams, Employees or Locations as the list is already filtered by your previous selection. Enter any required information. If some cases to data entry is required.
8. If available, ignore the Recalculate Punch Times option. Press Export, read instructions carefully and select YES to continue or not to Abort and make changes.

Note: If a payroll select option is available, ensure at all times the CORRECT PAYROLL is selected. Failing to do this you may dump garbage data into another payroll where you may have to spend hours deleting.

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2.9 Tutorial: Managing Master Schedule & Pay Periods

Administering the Master Schedule

Note: it is advised that this function should only be used by a Payroll Administrator.

On the Scheduling menu, select Master Schedule. Here you will see all active schedules updated by other users. Users can clear their individual schedules by selecting the Clear Master Schedule option under scheduling while they have their schedule open for editing.

However, the Payroll Administrator may clear any Schedule from the Master list as needed or requested. As a consequence, each user/department to name their schedules appropriately so they can be easily identified. Eg. **"DEPT NAME ROSTER JUN5-JUN10 2013"**

Managing Pay Periods

Note: it is advised that this function should only be used by a Payroll Administrator.

Pay periods allow for supervisors to edit the timesheet data as allowed by the payroll admin. Add a new pay period if one isn't already present. The payroll admin may choose to enter an extended pay period (for a month or year) or enter each fortnight or week. Enter each pay period will allow the closing of the period from further edits.

After timesheets have been processed, the payroll administrator may prevent any further editing of the data so as to prevent tampering.

If you wish to enable all periods instead of entering each individually, enter "ALL PAY PERIODS" as the description for the Period Description and Period Number 1. Enter an extended date period spanning a year or two. Give access to all users and all Pay Cycles.

1. On the Payroll Centre menu, select Pay Periods
2. On this screen Add New pay periods or edit existing pay periods.
3. You may edit and allow one or more users edit privileges by deselecting their name from the list. Pay Cycles also further filter only employees that begin to the listed Pay Cycles

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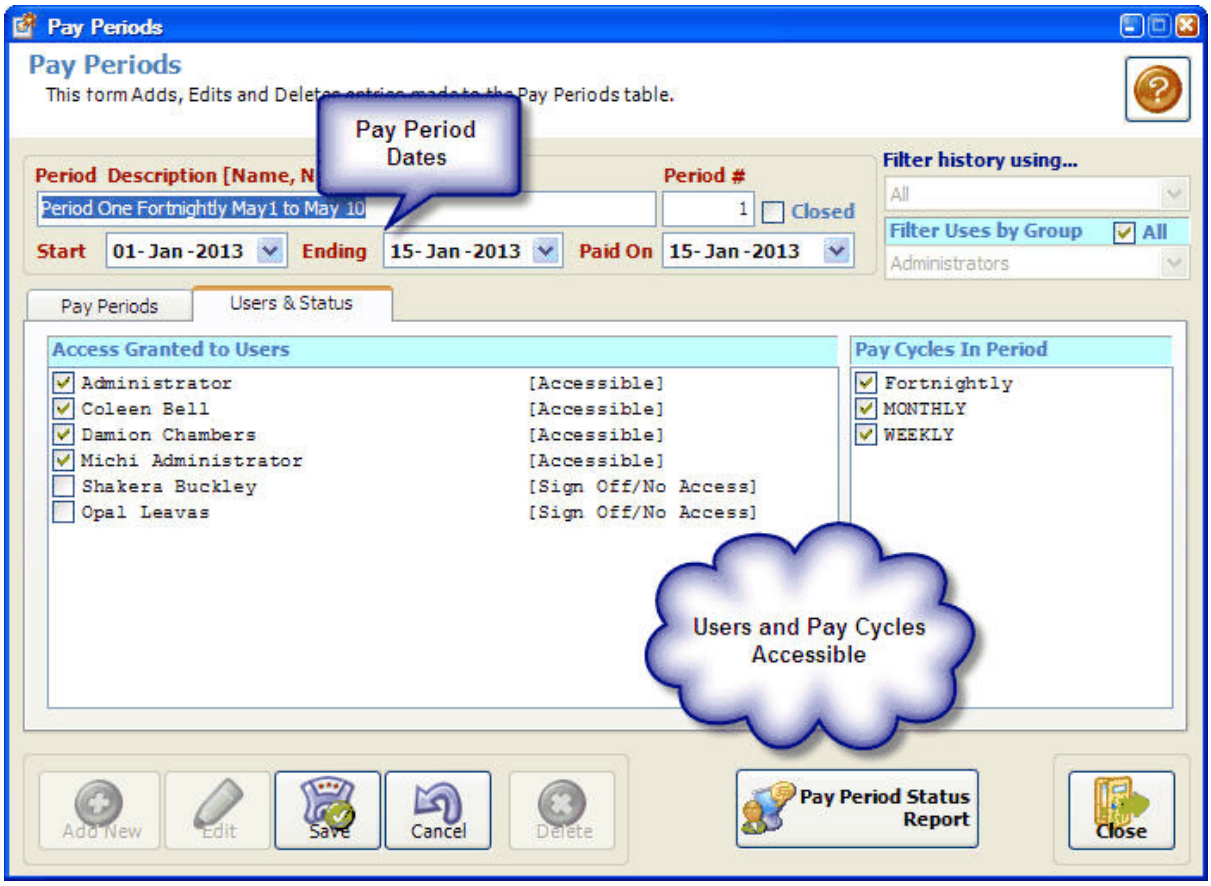
4. Save after you have completed the adjustments.



2.10 Tutorial: Separating or Deleting Employees

HOW TO DELETE/ARCHIVE EMPLOYEES

Employees maybe deleted from the Time Clock or made inactive.

1. Deleting Employees Fingerprint data
   a. On the Terminal Management menu, select Manage User Profiles
   b. From the list of Terminals, select the Time Clock the user is assigned to
   c. From the list of users in the employee list, highlight the name of the employee

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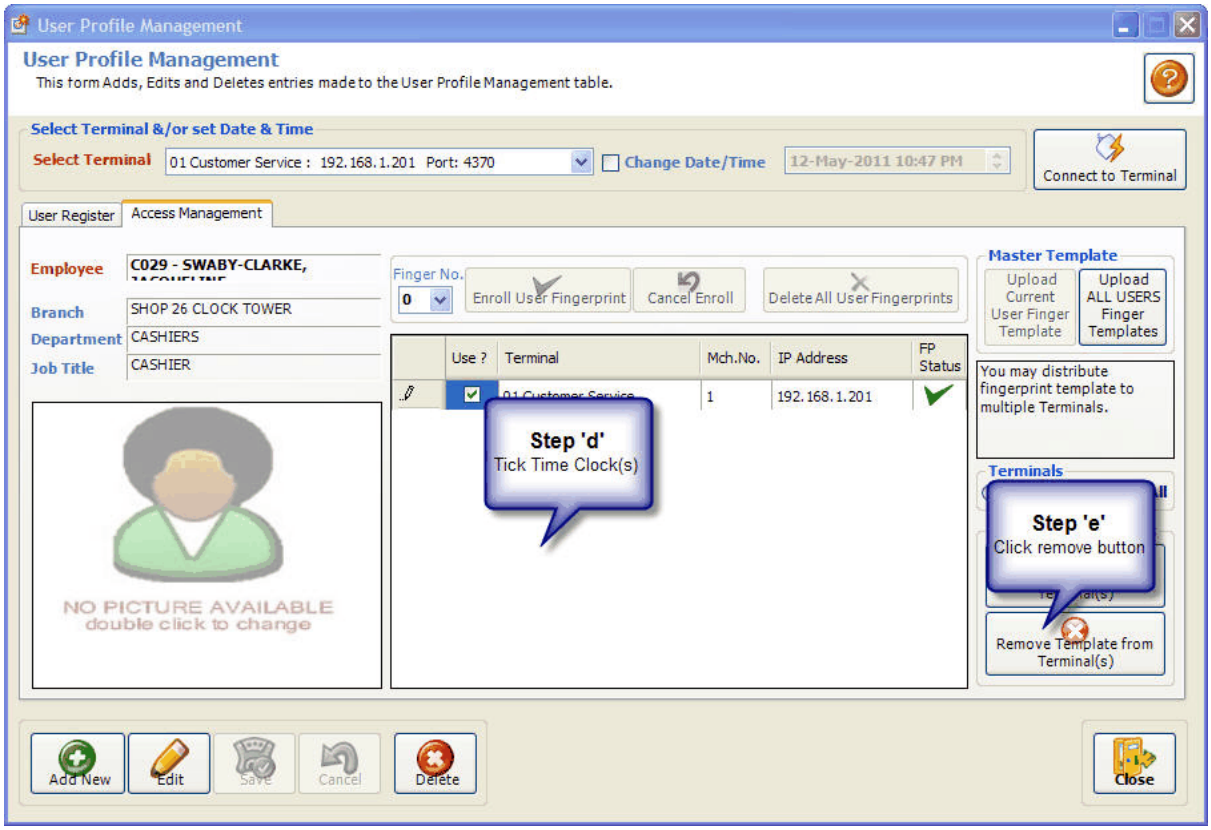
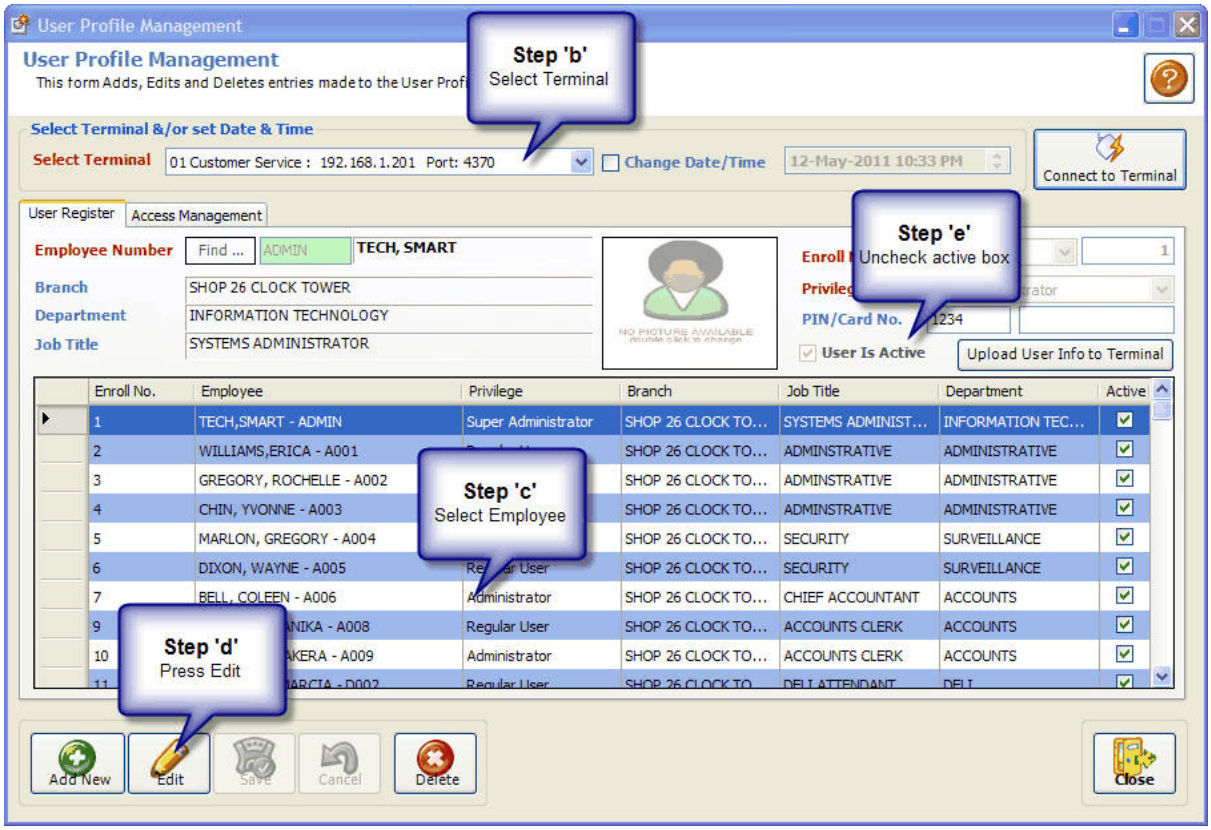
d. Select the Access Management tab and make a green tick to the left of the Time Clock(s) you wish to remove the employee from,

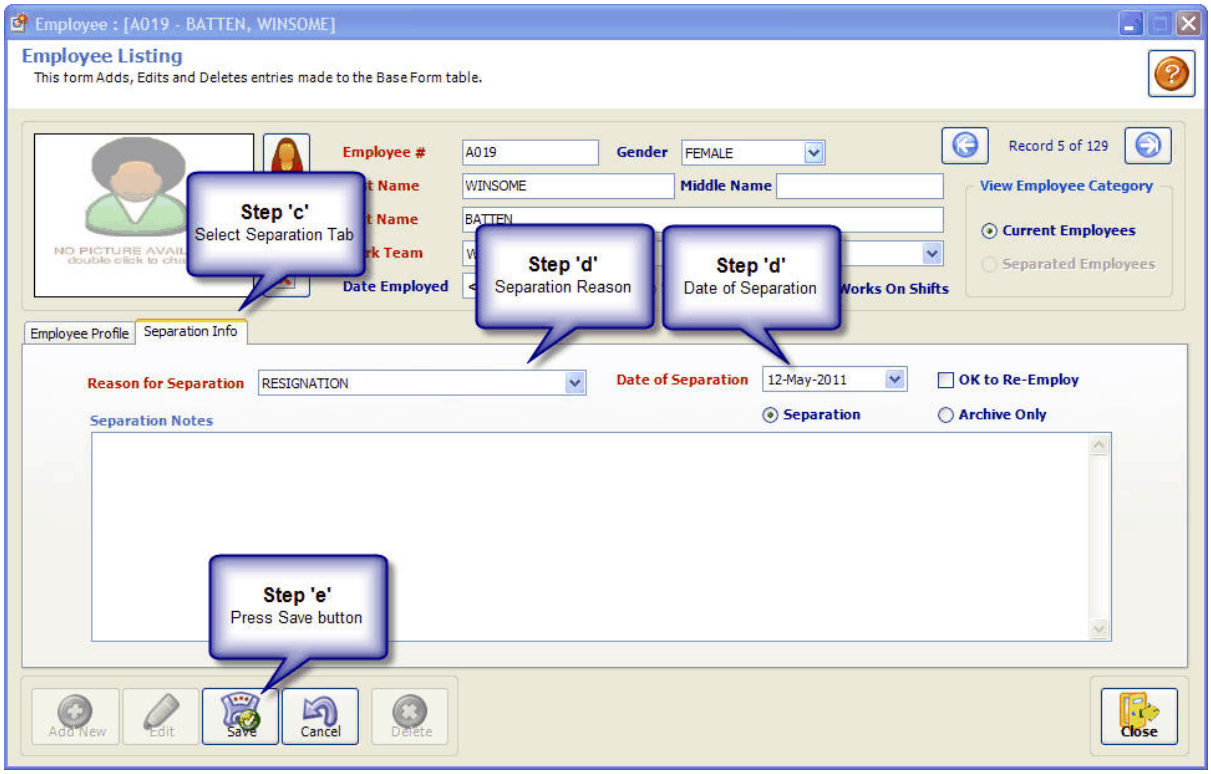
e. Press the Remove Template from Terminal(s) button.



2. Option 1: Making Employee Profiles Inactive
   a. On the Terminal Management menu, select Manage User Profiles
   b. From the list of Terminals, select the Time Clock the user is assigned to
   c. From the list of users in the employee list, highlight the name of the employee
   d. Select the Edit button, then uncheck the box that says User is Inactive
   e. Then press the save button.
3. Option 2: Deleting Employees from Time Clock
   a. Complete steps “a” through to “c” above.
   b. Select the Delete button and confirm the user should be deleted by selecting “yes” when the software ask if you are sure.



4. Separating/Arching Employees
   a. On the Tools & Options menu, go to Company Setup and select Employee Listing
   b. On the Toolbar, select the Browse button to search for the Employee
   c. Select the Separation Info tab and press the Edit button
   d. Select the Reason for Separation and Date of Separation. Otherwise, you may select the Archive Only option.
   e. Press the Save button to complete the separation.



2.11 Tutorial: Updating Employees & Fingerprints

To learn how to enroll employee fingerprints CLICK HERE!

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2.12 Tutorial: Using the Meal Management Module

The meal management module has two working scenarios. These are:

1. OPEN CANTEEN SYSTEM
2. MEAL BENEFIT ALLOWANCE SYSTEM

To learn how to setup any one of the scenarios above, CLICK HERE!

USING THE MEAL MANAGEMENT MODULE

After the meal management module is configured, there are certain working functions that assists users to carry out their daily tasks. These include:

OPEN CANTEEN SYSTEM

Users of the open canteen system will primarily use these functions:

1. Update Employee Meal Allowance (assign allowance to employees)
2. Meal Register Console (cash register for canteen cashier)
3. Meal Scan Override (log scan times in case of hardware failure)
4. Reports (meal value reports for payment and analysis)
   a. Employee Meal Tally Summary
   b. Employee Meal Tally Detail
   c. Team Meal Tally Summary

MEAL BENEFIT ALLOWANCE SYSTEM

Users of the allowance benefit system will primarily use these functions:

1. Meal Scan Override (log scan times in case of hardware failure)
2. Meal Register Log (mark employees as served)
3. Approve Staff Meals (approve overtime for teams)
4. Log Other Meals (log visitor and other non system meals)
5. Reports (meal tally reports for payment and analysis)

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a. Allowance Update History
b. Allowance Update History Detail
c. Employee Allowance Balance
d. Employee Account History
e. Meal Cash Balance Total by Date
f. Meal Charge Total by Date
g. Meal Purchase Analysis by Value
h. Meal Purchase Analysis by Quantity

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3 Application Main Modules

The SMART ScheduleMaster application comes in four versions which has several modules.

VERSION LIST

1. Express : Basic time management and tracking functions
2. Standard : Basic time tracking with leave management embedded and where employee's times are managed centrally by a department such as payroll.
3. Corporate : This includes time tracking with leave management embedded but allows for decentralized management where supervisors and managers can edit their teams timesheets
4. Enterprise + : The Enterprise module has all the features of the Corporate but includes Reason Management and Auditing features.

MAIN MODULES

- Absent Management Module
- Auditing Module
- Employee Module
- Meal Management Module
- Payroll Integration Module
- Reason Management Module
- Shift & Scheduling Module
- Time Management Module

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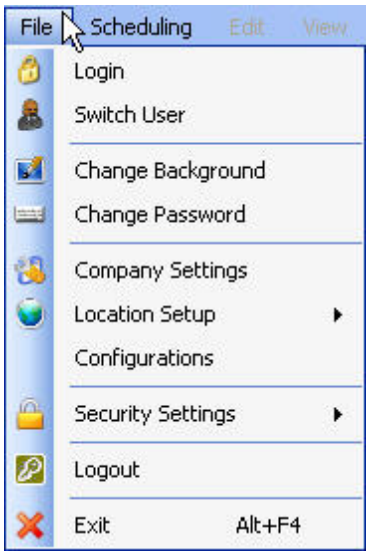
4 Application Menus & Functions

Once logged in your SMART Schedule Master Pro home screen will display.

4.1 File Menu



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This menu allows you to manage the basic access to SMARTSchedule Master. You will be able to use initial setup functions such as:

Login/Logout

Switch User

Change background

Change Password

Company Setup

Location Setup

Configurations

Security Settings

Exit

4.1.1 Login

Logging into the the Schedule Master Pro is simple and easy. There are only two methods of user authentication; supplying a username and password or supplying a scan of your fingure print (Specialize device may be required for biometric authentications).

Username & Password

Once the application is ready to accept your credentials a dialog box like one displayed below in figure 1. will appear on your computer screen.

Figure 1.

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First, select you r company from the drop down menu that's provided. Then, supply your username and password and hit the login button. Once you have been authenticated the "Login dialog" will close and the application will be ready to use.

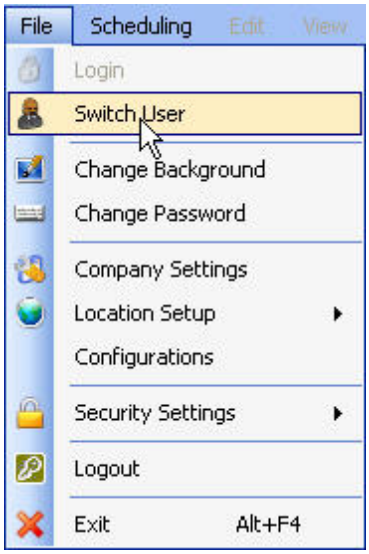
Biometric Access

Related Topics

Logout
Change Password
Switch User
Exit

4.1.2 Switch User

You can switch between users easily by selecting the "Switch User" option from the drop down "File" menu option.



The "Login" dialog box will appear and you will then need to follow the Login instructions to be successfully switch as the new user.

Figure 2.

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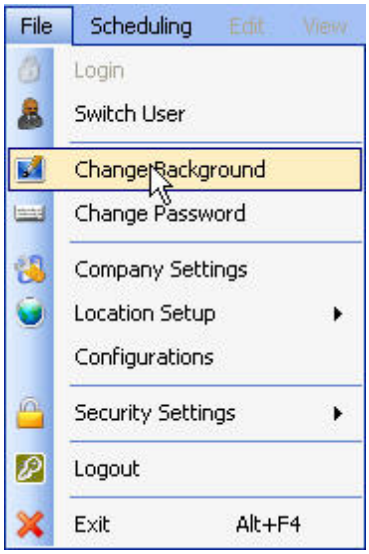
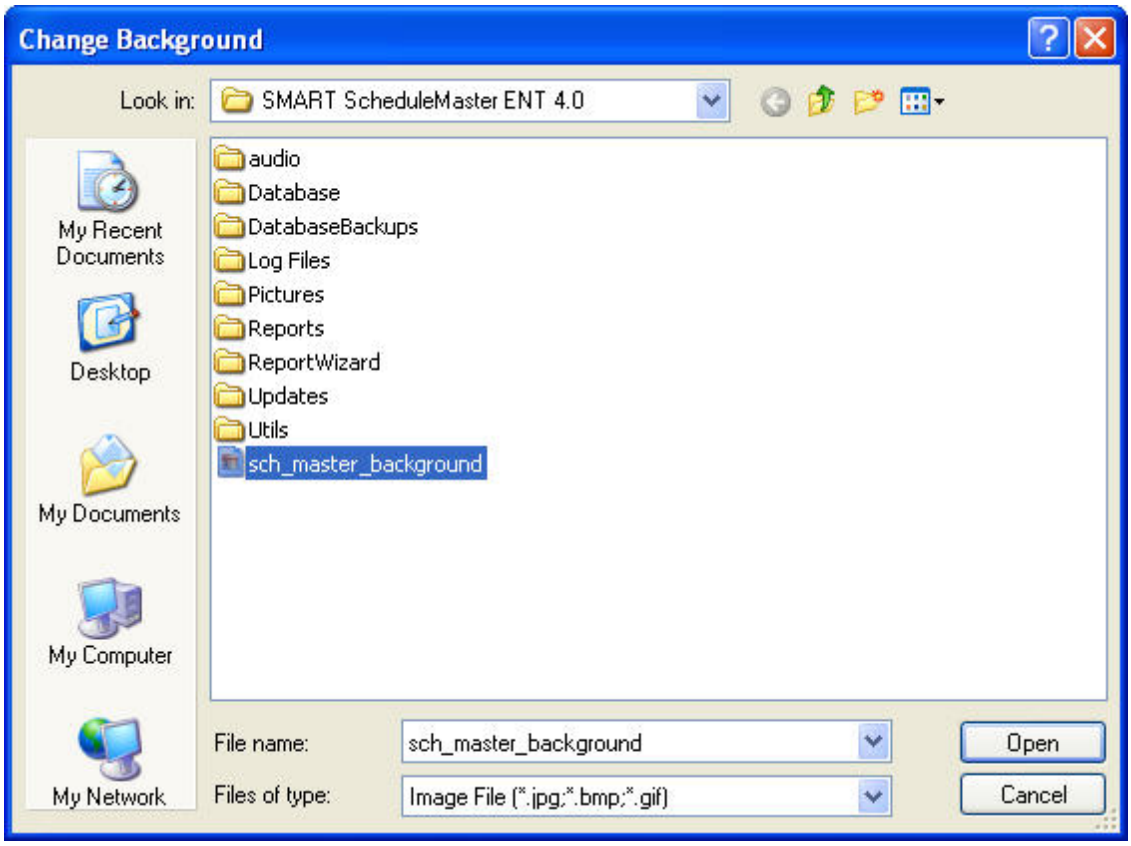
4.1.3 Change Background

Changing the background of the application's user area is done by selecting the "Change Background" option from "File" menu option drop down.



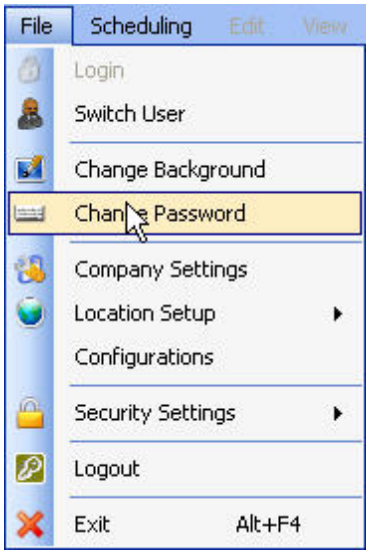
A Change Background dialog window will appear. Navigate and select the image that you want to use and click "Open".



Note: The recommended image size is 1300 pixels wide x 850 pixels high.

4.1.4 Change Password

Go to the change password option located under the File Menu.



1. To change your password first select your company from the dropdown menu, if it is not already selected. Your username should also already be displayed in the Username field, if not enter it.

2. Enter your current password in the box labeled "Old Password".

3. Type your new password and then **tab** to the next field and confirm your new password by retyping it. Then click the button on the dialog window labeled "Change".

4.1.5 Company Settings

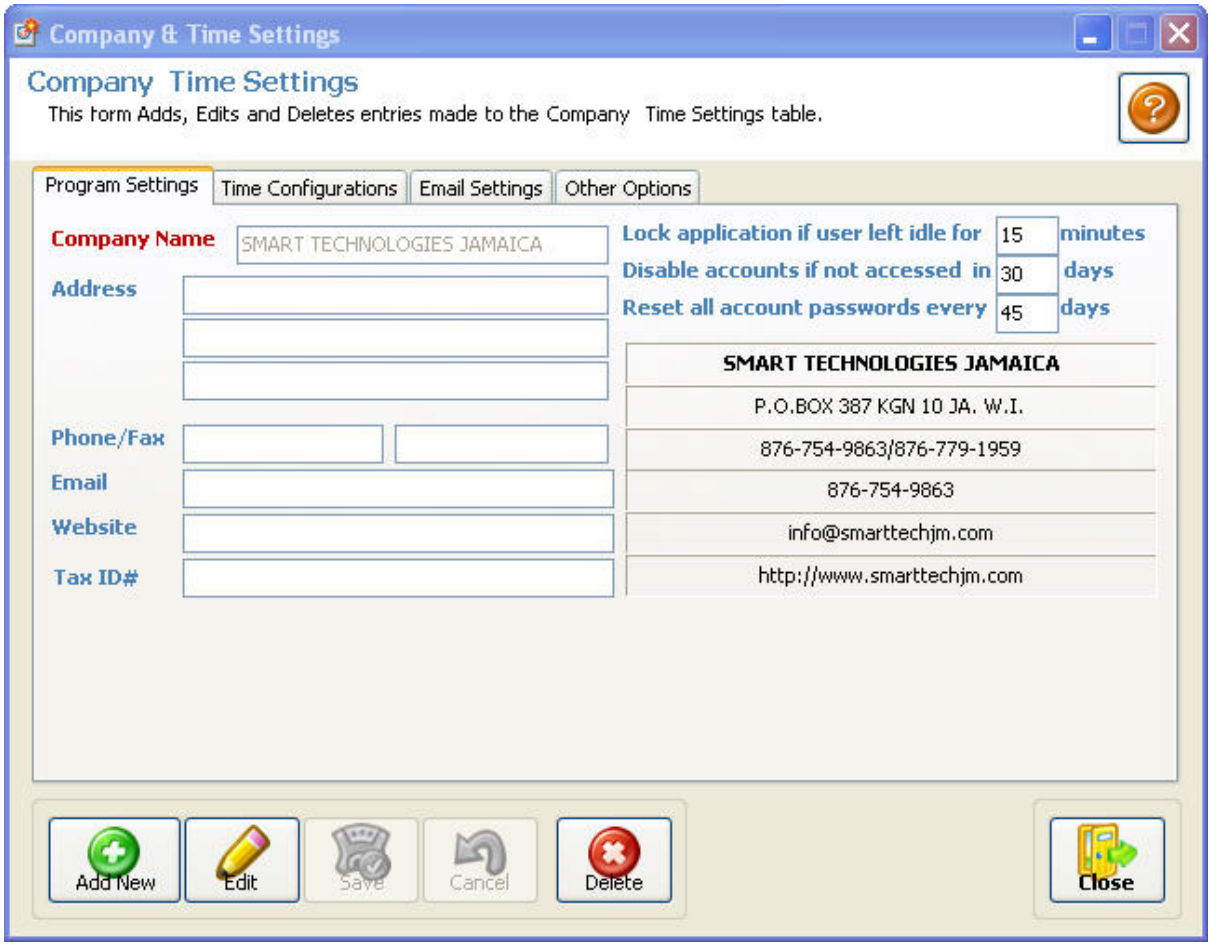
The company and time setting Is broken up into four categories:

1. Program Settings

2. Time Configuration
3. Email Settings
4. Other Options

Program Settings

The program settings consist of eleven fields allowing the setting or updating of the company's address, phone /fax lines, email address information and website url, Tax ID, application's lock if idle threshold, automatic account disable settings and the password renewal interval. Though displayed you cannot update the Company's Name in the application for this window.



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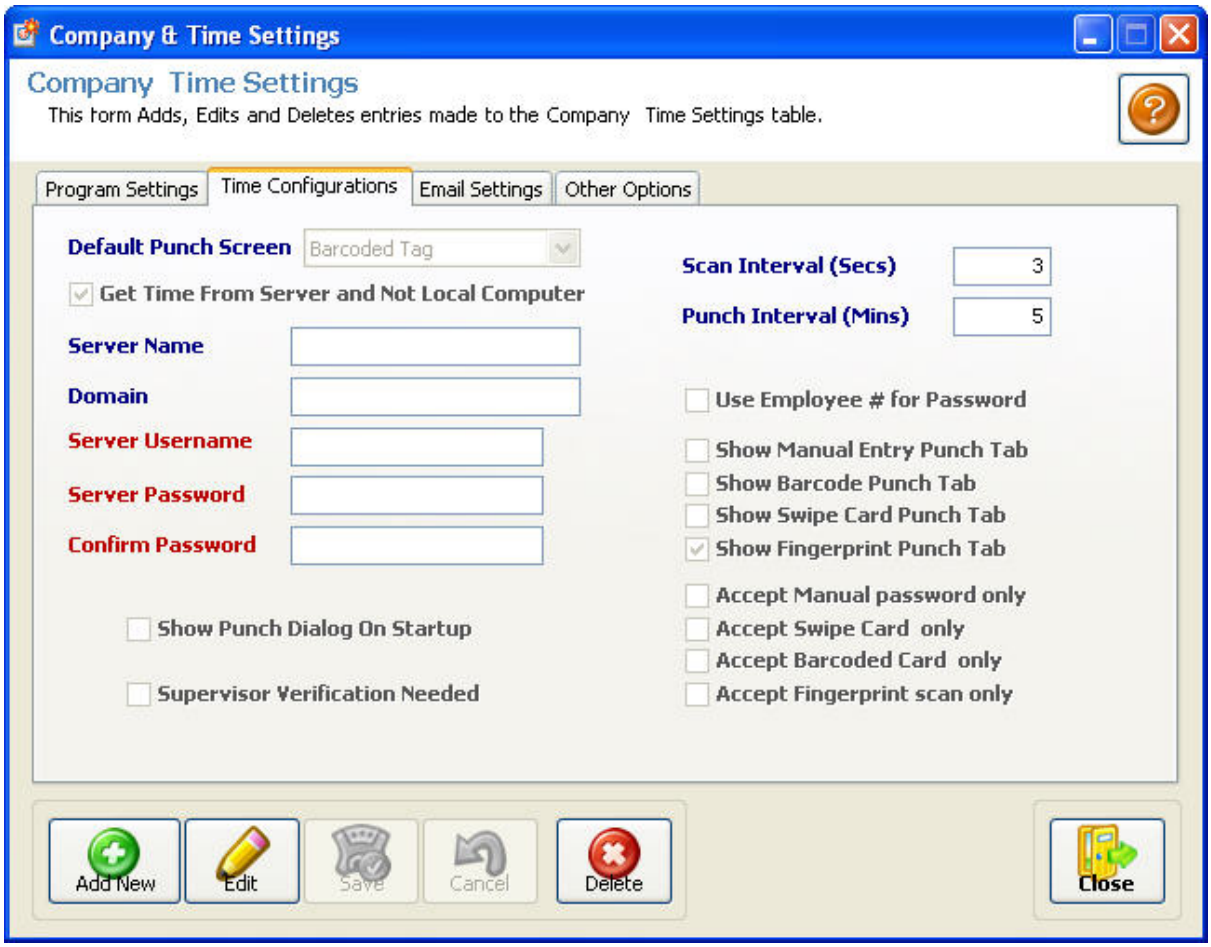
The Time Configuration settings only apply to USB fingerprint scanners being used to clock in and out staff. When Time Clocks are mounted on walls, these settings have no effect on the overall system performance.



When employees clock in late, the system can send an automatic email to all employees who have an email on file and the notify feature is turned on. The main email sending account settings in configured on this screen.

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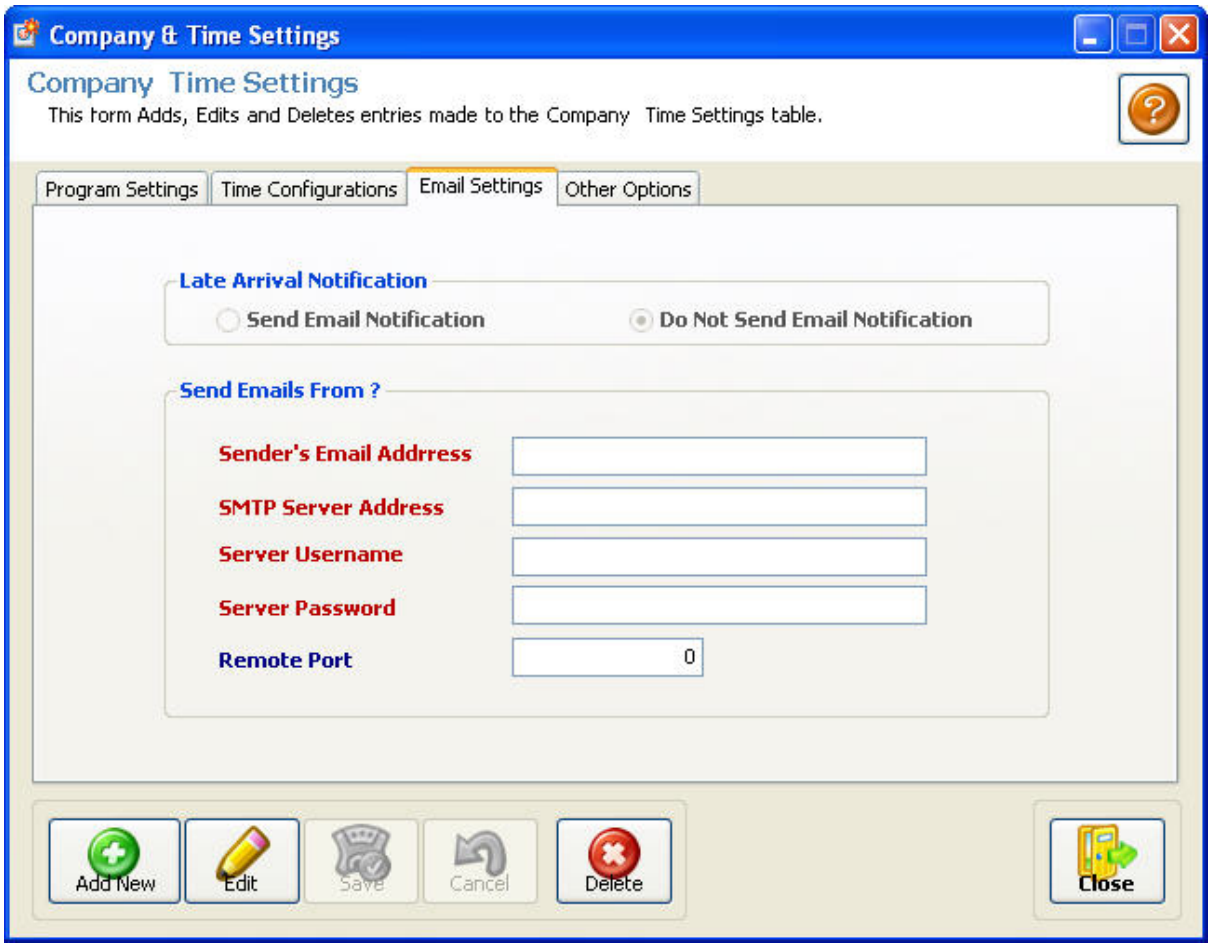

Other settings include:

- Log First In/Out
  - o The system will only log an employee's first in and last out times
- Print EOD TimeCard and Printer Name
  - o After the shift is complete, a mini printer will print the employee's timecard. This feature only works with USB Scanner and not mounted Time Clocks.
- System Default Filter Option
  - o For payroll management data screens such as Payments, Deductions, Time Override etc; the select filter option will appear as a default of all the screens.
- Auto Employee ID feature

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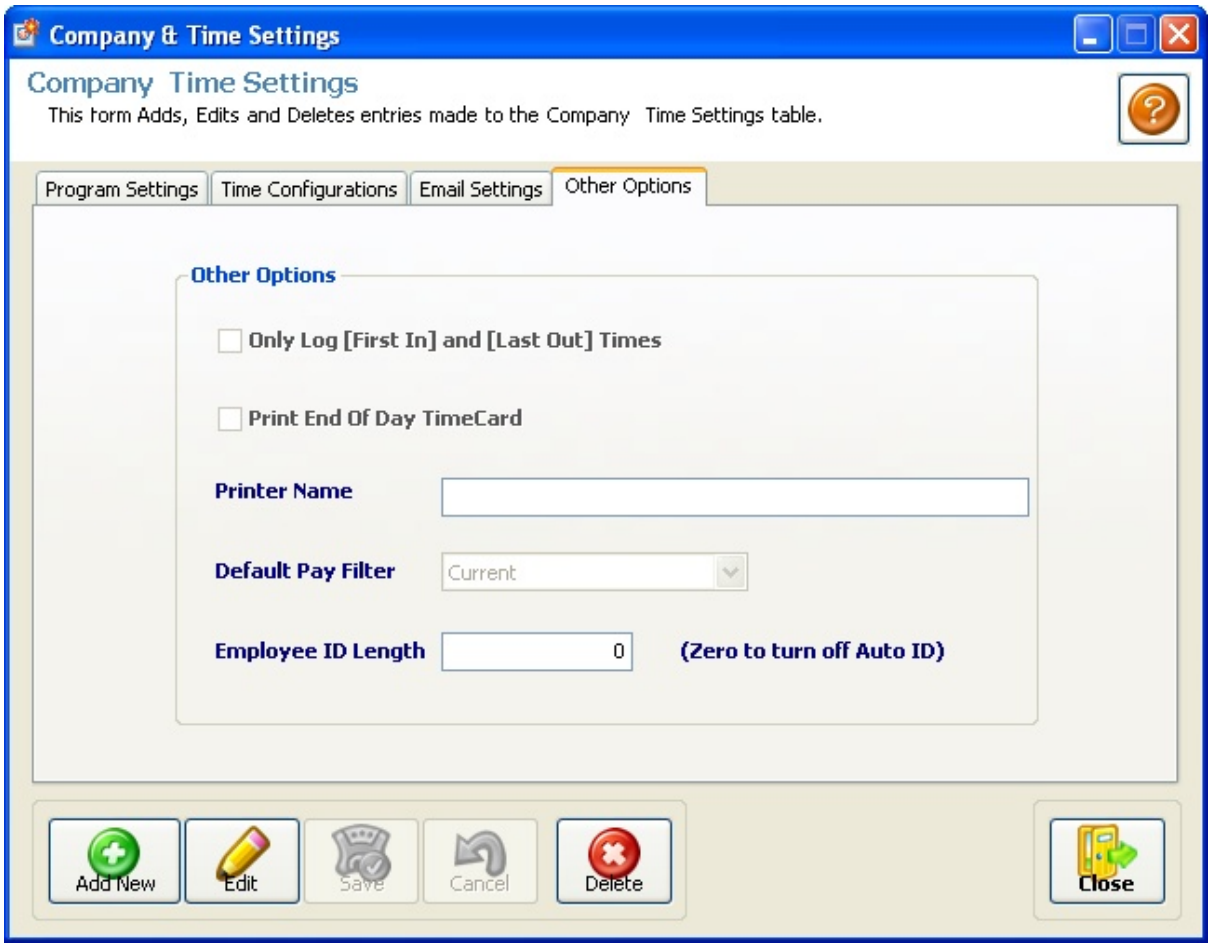
o When a length is specified and new employees are added, the system will give them an auto ID number. Eg. a length of three (3) will give an ID ending with three digits such as "003"



4.1.6 Location Setup

Location setup gives you the ability to define your business geological setup by using the following :

Branches

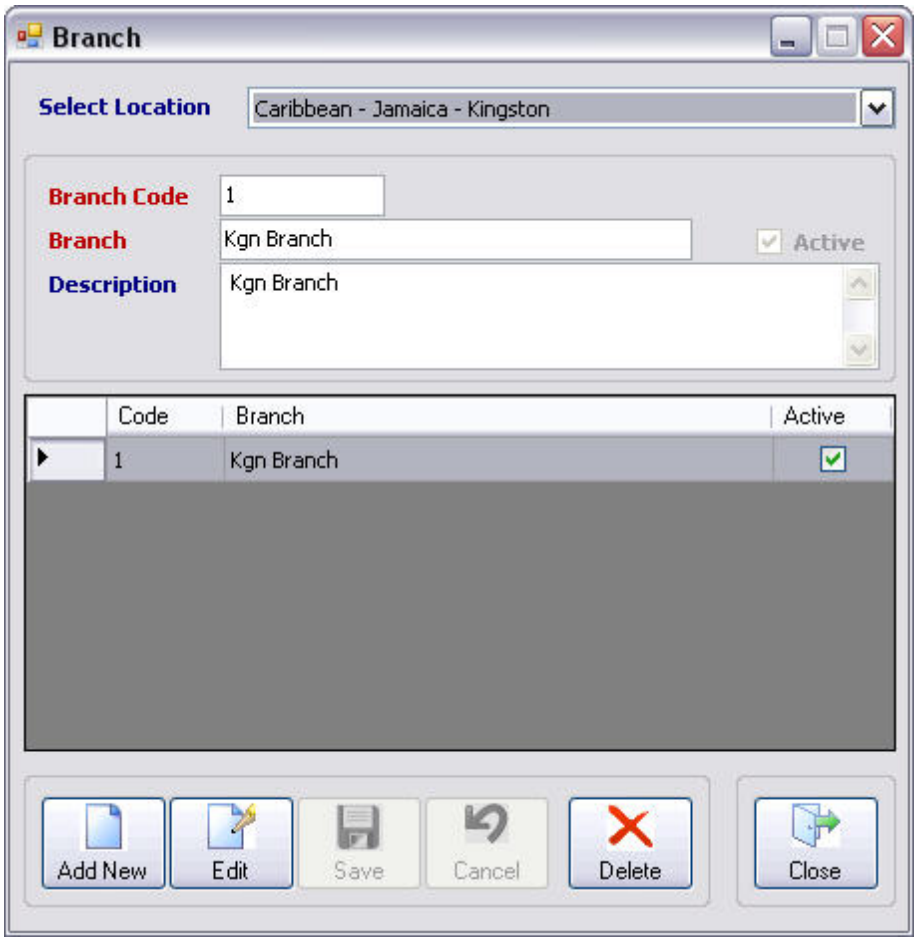
Regions

Countries

Locations

4.1.6.1 Branches

Branches define the physical location name of each branch with the company.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

N.B. At any stage in the process, once the "Cancel" button is enabled, you may left mouse click on that button to cancel the data entry process.

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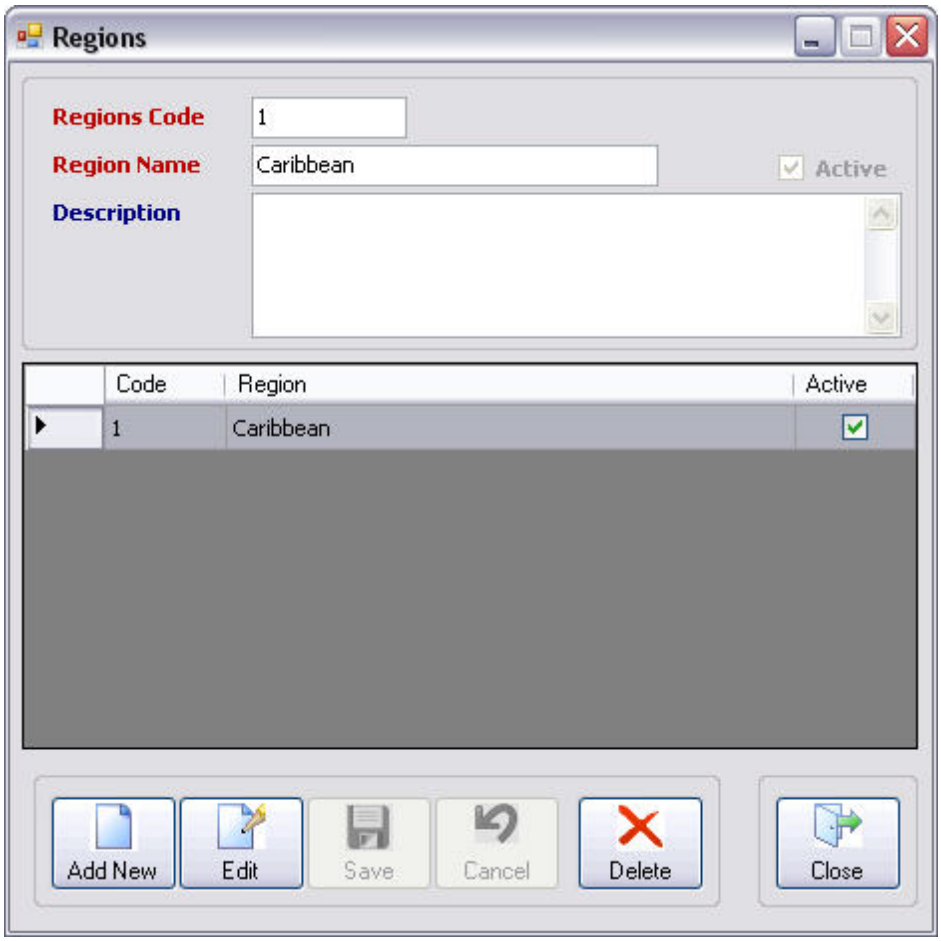
4.1.6.2 Regions

Regions define a wide geographical area such as Asia, North America or Caribbean.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

N.B. At any stage in the process, once the "Cancel" button is enabled, you may left mouse click on that button to cancel the data entry process.

4.1.6.3 Countries

Countries define each country within a region where subsidiaries and branches of the company are located.

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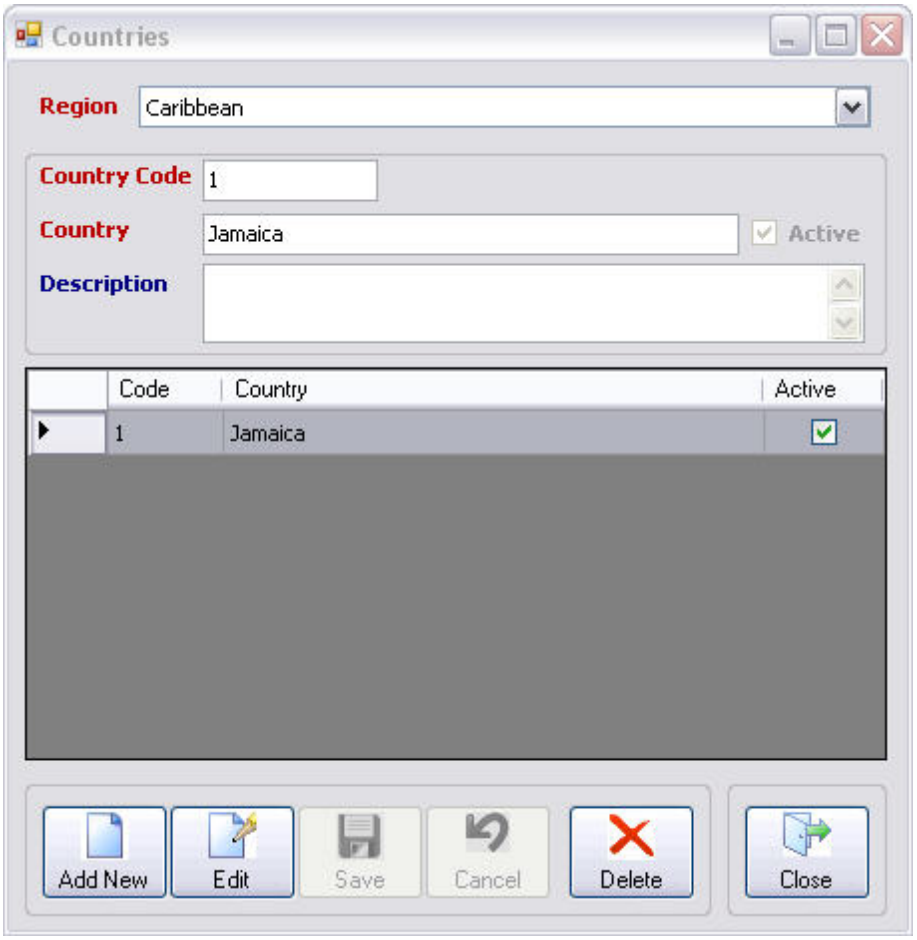

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

N.B. At any stage in the process, once the "Cancel" button is enabled, you may left mouse click on that button to cancel the data entry process.

4.1.6.4 Locations

Locations define a common geographical area within a country such as a city where the company branches are located.

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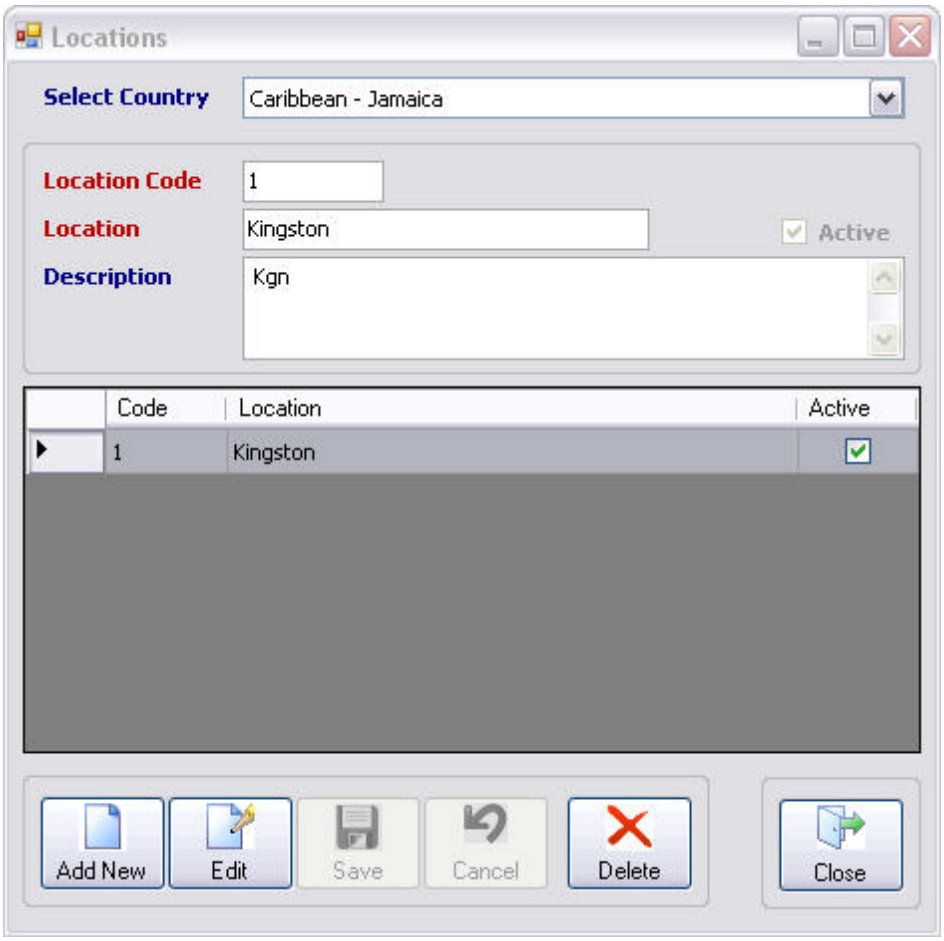

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

N.B. At any stage in the process, once the "Cancel" button is enabled, you may left mouse click on that button to cancel the data entry process.

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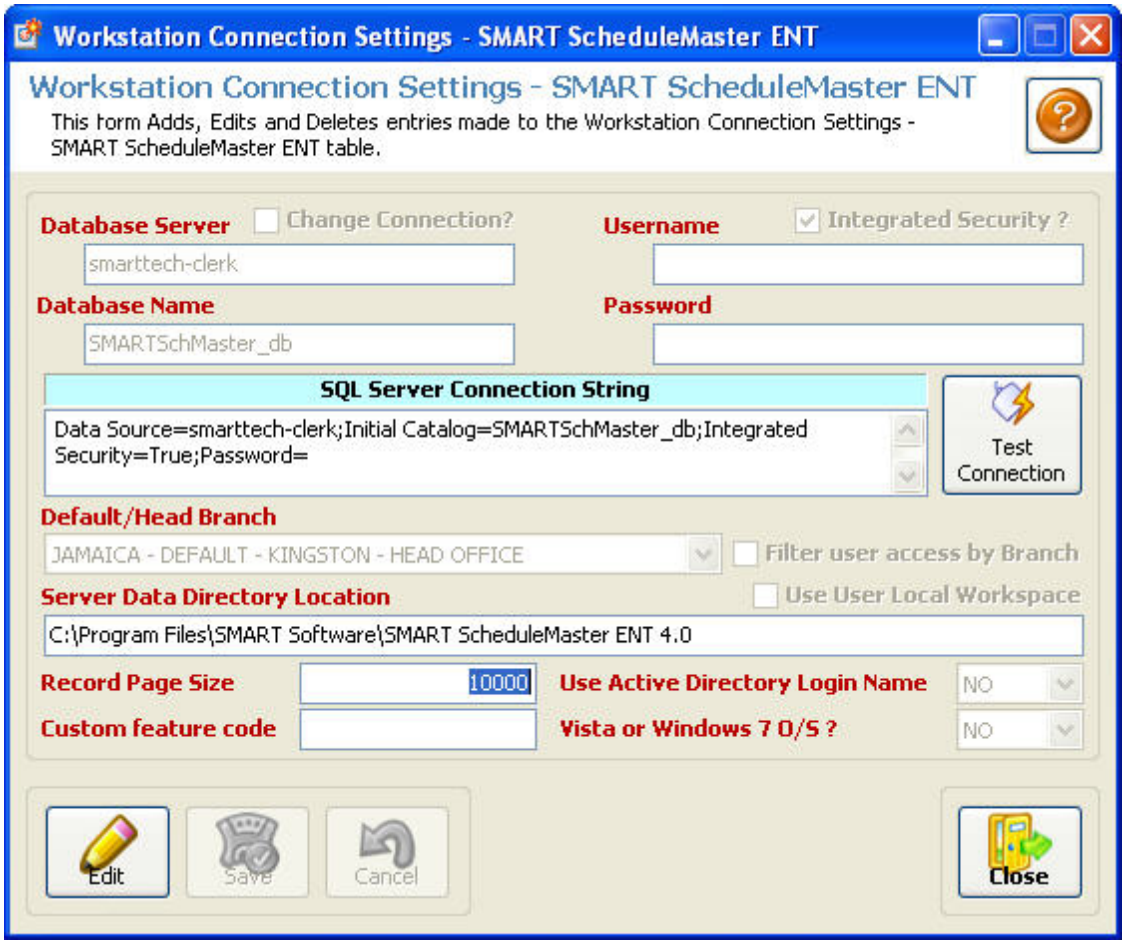
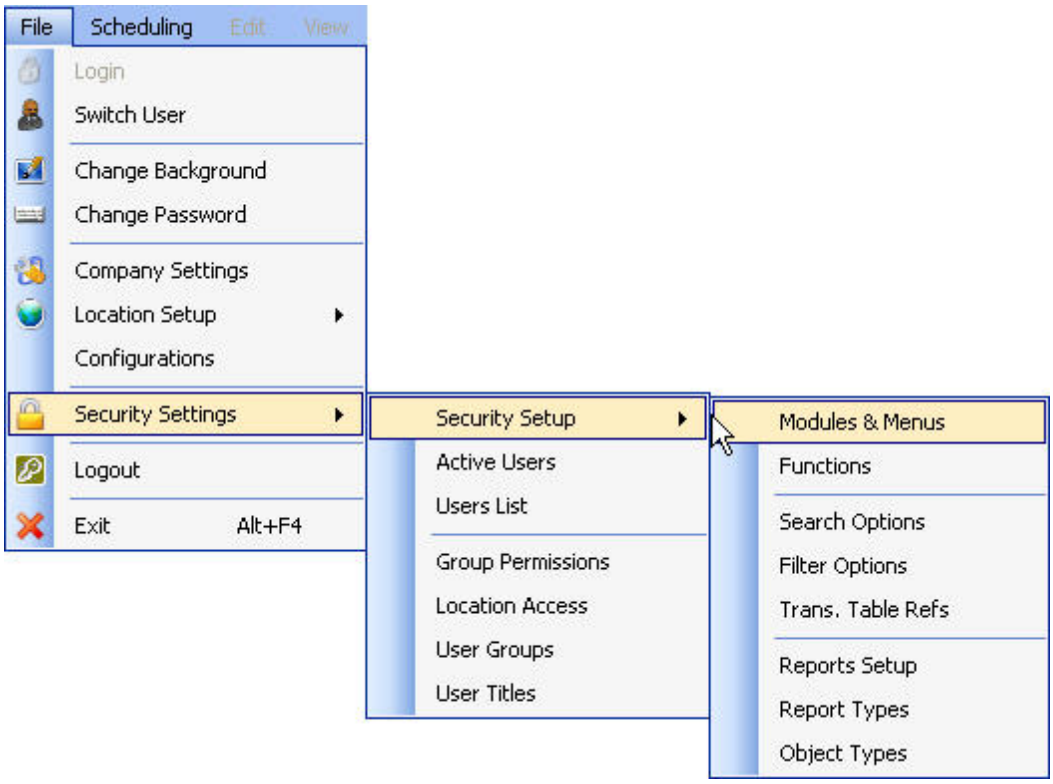
4.1.7 Configurations

Click here to see how to configure SMART ScheduleMaster software.



4.1.8 Security Settings

The Security Settings option (usually managed by the SMART Tech System Administrator) which allows for configuration of system security options.



4.1.8.1 Security Setup

Using this funcionality users will be able to access:

Modules & Menu

Functions

Search Options

Filter Options

Transaction Table Reference

Reports Setup

Reports Setup

Object Types

4.1.8.1.1 Modules & Menu

This screen is a system security option (usually managed by the SMART Tech System Administrator) which allows for configuration of a new or customized menu option so user access can be granted on the Group Permissions window.

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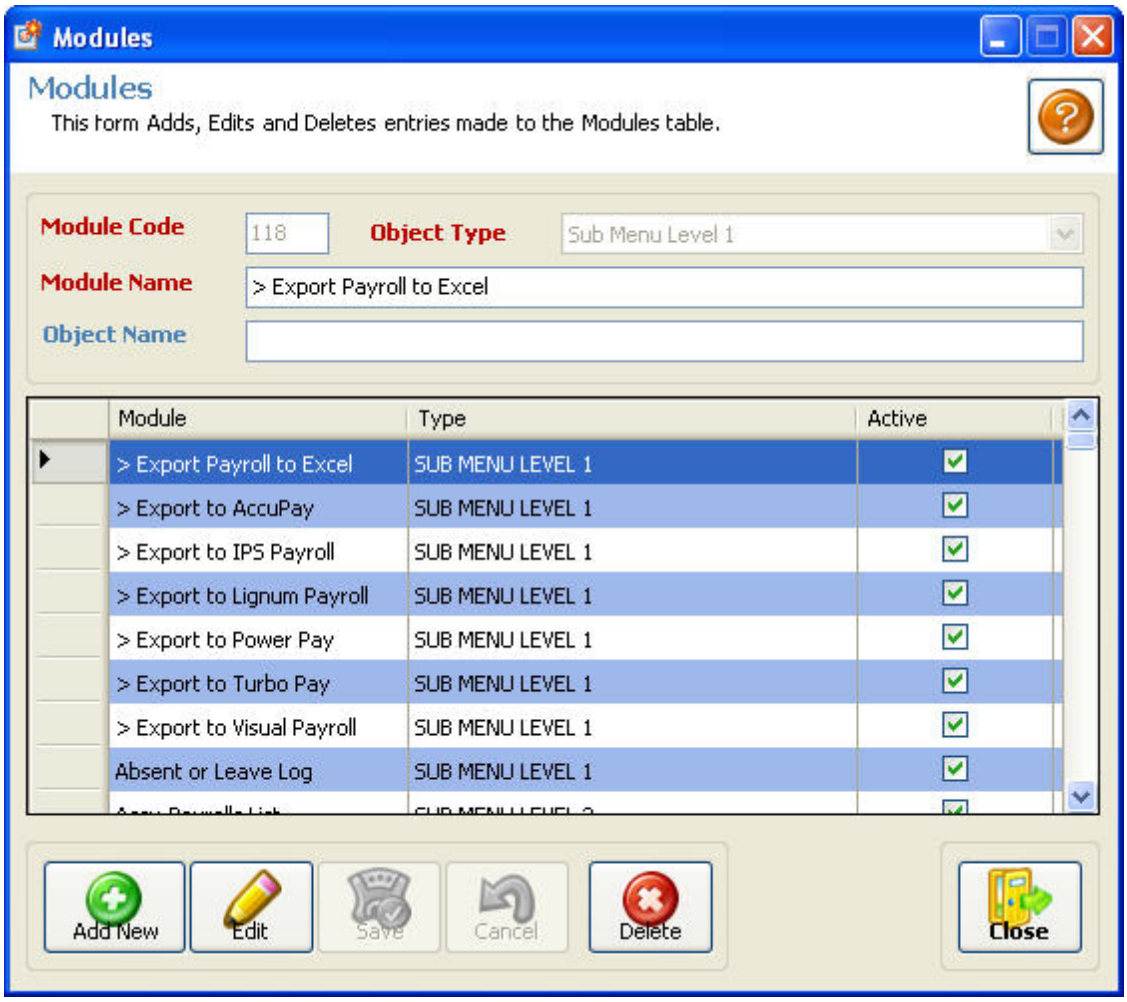

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.1.2 Functions

This screen is a system security option (usually managed by the SMART Tech System Administrator) which allows for configuration of a new or customized functions so user access can be granted on the Group Permissions window.

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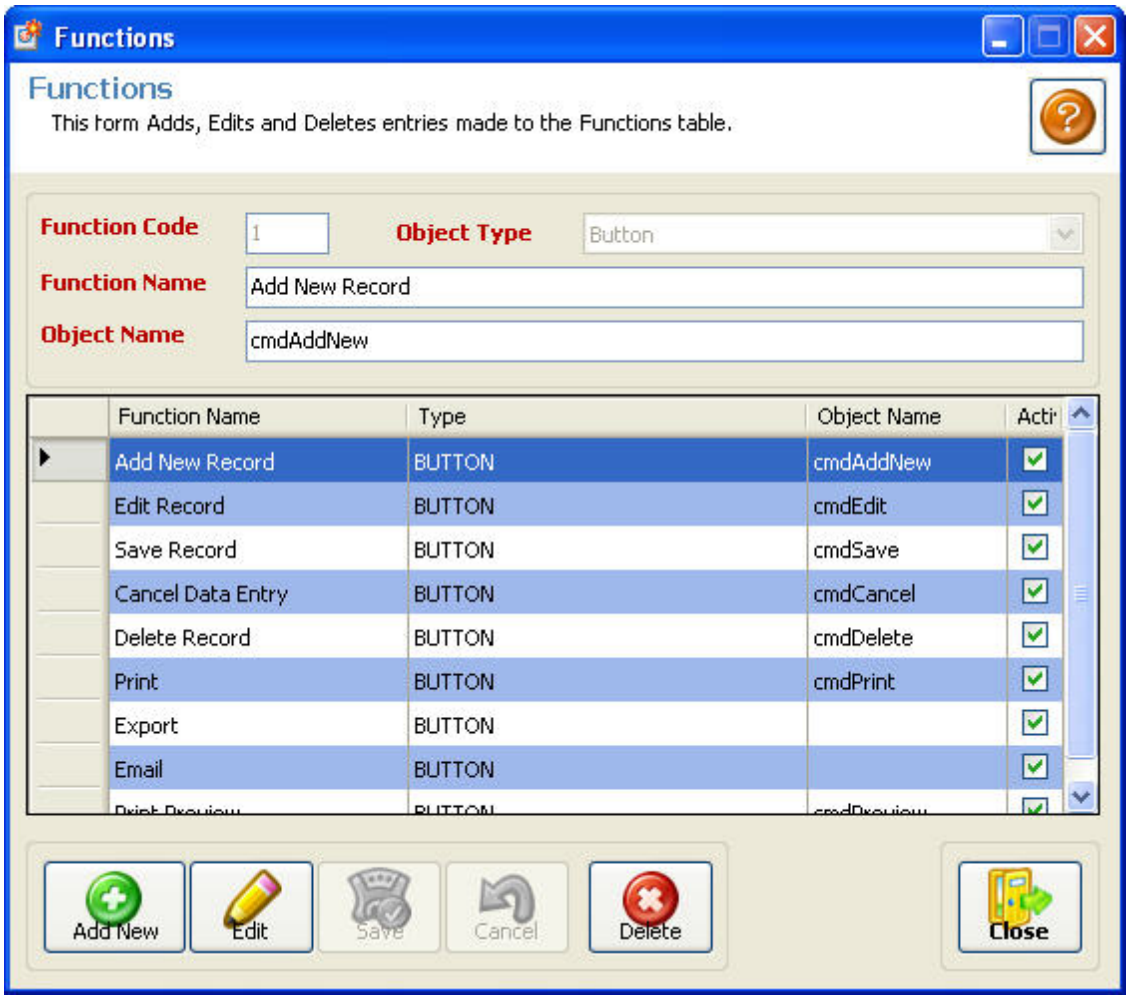

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.1.3 Search Options

This screen is a search option feature which allows for the Administrator to add search values to the Browse or Search features on data entry screens. This screen can be setup with the assistant SMART Tech System Administrator.

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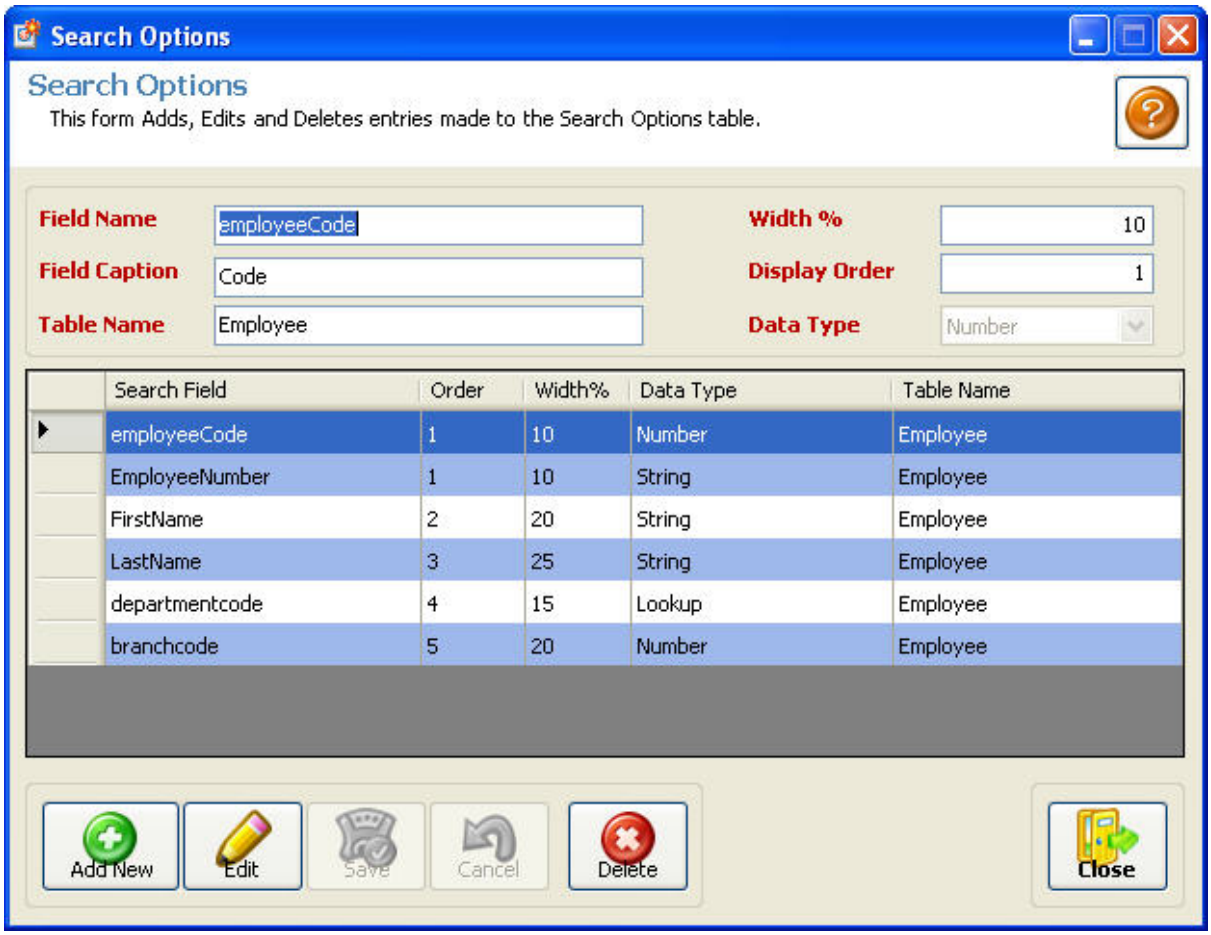

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.1.4 Filter Options

This screen is a filter option feature which allows for the Administrator to add more filter options on data entry screens. This screen can be setup with the assistant SMART Tech System Administrator.

