

User Manual for Timekeeper



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1. Introduction

1.1. Introduction to Timekeeper

Timekeeper is the administrative component of RealTime. RealTime is a suite of products designed to simplify and improve Employee Timekeeping. Timekeeper is the core component of the suite, with all other components being enhancements to Timekeeper.

2. Prerequisites

2.1. Prerequisites for Timekeeper

- Internet Access
- A web browser that supports Javascript. While some browsers may format slightly differently, the majority of browsers will work, including:
 - Mozilla Firefox
 - Google Chrome
 - Safari
 - Microsoft Edge
 - Opera Mini
 - Microsoft Internet Explorer
- A valid user ID consisting of 3 components
 - Company number
 - Username
 - Password

3. Workflow

3.1.1. Introduction

This section of the document introduces and explains the expected day-to-day workflow for a manager or supervisor user of Sundial Timekeeper. This is intended to be a streamlined and general overview, rather than a complete manual. For complete and detailed information, the user should refer to the Timekeeper User Manual.

3.1.2. Log In

To log into Sundial Timekeeper, go to the following web site, using any browser:

<https://timekeeper.sundialtime.com>

There, you can enter your company's number, your username, and your password for access to your account.

3.1.3. See Who's In / Who's Out

You can quickly see which employees are currently clocked in and which are clocked out by going to Dashboard, and checking under the Green/White dot. This will show you which employees are currently clocked in (green) or clocked out (white).

Clicking on the green/white dot in the column header will cycle through filter states, i.e., all employees (green/white), only employees who are in (green), and only employees who are out (white).

3.1.4. Check Overtime Status

You can monitor the status of your employees' overtime earnings in Dashboard.

OT warning threshold - This drop-down box will determine the threshold at which your employees' overtime eligible hours will trigger a warning. E.g., if your warning threshold is set to 5, your employees' warning will be triggered at 35 overtime-eligible hours for a typical 40-hour week.

Overtime Bar - The number in the middle represents the total number of hours (overtime eligible or not) the employee has in the current overtime period (which may not be the same as your pay period).

The colored bar represents the overtime eligible hours in proportion to the hours required for overtime. Green indicates that the employee is not earning overtime. Yellow indicates that the employee is within the overtime warning threshold. Red indicates that the employee is earning overtime.

3.1.5. Check for Exceptions

In either Dashboard or in Timecards, you can check to see if your employees' timesheets have any exceptions which must be cleared prior to running payroll. An exception is an error with the employees' time entries, usually a missing punch.

You can quickly see who has an exception on their timecard by checking under the red/white dot. Clicking on the red/white dot in the column header will cycle through filter states, i.e., all employees (red/white), only employees who have exceptions (red), and only employees who have no exceptions (white).

There are no white dots in this column, but a red dot indicates that the employee has an Exception on their timesheet. In Dashboard, the red dot will indicate that the employee has an exception in the current pay period. In Timecards, the red dot will indicate that the employee has an exception in the date range selected.

3.1.6. Clear Exceptions

To clear an exception, double-click on the line containing the employee's name. This will take you to the employee's timesheet. You will see a red dot next to their name on top of the page.

Once there, look for the line reading "Exception" under the Status column. To the right, under Description, you will see the nature of the exception, e.g., "Missing punch."

To add a missing punch, simply double-click on the line reading "Exception," and type in the missing information, and save.

To delete an extraneous punch, hover over the line with the entry you wish to delete, then click on the trash can icon on the right.

Once all exceptions have been removed from the employee's timesheet, the red dot next to their name will disappear. You can move on directly to the next timesheet with an exception by clicking on the drop-down menu and clicking on an entry with a red dot.

3.1.7. Add, Edit, or Delete Punches

You can add punches by going to Dashboard or Timecards and double-clicking on an employee's name. In the employee's timesheet, click the white "+" icon on the far right end of the blue date line. If you clicked on the wrong date, simply type in the correct one in the next screen.

You can also edit punches by double-clicking the line for the entry in the employee's timesheet.

You will be presented with a pop-up screen which gives you several input options.

Type in the timestamp of the entry you wish to enter. If you wish to specify a punch type, you can click on the Transaction Type drop-down list, but Auto should be fine in most cases.

You also have the option of editing the Tracking Level information or leaving a note along with this punch.

To delete a punch, simply hover over the line with the entry you wish to delete, then click on the trash can icon on the right.

3.1.8. Add, Edit, or Delete Hours or Monetary Entries

There are two ways to go about this, through the employee's timesheet in Dashboard or Timecards, or by going to Weekly Entry.

Timesheet - To add or edit an hours or monetary entry, go to the employee's timesheet and add an entry as before. Change the Entry Type to the hours or monetary type you wish to enter. You will be presented with two date boxes. Enter the from and to dates of the range you want the entries to span, and enter the number of hours or dollars for each entry. E.g., if you want to enter a week's vacation for an employee, type in the Monday and Friday's dates in the two date boxes, then enter 8 for the hours you want for each date in that range.

To delete an hours or monetary entry, follow the same steps as above.

Weekly Entry - Please note, you will not see or be able to edit any worked hours in this section.

Select the employee from the drop-down box at the top, then select the state date of the 7-day range you wish to modify. You can also select First Day of Week, if you would prefer the week containing the date you specified, rather than the 7-days starting with that date.

Under Type, select the hours or monetary type you want to add, edit, or delete. Under each day, mark the checkbox to add an entry. You can enter a value in the text box to the right of each checkbox to change the amount.

You can click "Add Row" if you want to enter more than one type of entry.

Remove the check mark if you want to delete an entry.

To commit the changes you have made, click “Apply” at the bottom right. To abandon the changes, click “Undo.”

3.1.9. Approve or Deny Time-Off Requests

In Dashboard, you will see pending time-off requests on the top of the right side of your screen.

To approve or deny time-off requests, go to Time-Off Requests. By default, the Lookback is set to 7 Days, and you will only be shown pending requests. You can change these settings on the right side of the top line.

When you approve a request, the hours will be added to the employee’s timesheet, and if you are using accrual plans, the hours will be deducted from their available amount. If you deny the request, the hours will not be entered in the timesheet, nor deducted from the employee’s balance.

Also, if the employee has an email address on their profile, they will receive a notification of your decision.

You can change the status of a request by editing it. First, reveal previously approved or denied requests by removing the check mark from “Show Pending Only” at the top. Double-click the entries you want to change.

You can also delete requests, which will not add hours, but leave the date open for future requests. You can only delete pending requests. If an entry has already been approved or denied, it must be changed to pending prior to deletion.

3.1.10. Sign Off or Check the Status of a Timecard

To check the status of a timecard, or to sign off on one, go to Timecard Sign-Offs.

There, you can double-click on a line to check the details of the timecard. If you see any exceptions, they should be corrected prior to signing off.

You will see a green check mark under the Employee column if the employee has signed off on their timecard. If a supervisor has signed off on a timecard, you will see a green check mark under that column, along with the date of the sign-off and the supervisor’s name.

You can remove a supervisor's signature from a timecard by selecting the timecard(s) and clicking "Unsign Timecard" at the bottom right. Or you can remove both the employee's and the supervisor's signatures by clicking on "Remove Signatures."

Please note, if you have early sign-offs enabled, any timecards signed off before the end of the pay period will be locked and further punches for the rest of the pay period will not be recorded.

3.1.11. Add or Edit Employees

Use the Employees area to Add or Edit employee records. If the employee you need to edit has been marked Inactive, check the box to "Include Inactive" to include them in the list.

In the first tab (General), include data you may want available such as Address and Emergency Contact information. Also if you have any User Defined Properties, you can specify these now.

In the second tab (Employment), specify any assignments such as Policy, Accrual and Tracking Levels. This tab also includes Hire date, Release date, Compensation and Billing information.

In the third tab (Externals) be sure to include any components that they need for clocking in/out (Clock Identity Pin, Badge Number, Password, WebConnect Login, etc.).

The complete set of instructions for adding new employees, including their clock ID information, can be found online at the following:

<https://sundialtimesystems.freshdesk.com/en/support/solutions/articles/1000223856>

3.1.12. Deactivate Employees

NOTE: Employee records should not be deleted. Doing so will remove all traces of the employee and their history.

Use the Employees area to deactivate employees. To Deactivate, edit the Employee record, and in the first tab (General) uncheck the box "Is Active". Doing this will insert up to two additional fields, "Release Date" and "Clock Identity".

Release Date will default to the current date, but can be modified as needed.

Clock Identity is for you to tell the system how to handle the Employees' clock identity information. The Default is "Remove". This means that the system will remove the employees clock credentials from the database and any connected clocks. "Unassign" means that the clock credentials are left in the system, but disconnected from the Employee record. "Leave" means that the credentials are left in place and the employee could still use the clock to create punches.

3.1.13. Run Reports

You can summarize the data collected into Timekeeper by running a report. We have many report types to choose from, each with its own set of properties and parameters. This will be a general guide for running a report, rather than how to run a specific report.

Go to Reports, and in the Reports drop-down box on the top left, select the type of report you would like to run.

There are three categories available: Saved, Shared, and Common. Saved and Shared are reports customized for special use. Common are the default report types offered in Timekeeper. Instructions for creating your own Saved and Shared reports will follow below.

Once you've selected your report type, select the date range you would like included in this report. Depending on the report type, this may not be applicable, and if so, the Date Range box will be grayed out.

Next, if you do not wish to include every employee in your company (or every employee with data on their timesheet for the date range selected, depending on report type), click "Edit Filters" to add the employees or groups you want included.

In the Employee Filters dialog box, you can select groups of employees, or individual employees to add to the filter. To add groups of employees, first select the Tracking Level from which you will select your groups (e.g., Departments), then select the group (e.g., Administrative), and click "Add." You will see your selections added to the right under Filters."

To add employees to the filter individually, select the employee(s) you wish to add. You can hold down Shift while selecting to choose a range of employees from the list, or hold down Control to pick employees one-by-one. Click "Add" when you have your selection.

You can click "Show inactive items" if you want to add inactive employees to the report.

Once your Filter is set, click OK.

You can use Quick Filter to select a single group of employees for the report.

Next, read the properties for the report, and the options for each property. The names should be fairly self-explanatory, but feel free to experiment, or to reach out to Support if you have doubts.

To save a report and its filter and properties for future use, you can click "Save Report." Give the report a name, and click "Shared" if you want to allow other users (managers and supervisors) access to the same

report. The Date Range must be selected each time you run a report. This is not part of the save function.

Once your settings are to your satisfaction, click on “Show Report.” A second browser window or tab will pop-up, and your information will be presented there. You can browse through the pages of your report, print it, or export it in various file formats.

3.1.14. Export for Payroll

Once you have checked all your employees’ timesheets, and determined that you are ready to process payroll, you have two options: You can export the information in a file format compatible with your payroll software or provider, or you can run a report, and enter the information manually. Both methods have their advantages and disadvantages.

Export file - Advantages: Quicker. May be the only practical option for a company with many employees. Disadvantages: Any unchecked errors will be put through without a last chance for correction.

Report / Manual Entry - Advantages: The entries will be scanned by human eyes before paychecks are cut, so any errors can be spotted before they’re committed to paper. Disadvantages: Slower. For a small company, this is not much of a disadvantage.

To create and export a file for your payroll service or provider, go to Dashboard. Click Export Timecards on the right side of your screen. In the pop-up window, put a check mark under Generate for each Pay Period group you wish to export. If you are not exporting information for the previous pay period, select the date range you do wish to export under Date Range.

Next to Export Type, select [Preset] if you wish to use the default file format attached to each pay period group, or select the file format you do want.

Finally, click “Execute” to prompt the server to create a file. Once done, you will see a “Save Export” button under the Generate column for each pay period group that is ready. Click on this button, and save the file to your local host computer.

The process for importing this file into your payroll software, or sending to your payroll provider, varies and is beyond the scope of this document.

4. Full Manual - Timekeeper

4.1. Logging in to Timekeeper

The Timekeeper login screen allows you to enter login credentials (Company Number, Username and Password) to access your instance.

Navigate your web browser & enter URL (<https://timekeeper.sundialtime.com/>) to access Timekeeper's login screen.

Welcome to RealTime Please log in

Company Number

Username

Password

4.2. Changing the default password at the first log-in

You will be provided with a default credential by your manager, to log-in to the system.

Note : In the event if you don't possess a first time login credential with you, please reach out to your manager for help

Once you enter your first time password, the system will prompt an overlay as shown below, allowing you to change their first time password.

Welcome to RealTime Please log in

Company

U:

P:

Change Password

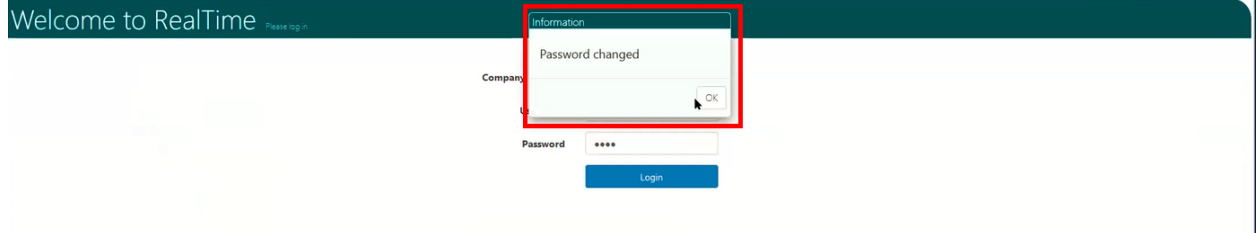
Current Password

New Password

Confirm Password

When the "Change Password" overlay is prompted, you are expected to enter your current password and enter the new password followed with a confirmation.

Upon successful password change, system will prompt a pop-us message as shown below indicating the password has been changed



Upon clicking "Ok" you will be navigated to the home screen of the system.

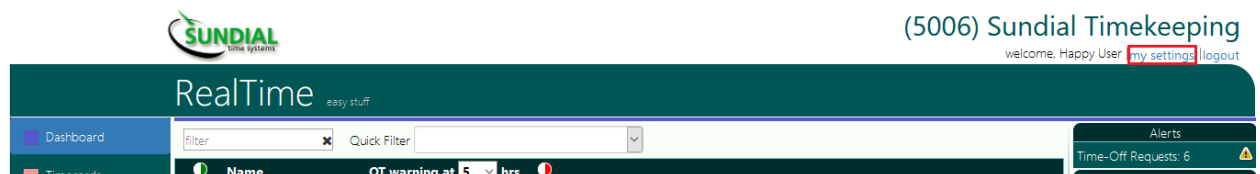
In the event if the "New Password" does not match with the "Confirm password" the system will prompt an error message indicating the password mismatch.

In such cases, once the matching passwords are provided for "New Password" and "Confirm Password" fields, the system will allow you for a password change

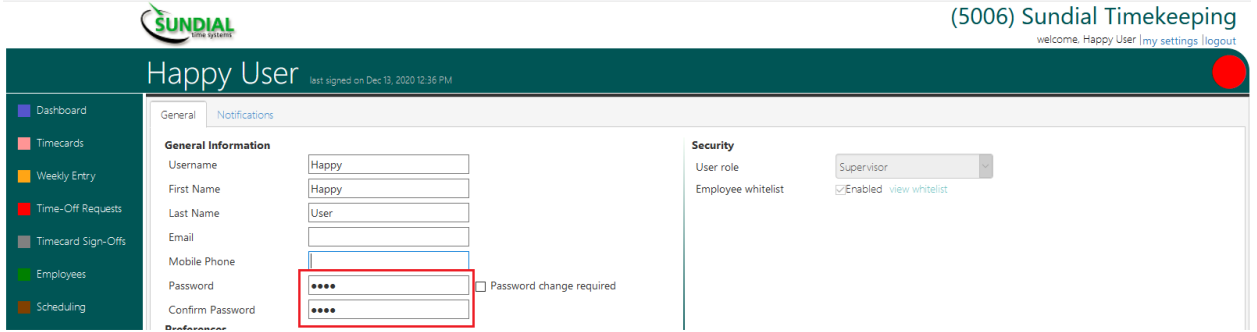
4.3. Resetting the existing password

There may be occasions when users need to reset their existing passwords. Given below are the steps to be followed to reset the password.

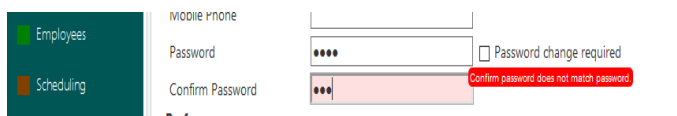
Once logged in to the system, move to the "my setting" section as shown below



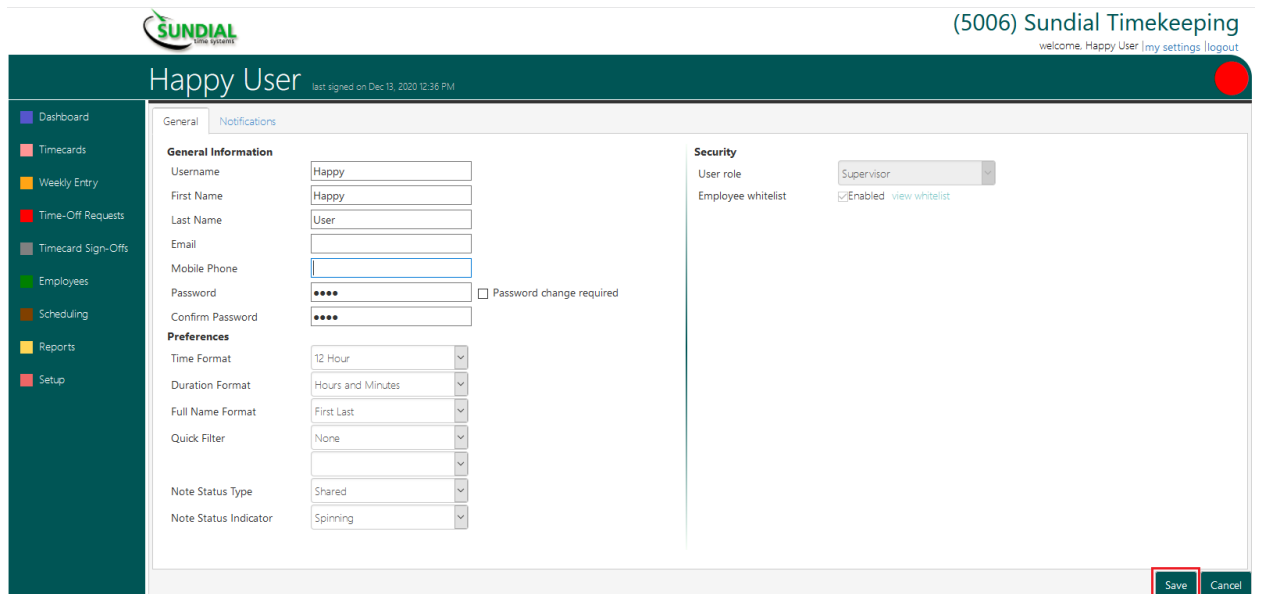
Once clicked, you will be moved to the "my settings" page. Navigate to the password section as indicated below and enter the password you wish to change to, in the "Password" and "Confirm Password" fields



In the event, If both "Password" and "Confirm Password" fields mismatch, then the system would display an error as listed below



If both "Password" and "Confirm Password" fields match, then the system will allow you to reset the password. Please click on the "Save" button to reset it.