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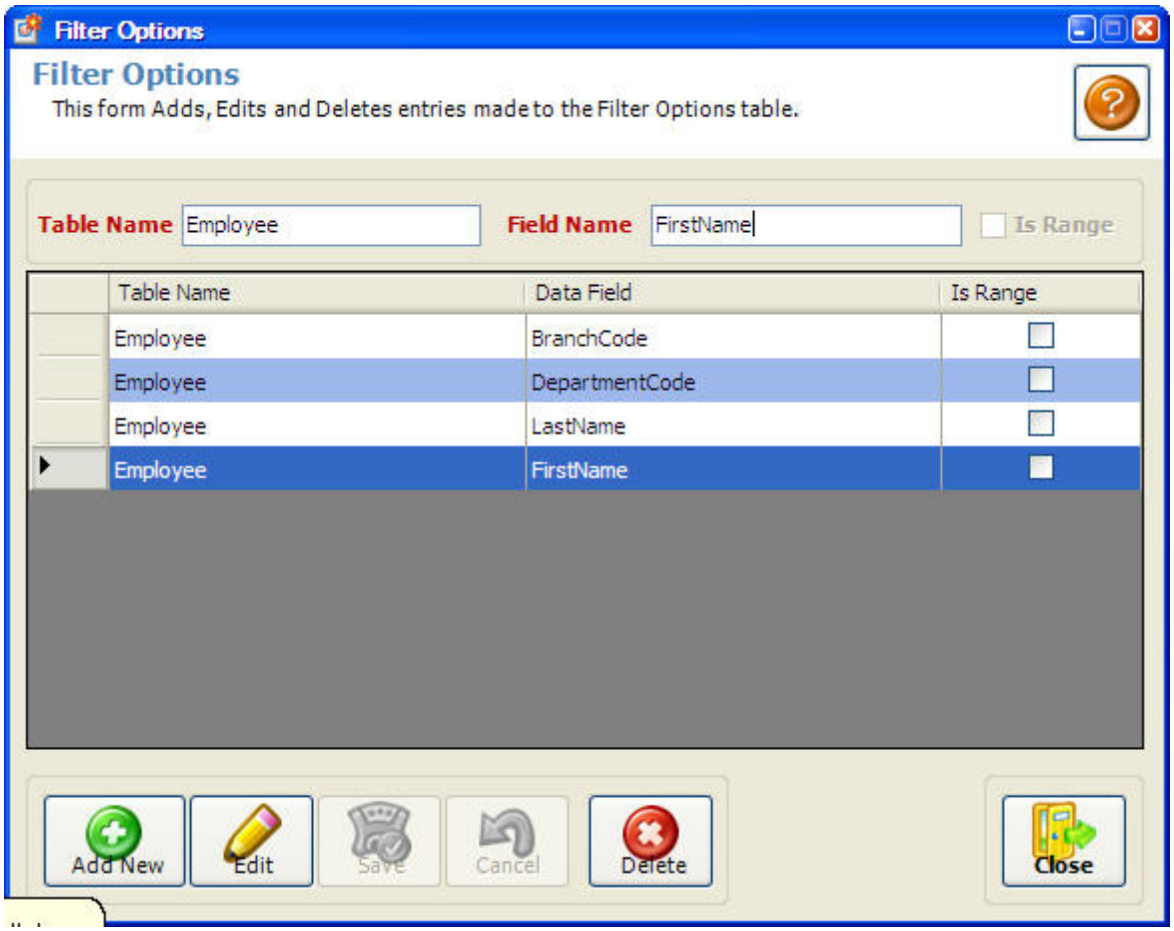

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.1.5 Transaction Table Reference

This screen is a system security option (usually managed by the SMART Tech System Administrator) which allows for configuration of delete restrictions on data entry screens. This restriction will prevent the deletion of a record that is being used to complete a related data profile.

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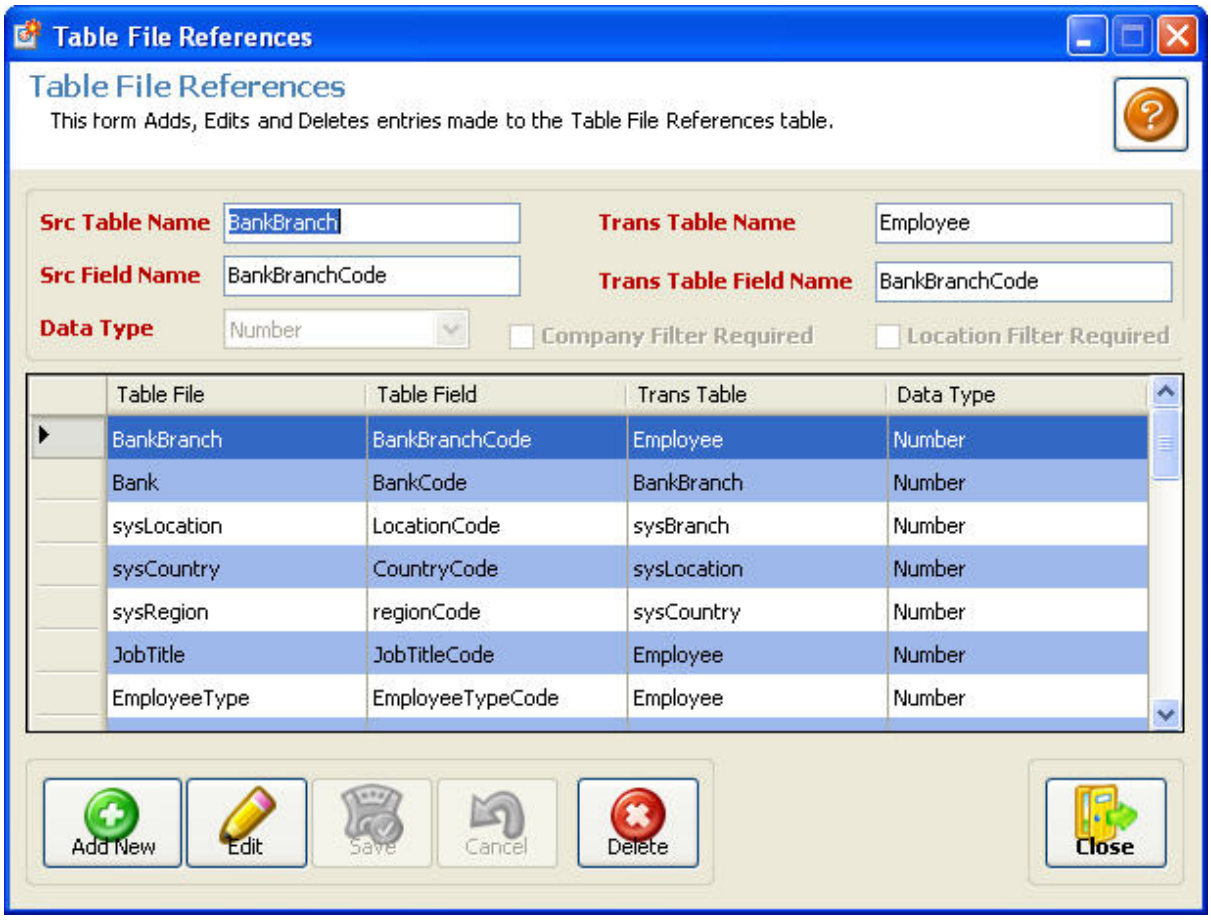

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.1.6 Reports Setup

This screen is a system security option (usually managed by the SMART Tech System Administrator) which allows for addition of new customized reports so user access can be granted on the Group Permissions window. Each new report file has to be copied to the server shared reports folder.

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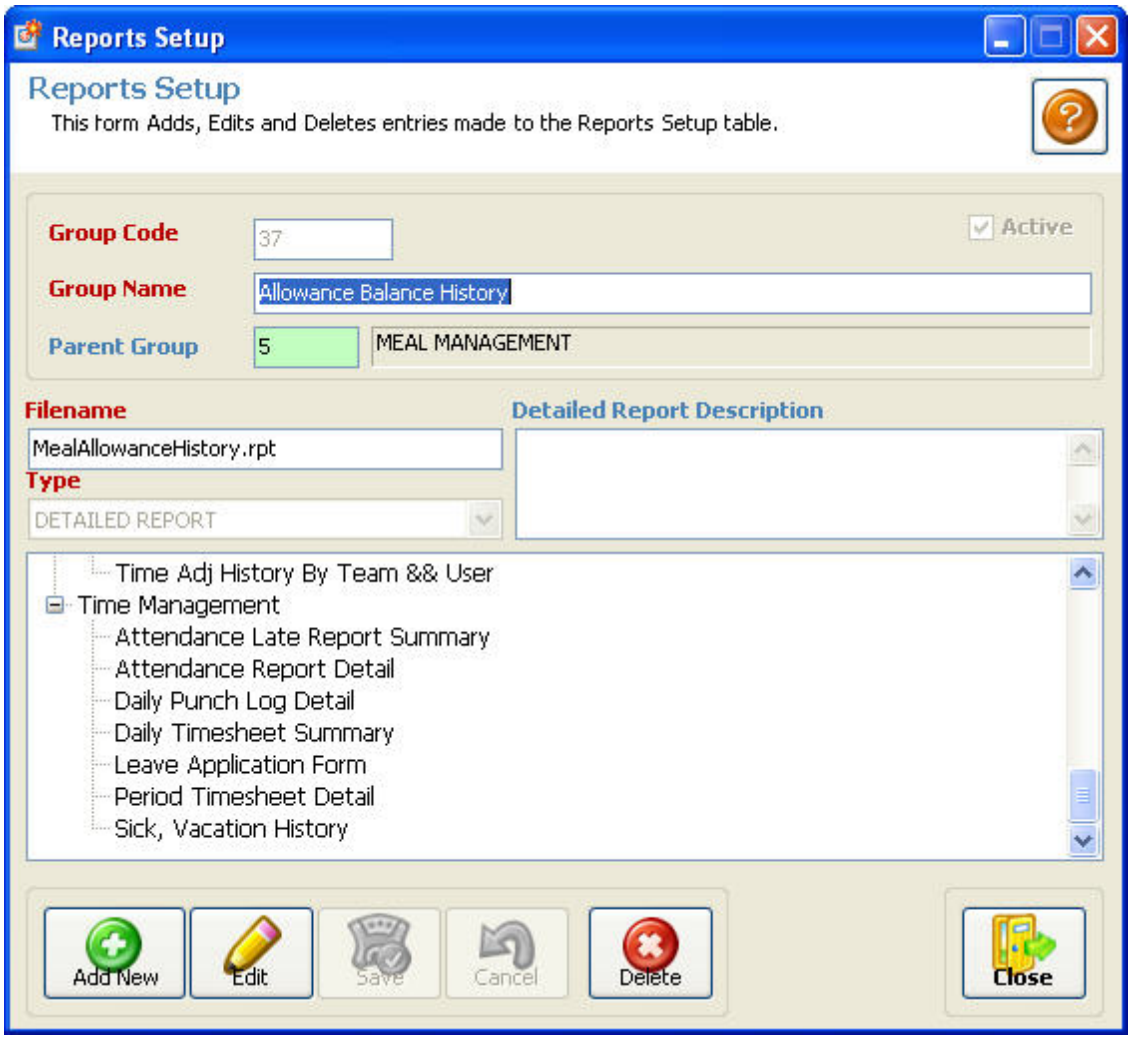
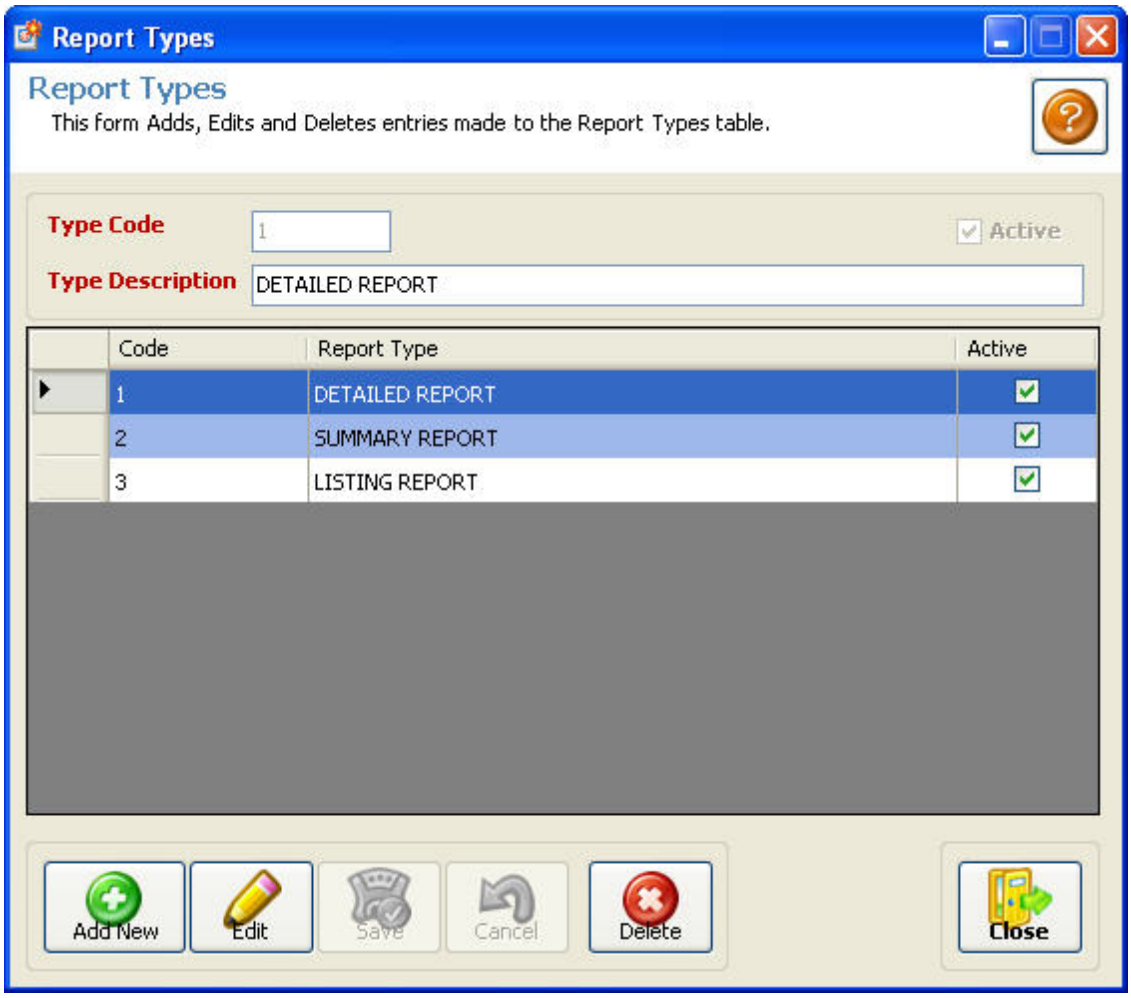


See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.1.7 Report Types

This screen is a system option (usually managed by the SMART Tech System Administrator) which allows for configuration of a new report type definitions to be used on the Reports Setup screen.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.1.8 Object Types

This screen is a system security option (usually managed by the SMART Tech System Administrator) which allows for configuration of Object Types to help further define system Modules so user access can be granted on the Group Permissions window.

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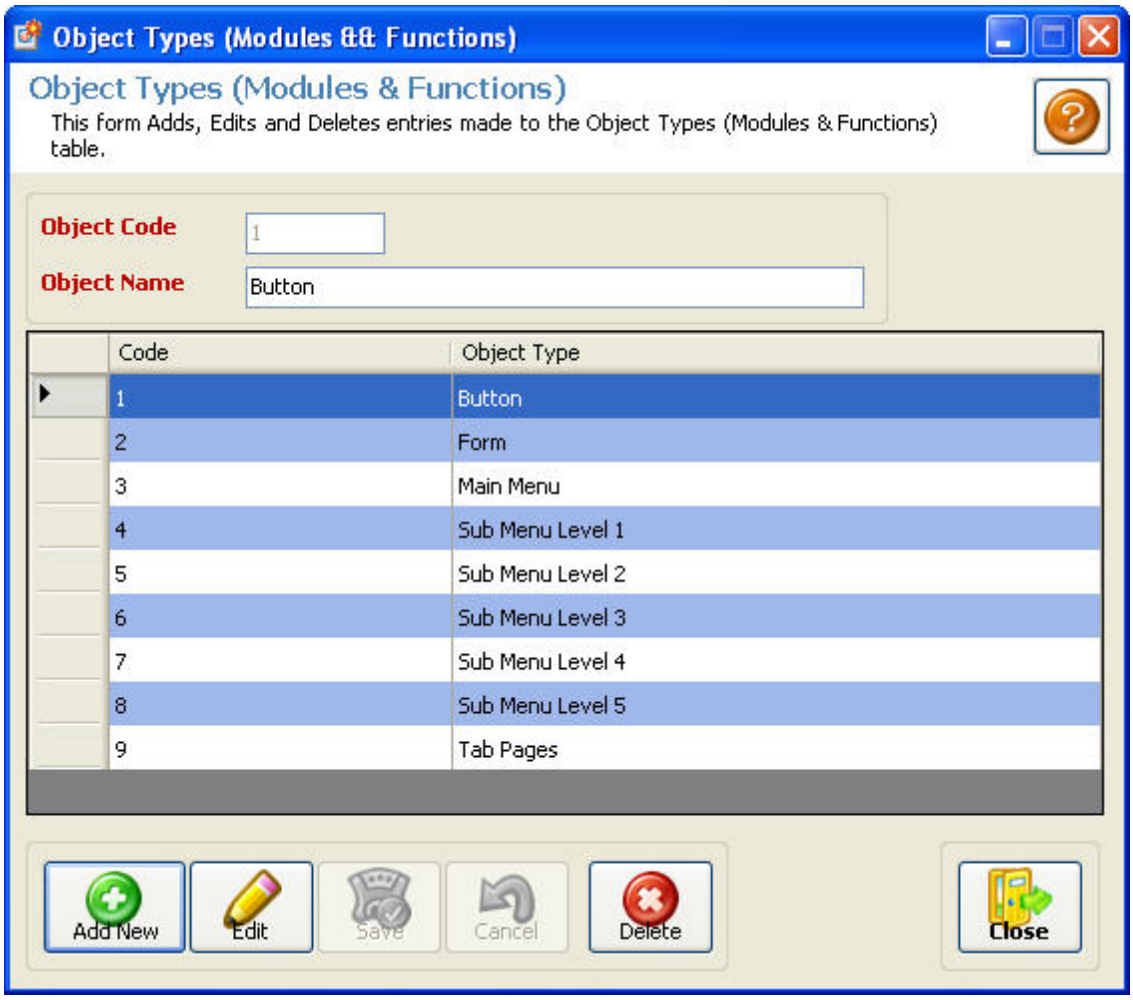
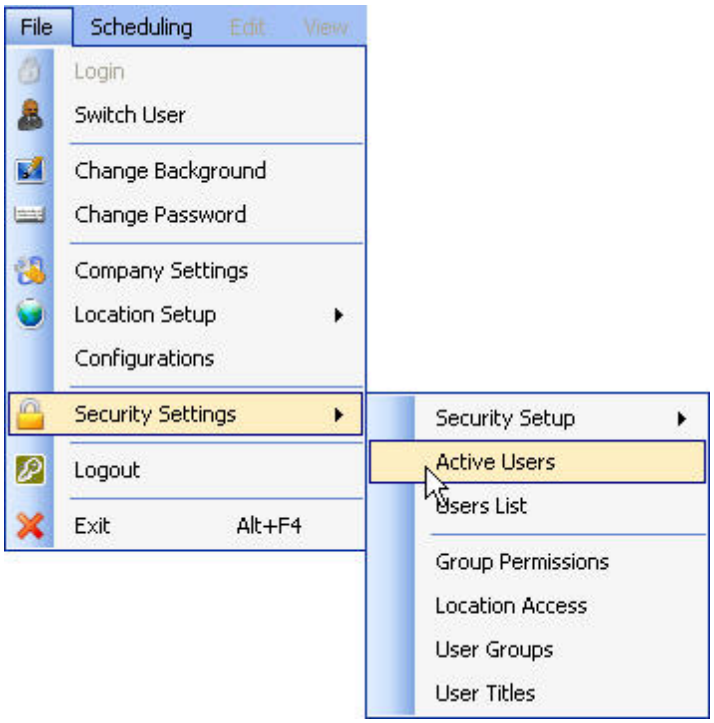


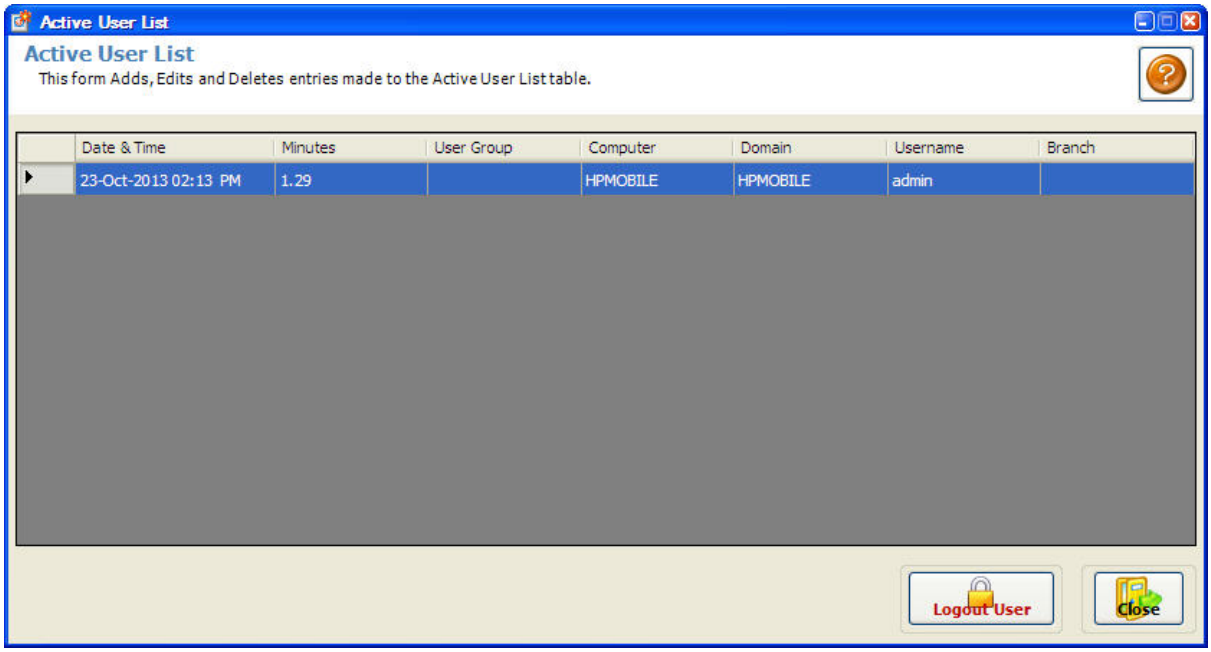
See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.1.8.2 Active Users

The active user menu option when selected will open the "Active User List" dialog window.

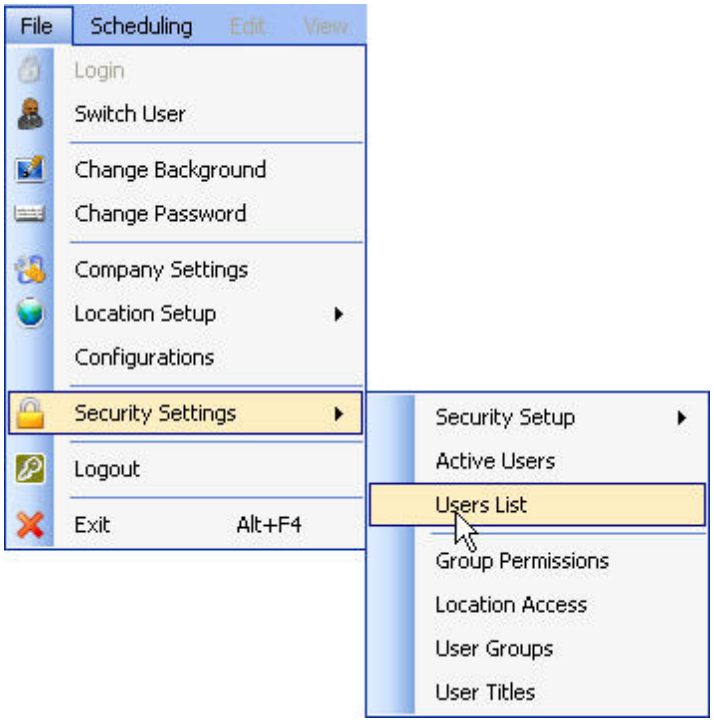


Here you will see a list of all the currently logged in users. If you are an administrator you will have the ability of forcefully logging out a user. To do this select the user in the user in the gridview. Once this is done, left mouse click the "Logout User" to forcefully log out the selected user.



4.1.8.3 Users List

The "User List" menu option when selected will open the "User List" dialog window.



Here you will see a list of all the users currently enrolled users in the system according to their roles and privileges define by their User Group.

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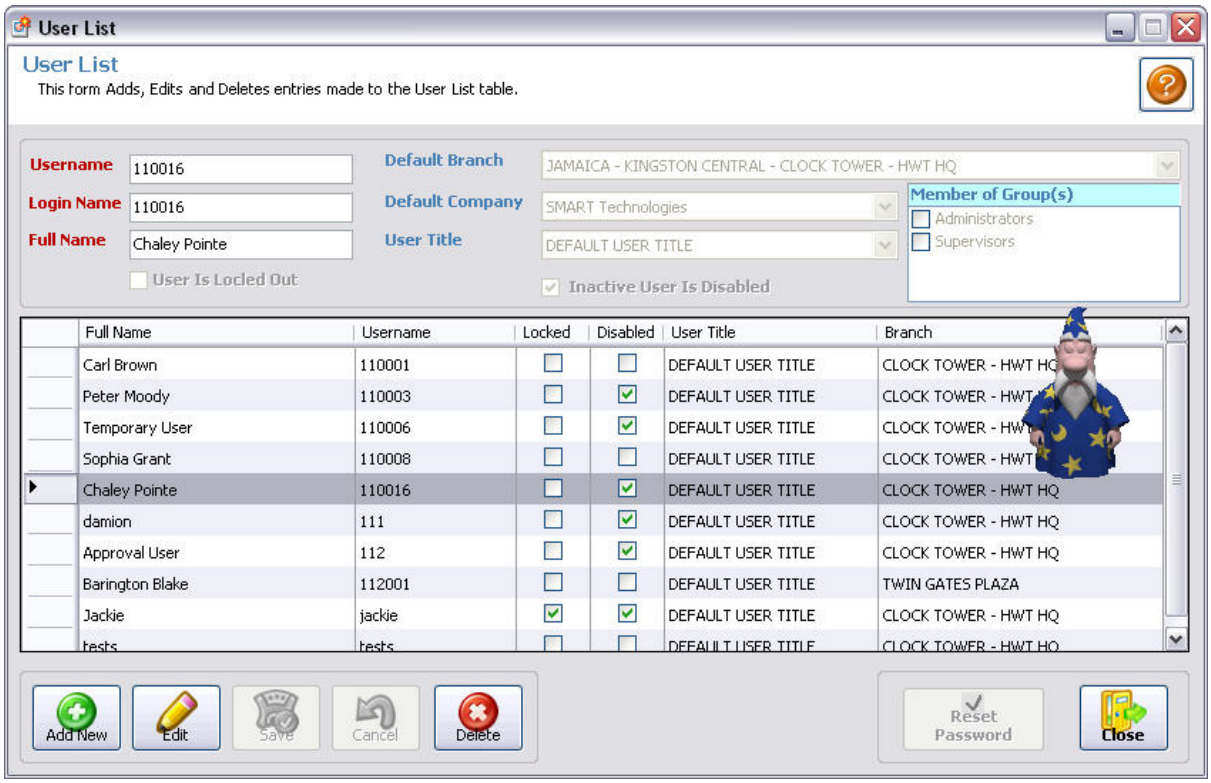

Add

To add a new user you first left mouse click the "Add New" button.

Once done, all data input field will become active on the form and the fields highlighted with bold, red labels are the required fields.

- Enter the User name, Login Name and Full Name for the new user.
- Select the corresponding Branch, Company and Title of the new user.
- Left mouse click either the "Save & New" button if you want to save and add another user, or "Save" button if you're only creating a single user.
- Left mouse click the "Close" button to exit the window.

Edit

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To edit an existing user, first select the specific user in the gridview of all users. Once you've selected the user, left mouse click on the "Edit" button.

Start editing the current values has you desire and hit the "Save" button when you're finish editing and you're done.

Delete

To delete an existing user, first select the specific user in the gridview of all users. Once the desired user is selected, left mouse click on the "Delete" button.

A confirmation window will appear, click "Yes" if you want to confirm deleting the user, and "No" if you no longer wish to do so.

Reset Password

To reset a User password, first select the specific user in the gridview of all users. Once the desired user is selected press the Edit button then left mouse click on the "Reset Password" button.

A confirmation window will appear, telling you that the user password as been reset to to a default password of [password]; click "OK" then Save.

4.1.8.4 Group Permissions

The "Group Permissions" menu option when selected will open the "Group Permissions" dialog window.

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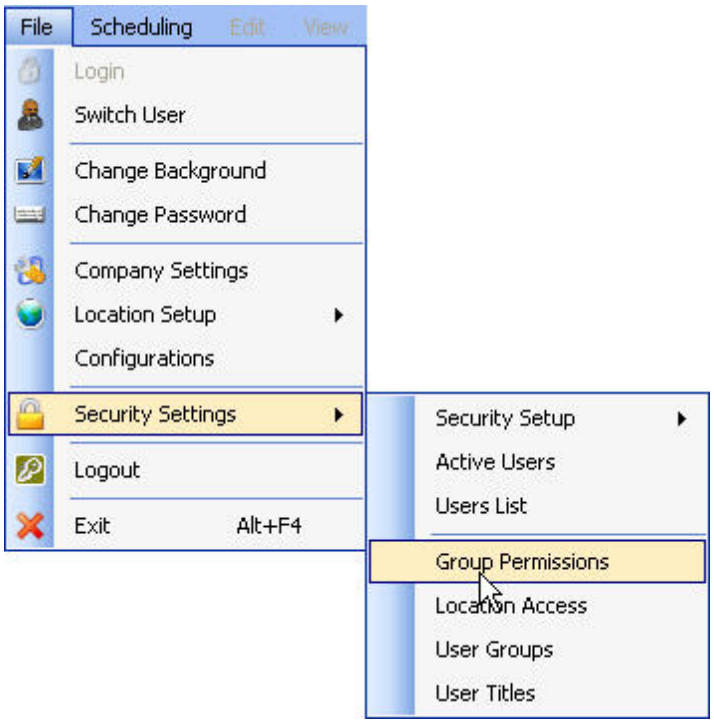
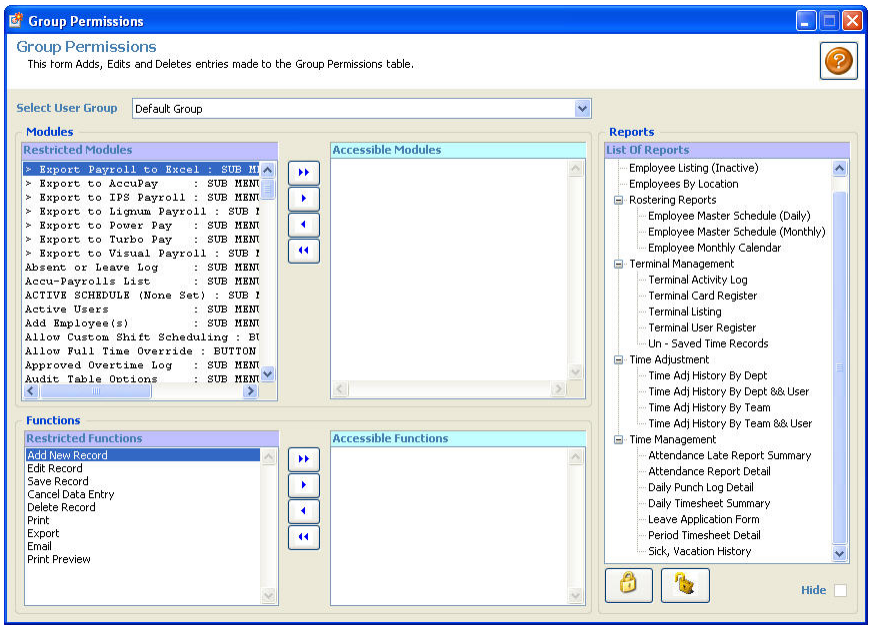


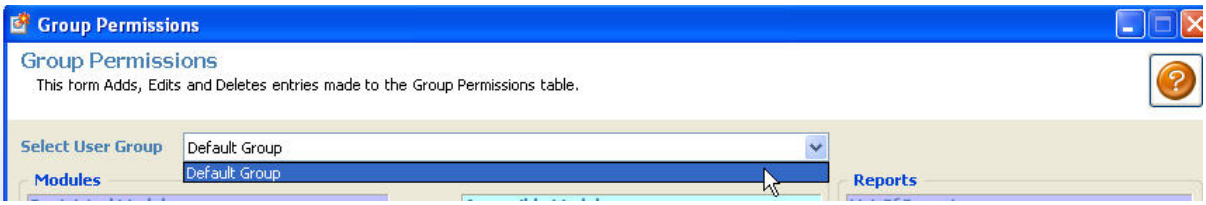
The "Group Permission" dialog window allows you to set and remove restrictions on various module, functions and reports for the different user groups defined with in the system.



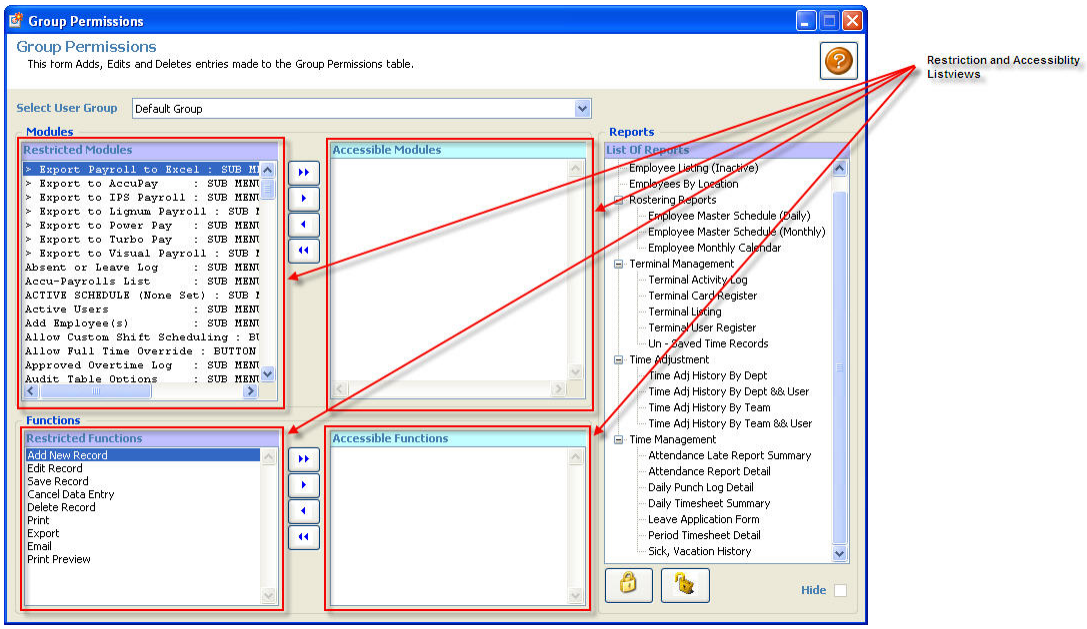
Modules & Functions

To modify restrictions on modules or function to a group, first select a user group from

the "Select User Group" list.



The "Restricted" and "Accessible" modules and functions lists will display the current restrictions and accessibility for the selected user group.



You are able to able to toggle modules between restricted and accessible by using the available arrow keys.

The single right pointing arrow key ; will move one the selected modules or functions from "Restricted" to "Accessible". The single left pointing arrow key will

do the inverse; move one the selected modules or functions from "Accessible" to "Restricted".

The double arrow keys operates in a similar way except that the double arrows will move all the functions or module between "Accessible" and "Restricted" regardless of whether or not they where highligted.

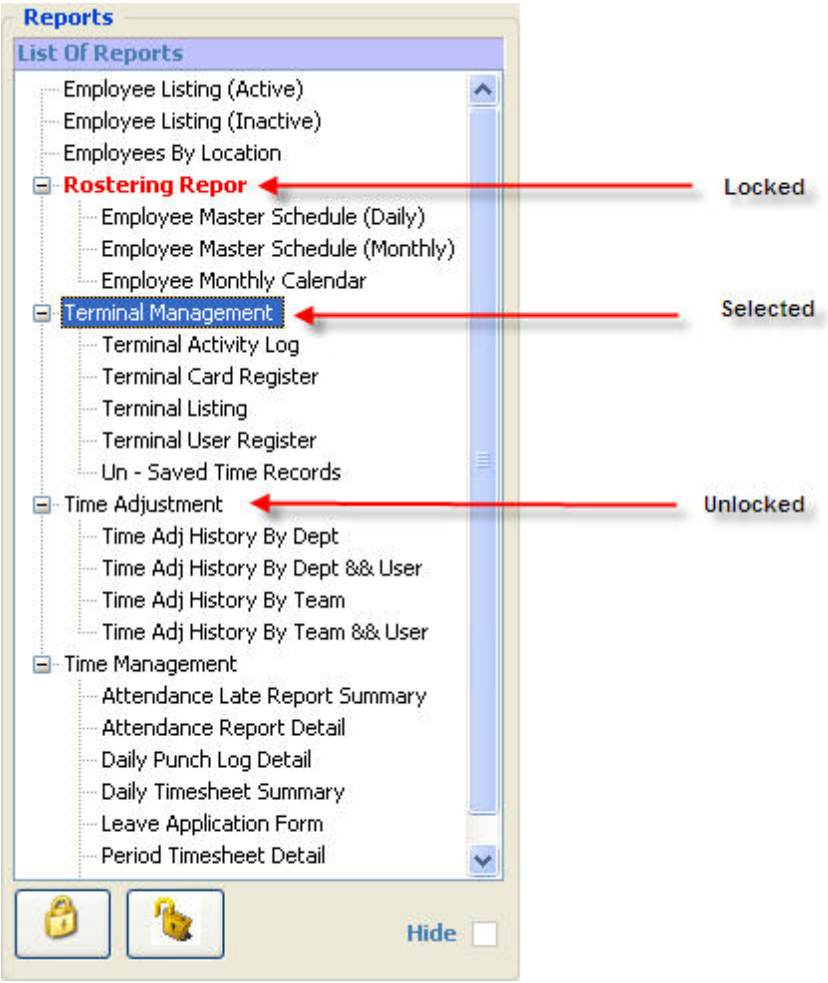
Reports

Reports can either be locked or unlocked. A bold face, red text color font, will indicate that a particular report is lock for a currently selected user group.

To "Lock " or "Unlock" a report for a user group:

1. first select that group from the "Select User Group" for the modification from the drop down menu.

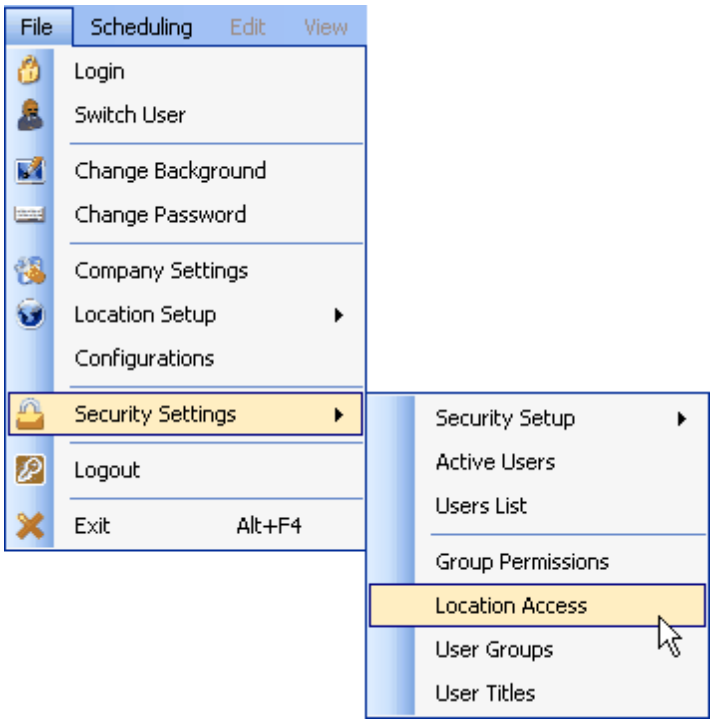
2. Select the report that you like to "Lock " or "Unlock".



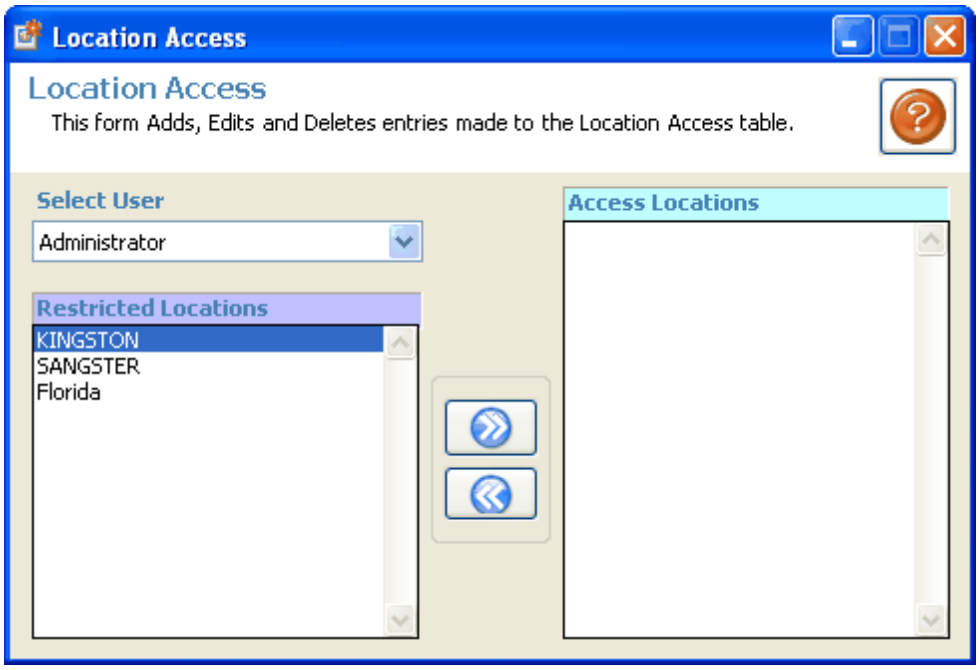
3. Left mouse click the "Lock " or "Unlock" button.

4.1.8.5 Location Access

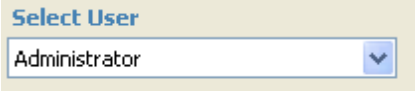
The "Location Access" menu option, under the "Security Settings", when selected will open the "Location Access"" dialog window.



This will allow you to add or remove restriction on a users within system, to access the Schedule Master configured location.



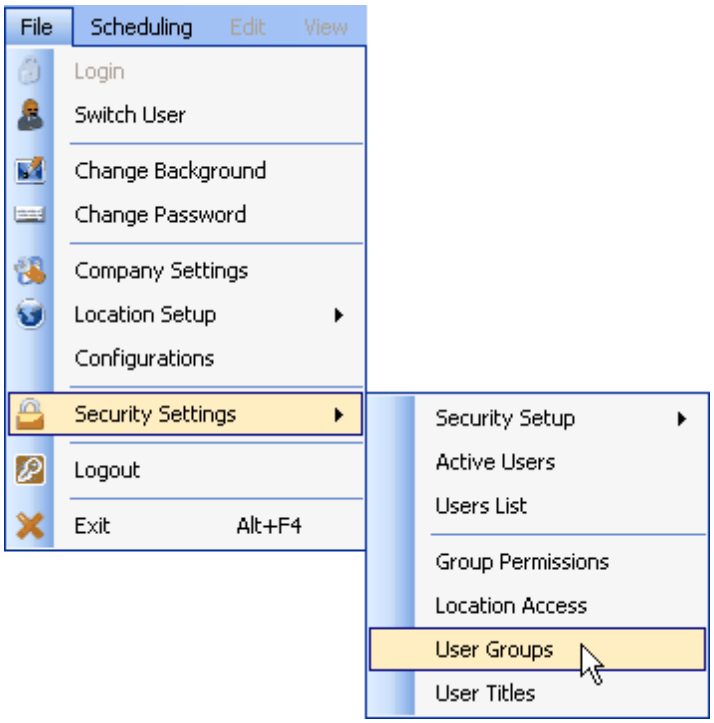
1. First select the user you would like to modify access for.



2. Select a location form either the "Restricted" or "Access" Listview window and use the use the arrows keys to toggle them between both.

4.1.8.6 User Groups

The "User Groups" menu option, under the "Security Settings", when selected will open the "User Groups" dialog window.



Add

1. This dialog window allows you to add, edit, or remove users groups within system. To add a new "User Group" first, left mouse click the "Add New" button.

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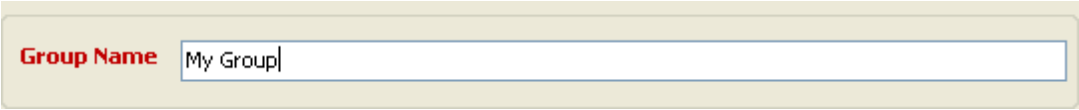
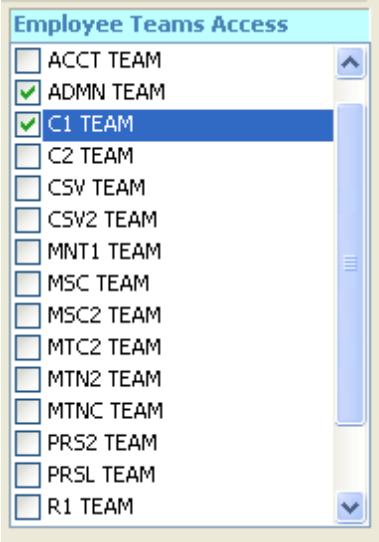
2. Then type in the desired name of the new group inside of the "Group Name" textbox.



3. Check the check-boxes with in the "Employee Team Access" listview for the various team access you would like the new group to have.



4. Finally left mouse click the "Save" or "Save & New" button; and you're done.

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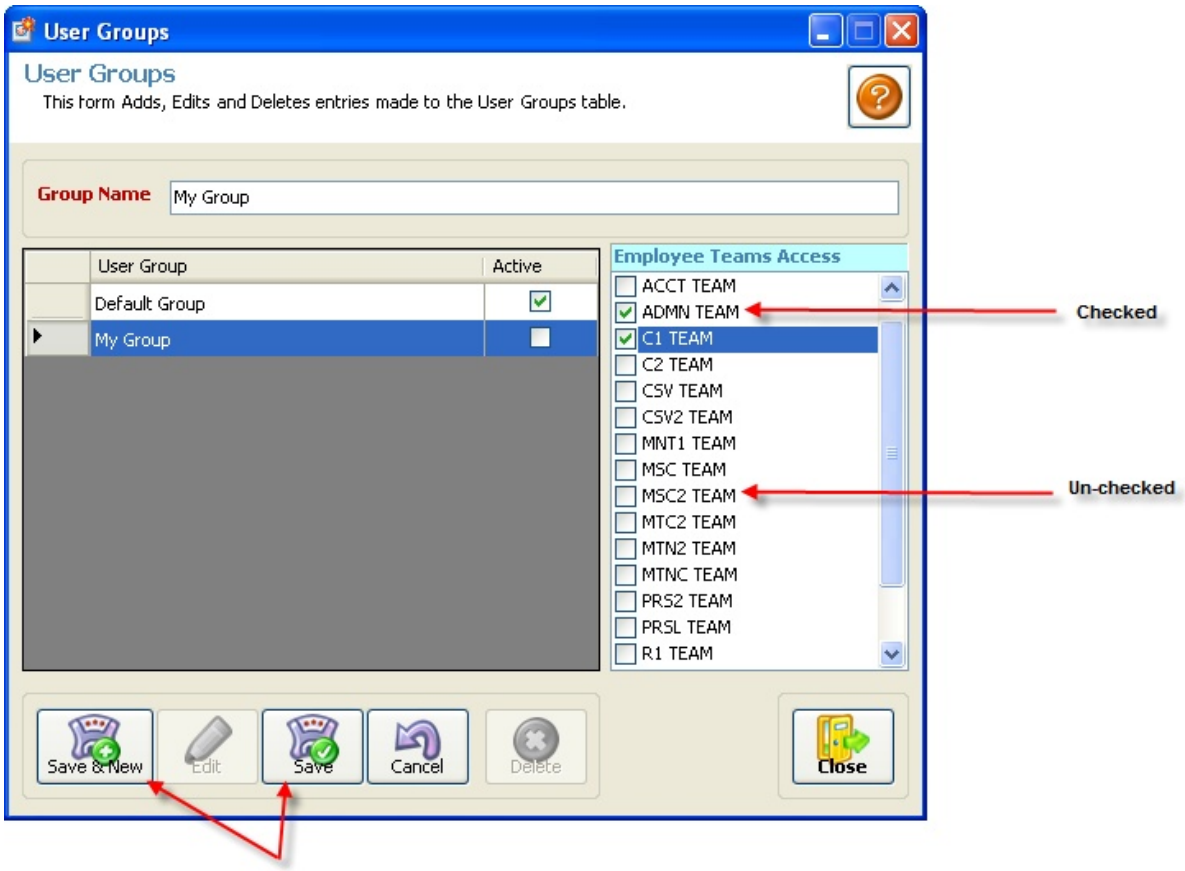
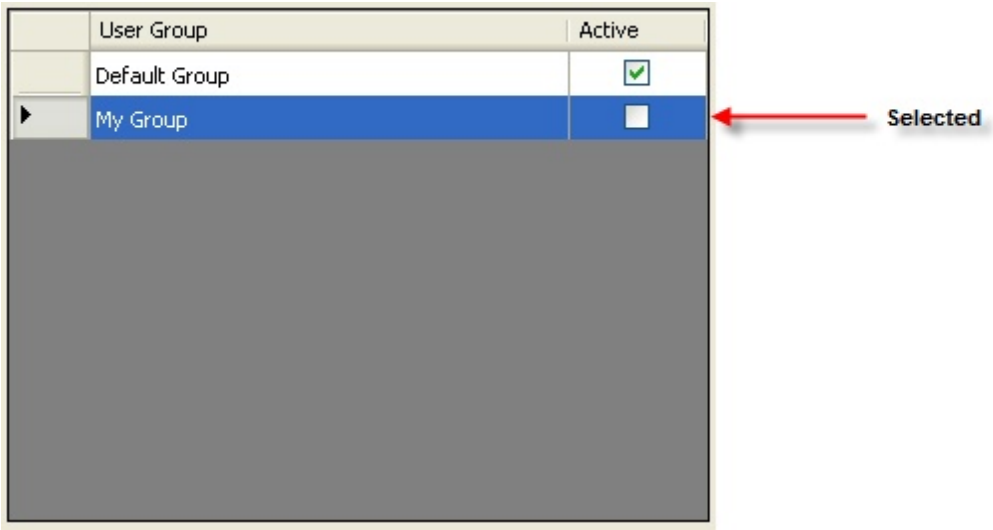


Edit

1. When editing a "User Group", first select the group from the list of user groups in the Listview.



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2. Left mouse click the edit button and proceed to edit the field on the form as desired.
3. When you're finish editing, left mouse click the save button and you're done.

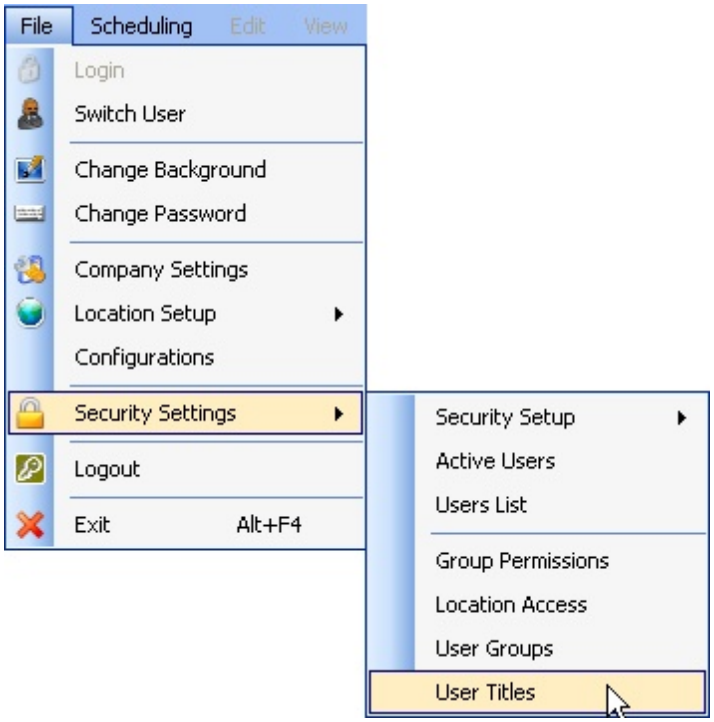
Delete

When deleting a "User Group", first select that user group as outline in the edit section of this topic. Once you have the user group selected, left mouse click the delete button.

A confirmation window will appear, click "Yes" if you want t confirm deleting the user, and "No" if you no longer wish to do so.

4.1.8.7 User Titles

The "User Titles" menu option, under the "Security Settings", when selected will open the "User Titles" dialog window.



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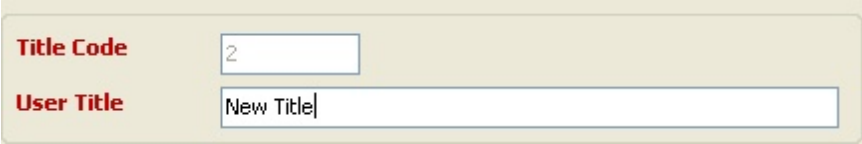
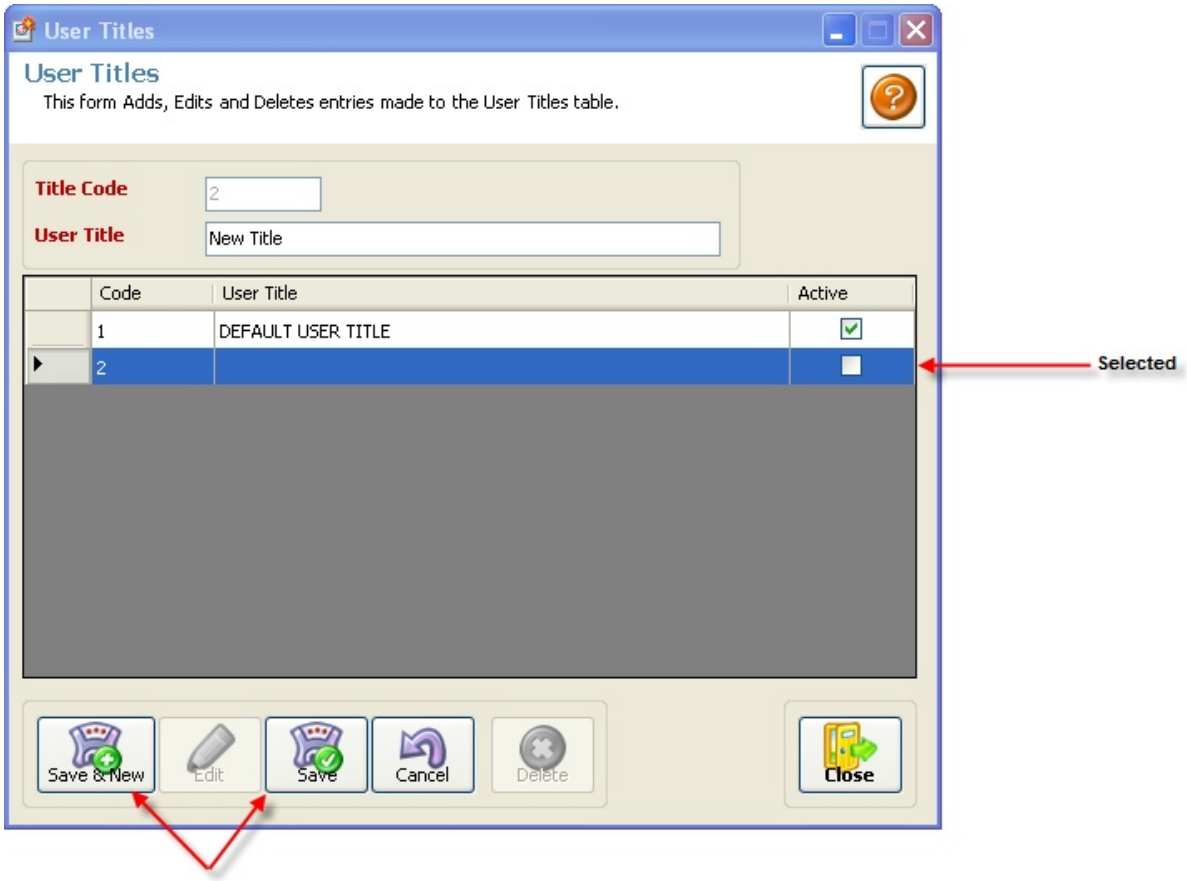
Add

1. This dialog window allows you to add, edit, or remove users titles within system. To add a new "User Title" first left mouse click the "Add New" button.

2. Proceed by typing in the desired name of the new title inside of the "User Title" textbox.

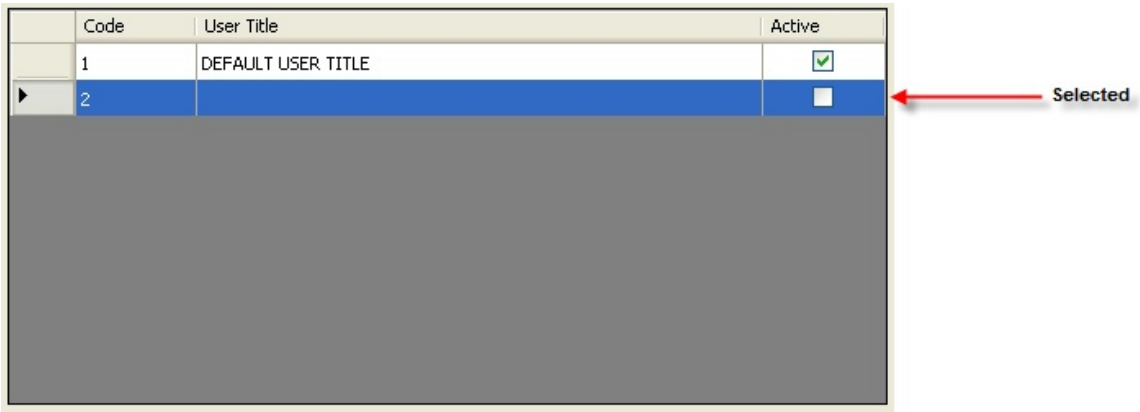


3. Finally left mouse click the "Save" or "Save & New" button; and you're done.



Edit

1. When editing a "User Title", first select the title from the list of "User Titles" in the Listview.



2. Left mouse click the edit button and proceed to edit the field on the form as desired.
3. When you're finish editing, left mouse click the save button and you're done.

Delete

When deleting a "User Titles", first select that user group as outline in the edit section of this topic. Once you have the user group selected, left mouse click the delete button.

A confirmation window will appear, click "Yes" if you want t confirm deleting the user, and "No" if you no longer wish to do so.

4.1.9 Logout

This option lets you safely exit the program and saves the screens and changes made to the information. This also leaves the prompt open for another user to access the system using their assigned login.

4.1.10 Exit

This option closes the program and logs off the current user. For another person to use

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the system they will be required to open the program and log in.

4.2 Scheduling Menu

This feature in Schedule Master Pro allows the administrators to create and monitor a schedule or roster for team members. The Schedule Properties module allows for the user to maintain various schedules and even manipulate the time frame in which the schedules fall.

You are able to create a static roster - which covers a specific time period, as well as a rotation roster where the schedule can be alternated weekly.

Before creating a schedule the following has to be in place on the system:

Employee Listing

Assign Employee Team

To create a new schedule:

Select Schedule then New Schedule.

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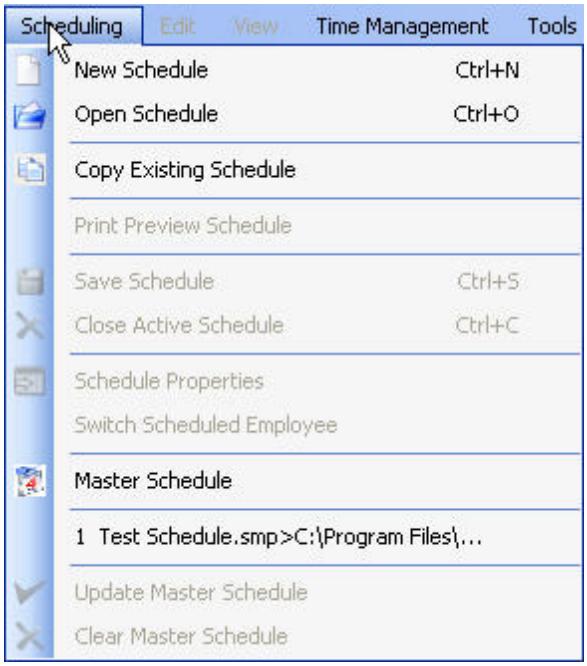
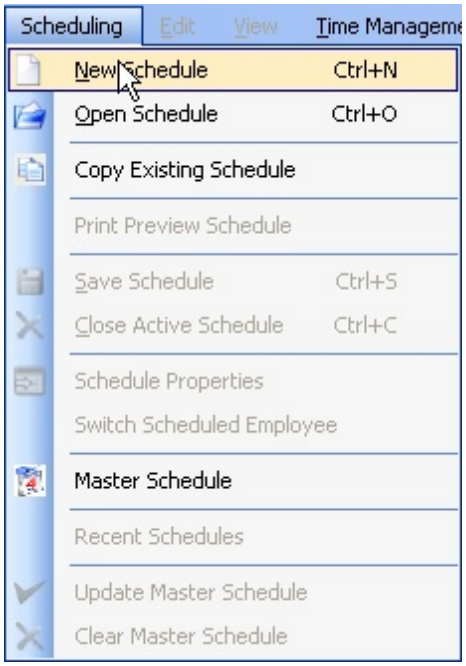


4.2.1 New Schedule

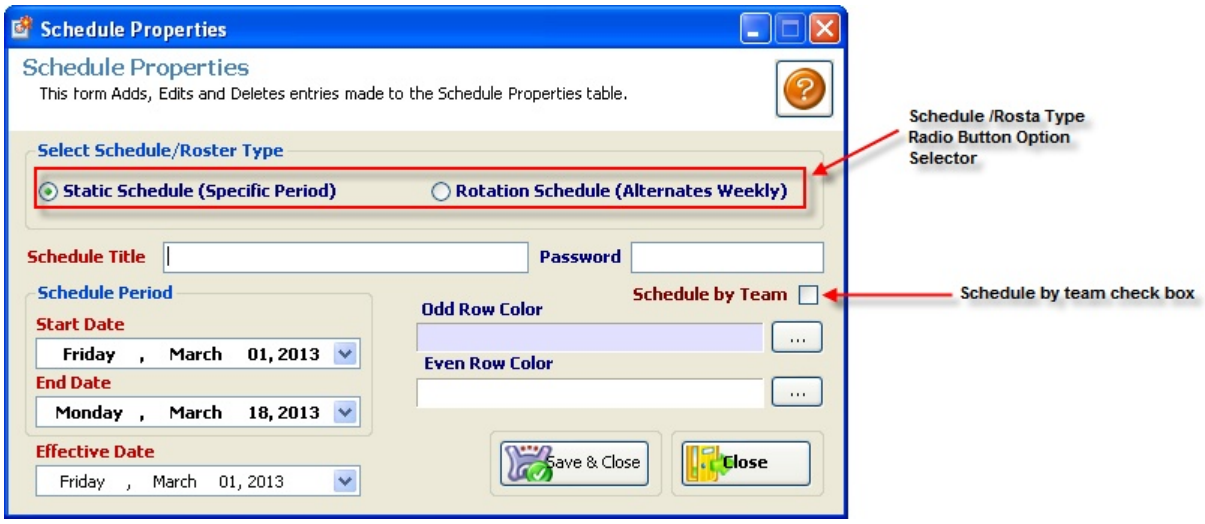
Adding a new schedule into the system is easily done through the "Schedule Properties" dialog. You get to this dialog by navigating to the "Main Menu", and under the "Scheduling" heading, find and click the "New Schedule" menu option.



Once properly selected the "Scheduling Properties" dialog will appear similar to the one

shown in figure 3. below. There are two (2) types of "Schedule" / "Roster"; **Static - Specific Period** and **Rotation - Alternates Weekly**. The Static - Specific Period allows the schedule to start and end for a specified period, while Rotation - Alternates Weekly will create a schedule with a indefinite end period. You may select between the two by selecting between the radio option selectors with the same name.

Figure 3.



The schedule by team check box allows you to create a schedule using teams instead of individual employees. Check this box when creating a new "Schedule" or "Roster" if you desire the new schedule to schedule employees base on teams they are apart of. See Work Team to schedule by team

The "Schedule" / "Roster" can be saved with a password; this is achieved by supplying a password into the "Password" textbox field.

4.2.2 Open Schedule

Once schedules are created, each will be saved in a folder on the C: Drive of the host computer. To open a schedule for maintenance, select the folder in which it was last saved. After identifying the schedule, simply double click.

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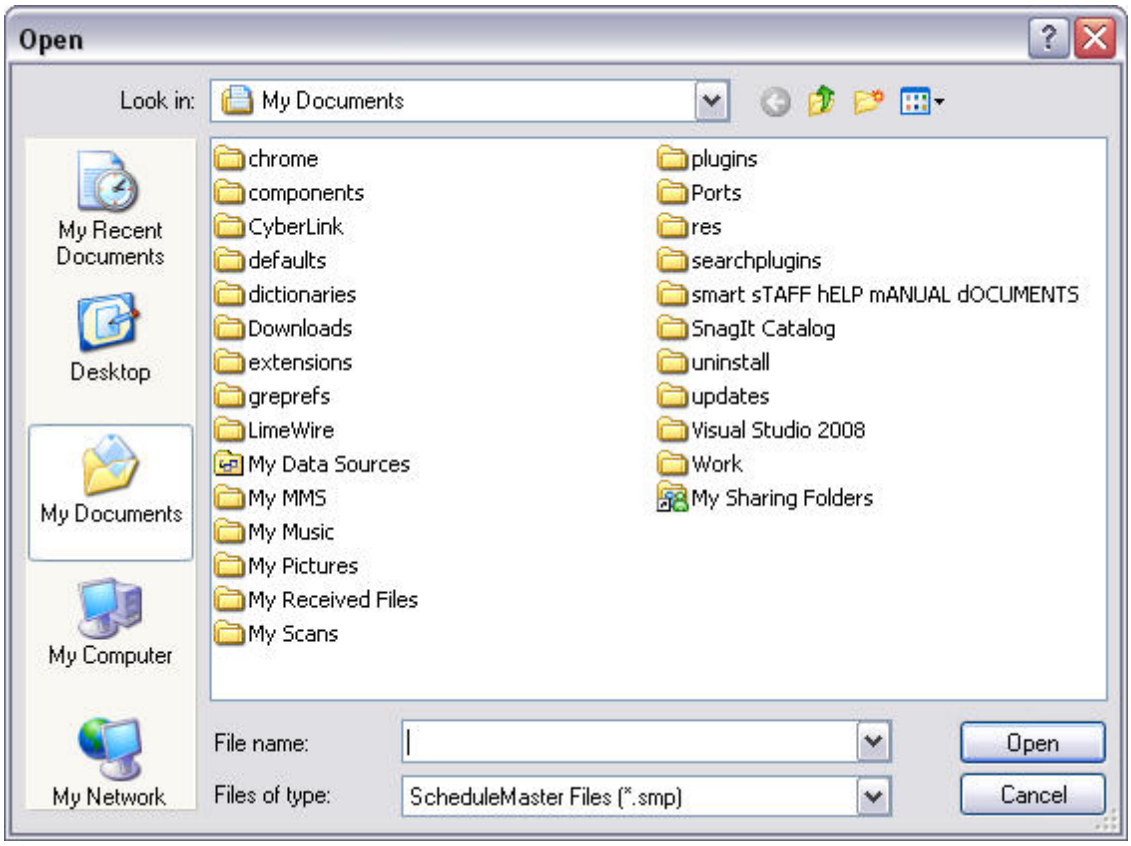

4.2.3 Copy Existing Schedule

You can easily create a new "Schedule" / "Roster" from a pre-existing one. You achieve this by executing the following steps:

1. Navigate to the "Main Menu" and select "Scheduling". Under the "Scheduling" drop down, navigate and select "Copy Existing Schedule".

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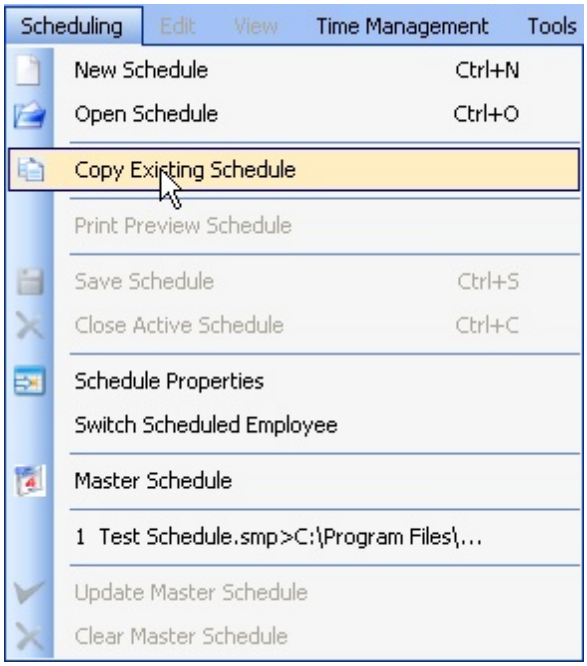
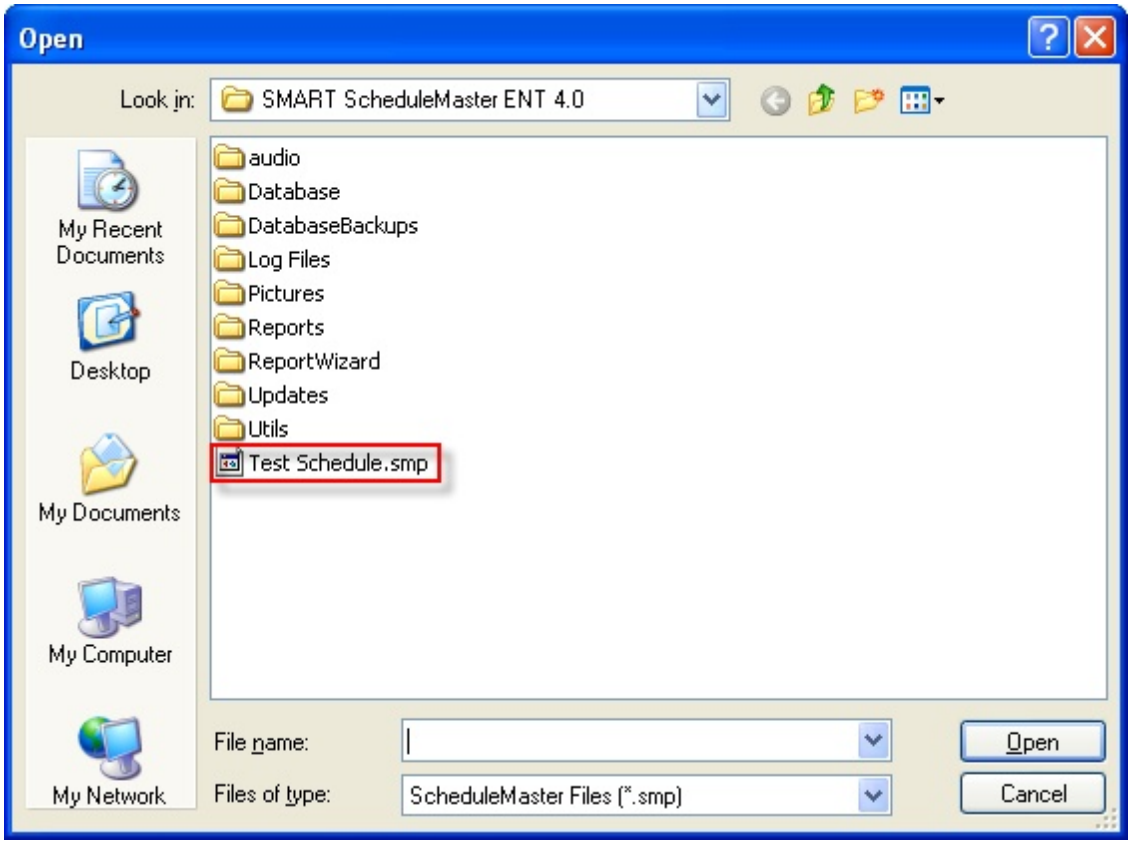


2. A "Open" file dialog would have now appeared on your computer screen. Locate and select the existing schedule file that should ends with a (*.smp) file extension, then left mouse click the "Open" button on the "Open" file dialog



Related Topics

New Schedule

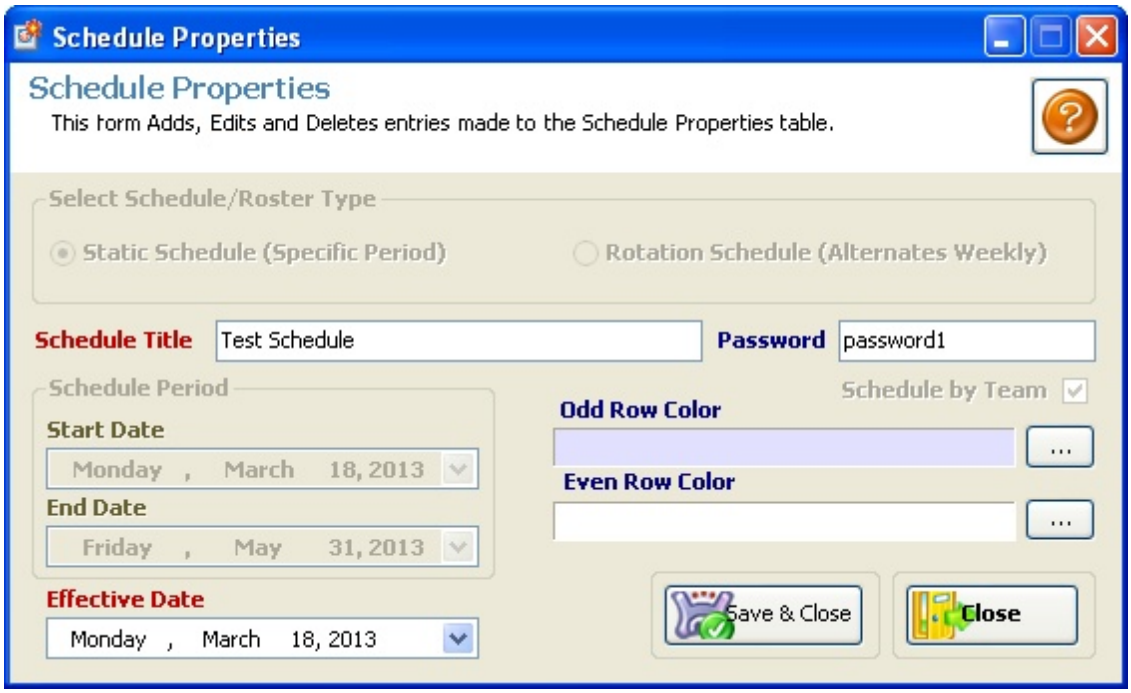
4.2.4 Print Preview Schedule

4.2.5 Close Active Schedule

Enter topic text here.

4.2.6 Schedule Properties

The "Schedule Properties" menu option located under the "Scheduling" heading on the main menu will open the "Schedule Properties" dialog window.



The "Schedule Properties" dialog window allows you to edit the Password, Name, Effective Date and the Alternating Rows color of the currently or last opened "Schedule" / "Roster".

4.2.7 Switch Scheduled Employee

Enter topic text here.

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4.2.8 Master Schedule

4.2.9 Update Master Schedule

Enter topic text here.

4.2.10 Clear Master Schedule

Enter topic text here.

4.3 Time Management Menu

The Time Management Module speaks to various topics including:

1. Punch Clock
2. Daily Shift Override
3. Clocked-In/Out Staff etc.

4.3.1 Punch Clock

This screen is the main login for all employees. This appears initially when an employee is about to punch in for their shift.

The employee is required to type his/her name and the password created for login purposes.

After providing the necessary information, the employee should select the punch clock button. In the event of an error, whether in the typing of the password or user name, selecting the clear screen option, allows the user to clear the slots and begin again.

If a user is late, this screen may prompt for a supervisors password. This means that a supervisor must submit his/her password before the user can go any further.

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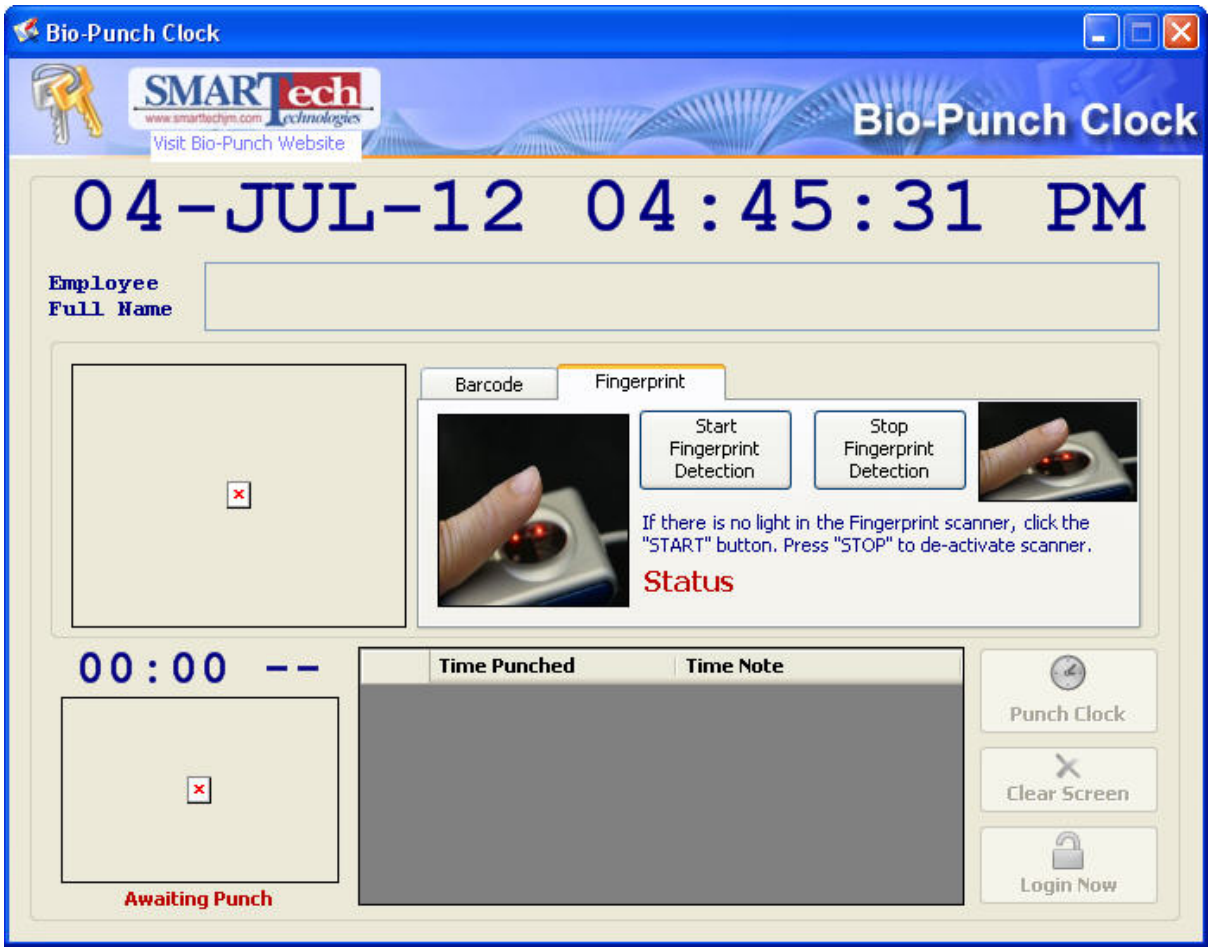

4.3.2 Override Punch Times

The Override Punch Times Module allows any user in a supervisor position to an employee's time sheet or punch times.

To add or edit an existing punched time the user must first select the date in question. After doing so, he/she can then change the date, note the time punched and the date of the actual clock in.

To delete an override or a pre-existing punched time, the user must select the appropriate date, then click the delete button.

Select the close button to complete the transaction and return to the previous menu.

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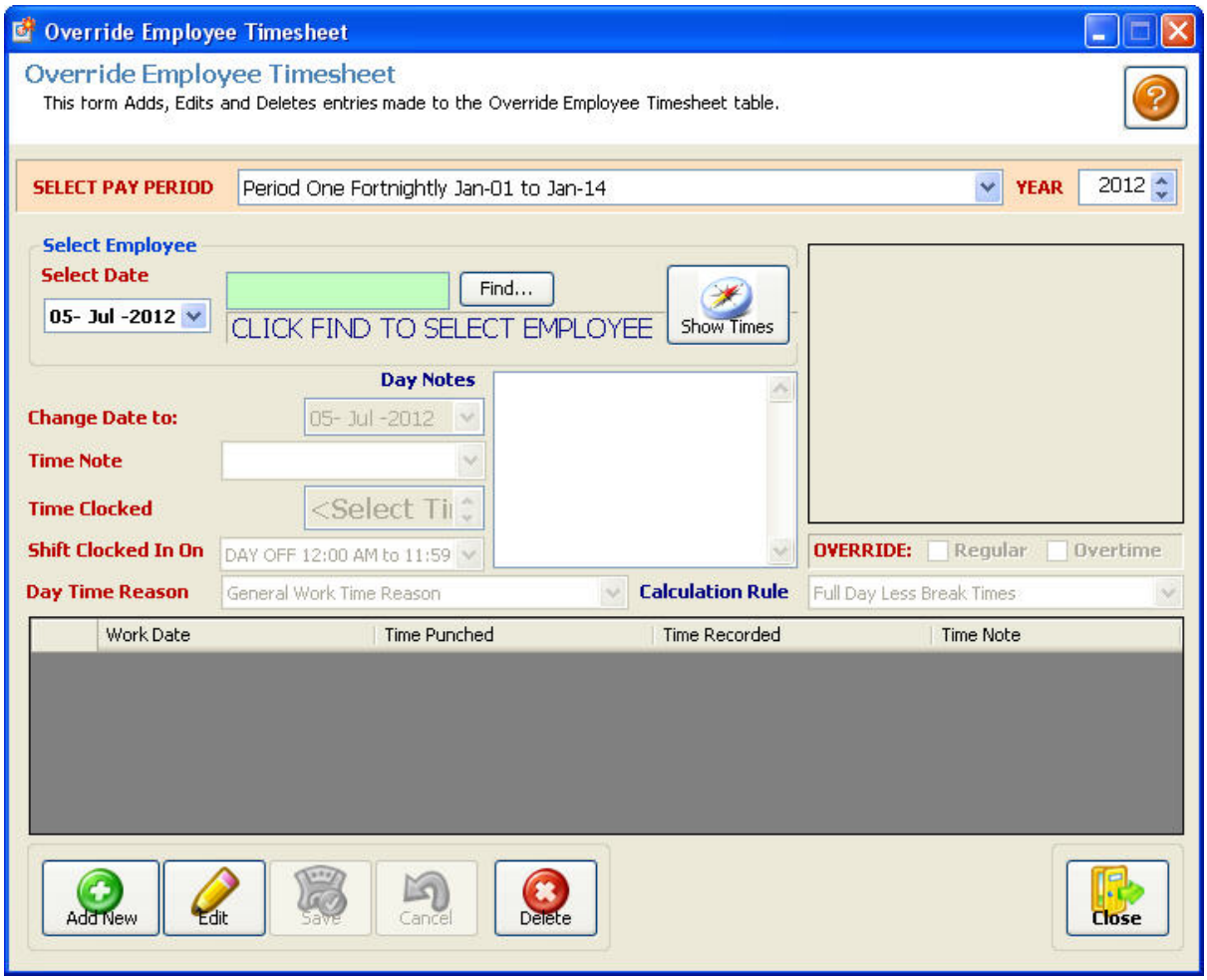

4.3.3 Employee Shift Override

The Employee Shift override menu allows the user to maintain individual employee shifts or punched time.

After clicking the "Find" button, a second window will pop up listing all employees in the database. Select the number assigned to the employee, by double clicking on the row. Th employee number will then appear in the "Find" slot. Select the add new button. The user can then adjust the Work Period Start and End and the New Shift for Period. After making all the necessary adjustments, click save and close to return to the previous menu.

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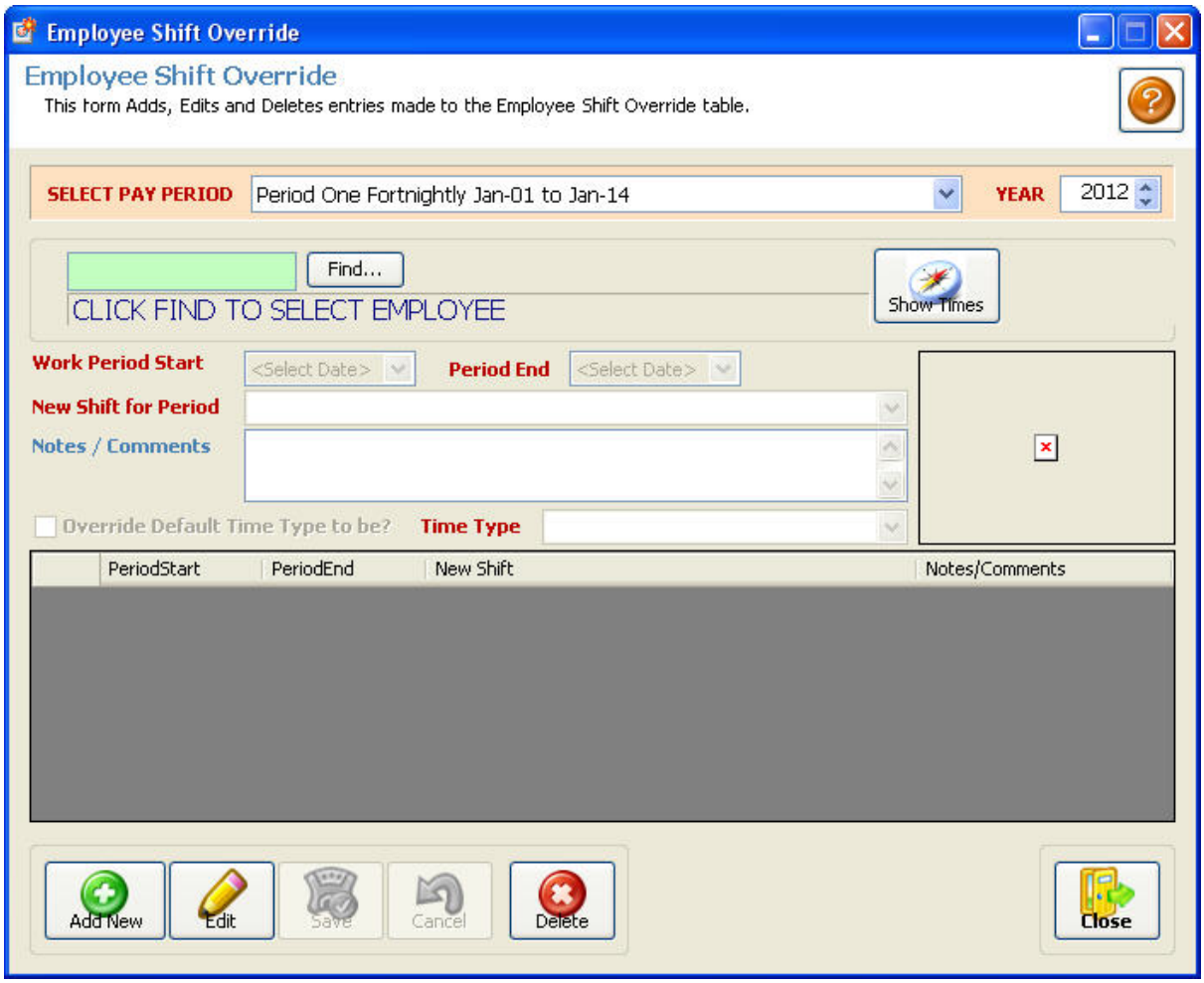

4.3.4 View Clocked-In/Out Staff

This module list the staff members that have clocked in or out on the date selected.

On the Change Clock In/Out Date drop down menu, select the date to query, from there click the refresh employee list. The list will be refreshed listing the employees by order of their employee number.

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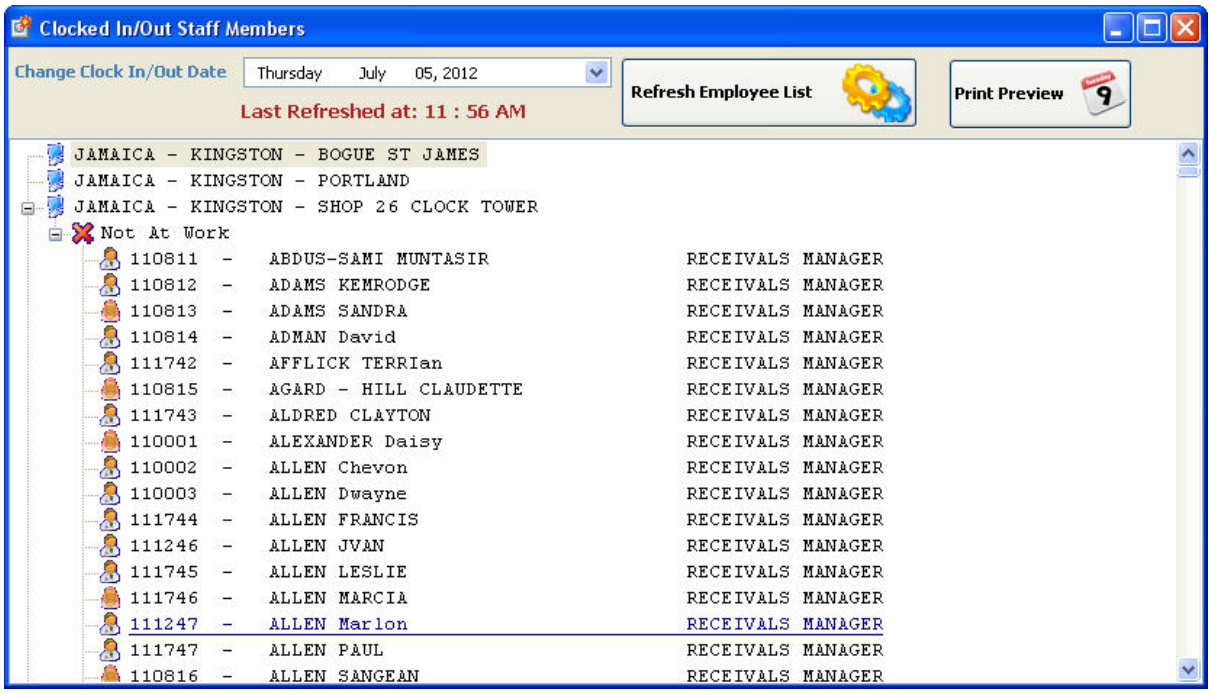

4.3.5 Attendance/leave Log

The Attendance/Absence Log allows the user to view, edit and print an absent report for each employee.

To the top of the screen, there is a database of the current employees, listed in numerical order. After identifying the employee on question, click the corresponding row. All dates relating to the employee will appear in the empty table below the menu.

To edit or make changes to a logged absent day, click on the specific date, then the edit button.

The following slots are then filled in with the necessary information for adjusting:

1. Start Date
2. End Date
3. Reason
4. Number of Days

Adjust as necessary then select the save and close button to return to tech previous menu.

To log a new absent day on an employee, simply identify the employee, then select the

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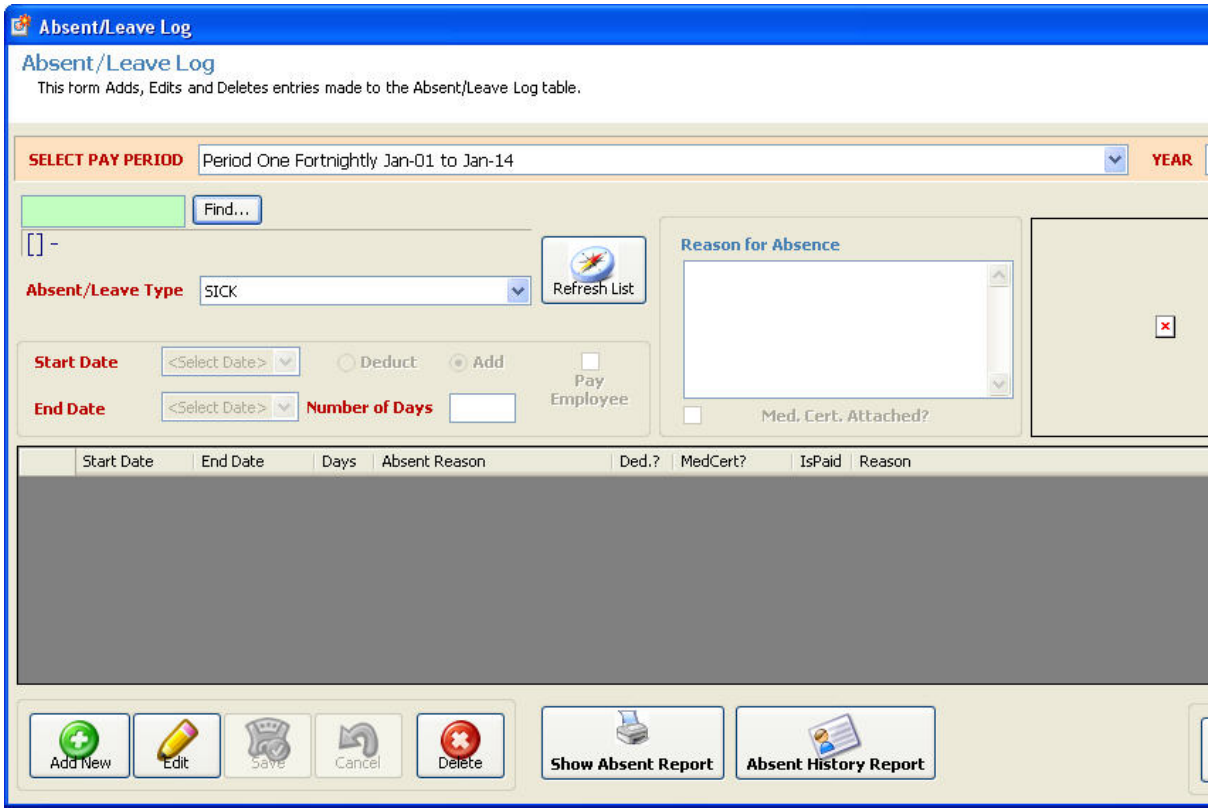
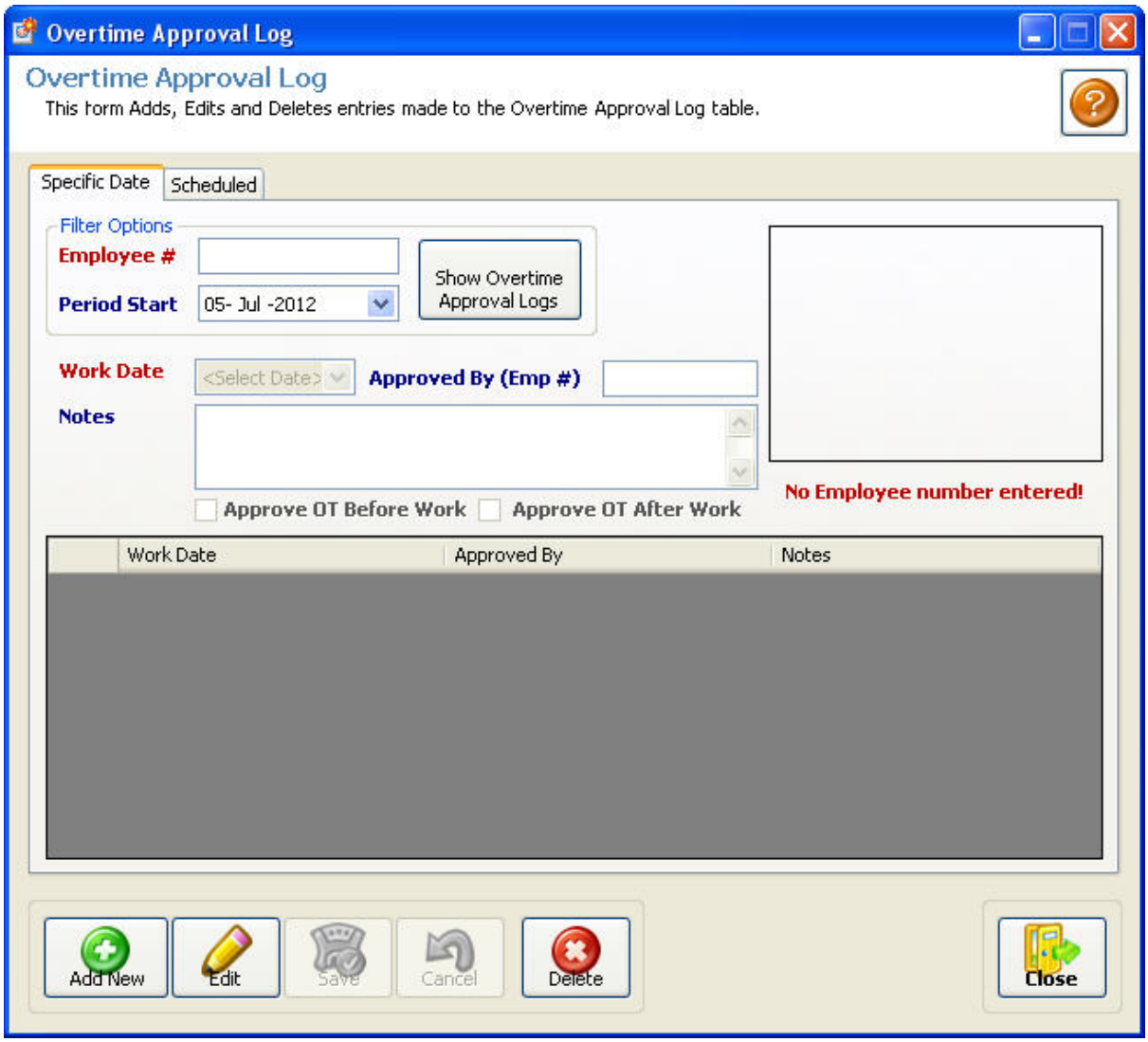
"Add New" button. After inputting the necessary information, click the save and close button to return t the previous menu.



4.3.6 Approved Overtime Log

This module has two menus. The user maintains the approval of overtime logs here by making adjustments in either the specific date or Scheduled Menu.



4.3.6.1 Specific Date

The Specific Date menu allows the user to view the approved overtime logs for each employee by selecting the employee number, a period to search from, by selecting the date and clicking the Show Overtime Approval Logs button.

To add a new approval log for the employee, the user must first select the Add New button. After the supervisor selects the date and types in his/her employee number, the supervisor may leave a notation. By selecting within the appropriate box, the supervisor may approve the over time before or after work.

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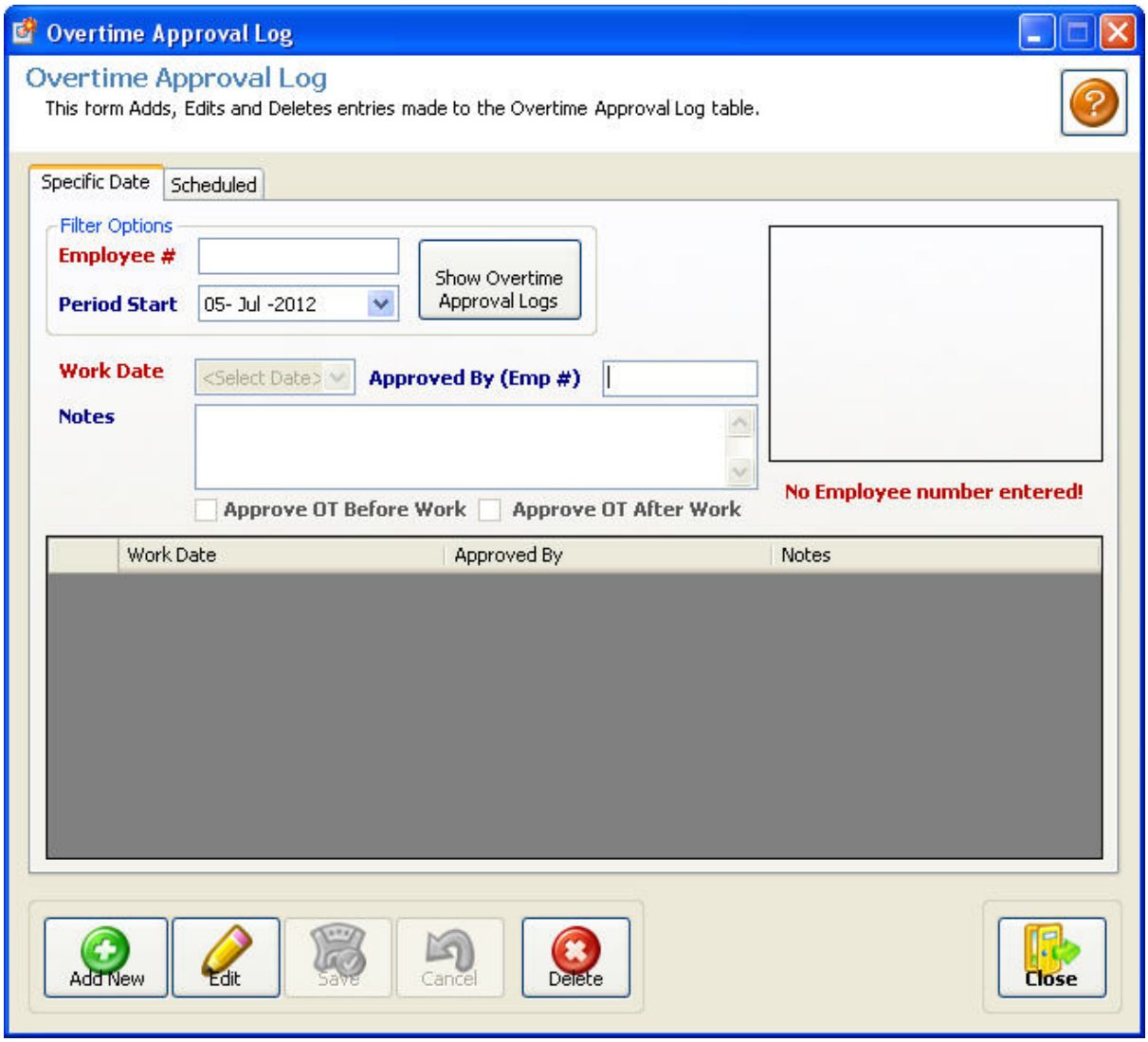
Select the close button to return to the previous menu.



4.3.6.2 Scheduled

The Schedule menu allows the user to create the shift or scheduled times for an employee.

Click the Add New button. The user will then be prompted to insert the employee number. After doing so, by ticking in the boxes beside the corresponding dates, select the days assigned to the employees schedule. Click save to register changes to the employee's schedule.

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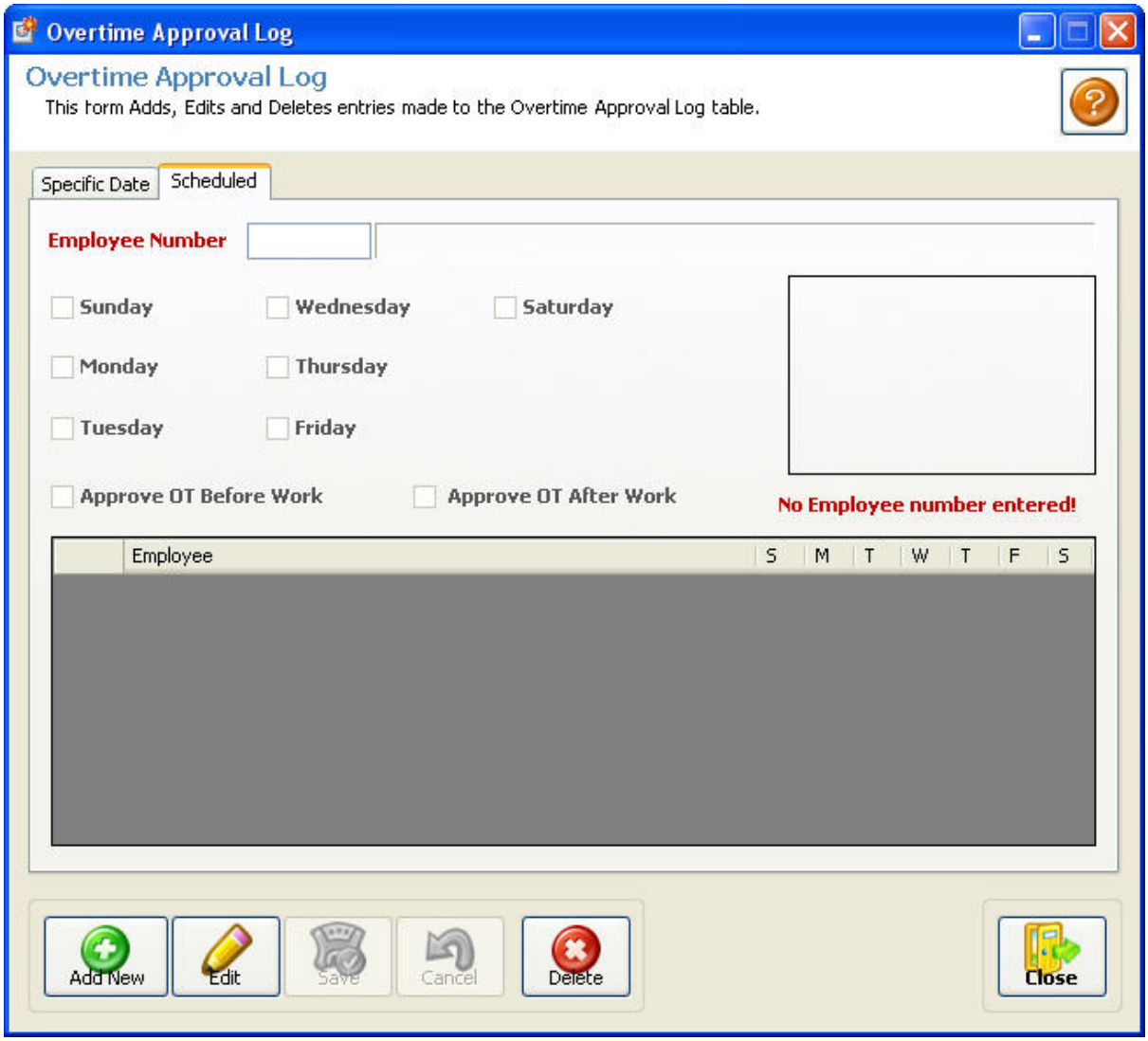
To edit an employee's schedule, select the edit button, insert the employee number and select or deselect the corresponding days to amend the previous schedule.

In the even that the user would like to delete an existing schedule, after inserting the employee number, click the delete button. Hit the Save button to save changes an return to the previous menu.



4.3.7 Produce Time Sheet Report

The Produce Time Sheet Report module generates detailed reports on an employee's schedule during a specific time period.

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In the Employee Selection Table, select "Clear All Employees." By selecting or de-selecting the employee type, the user is providing specified fields to include in the report.

In the Select Reporting Period table, select the time period during which the report is to be generated. Select "Calculate Time sheet."

Depending on the report that is desired, the user may select from one of the following:

1. Detail Punch Log Report
2. Punch Log Summary
3. Export Report to Microsoft Excel

4.3.8 Change Clock-In Password

This module allows the users to maintain any changes to the employees' clock-in passwords.

From the employee table listed below, select the desired employee by clicking on the row. There are four types of passwords that may have been saved, these include:

1. Manual Entry Password
2. Barcoded Password
3. Swipe Card Password

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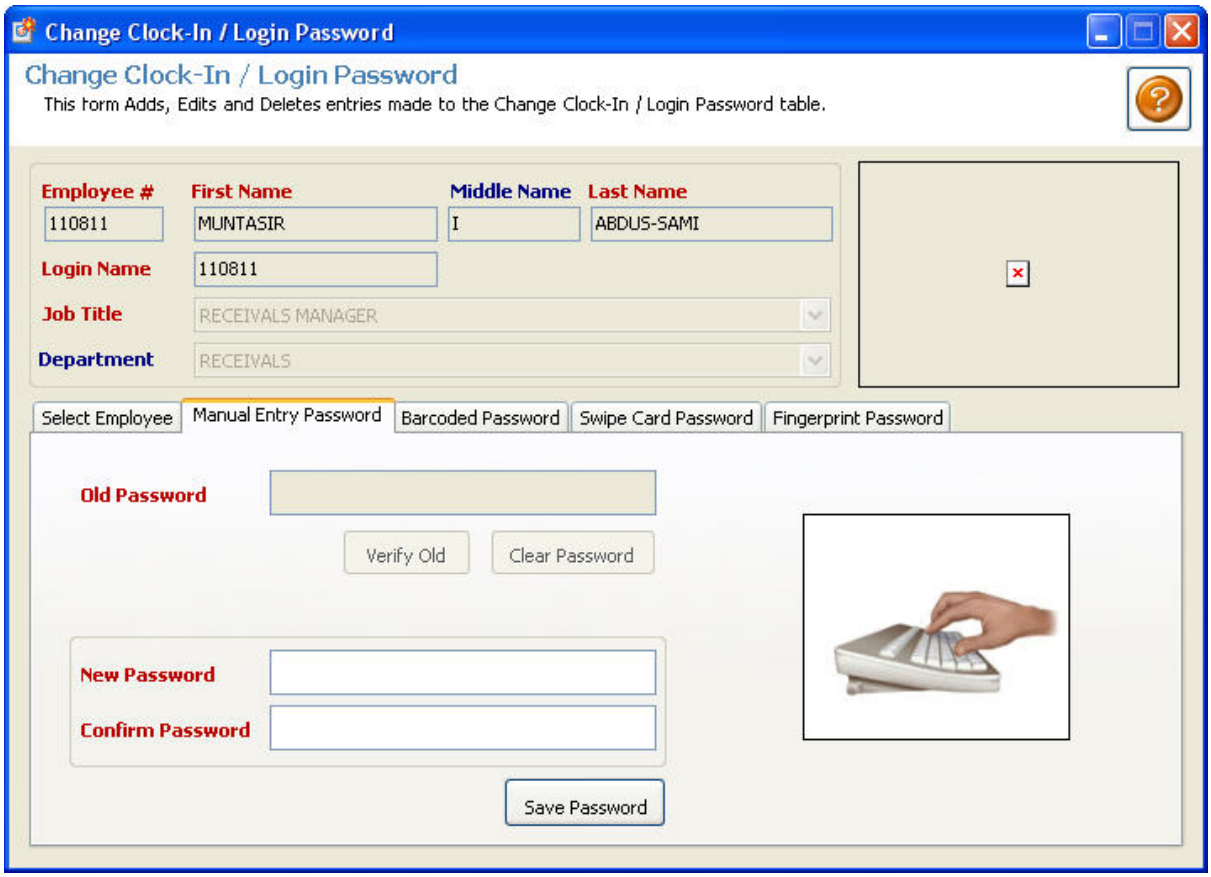
4. Fingerprint Password

Select the method of entry or the type of password to be changed. Further instructions can be found in the ensuing topics.

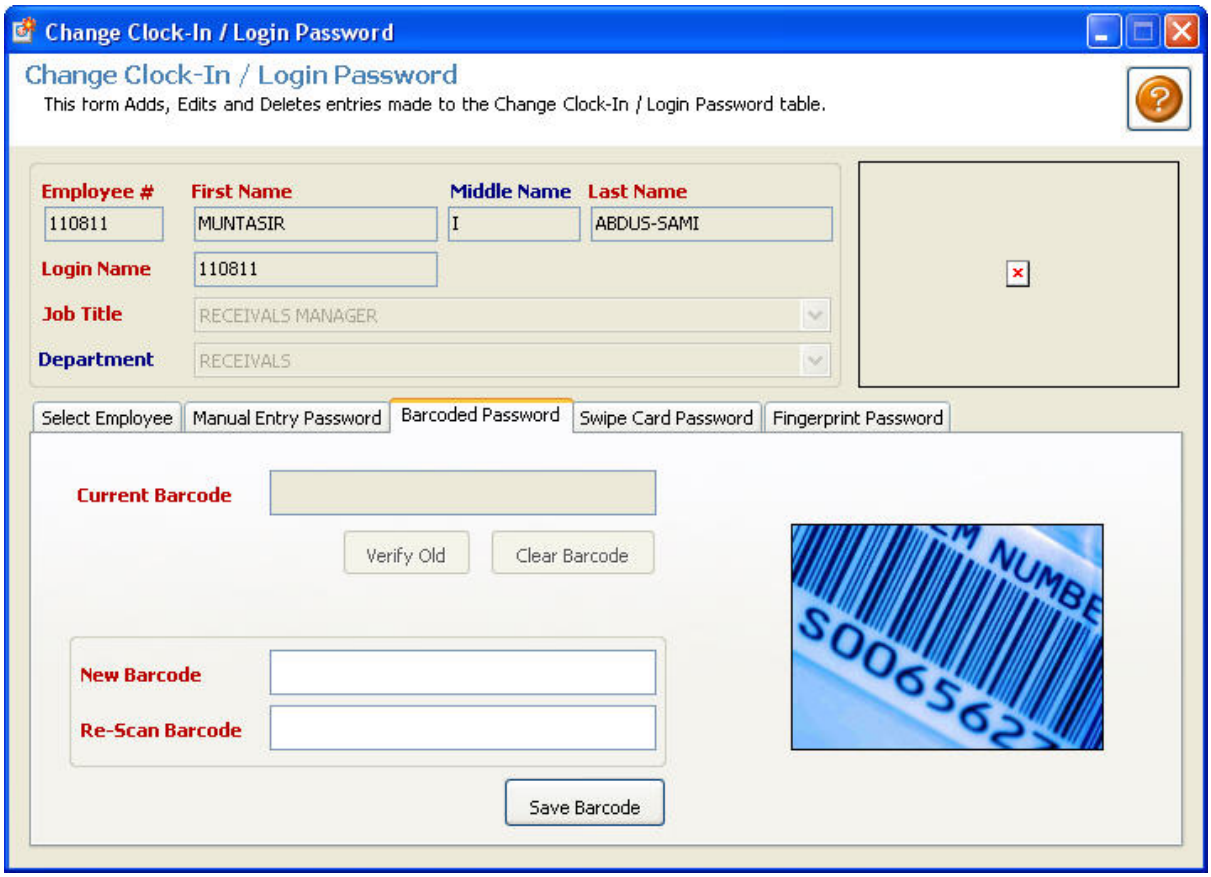
4.3.8.1 Manual Entry Password

1. Enter the employees old pass word.
2. If the password is correct select the "Verify Old" button, if the the employee made an error, select, "Clear Password."
3. In the slot, New Password, have the employee type the new password.
4. Tab to the next slot, Confirm Password, retype the password.
5. Click "Save Password."



4.3.8.2 Barcoded Password

1. In the "Current Barcode" slot, enter the employees old password.
2. If the password is correct select the "Verify Old" button, if the the employee made an error, select, "Clear Barcode."
3. In the slot, New Barcode, have the employee type the new password.
4. Tab to the next slot, Re-Scan Barcode, retype the password.
5. Click "Save Barcode."



4.3.8.3 Swipe Card Password

1. In the "Current Swipe Card" slot enter the employees old password.
2. If the password is correct select the "Verify Old" button, if the the employee made an error, select, "Clear Swipe Card."
3. In the slot, New Swipe Card, have the employee type the new password.
4. Tab to the next slot, Re-Swipe the Card, retype the password.

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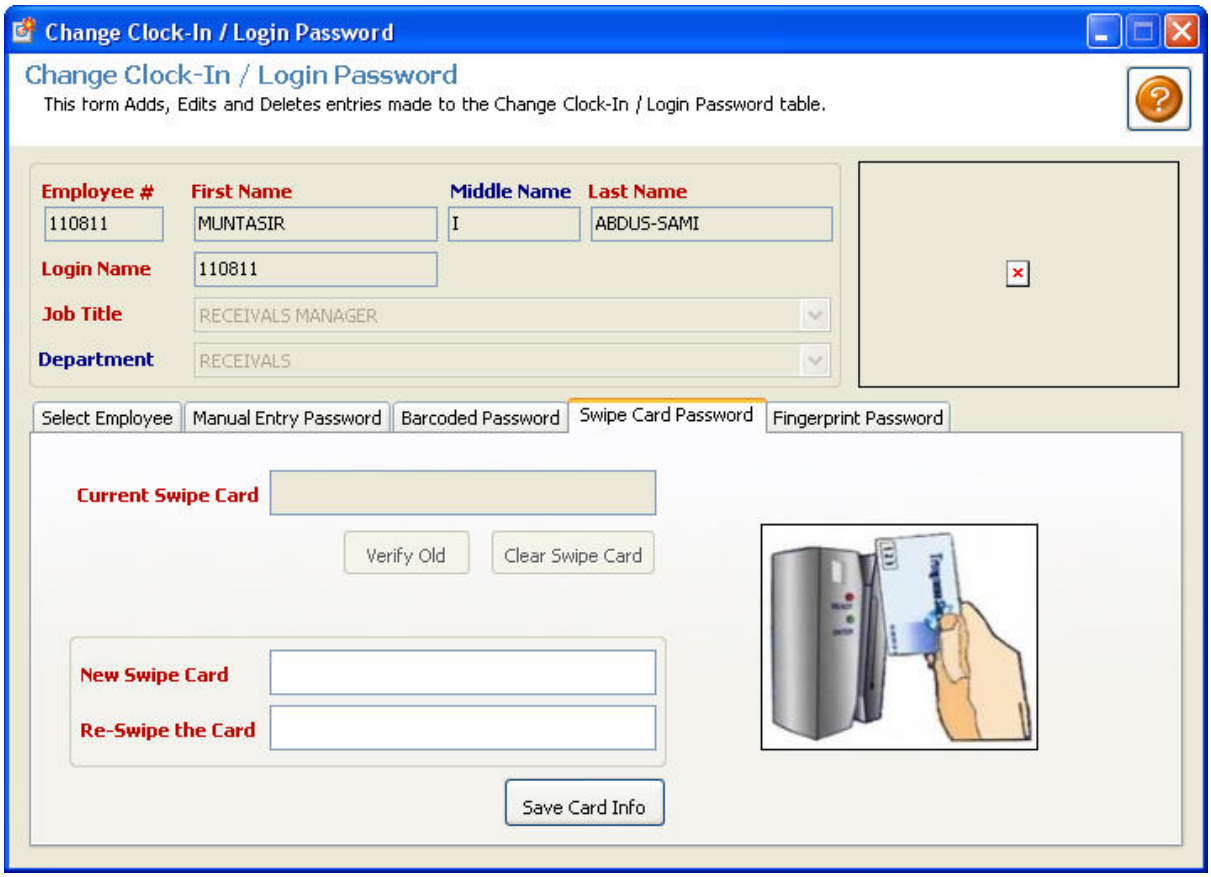
5. Click "Save Card Info."



4.3.8.4 Fingerprint Password

In this menu the user has three options with relations to the employee's finger print.

These would be, in the user needs to"

1. Register a new fingerprint
2. Update an existing fingerprint
3. Delete an existing fingerprint

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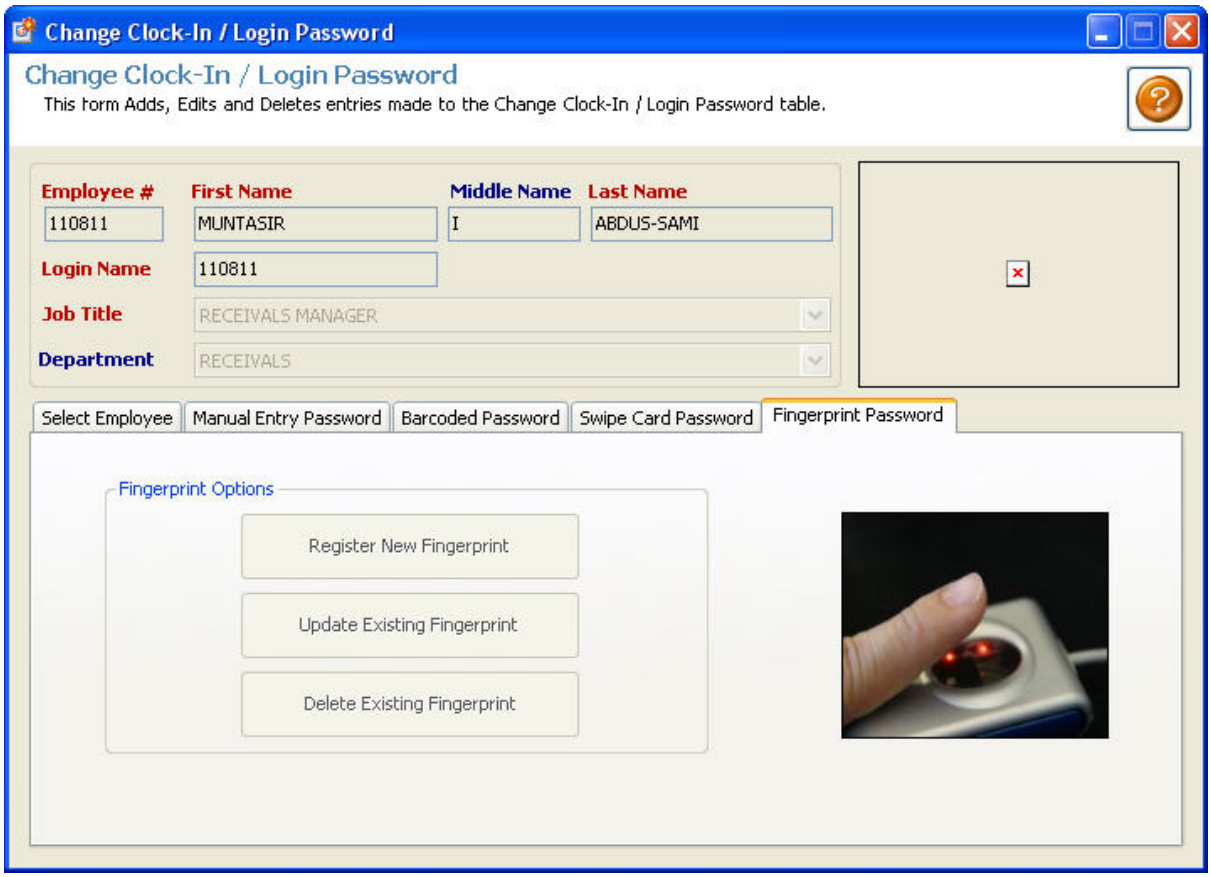

4.3.9 Auto Log Employees

This menu allows the user to maintain employees in a log. The time sheet is populated after the user selects the employee(s) and the days the time sheet should be populated for.

Select Add New, type the employee number. Select the days to be generated in the time sheet. Then click the "Auto Populate Time sheet" button.

To edit the employees to be generated on the time sheet, click Edit. Insert the employee number of the correct member of staff, the days to be populated and select the "Auto Populate Time sheet" button.

With the employee already selected from the table, select the Delete button to remove an employee from the list for time sheet generation.

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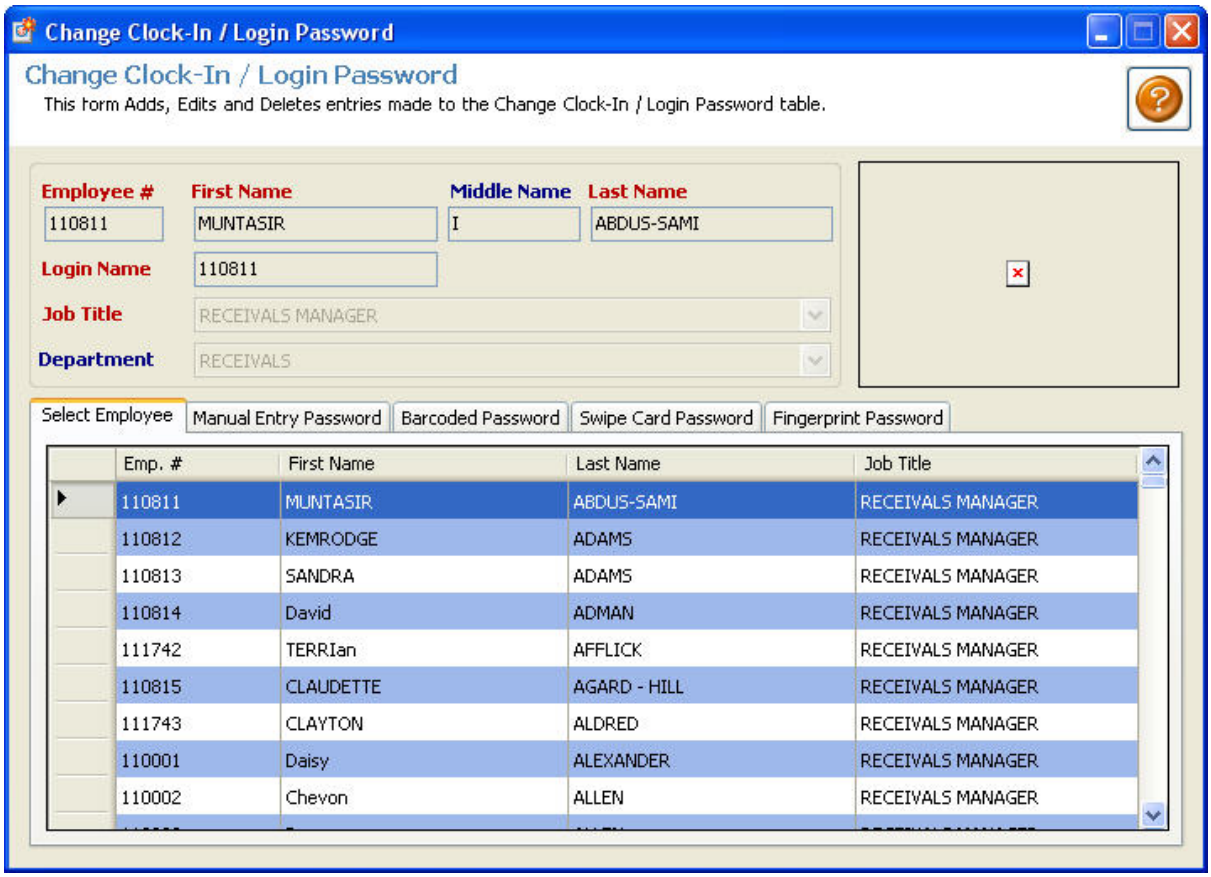

4.3.10 Time Settings Setup

This menu allows the user to create and manipulate time settings such as Public Holidays and Shift Breaks.

See breakdown on time settings in topics below.

4.3.10.1 Holidays

This menu allows the user to create all major or public holidays by completing the following steps:

1. Type in the Holiday year.
2. Select Add New.
3. Type the name of the Holiday e.g. Labor Day.
4. Select the date on which the holiday occurs.
5. Type a small description (optional).

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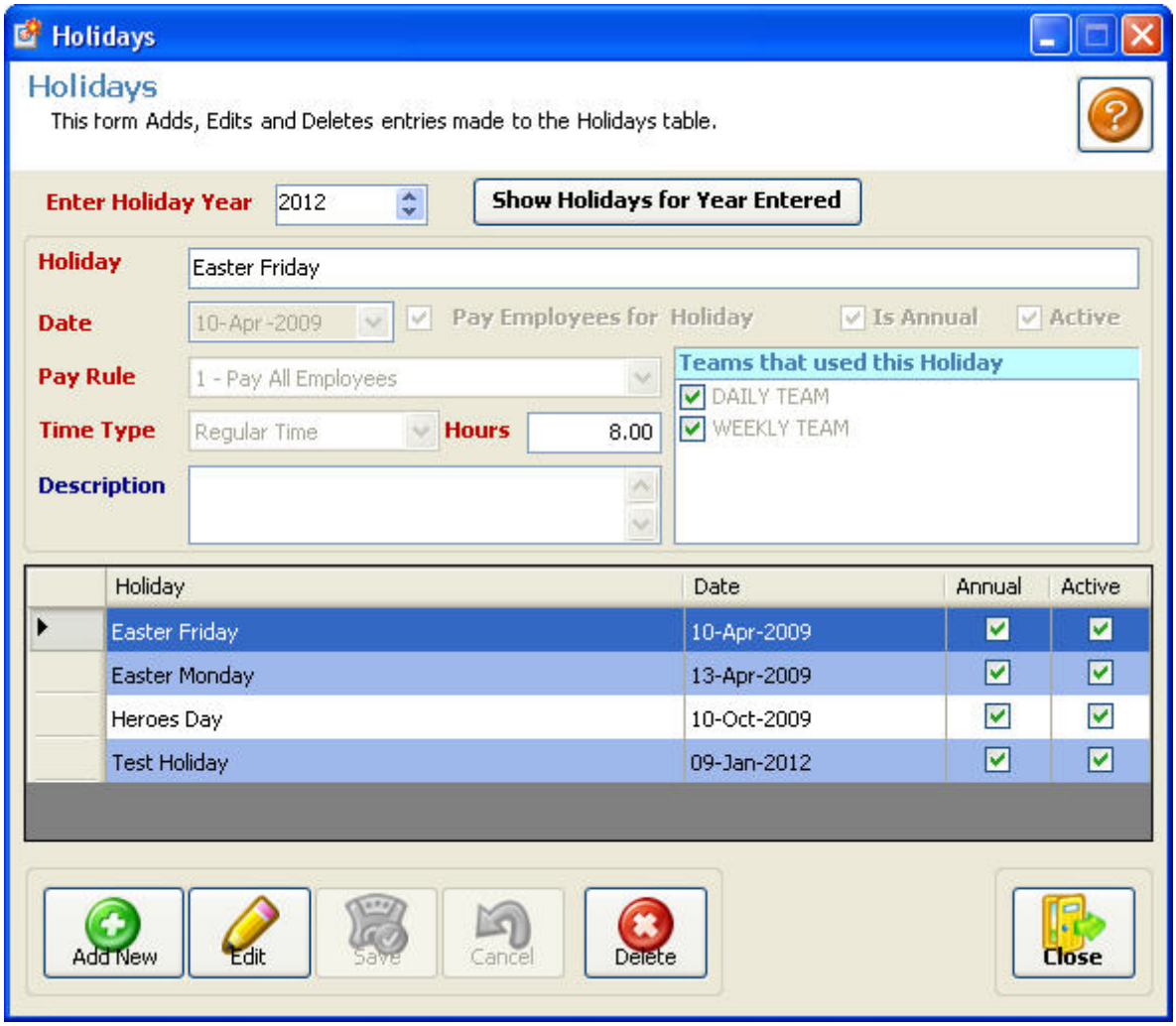
6. Click Save and Close to return to the previous menu.



4.3.10.2 Time Types

The Time Types Menu allows the user to create various times, applicable to the shift or employees.

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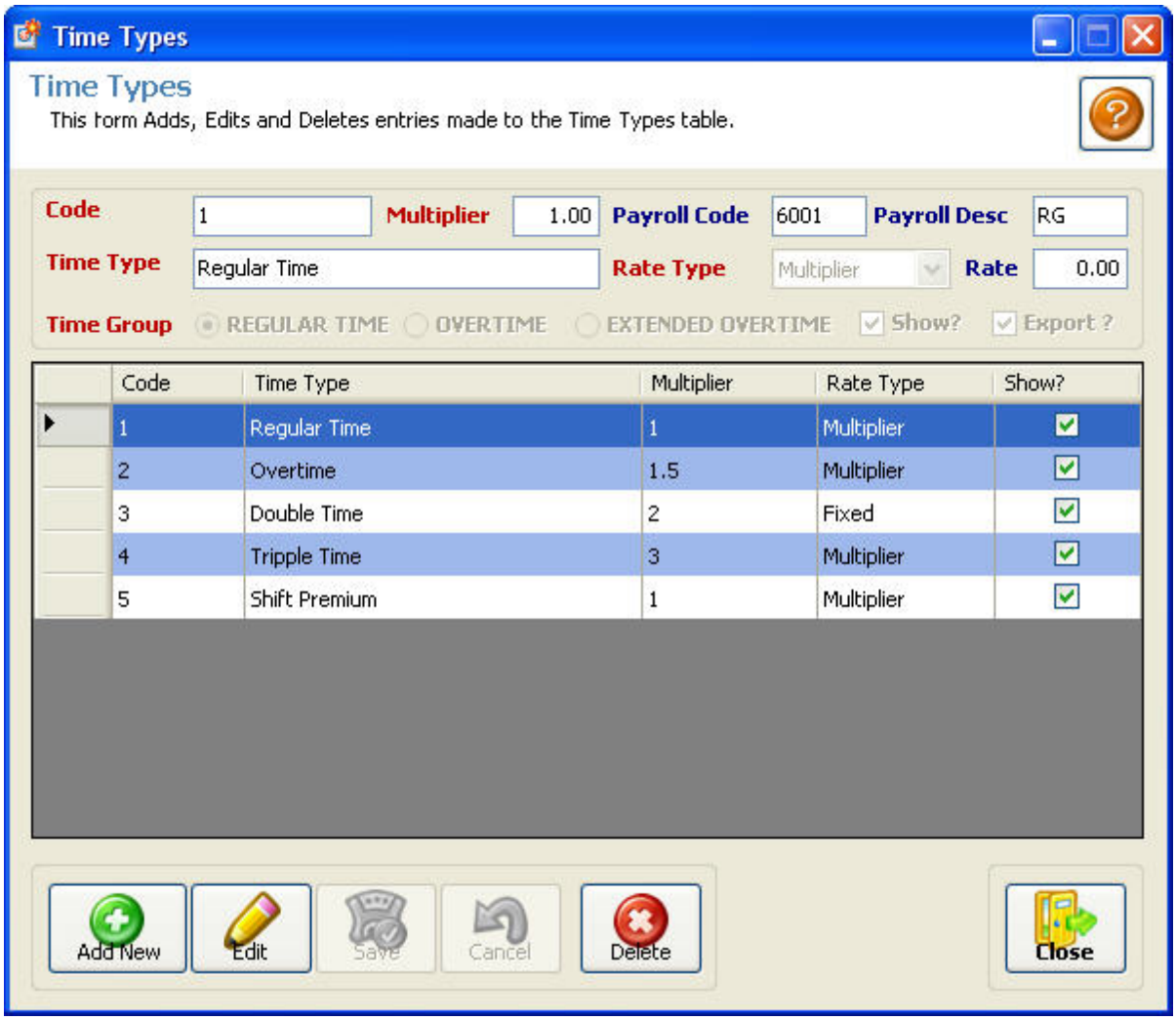
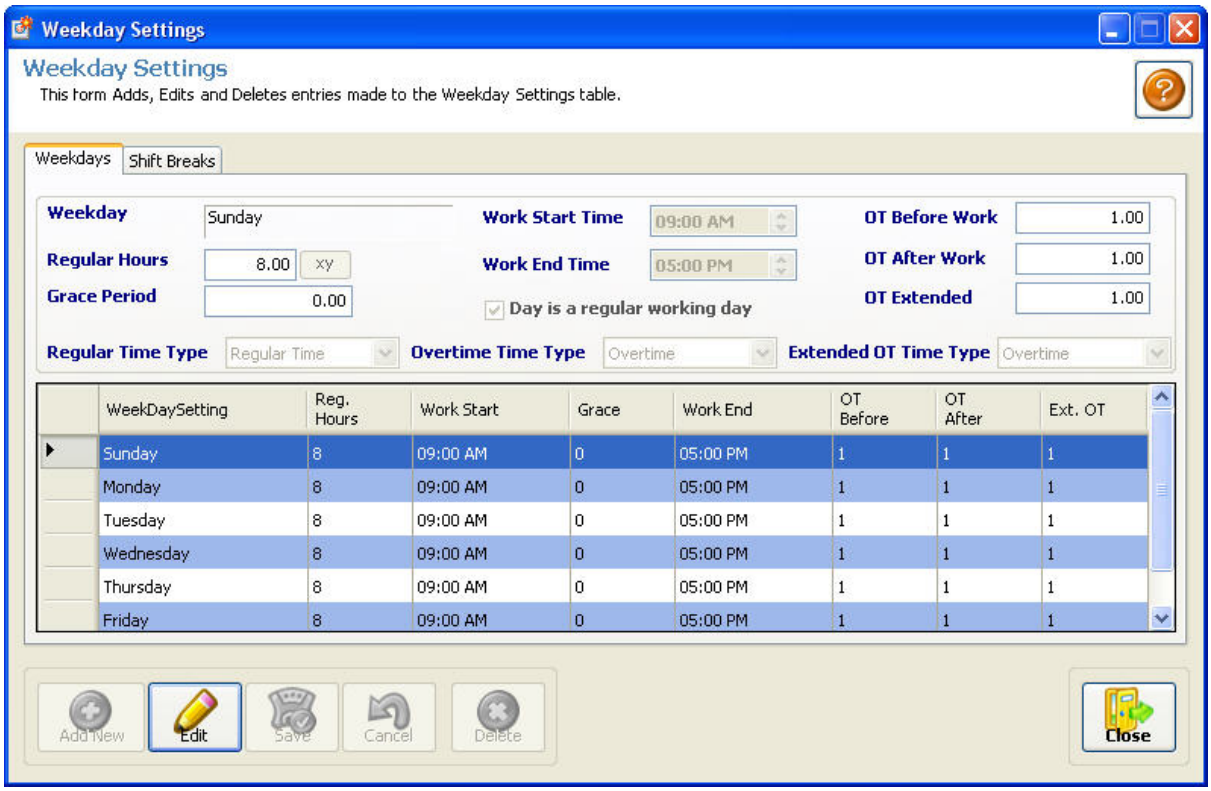

Time Types
Time Types
This form Adds, Edits and Deletes entries made to the Time Types table.
Code
1
Multiplier
1.00
Payroll Code
6001
Payroll Desc
RG
Time Type
Regular Time
Rate Type
Multiplier
Rate
0.00
Time Group
REGULAR TIME
OVERTIME
EXTENDED OVERTIME
Show?
Export ?
Code
Time Type
Multiplier
Rate Type
Show?
1
Regular Time
1
Multiplier
2
Overtime
1.5
Multiplier
3
Double Time
2
Fixed
4
Tripple Time
3
Multiplier
5
Shift Premium
1
Multiplier
Add New
Edit
Save
Cancel
Delete
Close

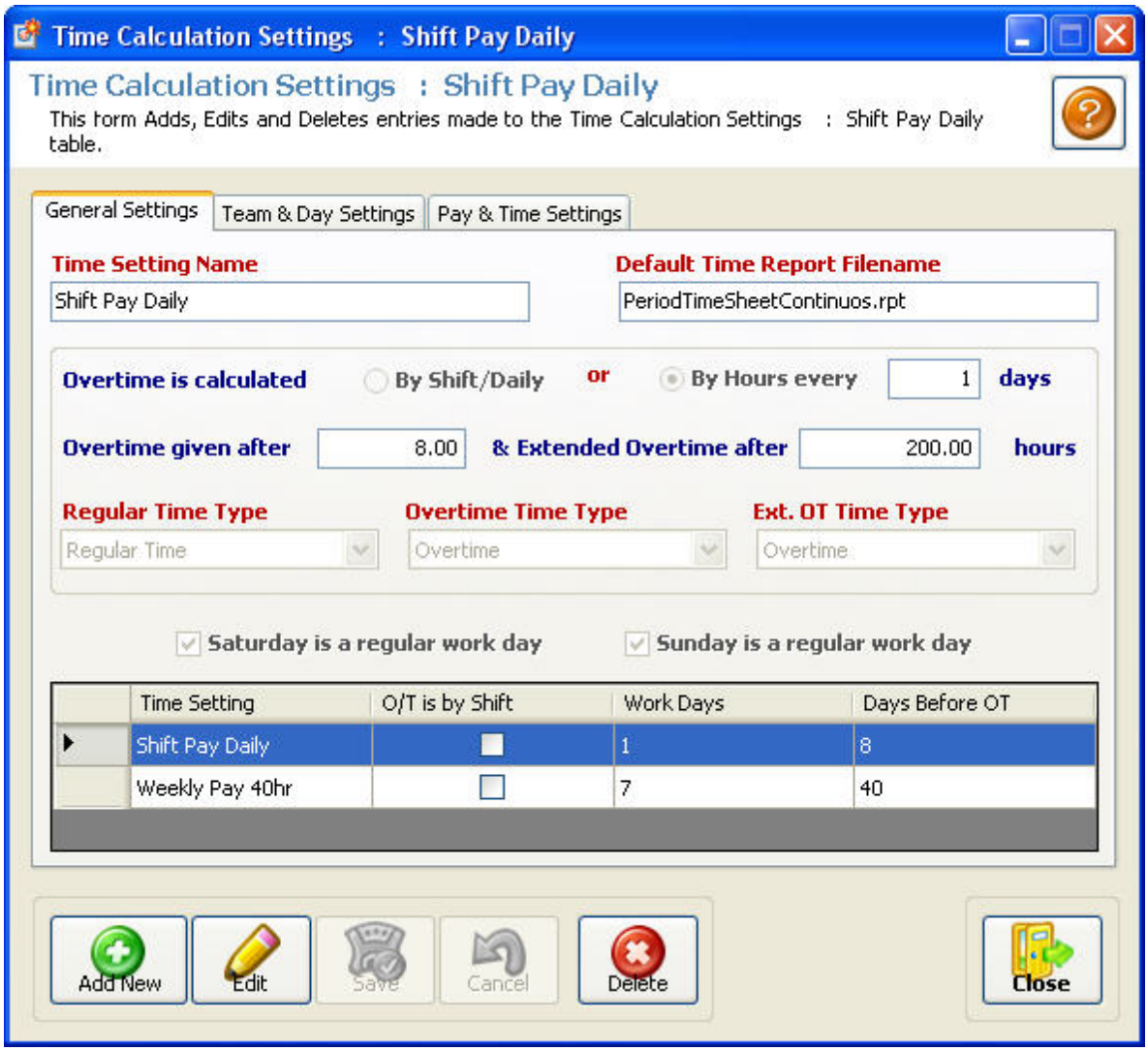
4.3.10.3 Weekday Settings

This menu allows the user



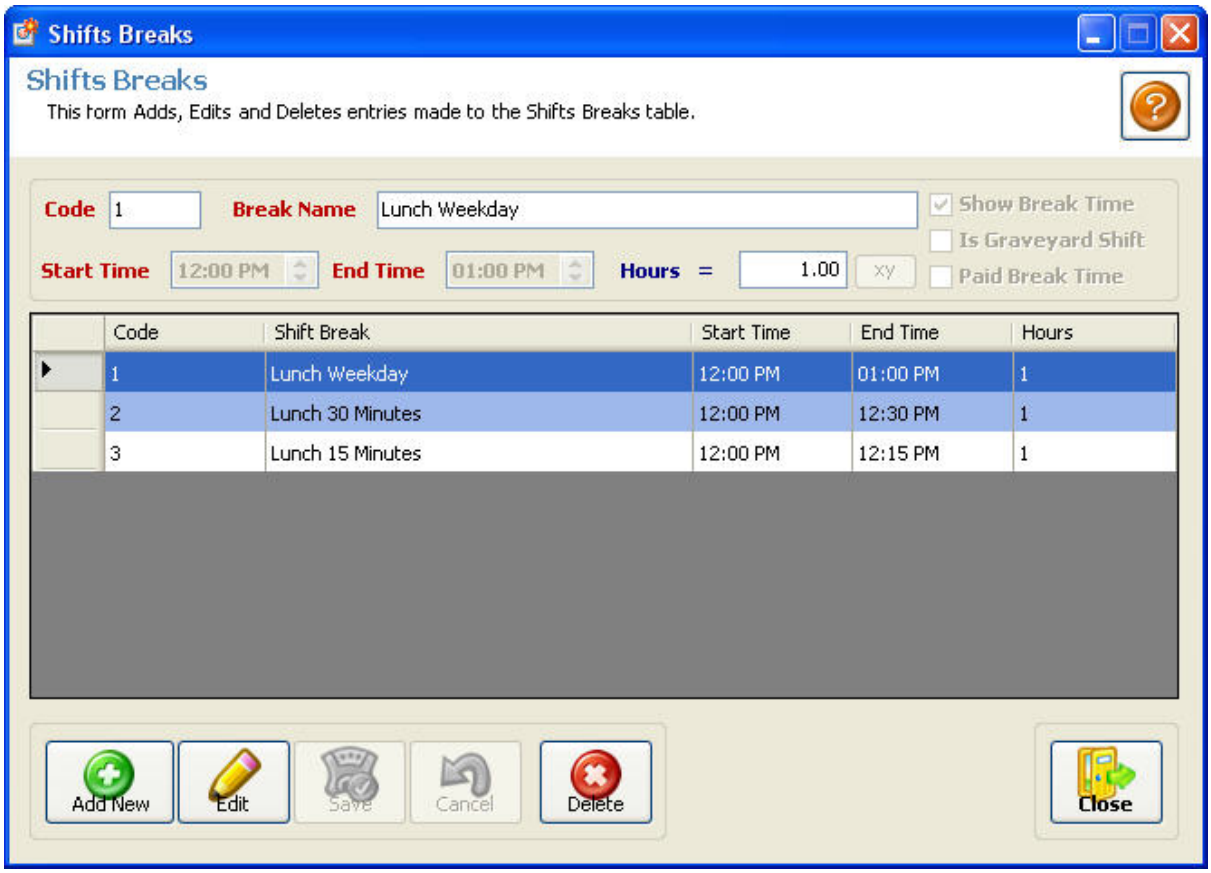
4.3.10.4 Time Calculation Settings

This menu allows the user

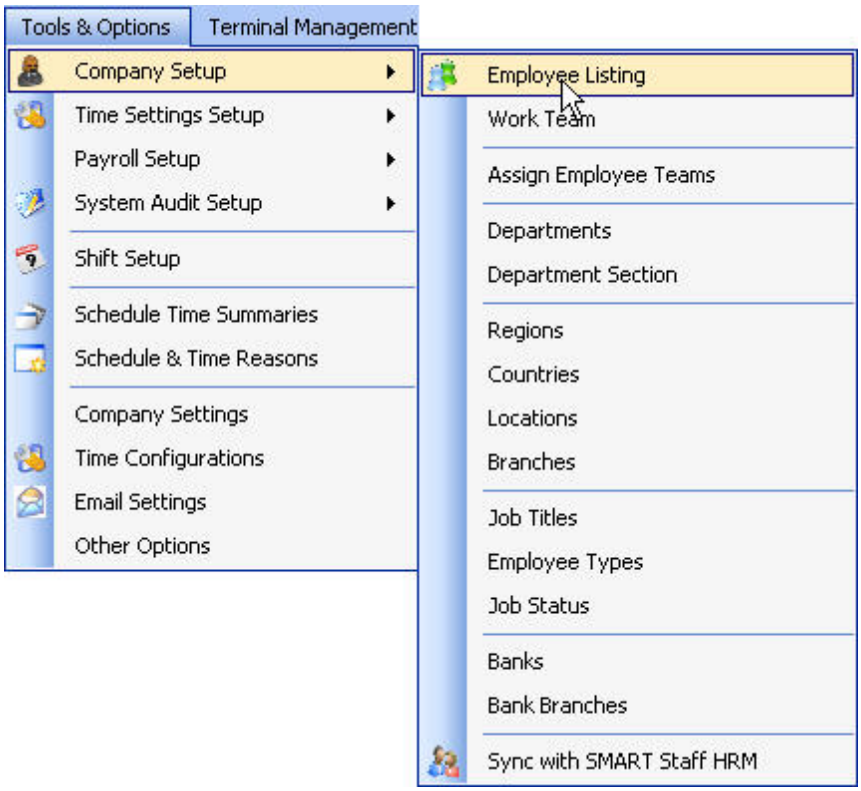


4.3.10.5 Shift Breaks

This menu allows the user to enter major break periods and time for staff.