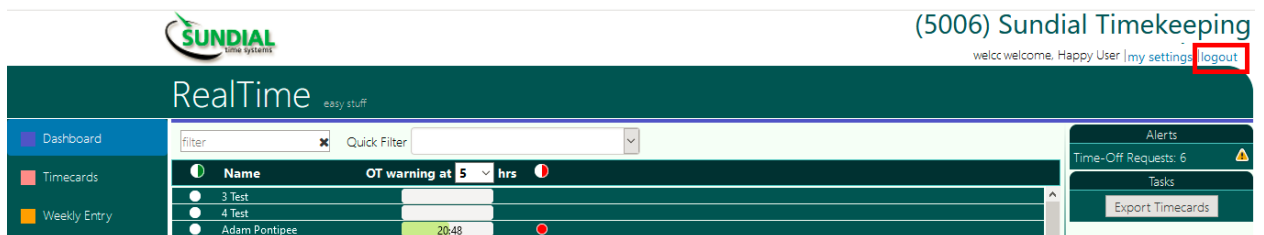
If both "Password" and "Confirm Password" fields match, then the system will allow you to reset the password. Please click on the "Save" button to reset it. Upon clicking "Save" you will be navigated back to the home screen

4.4. Forgot password

In the event if you have forgotten the existing password, you will not be able to self-reset the password via the system. Please ask your manager to reset it, or initiate a support request to Timekeeper support team to get your password reset

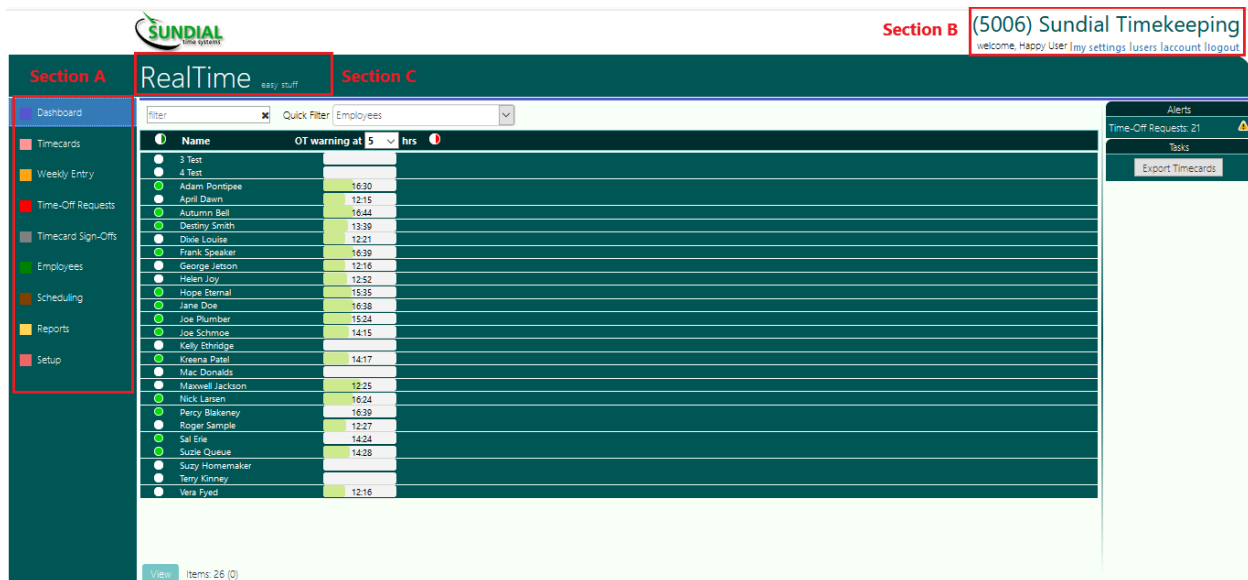
4.5. Logging out from Timekeeper

If you need to log out from the system, you need to move your cursor to the extreme right top of your screen where you find the log out link. Simply clicking on it will log you out and navigate you to the log in screen



5. User Interface of Timekeeper

5.1. Software Convention



Section A is our Primary Navigation - These are the areas that users will commonly need as they use the software. Permissions setting applied by managers may remove specific Navigation options

Section B is the User and Account controls - At the top, the Company Number appears in parenthesis followed by the Company Name. Everyone has access to "my settings" and "logout". Only Users with Manager authority have access to "users" and "account".

Section C is an Informational Area - This section changes depending on what screen the user is viewing. On the Right Side of this area, a large Red Dot will appear to alert the user if there are any unsaved edits.

Visual Indicator on Data changes - Whenever there is a change to a record in the system, there is a “Red Dot” that appears on the right top header of the screen.

This is a visual indicator for any changes that have occurred in the system.

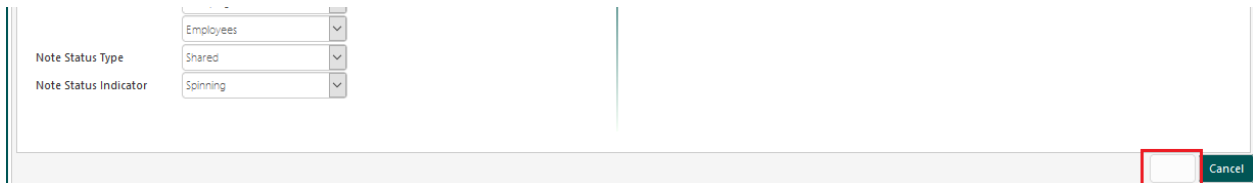


The “Save” option/button on the screen will only be **enabled** in the event of a **change to existing data**. If not, the button will be in a **disabled** state as shown below

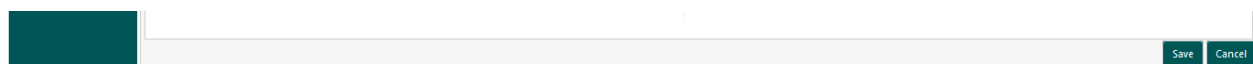
Furthermore, "Save" option/button will not be enabled **until all required fields have entries**. The software can only recognize that a field has been edited, only after the cursor is moved out of the field.

"Save" button will also be **disabled** if any field has **invalid data**.
(i.e. invalid email address entered in an email field or alpha characters entered in a numeric field.)

In the event of multiple tabs for data entry, invalid data entry could reside under any of the other tabs that you aren't currently viewing. In such cases, please check through the other tabs to locate any invalid data which is preventing the save button to come in to the “Enable” state



The “Enabled” state of the “Save” button looks like as shown below



5.2. Terminology

- * Company - The organization that the Users and Employees work for.
- * Client - See Company
- * User - A Manager or Supervisor within the Company that has a Login to Timekeeper
- * Employee - An employee of the Company that has an Employee Record in the Timekeeper software. This person may also have a User account in the software
- * Exception - A situation where the Punches don't make logical sense. Like clocking OUT without clocking IN
- * Punch - a TimeStamp Event that starts or ends a Workspan
- * Workspan - The period of time between a beginning and ending punch
- * Manager - An unrestricted User of the Timekeeper software.
- * Supervisor - A Restricted User of the Timekeeper software. Supervisors are always prevented from accessing the User and Account areas of the software. Additional permissions may also be applied such as restricting Edits, limiting Navigation, and limiting view to only certain Employees and/or Tracking Levels
- * Overtime, OT1, OT - This is a term that refers to any hours worked by an employee that exceed a predefined number of "Regular" hours. The term Overtime is also used to indicate the Pay Premium that is earned for working in excess of the above hours.
- * Double-Time, OT2, DT - This is a term that refers to any hours worked by an employee in excess of a predefined Overtime amount.
- * PTO, Paid Time Off - This usually refers to Paid Time that the employee did not work (i.e. Paid Vacation hours). It can also refer to extra Paid Time that is in addition to an employee's worked hours (i.e. Working on a Holiday AND receiving Holiday Pay)
- * Current Pay Period - A Pay Period is a predetermined number of days that are combined together into a Pay Cycle. The Current Pay Period is the Pay Period with the Date Range that includes the Current Calendar Date.
- * Previous Pay Period - This is the Pay Period that immediately precedes the Current Pay Period.

5.3. Home Screen (Dashboard Area)

5.3.1. General Dashboard

Home screen of the Timekeeper has multiple sections which are intended for different functions. Given below is an explanation of each of these sections

The screenshot shows the Sundial RealTime interface. At the top, it says 'SUNDIAL time systems' and '(5006) Sundial Timekeeping'. Below that, it says 'welcome, Happy User | my settings | users | account | logout'. The main header is 'RealTime' with 'easy staff' below it. On the left is a sidebar with navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main area has a search bar with 'filter' and a dropdown menu set to 'Quick Filter: Employees'. Below this is a table with columns for 'Name', 'OT warning at 5 hrs', and 'hrs'. The table lists 26 employees with their names and overtime hours. A red box highlights the search bar and table headers. Another red box highlights the 'OT warning at 5 hrs' column. A third red box highlights the 'hrs' column. A fourth red box highlights the 'Alerts' and 'Tasks' sections on the right. The bottom of the table has 'Section D', 'Section E', and 'Section F' labels. A 'View' button and 'Items: 26 (0)' are at the bottom left.

Name	OT warning at 5 hrs	hrs
3 Test		
4 Test		
Adam Pontipee	1630	
April Dawn	1215	
Autumn Bell	1644	
Destiny Smith	1339	
Dixie Louise	1221	
Frank Speaker	1639	
George Jetton	1216	
Helen Joy	1252	
Hope Eternal	1535	
Jane Doe	1638	
Joe Plumber	1524	
Joe Schmoie	1415	
Kelly Ethridge		
Kreana Patel	1417	
Max Daniels		
Maxwell Jackson	1225	
Nick Larsen	1624	
Percy Blakeney	1639	
Roger Sample	1227	
Sal Erie	1424	
Suzie Quizee	1428	
Suzy Homemaker		
Terry Kinney		
Vera Fivet	1216	

Section D

This section displays the information of the employees, who are active in the system, or have earnings in the current view

Section E

This section displays the approaching overtime information for each of the employees, according to their configured overtime rules

Section F

This section provides a visual indication of the users, who are part of this system

- Employees with an Exception will have a Red Dot
- Employees that have worked time on a requested day off will have a Yellow Dot
- Employees that have a Note in their Timesheet will have a Note Icon

Section G

The filter is a common list filter available in many areas of the system. This will allow you to filter the listed results within a given page. You can key in the letter/s you wish the records to be filtered from and then the system will display the relevant records accordingly (i.e. - If you wish to see records that has the letter "a" you can simply key in "a" and the system will only display scuh records which has the letter "a"

The QuickFilter is a common section that will instantly swap one group for another. QuickFilters are based on the User applying a "QuickFilter" Tracking Level (located in "my settings" on the upper right). Once a QuickFilter Level is specified, the User needs only to select one of the Items in that level to change their view to include only the employees that are assigned to the selected Tracking Item. Value specified for the QuickFilter will be maintained during the User session until modified again or logged out.

Section H

This will alert Users if there are unresolved Time Off Requests.

Section I

This section is where you find the Payroll Export tools. Exporting Data is normally done at the end of each Pay Period, after any Edits and Adjustments have been completed.

5.3.2. Going into Timesheet

When you double click on any person listed in the dashboard, you will be navigated to their time sheets.

Double click on the name of the person as shown below

The screenshot shows the SUNDIAL RealTime dashboard. At the top right, it says "(5006) Sundial Timekeeping" and "welcome, Happy User | my settings | users | account | logout". The main header is "RealTime easy stuff". On the left is a navigation menu with items like Dashboard, Timecards, Weekly Entry, Time-Off Requests, and Timecard Sign-Offs. The main area has a "filter" box and a "Quick Filter" dropdown set to "Employees". Below this is a table of employees with columns for Name, OT warning at, and hrs. The "OT warning at" column shows values like 34:47, 32:24, 34:54, 36:08, 34:33, 38:06, 31:34, and 34:52. The "hrs" column has a red indicator. The name "Hope Eternal" is highlighted in red in the Name column.

Once double clicked, you will be navigated into the selected user's time. Typically timesheet of a user would look like as shown below

The screenshot shows the SUNDIAL Hope Eternal timesheet. At the top right, it says "(5006) Sundial Timekeeping" and "welcome, Happy User | my settings | users | account | logout". The main header is "Hope Eternal viewing timecard". On the left is a navigation menu with items like Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main area shows a table of time entries for the user "Hope Eternal" for the "Current Pay Period". The table has columns for Status, Reg, OT1, OT2, Total, Diff, Amount, and Description. The entries are grouped by day: Mon 12/7, Tue 12/8, Wed 12/9, and Thu 12/10. Each day shows "In" and "Out" times, "LunchLeave" and "LunchReturn" times, and "Daily Totals". The "Totals" row at the bottom shows: Totals: 71:36, 1:10, 72:46. There is a "Close" button at the bottom right.

5.3.3. Pay Periods in Timesheet

When accessing the Timesheet through the Dashboard, the Timesheet will display for the **Current Pay Period** as shown below. (Accessing Timesheet from another area, such as the Timecards area, the Timesheet Date Range will match whatever was specified in previous view)

The screenshot shows the Sundial Timekeeping interface for user Hope Eternal. The top right corner displays '(5006) Sundial Timekeeping' and a welcome message. The main content area shows a timesheet for the 'Current Pay Period'. The table below summarizes the data shown in the screenshot:

Date	Status	Reg	OT1	OT2	Total	Diff	Amount	Description
Mon 12/7	6:56 AM In							
	11:01 AM LunchLeave	4:05			4:05			
	12:02 PM LunchReturn							
	4:13 PM Out	4:11			4:11			
	Daily Totals:	8:16			8:16			
Tue 12/8	6:50 AM In							
	10:59 AM LunchLeave	4:09			4:09			
	11:59 AM LunchReturn							
	4:03 PM Out	4:04			4:04			
	Daily Totals:	8:13			8:13			
Wed 12/9	6:57 AM In							
	11:00 AM LunchLeave	4:03			4:03			
	12:01 PM LunchReturn							
	4:15 PM Out	4:14			4:14			
	Daily Totals:	8:17			8:17			
Thu 12/10	6:57 AM In							
	Totals:	71:36	1:10		72:46			

If you wish to see the timesheet for the previous pay period, you can do it by clicking on the “Current Pay Period” button. Clicking it would load an overlay with the selection options for the previous pay periods.

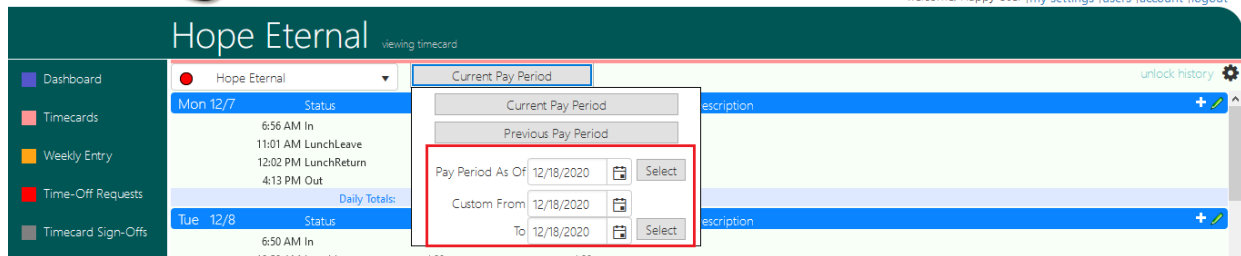
The screenshot shows the Sundial Timekeeping interface for user Hope Eternal. A modal window is open over the timesheet, allowing the user to select a different pay period. The modal contains the following options and fields:

- Buttons for "Current Pay Period" and "Previous Pay Period".
- Field "Pay Period As Of" with a date picker set to 12/18/2020 and a "Select" button.
- Field "Custom From" with a date picker set to 12/18/2020 and a "Select" button.
- Field "To" with a date picker set to 12/18/2020 and a "Select" button.

In addition to this, the system also allows you to select time sheets on various other options as listed below

- Pay Period As Of
- Custom “From” & “To” period

Using these options, you will be able to view timesheets for any period you need




5.3.4. General Timesheet

The time sheet displays time punch activities related to the selected user.

Following fields are displayed by default for any timesheet.

- 1 - Day (Displayed as "Sun, Mon,Tue,Wed,Thu,Fri,Sat)
- 2 - Date (Displayed in the MM/D format)
- 3 - Status
 - 3.1(This section displays the information on it & out times and any differences or exceptions" -
 - 3.2 Exceptions are displayed in "**Red**"
 - 3.3 Employees with Exceptions also have a "**Red dot**" in the drop down selector
- 4 - **Reg** (Amount of hours attributed to the "Regular" rate of pay)
- 5 - OT1 (Amount of hours attributed to Overtime)
- 6 - OT2 (Amount of hours attributed to Double-Time) - would be used if there are multiple overtime rates defined as per organizational policy or state law
- 7- Total (Total hours attributed to the Punch Pair duration)
- 8 - Diff (The number of hours that qualify for Differential)
- 9 - Amount (Monetary Amounts from Differential or Monetary Records)
- 10 - Description (this will display any description related to the Punch or Punch Pair. Examples include exceptions, hours records, monetary records and differentials)
- 11 - Totals (This displays the total number of hours in a timesheet)
- 12 - Close (Clicking on the "**close button**" will close the timesheet)

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout



Hope Eternal

viewing timecard

unlock history ⚙️

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

● Hope Eternal 3.3
Current Pay Period
unlock history ⚙️

Mon 12/14		Status	Reg	OT1	OT2	Total	Diff	Amount	Description
1	2	6:58 AM In							
		11:00 AM LunchLeave	4:02			4:02			
		12:02 PM LunchReturn							
		4:01 PM Out	3:59			3:59			
Daily Totals:			8:01			8:01			
Tue 12/15		Status	Reg	OT1	OT2	Total	Diff	Amount	Description
		6:49 AM In							
		11:01 AM LunchLeave	4:12			4:12			
		12:02 PM LunchLeave	1:01			1:01			Unexpected punch type
		4:14 PM Out							Exception Missing punch -3.2
Daily Totals:			5:13			5:13			
Wed 12/16		Status	Reg	OT1	OT2	Total	Diff	Amount	Description
		6:59 AM In							
		10:59 AM LunchLeave	4:00			4:00			
		11:59 AM LunchReturn							
		4:02 PM Out	4:03			4:03			
Daily Totals:			8:03			8:03			
Totals:			71:43	1:10		72:53			11

12 Close


5.3.5. Editing the Timesheet

You can edit the timesheet line items if you have sufficient permissions. In the event you are unable to edit the timesheet, please speak to your manager for help.

There are two methods using which the timesheet can be edited.

Method 1 - by double clicking on the timesheet line item as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout



Hope Eternal

viewing timecard

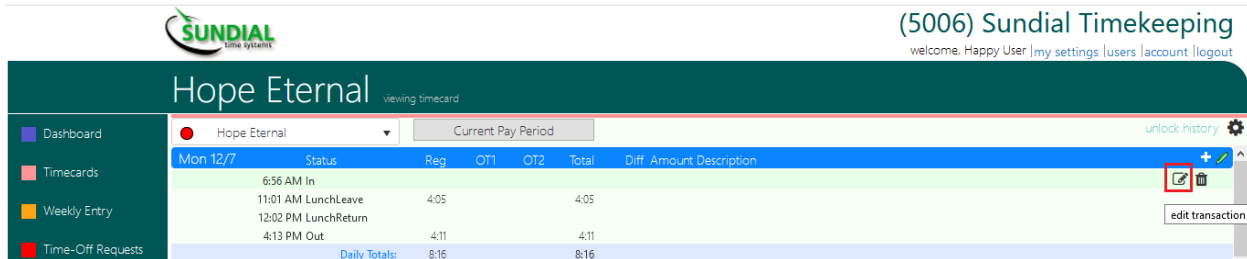
unlock history ⚙️

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests

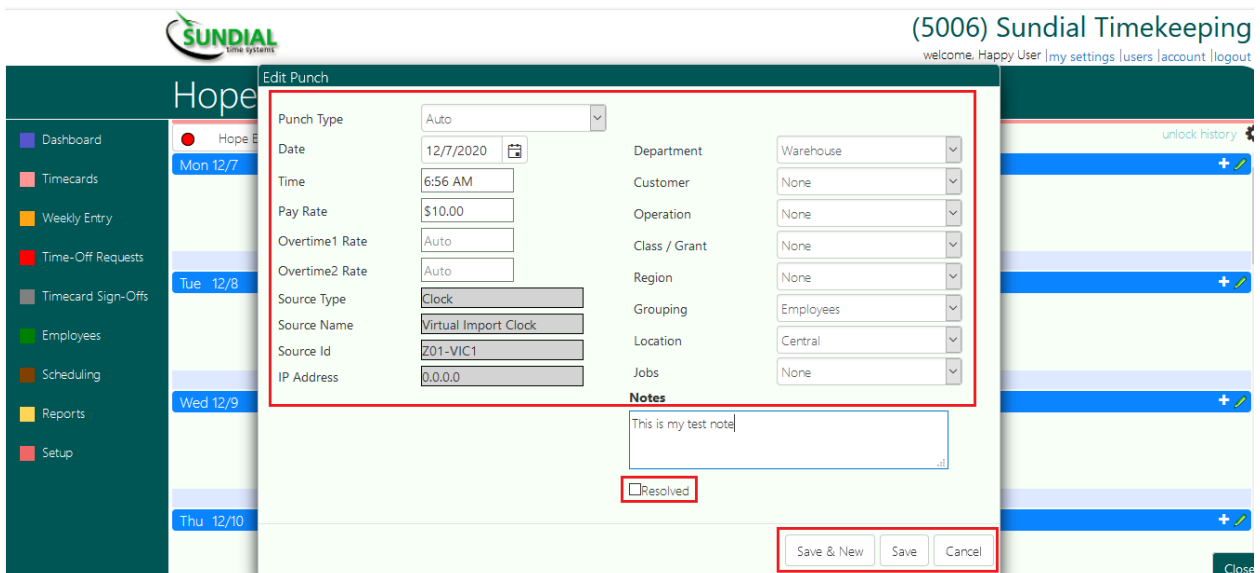
● Hope Eternal
Current Pay Period
unlock history ⚙️

Mon 12/7		Status	Reg	OT1	OT2	Total	Diff	Amount	Description
		6:56 AM In							
		11:01 AM LunchLeave	4:05			4:05			
		12:02 PM LunchReturn							
		4:13 PM Out	4:11			4:11			
Daily Totals:			8:16			8:16			
Tue 12/8		Status	Reg	OT1	OT2	Total	Diff	Amount	Description

Method 2 - by clicking the “Edit” icon on the timesheet line item as shown below



System will allow you to edit the timesheet using either method shown above. When the line item record is in the edit mode, it will show up a pop-up/overlay as shown below



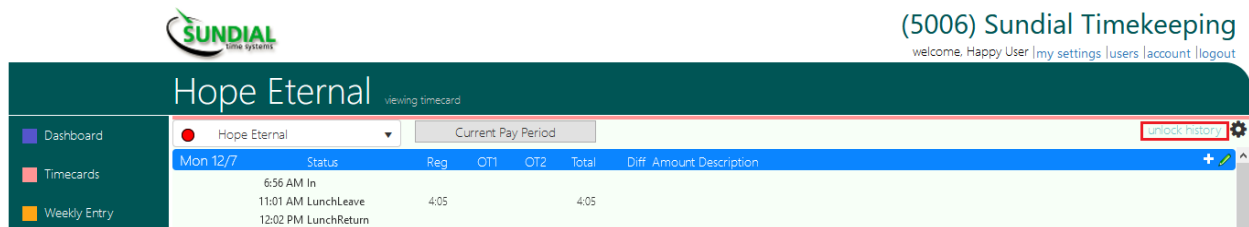
Each of the dropdowns displayed will have different values which you can choose from. Furthermore, you can add a note to the edited section in the “Notes” section as shown below. This can be added by both employees and managers.

Note : In the event, if these sections on the pop-up/overlay are not visible to you, or you are unable to edit, it means that you do not have the necessary authorization (permissions) to do so. In such events, please reach out to your manager for support.

5.3.6. Unlocking the History (For any period earlier than “Previous Period”)

Generally the time sheets are locked after the allowed editable period. (i.e. - if the time is captured for the current pay period, editing a punch time which is older than the previous pay period will be locked. In the event if you wish to edit some record of the past, you will need to click on the “**unlock history**” button.

If the unlock the history option isn’t available, it means that you are not granted the required authority to do so. If unlock history is unavailable, please open a support ticket with your software provider to have the ability enabled.



Once the history is unlocked, you will be able to edit past records of the timesheet

5.3.7. Understanding the edit punch pop-up/overlay

The “Edit Punch” pop-up/overlay has the below listed items that are captured on a time punch & most of them are editable. Given below is a detailed description on each of the items that gets captured on a time punch

SUNDIAL time systems

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Hope E

Mon 12/7

Tue 12/8

Wed 12/9

Thu 12/10

unlock history

Close

Edit Punch

Punch Type: Auto

Date: 12/7/2020

Time: 6:56 AM

Pay Rate: \$10.00

Overtime1 Rate: Auto

Overtime2 Rate: Auto

Source Type: Clock

Source Name: Virtual Import Clock

Source Id: Z01-VIC1

IP Address: 0.0.0.0

Department: Warehouse

Customer: None

Operation: None

Class / Grant: None

Region: None

Grouping: Employees

Location: Central

Jobs: None

Notes: This is my test note

Resolved

Save & New Save Cancel

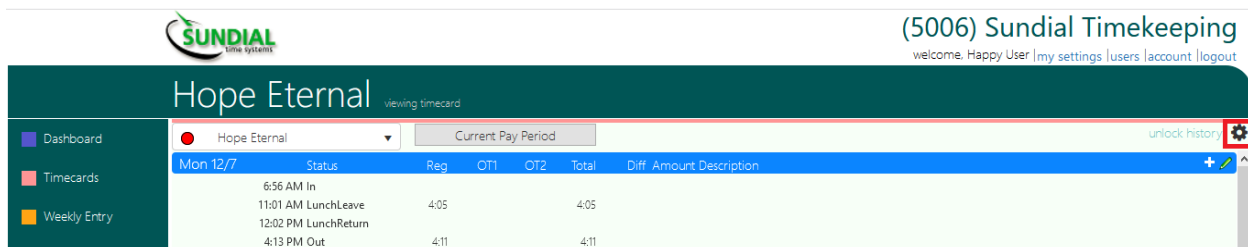
<p>Punch Type</p>	<p>“Punch type” drop down will have the following values which you can choose from, when you wish to edit, based on the authorizations that you have</p> <p>Auto, Switch, In, Out, Lunch Leave, Lunch Return, Break Leave, Break Return, New Shift</p> <p>Auto: This type of punch allows the System to automatically determine the type based on rules and neighboring punches.</p> <p>Switch: This type allows an employee to change tasks without clocking out. (Switch Departments, for instance).</p> <p>In: This always begins an “On Clock” period. It can be the Start of Shift or a Return from Lunch or Break.</p> <p>Out: This always begins an “Off Clock” period. It can be the End of Shift, Lunch Leave or Break Leave.</p> <p>Lunch Leave: This is an explicit punch that begins an “Off Clock” period for Lunch.</p> <p>Lunch Return: This is an explicit punch that ends a Lunch period and begins an “On Clock” period.</p> <p>Break Leave: This is an explicit punch that begins an “Off Clock” period for Break.</p> <p>Break Return: This is an explicit punch that ends a Break period and begins an “On Clock” period.</p>
-------------------	---

	New Shift: This is a special Type that will begin a new “On Clock” period. If the Employee is already “On Clock”, it will end the previous “On Clock” period and start a new one.
Date	“ Date ” field has a calendar option which allows you to choose a date
Time	“ Time ” field allows you to edit the time record
Pay Rate	“ Pay rate ” displays your defined pay rate per hour
Overtime Rate 1	“ Overtime1 ” This is where you could Override the system overtime rate
Overtime Rate 2	“ Overtime2 ” This is where you can Override the system Double-Time rate
Source Type	“ Source Type ” is the clock or time tracking device that is used to capture your time punches
Source Name	“ Source Name ” is name associated to the time tracking device that captured the Punch
Source ID	“ Source ID ” is the Identification that is assigned to the device that captured the Punch
IP Address	“ IP Address ” is the associated IP address of the device that captured the Punch
{Name Varies} Tracking Level 1	Drop down has the different items available to Tracking Level 1 - Tracking Level name will vary according to your company
{Name Varies} Tracking Level 2	Drop down has the different items available to Tracking Level 2 - Tracking Level name will vary according to your company
{Name Varies} Tracking Level 3	Drop down has the different items available to Tracking Level 3 - Tracking Level name will vary according to your company
{Name Varies} Tracking Level 4	Drop down has the different items available to Tracking Level 4 - Tracking Level name will vary according to your company
{Name Varies} Tracking Level 5	Drop down has the different items available to Tracking Level 5 - Tracking Level name will vary according to your company
{Name Varies} Tracking level 6	Drop down has the different items available to Tracking Level 6 - Tracking Level name will vary according to your company
{Name Varies} Tracking Level 7	Drop down has the different items available to Tracking Level 7 - Tracking Level name will vary according to your company

{Name Varies} Tracking Level 8	Drop down has the different items available to Tracking Level 8- Tracking Level name will vary according to your company
Notes	“Notes” section allows entering notes pertinent to the time punch. This can be entered both by Users (you and other managers or supervisors) or by the Employee
Resolved “Check-box”	“Resolved” check-box allows to check based on whether or not the notes are resolved

5.3.8. Adding additional tracking levels to the Timesheet

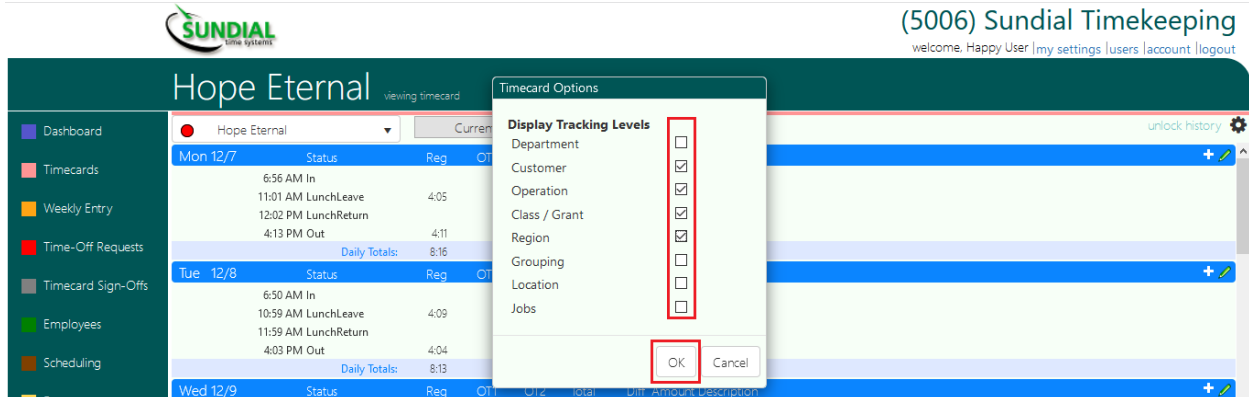
You can click on the Gear lever icon on the extreme top- right of your timesheet to add additional tracking levels to the timesheet as shown below



When you click on this, system will display a pop up/overlay with other available tracking levels as shown below

By clicking on the “check-boxes” on the overlay, you will be able to add additional tracking levels to the timesheet

Once the required additional tracking levels are checked, please click on the “Ok” button to enable them in the timesheet



5.4. Timecards Area

5.4.1. Going into Timecards

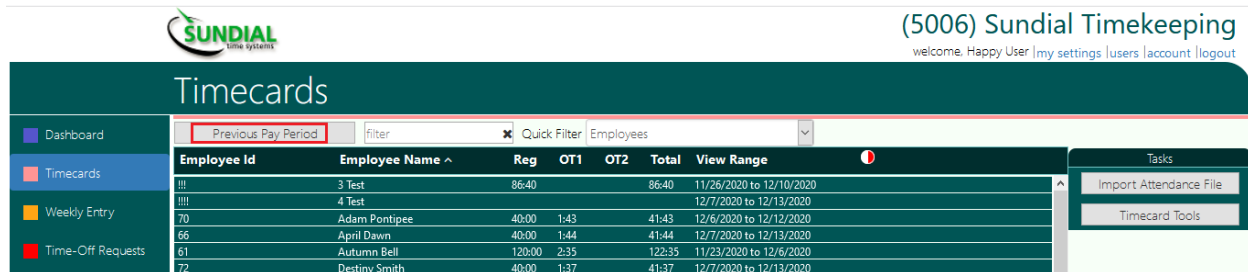
When you click on “Timecards” on the Primary Navigation (Section A), you will be navigated to the “Timecards” section as shown below



Timecard is more like a summary view of the timecards that are shown under the current selected pay period.

5.4.2. Pay Periods in Timecards

The default Pay Period offered is dependent on the “Look-Back Window” value in your company settings. Whatever that value is dictates the number of days that the software will default to the “**Previous Pay Period**”. After the specified days have elapsed, the view will default to the “**Current Pay Period**”.



(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Timecards

Previous Pay Period filter Quick Filter Employees

Employee Id	Employee Name ^	Reg	OT1	OT2	Total	View Range
!!!	3 Test	86:40			86:40	11/26/2020 to 12/10/2020
!!!	4 Test					12/7/2020 to 12/13/2020
70	Adam Pontipee	40:00	1:43		41:43	12/6/2020 to 12/12/2020
66	April Dawn	40:00	1:44		41:44	12/7/2020 to 12/13/2020
61	Autumn Bell	120:00	2:35		122:35	11/23/2020 to 12/6/2020
72	Destiny Smith	40:00	1:37		41:37	12/7/2020 to 12/13/2020

Tasks
Import Attendance File
Timecard Tools

5.4.2.1. Look Back Window Rule for Timecards

There is a rule in the company settings as “Look Back Window”. This rule determines, this rule determines when the software will default to *Previous* or *Current*.

On the Dashboard, software is always **current period**. This means that if you double click an employee from there, it will go to that employees **current timesheet**.

However, when it comes to the the **Timecards and Reports** views, the software will check the **Look-back Rule**.

In the above screen shot, you see the Timecard is loaded for the Previous Pay Period by default. This is simply because, the account taken for illustration is set up with a **5 day look-back**

That means that, when a **new period** starts, software will default to the **previous period for 5 days**. On the 6th day and later, it will default to the current period

5.4.3. General Timecard

Employee Id	Employee Name	Reg	OT1	OT2	Total	View Range
66	April Dawn	29:11			29:11	12/7/2020 to 12/13/2020
61	Autumn Bell	120:00	2:35		122:35	11/23/2020 to 12/6/2020
72	Destiny Smith	28:25			28:25	12/7/2020 to 12/13/2020
64	Dixie Louise	29:05			29:05	12/7/2020 to 12/13/2020
77	Frank Speaker	28:23			28:23	12/7/2020 to 12/13/2020
71	George Jetson	28:50			28:50	12/7/2020 to 12/13/2020
70	Helen Ivy	30:52			30:52	12/7/2020 to 12/13/2020

Section A

This section displays the “Employee ID” of the listed employees

Section B

This section displays the “Employee Names” of the listed employees

Section C

This section displays the “Total current hours”

Section D

This section displays the “Total OT 1 hours”

Section E

This section displays the “Total OT 2 hours”

Section F

This section displays the “Total Hours” that will be an addition of Columns “:Reg”+“OT1”+ “OT2”

Section G

This section shows the selected “view range” of the displayed records

Section H

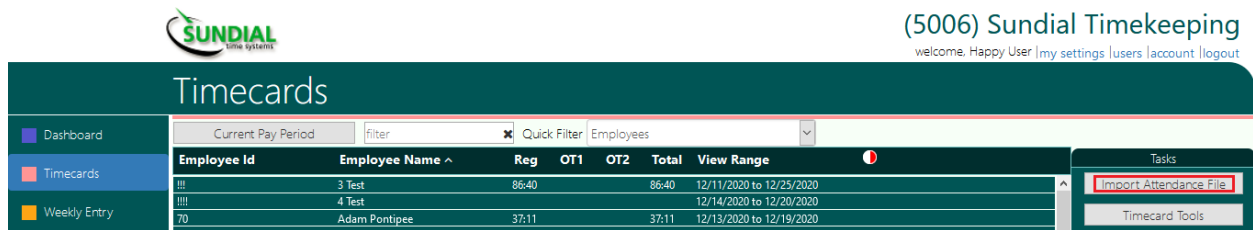
The filter is a common list filter available in many areas of the system. This will allow you to filter the listed results within a given page. You can key in the letter/s you wish the records to be filtered from and then the system will display the relevant records accordingly (i.e. - If you wish to see records that has the letter “a” you can simply key in “a” and the system will only display scuh records which has the letter “a”

The QuickFilter is a common section that will instantly swap one group for another. QuickFilters are based on the User applying a “QuickFilter” Tracking Level (located in “my settings” on the upper right). Once a QuickFilter Level is specified, the User needs only to select one of the Items in that level to change their view to include only the employees that are assigned to the selected Tracking Item. Value

specified for the QuickFilter will be maintained during the User's session until modified again or logged out.

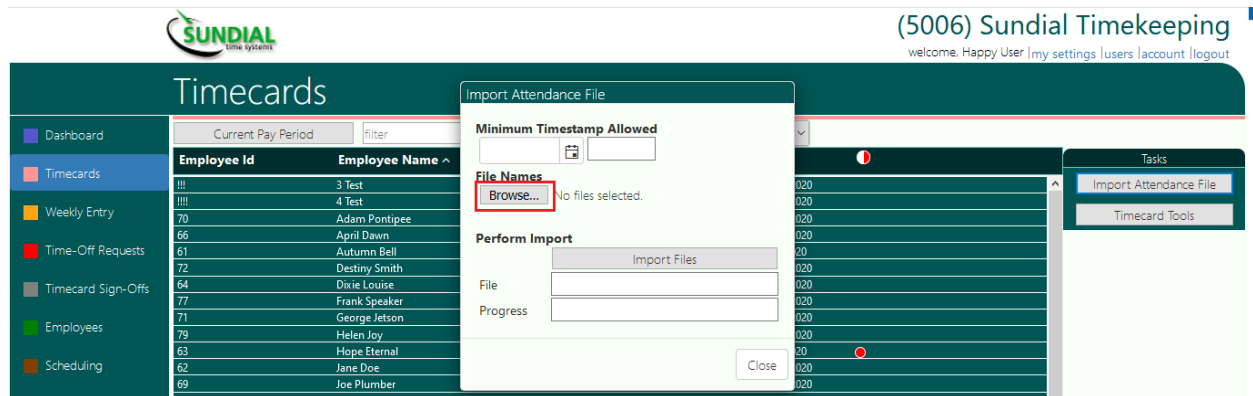
5.4.4. Importing Attendance File

System allows you to import attendance files from an external clock. In order to do this, you need to click on the "Import Attendance File" button on the system that is listed under "Tasks" as shown below



Once you click on it, the system will display a pop up as shown below.

The Minimum Timestamp Allowed setting allows you to ensure that only data after a specified point in time will be processed. Usually you can ignore these fields.



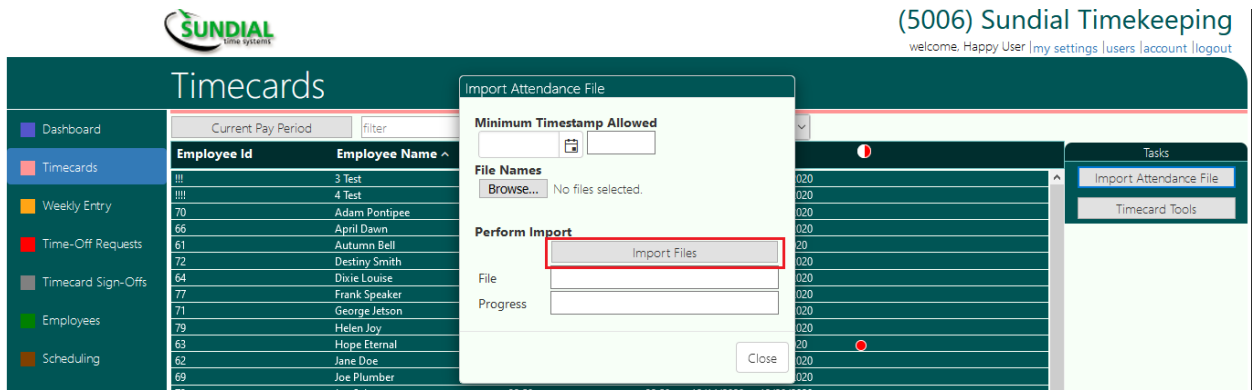
You can click on "Browse" to locate the file in your computer. The name convention of the file downloaded from a physical Timeclock will be as follows

{clock serial number}_attlog.dat

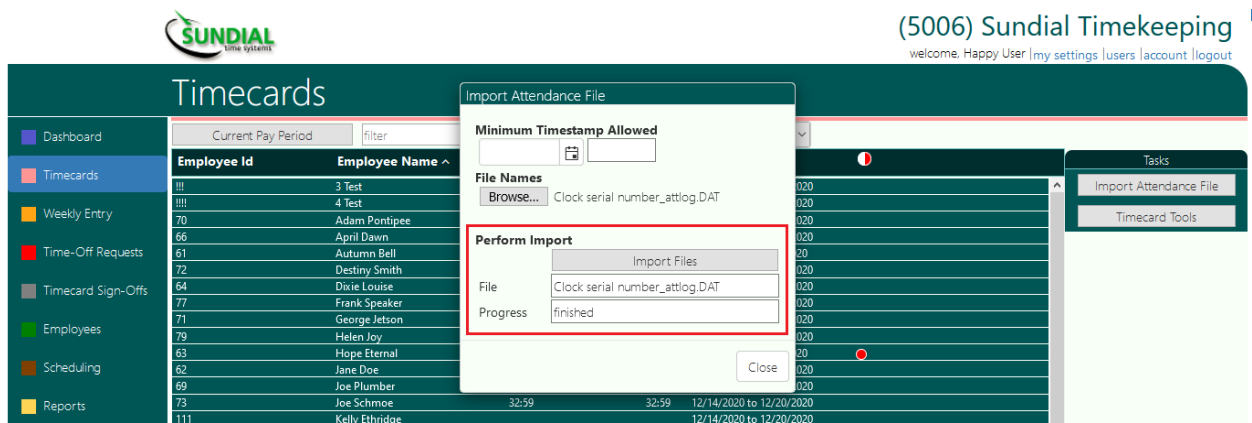
or

{device id}_attlog.dat

Once the file is selected, click on the "Import Files" button as shown below



Once it's successfully imported, the system will display a message as shown below



5.4.5. Timecard tools

Timecard tools will allow you to carry out any bulk changes / assignments for any / all active employees in the system, which may be desired following a modification of Employee Pay Rates or Tracking Assignments. These bulk changes / assignments could be applicable from any date range from the start of Previous Period though any point in the future.