Shifts Breaks
Shifts Breaks
This form Adds, Edits and Deletes entries made to the Shifts Breaks table.
Code 1
Break Name Lunch Weekday
Show Break Time
Is Graveyard Shift
Paid Break Time
Start Time 12:00 PM
End Time 01:00 PM
Hours = 1.00
Code Shift Break Start Time End Time Hours
1 Lunch Weekday 12:00 PM 01:00 PM 1
2 Lunch 30 Minutes 12:00 PM 12:30 PM 1
3 Lunch 15 Minutes 12:00 PM 12:15 PM 1
Add New
Edit
Save
Cancel
Delete
Close

4.4 Tools & Options Menu



4.4.1 Company Setup

Setting up the Company's information by using the "Tools and Options" menu.

Go to menu TOOLS & OPTIONS >> COMPANY SETUP and set up each item in this menu one by one. The most important ones are DEPARTMENTS, JOB TITLES and EMPLOYEE TYPE (or PAYROLL CATEGORY)

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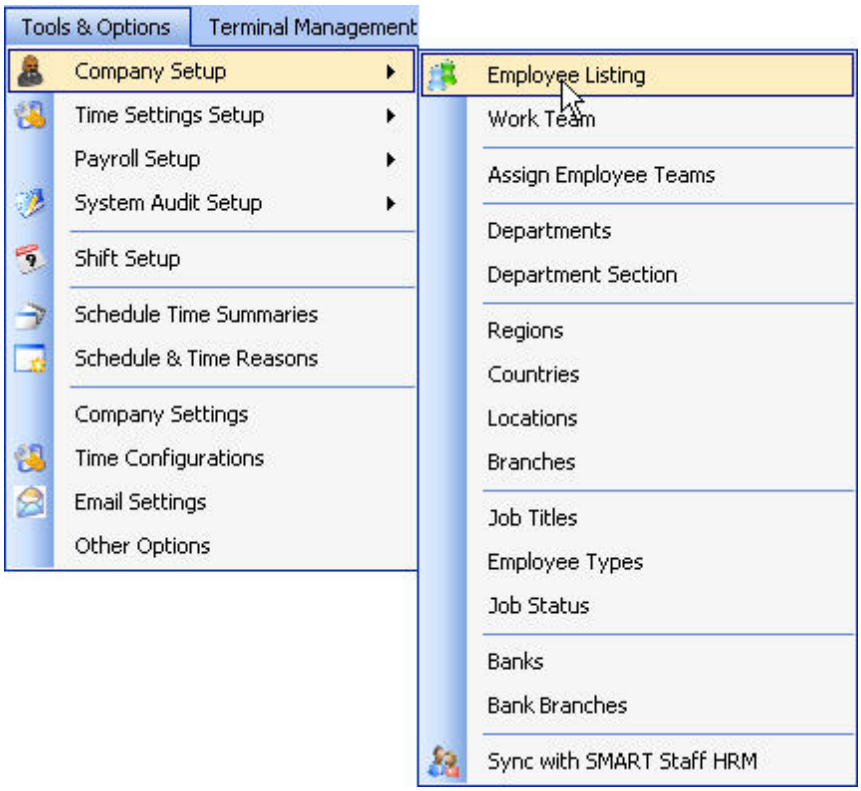

RELATED TOPICS:

- Setup Employee Listing
- Setup Work Teams
- Assign Employee Teams
- Setup Departments
- Setup Department Sections
- Setup Regions
- Setup Countries
- Setup Locations
- Setup Branches
- Setup Job Titles
- Setup Employee Types
- Setup Job Status
- Setup Bank
- Setup Bank Branches

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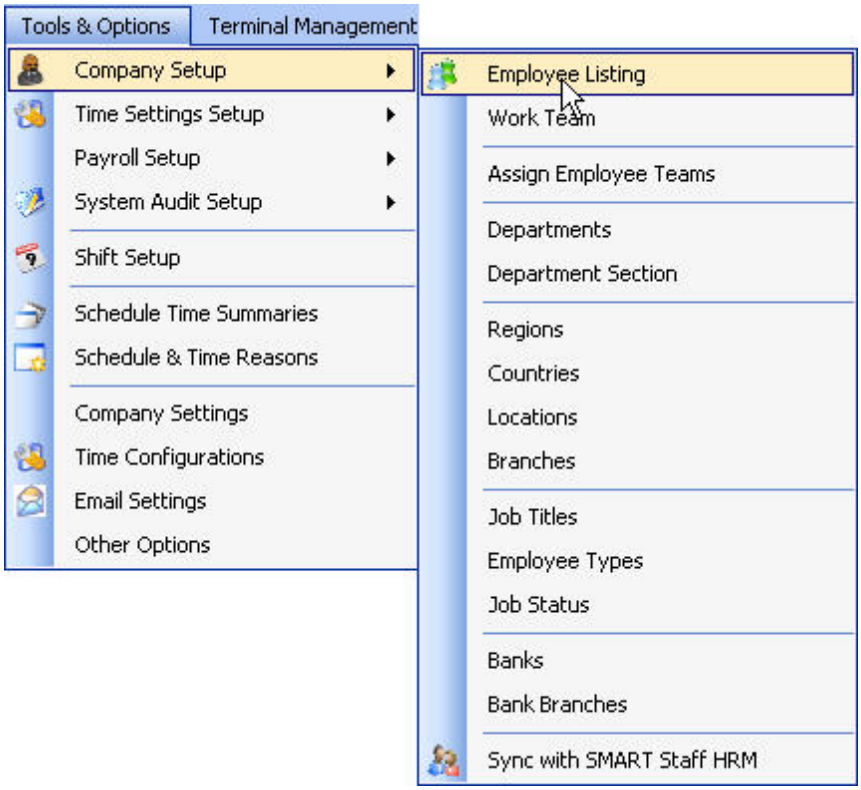
4.4.1.1 Employee Listing

This feature deliveries the ability to browse, add, edit and delete employees inside of the system. Go to TOOLS & OPTIONS >> COMPANY SETUP >> EMPLOYEE LISTING menu.

Note: Setup supporting information such as Departments and Job titles first.



The Screen will now look like this:

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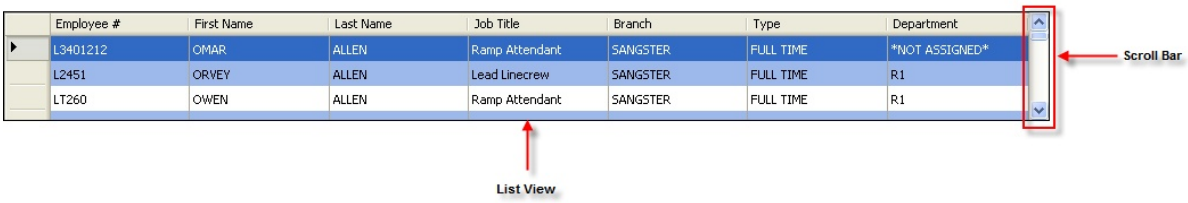
1. To add a new employee, left mouse click the "Add" button on the form and proceed to fill out the fields.
2. Click the "Save" or "Save & New" when you are done adding all the information you desire to input.

Edit

1. A dialog window like the one shown in Figure below, will appear.
2. Use the List View that is seen on "Employee Profile" tab scroll bar to navigate and select the employee that you would like to edit.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

RELATED OR MISSING FIELD INFORMATION

To add a missing Job Title, CLICK HERE! and REFRESH

To add a missing Department, CLICK HERE! and REFRESH

To add a missing Pay Rate, CLICK HERE! and REFRESH

To add a missing Employee Type, CLICK HERE! and REFRESH

To add a missing Branch, CLICK HERE! and REFRESH

To add a missing Default Shift, CLICK HERE! and REFRESH

4.4.1.2 Work Team

Work Teams are used to categorized employees in groups. Examples are:

- Production Supervisors (All supervisors. This team will be managed by the Production Manager)
- Production Workers - Crew A (Sub team in production. This team will be managed by one particular Production Supervisor)
- Production Workers - Crew B (Sub team in production. This team will be managed by one particular Production Supervisor)

Where managing staff profiles are not specific to a manager or supervisor. A general team can be created to accommodate all employees such as "All Staff".

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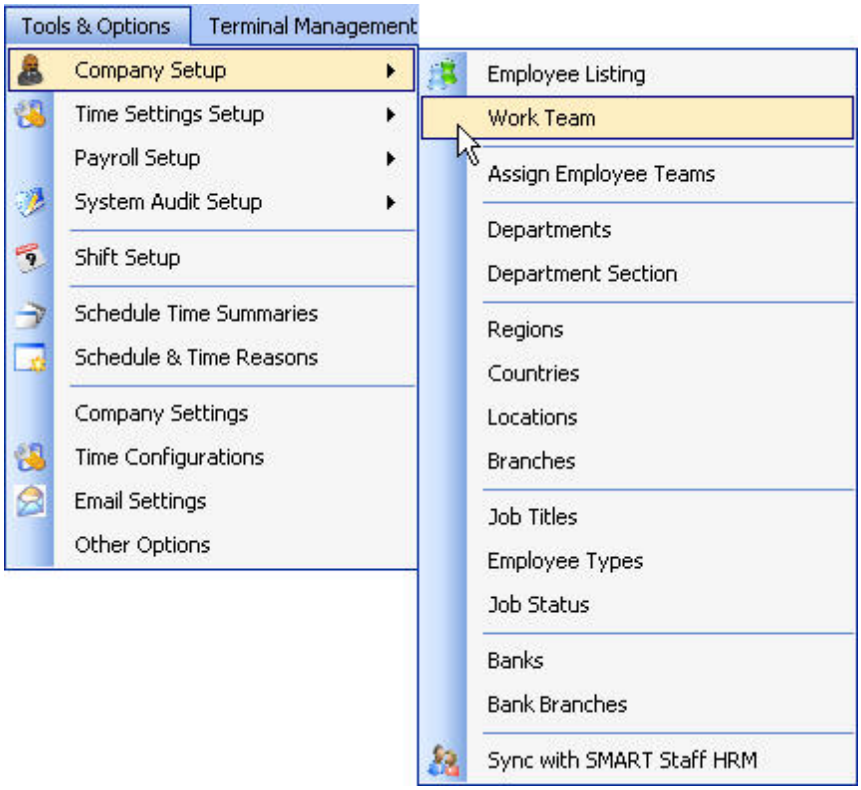

Work Team dialog window.

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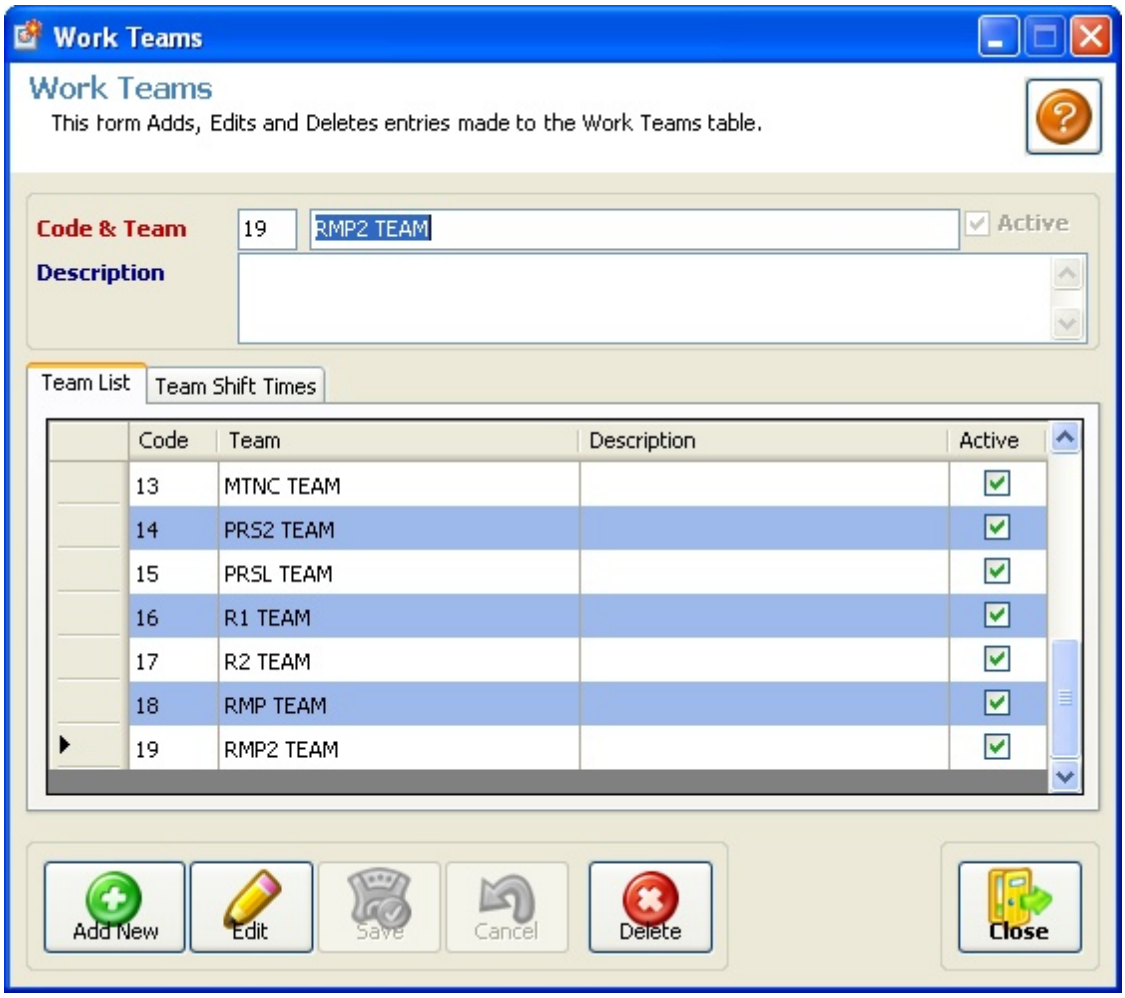

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.3 Departments

To setup, view, modify or delete "Department" for your organization use the "Departments" dialog window that allows you to do these adjustments. Navigate to "Main Menu" => "Tools & Options" => "Company Setup" => "Departments".

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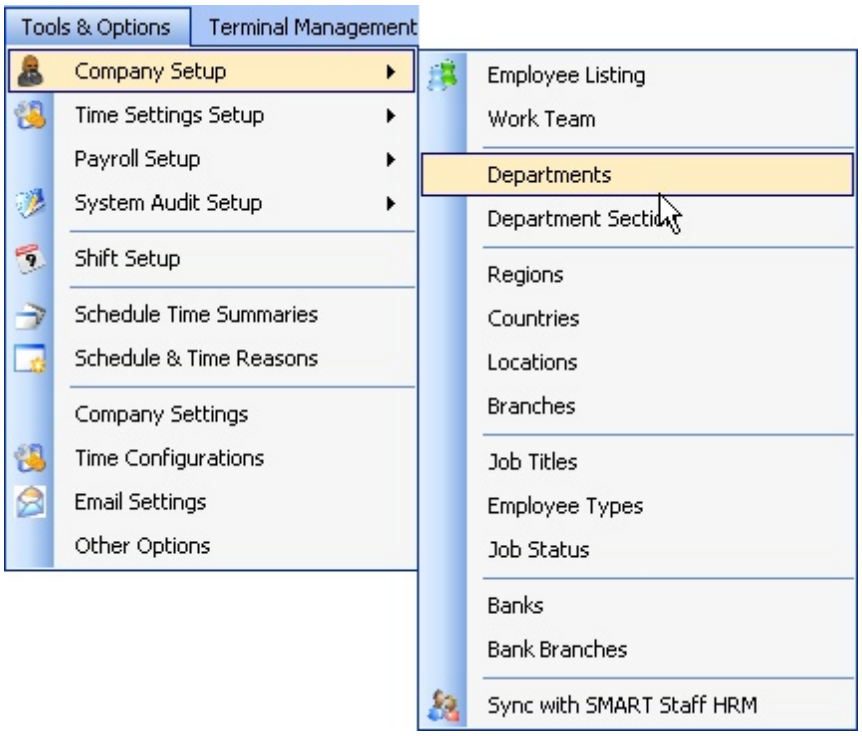
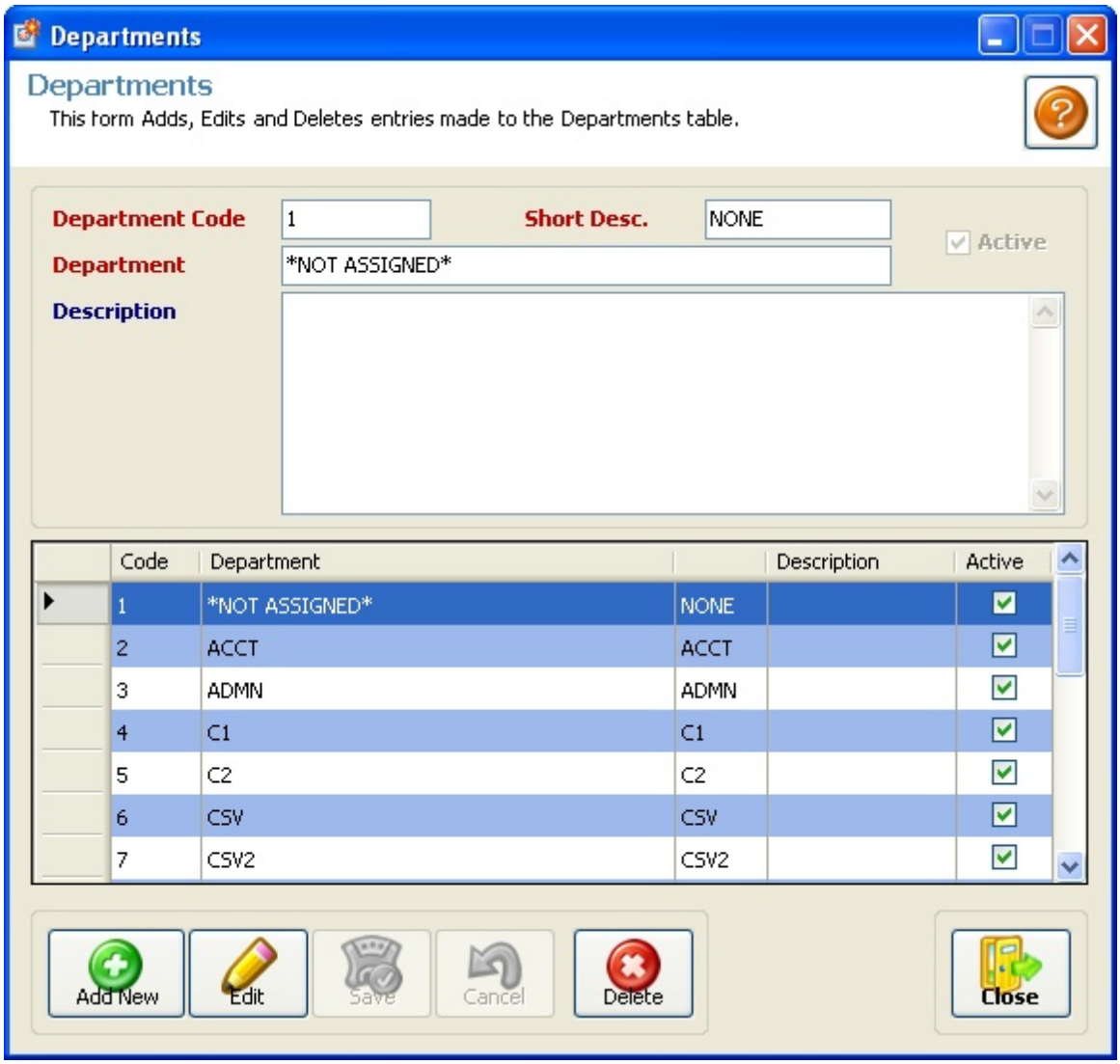


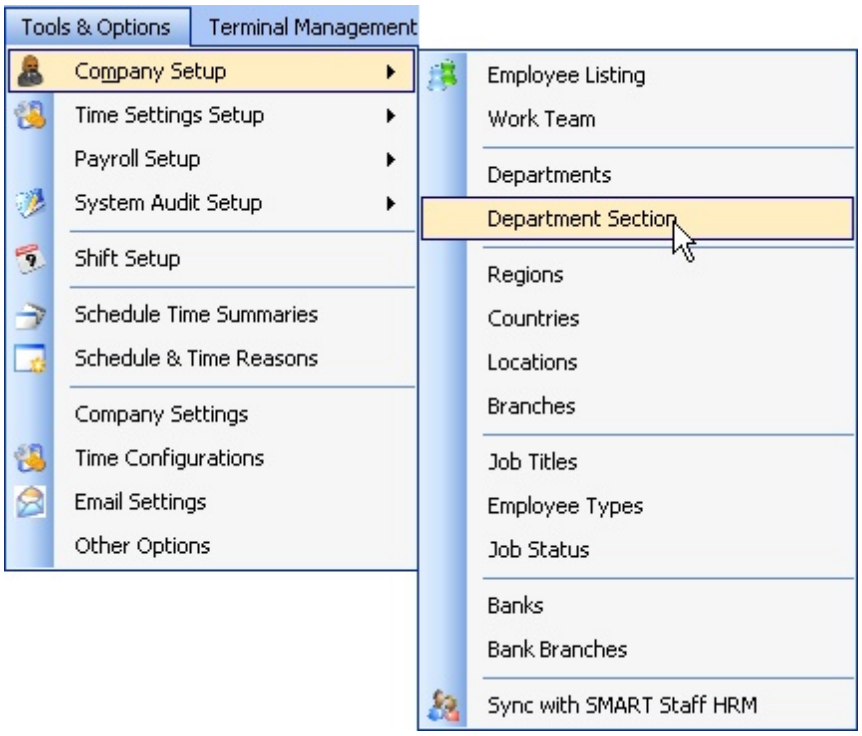
The following dialog window will appear.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.4 Department Sections

Departments can be further divided into Departments Sections. "Sections" can be constructed, view, modify or deleted via the "Department Section" dialog window. To get to this window, navigate to "Main Menu" => "Tools & Options" => "Company Setup" => "Departments Sections".



The following dialog window will appear:

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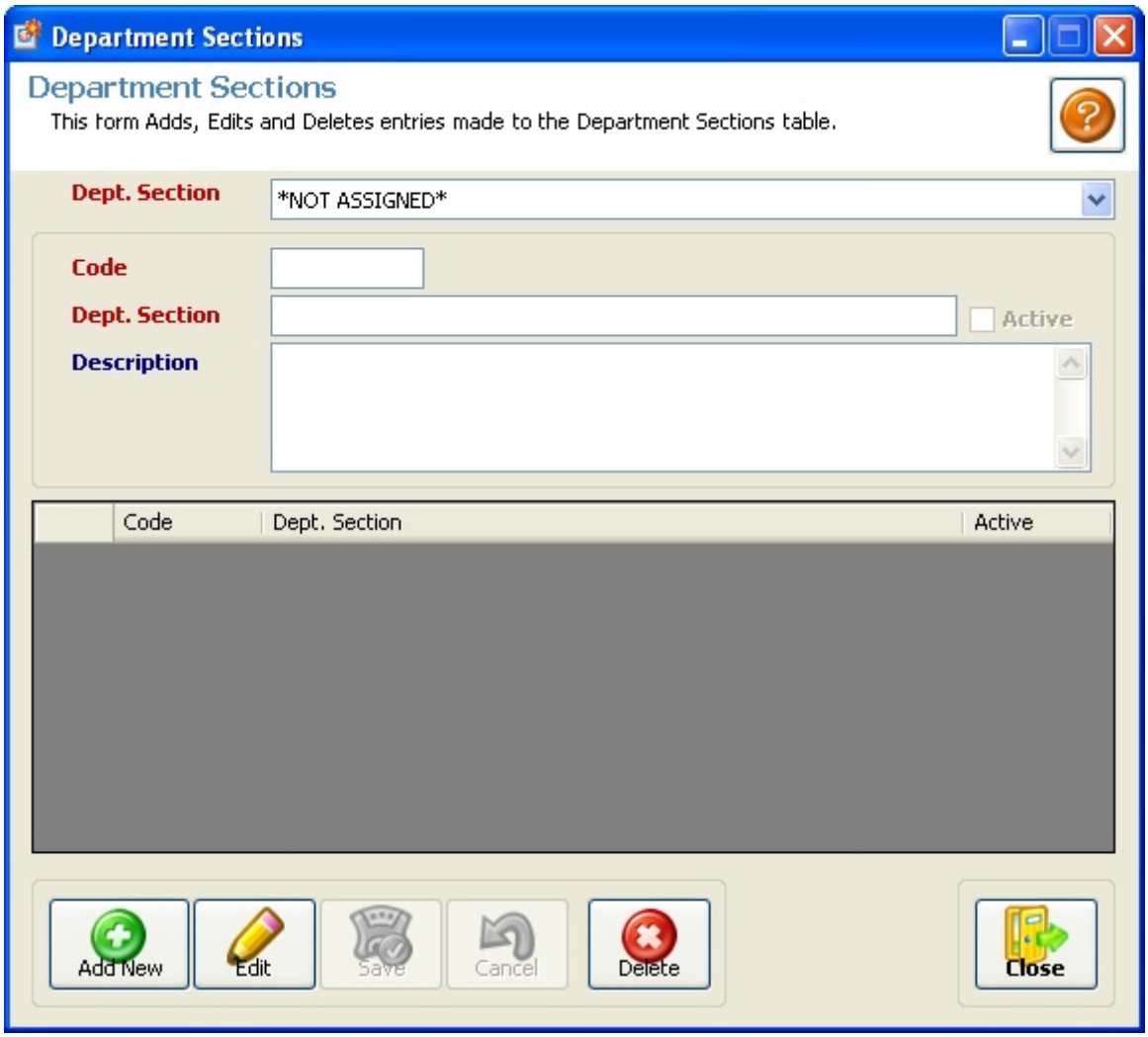

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.5 Job Titles

To setup, view, modify or delete "Job Titles" for your organization use the "Job Titles" dialog window that allows you to do these adjustments. Navigate to "Main Menu" => "Tools & Options" => "Company Setup" => "Job Titles".

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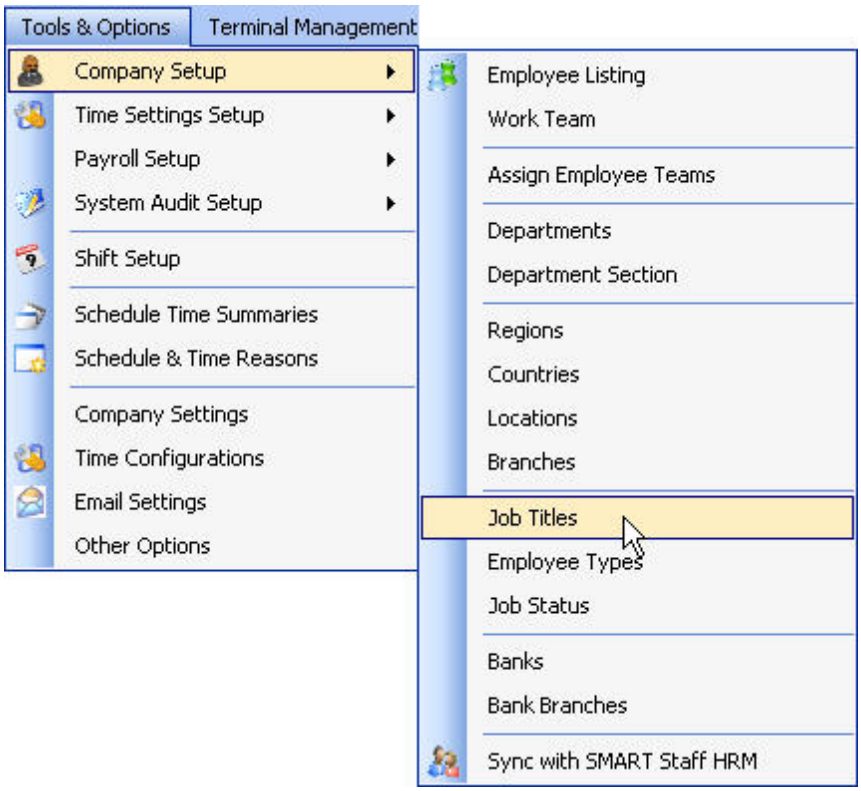

The following dialog window will appear:

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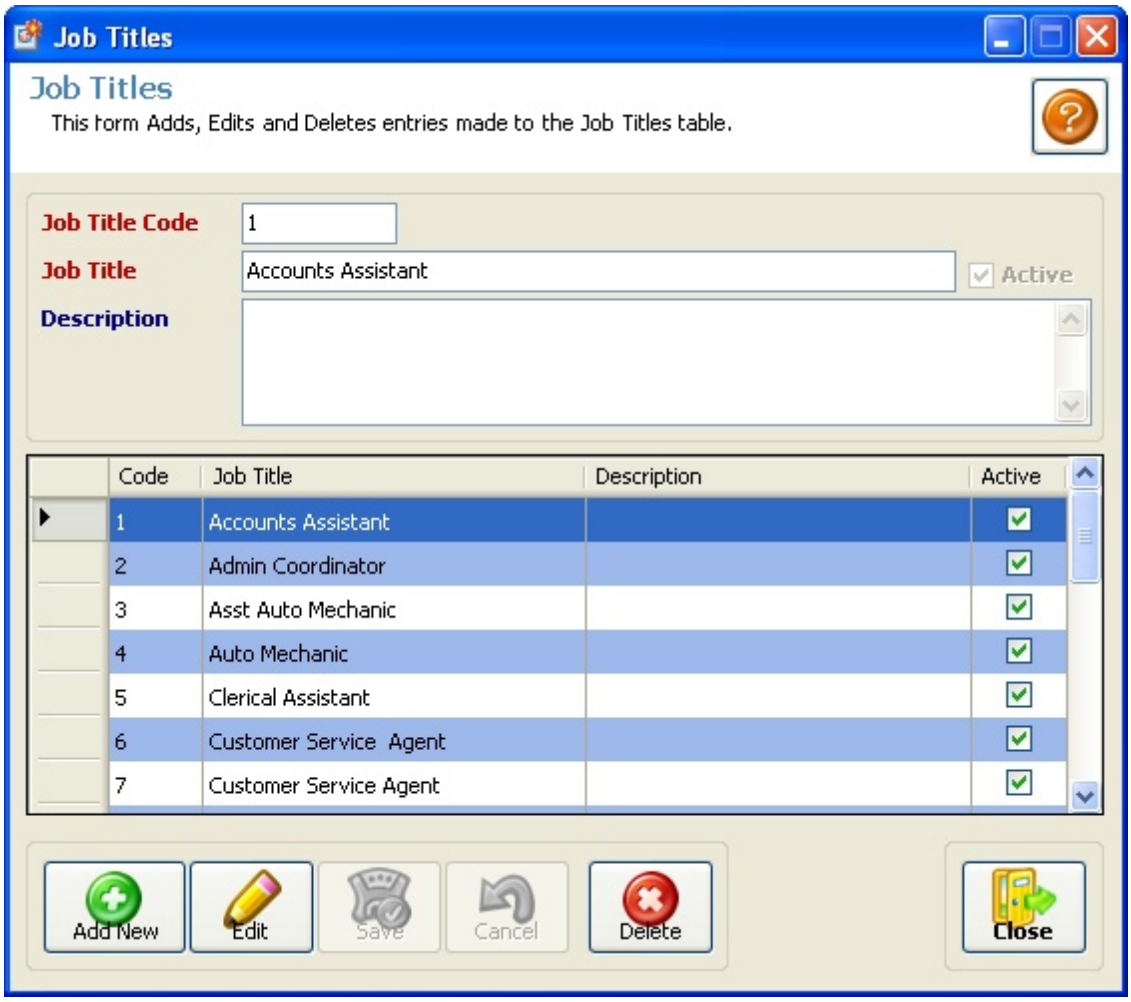

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.6 Employee Types

To setup, view, modify or delete "Employee Types" for your organization use the "Employee Types" dialog window that allows you to do these adjustments. Navigate to "Main Menu" => "Tools & Options" => "Company Setup" => "Employee Types".

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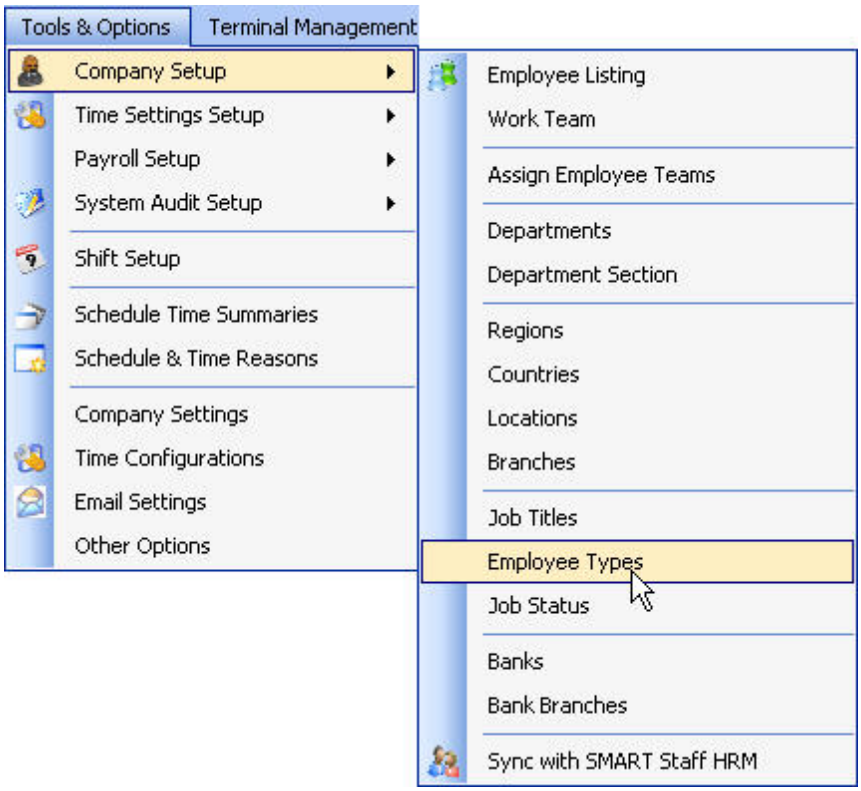
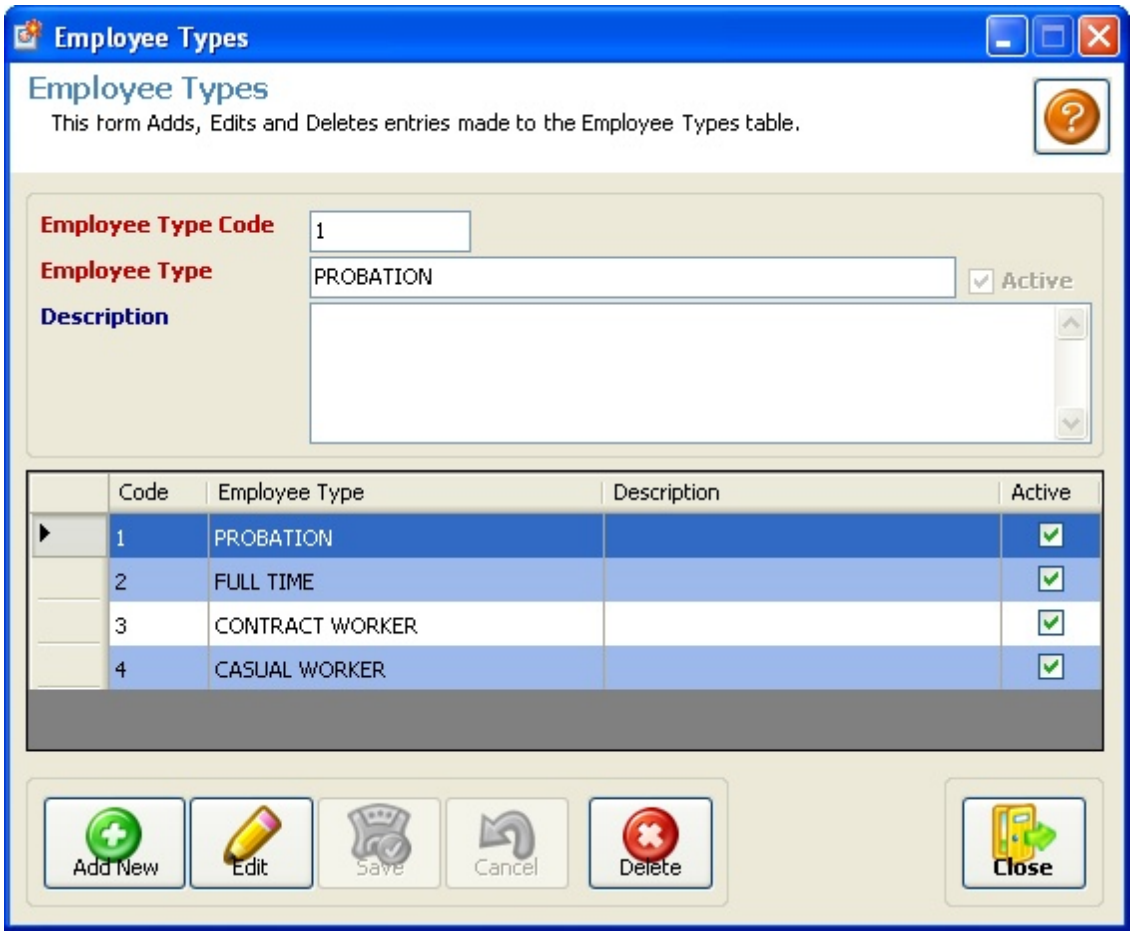


The following dialog window will appear:



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.7 Job Status

To setup, view, modify or delete different job status for your organization. To get to the "Job Status" dialog window that will allows you to do these manipulations. You first navigate to "Main Menu" => "Tools & Options" => "Company Setup" => "Job Status".

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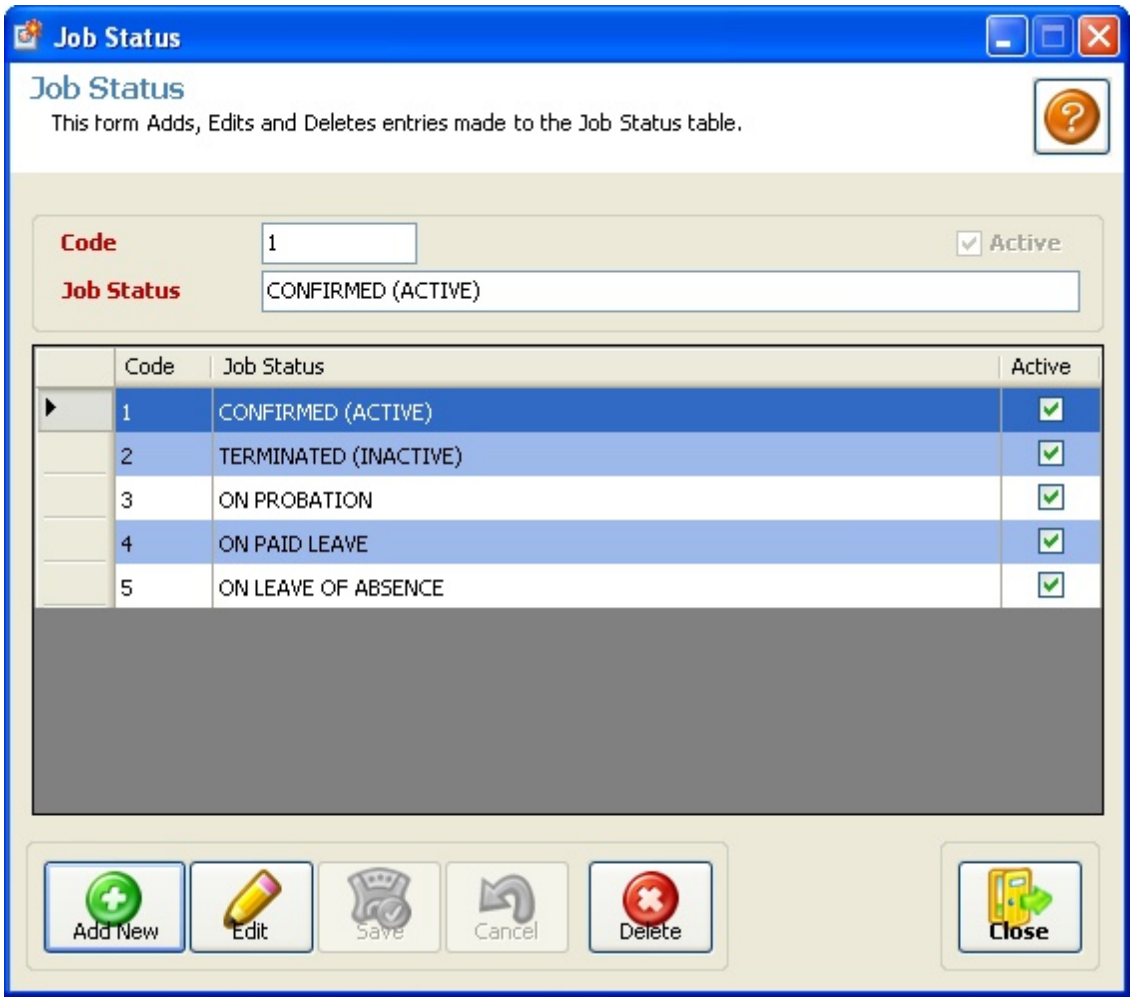

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.8 Banks

To setup, view, modify or delete "Banks" for your organization use the "Banks" dialog window that allows you to do these adjustments. Navigate to "Main Menu" => "Tools & Options" => "Company Setup" => "Banks".

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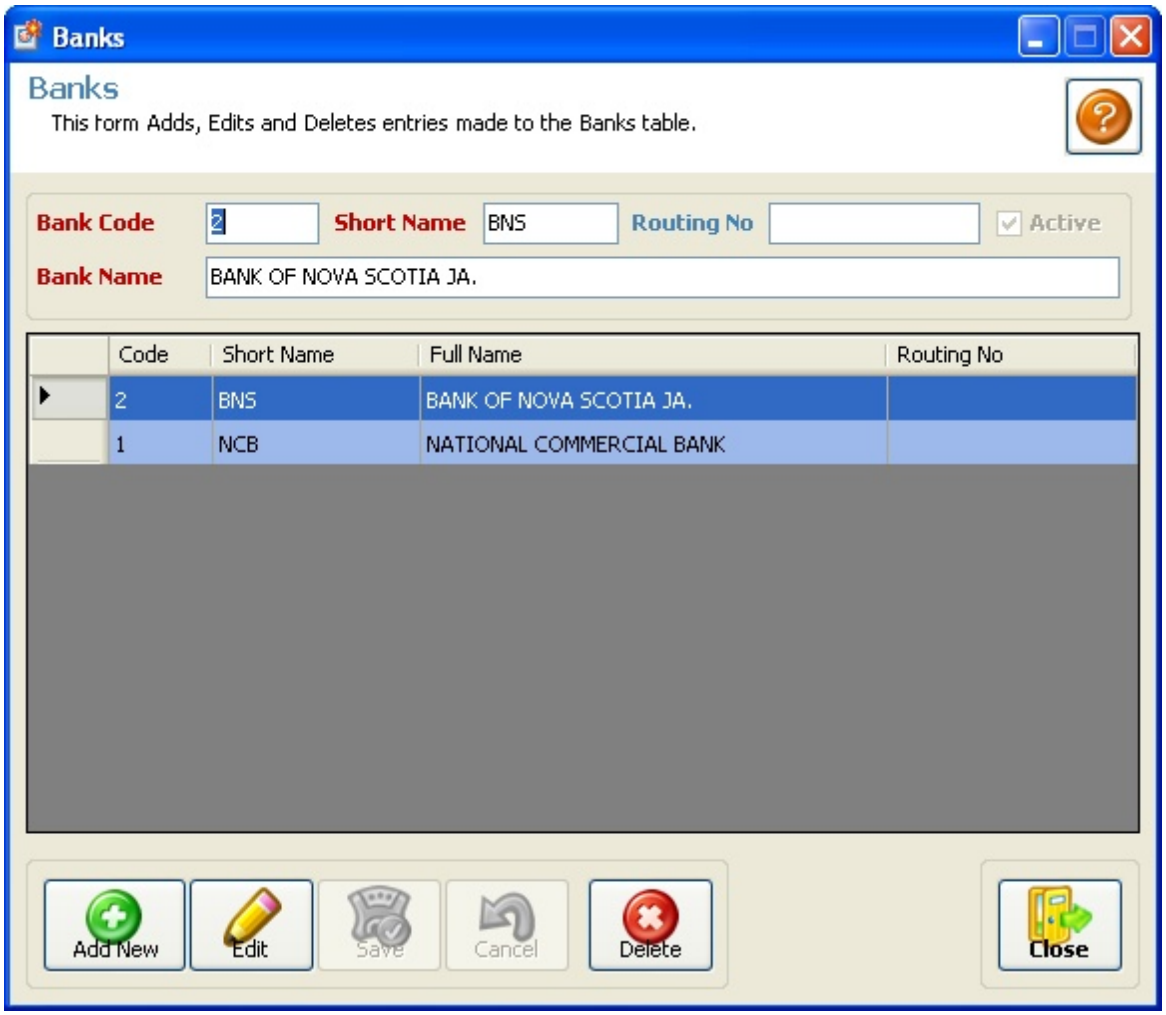

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.9 Bank Branches

To setup, view, modify or delete "Bank Branches" for your organization use the "Bank Branches" dialog window that allows you to do these adjustments. Navigate to "Main Menu" => "Tools & Options" => "Company Setup" => "Bank Branches".

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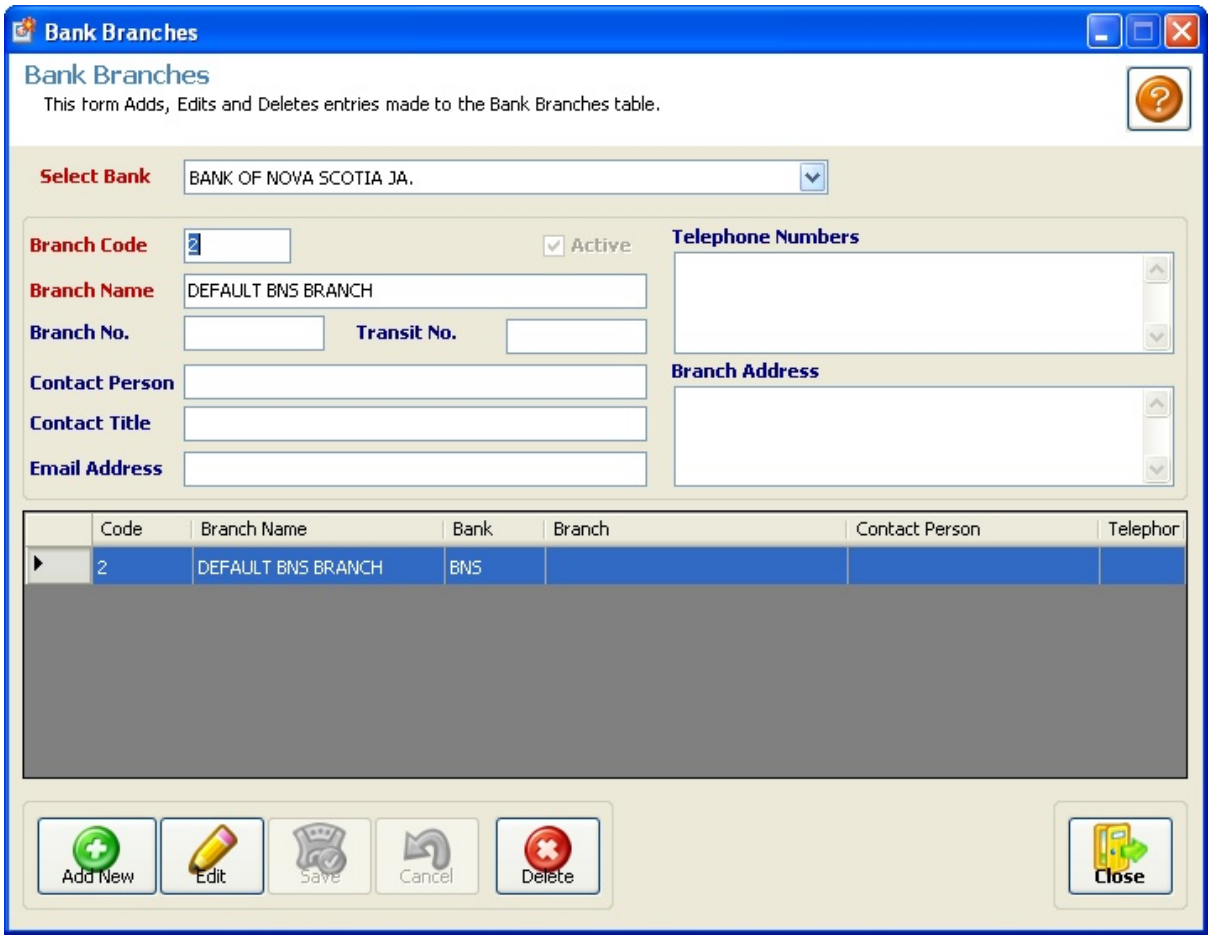

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.1.10 Sync with SMART Staff HRM

When ScheduleMaster is integrated with SMART Staff HRM application, employee information can be synchronize to avoid errors and duplicate data entry.

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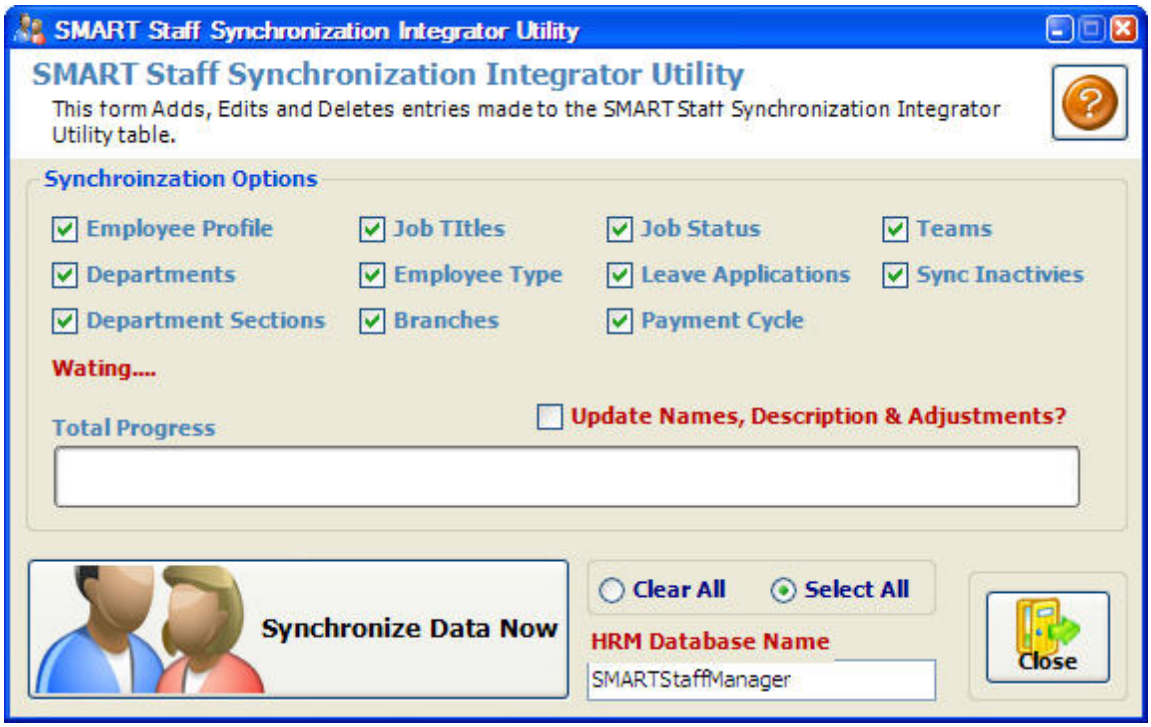

To synchronize:

- Select all the data sections you want to synchronize
- Press the Synchronize Data Now button and wait until completed

4.4.2 Time Setting Setup

Enter topic text here.

4.4.2.1 Holidays

The SMART Schedule Master system allows you to set holidays observed by your organisation along with additional features that allow you to indicate whether or not an employee should be paid for the observed holiday. To get to this window you must navigate to the "Main Menu" => "Tools & Options" => "Time Settings Setup" => "Holidays".

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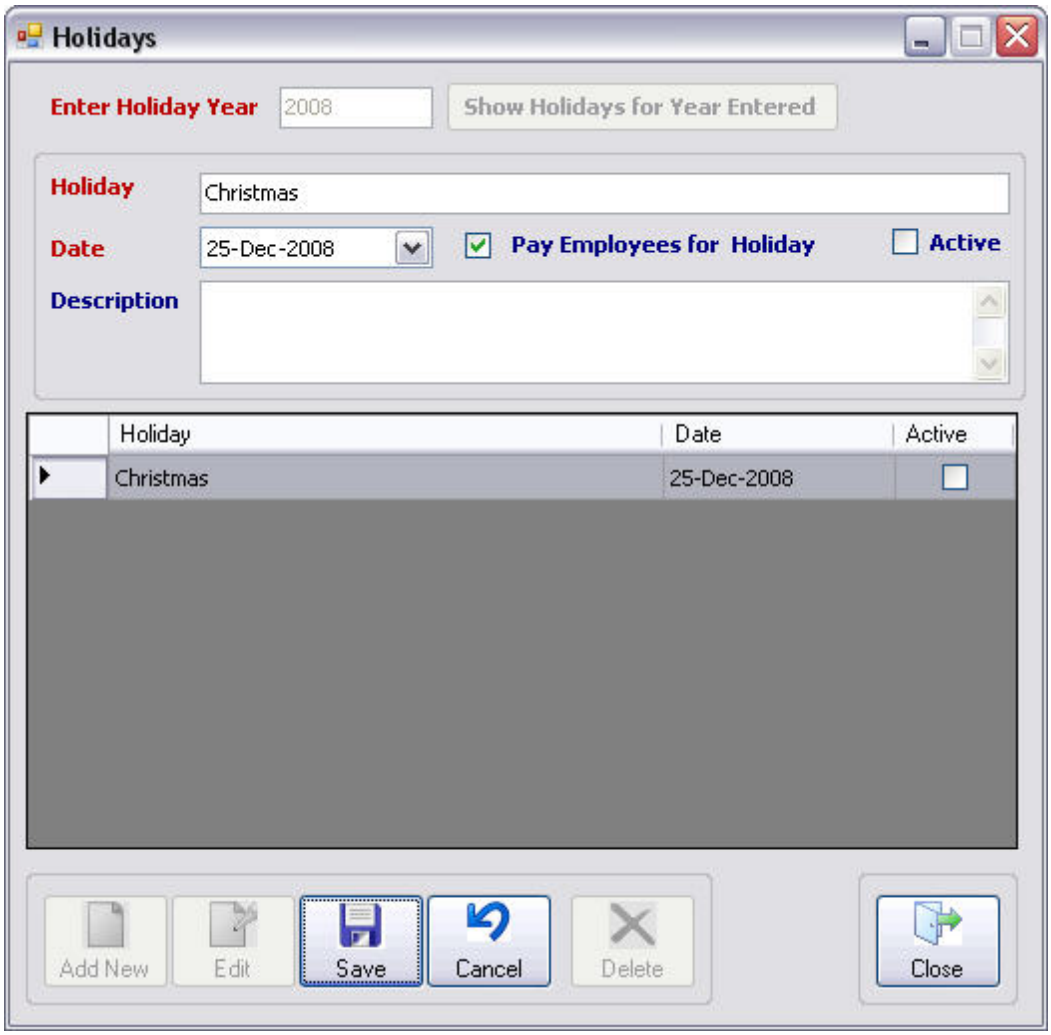

See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

4.4.2.2 Time Types

The SMART Schedule Master system allows you to set payroll time types use within your organisation along with additional features that allow you to indicate a payroll code for each type. To get to the "Time Types" dialog window you must navigate to the "Main Menu" => "Tools & Options" => "Time Settings Setup" => "Time Types".

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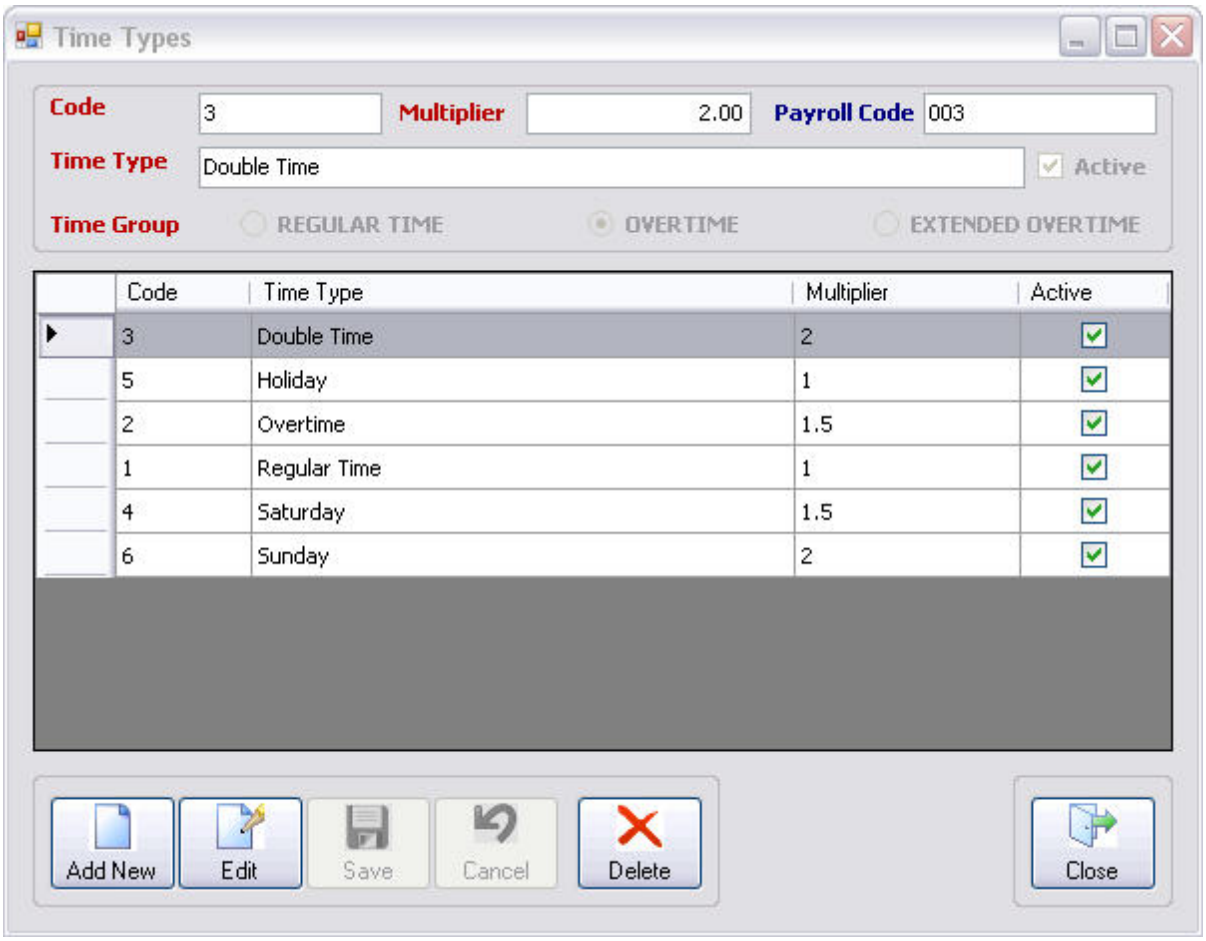

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.2.3 Shift Breaks

The SMART Schedule Master system allows you to set official shift breaks within your organisation's working hours. To get to this dialog window, to manage these settings, you navigate to the "Main Menu" => "Tools & Options" => "Time Settings Setup" => "Shift Breaks".

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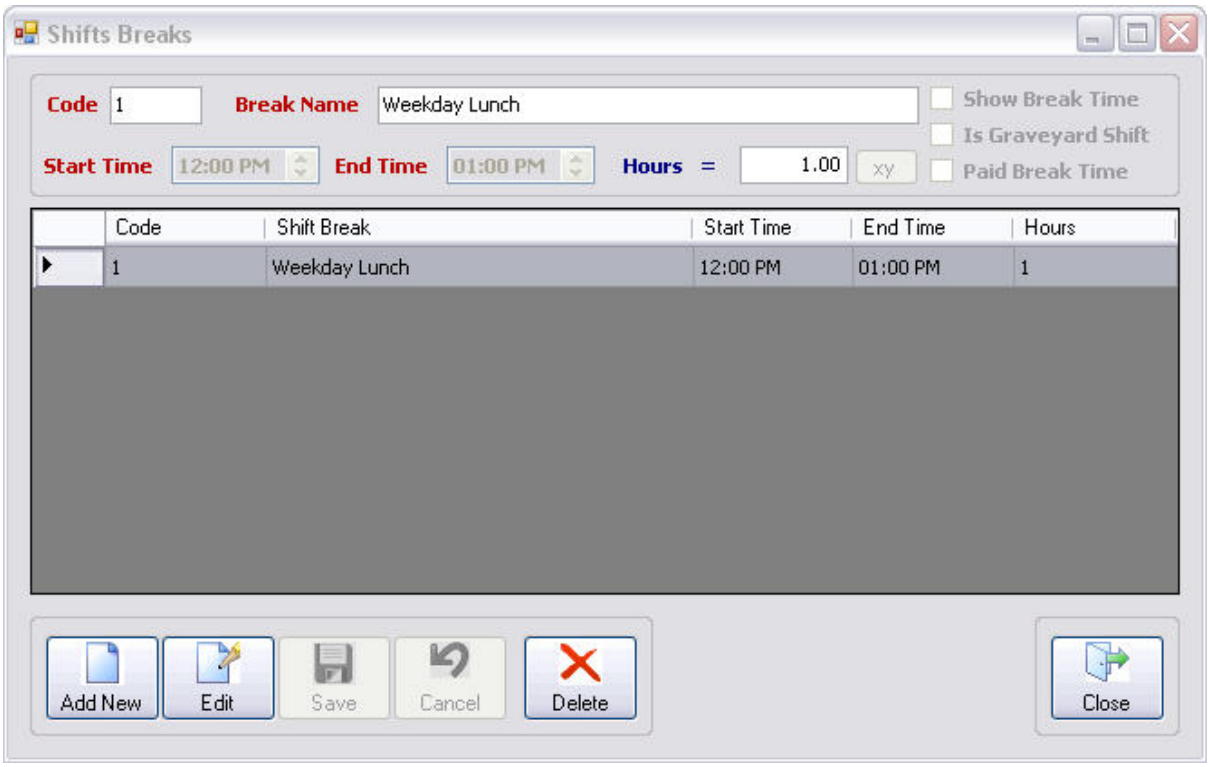

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

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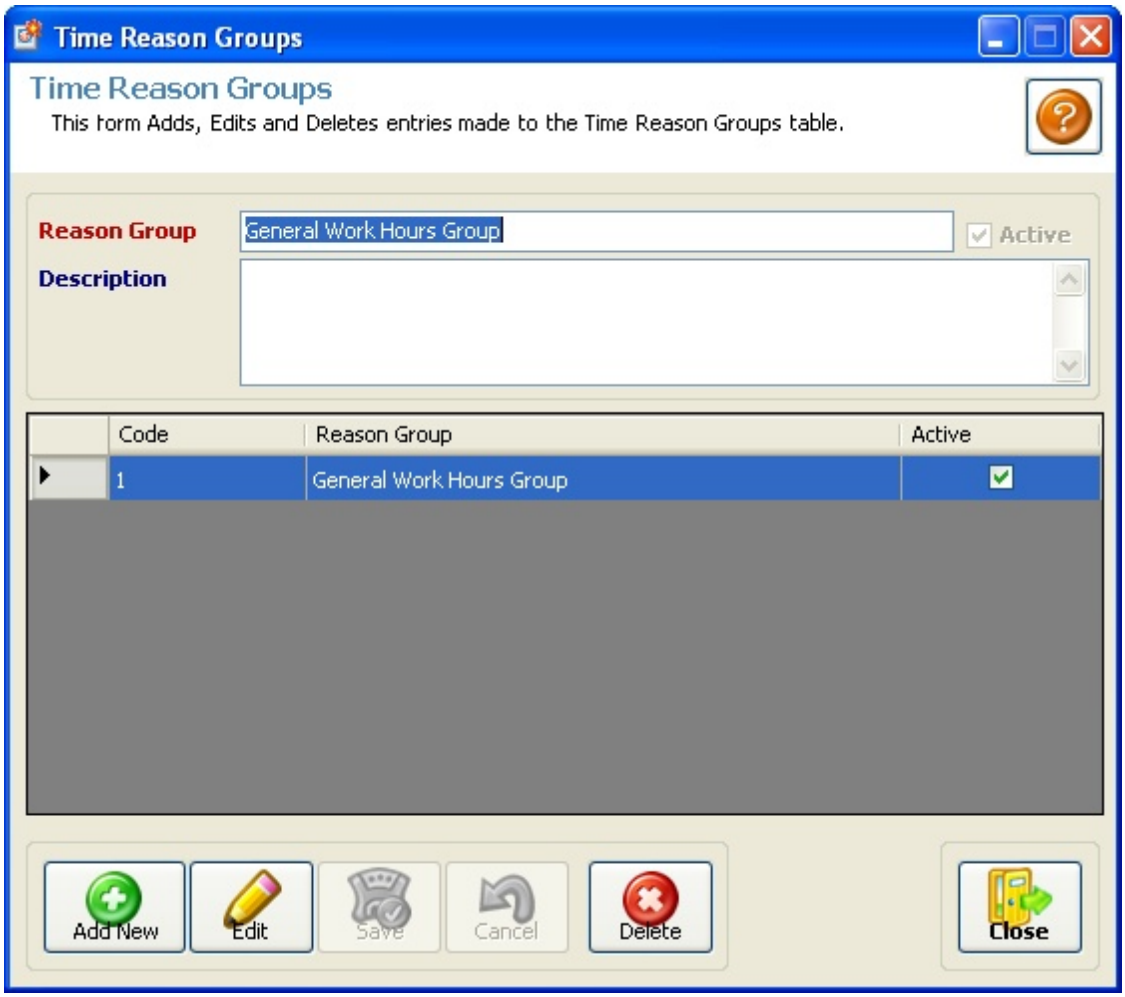
4.4.2.4 Time Reason Groups



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

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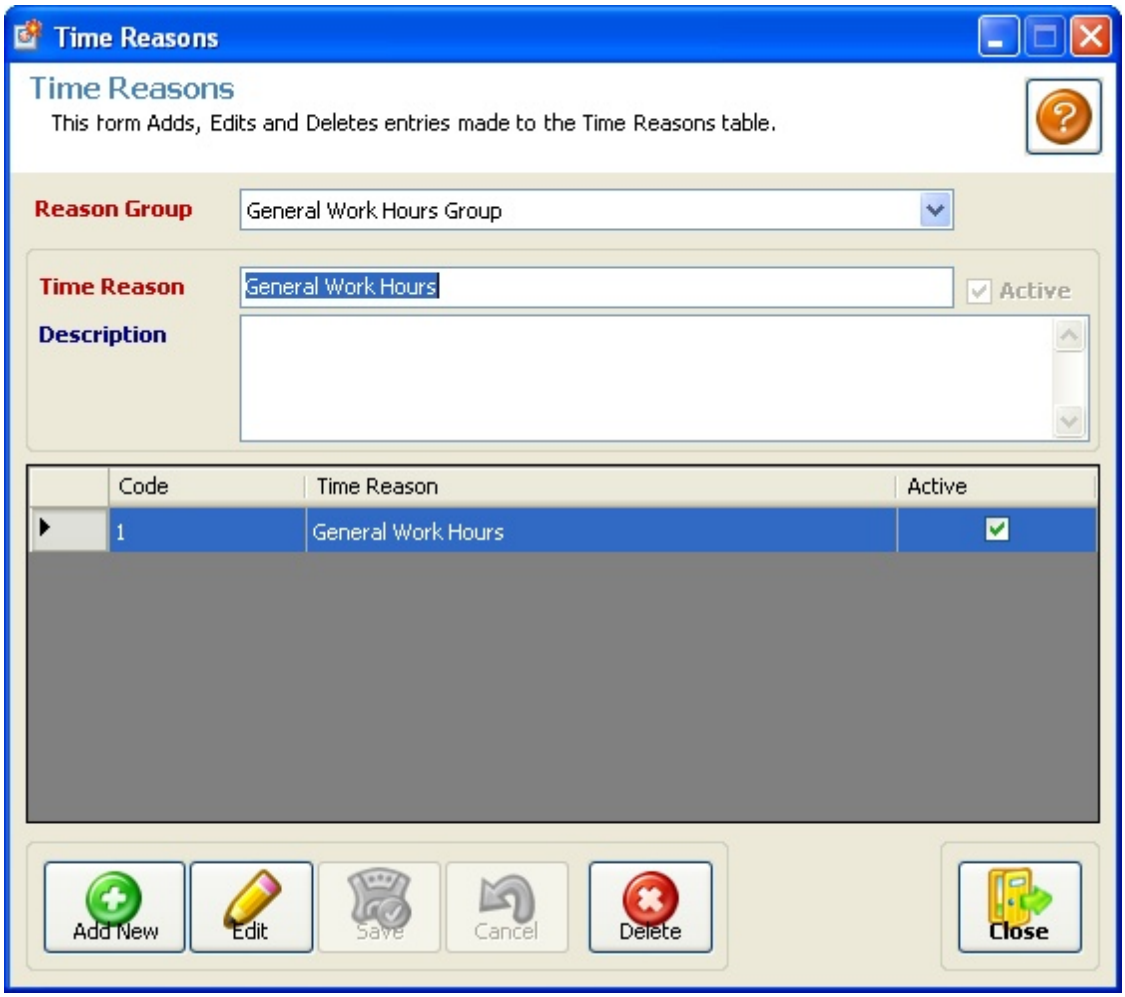
4.4.2.5 Time Reason

Enter topic text here.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.2.6 Weekday Settings

Setting the different workdays and their work times within the SMART Schedule Master system, is handled by the "Workdays Setting" dialog.
To get to this dialog window, to manage these settings, navigate to the "Main Menu" => "Tools & Options" => "Time Settings Setup" => "Weekdays Settings".

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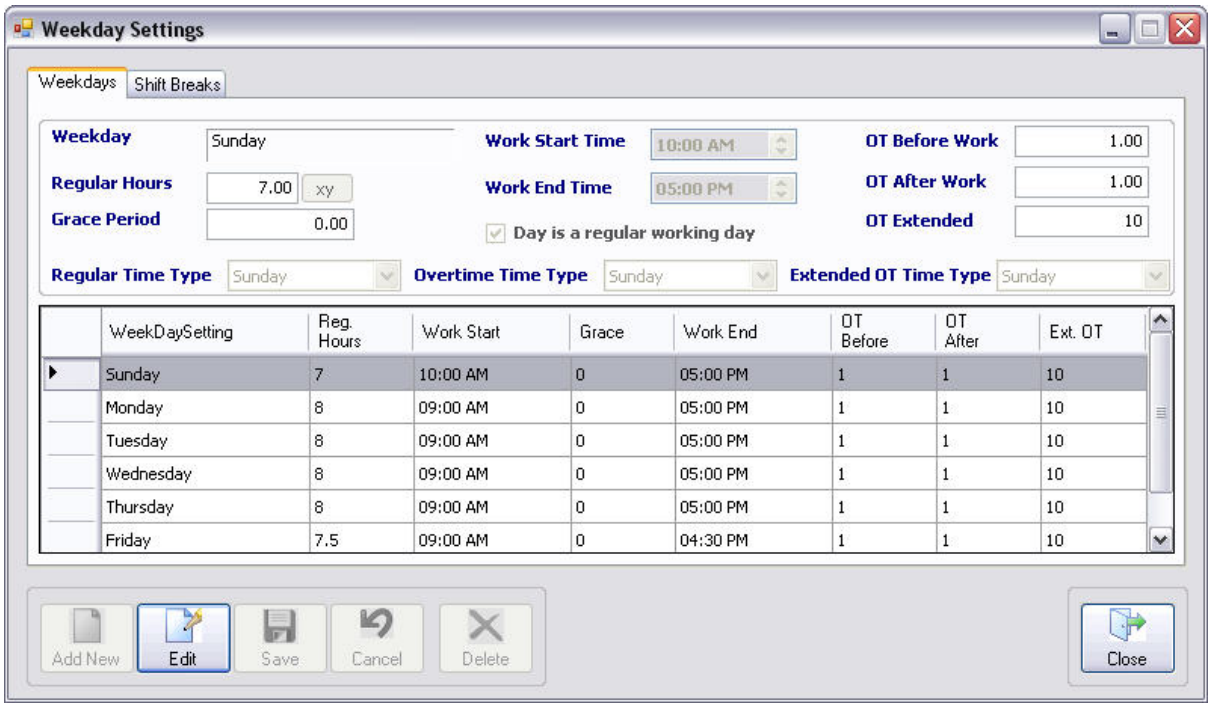
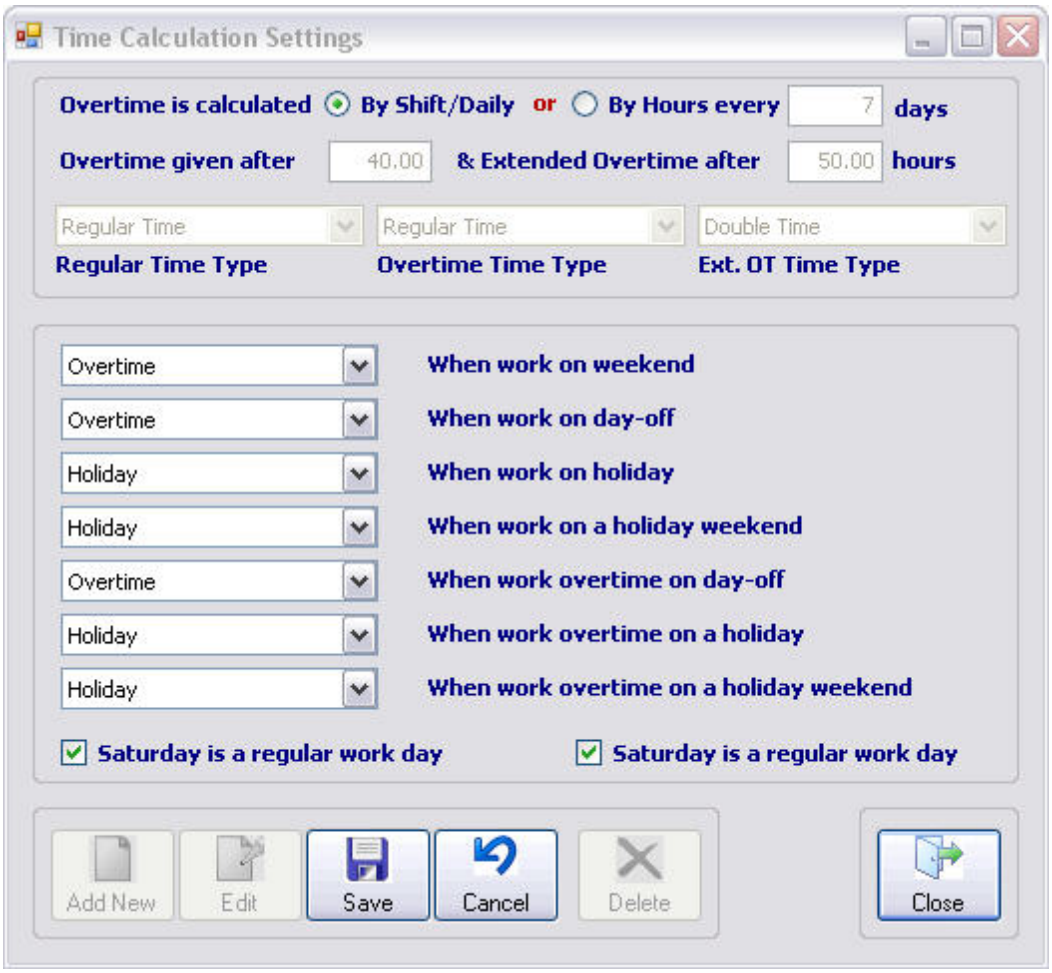


See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.2.7 Time Calculator Settings

Enter topic text here.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.3 Payroll Setup

Enter topic text here.

4.4.3.1 Payment Types

The SMART Schedule Master system allows you to add and configure different staff incentive types that are used by your organisation; this feature is known as "Payment Types".

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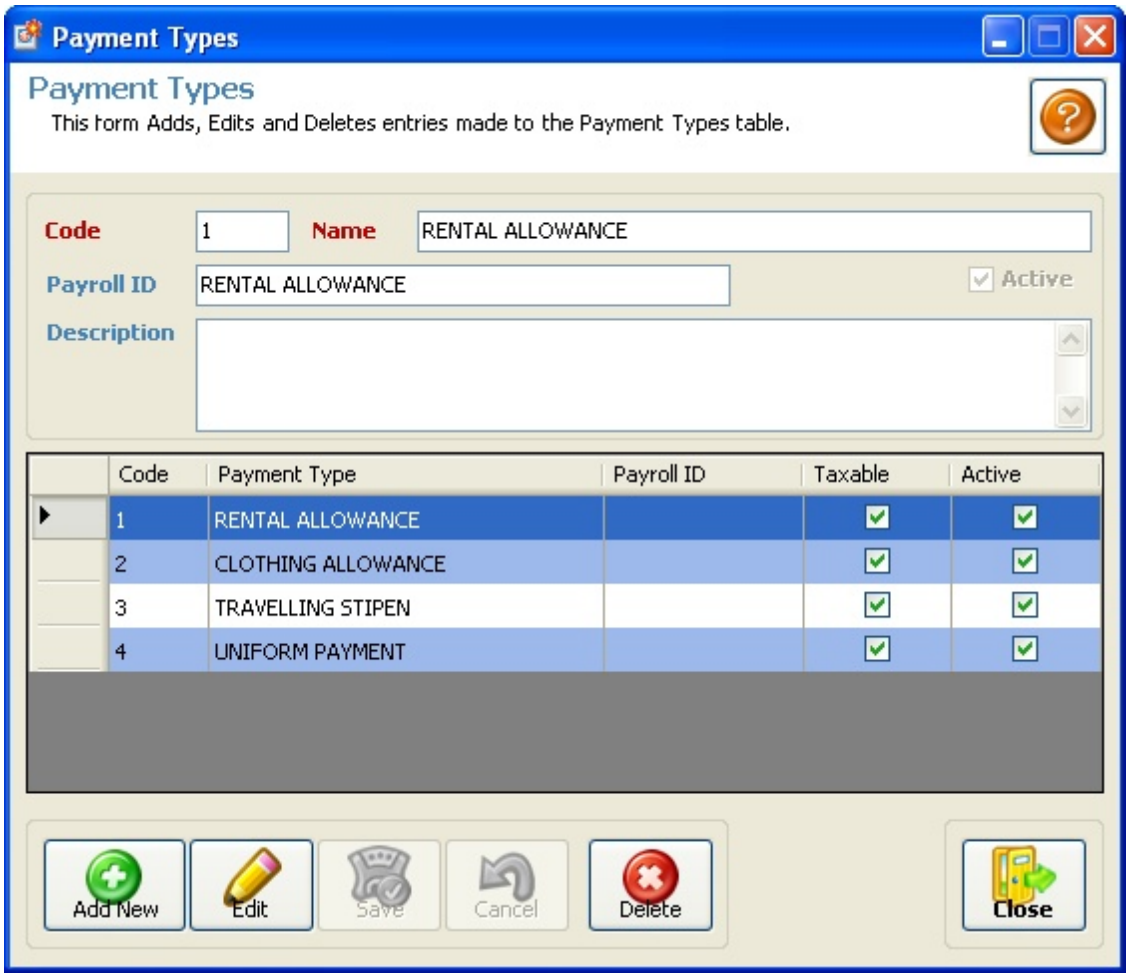

To get to the "Payment Types" dialog window, you must first navigate to the "Main Menu" => "Tools & Options" => "Payroll Setup" => "Payment Types".

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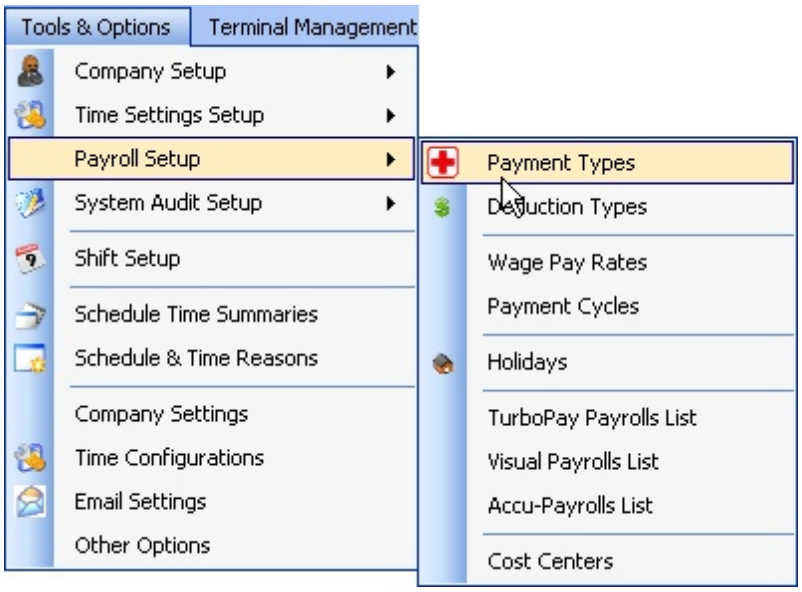

See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

4.4.3.2 Deduction Types

The SMART Schedule Master system allows you to add and configure different staff salary deductions that are instituted by your organisation; this feature is known as "Deduction Types".

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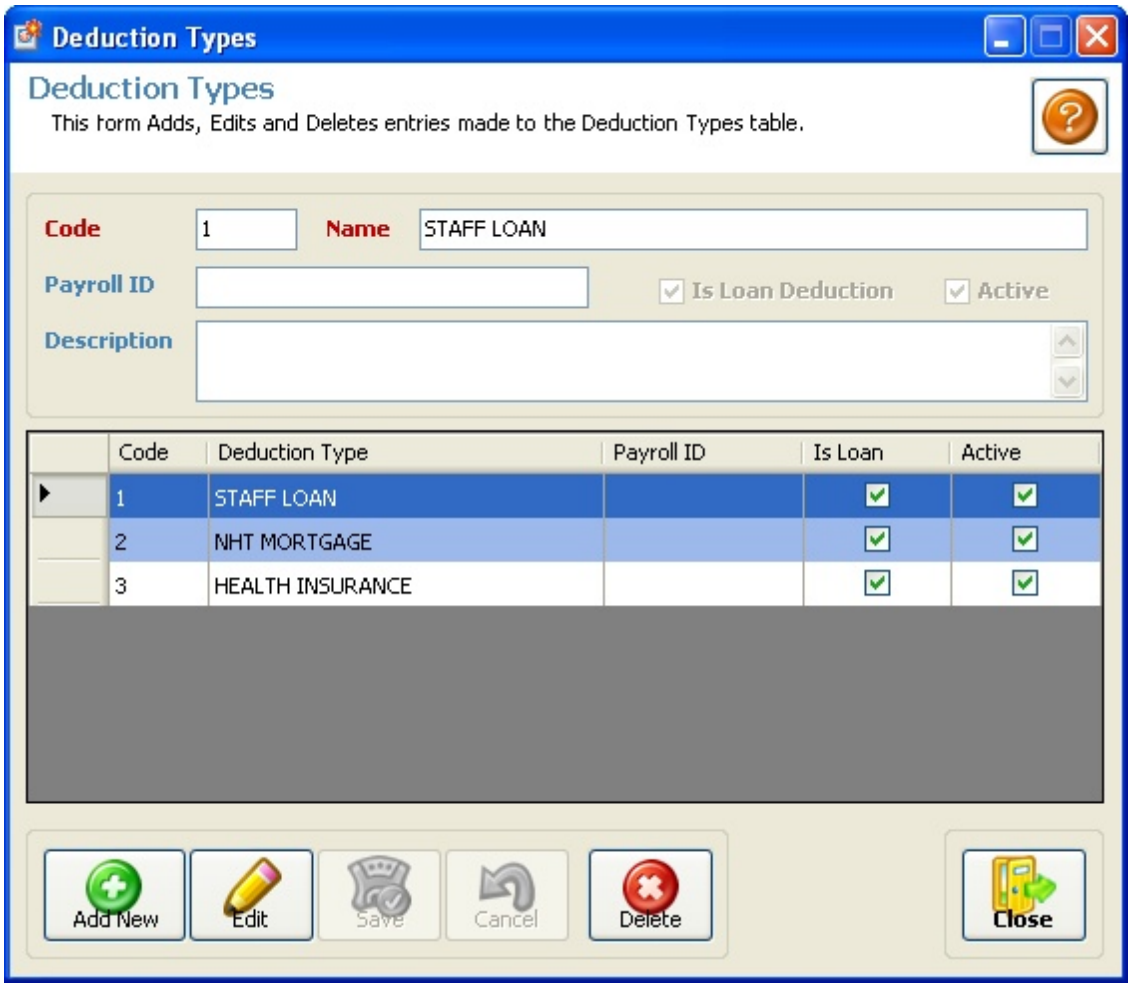

To get to the "Deduction Types" dialog window, you must first navigate to the "Main Menu" => "Tools & Options" => "Payroll Setup" => "Deduction Types".

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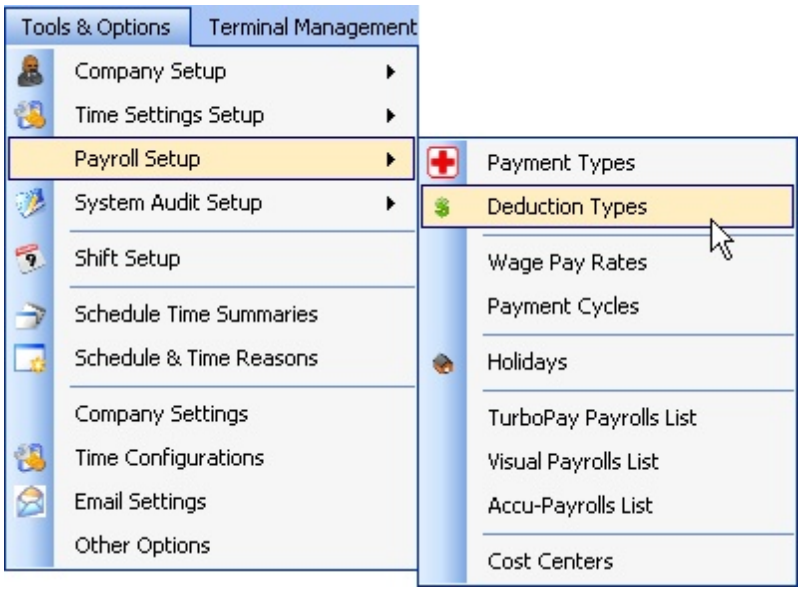

See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

4.4.3.3 Wage Pay Rates

The SMART Schedule Master system has the ability to add and configure different staff wage /pay rates. This feature is known as "Wage Pay Rates".

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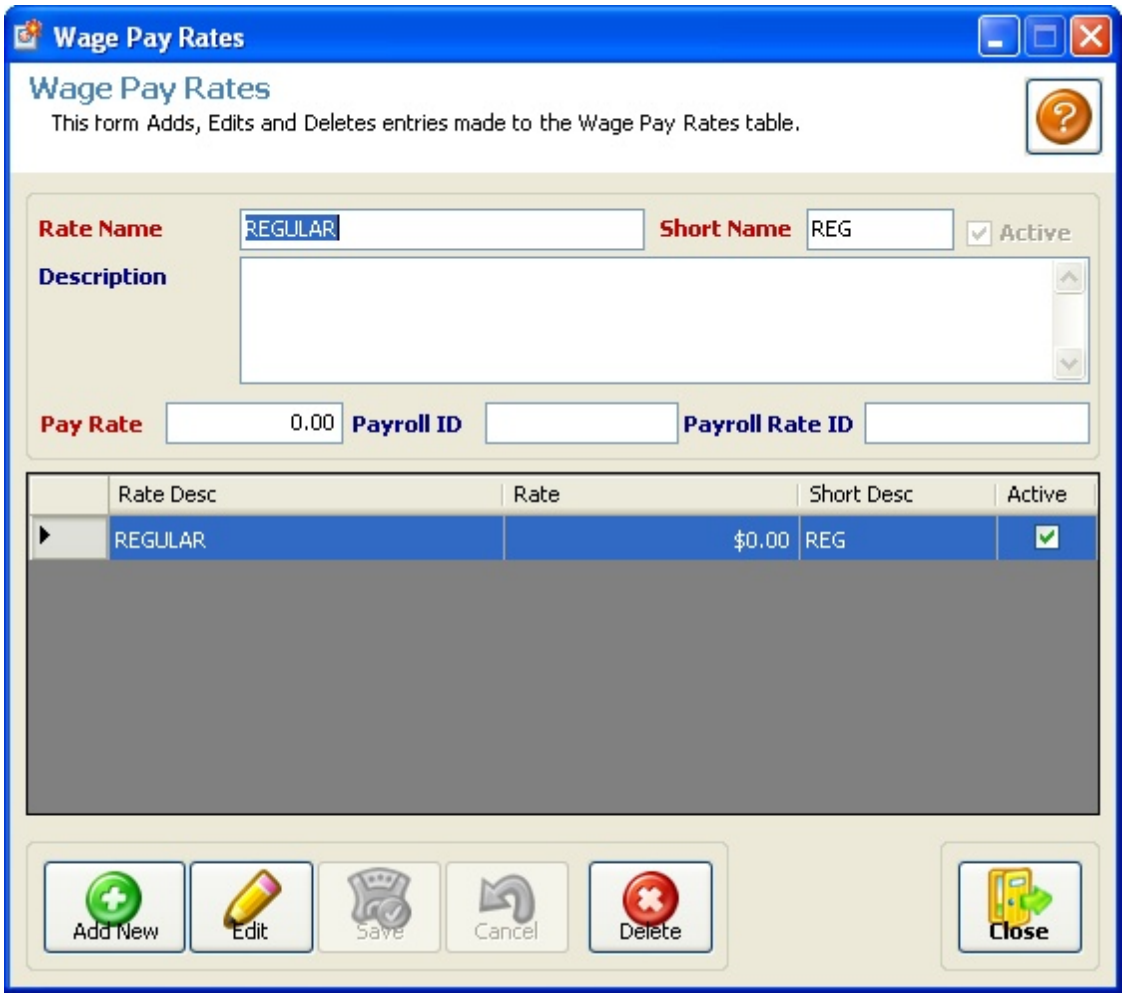
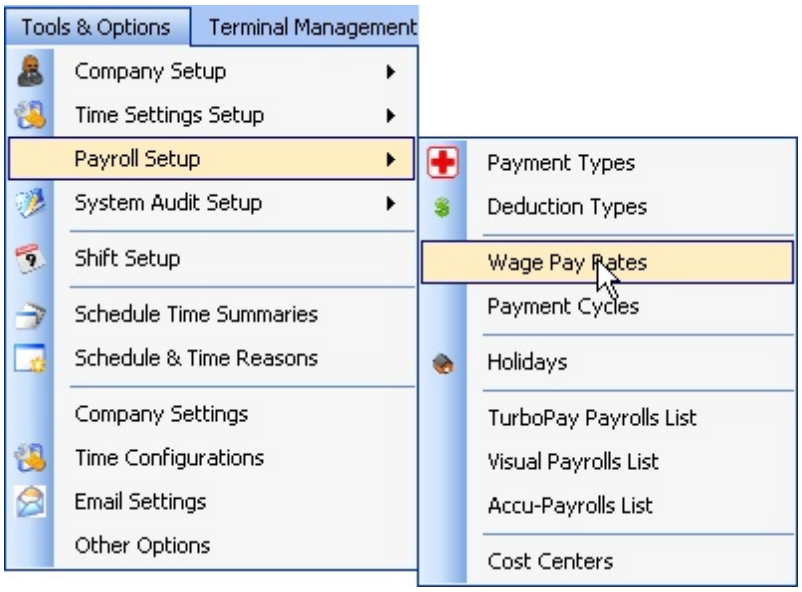


To get to the "Wage Pay Rates" dialog window, you will navigate to the "Main Menu" => "Tools & Options" => "Payroll Setup" => "Wage Pay Rates".



See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

4.4.3.4 Payment Cycles

The SMART Schedule Master system has the ability to add and configure different pay cycles. This feature is known as "Payment Cycles".

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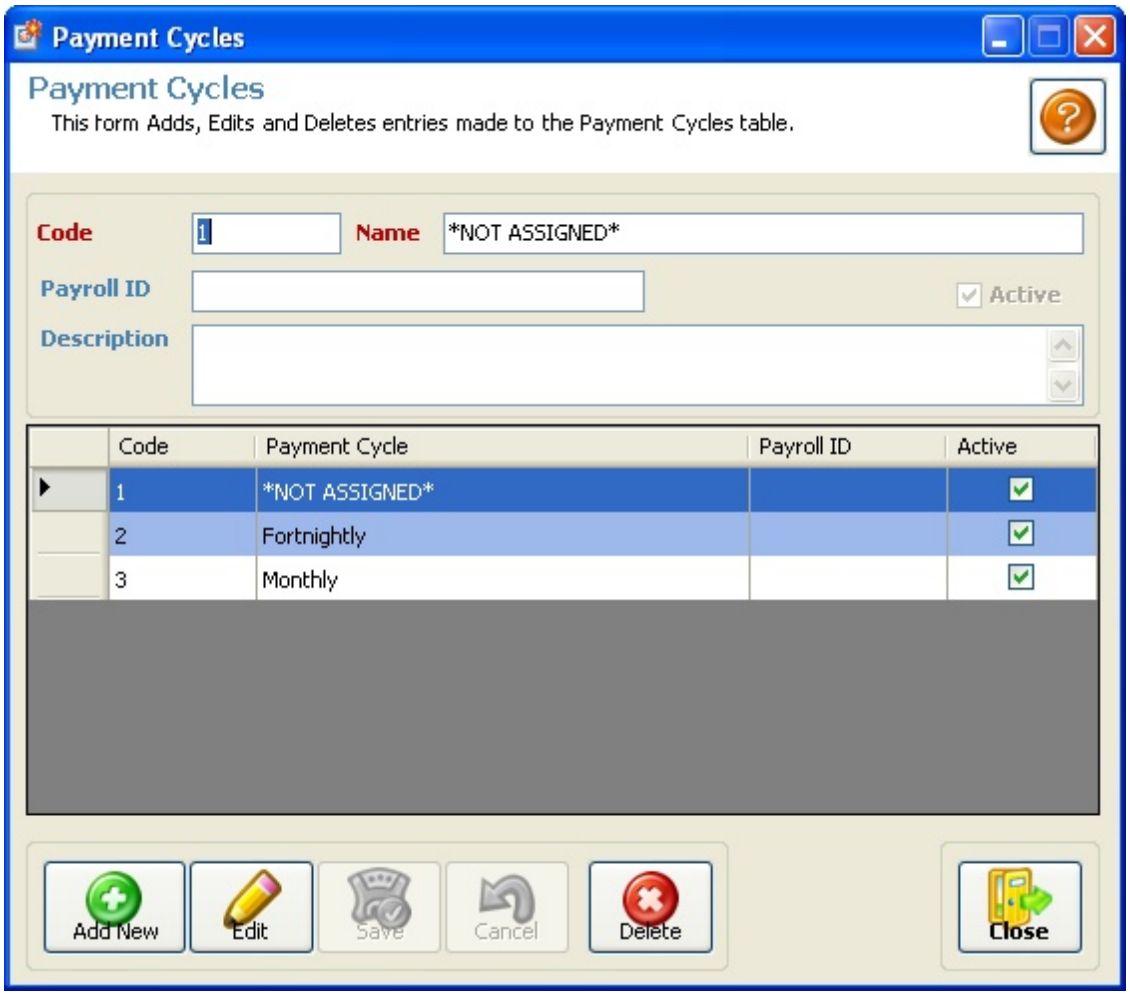

To get to the "Wage Pay Rates" dialog window, you will navigate to the "Main Menu" => "Tools & Options" => "Payroll Setup" => "Payment Cycle".

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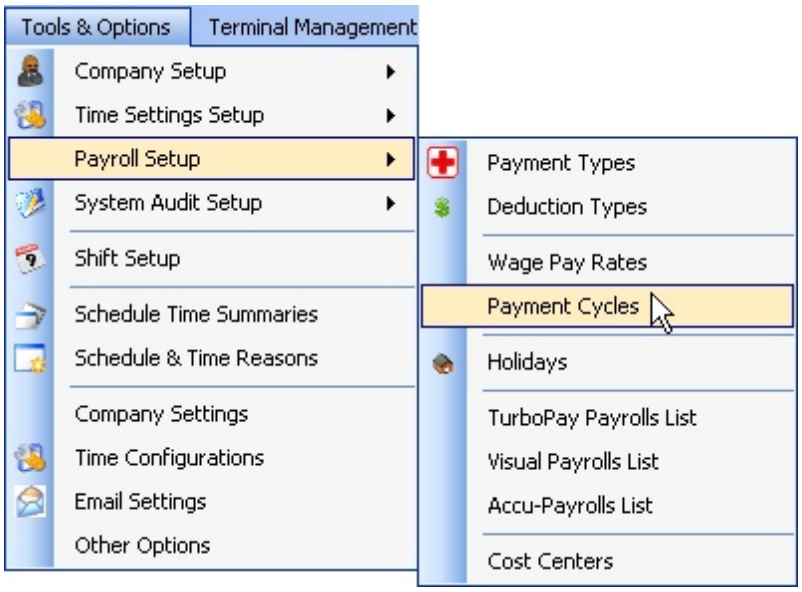

See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

4.4.3.5 Holidays

The SMART Schedule Master system allows you to set holidays observed by your organisation along with additional features that allow you to indicate whether or not an employee should be paid for the observed holiday. To get to this window you must navigate to the "Main Menu" => "Tools & Options" => "Payroll Setup" => "Holidays".

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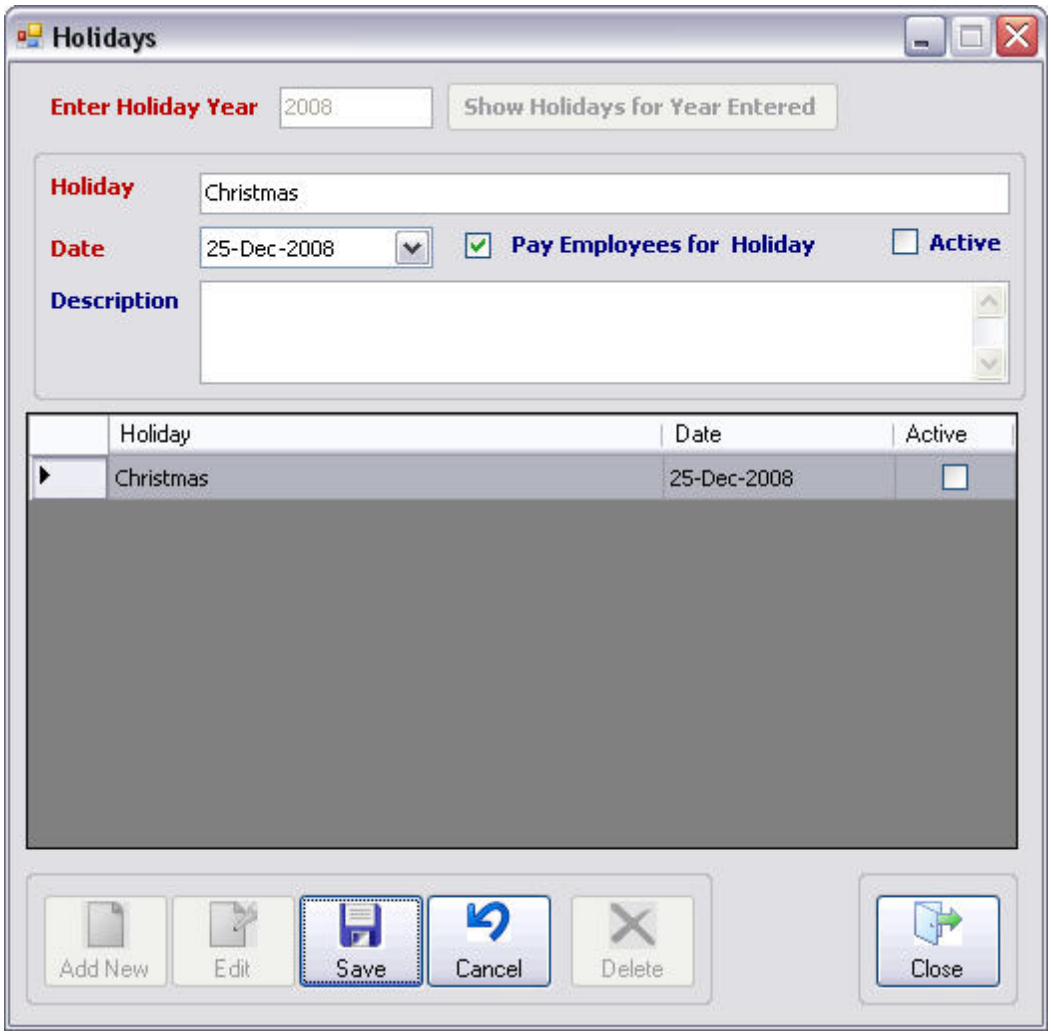

See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

4.4.3.6 Turbo Pay Payrolls List

Enter topic text here.

4.4.3.7 Visual Payrolls List

Enter topic text here.

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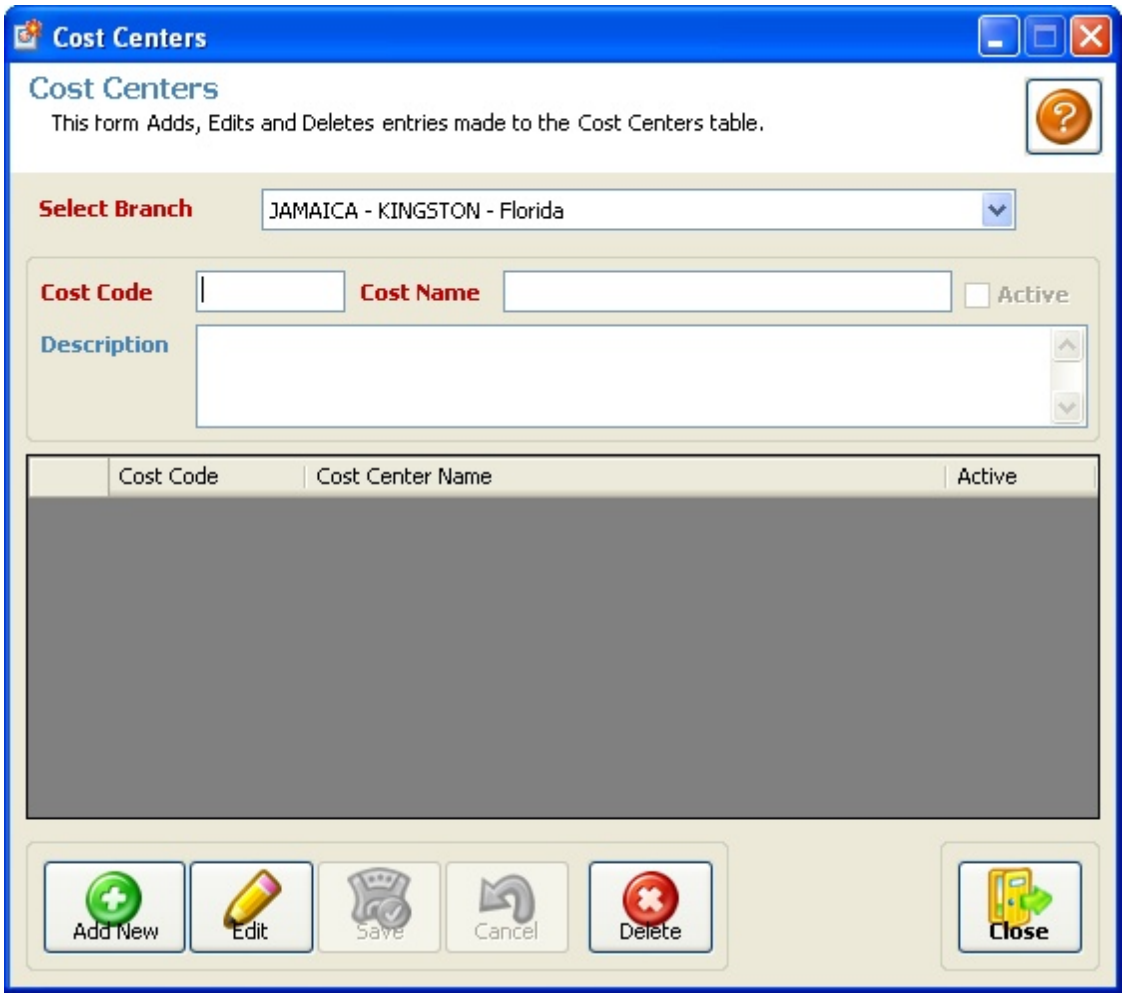
4.4.3.8 Accu-Payrolls List

Enter topic text here.

4.4.3.9 Cost Centers

The SMART Schedule Master system has the ability to add and configure different pay cycles. This feature is known as "Payment Cycles".



To get to the "Cost Centers" dialog window, you will navigate to the "Main Menu" => "Tools & Options" => "Payroll Setup" => "Cost Centers".

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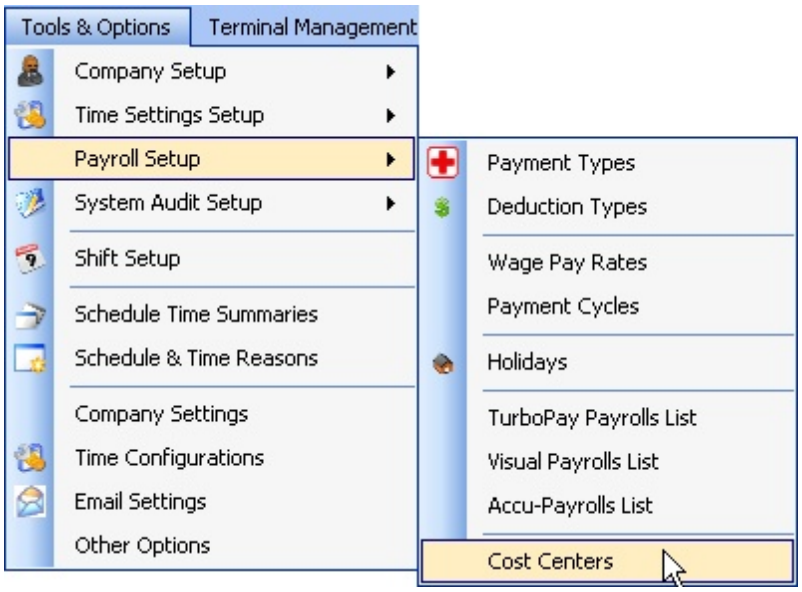

See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

4.4.4 System Audit Setup

4.4.4.1 Audit Table Options

Enter topic text here.

4.4.4.2 System Audit Log

Enter topic text here.

4.4.5 Shift Setup

The SMART Schedule Master system allows you to add and configure the different work shifts that currently exist within your organisation; this feature is called "Shift Setup".

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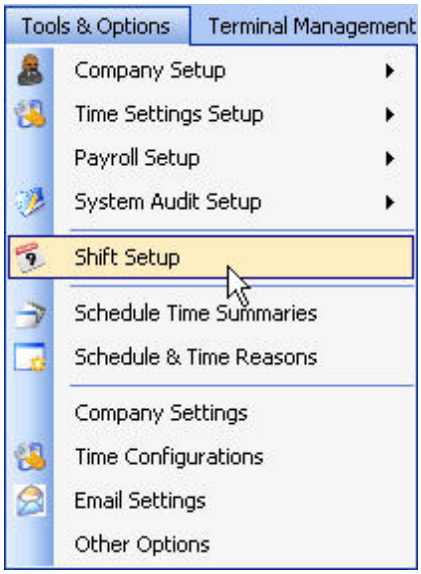

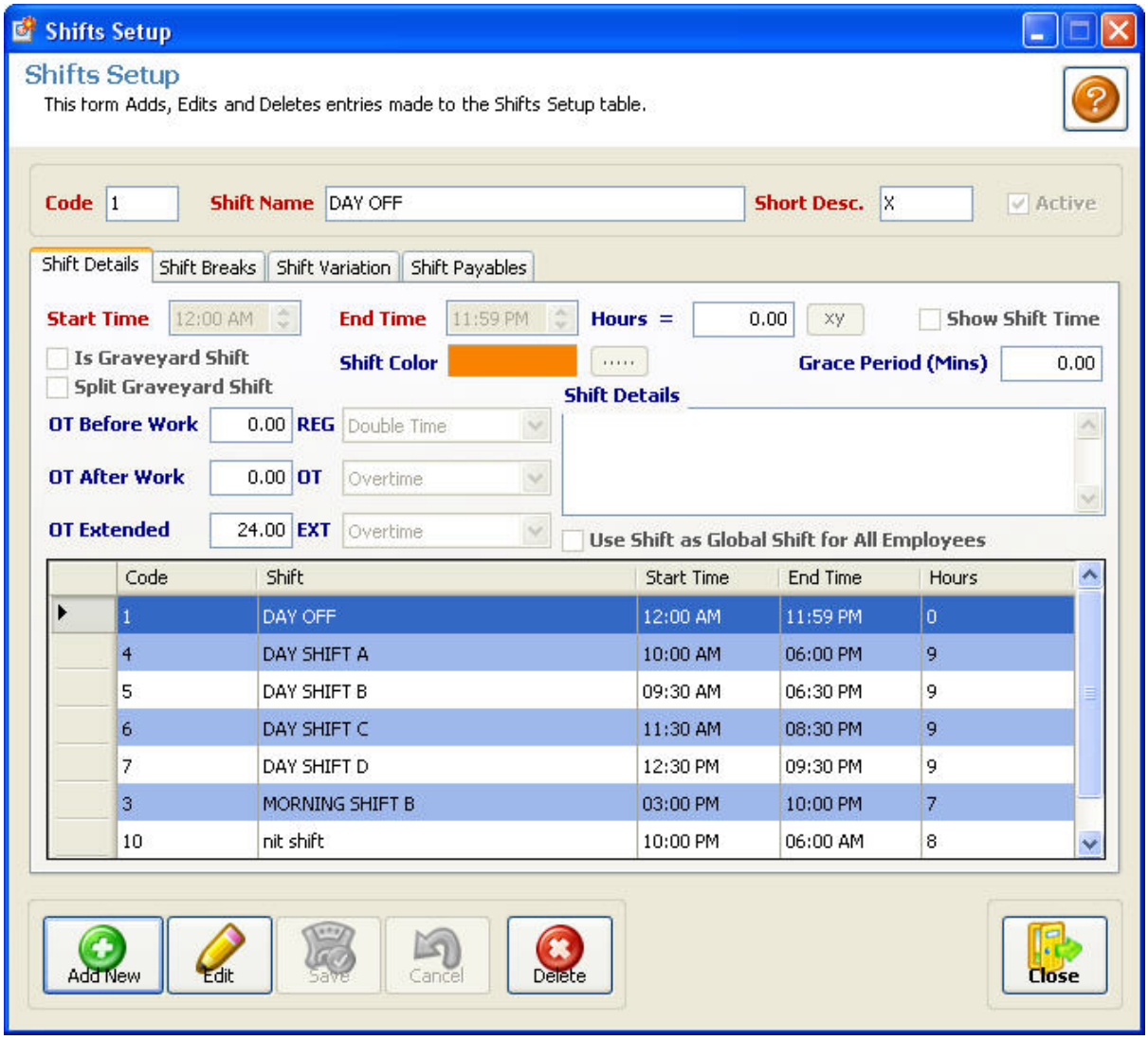

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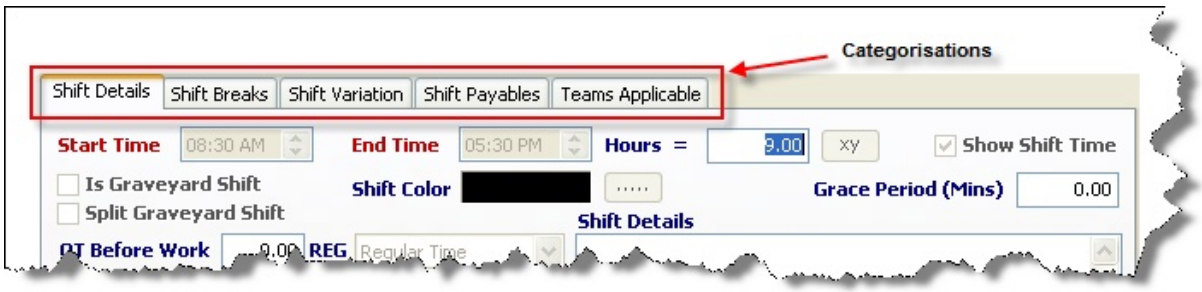
The Shift Setup dialog categorizes the shift into four (4) major groupings; Details, Breaks, Payable's and Applicable. These groupings are represented by separate tabs on the form.



The listing of all the Shifts currently configured in the system is shown in the Grid View on the form. You can select a Shift by left mouse clicking on it. After selecting a Shift you able to manipulate it, see Add, Edit and Delete topics for more details on how you may carry out those functions on shifts.

Code	Shift	Start Time	End Time	Hours
2	*UN SCHEDULED*	12:00 AM	12:00 AM	0
3	A SHIFT	03:30 AM	12:30 PM	9
4	B SHIFT	08:30 AM	05:30 PM	9
5	C.E.M SHIFT	12:00 PM	09:00 PM	9
8	D SHIFT	09:00 AM	05:00 PM	8
1	DAY OFF	12:00 PM	12:00 PM	0
6	E.C SHIFT	01:00 PM	10:00 PM	9

The Shifts Setup module of the program allows for the user manipulate the specifics of a particular shifts. Since no two shifts may be the same, maintenance should be carried out in this module.

For comprehensive manipulation of the shifts, the user must enter the following information:

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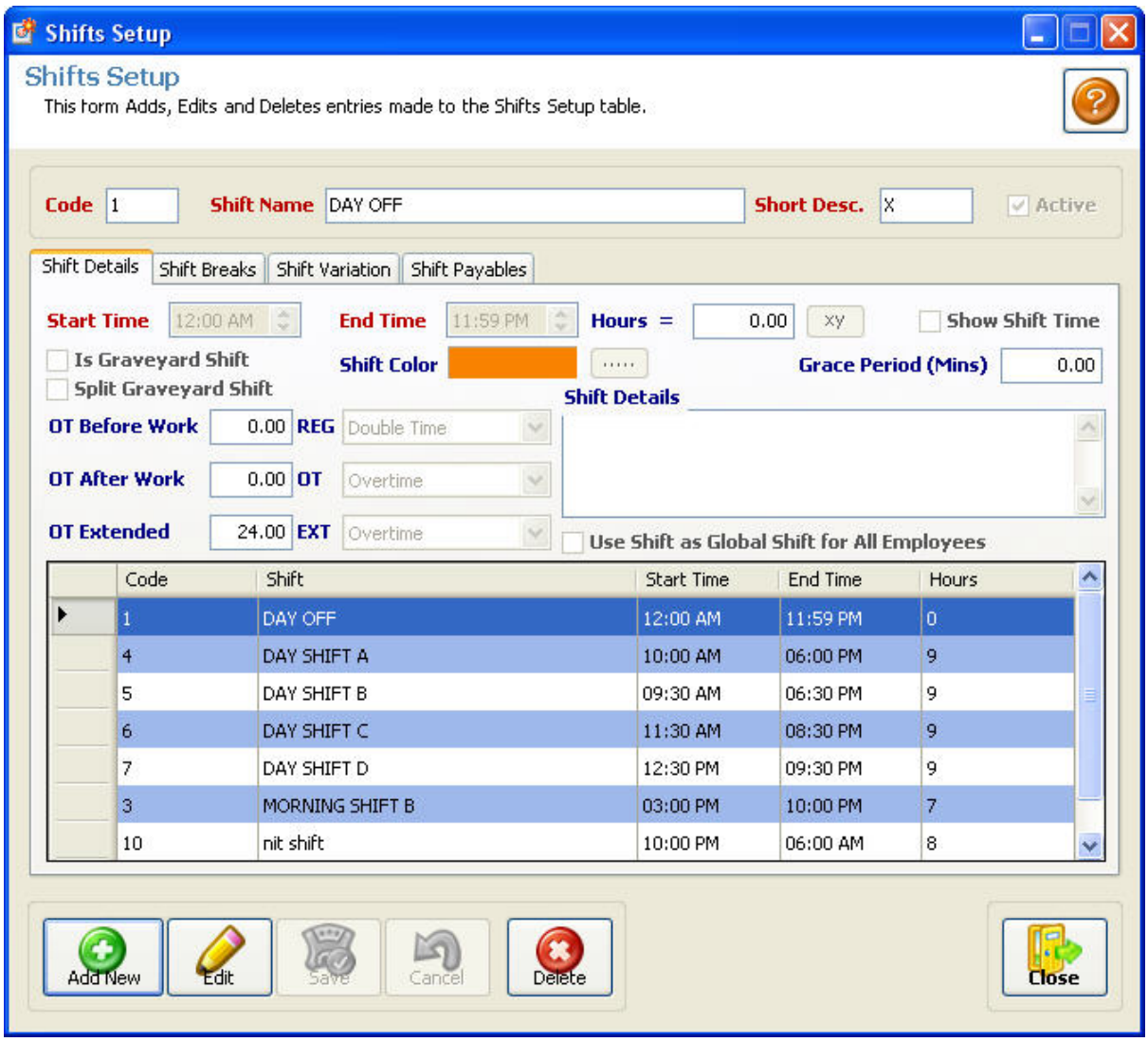
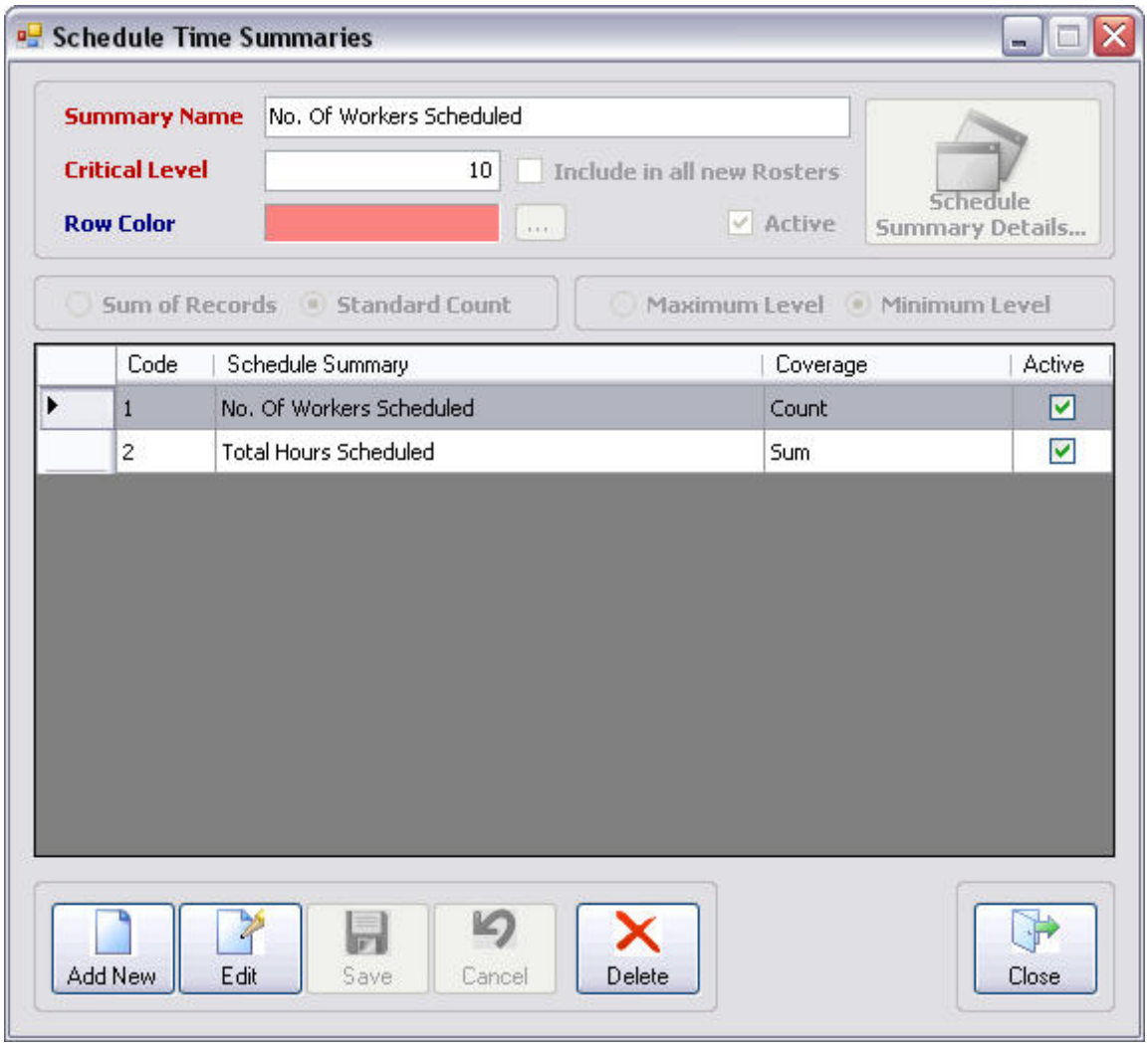
1. Code
2. Shift Name
3. Short Description
4. Start Time
5. End Time

After submitting the required information, click close to return to the previous menu.



4.4.6 Schedule Time Summaries

The SMART Schedule Master system allows you to setup and configure schedule time summaries within the system. The "Schedule Time Summaries" dialog can be opened by navigating to the "Main Menu" => "Tools & Options" and clicking on the "Schedule Time Summaries" menu option.



See Add, Edit and Delete topics, to understand how to maneuver this dialog window on how to make changes to database records.

As the menu title suggests, the Schedule Time Summaries, allows the user to summarize items such as the number of workers on a particular shift or the number of hours.

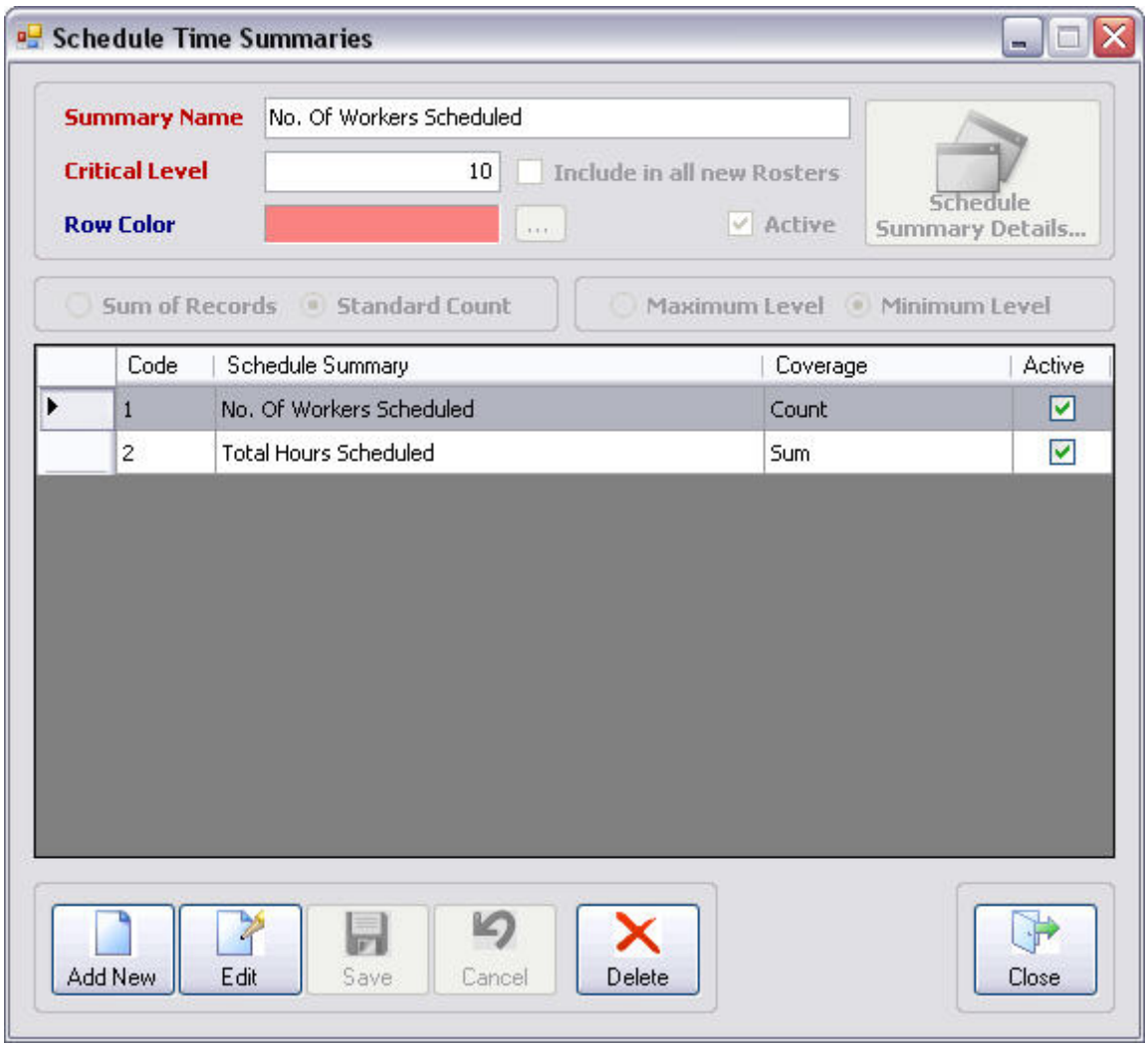
For effective maintenance to this menu, the following must be provided before

attempting to save the change:

Summary Name

Critical Level

Though not mandatory,t eh user may also include the color of the row, may indicate if the level of the summary is maximum or minimum, if the indicated summary is the standard count etc.



4.4.7 Schedule & Time Reasons

The SMART Schedule Master system allows you to add and configure the different reasons, that have already been instituted within your organisation for staff being off from work. This feature is known as "Schedule Reason" with in the Schedule Master system.

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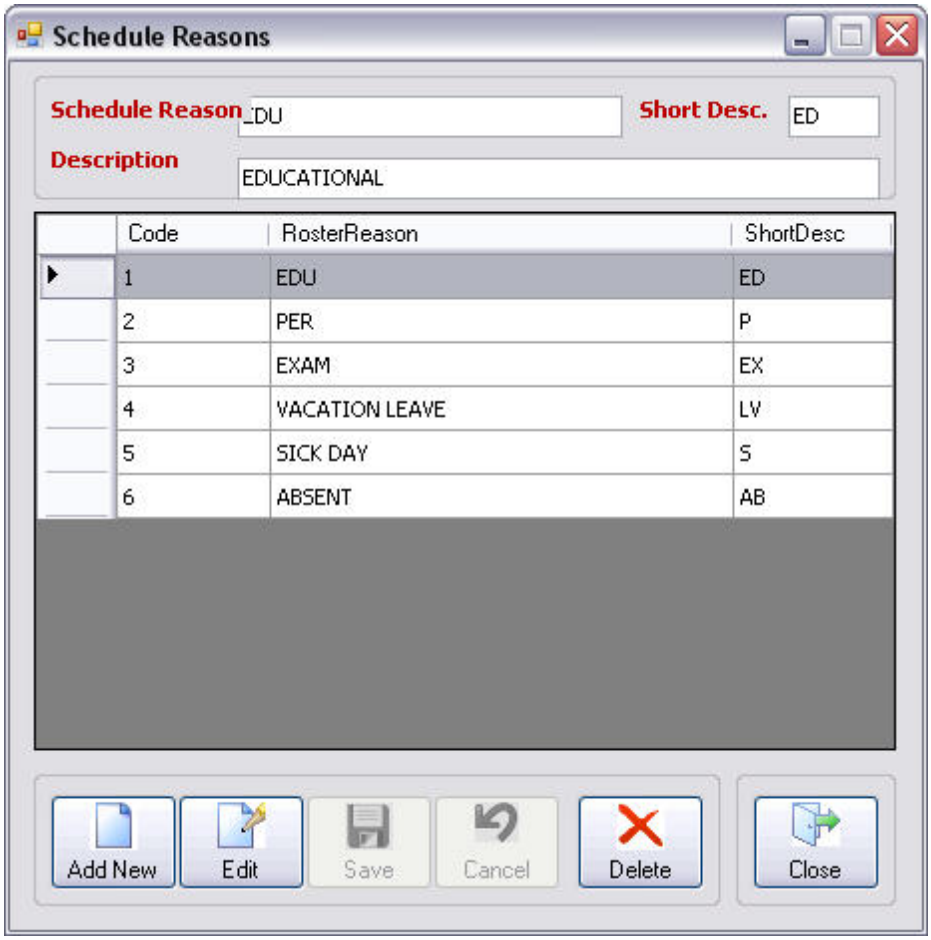
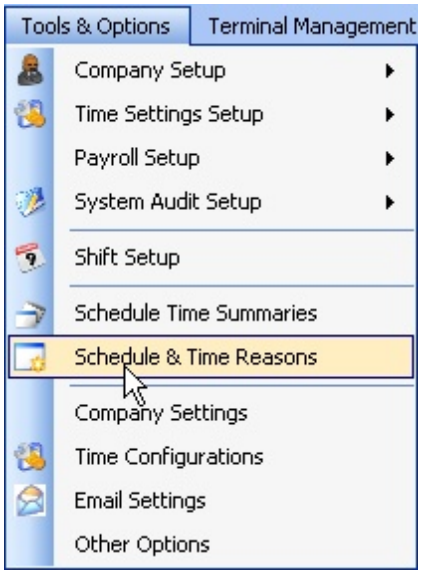


The "Schedule &Time Reasons" dialog can be opened by navigating to the "Main Menu" => "Tools & Options" and clicking on the "Schedule &Time Reasons" menu option.



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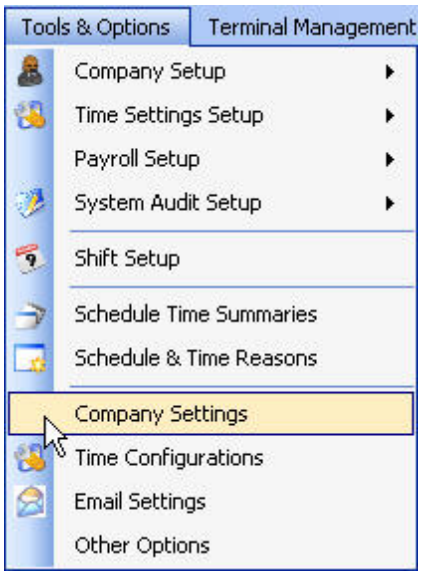
To understand and learn more about data manipulation with this form, please see Add, Edit and Delete topics.

4.4.8 Company Settings

The company and time setting is broken up into four categories:

1. Program Settings
2. Time Configuration
3. Email Settings
4. Other Options



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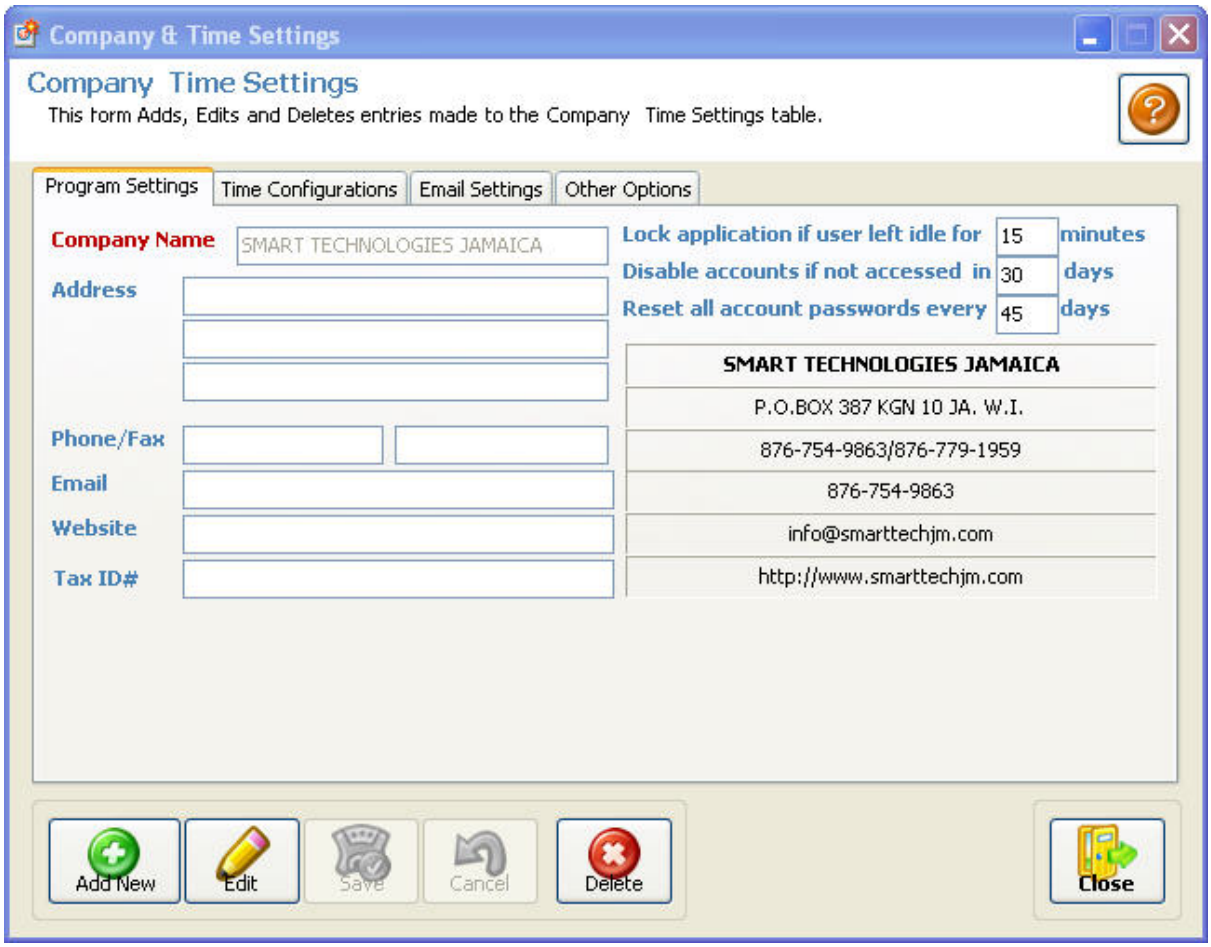
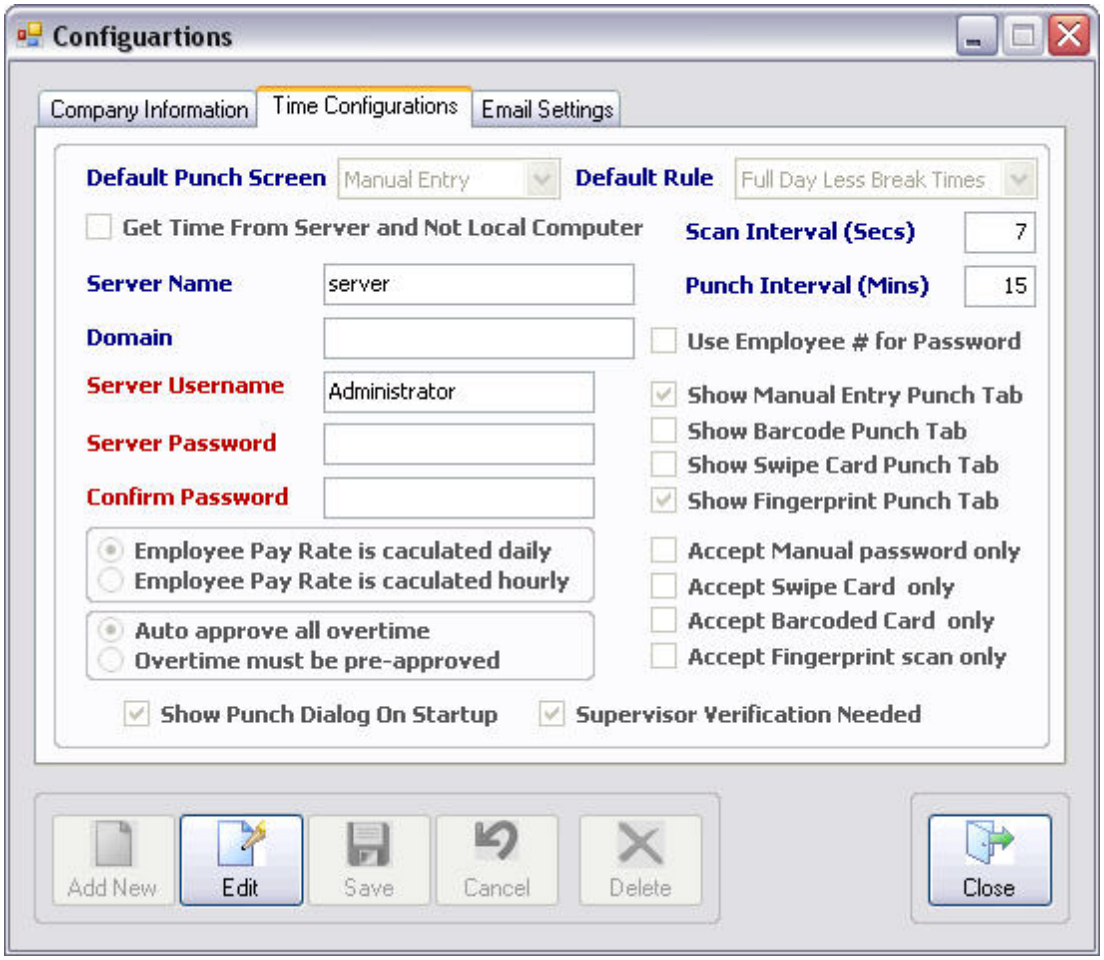


See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.4.9 Time Configurations



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

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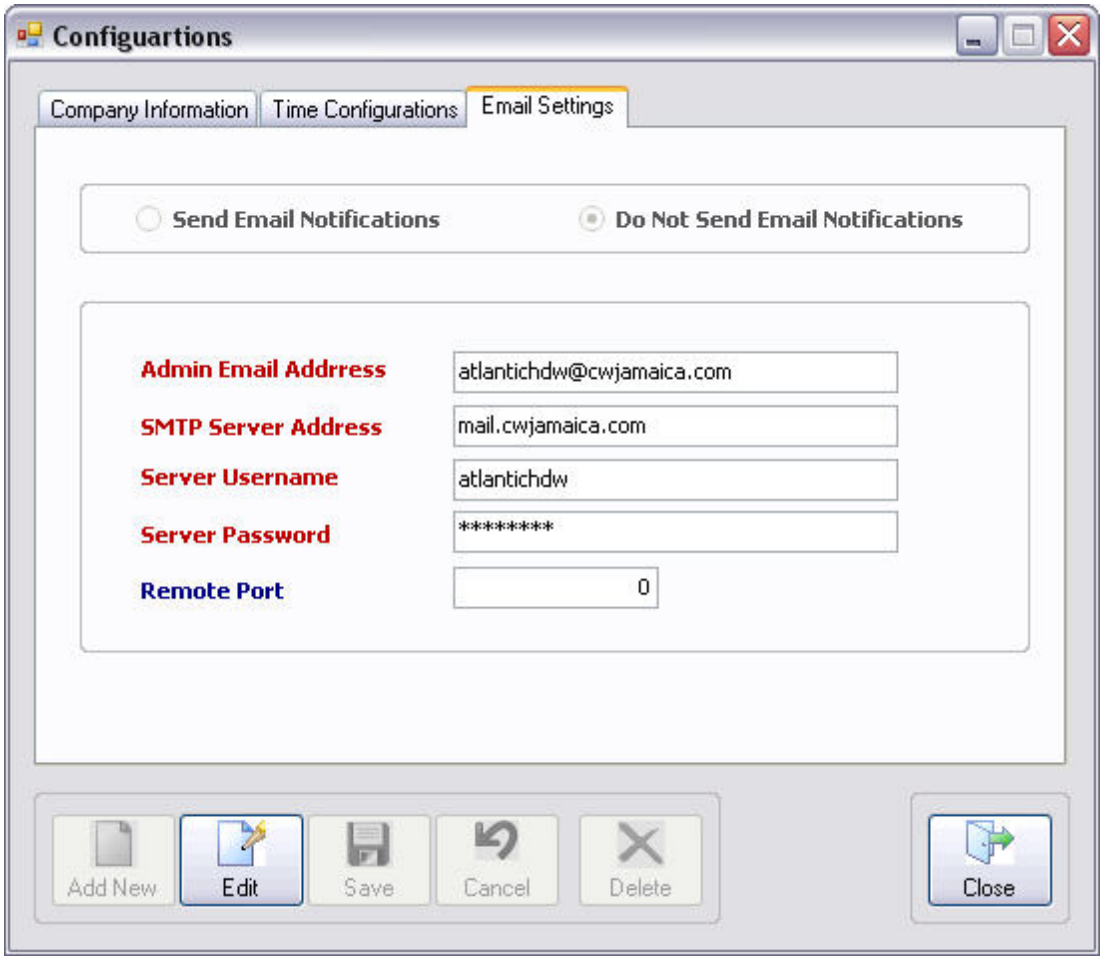
4.4.10 Email Settings



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

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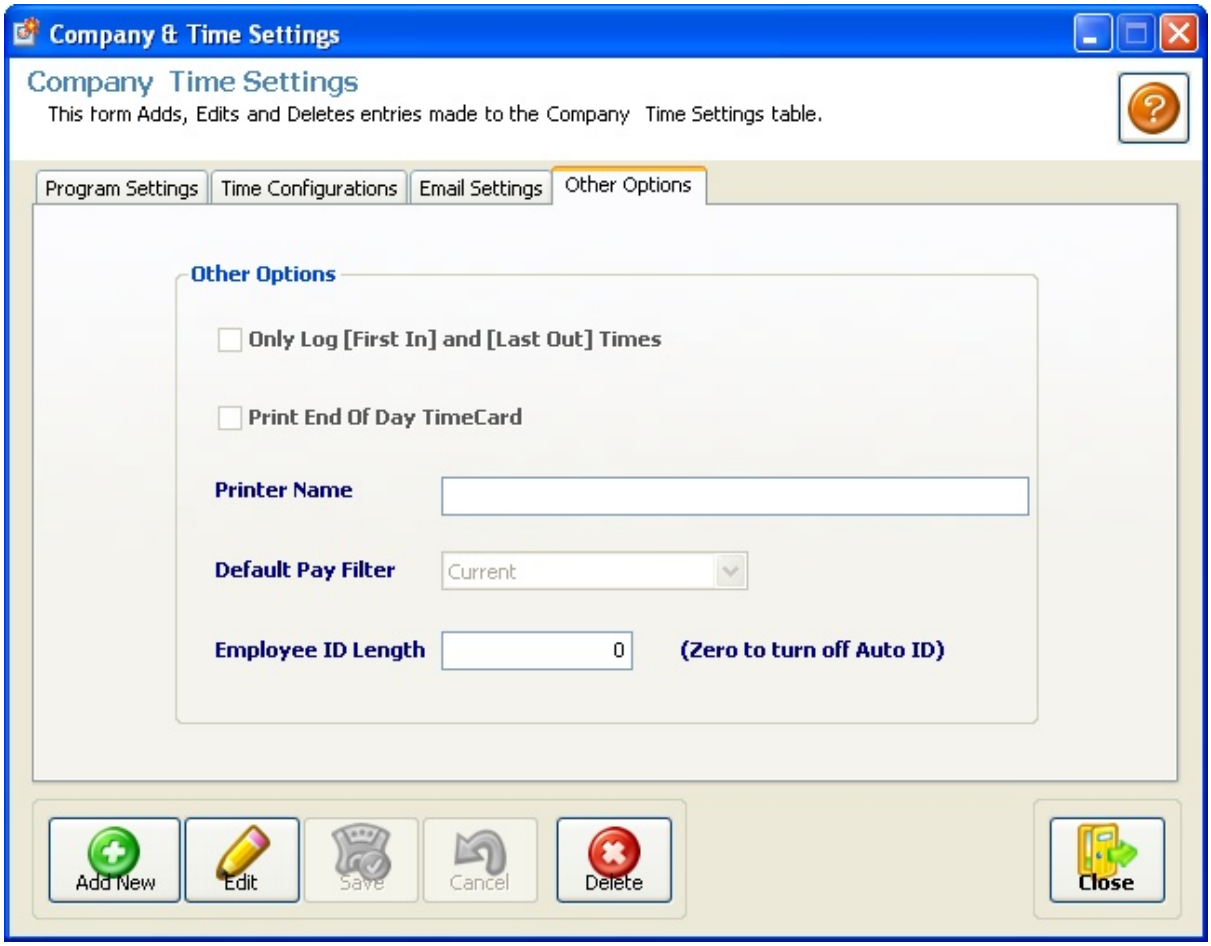
4.4.11 Other Options



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.5 Terminal Management Menu

The Terminal Management menu has all functions associated with managing the time clocks installed within the system such as:

- Registering new employees
- Updating existing employee information
- Deactivating employees
- Loading time data

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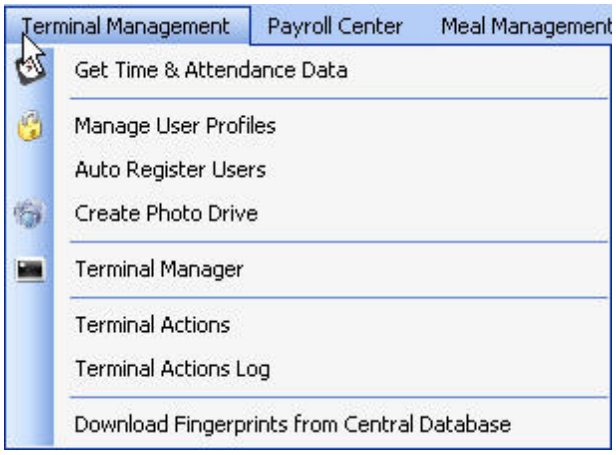
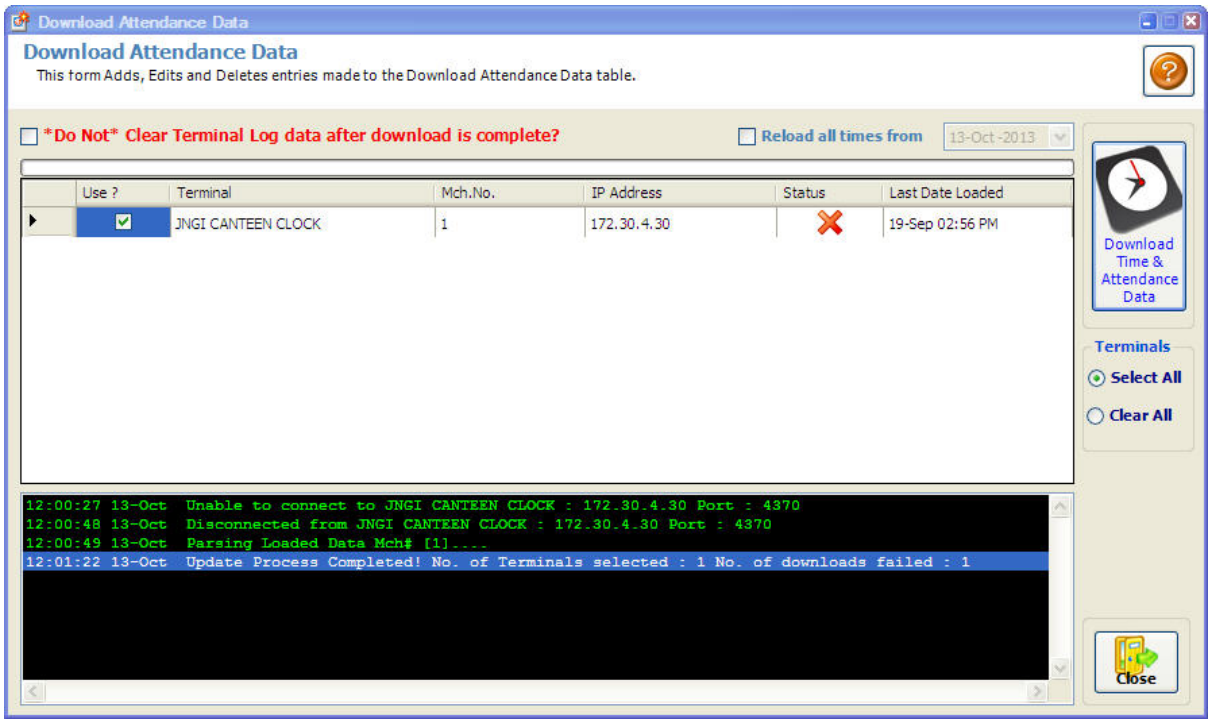


4.5.1 Get Time & Attendance Data

Time data is downloaded automatically by the database server on a periodic basis each day. Whenever a user requires time data outside of the time schedule set in Terminal Actions, they can download the time data by using this feature.