Example:

Suppose, there is a pay rate change for an existing employee, and those changes need to be applied retroactively, timecard tools assist you in applying this bulk change over the relevant period of time.

To carry out such changes you can click on the **“Timecard Tools”** button on the right side of the screen, as shown below

Timecards

Previous Pay Period

Quick Filter
Employees

Employee Id	Employee Name	Reg	OT1	OT2	Total	View Range
!!!	3 Test	86:40			86:40	11/26/2020 to 12/10/2020
!!!!	4 Test					12/7/2020 to 12/13/2020
70	Adam Pontipee	40:00	1:43		41:43	12/6/2020 to 12/12/2020
66	April Dawn	40:00	1:44		41:44	12/7/2020 to 12/13/2020

Tasks

Import Attendance File

Timecard Tools

Once you click on the “Timecard tools” button, a dialog screen is presented as shown below

(5006) Sundial Timekeeping

Happy User | my settings | users | account | logout

Bulk Assign Tracking Levels

Quick Filter: Employees

Employees

- 3 Test
- 4 Test
- Adam Pontipee
- April Dawn
- Autumn Bell
- Destiny Smith
- Dixie Louise
- Frank Speaker
- George Jetson
- Helen Joy
- Hope Eternal
- Jane Doe
- Joe Plumber

select all / none

Applies To

Punches

Hours

Vacation

PTO

Unpaid

Holiday

Personal

Custom8

Worked -

Sunday

Regular

Monetary

Pick

Commission

Bonus

Meals (ded)

Mileage

Hourly rates

Meeting Bonus

Piecework

Sales Bonus

New Type

Date Range

Current Pay Period

Tracking Levels to Assign

Department: Unchanged

Customer: Unchanged

Operation: Unchanged

Class / Grant: Unchanged

Region: Unchanged

Grouping: Unchanged

Location: Unchanged

Jobs: Unchanged

Include modified (not employee default)

Adjust Pay Rate

Assign Tracking Levels

Close

Given below are the different checkboxes that you will find in the “Bulk Assign Tracking Levels” dialog window as shown below under the different sections

Bulk Assign Tracking Levels

Quick Filter: Employees

Section A

- Employees**
- 3 Test
 - 4 Test
 - Adam Pontipee
 - April Dawn
 - Autumn Bell
 - Destiny Smith
 - Dixie Louise
 - Frank Speaker
 - George Jetson
 - Helen Joy
 - Hope Eternal
 - Jane Doe
 - Joe Plumber
- select all / none

Applies To

Punches

Hours	Monetary
<input checked="" type="checkbox"/> Vacation	<input type="checkbox"/> Pick
<input checked="" type="checkbox"/> PTO	<input type="checkbox"/> Commission
<input checked="" type="checkbox"/> Unpaid	<input type="checkbox"/> Bonus
<input checked="" type="checkbox"/> Holiday	<input type="checkbox"/> Meals (ded)
<input checked="" type="checkbox"/> Personal	<input type="checkbox"/> Mileage
<input checked="" type="checkbox"/> Custom8	<input type="checkbox"/> Hourly rates
<input type="checkbox"/> Worked -	<input type="checkbox"/> Meeting Bonus
<input checked="" type="checkbox"/> Sunday	<input type="checkbox"/> Piecework
<input checked="" type="checkbox"/> Regular	<input type="checkbox"/> Sales Bonus
	<input type="checkbox"/> New Type

Date Range

Current Pay Period

Tracking Levels to Assign

Department: Unchanged

Customer: Unchanged

Operation: Unchanged

Class / Grant: Unchanged

Region: Unchanged

Grouping: Unchanged

Location: Unchanged

Jobs: Unchanged

Include modified (not employee default)

Adjust Pay Rate

Assign Tracking Levels

Section B

Section C

Section D

Close

Section A - Quick Filter

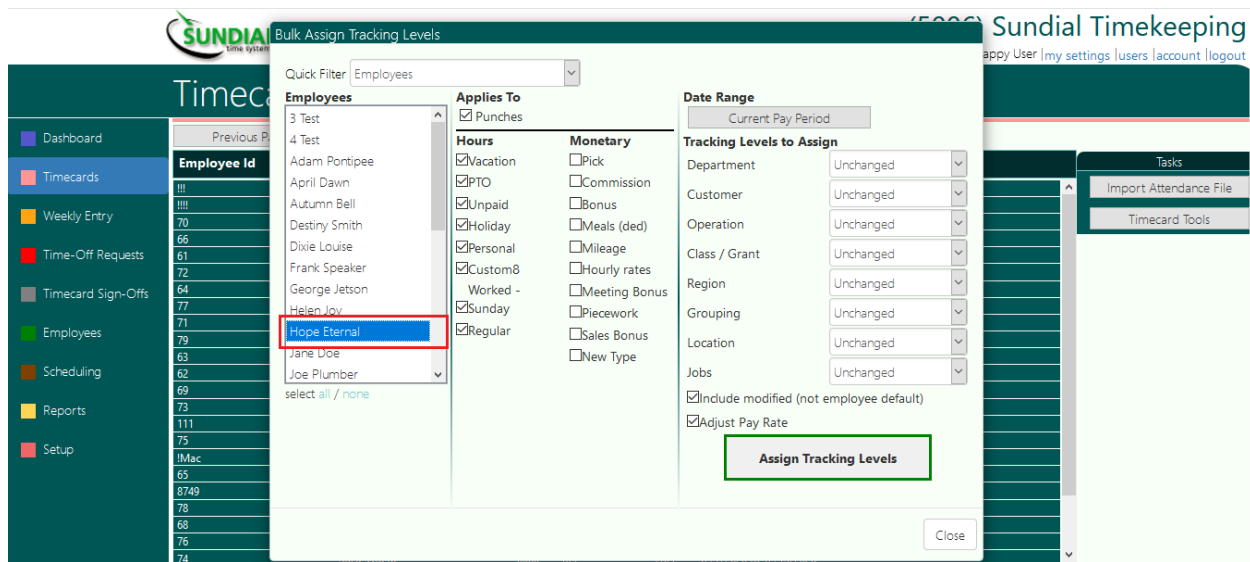
Use this to quickly select your predefined employee subsets

Section B - Employees

Once the “Timecard tools” pop-up/overlay is displayed, you can select the relevant employee from the leftmost panel, by simply clicking on their name as shown below.

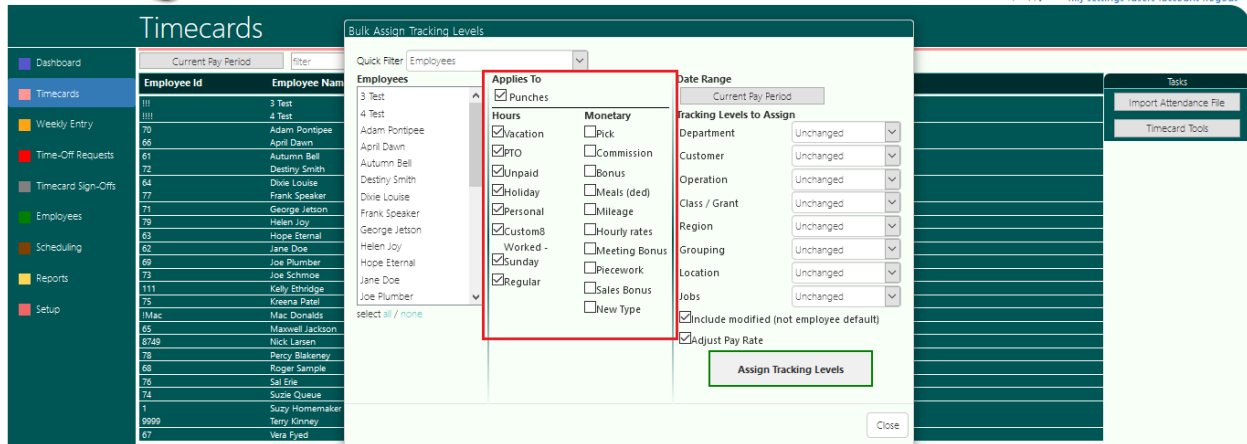
System also allows you to select multiple employees using 3 different types of selects which involves a combination of keys as shown below. Currently the system supports the following multi select options.

- **Shift + Click** (Selects Last Click to Current Click)
- **Control + Click** (Adds or Removes Clicked Selection)
- **Control+Shift + Click** (Adds Group from Previous Click to Current Click)



Section C - Applies to

This section has Check boxes which you check/uncheck based on the areas the bulk assignments are related to as shown below



The check boxes under this section are grouped as below

Applies to

[Checkbox] Punches : This will be checked by default. This indicates that the bulk assignments will be applied for the punches of the selected user/users

Applies to : Hours

[Checkboxes] Hours Types : These will be checked by default. Having this checked means that bulk assignments will update any of the selected Hours Type records found in the employee's timesheet(s). Your own Hours Type names will vary depending on your company.

Applies to : Monetary

[Checkboxes] Monetary Types : These will be un-checked by default. Having this checked means that bulk assignments will update any of the selected Monetary Type records found in the employee's timesheet(s). Your own Monetary Type names will vary depending on your company.

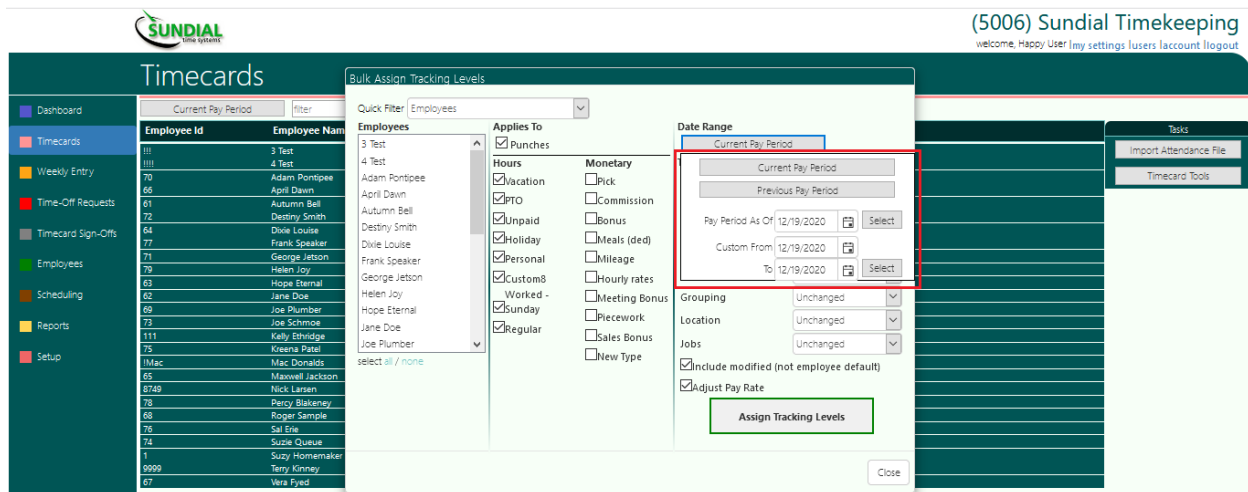
Section D - Actions to Perform

Use this section to guide the system on what actions to perform when you click “Assign Tracking Levels”

Date Range

This section has the “**Current Pay Period**” as shown below. When you click on it, it will load a small pop-up/overlay as shown below

See "Date Range Selector" in Software Conventions for more details



Tracking Levels to Assign

Specify any tracking level items you wish the system to modify. You can also specify “Unchanged” and “Employee Default”

Checkbox : Include Modified

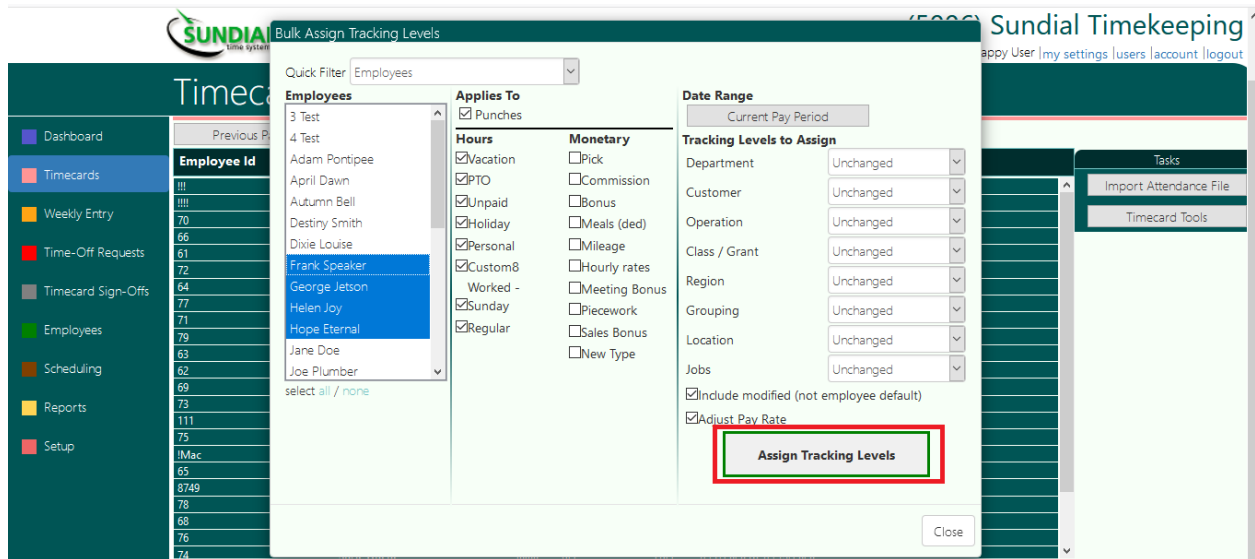
Check this box to update Tracking Levels that have been modified previously. “Modified” test is whether or not the current assignment matches the employee default.

CheckBox ; Updated Pay Rate

After applying any Tracking Level changes, the system can also apply Pay Rate Changes based on Employee’s current rate and any modifiers warranted by an Alternate Rate linked to the Tracking Item assigned.

Executing the Bulk Assignment function

Once the relevant checkboxes are checked, you can click on the “Assign Tracking Levels” button to run the bulk assignments as shown below



Note : For Bulk Changes, they often apply to all record types, such as Holiday, Vacation, Sick, etc. This is common for Pay Rate changes.

For some bulk reassignments, it only applies to Worked Time, or may only apply to Time Off Records.

(An example would be a company that does Job Costing and the Work hours are already allocated to specific tasks. Imagine that this employee has been re-assigned to a different department, but the reassignment only applies to Time Off Records. This tool can update approved Time Off to the newly assigned department, including those that were already approved but the time off is still in the future (like an approved vacation that starts next July).

Once this is done, you can click on the “Close” button to close the bulk changes/assignments dialog.

Bulk Assign Tracking Levels

Quick Filter: Employees

Employee Id	Employee Name
1111	3 Test
1111	4 Test
70	Adam Pontipee
66	April Dawn
61	Autumn Bell
72	Destiny Smith
64	Dixie Louise
77	Frank Speaker
11	George Jetson
79	Helen Joy
63	Hope Eternal
62	Jane Doe
69	Joe Plumber
73	Joe Schmoe
111	Kelly Bridge
75	Kreema Patel
1Mac	Mac Donalds
65	Maxwell Jackson
6749	Nick Larsen
76	Percy Stakeney
68	Roger Sample
76	Sal Erie
74	Suzie Queue
1	Suzy Homemaker
9999	Terry Kinney
67	Vera Fyed

Applies To: Punches

Hours: Vacation, Unpaid, Holiday, Personal, Custom, Worked, Sunday, Regular

Monetary: Pick, Commission, Bonus, Meals (ded), Mileage, Hourly rates, Meeting Bonus, Piecework, Sales Bonus, New Type

Date Range: Current Pay Period

Tracking Levels to Assign: Department, Customer, Operation, Class / Grant, Region, Grouping, Location, Jobs (all set to Unchanged)

Include modified (not employee default)
 Adjust Pay Rate

Assign Tracking Levels (button) | Close (button)

5.5. Weekly Entry area

5.5.1. Going in to Weekly Entry

When you click on **“Weekly Entry”** on the Primary Navigation (Section A), you will be navigated to the **“Weekly Entry”** section as shown below.

The purpose of this area is to be able to quickly add Hours or Monetary records for employees. This bypasses the need to add them one by one in the employee’s Timesheet. Additionally, this area can add several at once.

Weekly Entry

Employee: TTest | Start Date: 12/20/2020 | Tracking Display Count: 0 | First Day of Week: None

Type	Sun 12,20	Mon 12,21	Tue 12,22	Wed 12,23	Thu 12,24	Fri 12,25	Sat 12,26	Total
Vacation	1							0.00
Total Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Add Row (button) | **Apply** (button) | **Undo** (button)

5.5.2. Understanding the Weekly Entry Screen

Given below are the selection options & dropdowns that are available on the **Weekly Entry Screen** as shown below

Type	Department	Customer	Operation	Mon 12/21	Tue 12/22	Wed 12/23	Thu 12/24	Fri 12/25	Sat 12/26	Sun 12/27	Total
Vacation	None	None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00

Total Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Employee: This dropdown contains the names of the employees whom you are authorized to mark weekly entries for

Start Date : Start Date is a calendar option which will allow you to mark the starting period for these weekly time entries

Tracking Display Count : This dropdown allow you to choose any applicable tracking levels for this weekly time entry

First Day of Week : This dropdown will allow you to choose the first day of the week

- If it's set to **None** (default) then the date selected will also be the first date of the 7 displayed.
- If the first day of the week is specified, then the Week will begin on that **Weekday**. The date selected will fall in the Defined week, but will only be the first entry if the Date and Weekday match.
- If you specify Monday, then select 12/20/2020, the first date shown is 12/21/2020 (Monday of the week containing 12/20/2020).