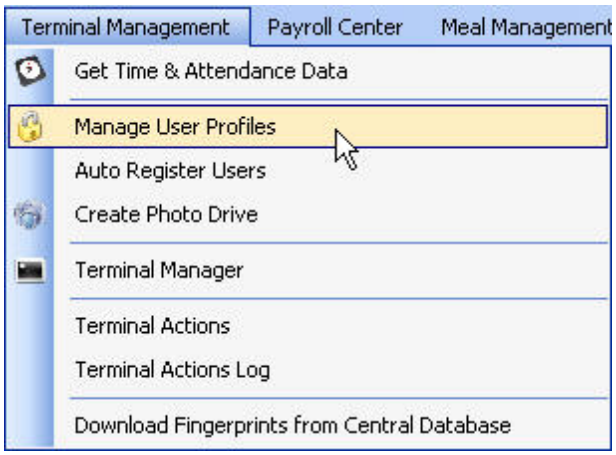
To download the time data:

- Tick the Use option beside each time clock in the list or use the select all option
- Press the Download Time & Attendance Data button and follow the onscreen instructions

The status of each data load will display in the status box with the black background and green font.

4.5.2 Mange User Profile

How to register Fingerprint/ Proximity Cards Electronically via Software



1. Go to menu TERMINAL MANAGEMENT >> MANAGE USER PROFILES
2. From the list of Terminals, select the Time Clock the employee is assigned to
3. From the list of users in the employee list, highlight the name of the employee
4. Click the Access Management tab.
5. Click the button Enroll User Fingerprint
    a. Use Enroll by Sensor if you are using a USB Enroller
    b. Use Enroll by Device to scan the employee fingerprint directly on the Time Clock
6. Follow the on screen instructions to complete the process

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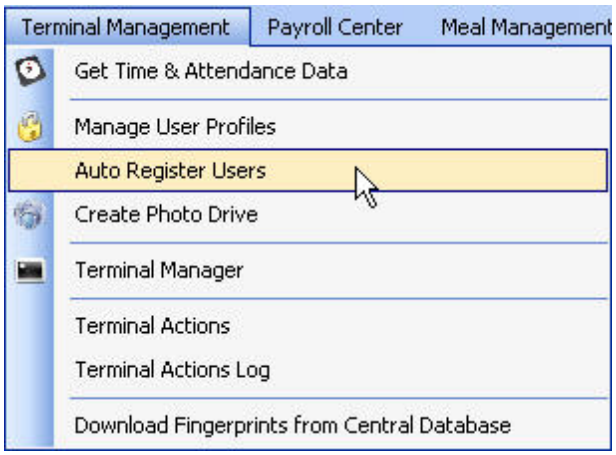
CLICK HERE for further instructions!

4.5.3 Auto Register User

Registering an Employee to a Time Clock



To register one or more users do:

1. Go to menu TERMINAL MANAGEMENT >> AUTO REGISTER USERS
2. Where it says “REGISTER USERS ON TERMINAL”, select the TIME CLOCK you wish to register the person on
3. NOTE: Select the appropriate filters to ensure that employees are not registered to the wrong clocks.
4. After filtering, choose the “SELECT ALL SELECTED” option if the USE column is not ticked for each employee.
5. Press the “AUTO REGISTER SELECTED EMPLOYEES TO TERMINAL” button to confirm and wait until done.

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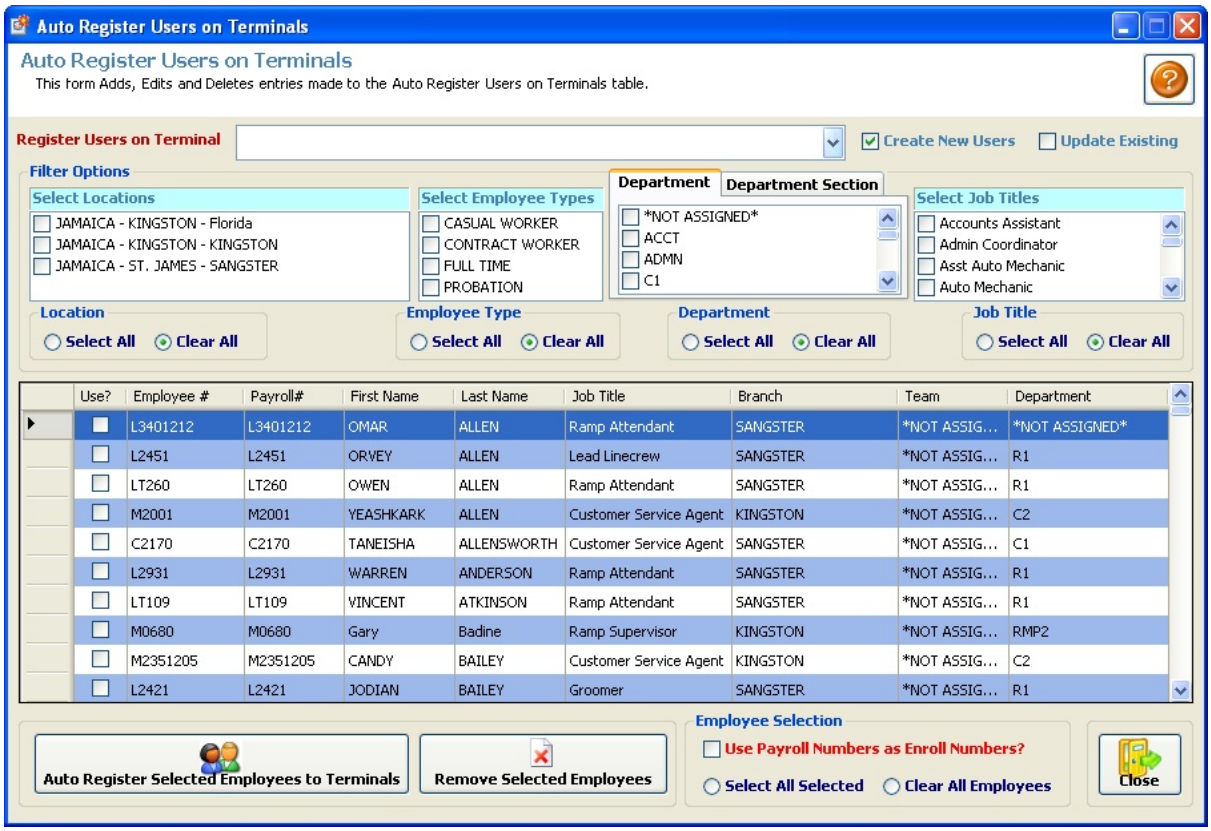
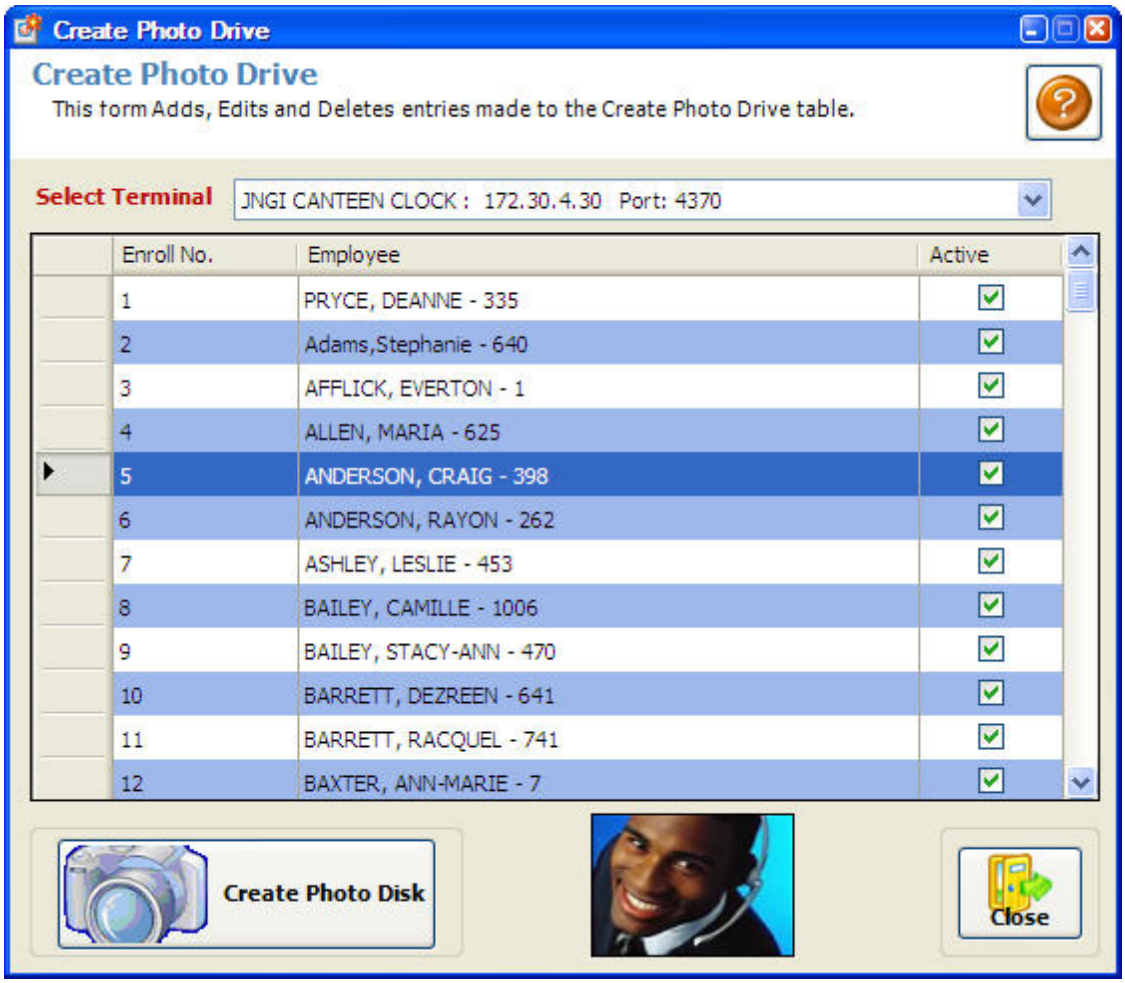


CLICK HERE for further instructions!

4.5.4 Create Photo Drive

All color screen time clocks can show the photo of the employee when they sign in/out.

This feature allows for a usb photo drive to be created for import to the time clock.



To create a photo drive do:

- Insert usb flash drive
- press the Create Photo Disk button and wait for process to be completed.

4.5.5 Terminal Manager

When a new time clock is installed, the system has to be configured with the new settings as well as within the time clock menu as well. The clock clock itself requires and IP Address, Gateway and Subnet Mask.

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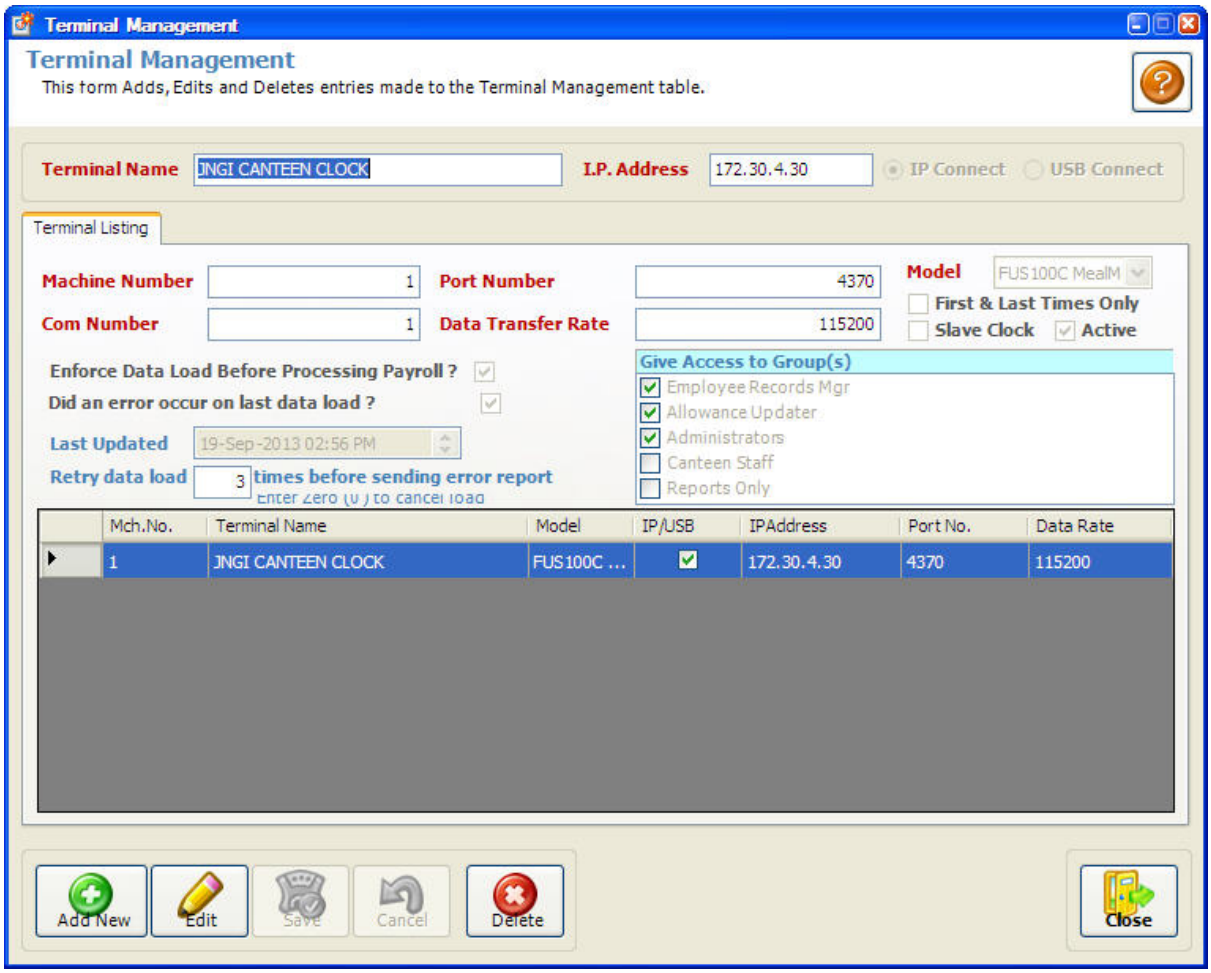

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.5.6 Terminal Actions

The Terminal Actions screen is used to define time interval to run server processes such as:

- Loading time data
- Syncing with SMART Staff HRM Software
- Deactivating separated employee profiles
- Enabling/Disabling employee meal accounts at breakfast, lunch or supper

This feature is usually setup by the system administrator.

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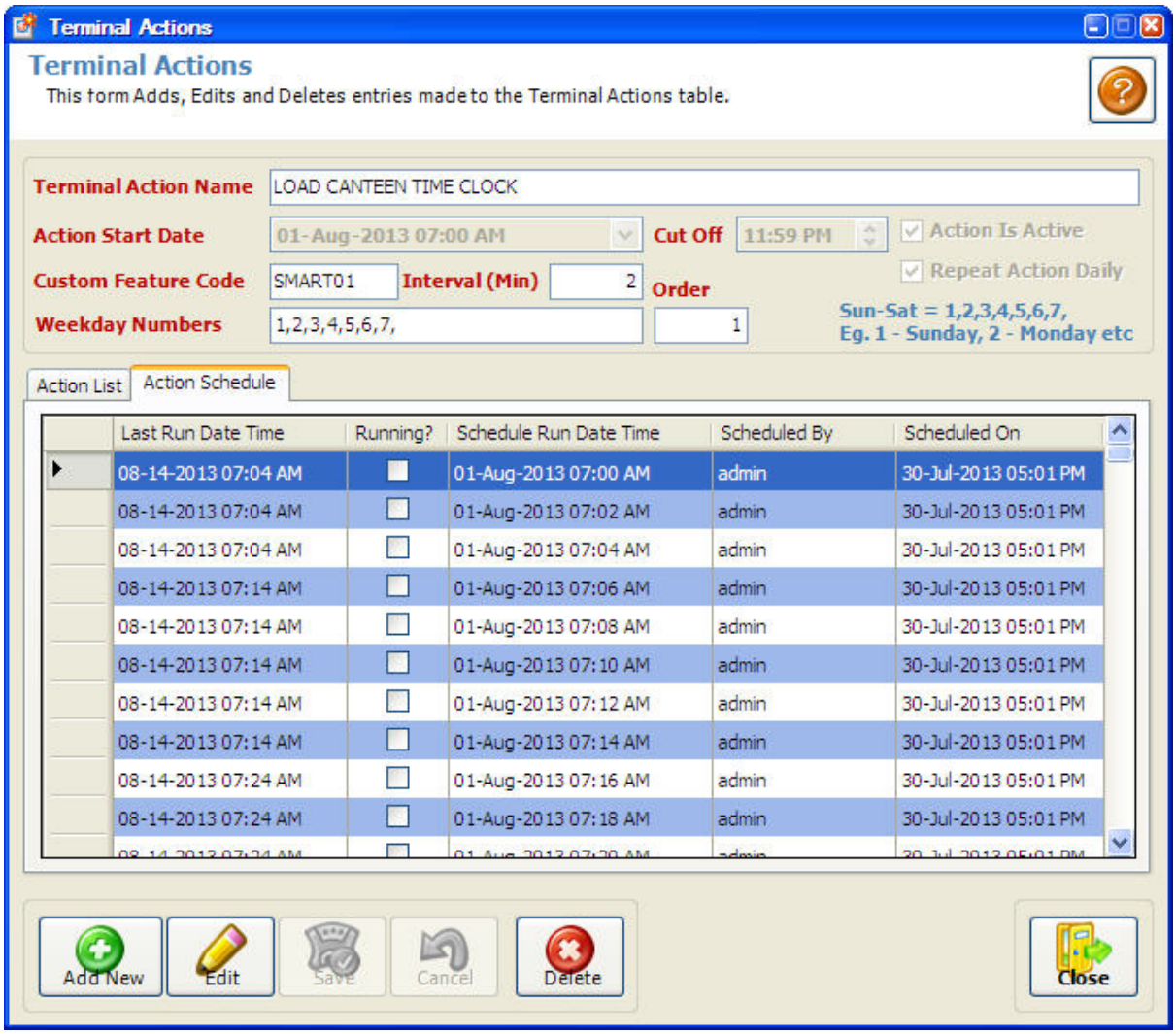

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.5.7 Terminal Actions Log

The Terminal Action Log shows a history of the server run date and times for all Terminal Actions scheduled and the result of those actions.

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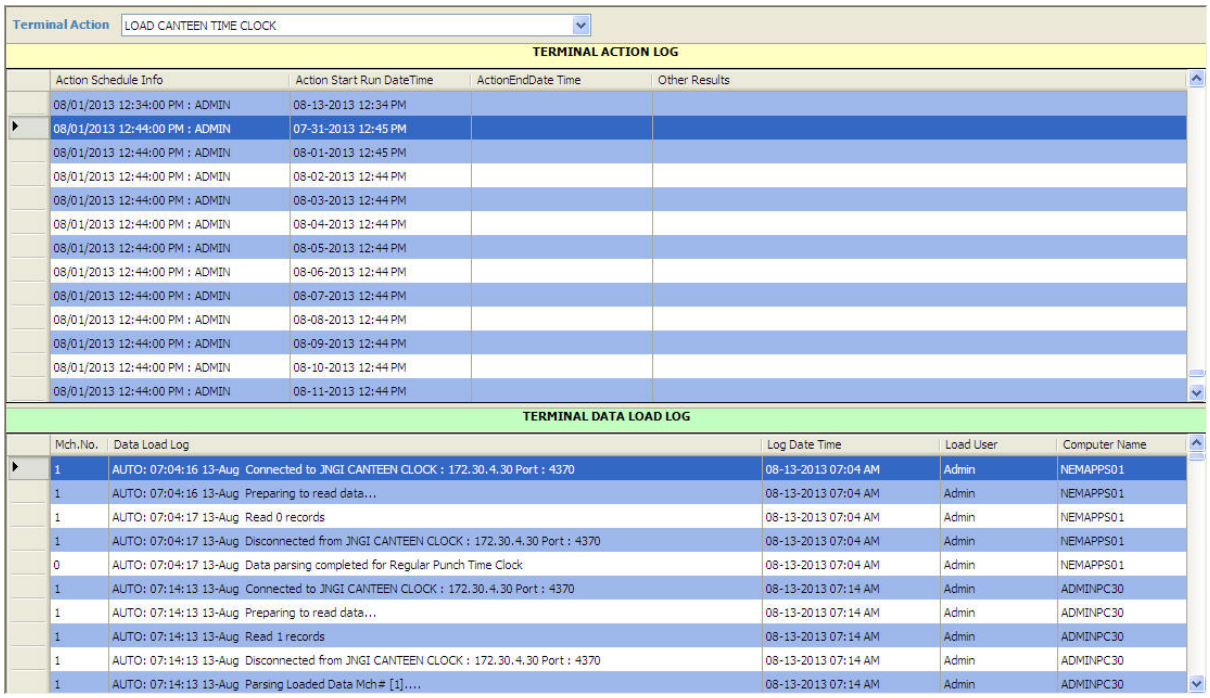
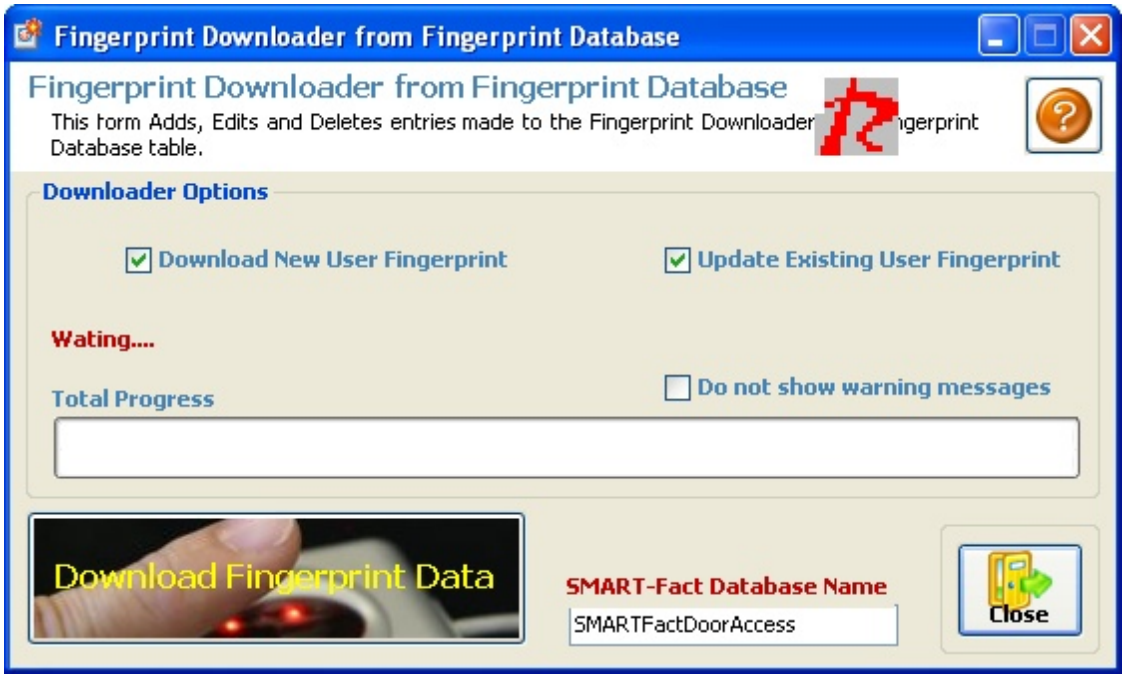
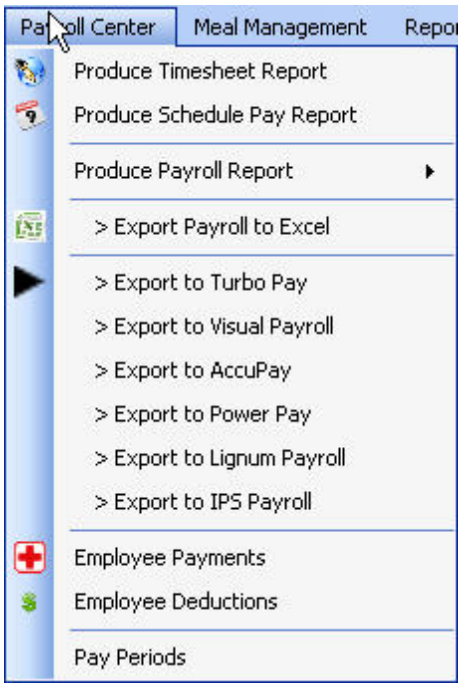


4.5.8 Download Fingerprints form central Databae

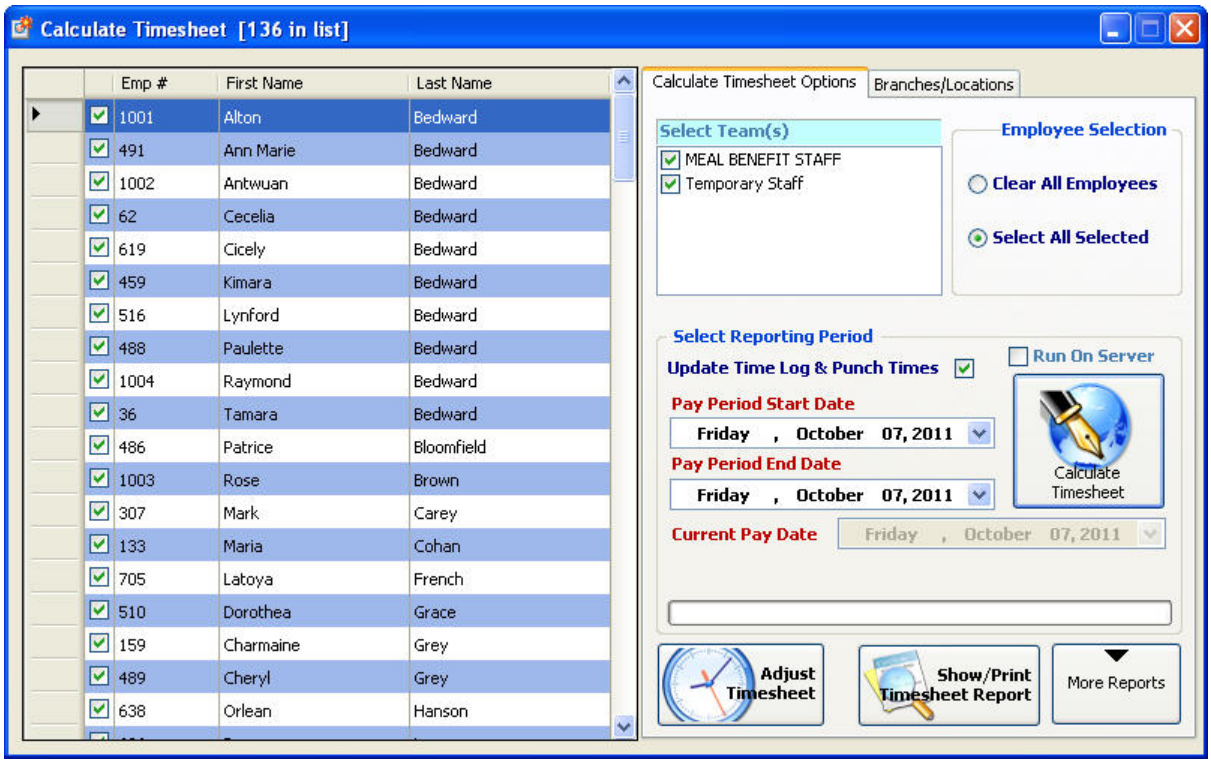
This feature is only used when ScheduleMaster is integrated with a door access system to share fingerprint data for users to avoid double enrolling.



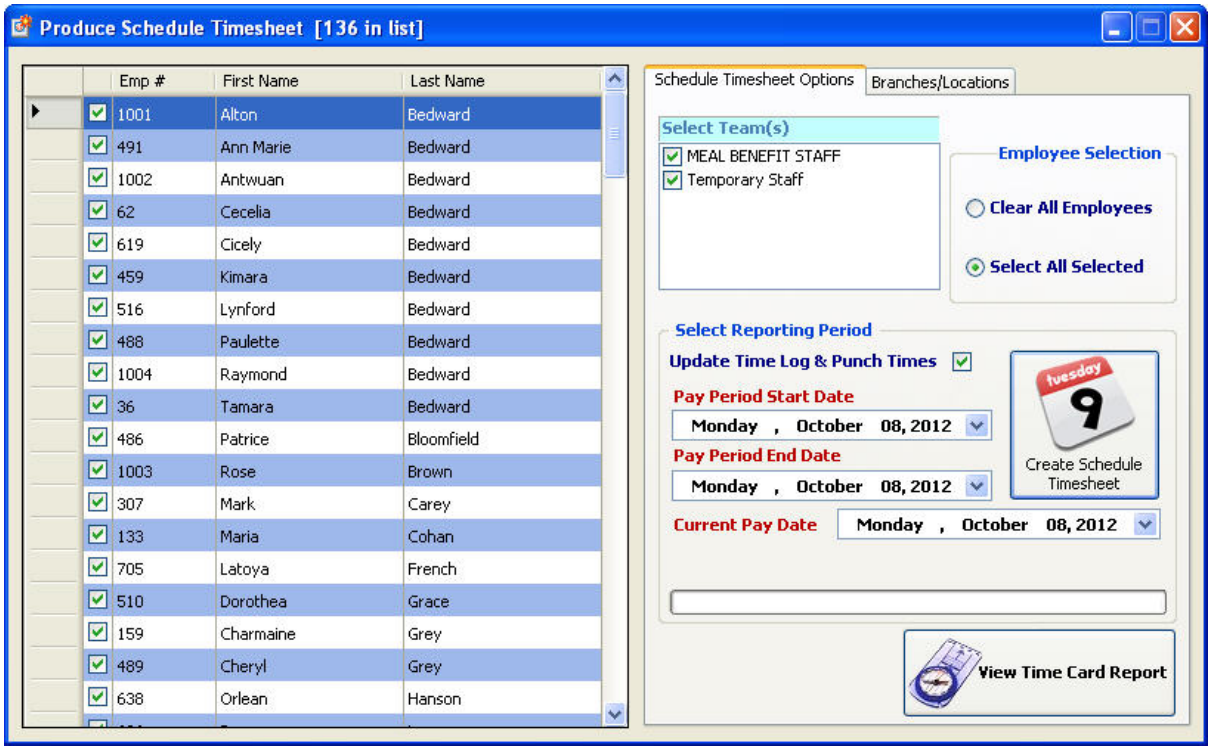
4.6 Payroll Centre Menu



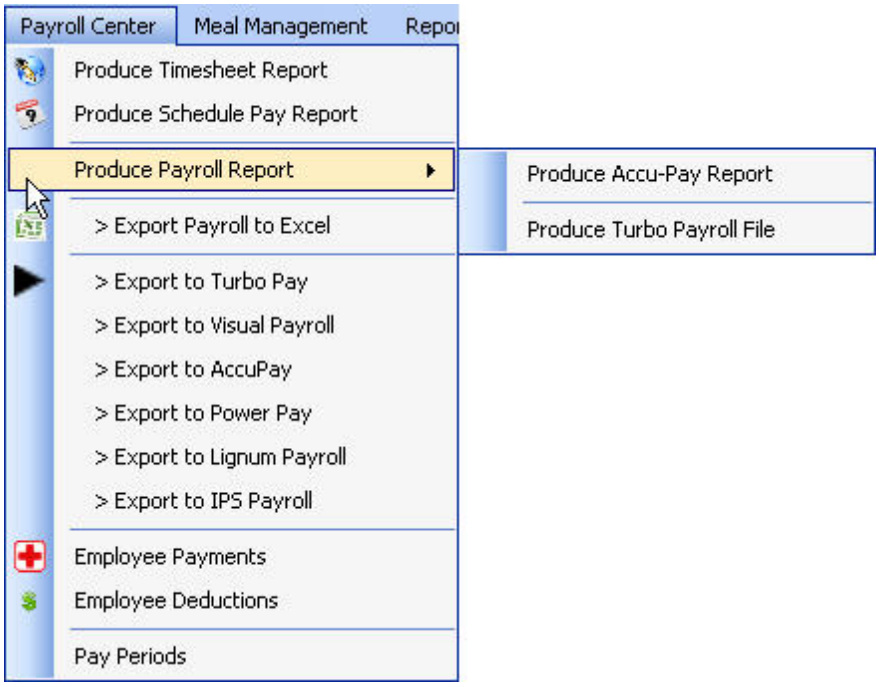
4.6.1 Produce Timesheet Report



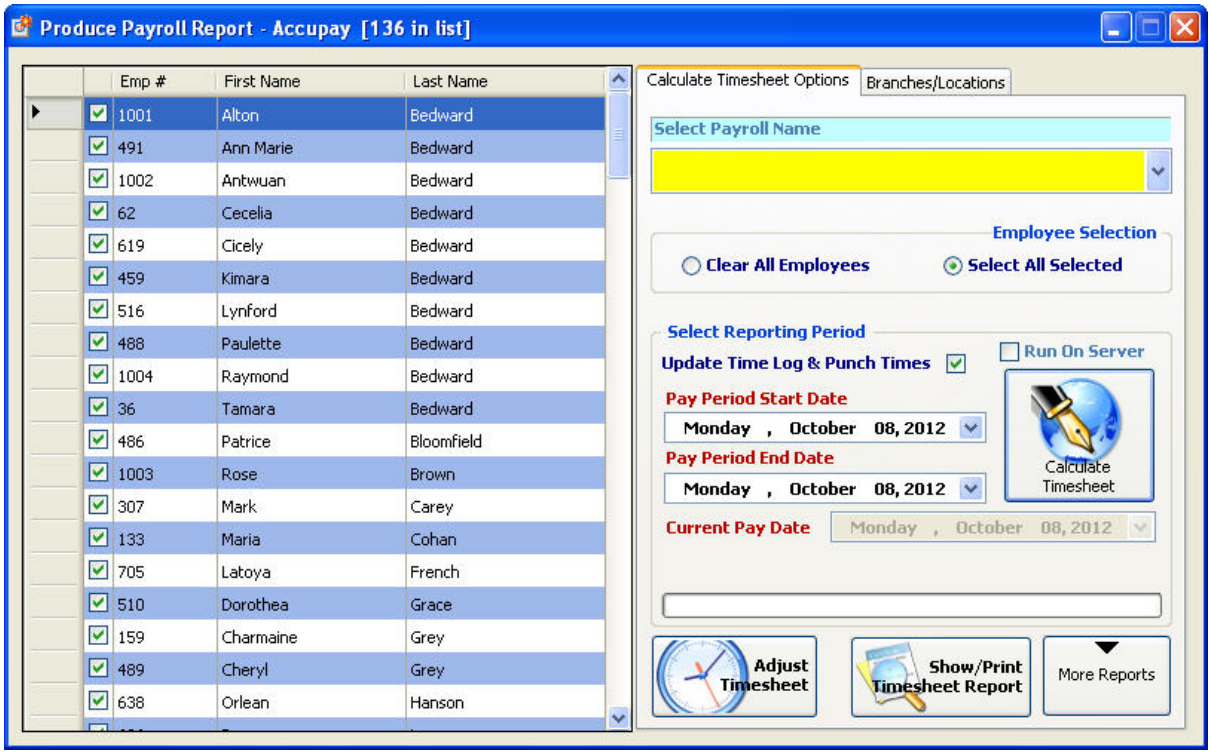
4.6.2 Produce Schedule Pay Report



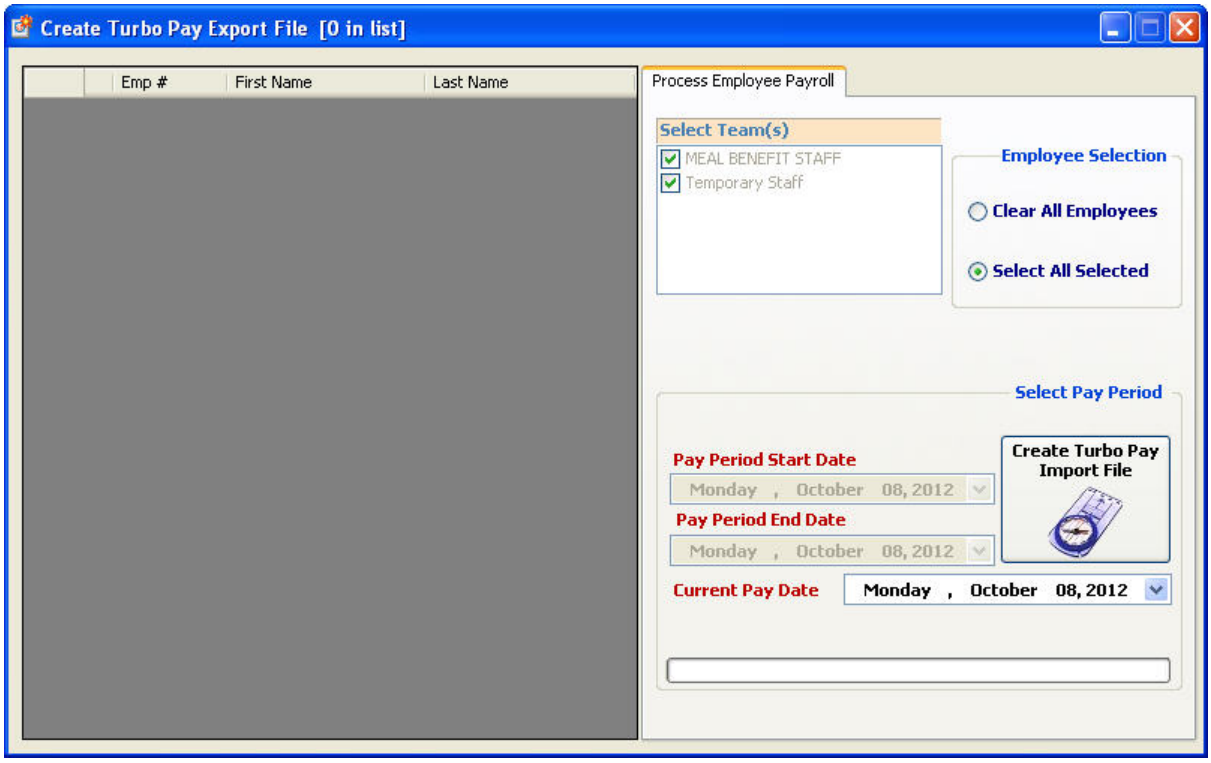
4.6.3 Produce Payroll Report



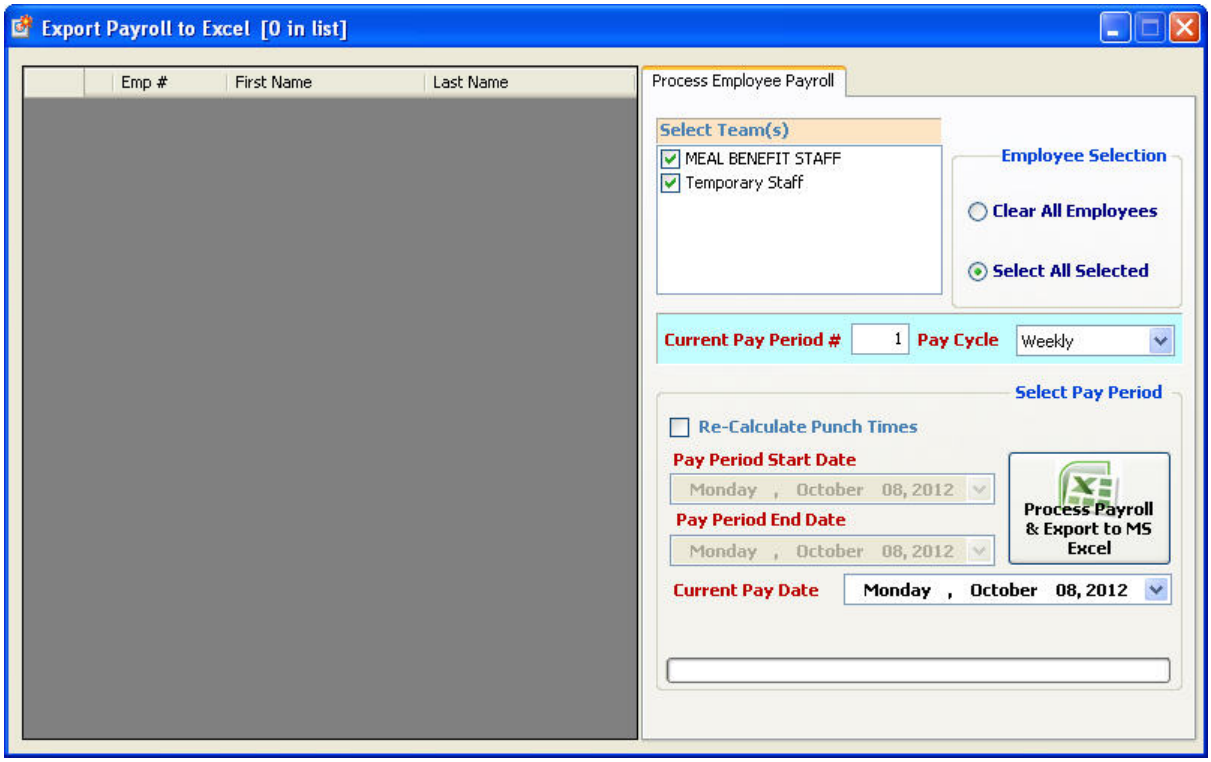
4.6.3.1 Produce AccuPay Report



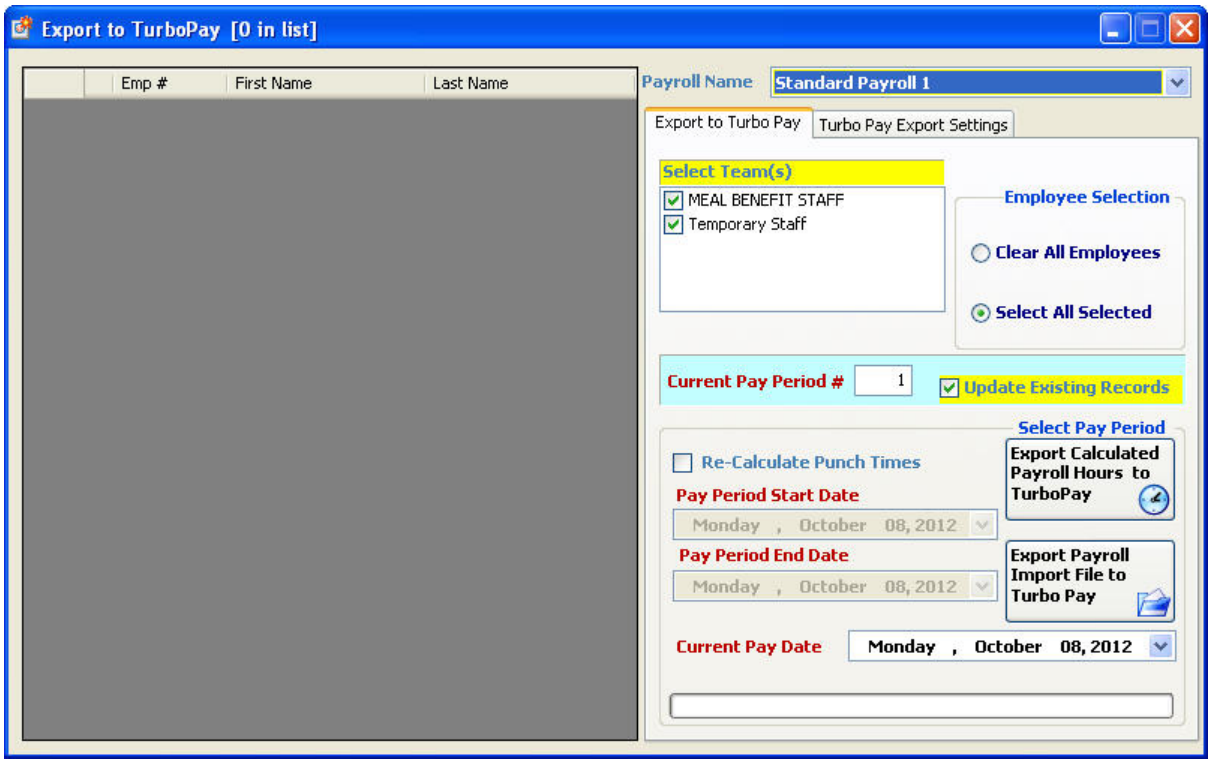
4.6.3.2 Produce Turbo Pay Report



4.6.4 Export to Payroll to Excel



4.6.5 Export to Turbo Pay



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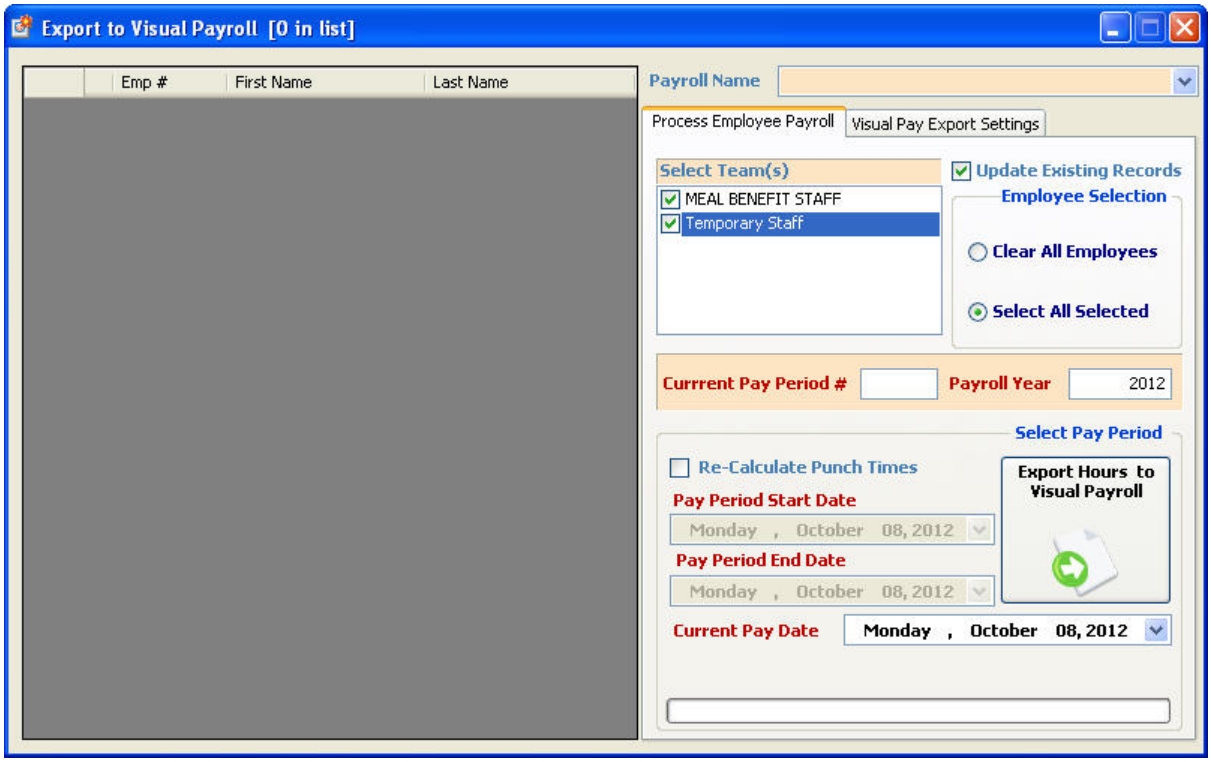
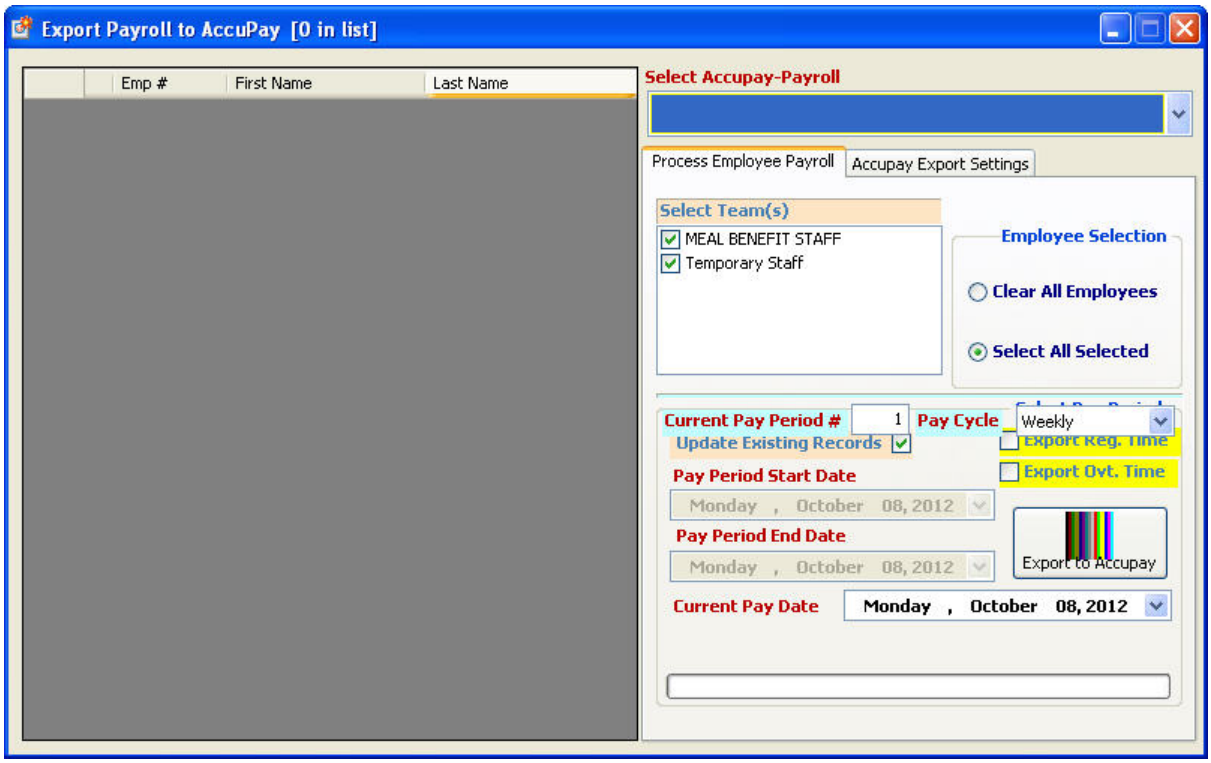
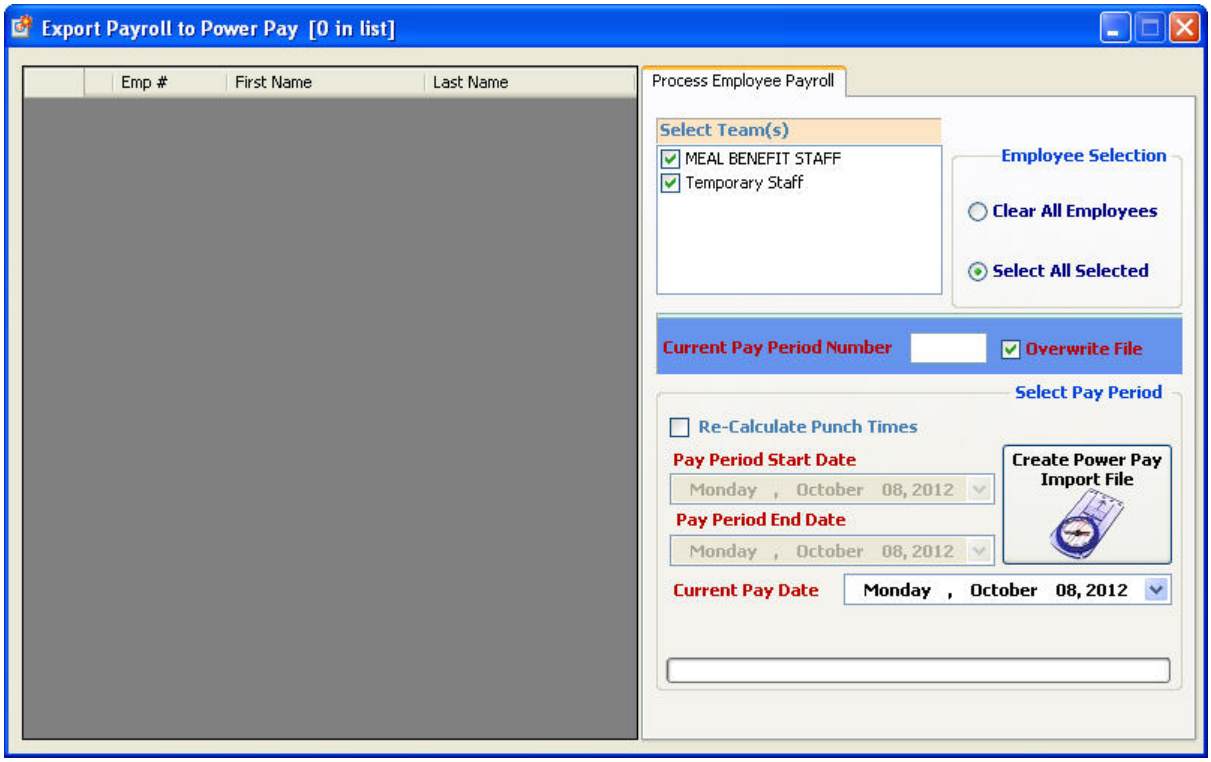
4.6.6 Export to Visual Payroll



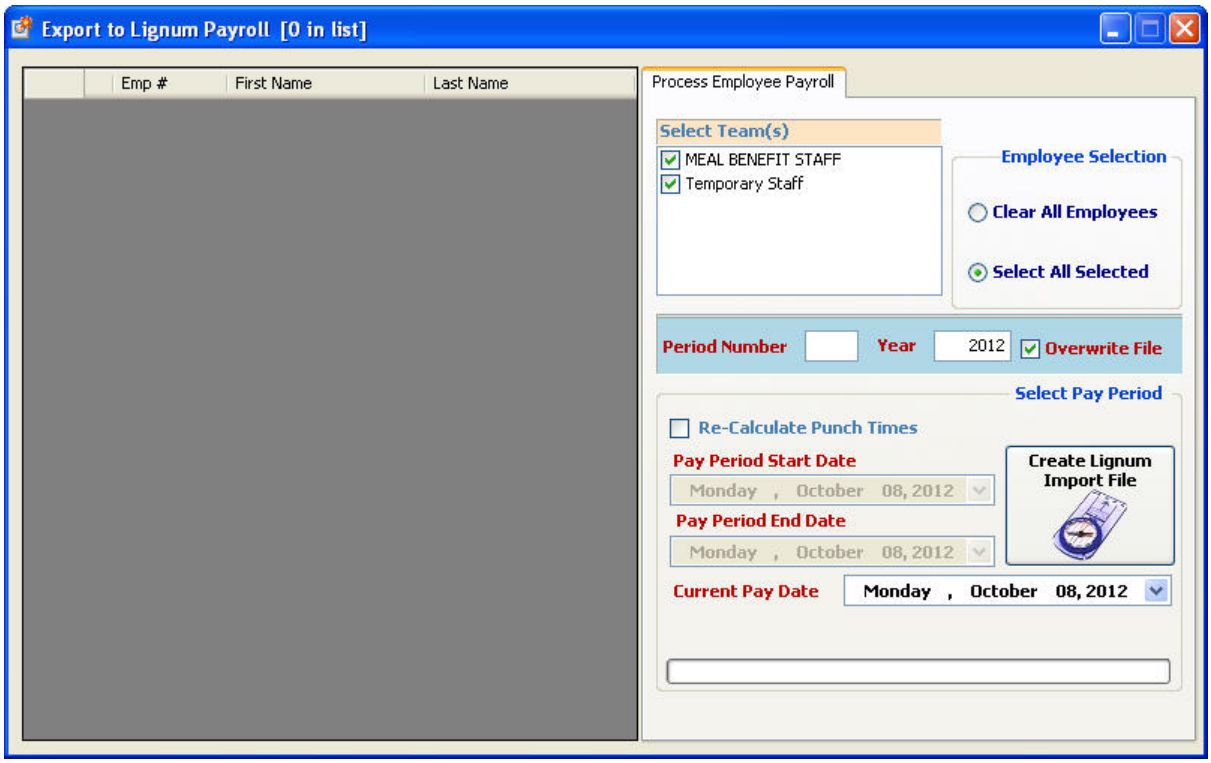
4.6.7 Export to Accupay



4.6.8 Export to Powerpay



4.6.9 Export to Lignum Payroll



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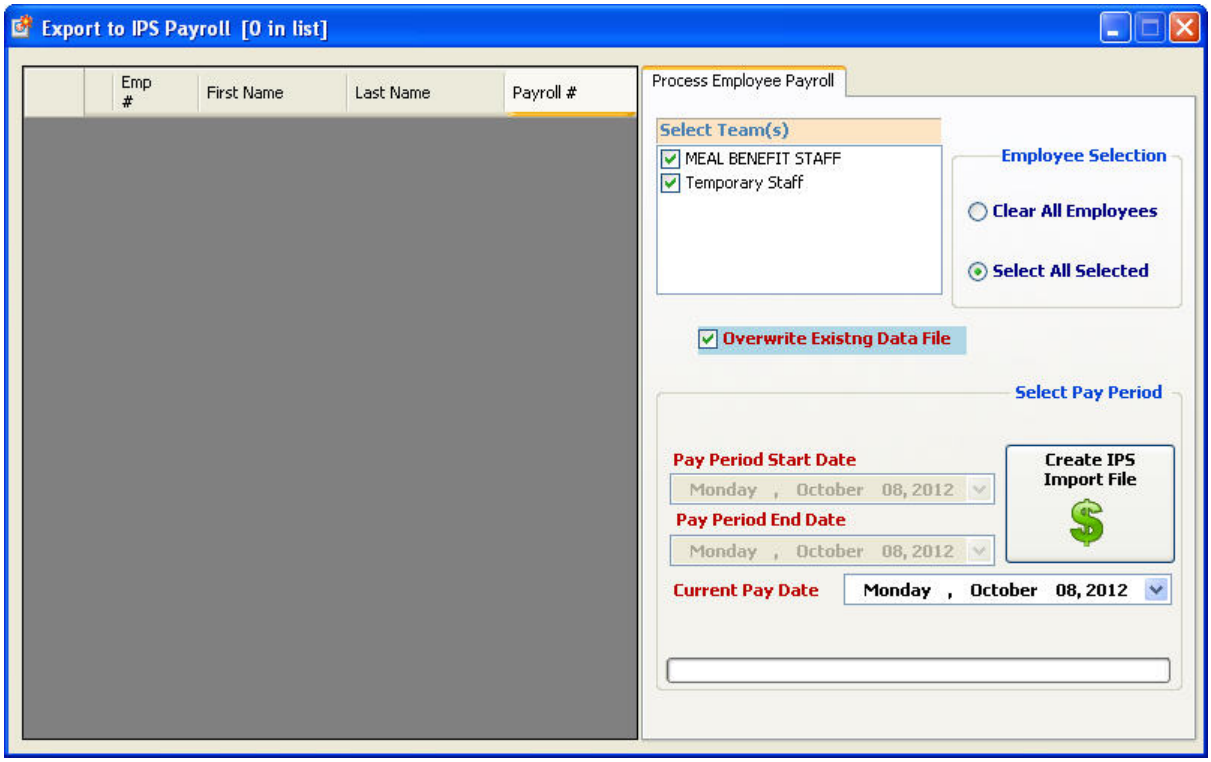
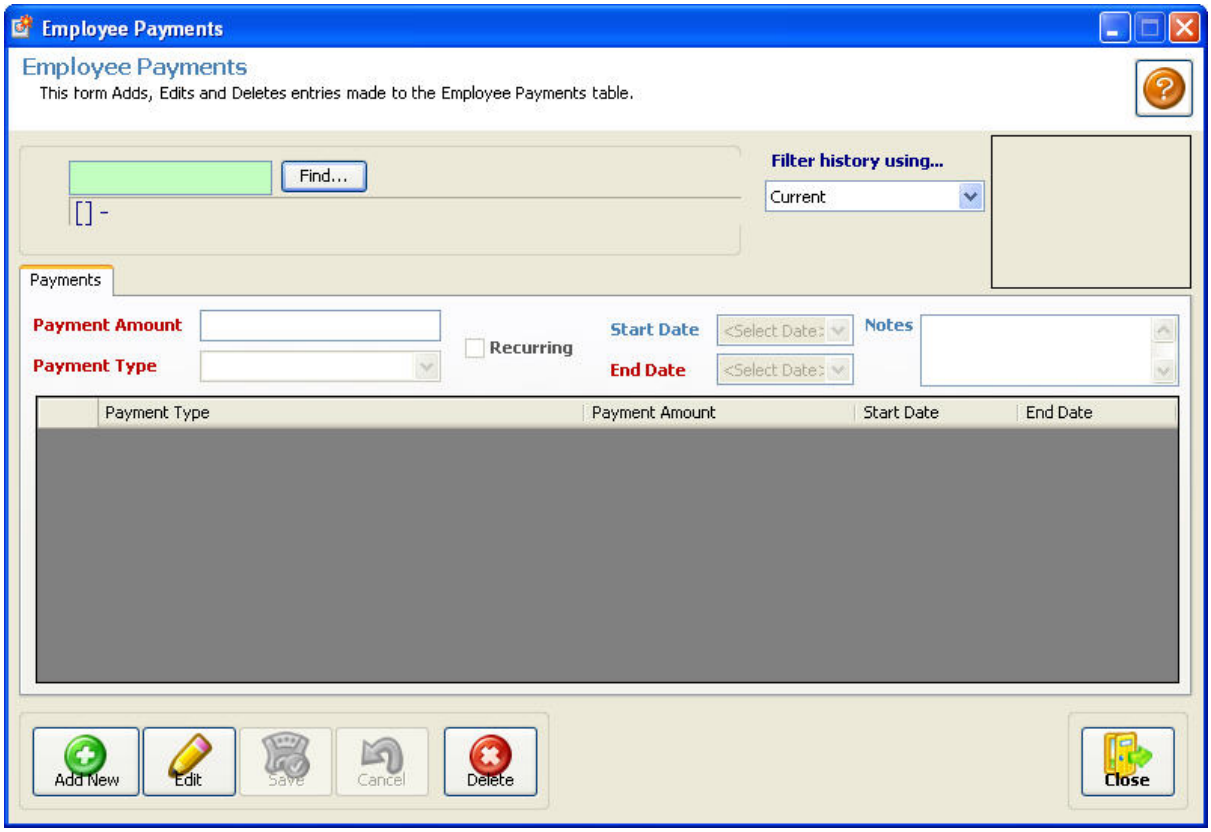
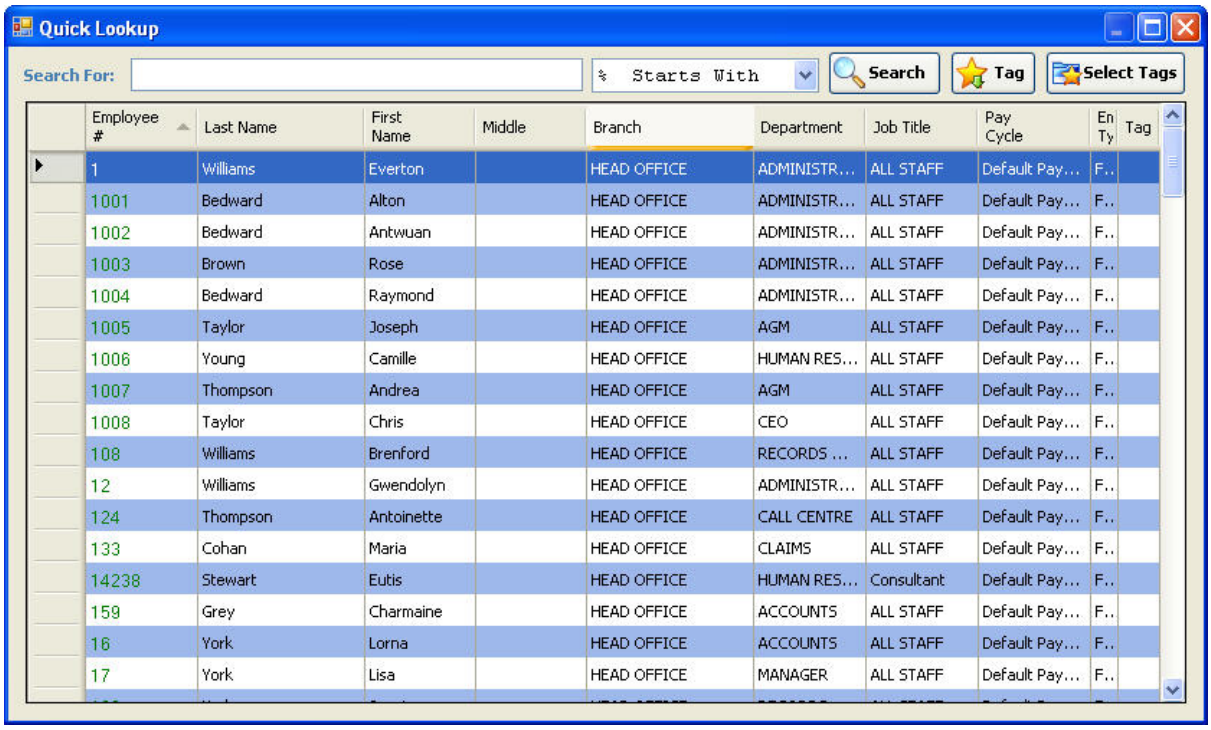
4.6.10 Export to IPS Payroll



4.6.11 Employee Payments





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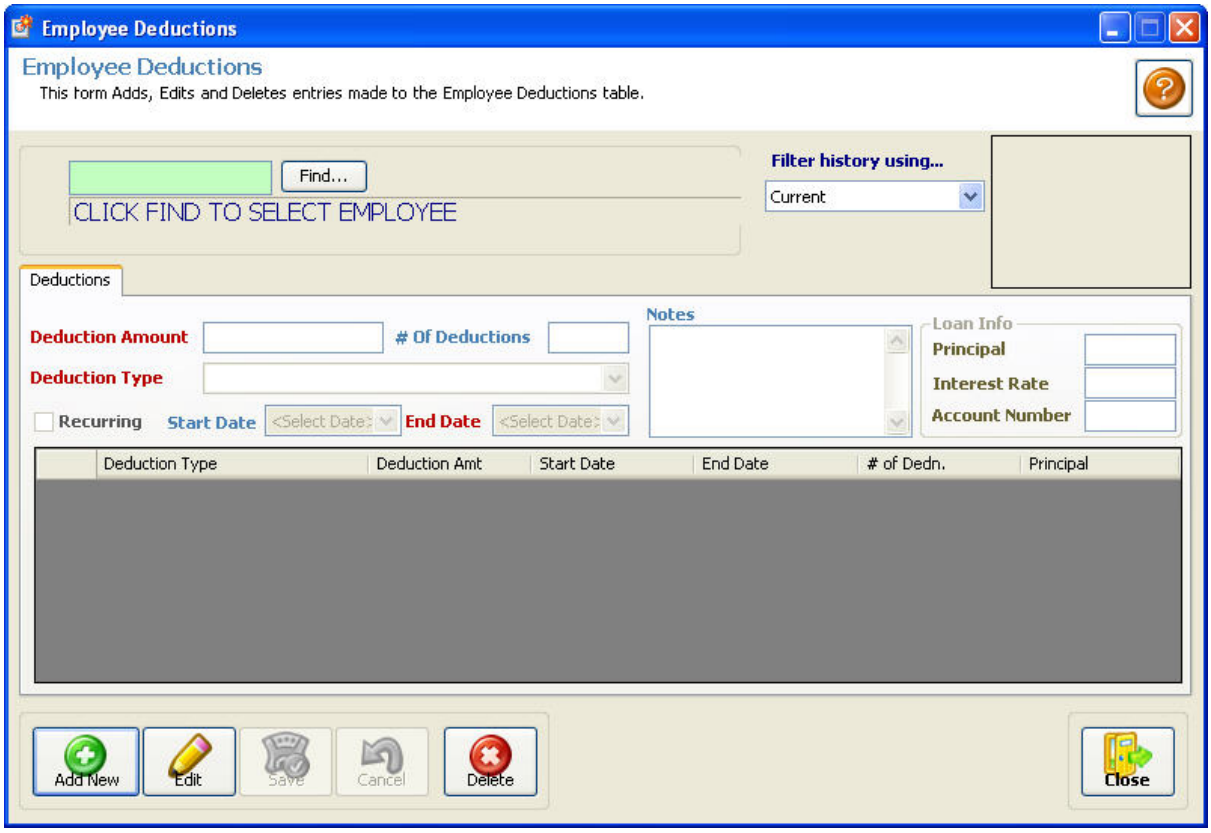
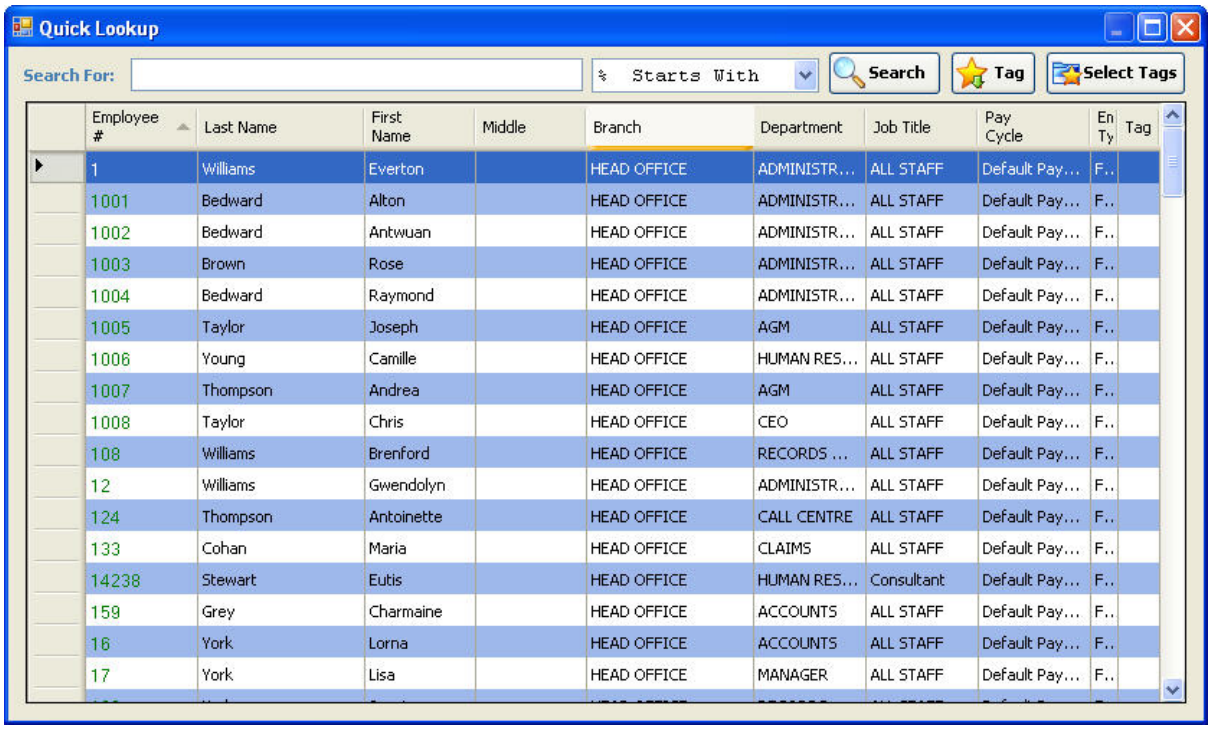
See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.6.12 Employee Deductions





Employee #	Last Name	First Name	Middle	Branch	Department	Job Title	Pay Cycle	En Ty	Tag
1	Williams	Everton		HEAD OFFICE	ADMINISTR...	ALL STAFF	Default Pay...	F..	
1001	Bedward	Alton		HEAD OFFICE	ADMINISTR...	ALL STAFF	Default Pay...	F..	
1002	Bedward	Antwuan		HEAD OFFICE	ADMINISTR...	ALL STAFF	Default Pay...	F..	
1003	Brown	Rose		HEAD OFFICE	ADMINISTR...	ALL STAFF	Default Pay...	F..	
1004	Bedward	Raymond		HEAD OFFICE	ADMINISTR...	ALL STAFF	Default Pay...	F..	
1005	Taylor	Joseph		HEAD OFFICE	AGM	ALL STAFF	Default Pay...	F..	
1006	Young	Camille		HEAD OFFICE	HUMAN RES...	ALL STAFF	Default Pay...	F..	
1007	Thompson	Andrea		HEAD OFFICE	AGM	ALL STAFF	Default Pay...	F..	
1008	Taylor	Chris		HEAD OFFICE	CEO	ALL STAFF	Default Pay...	F..	
108	Williams	Brenford		HEAD OFFICE	RECORDS ...	ALL STAFF	Default Pay...	F..	
12	Williams	Gwendolyn		HEAD OFFICE	ADMINISTR...	ALL STAFF	Default Pay...	F..	
124	Thompson	Antoinette		HEAD OFFICE	CALL CENTRE	ALL STAFF	Default Pay...	F..	
133	Cohan	Maria		HEAD OFFICE	CLAIMS	ALL STAFF	Default Pay...	F..	
14238	Stewart	Eutis		HEAD OFFICE	HUMAN RES...	Consultant	Default Pay...	F..	
159	Grey	Charmaine		HEAD OFFICE	ACCOUNTS	ALL STAFF	Default Pay...	F..	
16	York	Lorna		HEAD OFFICE	ACCOUNTS	ALL STAFF	Default Pay...	F..	
17	York	Lisa		HEAD OFFICE	MANAGER	ALL STAFF	Default Pay...	F..	

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

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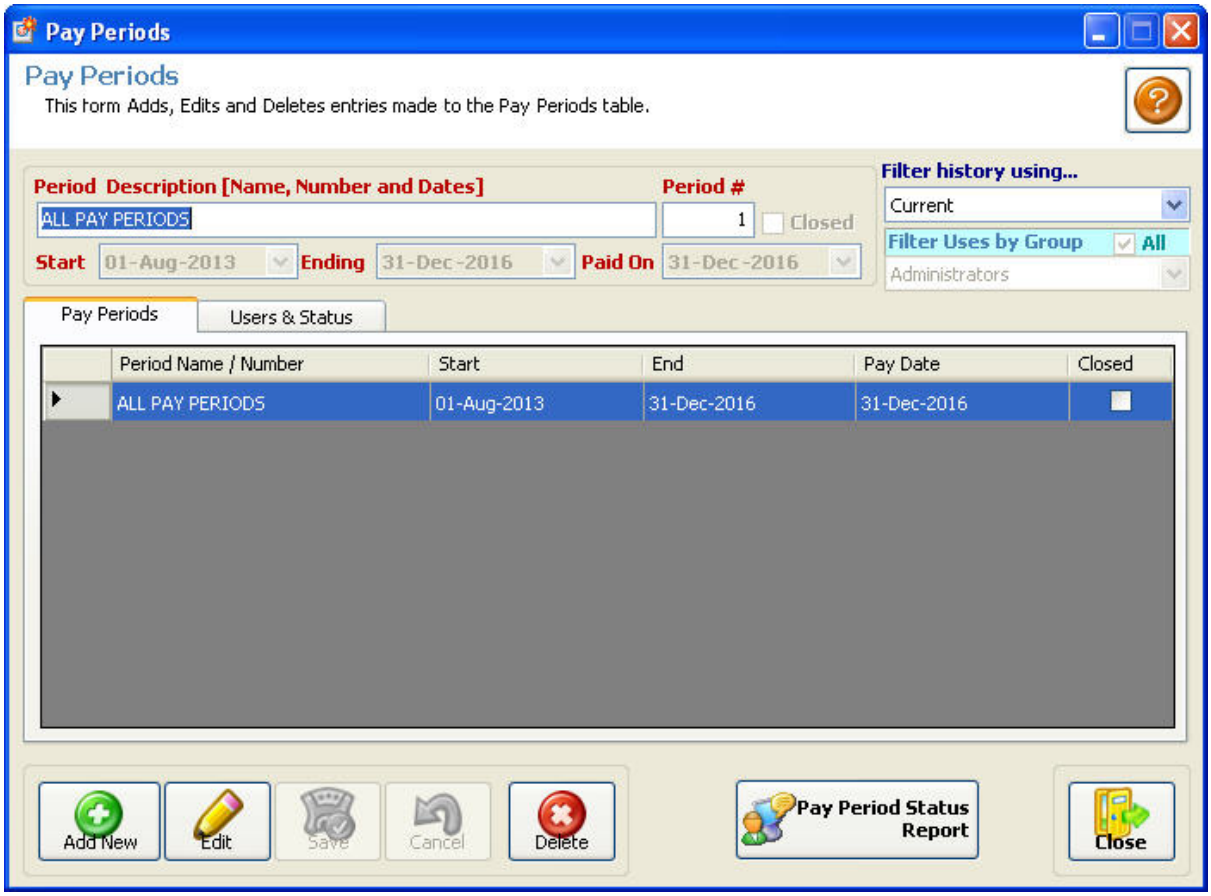
4.6.13 Pay Periods



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.7 Meal Management Menu

The **Meal Management** module of the SMART ScheduleMaster software allows for a meal benefit to be issued to the employees. As the employees make a charge to their account, the meal the benefit amount is reduced by the cost of the items purchased.

The meal benefit can be replenished at specified intervals manually or automatically by the system. Also, when replenished existing amounts can be accumulated or replaced with the new amount.

The module also works with an open canteen system which allows just the tracking of the number of meals taken and not necessarily the value of the meal.

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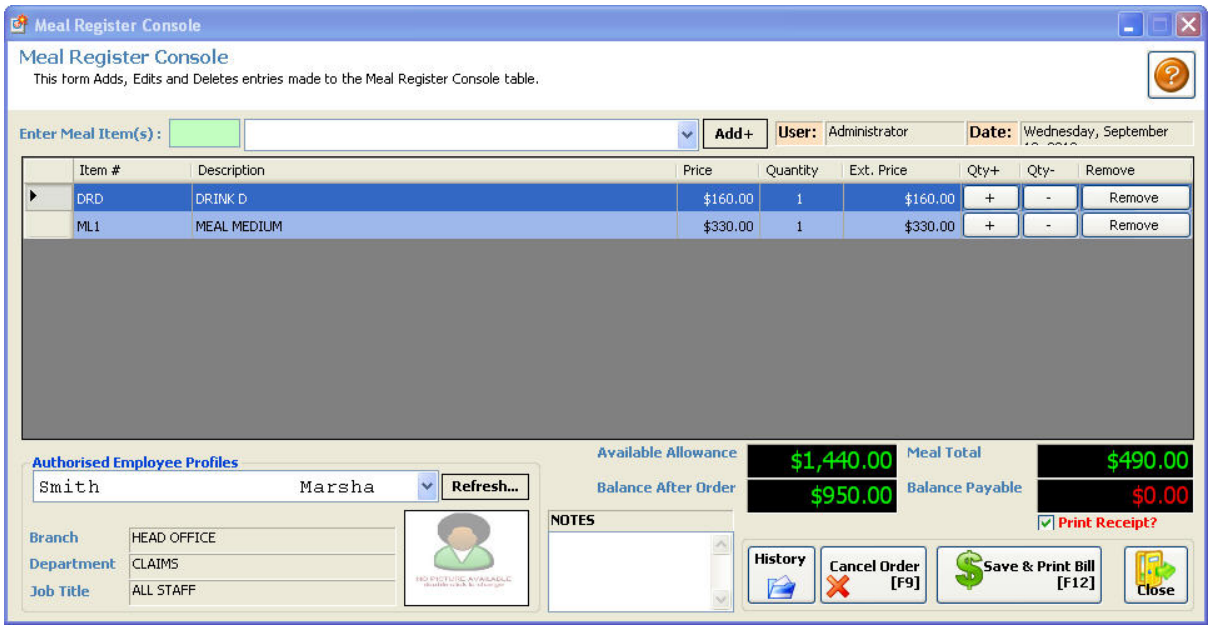
4.7.1 Meal Register Console

MEAL MANAGEMENT ***MEAL BILL REGISTER***

This screen bills staff for meals and deduct meal value from their allowance balance. Where the allowance balance is depleted, employees may pay cash for meal charges.



<u>To do a bill:</u>

1. First, employees need to scan their finger or card at the biometric unit for their name to appear in the "**Authorized Employee Profiles**" list.

2. Find and add one or more items the list of items using the drop down description list or entering the item SKU. Adjust quantities as needed.

3. Select the employee. Immediately the allowance balance will show in the boxes.

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Note:

a. Available Allowance: *Balance available before the transaction is complete*

b. Balance After Order: *New Allowance Balance after this order has been processed*

c. Meal Total: *Order total of items to be charged*

d. Balance Payable: *Cash payable by employee if the allowance balance is insufficient to cover order total*

3. Save & Print Bill to complete order. Cancel Order if transaction needs to be aborted.

Related or Missing Fields Information:

To add an item to the Meal Register Console Click Here! and Refresh

REFRESH BUTTON

The refresh button is used to display the names of employees who have scanned in but the names are not showing up in the list right away.

MEAL CHARGE HISTORY: Click here to learn about the Meal Charge History log

4.7.1.1 Billing History

MEAL CHARGE HISTORY

The meal charge history shows all transactions completed within the select date filter period. the user may see a show of the history of all past transactions. Using dates to filter transaction list. Select a receipt from the list to re-print, view order or void the transaction (Voided transactions cannot be undone!).

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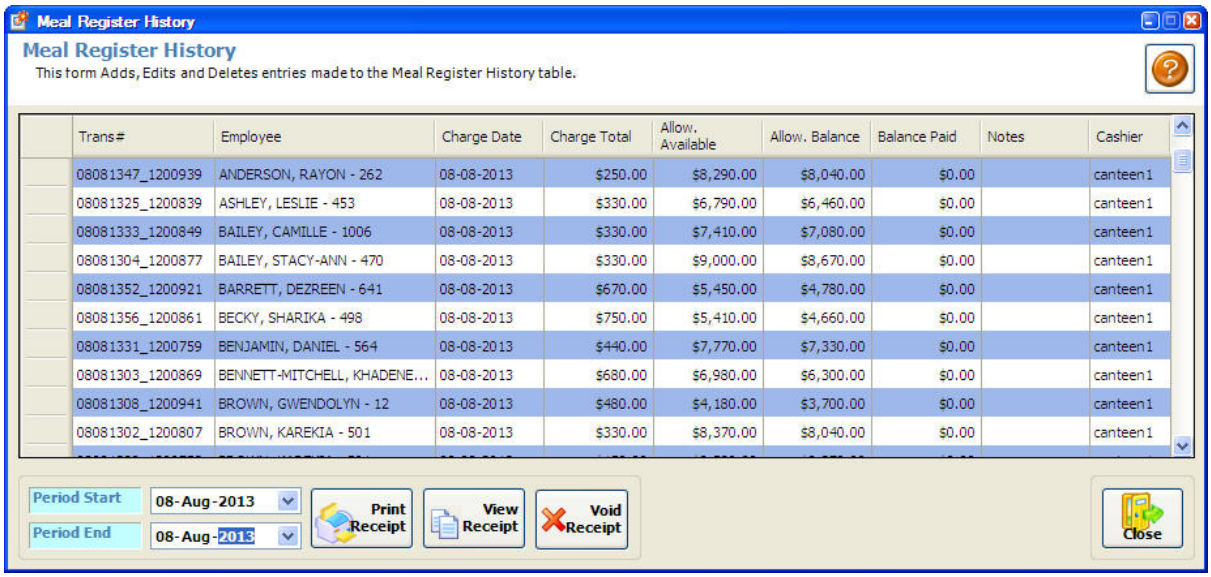


Start & End Filter: Set the start and end date period for which you want to view past transactions.

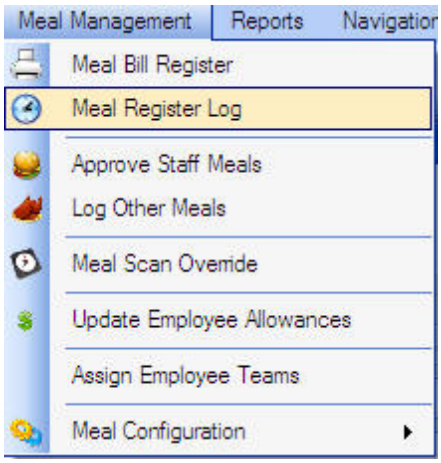
Print Receipt: This utility will reprint the highlighted receipt on the screen.

View Receipt: Shows a print preview of the highlighted receipt on the screen.

Void Receipt: Voiding the highlighted receipt on the screen will reimburse the employee for the charge total.

4.7.2 Meal Register Log

MEAL MANAGEMENT ***MEAL REGISTER LOG***



The meal register log is used as a checklist for the server/cashier to check off all employees who have scanned in and been served. This log is primarily for tracking the

number of meals when the value of the meal is not significant to the company.

REFRESH EMPLOYEE SCAN LIST BUTTON

The refresh button is used to display the names of employees who have scanned in but the names are not showing up in the list right away,

CONFIRM SERVING CHECKBOX

Before each employee is marked as served, the system will ask that you confirm (yes or no) that the selected employee was actually served to avoid mistakes. Unchecking this option will mark the employees as served once the served button beside the employee name is click.

SERVED DATE

The system by default will display the current date and all employees to be served. To view a previous date, double the click the date and the option will appear.

SORT OPTIONS

The sort options will reorder the employee list by the name or time.

4.7.3 Approve Staff Meals

MEAL MANAGEMENT ***APPROVE STAFF MEALS***

This screen is an open canteen feature and logs information that allows staff to scan for meals outside their regularly allowed time in cases such as overtime or extended production. Once the entry is made on this screen the biometric device will access this data and allow the staff who are apart of the assigned teams to scan for meals.

The default configuration for meal allowances for breakfast, lunch or supper is done at Meal Rules Setup.

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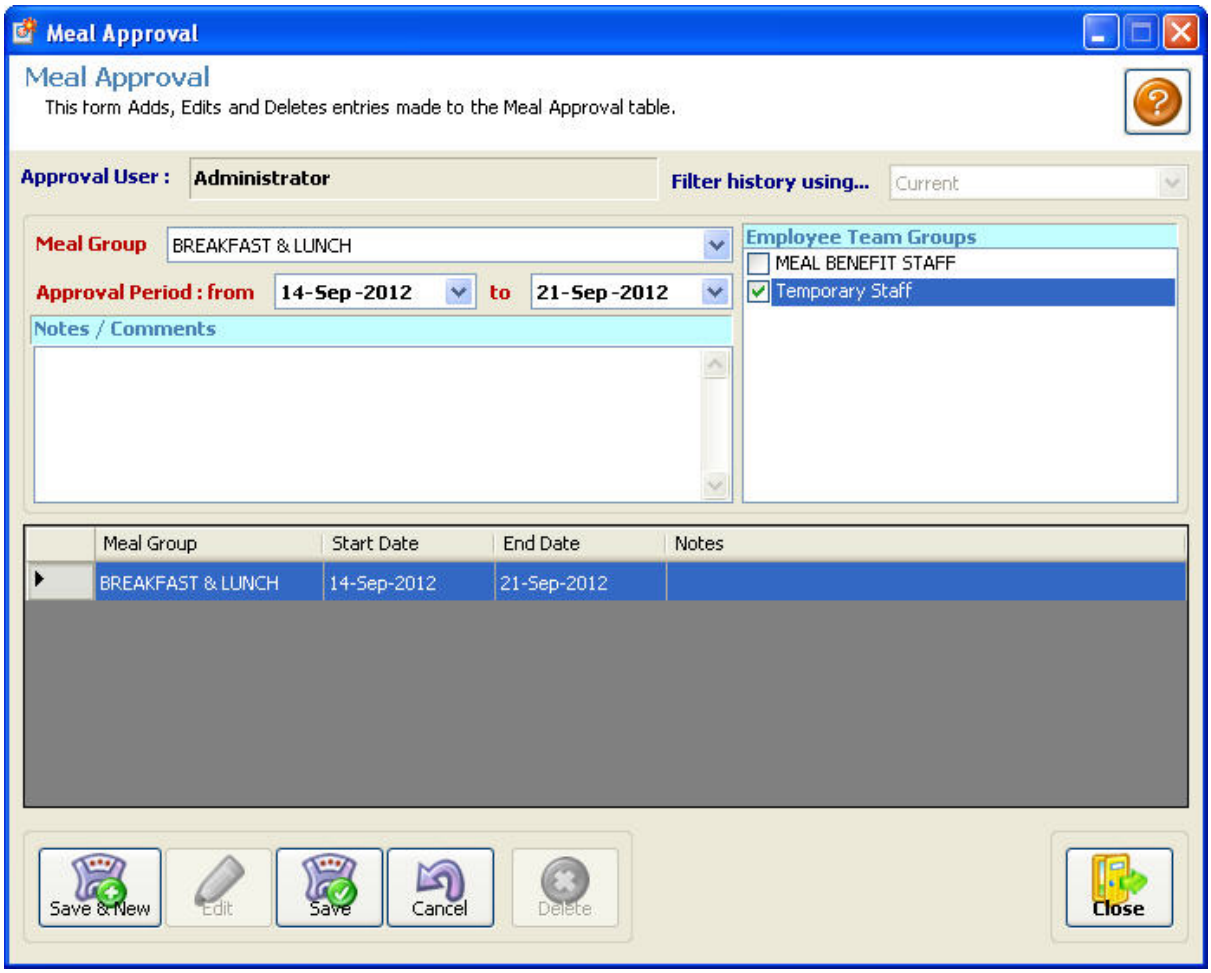


See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

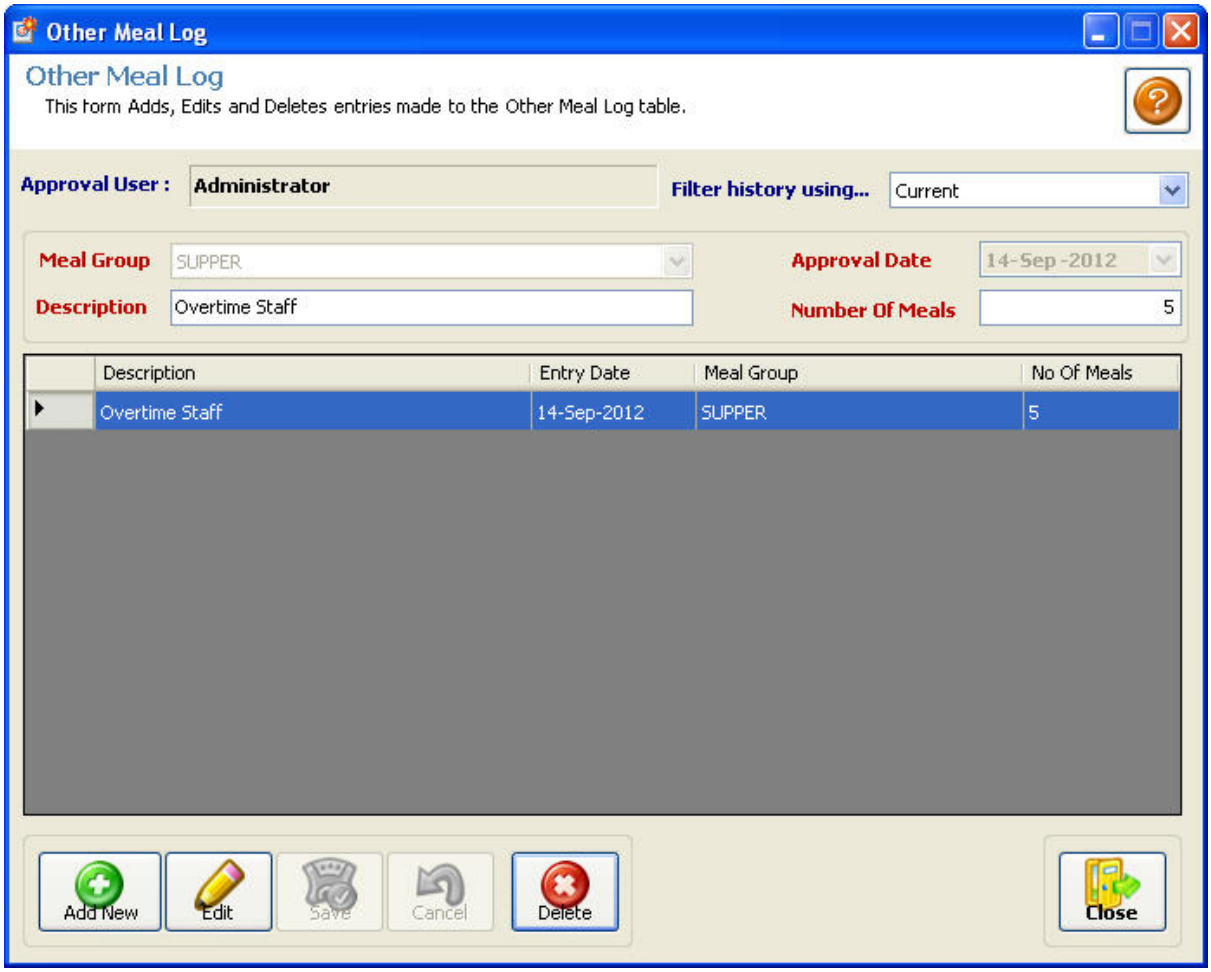
<u>Related or Missing Field Information:</u>

To add a meal group click here! and Refresh

4.7.4 Log Other Meals

MEAL MANAGEMENT ***LOG OTHER MEALS***

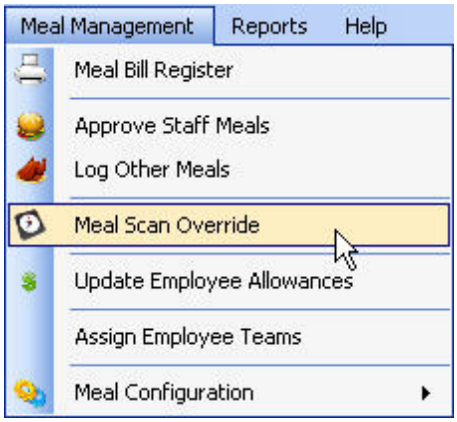
This screen is used to record meals issued to visitors or other person not on the meal management system. This feature is used primarily when there is an open canteen system and no meal allowance is issued but rather just the tracking of the number of meals served.



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.7.5 Meal Scan Override

MEAL MANAGEMENT ***MEAL SCAN OVERRIDE***



The meal scan override feature is by an Administrator used to scan in employees or remove previous scans or overrides. This is required where the biometric device or network is not operational for scans to be registered normally.

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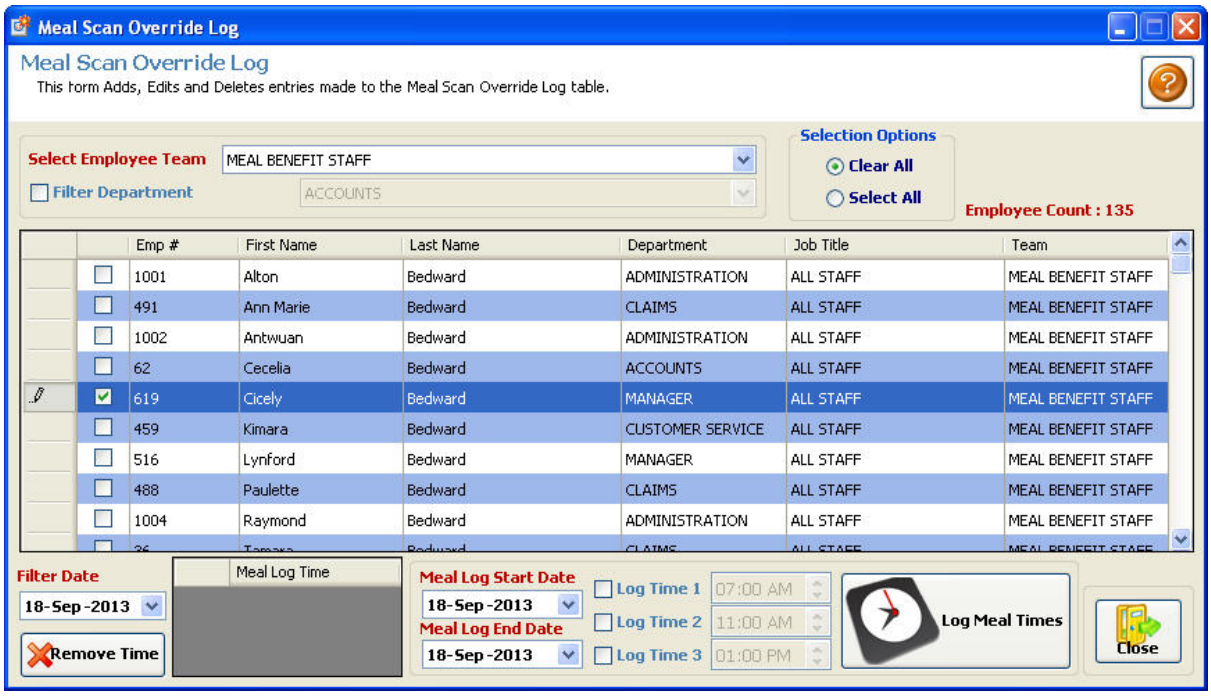


TO SCAN IN ONE OR MORE EMPLOYEES

Filter Date

The filter date is used to show scans for the selected employee on the filter date selected.

Remove Time Button

Where there are times in the Meal Log Time list. The remove button will delete the highlighted time.

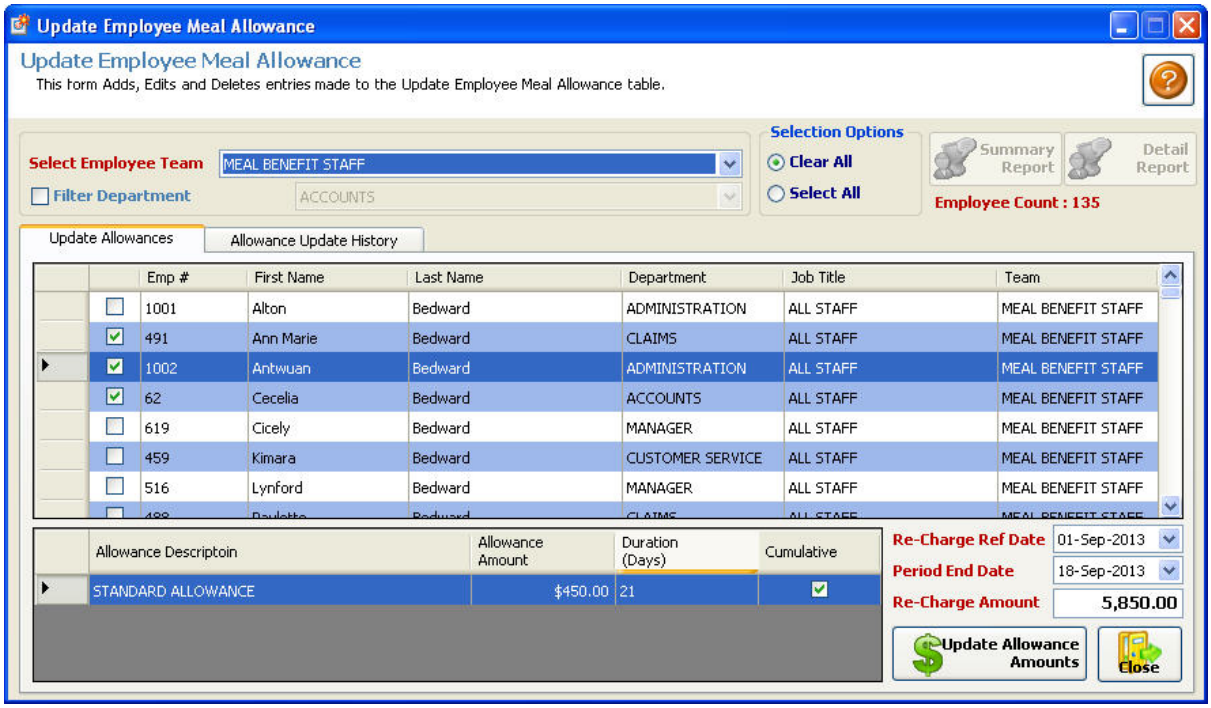
Log Meal Time

When the log meal times button is pressed, the system will create an entry for log times 1 to 3 (where checked) for the period set for the log start and end date periods. Although the log times are set to a default, they can be changed to a desired time.

4.7.6 Update Employee Meal Allowance

MEAL MANAGEMENT ***UPDATE EMPLOYEE ALLOWANCES***

This screen assigns the meal allowance benefit to one or more employees according to the initial allowance setup. Meal Allowance amounts are defined and assigned to groups of staff members by their Work Team.



To apply allowance benefit:

1. Select the Team to filter employees by Work Team. To filter further by department, check the Filter Department option.

2. Select the Allowance benefit from the list. For daily allowance amounts, set the start and end dates for the period desired. The system will then calculate the number of days (days * amount) for the period excluding or including Holidays and Weekends where required. For assign full monthly fixed allowance benefits amount upfront, set the start and end date to be the same such as the beginning or end of the month.

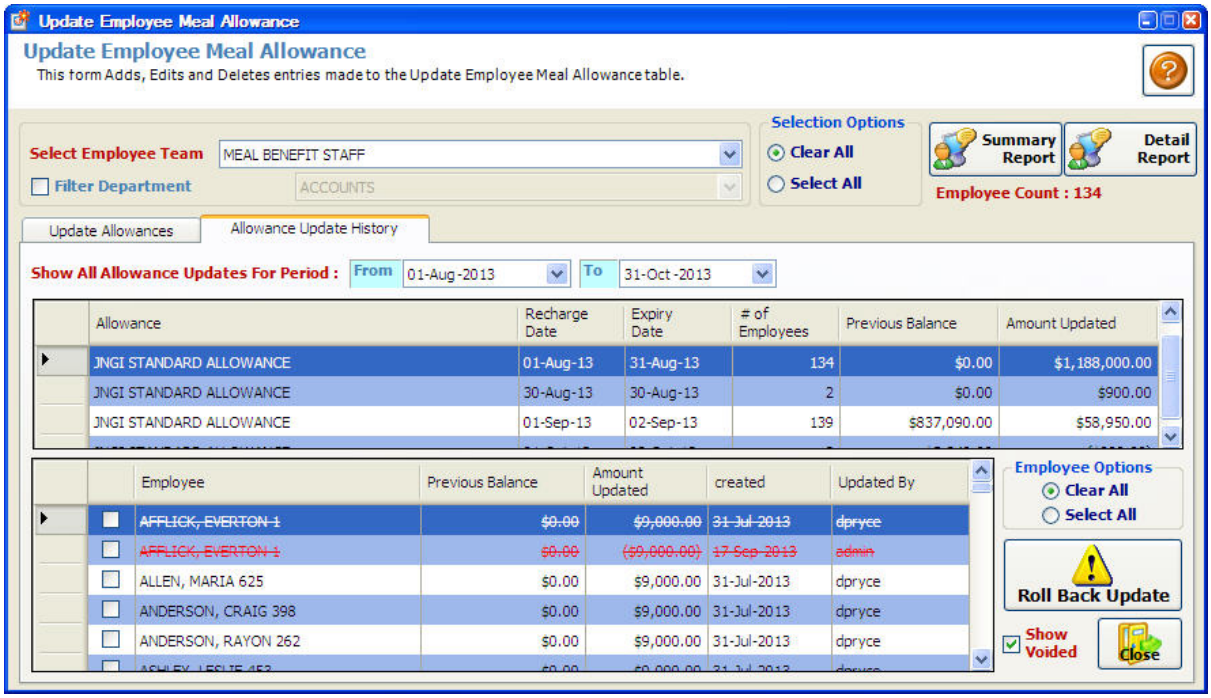
3. Press the Update Allowance Amounts button and confirm to continue with the update. Where the allowance is an accumulative one, the new amount will be added to each employee's balance; otherwise it will be replaced with the new benefit amount.

Note: Click here to see the Allowance Update History

4.7.6.1 Allowance Update History

MEAL MANAGEMENT ***UPDATE EMPLOYEE ALLOWANCES HISTORY***

The history tab of the allowance update screen shows all past allowance updates done. There are also two report buttons, one shows a summary report for all updates done within the filter period selected and a detail report which shows all updates updated and any updates that were voided.



Filtering Allowance Update History

1. Select the Team to filter employees by Work Team. To filter further by department, check the Filter Department option.
2. Set the start and end date to filter all updates by that period. The summary of the updates will be shown in the first list and the detail of all employees updated in the second list. Click on each allowance update in the summary list to show the details in the list below it.

Employee Options (Clear or Select)

For the allowance summary option selected in list one, the clear or select all option will check or uncheck each employee in list two for roll back (void).

Show Voided

The show voided checkbox will filter list two to show voided (roll back) transactions as needed.

Roll Back Update

Clicking this button will void any allowance update transaction (which has not yet been voided) for employees selected in list two.

4.7.7 Assign Employee Team

MEAL MANAGEMENT ***ASSIGN EMPLOYEE TEAMS***

This Feature is a batch utility that allows easy moving of groups of employees from one work team to another instead of going to each employee's profile and editing their team assignment.

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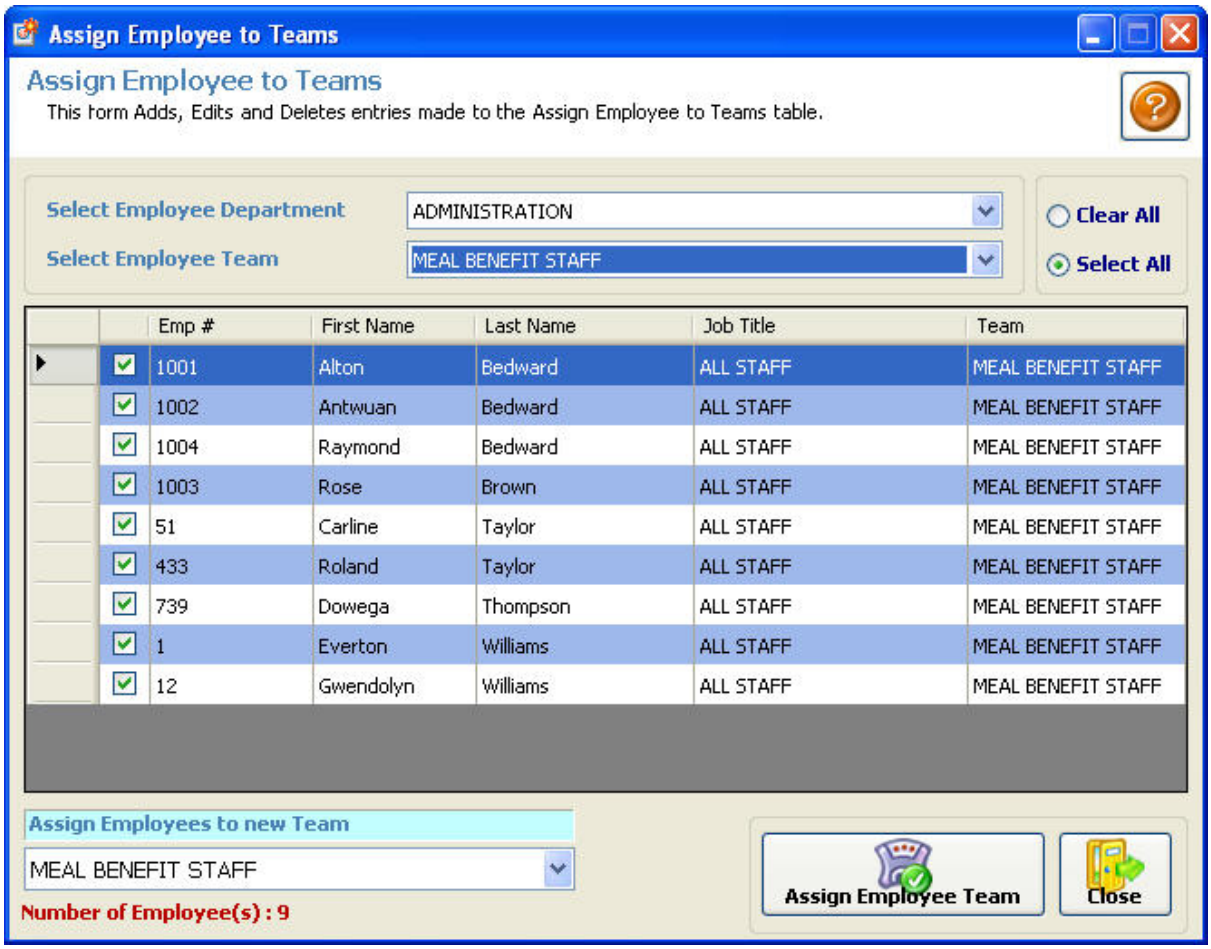

To Assign Employees to a new Work Team:

1. Use the filter options for Departments and Work Teams to find the employee(s) you want to transfer to a new Team. Ensure only employees you want to transfer are ticked in the first column.

2. Select new Work Team where is says "**Assign Employees to new Team**"

3. Press the Assign Employee Team button to move the employees.

Related or Missing Fields Information

To add a new Work Team click here and Refresh

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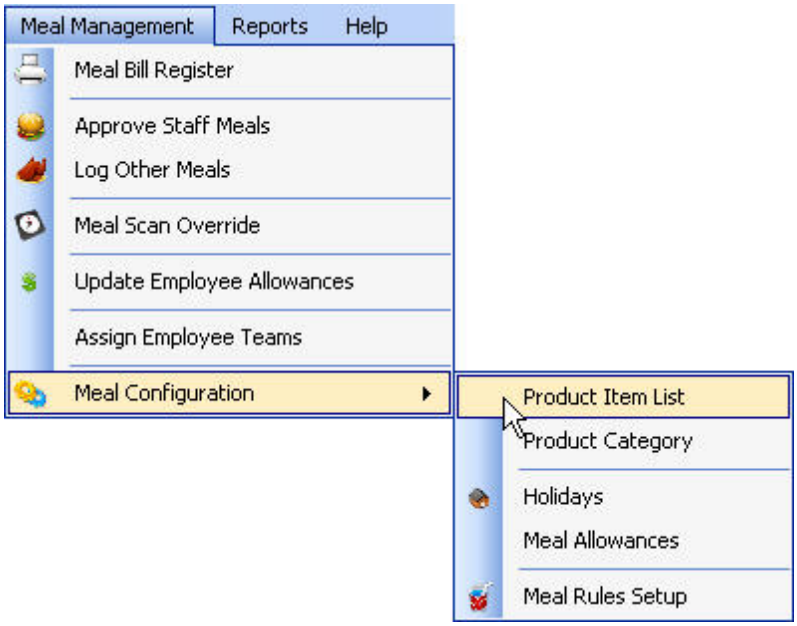
4.7.8 Meal Configuration

The Meal Configuration menu has the parameters necessary to setup the Meal Management module. Each option will be explained in detail.



4.7.8.1 Product Item List

MEAL MANAGEMENT MEAL CONFIGURATION *PRODUCT/MEAL ITEM LIST*

This screen allows you to enter your canteen's menu items and snacks. You can categorized the items into Product Categories such as Breakfast, Lunch, Snacks, Teas, Beverages etc.

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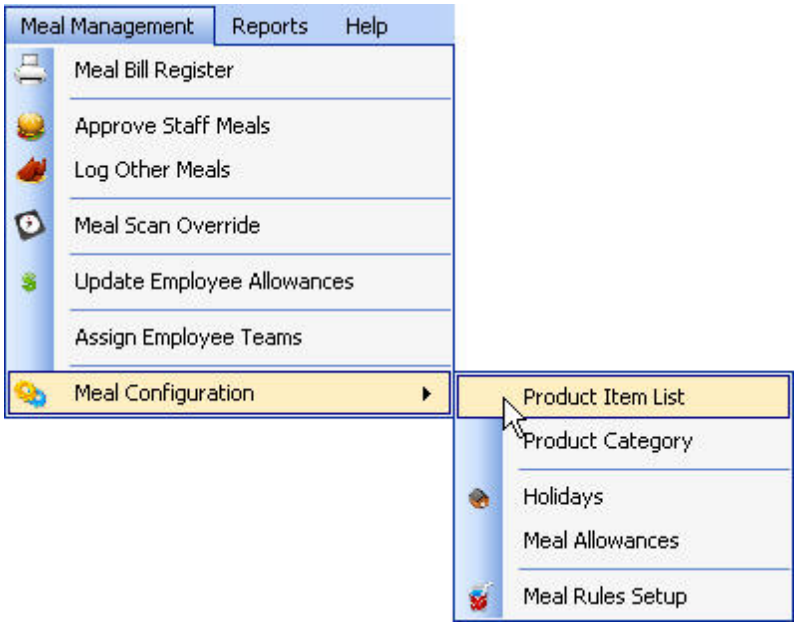
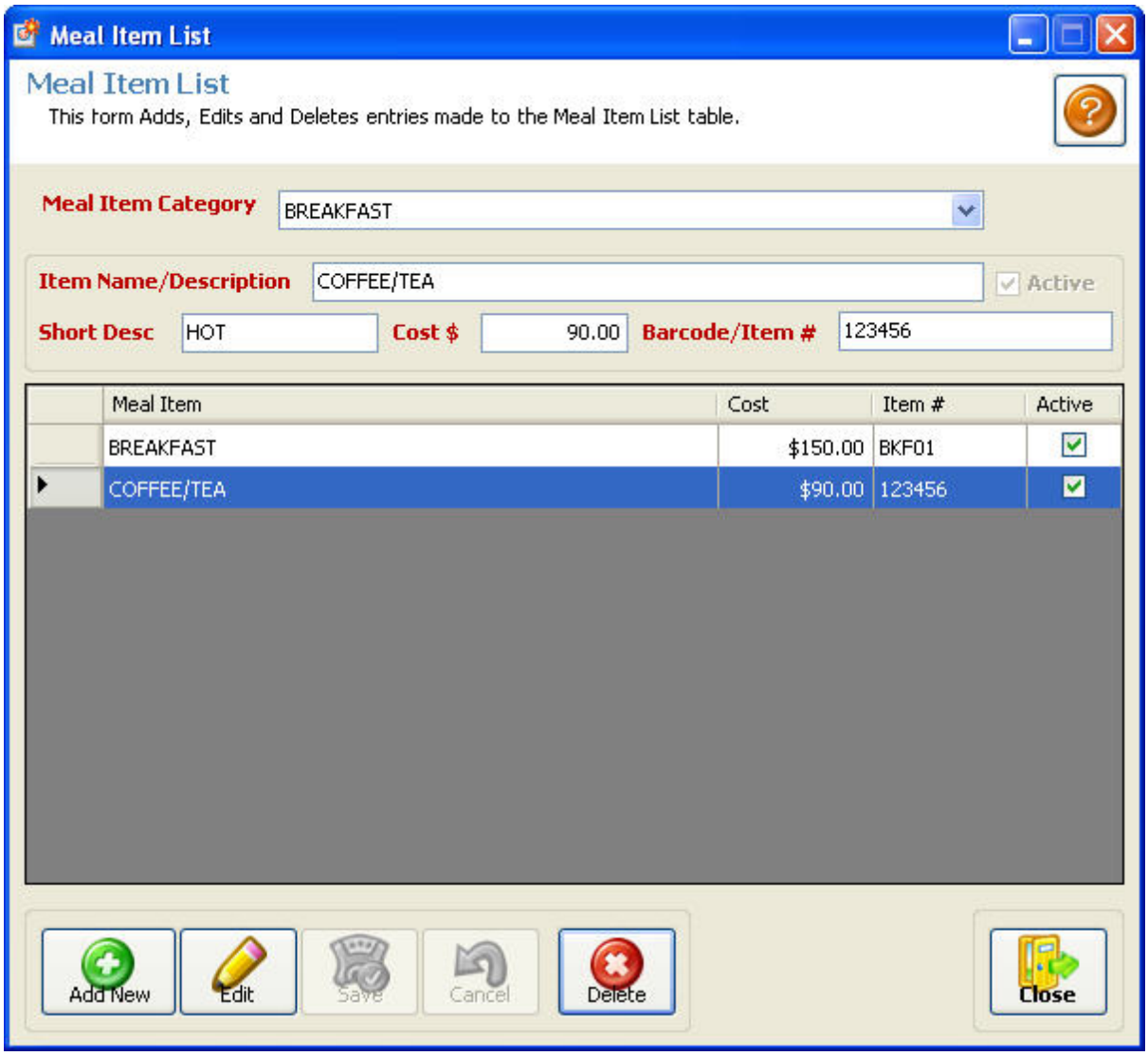


© 2014 SMART Technologies Jamaica

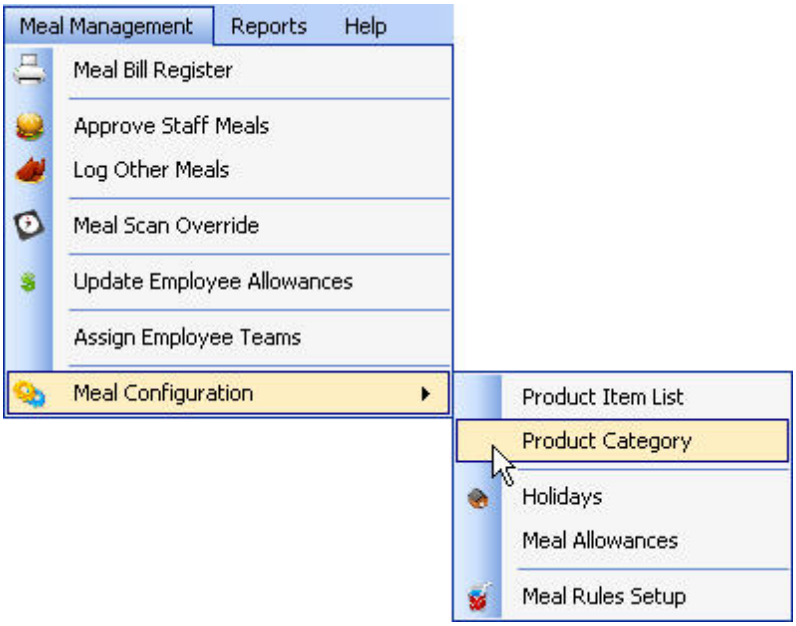


See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

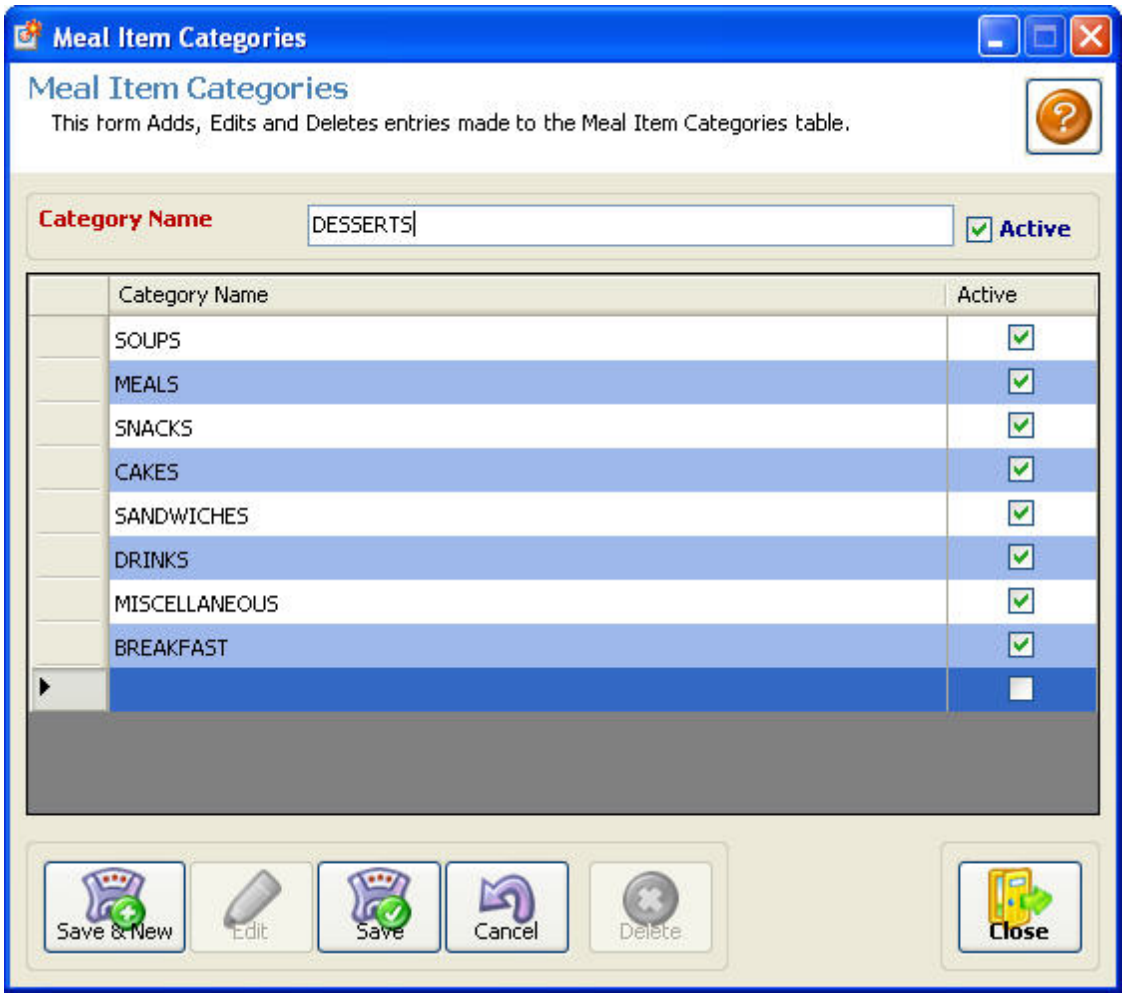
4.7.8.2 Product Category

MEAL MANAGEMENT MEAL CONFIGURATION *PRODUCT CATEGORIES (MEAL GROUPS)*

This screen allows you to categorize your menu list into groups such as Breakfast, Lunch, Snacks, Teas, Beverages etc. These groups are to be setup before the Product Item List is entered.



© 2014 SMART Technologies Jamaica



See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.7.8.3 Holidays

MEAL MANAGEMENT **MEAL CONFIGURATION** ***HOLIDAYS***

Setting up holidays will prevent employees from receiving a Meal Allowance for days designated as Holidays. Holiday setup is also used in the Time Management module; however, for Meal Management the only significant options on this screen are the Holiday date and Work Team. You can fill out the other options with default data if the Time Management module isn't being used.

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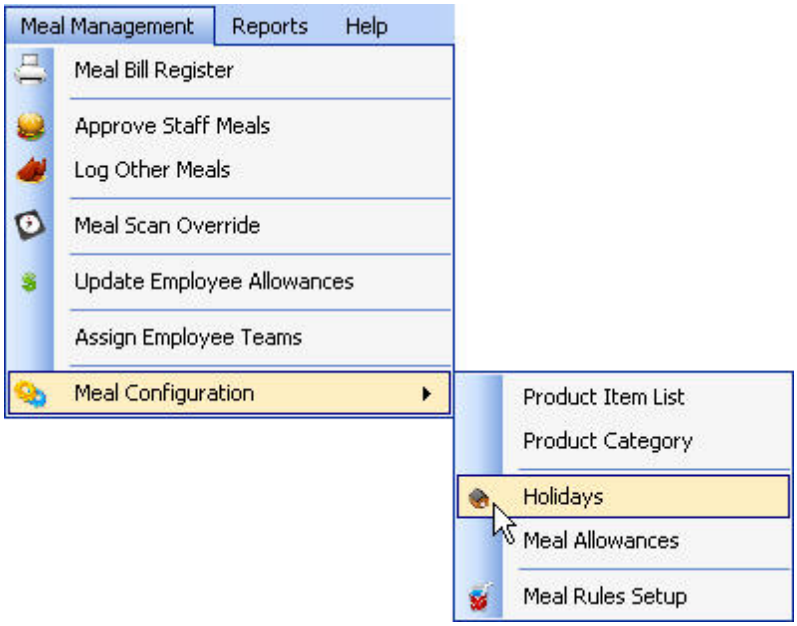

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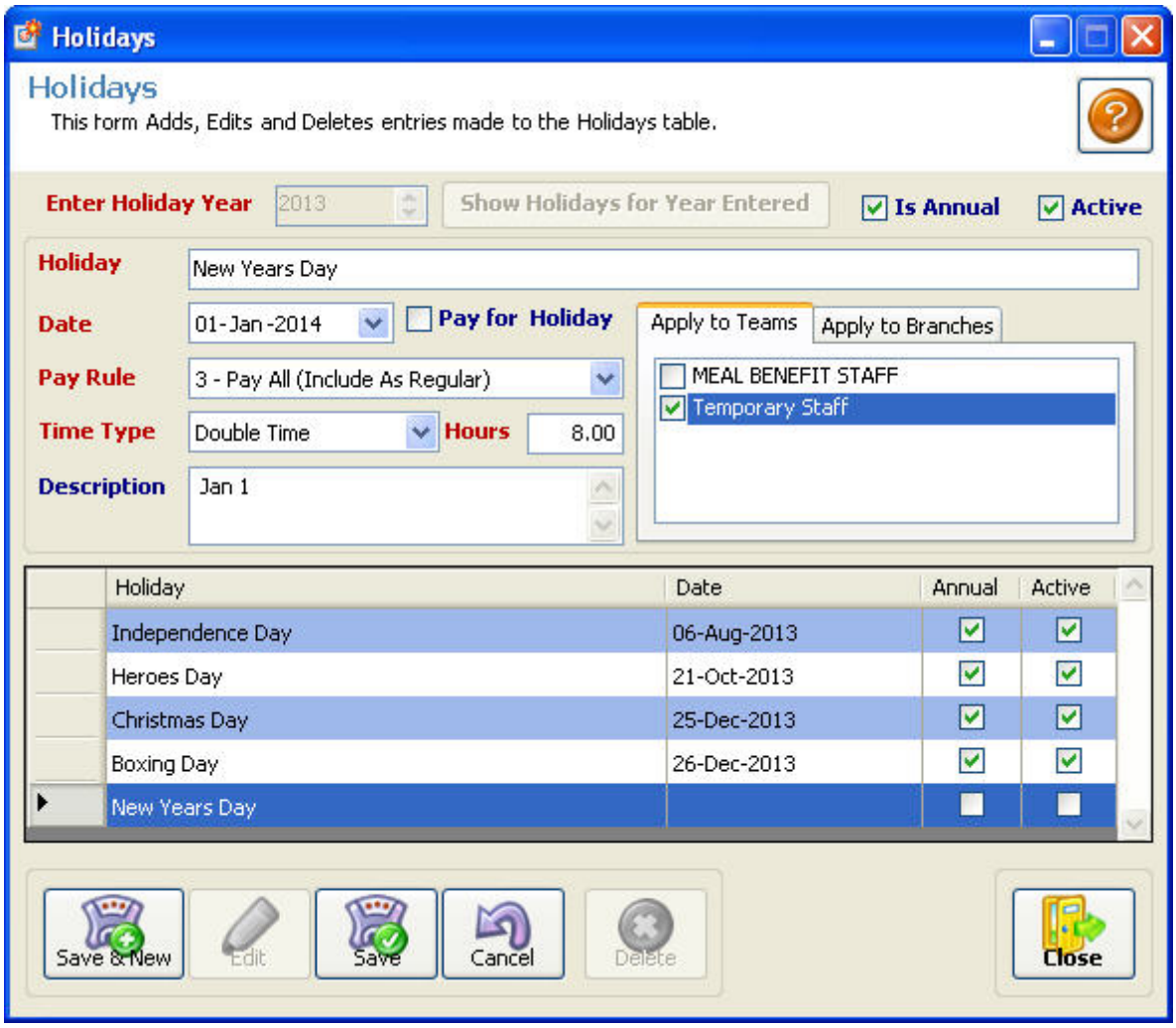

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.7.8.4 Meal Allowance Setup

MEAL MANAGEMENT **MEAL CONFIGURATION** ***MEAL ALLOWANCES***

This screen allows you to setup the meal benefit allowance(s). Allowances maybe of different values and can be assigned to different categories of staff when categorized by Work Teams.

Example: Management Staff Allowance (Daily $600, Weekly $3000, Monthly $12,000), General Workers Allowance (Daily $450, Weekly 2250, Monthly $9,000). Each Allowance with a different value will be entered separately.

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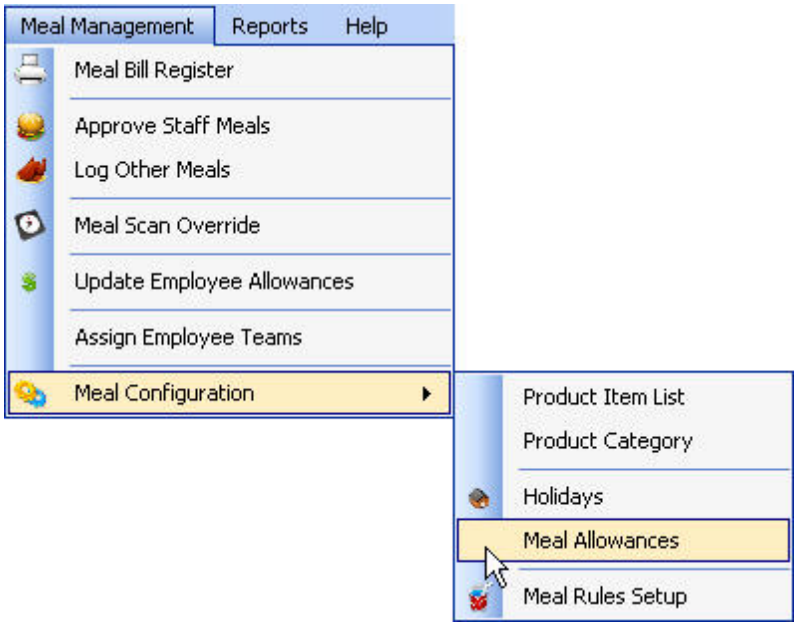

You then would designate the following:

Amount - Value of the Allowance amount.

Frequency - Interval in days relative to the allowance amount. This is used to determine how frequent to apply the allowance

when done automatically by the system.

Auto Assign - If the system to auto re-assign when allowance amounts when it expires.

Cumulative - When checked, this determines whether to add new amount of existing balance or replace it.

Ignore Days - Will not include the days checked when calculating allowance to be assigned. Eg. A daily allowance being updated

using the Update Employee Allowance tool for the period of a month will skip holidays and weekends if they are

checked

Team List - Tells the system which Work Teams qualifies for the requisite allowance.

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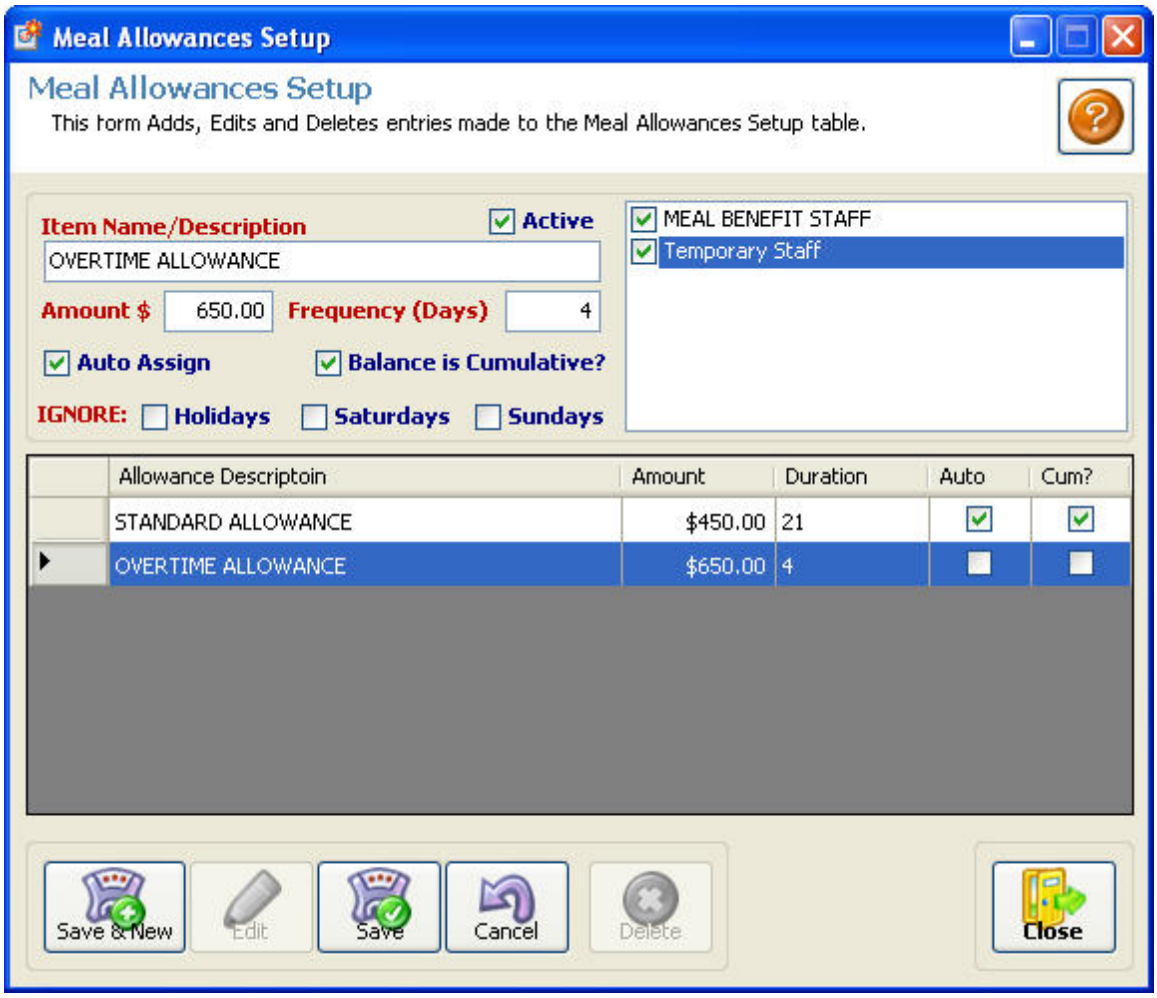
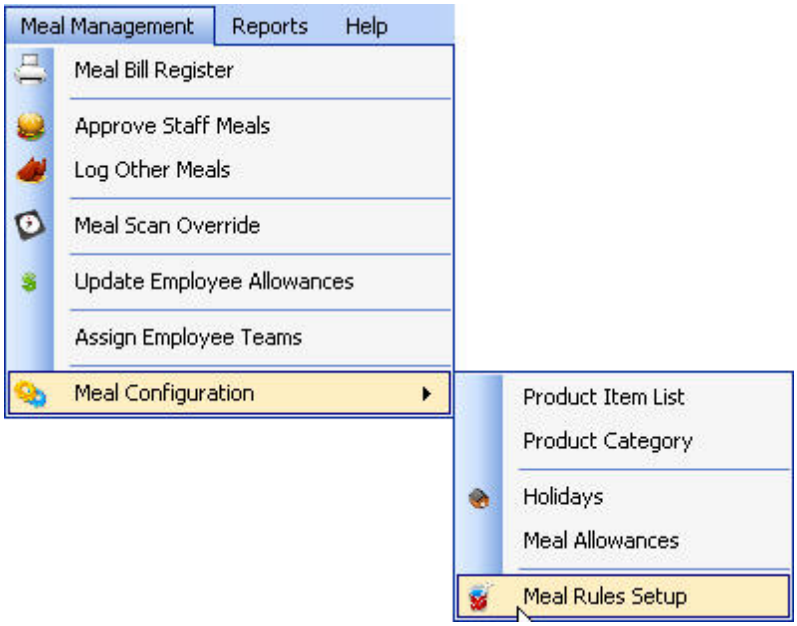


See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.7.8.5 Meal Rules Setup

MEAL MANAGEMENT **MEAL CONFIGURATION** ***MEAL RULES SETUP***



This screen only applies to situations where employees are not given an allowance but rather an “open canteen” service where employees are served any meal that is on the menu. Some employees may be allowed to have one or more meals based on their shift or seniority. Simply select the meal group and tick the Work Teams allowed to have a meal in the selected group. Eg. If an employee is lunch only, they won’t be able to scan at the biometric device for breakfast or supper.

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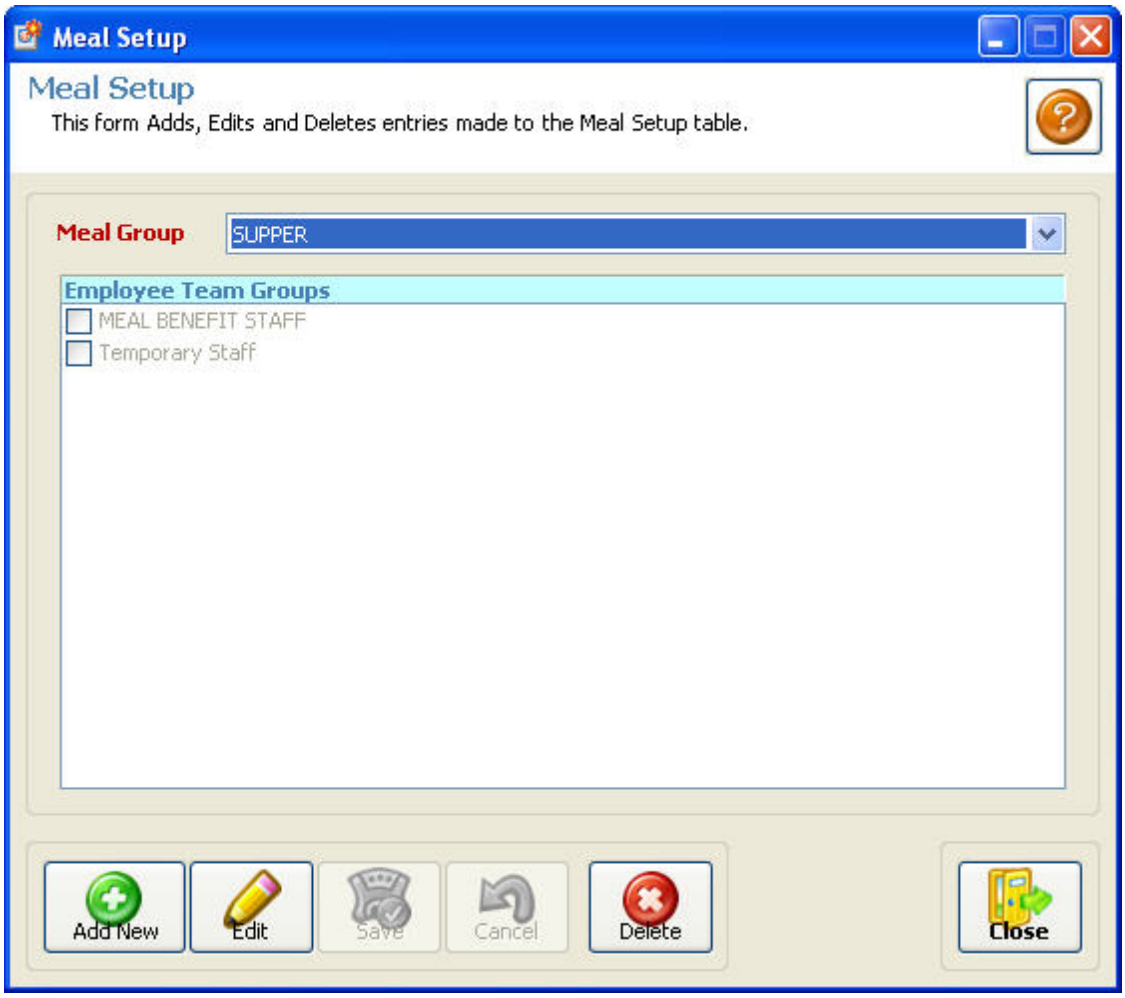

See Add, Edit and Delete topics, to learn how to maneuver this dialog window on how to make changes to database records.