- If you then select 12/19/2020, the first date shown will be 12/14/2020 (Monday of the week containing 12/19/2020)

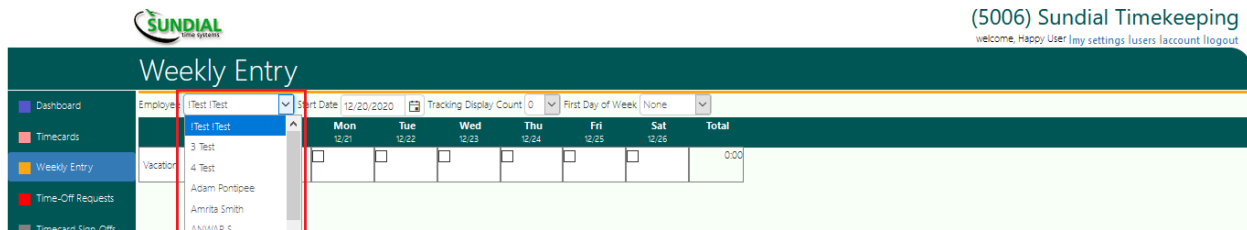
[Button] Apply : This button is used to “**Apply**” the changes on the Weekly Entries

[Button] Undo : This button is used to “**Undo**” any entries done on the Weekly Entries. Be aware that “Undo” only cancels the current edit - It does not Revert values that were previously Applied.

5.5.3. Entering weekly time

Step 1 - Choosing the Employee

In order to enter time, you will need to first choose an employee from the “**Employee**” dropdown as shown below.



Step 2 - Choosing the PTO or Monetary Record Type

Once the “**Employee**” is chosen, then you need to choose the “**PTO**” or “**Monetary**” type from the “**Type**” dropdown as shown below

Weekly Entry

Employee: Azhar Ul Islam | Start Date: 12/20/2020 | Tracking Display Count: 0 | First Day of Week: None

Type	Sun 12/20	Mon 12/21	Tue 12/22	Wed 12/23	Thu 12/24	Fri 12/25	Sat 12/26	Total
Vacation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0:00
PTO								
Vacation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
PTO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Unpaid	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Holiday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Personal	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Custom8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Worked - Sunday	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Regular	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Monetary								
Pick	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Commission	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Bonus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Meals (ded)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Mileage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Hourly rates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Meeting Bonus	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Piecework	0:00	0:00	0:00	0:00	0:00	0:00	0:00	0:00
Piecework	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Sales Bonus								

Apply Undo

Step 3 - Checking in the weekly time

Once the “PTO” or “Monetary” type is chosen, then you need to check (click on the checkbox) on the weekly checkboxes, as shown below.

Weekly Entry

Employee: Test / Test | Start Date: 12/20/2020 | Tracking Display Count: 0 | First Day of Week: None

Type	Sun 12/20	Mon 12/21	Tue 12/22	Wed 12/23	Thu 12/24	Fri 12/25	Sat 12/26	Total
Vacation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16:00

Once you check on the checkboxes, it will then load the default time per day as per your organizational configurations.

Furthermore, the system allows you to key in the number of hours manually too. In this case, you can simply type in the number of hours instead of checking the checkboxes as shown below

Weekly Entry

Employee: Test / Test | Start Date: 12/20/2020 | Tracking Display Count: 0 | First Day of Week: None

Type	Sun 12/20	Mon 12/21	Tue 12/22	Wed 12/23	Thu 12/24	Fri 12/25	Sat 12/26	Total
Vacation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	40:00
	8:00	8:00	8:00	8:00	8:00	<input type="text" value="8"/>		

Once the time is entered in the “text area” as shown above, system will automatically check the respective checkbox against this time entry as shown below

If you choose to change the **sub drop down** values, you can do simply clicking on a sub drop down and then by changing it form the default to the changed value as shown below

The screenshot shows the 'Weekly Entry' interface. At the top, there is a header with the title 'Weekly Entry' and a red close button. Below the header, there is a navigation sidebar on the left with options: Dashboard, Timecards, Weekly Entry (selected), Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main area displays a table for time entry. The table has columns for 'Type', 'Department', 'Tracking', 'Operation', and days of the week (Sun 12/20, Mon 12/21, Tue 12/22, Wed 12/23, Thu 12/24, Fri 12/25, Sat 12/26), plus a 'Total' column. A dropdown menu is open for the 'Department' field, showing a list of options: None, C655, Default, Distribution, Energy/Guard, General (highlighted), IT/Networking, Janitorial, library, Maintenance, Manufacturing, New York State Fair, outdoor pool, PROGRESS ENERGY, and Warehouse. Below the table, there is a summary row with 'Total Hours' and 'Total Amount' for each day and a grand total. At the bottom right, there are 'Apply' and 'Undo' buttons.

Type	Department	Tracking	Operation	Sun 12/20	Mon 12/21	Tue 12/22	Wed 12/23	Thu 12/24	Fri 12/25	Sat 12/26	Total
Personal	Default	None	10111	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	45:00
	None			9:00	9:00	9:00	9:00	9:00			
	C655										
	Default										
	Distribution										
	Energy/Guard										
	General										
	IT/Networking										
	Janitorial										
	library										
	Maintenance										
	Manufacturing										
	New York State Fair										
	outdoor pool										
	PROGRESS ENERGY										
	Warehouse										
Total Hours				9:00	9:00	9:00	9:00	9:00	0:00	0:00	45:00
Total Amount				\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Step 5 - Applying the Weekly Entries

Once a user begins an entry, they will **not be able** to select a different employee (**doing so would effectively abandon their edits**) until they either **Apply** or **Undo** their work.

"**Undo**" **undoes** ALL their edits, not just the last one.

Because it's HTML, we don't prevent the user from simply navigating away, which will effectively undo their edits as well.

Once the time entry is **completed**, you can simply click on the "**Apply**" Button, as shown below, which will save the data that you have entered

Weekly Entry

Employee: Test | Test Start Date: 12/20/2020 Tracking Display Count: 0 First Day of Week: None

Type	Sun 12/20	Mon 12/21	Tue 12/22	Wed 12/23	Thu 12/24	Fri 12/25	Sat 12/26	Total
Vacation	8:00	8:00	8:00	8:00	8:00	6:00		46:00
Total Hours	8:00	8:00	8:00	8:00	8:00	6:00	0:00	46:00
Total Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

5.6. Time-Off Request area

5.6.1. Going in to Time-Off Request

When you click on **“Time-Off Requests”** on the Primary Navigation (Section A), you will be navigated to the **“Time-Off Requests”** section as shown below

Time-Off Requests

filter: Quick Filter: Employees Lookback: 7 Days Show Pending Only:

Employee	Submitted	Hours	Type	Date Off	Hours	Status
----------	-----------	-------	------	----------	-------	--------

5.6.2. Viewing Time-Off Requests

When employees create time-off requests, the managers would see it in this area as shown below.

Employee	Submitted	Hours	Type	Date Off	Hours	Status
Jane Doe		8:00	Vacation	6/30/2020	8:00	Edit Deny
Jane Doe		8:00	PTO	7/1/2020	8:00	Edit Deny
Jane Doe		8:00	PTO	7/2/2020	8:00	Edit Deny
Autumn Bell		8:00	PTO	2/29/2020	8:00	Approve Deny
Autumn Bell		8:00	PTO	2/5/2020	8:00	Approve Deny
Terry Kinney		8:00	PTO	12/11/2019	8:00	Edit Deny

Additionally there are some dropdowns & a checkbox on this screen, which can be used to filter the results displayed based on the selection criteria

Quick Filter - The QuickFilter is a common section that will instantly swap one group for another. Using this filter, you will be able to select the employee group as shown below

Employee	Submitted	Hours	Type	Date Off	Hours	Status
Jane Doe		8:00	Vacation	6/30/2020	8:00	Edit Deny
Jane Doe		8:00	PTO	7/1/2020	8:00	Edit Deny
Jane Doe		8:00	PTO	7/2/2020	8:00	Edit Deny
Autumn Bell		8:00	PTO	2/29/2020	8:00	Approve Deny
Autumn Bell		8:00	PTO	2/5/2020	8:00	Approve Deny
Terry Kinney		8:00	PTO	12/11/2019	8:00	Edit Deny

Lookback Filter - This filter is used to select the number of days you wish to look back when it comes to the time-off request. The “Lookback” filter has the following options which you can select as shown below

Employee	Submitted	Hours	Type	Date Off	Hours	Status
Jane Doe		8:00	Vacation	6/30/2020	8:00	Edit Deny
Jane Doe		8:00	PTO	7/1/2020	8:00	Edit Deny
Jane Doe		8:00	PTO	7/2/2020	8:00	Edit Deny
Autumn Bell		8:00	PTO	2/29/2020	8:00	Approve Deny
Autumn Bell		8:00	PTO	2/5/2020	8:00	Approve Deny
Terry Kinney		8:00	PTO	12/11/2019	8:00	Edit Deny

1. **All Days** - When this is selected the system will display all time-off records of time offs irrespective of the period

2. **7 Days** - When this is selected the system will display any time-off requests that got initiated within the last 7 days. This will be selected by default
3. **30 Days** - When this is selected the system will display any time-off requests that got initiated within the last 30 days
4. **90 Days** - When this is selected the system will display any time-off requests that got initiated within the last 90 days

“Show Pending Only” CheckBox - If you check this checkbox the system will only display to you the time-off requests that are **pending for approval**.

This will be checked by default as shown below

The screenshot shows the 'Time-Off Requests' page in the Sundial Timekeeping system. The 'Show Pending Only' checkbox is checked, and the table displays only pending requests.

Employee	Submitted	Hours Type	Date Off	Hours	Status
Jane Doe		Vacation	6/30/2020	8:00	Edit Deny
Jane Doe		PTO	7/1/2020	8:00	Edit Deny
Jane Doe		PTO	7/2/2020	8:00	Edit Deny
Autumn Bell		PTO	2/29/2020	8:00	Approve Deny
Autumn Bell		PTO	2/5/2020	8:00	Approve Deny
Terry Kinney		PTO	12/11/2019	8:00	Edit Deny

However, if you wish to see all time-off requests irrespective of their approval status, then simply uncheck this checkbox and the system will display **all available time-off requests that got assigned to you** as shown below

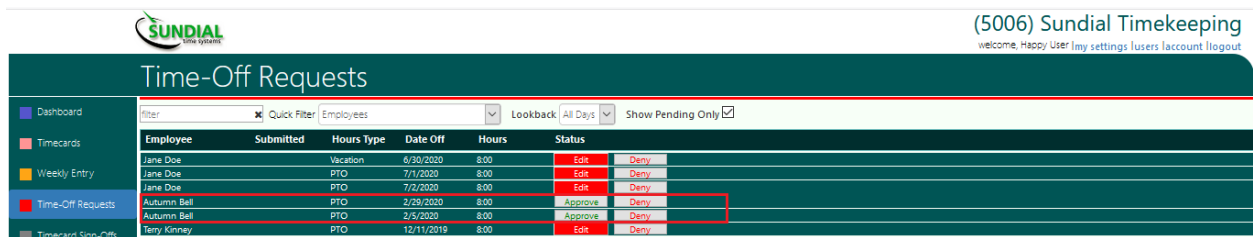
The screenshot shows the 'Time-Off Requests' page in the Sundial Timekeeping system. The 'Show Pending Only' checkbox is unchecked, and the table displays all available requests assigned to the user.

Employee	Submitted	Hours Type	Date Off	Hours	Status
Helen Joy		Holiday	7/3/2015	8:00	Approved by Joe Boss
Helen Joy		PTO	3/3/2017	8:00	Approved by Joe Boss
Helen Joy		Vacation	10/25/2018	8:00	Approved by Joe Boss
Percy Blakeney		Personal	5/18/2015	8:00	Approved by Little Boss
Percy Blakeney		PTO	6/17/2015	8:00	Approved by Joe Boss
April Dawn		Personal	12/31/2014	8:00	Denied by Joe Boss
April Dawn		PTO	1/28/2015	8:00	Approved by Little Boss
April Dawn		Personal (Unpaid)	2/8/2015	8:00	Approved by Joe Boss
April Dawn		Personal	2/25/2015	8:00	Denied by Joe Boss
April Dawn		PTO	3/6/2015	8:00	Denied by Joe Boss
April Dawn		Unpaid	5/19/2015	8:00	Denied by Joe Boss
April Dawn		Personal (Unpaid)	5/28/2015	8:00	Approved by Little Boss
April Dawn		PTO	8/11/2015	8:00	Denied by Little Boss
April Dawn		Holiday	8/21/2015	8:00	Approved by Joe Boss

5.6.3. Approving or Denying Time-off Requests

When time-off requests are displayed, you can quickly approve or deny it from here. If the request is **missing** a Required tracking item, such as a Department Assignment, “**Edit**” will be displayed instead of “Approve”. Required tracking items must be set before approval.

The displayed records for approval will show both options on the screen as shown below



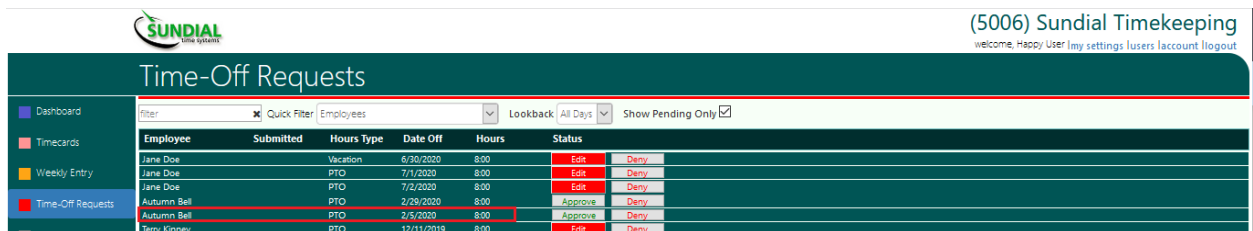
(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Time-Off Requests

filter: [x] Quick Filter: Employees [v] Lookback: All Days [v] Show Pending Only [x]

Employee	Submitted	Hours Type	Date Off	Hours	Status
Jane Doe		Vacation	6/30/2020	8:00	Edit Deny
Jane Doe		PTO	7/1/2020	8:00	Edit Deny
Jane Doe		PTO	7/2/2020	8:00	Edit Deny
Autumn Bell		PTO	2/29/2020	8:00	Approve Deny
Autumn Bell		PTO	2/5/2020	8:00	Approve Deny
Terry Kinney		PTO	12/11/2019	8:00	Edit Deny

Furthermore, if you are an authorized user, you will be able to edit the time-off records by double clicking on time-off request line item, as shown below



(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Time-Off Requests

filter: [x] Quick Filter: Employees [v] Lookback: All Days [v] Show Pending Only [x]

Employee	Submitted	Hours Type	Date Off	Hours	Status
Jane Doe		Vacation	6/30/2020	8:00	Edit Deny
Jane Doe		PTO	7/1/2020	8:00	Edit Deny
Jane Doe		PTO	7/2/2020	8:00	Edit Deny
Autumn Bell		PTO	2/29/2020	8:00	Approve Deny
Autumn Bell		PTO	2/5/2020	8:00	Approve Deny
Terry Kinney		PTO	12/11/2019	8:00	Edit Deny

When you double click on the time-off request line item, you will shown with edit screen which will allow you to change the below values

1. Hours Type
2. Date requested
3. Duration
4. Status
5. Supervisor Notes

Time-Off Request editing request

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

Request Details	Date Submitted: 2/10/2020
Employee:	Autumn Bell
Hours Type:	PTO
Date Requested:	2/29/2020
Duration:	8:00
Status:	Pending
Employee Notes:	
Supervisor Notes:	

Tracking Levels	Department: C655
Customer:	None
Operation:	None
Class / Grant:	None
Region:	None
Grouping:	None
Location:	Central
Jobs:	None

Note : If your company requires that certain Tracking Levels be used, then Time Off Requests must have a tracking level assigned before they can be approved. In the event of there is no tracking level tagged, the system will display **“Selection is required”** as shown below

Time-Off Request editing request

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

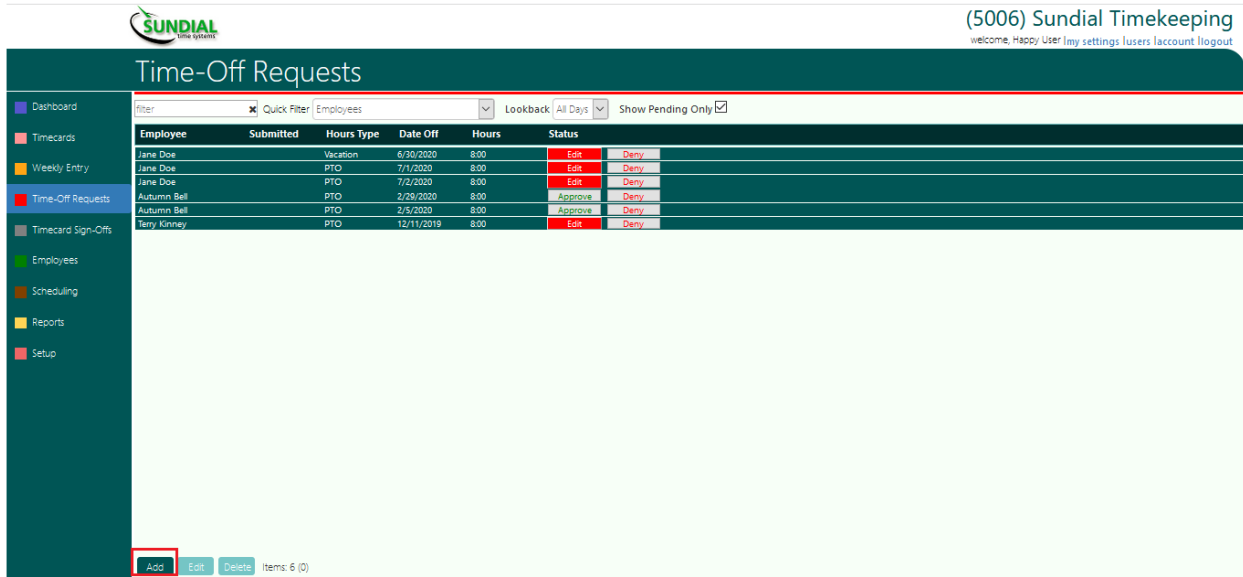
Request Details	Date Submitted: 12/20/2019
Employee:	Terry Kinney
Hours Type:	PTO
Date Requested:	12/11/2019
Duration:	8:00
Status:	Pending
Employee Notes:	I was sick
Supervisor Notes:	

Tracking Levels	Department: None
Customer:	None
Operation:	None
Class / Grant:	None
Region:	None
Grouping:	None
Location:	None
Jobs:	None

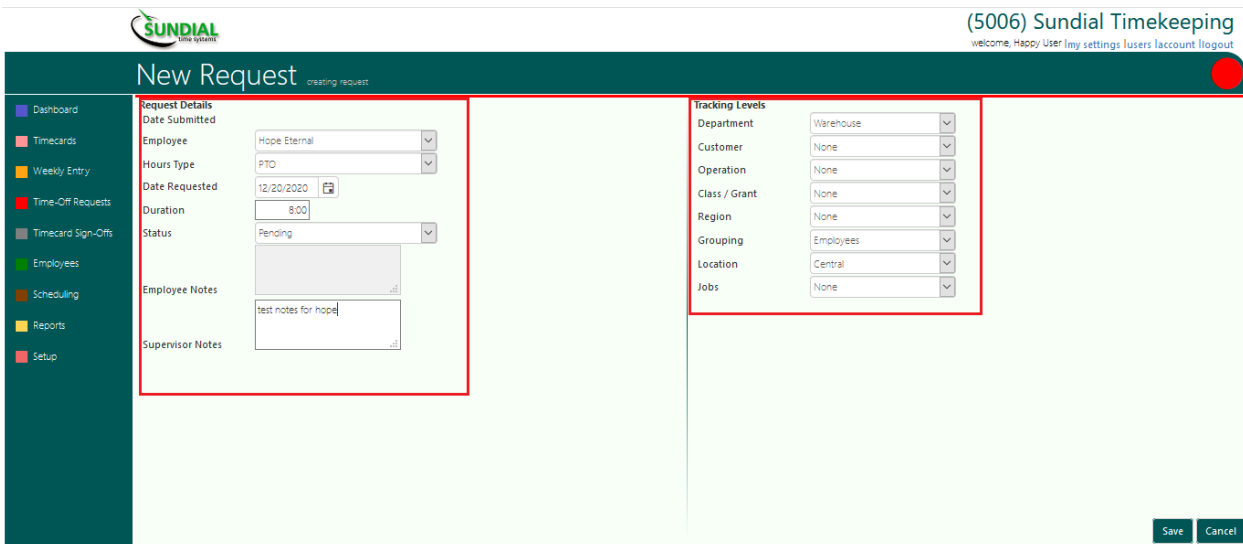
5.6.4. Creating a Time-Off Request for an Employee

If you wish to create a time-off request on behalf of an employee, the system allows you to do that.