4.8 Reports Menu

The main objective of any data processing application is to produce results either by the functions it carries out or by the reports it produces. Reports aids in decision making, the processing of payroll or other payments and helps identify the status of the company depending on the report selected.

Each report consist of Parameters. Parameters are criteria's by which the report can be generated. Eg. A gender parameter will allow the report to show only males, only

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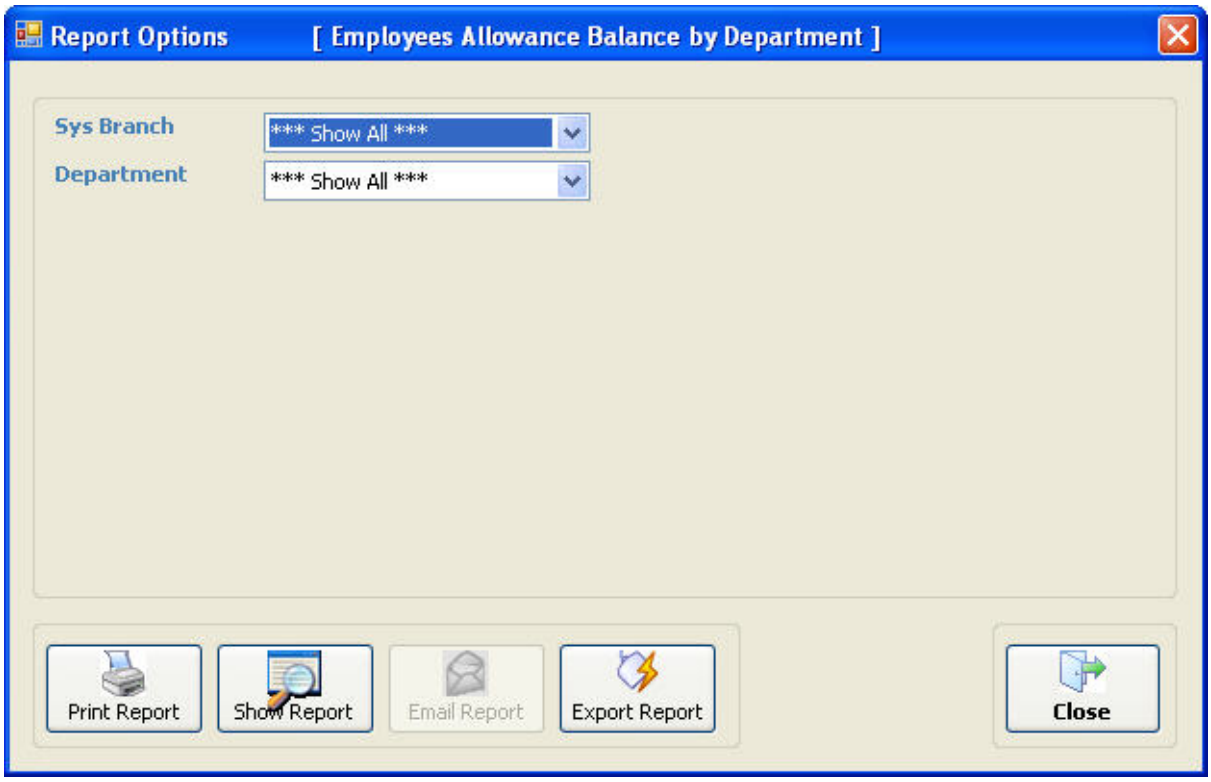
females or both.

See below sample of report parameters.



PRINT REPORT

After the parameters are set, the print report button will send the report directly to the default printer installed.

SHOW REPORT

After the parameters are set, the show report button will display a preview of the report on screen for review. Users can print or export the report from the preview if desired.

EXPORT REPORT

After the parameters are set, the export report button will save a copy of the report in a format selected by you such as Excel or PDF.

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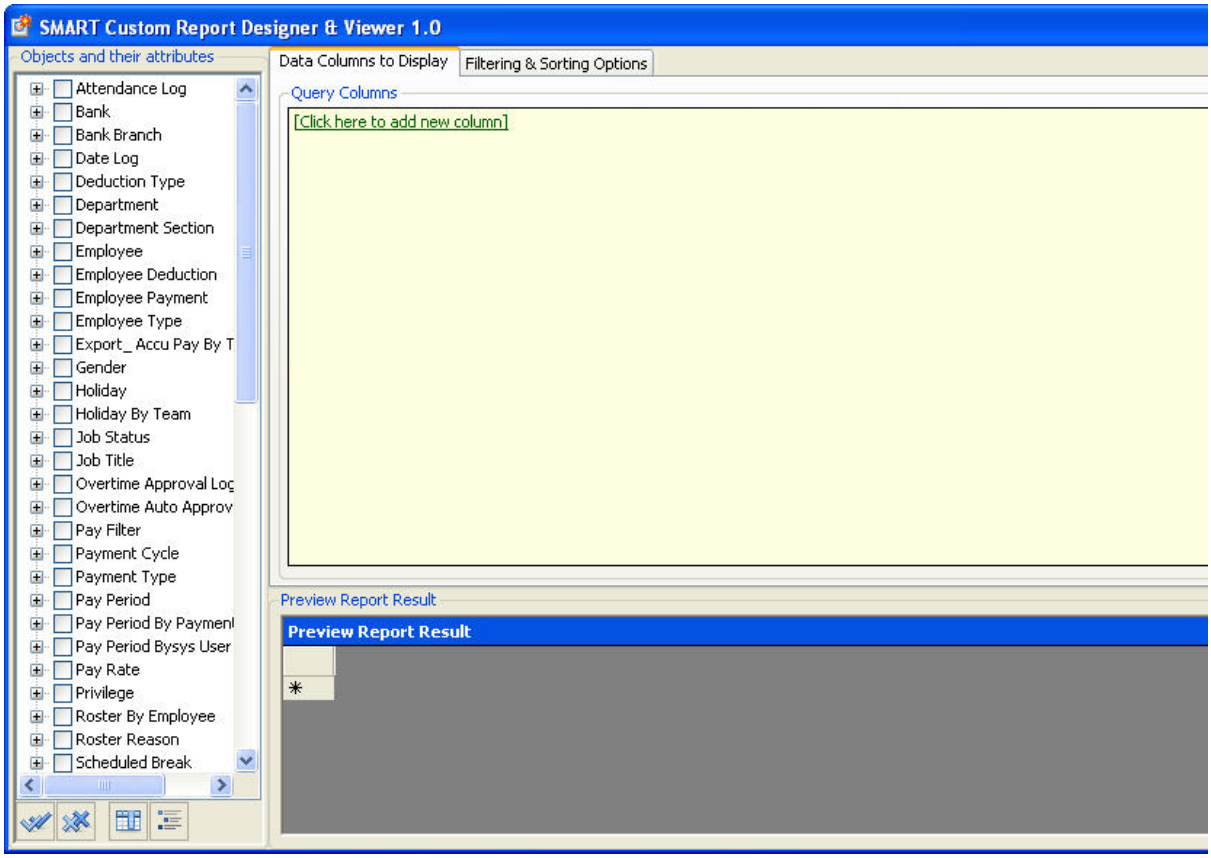
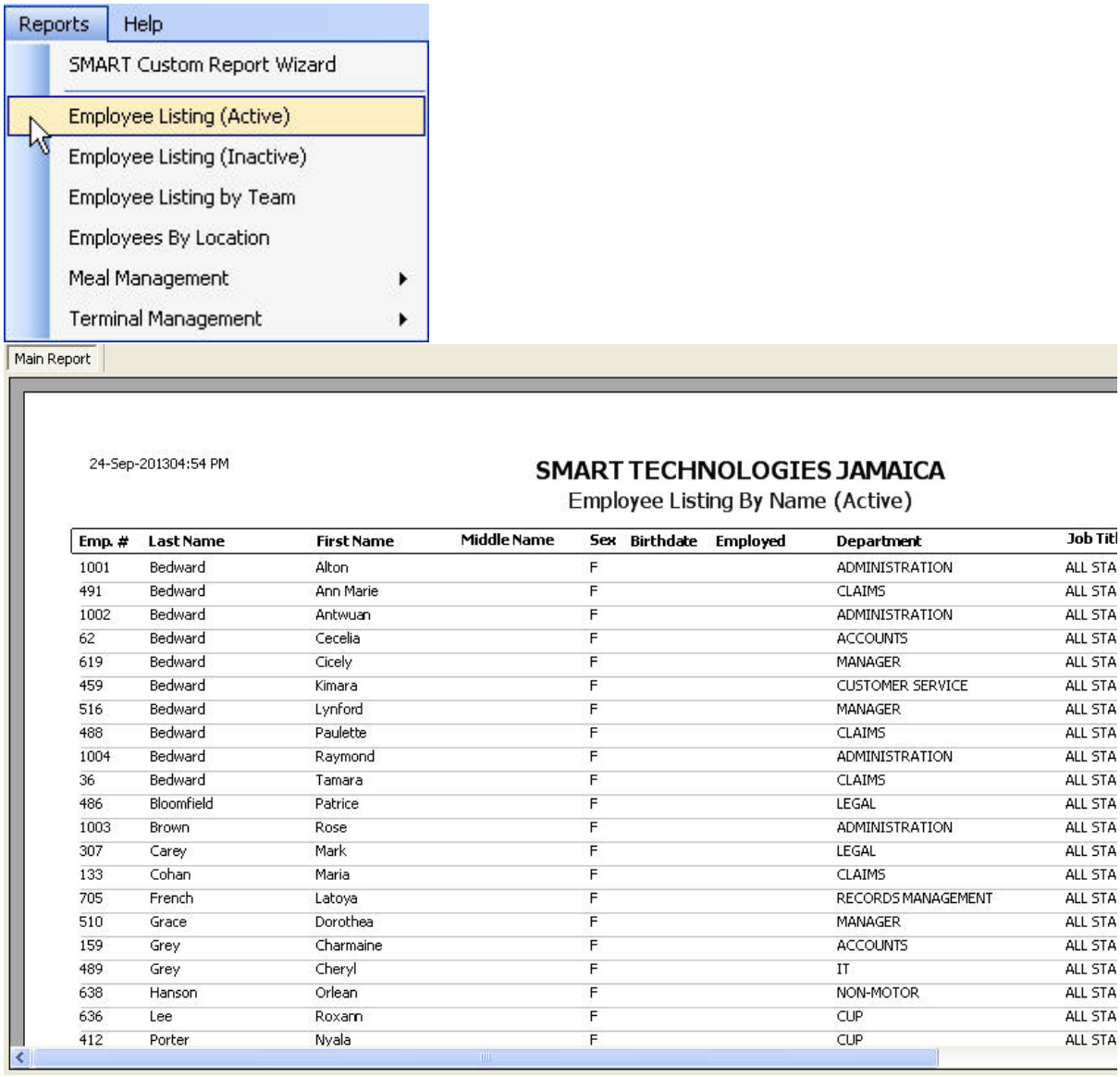
4.8.1 SMART Custom Report Wizard

Enter topic text here.



4.8.2 Employee Listing - Active

This report shows a listing of all active employees sorted by last name.



Emp. #	Last Name	First Name	Middle Name	Sex	Birthdate	Employed	Department	Job Titl
1001	Bedward	Alton		F			ADMINISTRATION	ALL STA
491	Bedward	Ann Marie		F			CLAIMS	ALL STA
1002	Bedward	Antwuan		F			ADMINISTRATION	ALL STA
62	Bedward	Cecelia		F			ACCOUNTS	ALL STA
619	Bedward	Cicely		F			MANAGER	ALL STA
459	Bedward	Kimara		F			CUSTOMER SERVICE	ALL STA
516	Bedward	Lynford		F			MANAGER	ALL STA
488	Bedward	Paulette		F			CLAIMS	ALL STA
1004	Bedward	Raymond		F			ADMINISTRATION	ALL STA
36	Bedward	Tamara		F			CLAIMS	ALL STA
486	Bloomfield	Patrice		F			LEGAL	ALL STA
1003	Brown	Rose		F			ADMINISTRATION	ALL STA
307	Carey	Mark		F			LEGAL	ALL STA
133	Cohan	Maria		F			CLAIMS	ALL STA
705	French	Latoya		F			RECORDS MANAGEMENT	ALL STA
510	Grace	Dorothea		F			MANAGER	ALL STA
159	Grey	Charmaine		F			ACCOUNTS	ALL STA
489	Grey	Cheryl		F			IT	ALL STA
638	Hanson	Orlean		F			NON-MOTOR	ALL STA
636	Lee	Roxann		F			CUP	ALL STA
412	Porter	Nyala		F			CUP	ALL STA

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4.8.3 Employee Listing - Inactive

This report shows a listing of all inactive employees sorted by last name.

11-Oct-2013 07:59 PM

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Employee Listing By Name (Inactive)

Emp. #	Last Name	First Name	Middle Name	Sex	Birthdate	Employed	Department	Job Title	Location / Branch
320	Thompson	Noel		F			NON-MOTOR	JNGI STAFF	HEAD OFFICE
733	Wright	Kuyan		F			MARKETING	JNGI STAFF	HEAD OFFICE

4.8.4 Employee Listing by Team

This report shows a listing of all active employees grouped by Work Team and sorted by last name.

11-Oct-2013 08:13 PM

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Page 1 of 5

Employee Listing By Team

Emp. #	Last Name	First Name	Middle Name	Department	Job Title
MEAL BENEFIT STAFF					
1	Afflick	Everton		ADMINISTRATION	JNGI STAFF
625	Allen	Maria		CUP	JNGI STAFF
398	Anderson	Craig		ACCOUNTS	JNGI STAFF
262	Anderson	Rayon		CREDIT	JNGI STAFF
453	Ashley	Leslie		CLAIMS	JNGI STAFF
1006	Bailey	Camille		HUMAN RESOURCES	JNGI STAFF
470	Bailey	Stacy-Ann		CUP	JNGI STAFF
641	Barrett	Dezreen		CUP	JNGI STAFF
741	Barrett	Racquel		HUMAN RESOURCES	JNGI STAFF
7	Baxter	Ann-Marie		CLAIMS	JNGI STAFF
498	Becky	Sharika		BROKER UNIT	JNGI STAFF
699	Beeput	Kevern		CLAIMS	JNGI STAFF

4.8.5 Employee Listing by Location

This report shows a listing of all active employees grouped by Branch/Location and sorted by last name.

11-Oct-2013 08:04 PM

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Employees By Location

Emp. #	Last Name	First Name	Middle Name	Sex	Birthdate	Employed	Department	Job Title	Location / Bra
HEAD OFFICE									
640	Adams	Stephanie		F			CUP	JNGI STAFF	HEAD OFFICE
1	Afflick	Everton		F			ADMINISTRATION	JNGI STAFF	HEAD OFFICE
625	Allen	Maria		F			CUP	JNGI STAFF	HEAD OFFICE
398	Anderson	Craig		F			ACCOUNTS	JNGI STAFF	HEAD OFFICE
262	Anderson	Rayon		F			CREDIT	JNGI STAFF	HEAD OFFICE
453	Ashley	Leslie		F			CLAIMS	JNGI STAFF	HEAD OFFICE
1006	Bailey	Camille		F			HUMAN RESOURCES	JNGI STAFF	HEAD OFFICE
470	Bailey	Stacy-Ann		F			CUP	JNGI STAFF	HEAD OFFICE
641	Barrett	Dezreen		F			CUP	JNGI STAFF	HEAD OFFICE
741	Barrett	Racquel		F			HUMAN RESOURCES	JNGI STAFF	HEAD OFFICE
7	Baxter	Ann-Marie		F			CLAIMS	JNGI STAFF	HEAD OFFICE

4.8.6 Meal Management Reports

The Meal Management reports menu list all reports that produce meal tallies, account charges and meal values.

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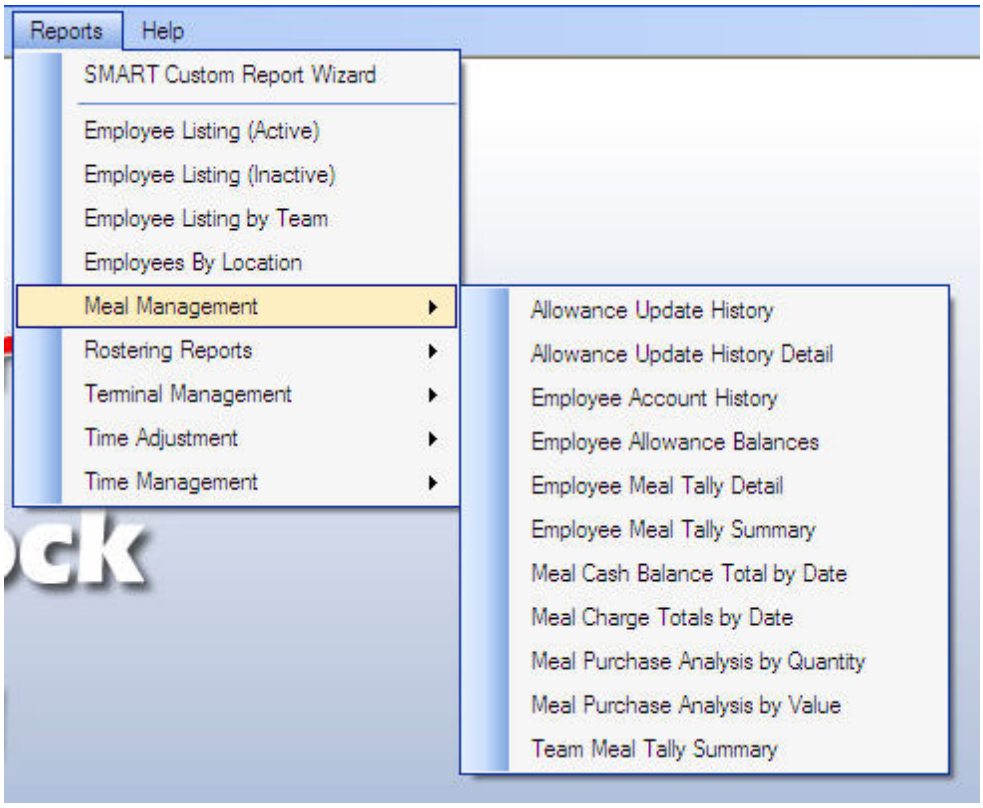

OPEN CANTEEN SYSTEM REPORTS

1. Employee Meal Tally Summary
2. Employee Meal Tally Detail
3. Team Meal Tally Summary

MEAL BENEFIT ALLOWANCE SYSTEM REPORTS

1. Allowance Update History
2. Allowance Update History Detail
3. Employee Allowance Balance
4. Employee Account History
5. Meal Cash Balance Total by Date
6. Meal Charge Total by Date
7. Meal Purchase Analysis by Value
8. Meal Purchase Analysis by Quantity

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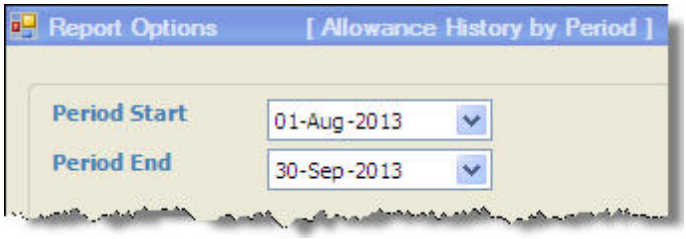
4.8.6.1 Allowance Update History

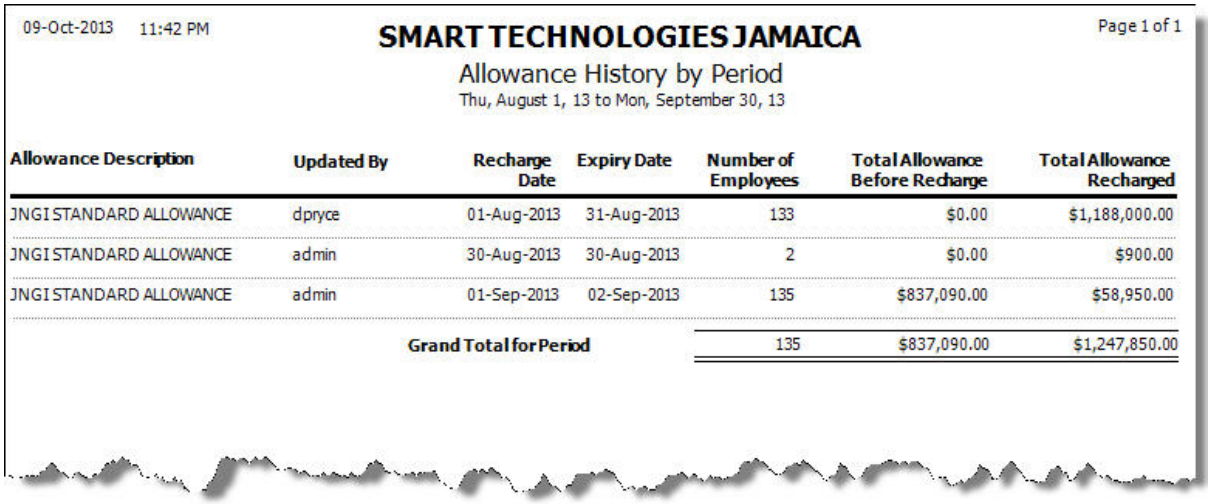
Updating employees allowances are done using the Update Employee Meal Allowance feature. This report shows a summary of all allowance updates that have been done.

PARAMETERS



This report uses two parameters, Period Start and Period End to filter allowance updates done within this period.

REPORT



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Page 1 of 1

Allowance History by Period

Thu, August 1, 13 to Mon, September 30, 13

Allowance Description	Updated By	Recharge Date	Expiry Date	Number of Employees	Total Allowance Before Recharge	Total Allowance Recharged
JNGI STANDARD ALLOWANCE	dpryce	01-Aug-2013	31-Aug-2013	133	$0.00	$1,188,000.00
JNGI STANDARD ALLOWANCE	admin	30-Aug-2013	30-Aug-2013	2	$0.00	$900.00
JNGI STANDARD ALLOWANCE	admin	01-Sep-2013	02-Sep-2013	135	$837,090.00	$58,950.00
		Grand Total for Period		135	$837,090.00	$1,247,850.00

4.8.6.2 Allowance Update History Detail

Updating employees allowances are done using the Update Employee Meal Allowance feature. This report shows the summary of a particular allowance and the details of all employees profiles on which the update was done. If an allowance update was voided, this information will also be displayed.

PARAMETERS

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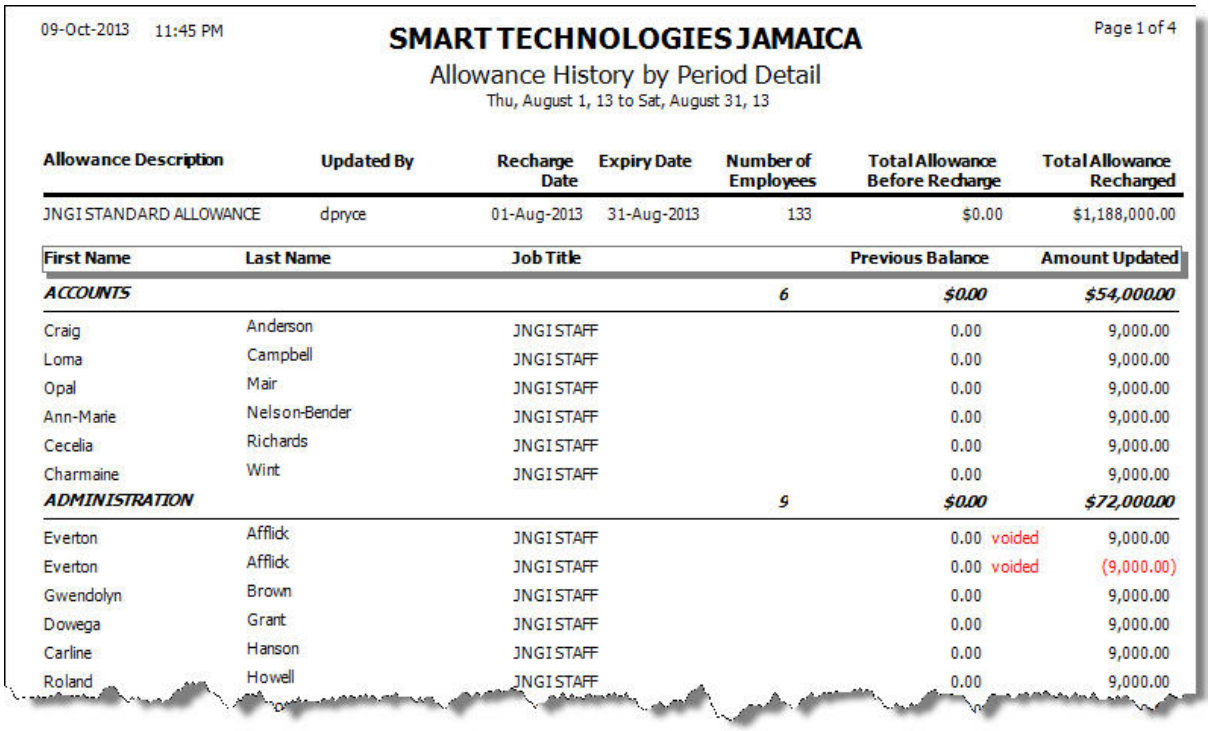
This report uses two parameters, Period Start and Period End to select a particular allowance update that was done. The dates must match exactly for the details this report to be displayed.

REPORT



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Allowance History by Period Detail

Thu, August 1, 13 to Sat, August 31, 13

Page 1 of 4

Allowance Description	Updated By	Recharge Date	Expiry Date	Number of Employees	Total Allowance Before Recharge	Total Allowance Recharged
JNGI STANDARD ALLOWANCE	dpryce	01-Aug-2013	31-Aug-2013	133	$0.00	$1,188,000.00

First Name	Last Name	Job Title		Previous Balance	Amount Updated
ACCOUNTS			***6***	***$0.00***	***$54,000.00***
Craig	Anderson	JNGI STAFF		0.00	9,000.00
Loma	Campbell	JNGI STAFF		0.00	9,000.00
Opal	Mair	JNGI STAFF		0.00	9,000.00
Ann-Marie	Nelson-Bender	JNGI STAFF		0.00	9,000.00
Cecelia	Richards	JNGI STAFF		0.00	9,000.00
Charmaine	Wint	JNGI STAFF		0.00	9,000.00
ADMINISTRATION			***9***	***$0.00***	***$72,000.00***
Everton	Afflick	JNGI STAFF		0.00 voided	9,000.00
Everton	Afflick	JNGI STAFF		0.00 voided	(9,000.00)
Gwendolyn	Brown	JNGI STAFF		0.00	9,000.00
Dowega	Grant	JNGI STAFF		0.00	9,000.00
Carline	Hanson	JNGI STAFF		0.00	9,000.00
Roland	Howell	JNGI STAFF		0.00	9,000.00

4.8.6.3 Employee Account History

Enter topic text here.

PARAMETERS

REPORT

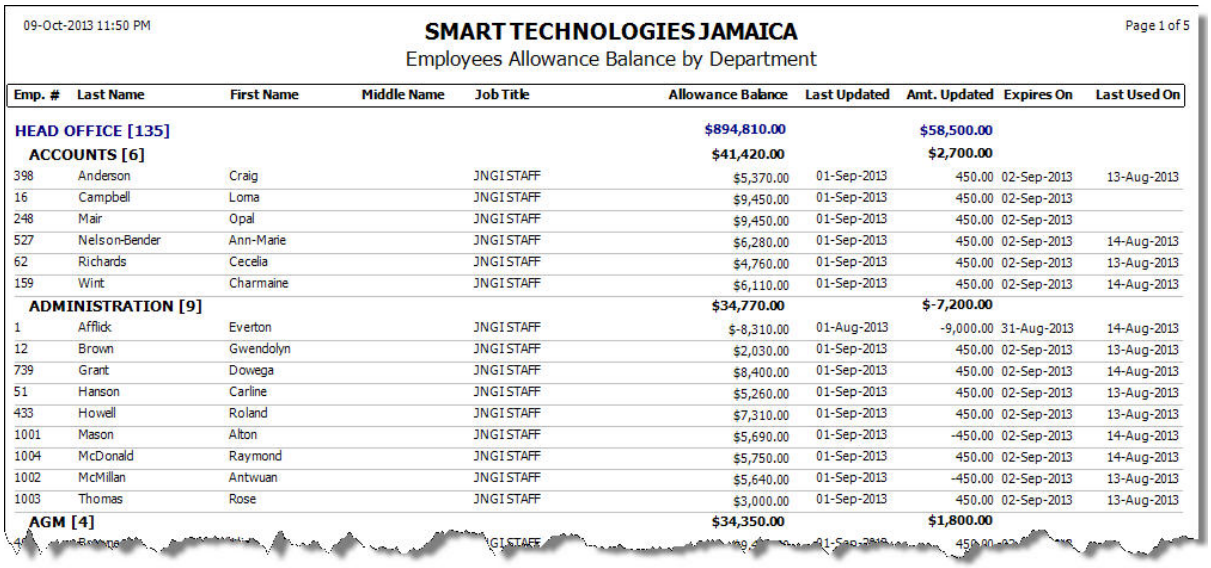
4.8.6.4 Employee Allowance Balances

Updating employees allowances are done using the Update Employee Meal Allowance feature. This report shows the allowance balance status of each employee by their department.

PARAMETERS

This report is filtered by Branch and Department. Select one or both as needed.

REPORT



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Employees Allowance Balance by Department

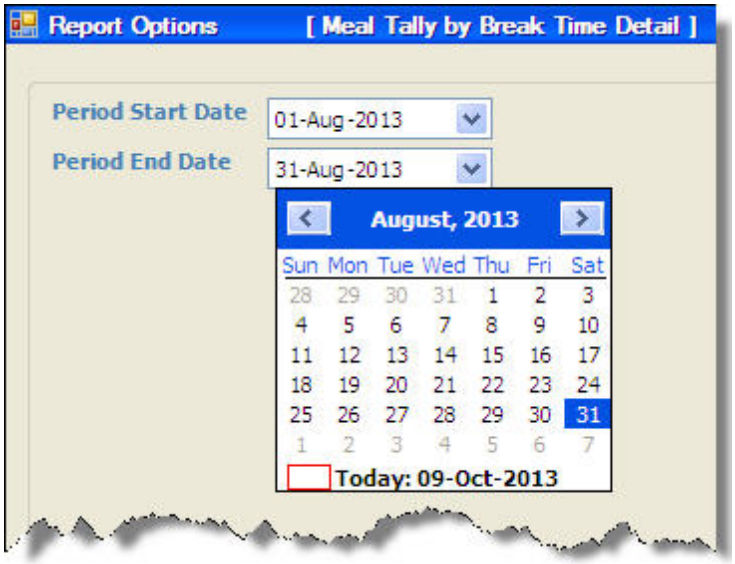
Page 1 of 5

Emp. #	Last Name	First Name	Middle Name	Job Title	Allowance Balance	Last Updated	Amt. Updated	Expires On	Last Used On
HEAD OFFICE [135]					**$894,810.00**		**$58,500.00**		
ACCOUNTS [6]					**$41,420.00**		**$2,700.00**		
398	Anderson	Craig		JNGISTAFF	$5,370.00	01-Sep-2013	450.00	02-Sep-2013	13-Aug-2013
16	Campbell	Loma		JNGISTAFF	$9,450.00	01-Sep-2013	450.00	02-Sep-2013	
248	Mair	Opal		JNGISTAFF	$9,450.00	01-Sep-2013	450.00	02-Sep-2013	
527	Nelson-Bender	Ann-Marie		JNGISTAFF	$6,280.00	01-Sep-2013	450.00	02-Sep-2013	14-Aug-2013
62	Richards	Cecelia		JNGISTAFF	$4,760.00	01-Sep-2013	450.00	02-Sep-2013	13-Aug-2013
159	Wint	Charmaine		JNGISTAFF	$6,110.00	01-Sep-2013	450.00	02-Sep-2013	14-Aug-2013
ADMINISTRATION [9]					**$34,770.00**		**$-7,200.00**		
1	Afflick	Everton		JNGISTAFF	$-8,310.00	01-Aug-2013	-9,000.00	31-Aug-2013	14-Aug-2013
12	Brown	Gwendolyn		JNGISTAFF	$2,030.00	01-Sep-2013	450.00	02-Sep-2013	13-Aug-2013
739	Grant	Dowega		JNGISTAFF	$8,400.00	01-Sep-2013	450.00	02-Sep-2013	14-Aug-2013
51	Hanson	Carline		JNGISTAFF	$5,260.00	01-Sep-2013	450.00	02-Sep-2013	13-Aug-2013
433	Howell	Roland		JNGISTAFF	$7,310.00	01-Sep-2013	450.00	02-Sep-2013	13-Aug-2013
1001	Mason	Alton		JNGISTAFF	$5,690.00	01-Sep-2013	-450.00	02-Sep-2013	14-Aug-2013
1004	McDonald	Raymond		JNGISTAFF	$5,750.00	01-Sep-2013	450.00	02-Sep-2013	14-Aug-2013
1002	McMillan	Antwuan		JNGISTAFF	$5,640.00	01-Sep-2013	-450.00	02-Sep-2013	13-Aug-2013
1003	Thomas	Rose		JNGISTAFF	$3,000.00	01-Sep-2013	450.00	02-Sep-2013	13-Aug-2013
AGM [4]					**$34,350.00**		**$1,800.00**		

4.8.6.5 Employee Meal Tally Detail

This report shows a detailed tally of all scans by employees for the select date period. A total for each employee and date is grouped and then summarized by the Work Team.

PARAMETERS



This report uses two parameters, Period Start Date and Period End Date to tally all employee scans by Work Team for the selected dates.

REPORT

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10-Oct-2013 12:00 AM

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Meal Tally by Break Time Detail

Thu, August 1, 13 to Sat, August 31, 13

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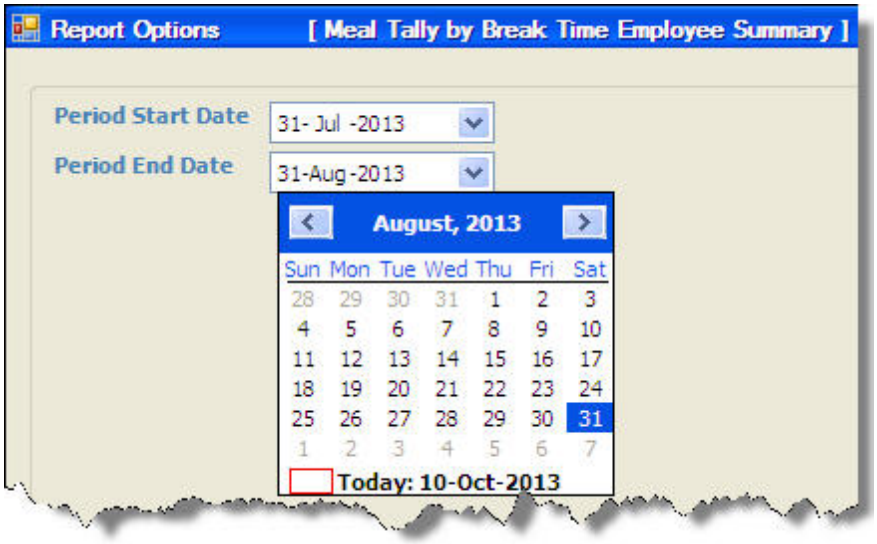
Employee Name	Day #	Work Date	BREAKFAST Ends 11AM	LUNCH Ends 3PM	SUPPER > 3PM	Punch Count
MEAL BENEFIT STAFF						1,012
	1	05-Aug-2013	7:50 AM	1:27 PM		2
	2	07-Aug-2013	10:43 AM			1
	3	08-Aug-2013	7:45 AM	11:54 AM		2
	4	09-Aug-2013	8:03 AM	12:24 PM		2
	5	12-Aug-2013	7:57 AM	12:47 PM		2
	6	13-Aug-2013	7:46 AM	12:00 PM		2
	7	14-Aug-2013	7:59 AM 9:16 AM 10:33 AM			3
AFFLICK, EVERTON -1			9	5	0	14
	1	02-Aug-2013		2:03 PM		1
	2	05-Aug-2013	10:05 AM			1
	3	07-Aug-2013		1:11 PM		1
	4	08-Aug-2013		1:27 PM		1
	5	09-Aug-2013		1:41 PM		1
	6	12-Aug-2013		1:14 PM		1
	7	13-Aug-2013		1:50 PM		1
ANDERSON, CRAIG -398			1	6	0	7
	1	05-Aug-2013		1:44 PM		1
	2	07-Aug-2013		1:29 PM		1
	3	08-Aug-2013		2:45 PM		1
	4	09-Aug-2013		2:19 PM		1
	5	12-Aug-2013		1:31 PM		1
	6	13-Aug-2013		1:27 PM		1
[illegible]				[illegible]	0	6

4.8.6.6 Employee Meal Tally Summary

This report shows a summary tally of all scans by employees for the select date period. A total for each employee is grouped and then summarized by the Work Team.

PARAMETERS



This report uses two parameters, Period Start Date and Period End Date to tally all

employee scans by Work Team for the selected dates.

REPORT

10-Oct-2013 12:03 AM

SMART TECHNOLOGIES JAMAICA

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Meal Tally by Break Time Employee Summary

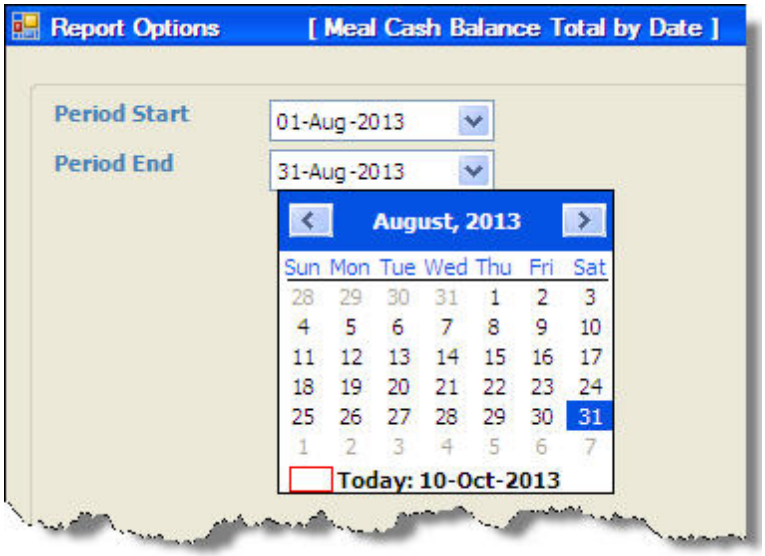
Wed, July 31, 13 to Sat, August 31, 13

Employee Name	BREAKFAST Ends 11AM	LUNCH Ends 3PM	SUPPER > 3PM	Punch Count
MEAL BENEFIT STAFF				1,014
AFFLICK, EVERTON -1	9	5	0	14
ANDERSON, CRAIG -398	1	6	0	7
ANDERSON, RAYON -262	0	6	0	6
ASHLEY, LESLIE -453	6	4	0	10
BAILEY, CAMILLE -1006	8	7	0	15
BAILEY, STACY-ANN -470	0	4	0	4
BARRETT, DEZREEN -641	3	6	0	9
BARRETT, RACQUEL -741	2	3	0	5
BECKY, SHARIKA -498	6	6	0	12
BEEPUT, KEVERN -699	2	5	0	7
BENJAMIN, DANIEL -564	5	1	0	6
BENNETT-MITCHELL, KHADENE -439	2	8	0	10
BROWN, ALIESHIA -651	3	3	0	6
BROWN, GWENDOLYN -12	1	3	2	6
BROWN, KAREKIA -501	5	4	0	9
BROWN-ROSE, PAULINE -583	0	1	0	1
BRYANT, JANET -196	4	7	0	11
CAMERON, AUDREY -539	1	1	0	2

4.8.6.7 Meal Cash Balance Total by Date

This report is used to summarize by department all account charges and or cash payments done at the Meal Register Console

PARAMETERS



This report uses two parameters, Period Start and Period End to summarize account charges and cash payments.

REPORT

10-Oct-2013 12:05 AM

SMART TECHNOLOGIES JAMAICA

Page 1 of 1

Meal Cash Balance Total by Date

Thu, August 1, 13 to Sat, August 31, 13

Department	Company Charge	Total Cash Payment	Grand Total
ACCOUNTS	15,280.00	$0.00	15,280.00
ADMINISTRATION	39,930.00	$0.00	39,930.00
AGM	3,450.00	$0.00	3,450.00
BROKER UNIT	15,860.00	$0.00	15,860.00
CALL CENTRE	24,370.00	$0.00	24,370.00
CLAIMS	50,790.00	$0.00	50,790.00
CREDIT	13,040.00	$0.00	13,040.00
CUP	28,410.00	$0.00	28,410.00
CUSTOMER SERVICE	14,600.00	$0.00	14,600.00
GROUP OFFICE	6,640.00	$0.00	6,640.00
HUMAN RESOURCES	5,820.00	$0.00	5,820.00
IT	13,950.00	$0.00	13,950.00
LEGAL	14,100.00	$0.00	14,100.00
MANAGEMENT INFORMATION	6,090.00	$0.00	6,090.00
MANAGER	15,270.00	$0.00	15,270.00
MARKETING	2,280.00	$0.00	2,280.00
MOTOR	16,860.00	$0.00	16,860.00
NON-MOTOR	4,840.00	$0.00	4,840.00
REASSURANCE	3,550.00	$0.00	3,550.00
RECORDS MANAGEMENT	48,420.00	$0.00	48,420.00
Grand Total	343,550.00	$0.00	343,550.00

4.8.6.8 Meal Charge Total by Date

This report is used to summarize by department all account charges done at the Meal Register Console. It shows the number of employees for each department that accumulated the charge amount, the total charge, the allowance balance before the charges and the difference of both.

PARAMETERS

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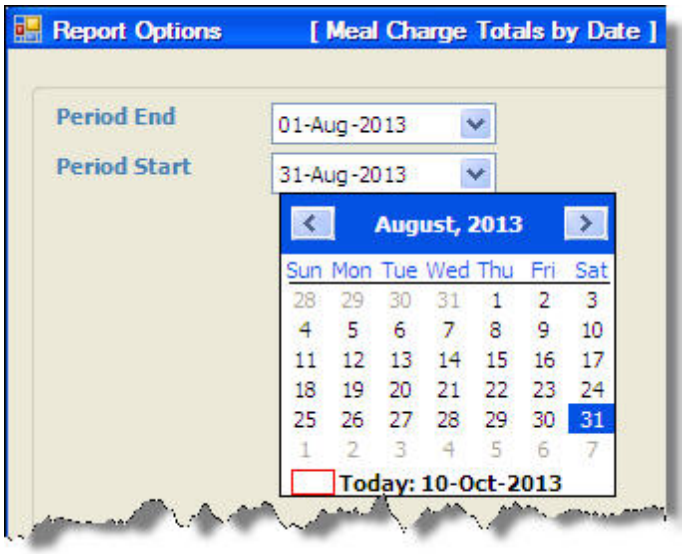

This report uses two parameters, Period Start and Period End to summarize account charges and cash payments.

REPORT

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Meal Charge Totals by Date

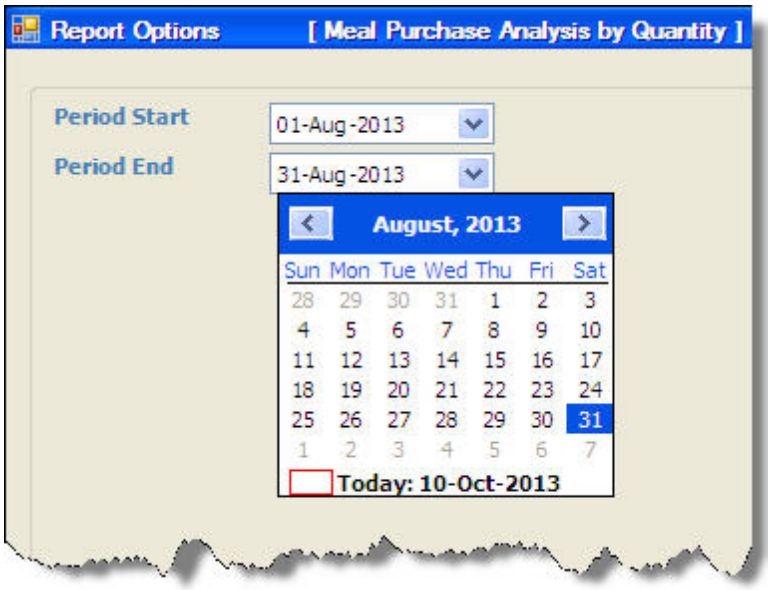
Sat, August 31, 13 to Thu, August 1, 13

Department	Number of Employees	Total Charges	Total Allowance Before Charge	Total Allowance After Charge
ACCOUNTS	4	12,760.00	36,000.00	23,240.00
ADMINISTRATION	9	29,830.00	81,000.00	51,170.00
AGM	2	3,450.00	18,000.00	14,550.00
BROKER UNIT	3	11,550.00	27,000.00	15,450.00
CALL CENTRE	8	21,790.00	72,000.00	50,210.00
CLAIMS	16	44,310.00	144,000.00	99,690.00
CREDIT	5	13,040.00	45,000.00	31,960.00
CUP	9	24,380.00	81,000.00	56,620.00
CUSTOMER SERVICE	6	14,300.00	54,000.00	39,700.00
GROUP OFFICE	2	6,640.00	18,000.00	11,360.00
HUMAN RESOURCES	3	5,190.00	27,000.00	21,810.00
IT	6	12,860.00	54,000.00	41,140.00
LEGAL	4	9,790.00	36,000.00	26,210.00
MANAGEMENT INFORMATION	2	5,380.00	18,000.00	12,620.00
MANAGER	7	14,940.00	63,000.00	48,060.00
MARKETING	1	2,030.00	9,000.00	6,970.00
MOTOR	5	14,220.00	45,000.00	30,780.00
NON-MOTOR	3	3,670.00	27,000.00	23,330.00
REASSURANCE	1	3,550.00	9,000.00	5,450.00
RECORDS MANAGEMENT	15	42,670.00	135,000.00	92,330.00
Grand Total	111	296,350.00	999,000.00	702,650.00

4.8.6.9 Meal Purchase Analysis by Quantity

This report aims to analyze the popularity of each Product Item based on its purchasing trend. The items with the largest number of purchased will be displayed first along with the Product Category.

PARAMETERS



This report uses two parameters, Period Start and Period End to summarize the purchase analysis data.

REPORT

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Page 1 of 2

Meal Purchase Analysis by Quantity

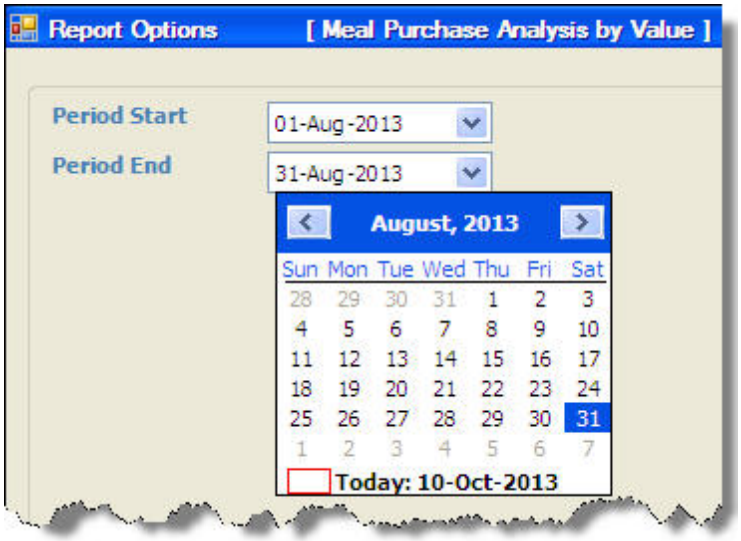
Thu, August 1, 13 to Sat, August 31, 13

Category	Meal Item Description	Total Purchased	Total Cost	Total Value
MEALS				
	MEAL MEDIUM	518	$149,820.00	$170,940.00
	MEAL LARGE	87	$21,600.00	$39,150.00
	TOTAL MEALS	*605*	*$171,420.00*	*$210,090.00*
MISCELLANEOUS				
	LUNCH BOX SMALL	179	$1,580.00	$1,790.00
	MISC ITEM	157	$22,930.00	$25,410.00
	LUNCH BOX LARGE	51	$900.00	$1,020.00
	TOTAL MISCELLANEOUS	*387*	*$25,410.00*	*$28,220.00*
BREAKFAST				
	BREAKFAST	230	$33,150.00	$34,500.00
	TOTAL BREAKFAST	*230*	*$33,150.00*	*$34,500.00*
DRINKS				
	DRINK C	83	$7,600.00	$8,300.00
	DRINK D	39	$4,800.00	$6,240.00
	DRINK A	29	$2,240.00	$2,320.00
	DRINK B	16	$1,920.00	$1,920.00
	DRINK E	4	$720.00	$720.00
	TOTAL DRINKS	*171*	*$17,280.00*	*$19,500.00*

4.8.6.10 Meal Purchase Analysis by Value

This report aims to analyze the popularity of each Product Item based on its purchasing trend. The items with the highest value purchased will be displayed first along with the Product Category.

PARAMETERS



This report uses two parameters, Period Start and Period End to summarize the purchase analysis data.

REPORT

10-Oct-2013 12:10 AM

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Meal Purchase Analysis by Value

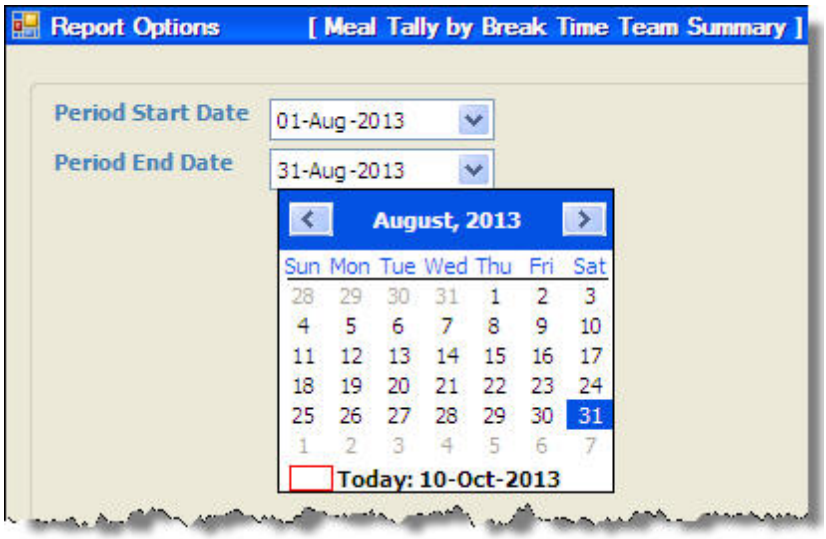
Thu, August 1, 13 to Sat, August 31, 13

Category	Meal Item Description	Total Purchased	Total Cost	Total Value
MEALS				
	MEAL MEDIUM	518	$149,820.00	170,940.00
	MEAL LARGE	87	$21,600.00	39,150.00
	TOTAL MEALS	*605*	*$171,420.00*	*210,090.00*
BREAKFAST				
	BREAKFAST	230	$33,150.00	34,500.00
	TOTAL BREAKFAST	*230*	*$33,150.00*	*34,500.00*
MISCELLANEOUS				
	MISC ITEM	157	$22,930.00	25,410.00
	LUNCH BOX SMALL	179	$1,580.00	1,790.00
	LUNCH BOX LARGE	51	$900.00	1,020.00
	TOTAL MISCELLANEOUS	*387*	*$25,410.00*	*28,220.00*
SANDWICHES				
	SANDWICH A	76	$11,250.00	11,400.00
	SANDWICH C	30	$5,040.00	5,400.00
	SANDWICH B	14	$2,600.00	2,800.00
	TOTAL SANDWICHES	*120*	*$18,890.00*	*19,600.00*
DRINKS				

4.8.6.11 Team Meal Tally Summary

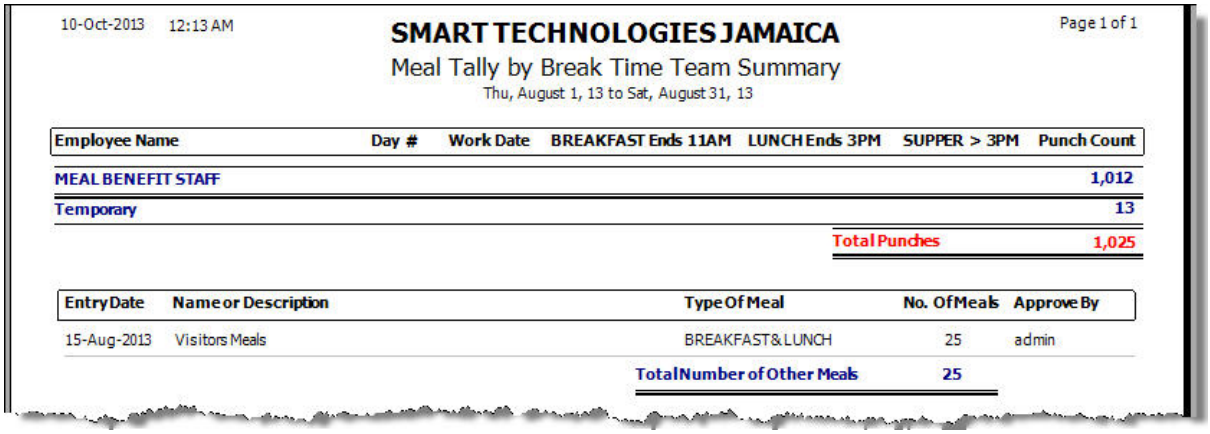
This report shows a summary tally of all scans by employees for the select date period. A total for each Work Team is grouped along with the list of Log Other Meals.

PARAMETERS



This report uses two parameters, Period Start Date and Period End Date to tally all scans by Work Team for the selected dates.

REPORT



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SMART TECHNOLOGIES JAMAICA

Meal Tally by Break Time Team Summary

Thu, August 1, 13 to Sat, August 31, 13

Page 1 of 1

Employee Name	Day #	Work Date	BREAKFAST Ends 11AM	LUNCH Ends 3PM	SUPPER > 3PM	Punch Count
MEAL BENEFIT STAFF						1,012
Temporary						13
					Total Punches	1,025

Entry Date	Name or Description	Type Of Meal	No. Of Meals	Approve By
15-Aug-2013	Visitors Meals	BREAKFAST & LUNCH	25	admin
		Total Number of Other Meals	25	

4.8.7 Terminal Management Reports

The Terminal Management report menu group as all pre-defined reports associated with all transactions on the Time Clocks and registered employees.

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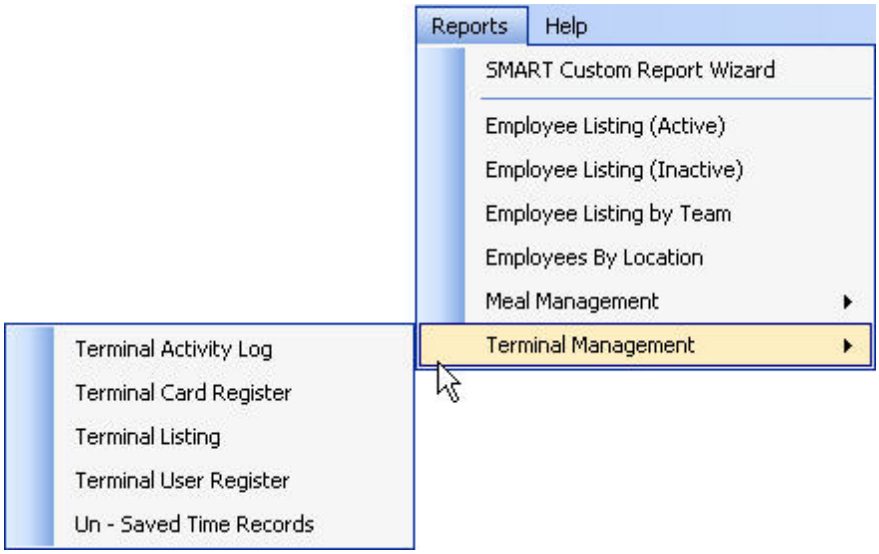
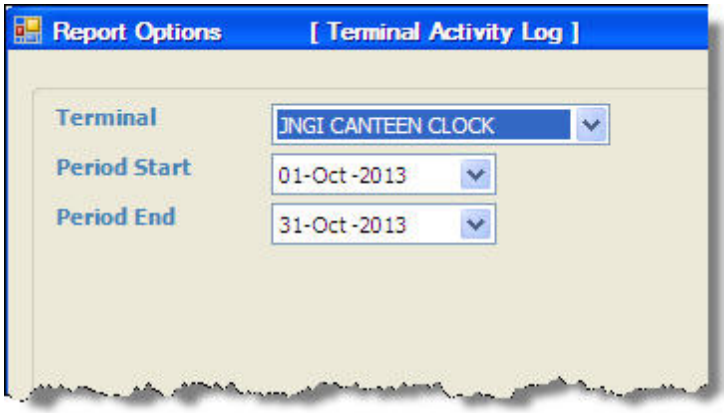


4.8.7.1 Terminal Activity Log

This report shows a history of time loading procedures. Since the time data is stored on the Time Clocks, the server as set intervals define in the Terminal Actions section auto loads this information.

PARAMETERS



This report can be filtered by selecting a date period and one or all time clocks installed by their name.

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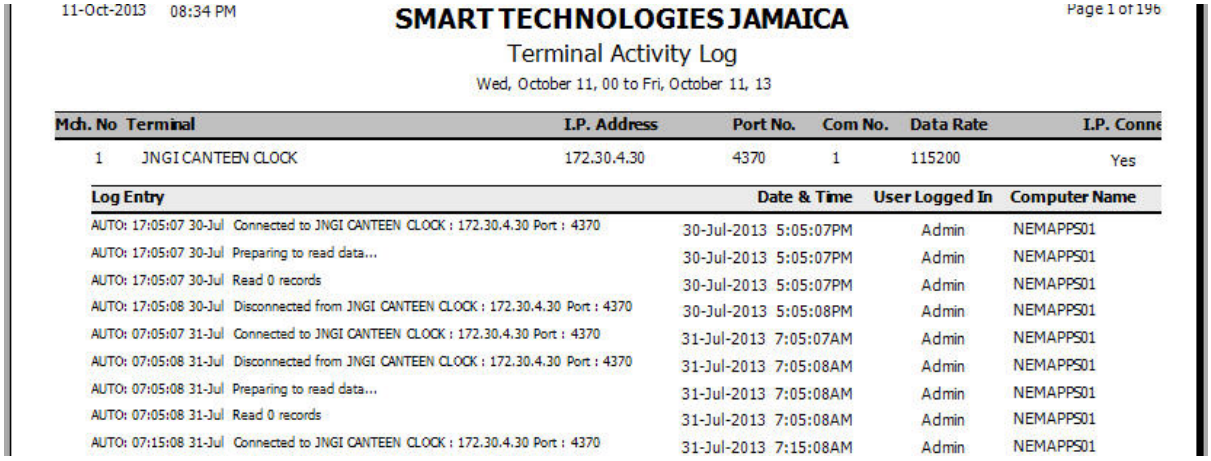
REPORT



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SMART TECHNOLOGIES JAMAICA

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Terminal Activity Log

Wed, October 11, 00 to Fri, October 11, 13

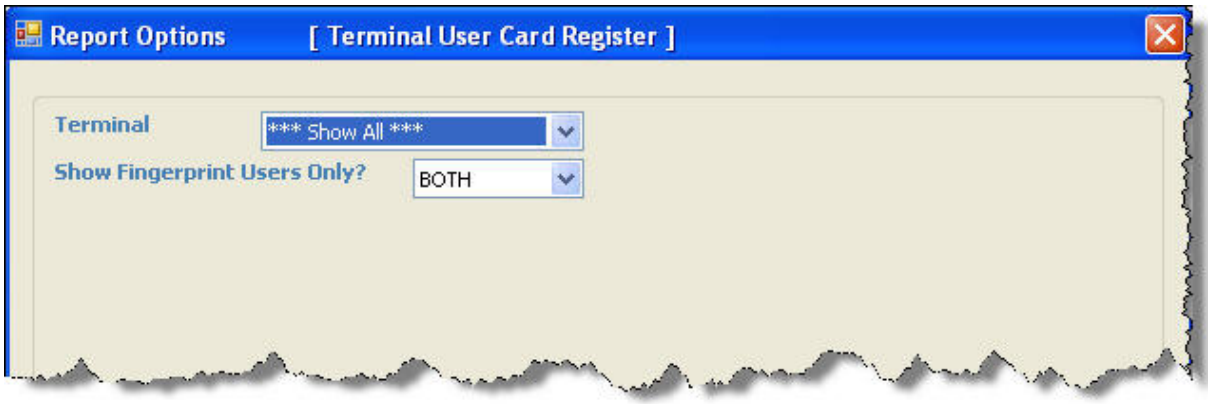
Mch. No	Terminal	I.P. Address	Port No.	Com No.	Data Rate	I.P. Conne
1	JNGI CANTEEN CLOCK	172.30.4.30	4370	1	115200	Yes

Log Entry	Date & Time	User Logged In	Computer Name
AUTO: 17:05:07 30-Jul Connected to JNGI CANTEEN CLOCK : 172.30.4.30 Port : 4370	30-Jul-2013 5:05:07PM	Admin	NEMAPPS01
AUTO: 17:05:07 30-Jul Preparing to read data...	30-Jul-2013 5:05:07PM	Admin	NEMAPPS01
AUTO: 17:05:07 30-Jul Read 0 records	30-Jul-2013 5:05:07PM	Admin	NEMAPPS01
AUTO: 17:05:08 30-Jul Disconnected from JNGI CANTEEN CLOCK : 172.30.4.30 Port : 4370	30-Jul-2013 5:05:08PM	Admin	NEMAPPS01
AUTO: 07:05:07 31-Jul Connected to JNGI CANTEEN CLOCK : 172.30.4.30 Port : 4370	31-Jul-2013 7:05:07AM	Admin	NEMAPPS01
AUTO: 07:05:08 31-Jul Disconnected from JNGI CANTEEN CLOCK : 172.30.4.30 Port : 4370	31-Jul-2013 7:05:08AM	Admin	NEMAPPS01
AUTO: 07:05:08 31-Jul Preparing to read data...	31-Jul-2013 7:05:08AM	Admin	NEMAPPS01
AUTO: 07:05:08 31-Jul Read 0 records	31-Jul-2013 7:05:08AM	Admin	NEMAPPS01
AUTO: 07:15:08 31-Jul Connected to JNGI CANTEEN CLOCK : 172.30.4.30 Port : 4370	31-Jul-2013 7:15:08AM	Admin	NEMAPPS01

4.8.7.2 Terminal Card Register

This report give a record of all employees registered on a Time Clock with their access/ proxy card numbers. This can be used for issuing or auditing purposes.

PARAMETERS



This report can be filtered by the name of the Time Clock and showing users that have (or don't or both) fingerprints registered.

REPORT

11-Oct-2013 08:42 PM

SMART TECHNOLOGIES JAMAICA

Terminal User Card Register

Page 1 of 4

Mch. No	Terminal	I.P. Address	Port No.	Com No.	Data Rate	I.P. Conne
1	JNGI CANTEEN CLOCK	172.30.4.30	4370	1	115200	Yes

Enroll No.	Registered User	User Privilege	Card Number	Is Active
2	Adams,Stephanie - 640	Regular User	14511280	Yes
3	AFFLICK, EVERTON - 1	Regular User	14498120	Yes
4	ALLEN, MARIA - 625	Regular User	14500384	Yes
5	ANDERSON, CRAIG - 398	Regular User	14524505	Yes
6	ANDERSON, RAYON - 262	Regular User	14505053	Yes
7	ASHLEY, LESLIE - 453	Regular User	14523336	Yes
8	BAILEY, CAMILLE - 1006	Regular User	14523348	Yes
9	BAILEY, STACY-ANN - 470	Regular User	14506041	Yes
10	BARRETT, DEZREEN - 641	Regular User	14499239	Yes
11	BARRETT, RACQUEL - 741	Regular User	14505200	Yes
12	BAXTER, ANN-MARIE - 7	Regular User	14510312	Yes
13	BECKY, SHARIKA - 498	Regular User	14510883	Yes
14	BEEPUT, KEVERN - 699	Regular User	14510562	Yes

4.8.7.3 Terminal Listing

This report shows a list of all Time Clocks installed and related configuration information.

PARAMETERS

There are no parameters for this report.

REPORT

25-Sep-2011 09:06 AM

SMART TECHNOLOGIES JAMAICA

Terminal Listing

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Mch. No.	Terminal	I.P. Address	Port No.	Com No.	Data Rate	I.P. Conne
1	JNGI CANTEEN CLOCK	172.30.4.30	4370	1	115200	Yes

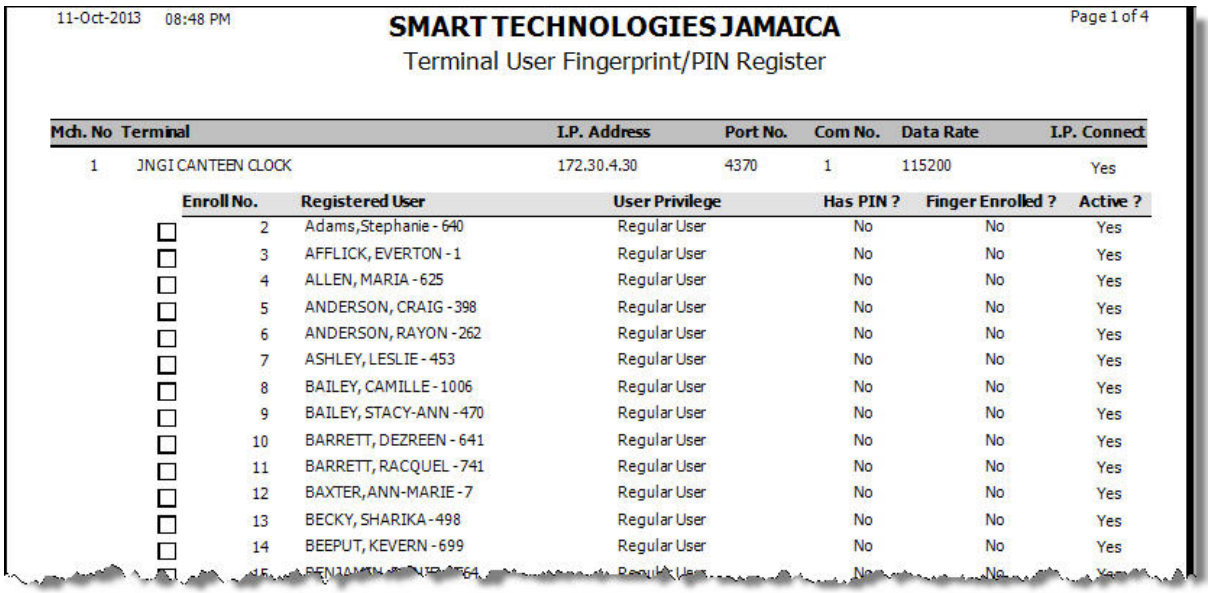
4.8.7.4 Terminal User Register

This report give a record of all employees registered on a Time Clock and their the status of their fingerprint registration. This can be used for issuing or auditing purposes to see how has not yet been enrolled.

PARAMETERS

This report can be filtered by the name of the Time Clock and showing users that have (or don't or both) fingerprints registered.

REPORT



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SMART TECHNOLOGIES JAMAICA

Terminal User Fingerprint/PIN Register

Page 1 of 4

Mch. No	Terminal	I.P. Address	Port No.	Com No.	Data Rate	I.P. Connect
1	JNGI CANTEEN CLOCK	172.30.4.30	4370	1	115200	Yes

Enroll No.	Registered User	User Privilege	Has PIN ?	Finger Enrolled ?	Active ?
2	Adams,Stephanie - 640	Regular User	No	No	Yes
3	AFFLICK, EVERTON - 1	Regular User	No	No	Yes
4	ALLEN, MARIA - 625	Regular User	No	No	Yes
5	ANDERSON, CRAIG - 398	Regular User	No	No	Yes
6	ANDERSON, RAYON - 262	Regular User	No	No	Yes
7	ASHLEY, LESLIE - 453	Regular User	No	No	Yes
8	BAILEY, CAMILLE - 1006	Regular User	No	No	Yes
9	BAILEY, STACY-ANN - 470	Regular User	No	No	Yes
10	BARRETT, DEZREEN - 641	Regular User	No	No	Yes
11	BARRETT, RACQUEL - 741	Regular User	No	No	Yes
12	BAXTER, ANN-MARIE - 7	Regular User	No	No	Yes
13	BECKY, SHARIKA - 498	Regular User	No	No	Yes
14	BEEPUT, KEVERN - 699	Regular User	No	No	Yes

4.8.7.5 Un-Saved Time Records

This report shows the Enroll Numbers and time data for unregistered scans. These scans were made but no associated employee record found in the database. Often times when the manual registration is done errors are made with the enroll numbers which causes this problem. The administrator of the system can fix this problem.

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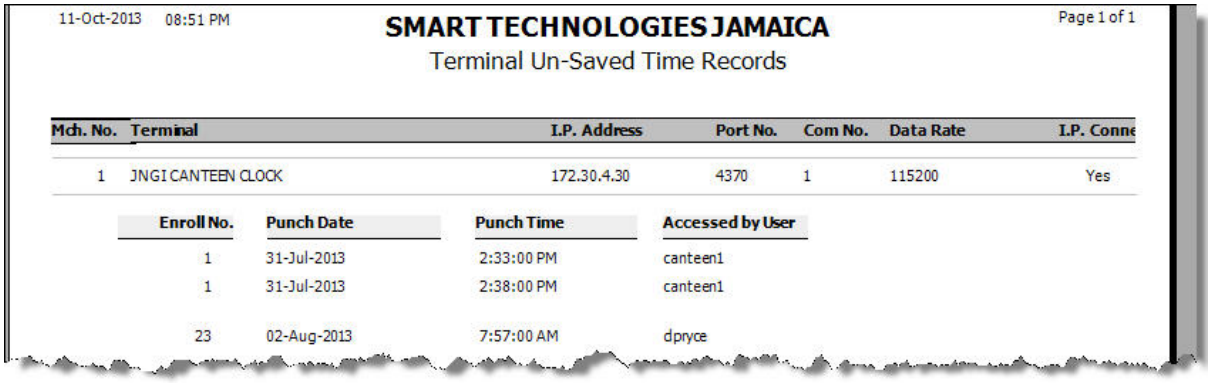
PARAMETERS

This report has no parameters.

REPORT



11-Oct-2013 08:51 PM

SMART TECHNOLOGIES JAMAICA

Terminal Un-Saved Time Records

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Mch. No.	Terminal	I.P. Address	Port No.	Com No.	Data Rate	I.P. Conne
1	JNGI CANTEEN CLOCK	172.30.4.30	4370	1	115200	Yes

Enroll No.	Punch Date	Punch Time	Accessed by User
1	31-Jul-2013	2:33:00 PM	canteen1
1	31-Jul-2013	2:38:00 PM	canteen1
23	02-Aug-2013	7:57:00 AM	dpryce

4.8.8 Time Management Reports

4.8.8.1 Attendance Log Balances

Enter topic text here.

4.8.8.2 Employee Daily Time Sheet

Enter topic text here.

4.8.8.3 Employee Punch Time Log

Enter topic text here.

4.8.8.4 Leave Applicatin Form

Enter topic text here.

4.8.8.5 Punctaulity Ratio Measure

Enter topic text here.

4.8.9 Rostering Reports

Enter topic text here.

4.8.9.1 Employee Master Schedule (Daily)

Enter topic text here.

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4.8.9.2 Employee Monthly Calendar

Enter topic text here.

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5 Reference & Support

To get further assistance for issues not covered by this users manual, please visit the following address:

www.smarttechjm.com, click support and browse our help desk.

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The Duplicate Button 30

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Endnotes 2... (after index)

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