To raise a time off request, please click on the **“Add”** button at the bottom of the screen



Once you click on the **“Add”**, a New Request screen will open, which will allow you to create the time-off record.



When you create a time-off request, below information needs to be filled by you

1. **Employee** : You need to select the employee name from the dropdown
2. **Hours Type** : This is a dropdown and you need to select the correct type (i.e. - If it's "Personal", "Sick", etc)
3. **Date requested** : This will be loaded by default for the current date. However you have the option to select the correct date, in the event if the default date it not the date needed
4. **Duration** : The hours per day will autofill with the default hours for the Type, and can be modified as needed.
5. **Status** : Status has values "Pending", "Approved" and "Denied" from which you can choose the right one
6. **Supervisor Notes** : you can add any notes here which will be visible to the employee

Note : When the employee is selected, system will load the default **Tracking Levels** from the employee configuration

Once this form is filled, you need to click on the **"Save"** button at the bottom of the screen as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

New Request creating request

Request Details

Date Submitted

Employee: Hope Eternal

Hours Type: PTO

Date Requested: 12/20/2020

Duration: 8:00

Status: Pending

Employee Notes: test notes for hope

Supervisor Notes

Tracking Levels

Department: Warehouse

Customer: None

Operation: None

Class / Grant: None

Region: None

Grouping: Employees

Location: Central

Jobs: None

Save **Cancel**

Once you click on **"Save"** the record will be created and it will displayed on your screen for approvals as shown below. If you didn't approve the record when you created it, you have the opportunity to approve it now.

Time-Off Requests

filter	Quick Filter: Employees	Lookback: 7 Days	Show Pending Only: <input checked="" type="checkbox"/>		
Employee	Submitted	Hours Type	Date Off	Hours	Status
Hope Eternal		PTO	12/20/2020	8:00	Approve Deny

5.7. Time Card Sign-offs area

5.7.1. Going in to Time-card Sign-offs

When you click on “Time-Off Requests” on the Primary Navigation (Section A), you will be navigated to the “Time-Off Requests” section as shown below

Timecard Sign-Offs

Pay Period: Previous	filter	Quick Filter: Employees	Show Unapproved Only: <input type="checkbox"/>				
Employee	Reg	OT1	OT2	Earnings	Employee	Supervisor	Supervisor Name
3 Test	86:40						
4 Test	32:28						
Adam Pontipee	40:00	1:44					
April Damm	40:00						
Autumn Bell	120:00	2:35					
Destiny Smith	40:00	1:37					
Dixie Louise	40:00	1:16					
Frank Speaker	40:00	0:45					
George Jetson	40:00	1:11					
Helen Joy	40:00	3:41					
Hope Eternal	96:00	2:07					
Jane Doe	40:00	1:31					
Joe Plumber	40:00	1:15					
Joe Schmoe	40:00	1:36					
Tally Embedge							
Kireena Patel	40:00	1:37					
Mac Donalds							
Maxwell Jackson	24:00	16:00	1:21				
Nick Larsen	40:00	2:15					
Percy Blakeney	98:30						
Roger Sempie	40:00	0:57					
Sai Eric	40:00						
Suzie Queue	40:00	1:22					
Suzzy Homemaker							
Terry Kinney							
Vera Fyed	33:00						

View Items: 26 (0) Remove Signatures Unsign Timecard Sign Timecard

Additionally there are some dropdowns, buttons & a checkbox on this screen, which can be used to filter the results displayed based on the selection criteria

Pay Period Filter - Pay This filter is used to select the **Pay Period** you wish to see the timecards for.

Given below are options that are available on the “**Pay Period Filter**”

1. **Current** - When this is selected the system will display all timecards records for the current Pay Period only
2. **Previous** - When this is selected the system will display all timecards records for the previous Pay Period only
3. **Previous (2)** - When this is selected the system will display all timecards records for the Pay Period immediately preceding the previous Pay Period

Quick Filter - The QuickFilter is a common section that will instantly swap one group for another. Using this filter, you will be able to select the employee group as shown below

[Checkbox] Show Unapproved only - This is a checkbox which allows you to choose the type of timecards that you wish to see on the screen.

This checkbox will be **checked** by default. If this is **checked**, you will only see the “**Unapproved**” time-cards only.

If this is unchecked the system will display you all the time-cards irrespective of their approval status.

Buttons -

[Button]Sign timecard - This button is used to sign selected timecards. If there are unsigned timecards in a prior period, they will also be signed.

[Button]Unsign timecard - This button is used to un-sign selected timecards. If there are future signed timecards, they will also be unsigned.

[Button]Remove Signatures - This button is used to remove both the Employee and the User signatures for the timecard. If there are future signed timecards, signatures will also be removed from them.

5.7.2. Signing Time-cards

Employees are allowed to sign their own timecards through WebConnect, the Employee Self-Service software.

Once the signing happens the system will not accommodate any further changes to the timecards without unsigning.

Users are allowed to sign timecards of their employees.

In order to sign a timecard, simply click on the timecard (i.e. select the line item) by clicking on it as shown below

(5006) Sundial Timekeeping
welcome, Maddy User | my settings | users | account | logout

Timecard Sign-Offs

Pay Period: Previous(2) | filter | Quick Filter: Employees | Show Unapproved Only

Employee	Reg	OT1	OT2	Earnings	Employee	Sign-Offs	Supervisor	Supervisor Name
3 Test	88.40							
4 Test								
Adam Pontipee	40.00	1.43						
April Dawn	40.00	1.44						
Autumn Bell	120.00	2.35						
Destiny Smith	40.00	1.37						
Dina Louise	40.00	1.16						
Frank Spaaker	40.00	0.45						
George Jetson	40.00	1.11						
Helen Jov	40.00	3.41						
Nope Bernal	35.00	2.97						
Jane Doe	40.00	1.31						
Joe Blumber	40.00	1.15						
Joe Schmoie	40.00	1.36						
Kelly Ethridge								
Kreena Patel	40.00	1.37						
Mac Donalds								
Marwell Jackson	24.00	16.00	1.21					
Nick Larsen	40.00		2.15					
Percy Blakenay	98.30							
Roger Sample	40.00	0.57						
Sal Erie	40.00							
Suzie Queue	40.00	1.22						
Suzy Homemaker								
Terry Kinney								
Vera Fyed	40.00	1.33						

View | Items: 26 (1)

Remove Signatures | Unsign Timecard | Sign Timecard

Once clicked, go and select the “Sign Timecard” button, in order to sign it as shown below

Timecard Sign-Offs

Pay Period: Previous(2) | filter: Employees | Quick Filter: Employees | Show Unapproved Only

Employee	Reg	OT1	OT2	Earnings	Employee	Supervisor	Supervisor Name
3 Test	86.40						
4 Test							
Adam Pontpee	40.00	1.43					
April Dawn	40.00	1.44					
Autumn Bell	120.00	2.35					
Destiny Smith	40.00	1.37					
Dixie Louise	40.00	1.16					
Frank Speaker	40.00	0.45					
George Jetson	40.00	1.11					
Helen Joy	40.00	3.41					
Hope Eternal	96.00	2.97					
Jane Doe	40.00	1.31					
Joe Plumber	40.00	1.15					
Joe Schmo	40.00	1.36					
Kelly Ethridge							
Kreana Patel	40.00	1.37					
Mac Donalds							
Maxwell Jackson	24.00	16.00	1.21				
Nick Larsen	40.00	2.15					
Randy Balsevay	80.20						
Roger Sample	40.00	0.57					
Sal Erie	40.00						
Suzie Queue	40.00	1.22					
Suzy Homemaker							
Terry Kinney							
Wes Fyed	40.00	1.33					

View items: 26 (0)

Remove Signatures | Unsign Timecard | **Sign Timecard**

Once the signing is completed, the signed timecard will display a "Green tick mark" next to it as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Timecard Sign-Offs

Pay Period: Previous(2) | filter: Employees | Quick Filter: Employees | Show Unapproved Only

Employee	Reg	OT1	OT2	Earnings	Employee	Supervisor	Supervisor Name
3 Test	86.40						
4 Test							
Adam Pontpee	40.00	1.43					
April Dawn	40.00	1.44					
Autumn Bell	120.00	2.35					
Destiny Smith	40.00	1.37					
Dixie Louise	40.00	1.16					
Frank Speaker	40.00	0.45					
George Jetson	40.00	1.11					
Helen Joy	40.00	3.41					
Hope Eternal	96.00	2.97				12/22/2020	Happy User
Jane Doe	40.00	1.31					
Joe Plumber	40.00	1.15					
Joe Schmo	40.00	1.36					
Kelly Ethridge							

5.7.3. Un-signing Time-cards

As explained above, once the signing happens the system will not accommodate any further changes to the timecards without unsigning.

Only a timecard which is already **signed** can be **unsigned**.

To **unsign** a timecard, simply click on the signed timecard (i.e. select the line item) by clicking on it as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Timecard Sign-Offs

Pay Period: Previous(2) | Filter: | Quick Filter: Employees | Show Unapproved Only

Employee	Reg	OT1	OT2	Earnings	Employee	Sign-Offs	Supervisor	Supervisor Name
3 Test	86.40							
4 Test								
Adam Pontpee	40.00	1.43						
April Dawn	40.00	1.44						
Autumn Bell	120.00	2.35						
Destry Smith	40.00	1.37						
Diva Louise	40.00	1.16						
Frank Speaker	40.00	0.45						
George Jetson	40.00	1.11						
Helen Joy	40.00	3.41						
Hope Eternal	96.00	2.07				12/22/2020	Happy User	
Jane Doe	40.00	1.31						
Joe Plumber	40.00	1.15						
Joe Schmo	40.00	1.36						
Kelly Ethridge								
Kreena Patel	40.00	1.37						
Mac Donalds								

Once clicked, go and select the **“Unsign Timecard”** button, in order to unsign it.

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Timecard Sign-Offs

Pay Period: Previous(2) | Filter: | Quick Filter: Employees | Show Unapproved Only

Employee	Reg	OT1	OT2	Earnings	Employee	Sign-Offs	Supervisor	Supervisor Name
3 Test	86.40							
4 Test								
Adam Pontpee	40.00	1.43						
April Dawn	40.00	1.44						
Autumn Bell	120.00	2.35						
Destry Smith	40.00	1.37						
Diva Louise	40.00	1.16						
Frank Speaker	40.00	0.45						
George Jetson	40.00	1.11						
Helen Joy	40.00	3.41						
Hope Eternal	96.00	2.07				12/22/2020	Happy User	
Jane Doe	40.00	1.31						
Joe Plumber	40.00	1.15						
Joe Schmo	40.00	1.36						
Kelly Ethridge								
Kreena Patel	40.00	1.37						
Mac Donalds								
Maxwell Jackson	24.00	16.00	1.21					
Nick Lanan	40.00	2.15						
Darcy Bakaney	96.30							
Roger Sample	40.00	0.57						
Sal Erie	40.00							
Suzie Queue	40.00	1.22						
Suzzy Homemaker								
Terry Kinney								
Vera Fyad	40.00	1.33						

View | Items: 26 (1)

Remove Signature | Unsign Timecard | Sign Timecard

Once **Unsigned** the **“Green tick mark”** would **disappear** from the unsigned record as shown below



Timecard Sign-Offs									
Pay Period: Previous(2) filter		Quick Filter: Employees			Show Unapproved Only				
Employee	Reg	OT1	OT2	Earnings	Employee	Supervisor	Supervisor Name	Sign-Offs	
3 Test	86:40								
4 Test									
Adam Pontpee	40:00	1:43							
Apolo Duen	40:00	1:44							
Autumn Bel	120:00	2:35							
Destry Smith	40:00	1:37							
Dora Louise	40:00	1:16							
Frank Speaker	40:00	0:45							
George Jetson	40:00	1:11							
Helen Joy	40:00	3:41							
Hope Beamal	96:00	2:07							
Jane Doe	40:00	1:31							
Joe Plumber	40:00	1:15							
Joe Schmoie	40:00	1:36							
Kelly Ethridge									
Korena Patel	40:00	1:37							

5.8. Employees area

5.8.1. Going in to Employees

When you click on **“Employees”** on the Primary Navigation (Section A), you will be navigated to the **“Employees”** section as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Employees

Filter Quick Filter [All] Include Inactive

Employee ID	Name	Hire Date	Is Active
1	I Test	5/30/2018	✓
1111	J Test	1/2/2019	✓
1111	J Test	11/18/2020	✓
70	Adam Ponspee	3/20/2012	✓
3142	Amrita Smith	4/17/2017	✓
666	ANWAR S	4/21/2017	✓
66	April Dawn	6/1/2012	✓
61	Autumn Bell	3/20/2012	✓
2315	Azhar Ul Islam	1/13/2017	✓
15	barry morgan	11/3/2014	✓
2	Blake Shelton	7/13/2017	✓
2259	brock Lee	5/29/2015	✓
73	Darshy Smith	7/2/2012	✓
10/1/18	Dirf Test	10/5/2019	✓
399	Dirf Test	11/1/2016	✓
64	Dixie Louise	3/20/2012	✓
11	ele ven	8/28/2019	✓
	Elise Holden	7/3/2018	✓
77	Frank Speaker	3/26/2013	✓
	Fred Bob Jacobs	4/21/2020	✓
FLS	Fred L Smith	10/1/2014	✓
3000	Fred Smith	1/21/2015	✓
71	George Jetson	3/20/2012	✓
79	Helen Joy	5/10/2013	✓
63	Hope Eernal	3/20/2012	✓
9006	Imran Khan	1/12/2015	✓
20180131	Jan 31	1/31/2018	✓
201801312	Jan 31(2)	1/31/2018	✓
201801313	Jan 31(3)	1/31/2018	✓

items: 77 (0)

5.8.2. Understanding the Employees Screen

This screen in general displays the existing employee information in the system, such as the **“Hire Date”**, **“Active Status”** as shown below

Employees

Filter: [All] Quick Filter: [All] Include Inactive Sync Employees

Employee ID	Name	Hire Date	Is Active
	Test Test	5/30/2018	✓
	3 Test	1/2/2019	✓
	4 Test	11/18/2020	✓
70	Adam Pontpee	3/20/2012	✓
3142	Amrita Smith	4/17/2017	✓
666	ANWAR S	4/21/2017	✓
66	April Dawn	6/1/2012	✓
61	Azunnah Bell	3/20/2012	✓
2315	Azhar Ul Islam	1/13/2017	✓
35	Barry Morgan	11/3/2014	✓
2	Blake Shelton	7/13/2017	✓
2269	Brock Lee	5/20/2015	✓
72	Destiny Smith	7/2/2012	✓
D Test	Diff Test	10/5/2019	✓
999	Diff Test	11/1/2016	✓
64	Diole Louise	3/20/2012	✓
11	Elise Ven	8/28/2019	✓
	Elise Holden	7/3/2018	✓
77	Frank Speaker	3/26/2013	✓
	Fred Bob Jacobs	4/21/2020	✓
FLS	Fred L. Smith	10/1/2014	✓
3000	Fred Smith	1/21/2015	✓
71	George Jetson	3/20/2012	✓
79	Helen Joy	5/10/2013	✓
63	Hope Eternal	3/20/2012	✓
8006	Imrian Khan	1/12/2015	✓
20180131	Jan 31	1/31/2018	✓
20180132	Jan 31(2)	1/31/2018	✓
20180133	Jan 31(3)	1/31/2018	✓

Add Edit Delete Items: 77 (0)

Given below are the selection options & dropdowns that are available on the **Employees** Screen as shown below

Sync Employees - Sync employee is a feature using which we can link to an employee sync file where a file can be imported and then the records can be synced to relevant employees based on their employee ID. Please refer "Appendix 1 - Employee Sync"

In order to perform a sync employee, you need to simply click on the **"Sync Employee"** button as shown below

Employees

Filter: [Unassigned] Quick Filter: [Unassigned] Include Inactive Sync Employees

Employee ID	Name	Hire Date	Is Active
2315	Azhar Ul Islam	1/13/2017	✓
2	Blake Shelton	7/13/2017	✓
	Elise Holden	7/3/2018	✓

Once clicked, a dialog appears. From here, use "Browse" to select the external file to process. .

Employees

Filter: [Unassigned] Quick Filter: [Unassigned] Include Inactive Sync Employees

Import Employee File

File Names
Browse... No files selected.

Perform Import
Import Files

File
Progress

Close

Employee ID	Name	Hire Date	Is Active
2315	Azhar Ul Islam	1/13/2017	✓
2	Blake Shelton	7/13/2017	✓
	Elise Holden	7/3/2018	✓
8006	Fred Bob Jacobs	4/21/2020	✓
1	Imrian Khan	1/12/2015	✓
1	Janelle Tada	7/13/2017	✓
1	Janet Dolbert	4/28/2017	✓
1	John Smith	6/10/2016	✓
2	Marshall Mathers	3/20/2012	✓
2325	MASON PHAN	4/18/2017	✓
	Hope Eternal	1/30/2018	✓

After selecting the file click, on the **“Import Files”** button in the pop-up/overlay which will then process the synchronization file. Processing the file will Add, Remove and Update employees as needed. For large files, the progress indicator will let you know how far the system has progressed.

Quick Filter - The QuickFilter is a common section that will instantly swap one group for another. Using this filter, you will be able to select the employee group as shown below

[Checkbox]Include Inactive - This is a checkbox which allows you to choose the type of employees you wish to see

This checkbox will be **un-checked** by default. If this is **checked**, you will see both **“Active”** and **“Inactive”** Employees

Buttons -

[Button] Add - This button is used to **“Add”** a **“New Employee”** to the system

[Button] Edit- This button is used to **“Edit”** an **“Existing Employee”** record in the system

[Button] Delete - This button is used to **“Delete”** an **“Existing Employee”** record in the system

5.8.3. Editing Employee Information

You can either **double click** on the employee (i.e. line item) or **select** the employee and click on the **edit** button

Once you do this, you will be navigated to a screen where you will be able to edit the employee records as shown below.

This screen will have 3 tabs as follows **“General”**, **“Employment”** and **“Externals”**.

The screenshot displays the 'editing employee' interface for 'Hope Eternal'. The top header includes the Sundial logo and the text '(5006) Sundial Timekeeping' with a user welcome message. The main content area features three tabs: 'General', 'Employment', and 'Externals', with 'General' selected. The 'General' tab contains the following sections:

- Status:** 'Is Active' checkbox is checked.
- Identification Information:** Fields for Employee Id (63), First Name (Hope), Middle Name, and Last Name (Eternal).
- Contact Information:** Fields for Street, City, State, Postal Code, Country, Home Phone, Mobile Phone, and Email.
- Emergency Information:** Fields for Emergency Contact and Emergency Phone, and a Notes text area.
- User Defined Properties:** A table with columns 'Name' and 'Value'.

Name	Value
Alt Rate 1	
Alt Rate 2	
Alt Rate 3	
Alt Rate 4	
Penssoft ID	000-00-0000
SSN	

A 'Cancel' button is located at the bottom right of the form.

“General” tab contains the fields listed below

Status

[Checkbox] Status : This checkbox shows the active status of the employee. Unchecking it will make the employee “Inactive” in the system. Marking an Employee “Inactive” will cause a Release Date field to appear, with a default value of the current date. If the employee has any clock identities, then marking the employee inactive will also cause a Clock ID Handling prompt to appear, with the default handling being “Remove”. “Leave”, and “Unassign” are the other choices.

“Remove”

Selecting Remove will instruct the clocks to remove the employee credentials and will discard any Database copies of those credentials.

“Leave”

Selecting Leave will cause all components of the employee credentials to remain in place, including leaving them in the clock

“Unassign”

Selecting Unassign will leave the credential components intact in the database, and in the clock, but disconnects those credentials from the employee record.

Identification Information

Employee ID : This field shows the employee ID of the employee. This is **not a mandatory field** in the system. However, most people tend to have an employee ID filled. When a bulk import or update of employees is performed (“Sync Employees”), then “Employee ID” **is required and must be unique.**

First Name : This is a mandatory field in the system

Middle Name : This is not a mandatory field in the system

Last Name : This is a mandatory field in the system

Contact Information (None of these fields are mandatory)

Street : This field shows the Street details of the address.

City : This field shows the City details of the address.

State : This field shows the State details of the address.

Postal Code : This field shows the Postal code details of the address.

Country : This field shows the Country details of the address.

Home Phone :This field shows the home phone number.

Mobile Phone :This field shows the mobile phone number.

Email : This field shows the email address

Emergency Information

Emergency Contact : This fields shows any emergency contact configured

Emergency Phone : This field shown the emergency contact's phone number

Notes : This field shows any notes pertinent to the emergency section

User Defined Properties

These are company definable fields that can be defined to capture any useful information pertinent and relevant to the employees

“Employment” tab contains the fields listed below

(5006) Sundial Timekeeping
welcome, Happy User | my settings users account logout

April Dawn editing employee

General **Employment** Externals

Policies

Pay Period Rule: Weekly (Monday) [v]
Overtime Rule: Weekly [v]
Holiday Rule: US Holidays [v]
Shift Differential Rule: None [v]

Hire Information

Hire Date: 6/1/2012 [calendar]
Release Date: [calendar]

Accruals

Accrual Plan: Office [v]

Hours	As Of	Start	Accrued	Used	Over	Avail
Unpaid	12/14/2020	8300	0.00	0.00	0.00	8300
Personal	12/14/2020	2700	0.00	0.00	0.00	2700
PTO	12/14/2020	15400	0.00	0.00	0.00	15400
Vacation	12/14/2020	160200	0.00	0.00	0.00	161100

Default Tracking Levels

Department: Production [v] [locked]
Customer: Cooking [v]
Operation: None [v]
Class / Grant: None [v]
Region: None [v]
Grouping: Employees [v]
Location: West side [v]
Jobs: None [v]

Compensation

Current

Pay Rate: \$10.00
Salary Amount: [input]
Salary Hours: [input]
Modify Salary [button]
Salary Rule: Everyone [v]

Billing

Billing Rate: \$20.00
OT1 Billing Rate: [input]
OT2 Billing Rate: [input]

Edit Items: 4 (0) [Cancel]

Policies

Pay Period Rule : This field displays any Pay Period rules configured in the system

Overtime Rule : This field displays any Overtime rule that is configured in the system

Holiday Rule : This field displays any Holiday rule that is configured in the system

Shift Differential Rule : This field displays and Shift Differential Rule configured in the system

Hire Information

Hire date : This field displays the “Hire date” of the employee

Release Date : This field displays the Release Date” for any employees if they are inactive in the system. (once the is Active checkbox is unchecked, system will consider this date as the default release date with the ability to change/override it

Accruals

Accrual Plan : Existing accrual balances are displayed with the options to make adjustments for the balances

You can do any balance adjustments by simply “Double Clicking” on the accrual balances (line items) as shown below

Balances are generally maintained for a specific period “As of” and the default date of this will be the start of the “previous period”

However the system allows you to rebuild/re-calculate the accruals which can be done via the approval adjustments. For more details, please refer below

The screenshot shows the Sundial Timekeeping interface for an employee named April Dawn. The 'Accruals' section is active, displaying a table of accrual balances. The table has the following data:

Hours	As Of	Start	Accrued	Used	Over	Avail
Unpaid	12/14/2020	80.00	0.00	0.00	0.00	80.00
Personal	12/14/2020	27.00	0.00	0.00	0.00	27.00
PTO	12/14/2020	154.00	0.00	0.00	0.00	154.00
Vacation	12/14/2020	1602.00	9.00	0.00	0.00	1611.00

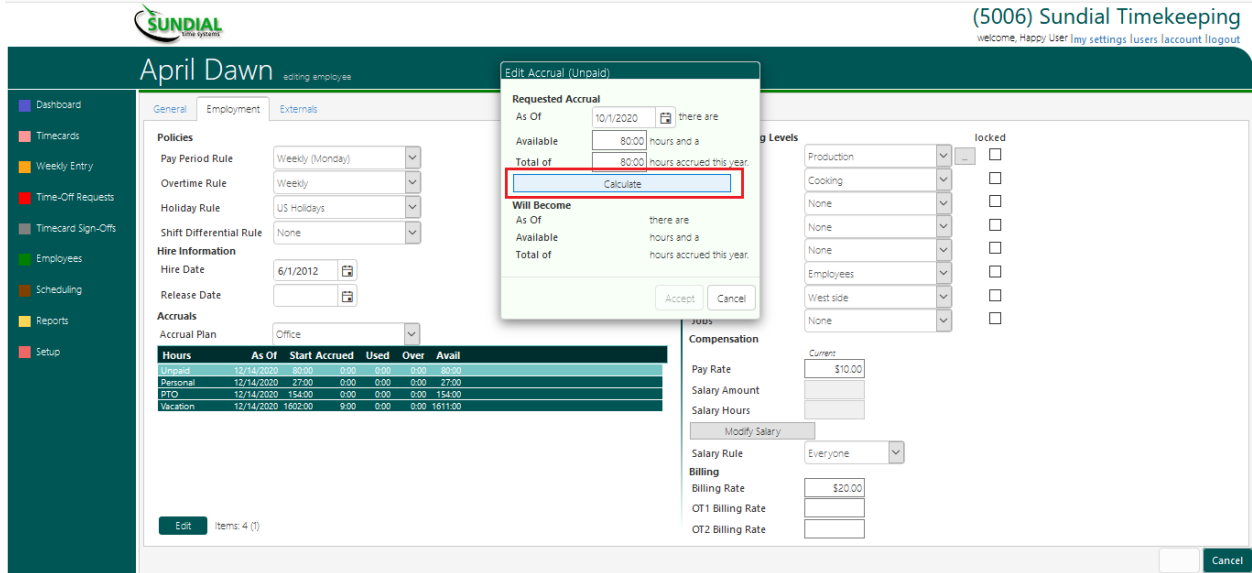
The 'Unpaid' row is highlighted in red, indicating it is selected for editing. The 'Default Tracking Levels' section on the right shows various organizational levels like Department, Operation, and Location, each with a dropdown menu and a 'locked' checkbox.

Once you “double click”, there will be a pop-up/overlay loaded as shown below, allowing you to make any accrual adjustments

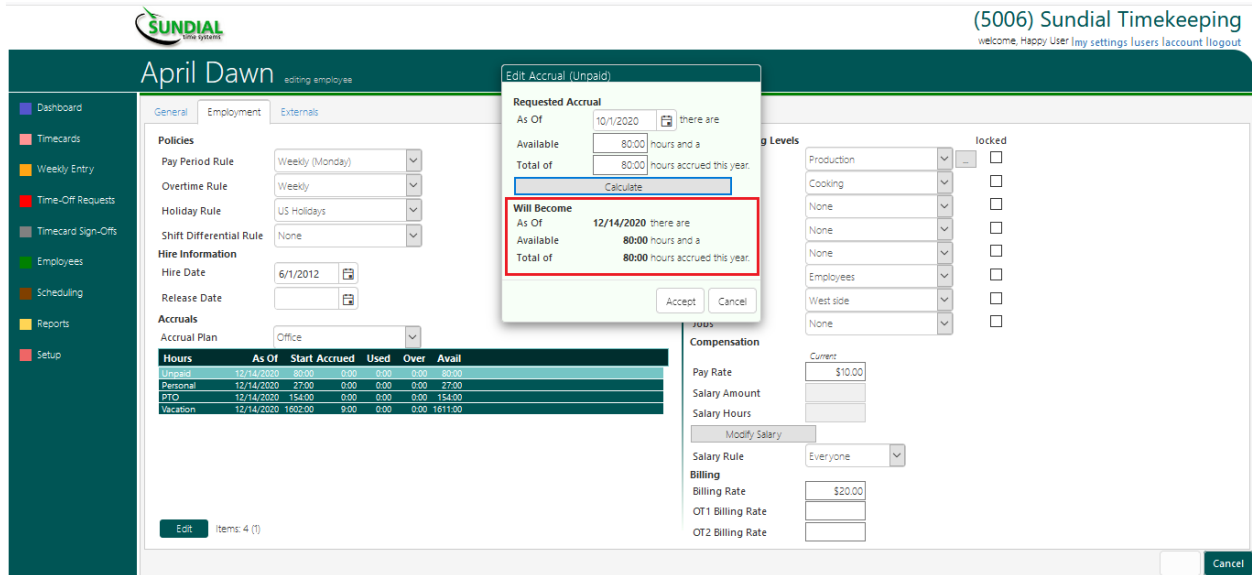
Hours	As Of	Start Accrued	Used	Over	Avail
Unpaid	12/14/2020	80.00	0.00	0.00	80.00
Personal	12/14/2020	27.00	0.00	0.00	27.00
PTO	12/14/2020	154.00	0.00	0.00	154.00
Vacation	12/14/2020	1602.00	9.00	0.00	1611.00

rebuild/re-calculate the accruals - once the above pop-up/overlay is loaded, you will be able to set the start date choosing it from the calendar option as shown below

Once the date is chosen, you can simply click on the “Calculate” button



Once you click on “Calculate” the system will calculate and display the updated accruals as shown below



Once you verify the calculations, you can simply click on the “Accept” button as shown below in order for the system to apply the new accrual balances

April Dawn editing employee

General | Employment | Externals

Policies

Pay Period Rule: Weekly (Monday)

Overtime Rule: Weekly

Holiday Rule: US Holidays

Shift Differential Rule: None

Hire Information

Hire Date: 6/1/2012

Release Date:

Accruals

Accrual Plan: Office

Hours	As Of	Start	Accrued	Used	Over	Avail
Unpaid	12/14/2020	80.00	0.00	0.00	0.00	80.00
Personal	12/14/2020	27.00	0.00	0.00	0.00	27.00
PTO	12/14/2020	154.00	0.00	0.00	0.00	154.00
Vacation	12/14/2020	1602.00	9.00	0.00	0.00	1611.00

Edit Items: 4 (1)

Edit Accrual (Unpaid)

Requested Accrual

As Of: 10/1/2020 there are

Available: 80.00 hours and a

Total of: 80.00 hours accrued this year.

Calculate

Will Become

As Of: 12/14/2020 there are

Available: 80.00 hours and a

Total of: 80.00 hours accrued this year.

Accept Cancel

Default Tracking Levels

locked

Department: Production

Customer: Cooking

Operation: None

Class / Grant: None

Region: None

Grouping: Employees

Location: West side

Jobs: None

Compensation

Current

Pay Rate: \$10.00

Salary Amount:

Salary Hours:

Modify Salary

Salary Rule: Everyone

Billing

Billing Rate: \$20.00

OT1 Billing Rate:

OT2 Billing Rate:

Save Cancel

Once accepted, you will see the new balances applied to the relevant line item of accruals as shown below

April Dawn editing employee

General | Employment | Externals

Policies

Pay Period Rule: Weekly (Monday)

Overtime Rule: Weekly

Holiday Rule: US Holidays

Shift Differential Rule: None

Hire Information

Hire Date: 6/1/2012

Release Date:

Accruals

Accrual Plan: Office

Hours	As Of	Start	Accrued	Used	Over	Avail
Unpaid	12/14/2020	80.00	0.00	0.00	0.00	80.00
Personal	12/14/2020	27.00	0.00	0.00	0.00	27.00
PTO	12/14/2020	154.00	0.00	0.00	0.00	154.00
Vacation	12/14/2020	1602.00	9.00	0.00	0.00	1611.00

Edit Items: 4 (1)

Default Tracking Levels

locked

Department: Production

Customer: Cooking

Operation: None

Class / Grant: None

Region: None

Grouping: Employees

Location: West side

Jobs: None

Compensation

Current

Pay Rate: \$10.00

Salary Amount:

Salary Hours:

Modify Salary

Salary Rule: Everyone

Billing

Billing Rate: \$20.00

OT1 Billing Rate:

OT2 Billing Rate:

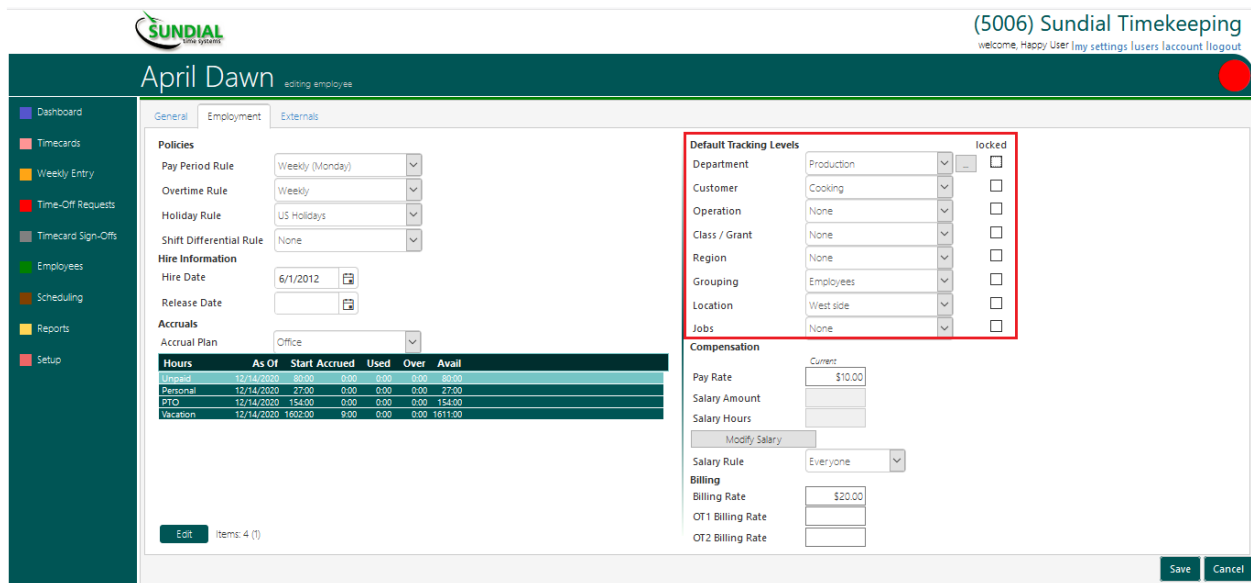
Save Cancel

Default Tracking Levels

Use this section to assign Default Tracking Items for any of the eight Tracking Levels that are being used. Tracking Item Assignment to Punches and other records can come from multiple sources, and when two or more sources conflict, the “most deliberate” succeeds. An Employee’s Default Tracking Item will only be assigned to Punches, Hours Records or Monetary Records when no other source set that particular Tracking Level.

NOTE: Employee Filters and Whitelist Filters that are based on Tracking Items will use Assigned Items for filtering.

You will see a checkbox against each of the above items under the title “**Locked**” as shown below.



The screenshot displays the Sundial Timekeeping system interface. The top navigation bar includes the Sundial logo, the user name "April Dawn" (editing employee), and the system version "(5006) Sundial Timekeeping". A sidebar on the left contains navigation links for Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is divided into three tabs: General, Employment, and Externals. The "Default Tracking Levels" section is highlighted with a red box and contains a table with the following data:

		locked
Department	Production	<input type="checkbox"/>
Customer	Cooking	<input type="checkbox"/>
Operation	None	<input type="checkbox"/>
Class / Grant	None	<input type="checkbox"/>
Region	None	<input type="checkbox"/>
Grouping	Employees	<input type="checkbox"/>
Location	West side	<input type="checkbox"/>
Jobs	None	<input type="checkbox"/>

Below the table, the "Compensation" section includes fields for Pay Rate (\$10.00), Salary Amount, Salary Hours, Salary Rule (Everyone), Billing Rate (\$20.00), OT1 Billing Rate, and OT2 Billing Rate. At the bottom right, there are "Save" and "Cancel" buttons.

Locking a tracking level changes the Source Priority. Marking an Item Locked will prevent that tracking level item from being modified by a conflicting Clock Default. Explicit tracking item selections will still apply.

April Dawn editing employee

General Employment Externals

Policies

Pay Period Rule: Weekly (Monday) [v]
 Overtime Rule: Weekly [v]
 Holiday Rule: US Holidays [v]
 Shift Differential Rule: None [v]

Hire Information

Hire Date: 6/1/2012 [c]
 Release Date: [c]

Accruals

Accrual Plan: Office [v]

Hours	As Of	Start	Accrued	Used	Over	Avail
Unpaid	12/14/2020	80.00	0.00	0.00	0.00	80.00
Personal	12/14/2020	27.00	0.00	0.00	0.00	27.00
PTO	12/14/2020	154.00	0.00	0.00	0.00	154.00
Vacation	12/14/2020	1602.00	0.00	0.00	0.00	1611.00

Default Tracking Levels

Department: Production [v] locked
 Customer: Cooking [v]
 Operation: None [v]
 Class / Grant: None [v]
 Region: None [v]
 Grouping: Employees [v]
 Location: West side [v]
 Jobs: None [v]

Compensation

Current

Pay Rate: \$10.00
 Salary Amount: []
 Salary Hours: []
 Modify Salary [b]
 Salary Rule: Everyone [v]

Billing

Billing Rate: \$20.00
 OT1 Billing Rate: []
 OT2 Billing Rate: []

Save Cancel

Compensation

Pay rate : Existing pay rates are displayed here with the option to edit if required

Salary Amount : Existing pay rates are displayed here with the option to edit if required (edit needs to be done via the modify salary button)

Salary Hours : Existing pay rates are displayed here with the option to edit if required (edit needs to be done via the modify salary button)

Modify Salary : This is a button which will allow you to modify the salary information as shown below

April Dawn editing employee

General Employment Externals

Policies

Pay Period Rule: Weekly (Monday) [v]
 Overtime Rule: Weekly [v]
 Holiday Rule: US Holidays [v]
 Shift Differential Rule: None [v]

Hire Information

Hire Date: 6/1/2012 [c]
 Release Date: [c]

Accruals

Accrual Plan: Office [v]

Hours	As Of	Start	Accrued	Used	Over	Avail
Unpaid	12/14/2020	80.00	0.00	0.00	0.00	80.00
Personal	12/14/2020	27.00	0.00	0.00	0.00	27.00
PTO	12/14/2020	154.00	0.00	0.00	0.00	154.00
Vacation	12/14/2020	1602.00	0.00	0.00	0.00	1611.00

Default Tracking Levels

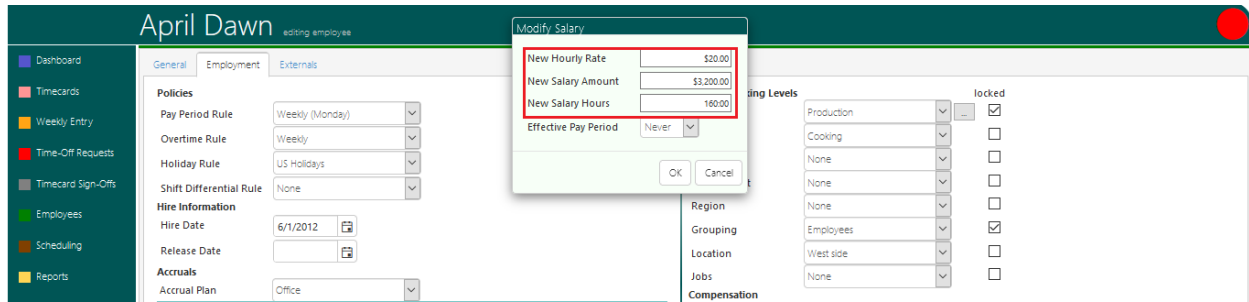
Department: Production [v] locked
 Customer: Cooking [v]
 Operation: None [v]
 Class / Grant: None [v]
 Region: None [v]
 Grouping: Employees [v]
 Location: West side [v]
 Jobs: None [v]

Compensation

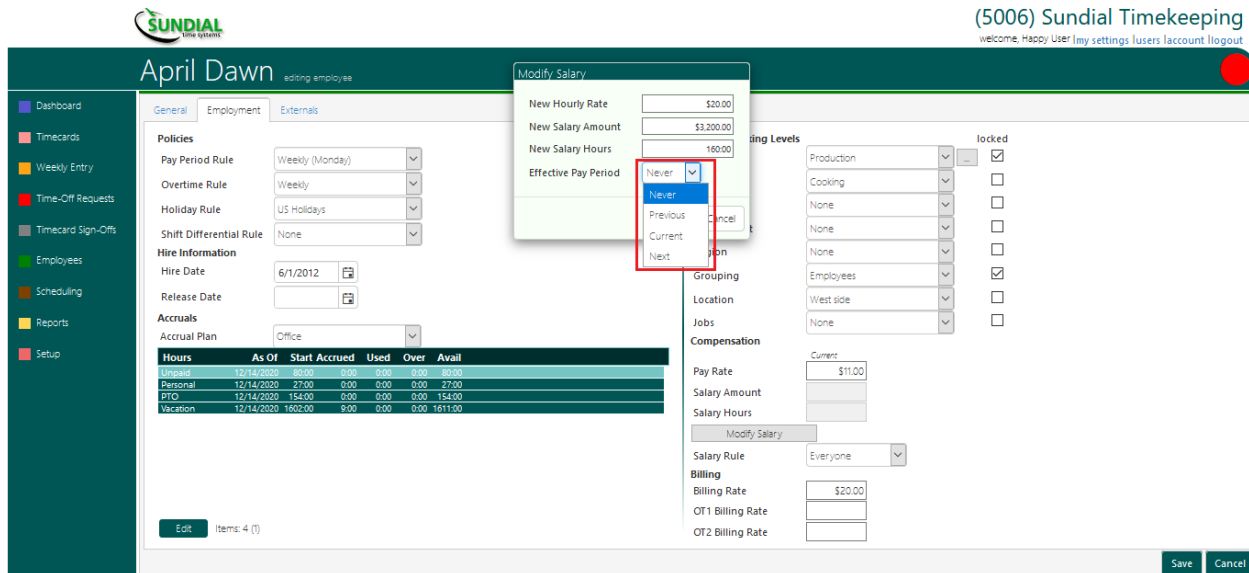
Current

Pay Rate: \$11.00
 Salary Amount: []
 Salary Hours: []
 Modify Salary [b]

Once this is clicked the system will load a pop-up/overlay as shown below. Once its loaded, you will need to key in values for “**New Hourly rate**”, “**New Salary Amount**” and “**New Salary Hours**”. You only need to enter two values and the system will calculate the 3rd value.



Once the above information and keyed in, you need to select the correct value from the “**Effective Pay Period**”. Based on the chosen period, the system will apply these changes to the Previous Period, the Current Period, or store them to take effect Next Period..



Salary Rule : This field displays the available salary rules that are pre-configured in the system and you can choose the correct salary rule from the options available. Salary Rules are used to instruct the system which types of Hours records will adjust Salary calculations. If Salary Rule is “None”, then all Hours types will adjust Salary Calculations.

April Dawn editing employee

General | Employment | **Externals**

Policies

Pay Period Rule: Weekly (Monday)

Overtime Rule: Weekly

Holiday Rule: US Holidays

Shift Differential Rule: None

Hire Information

Hire Date: 6/1/2012

Release Date:

Accruals

Accrual Plan: Office

Hours	As Of	Start	Accrued	Used	Over	Avail
Unpaid	12/14/2020	8900	0.00	0.00	0.00	8900
Personal	12/14/2020	2200	0.00	0.00	0.00	2200
PTO	12/14/2020	15400	0.00	0.00	0.00	15400
Vacation	12/14/2020	1602.00	9.00	0.00	0.00	1611.00

Default Tracking Levels

Department: Production locked

Customer: Cooking

Operation: None

Class / Grant: None

Region: None

Grouping: Employees

Location: West side

Jobs: None

Compensation

Pay Rate: Current \$11.00

Salary Amount:

Salary Hours:

Modify Salary

Salary Rule: Everyone

Billing

Billing Rate: None

OT1 Billing Rate: Biweekly Staff

OT2 Billing Rate: Everyone

Hourly Employees

Save Cancel

Billing

Billing rate : This field will display any billing rates that and configured for the employee

OT1 Billing rate : This field will display any OT1 rate configured for the employee

OT2 Billing rate : This field will display any OT2 (double) rate configured for the employee

“External” tab contains the following Sections and fields described below.

April Dawn editing employee

General | Employment | **Externals**

WebConnect

Configuration: Self Service Punch

Username: ad

Password: password change required

Confirm Password:

DeskPunch

Password: password change required

Confirm Password:

Clock Identities

Clock Group	Pin	Password	Card Number	Privilege	Finger	Face
66				Employee	<input type="checkbox"/>	<input type="checkbox"/>
Series 100	1			Employee	<input type="checkbox"/>	<input type="checkbox"/>
Tempo face	2			Employee	<input type="checkbox"/>	<input type="checkbox"/>

Unassigned: 88889999 (3G) Assign

User Defined: 3G (99988888) Add

Notifications

Assigned Recipient 1: Joe Boss

Assigned Recipient 2: None

Cancel

WebConnect - WebConnect is an Employee Self-Service tool that can be used for Clocking, Reviewing Timesheets, Adding Notes, Requesting Time Off and Signing Off on their Timecard

Configuration : Use this field to set the WebConnect configuration that is appropriate for this employee.

Username : Employee's WebConnect username (must be unique within Company)

Password : This field will be used to add/modify employee's DeskPunch password

Confirm Password : This field will be used to confirm DeskPunch's password

Password Change Required : Mark this to require the employee to create a new password the next time they log in.

NOTE: If there is a Company Default password, marking this box will also apply the company default password to the Password and Confirm Password fields

DeskPunch - DeskPunch is a kiosk type Status and Clocking software.

Password : This field will be used to add/modify employee's DeskPunch password

Confirm Password : This field will be used to confirm DeskPunch's password

Password Change Required : Mark this to require the employee to create a new password the next time they log in.

NOTE: If there is a Company Default password, marking this box will also apply the company default password to the Password and Confirm Password fields

Clock Identities

The top section shows any Clock Identities currently assigned to the employee. From here, the Pin, Password, Badge Number and Privilege can be modified.

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

April Dawn editing employee

General Employment Externals

WebConnect
Configuration: Self Service Punch
Username: ad
Password: password change required
Confirm Password:

DeskPunch
Password: password change required
Confirm Password:

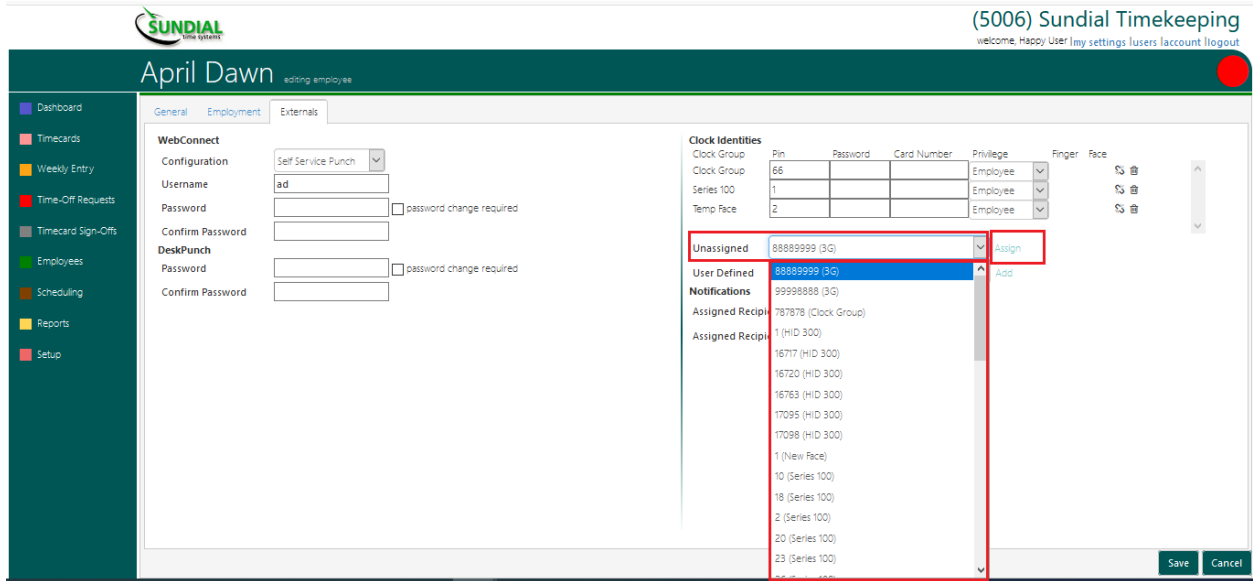
Clock Identities

Clock Group	Pin	Password	Card Number	Privilege	Finger	Face
66				Employee		
Series 100	1			Employee		
Temp Face	2			Employee		

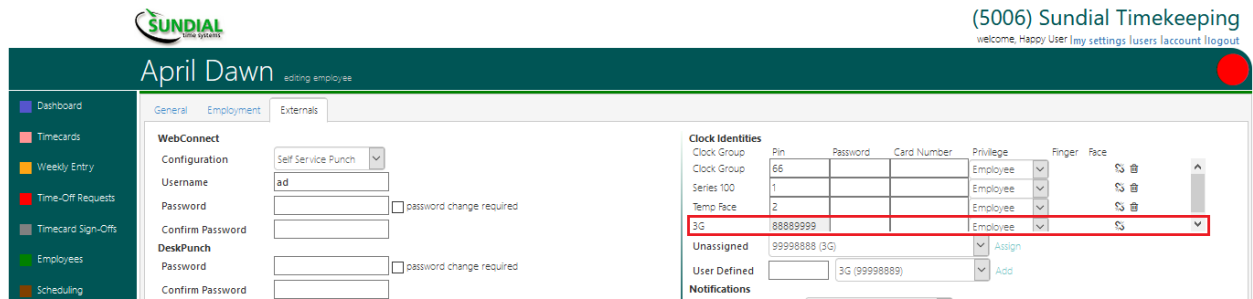
Unassigned: 99998888 (3G) Assign
User Defined: 3G (99998888) Assign

Notifications
Assigned Recipient 1: Joe Boss
Assigned Recipient 2: None

To assign clock identities that are already configured in the system, you need to choose the Identity Pin and from the "Unassigned" dropdown and then click on the "Assign" link next to the dropdown as shown below. Values in (parenthesis) indicate the Clock Group of the identity



Once you click on “Assign” the selected clock gets assigned to the user as shown below

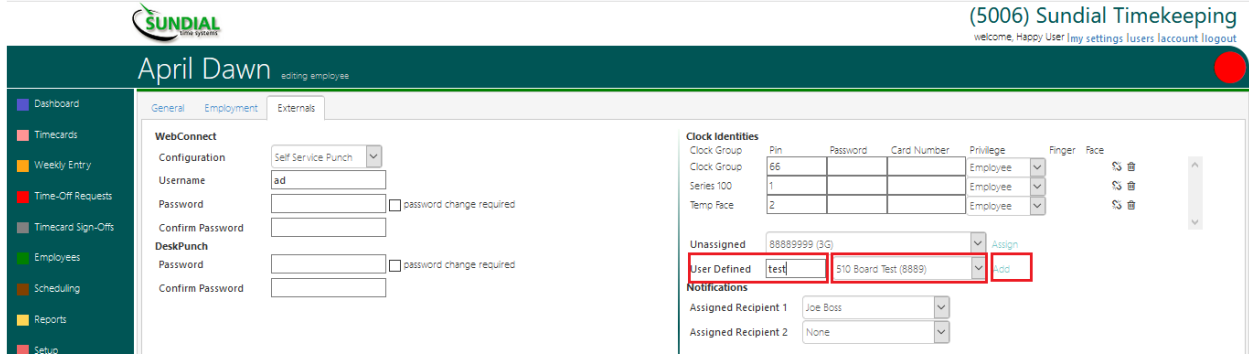


Likewise you can also manually create and assign a new Clock Identity to the employee

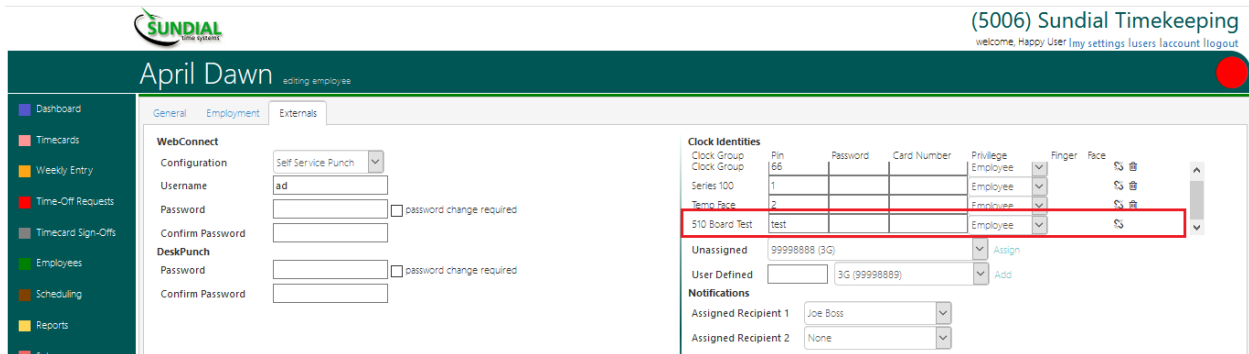
Steps in adding a User Defined clock identity

1. Enter the Employee PIN in the “User Defined” text box
2. Select the Clock Group from the dropdown as shown below
3. click on the “Add” link as shown below

NOTE: Values in (parenthesis) after the Clock Group name indicate the next PIN number in the group, from the highest currently used PIN. It does not attempt to identify or fill gaps in the PIN Numbers.

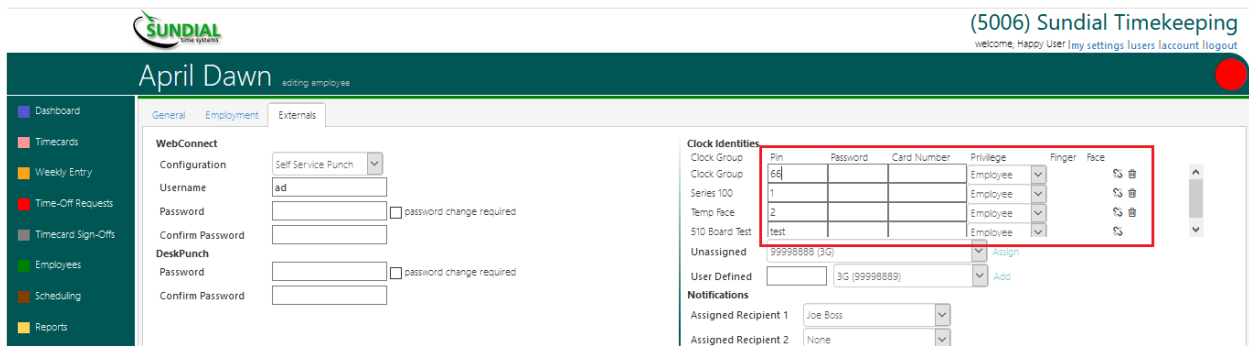


Once you click you **“Add”** the user defined Clock Identity PIN will be added as shown below



Configurations & Controls on Configured Clock Identities

Given below are some other activities that you can configure/modify on the configured clocks



Pin : This field can be used to modify the Pin of the Clock Identity

Password : Using this field you can add/modify password of the Clock Identity

Card Number : This field can be used to add/modify card numbers of the Clock Identity

Privilege : This is a dropdown using which you can set the privileges of the Clock Identity. Below are the privilege that are available to be chosen from

- Employee
- Enroller
- Administrator

Finger : This indicates whether or not the Clock Identity has an associated Fingerprint Template

Face : This indicates whether or not the Clock Identity has an associated Facial Recognition Template.

Icons:

Unlink Identity : Click the Broken Link icon to Unlink the Identity from the Employee. Unlinking does not remove the Identity from the Clock or the Database. Unlinked Identities are added to the Unassigned Identities list.

Delete Identity : Click the Trashcan icon to Delete the Identity from the system. Deleting removes the Identity from the Employee, deletes associated credentials from the database and removes the identity from all clocks in the Clock Group.

Notifications

Assigned Recipients are used by Notifications for Selecting None, All, or Assigned for Time-Off Request Notifications.

Up to two Users can be explicitly assigned to an employee to be notification recipients

Assigned Recipient 1 : Select a User as an Assigned notification recipient

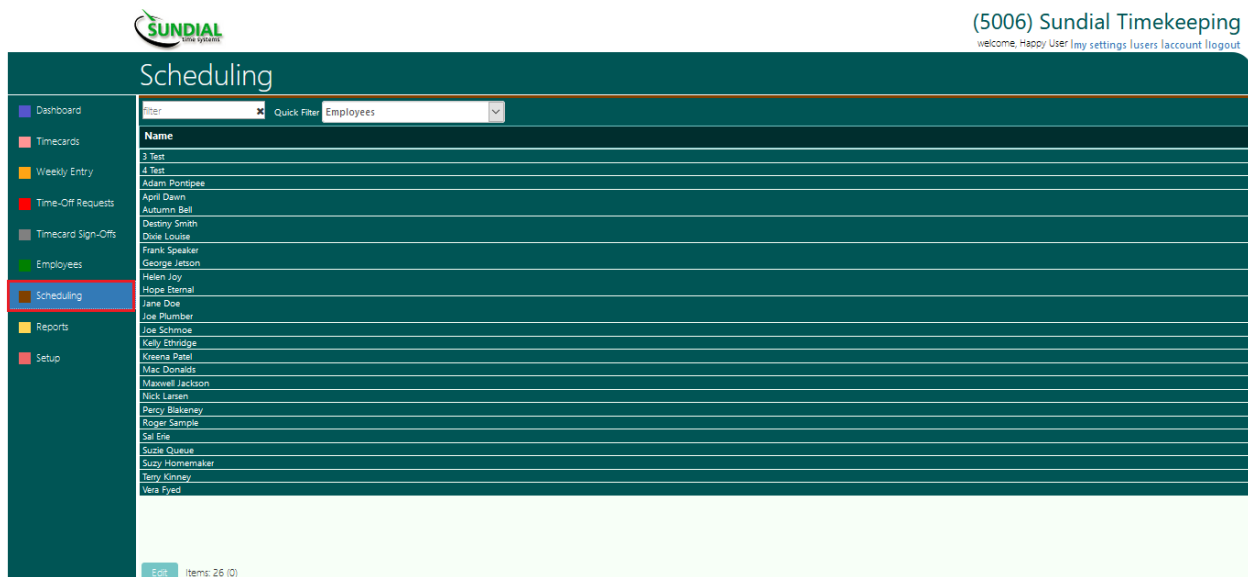
Assigned Recipient 2 : Select a User as an Assigned notification recipient

Once all required changes are done, you need to click on the **“Save”** button for the system to process/apply the changes/modifications made.

5.9. Scheduling area

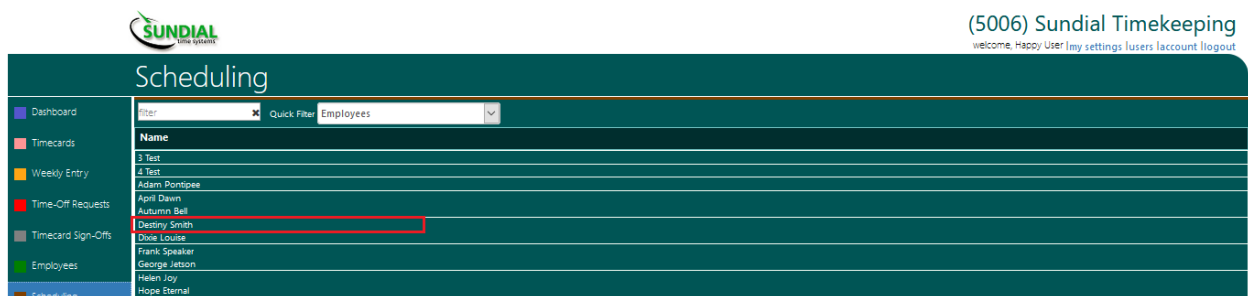
5.9.1. Going in to Schedules

When you click on “**Scheduling**” on the Primary Navigation (Section A), you will be navigated to the “**Scheduling**” section as shown below



5.9.2. Assigning Schedules

You can assign scheduled to an employee simply double clicking on the employees name as shown below



Once you double click on the employee, you will then be navigated to the below screen which will have a calendar view of the schedule of selected employee, as shown below

On the loaded calendar, top section contains the controls which will help you navigate in to different periods as shown below

[Dropdown] Month : Using this dropdown, you can select a past or a future month

[Dropdown] Year : Using this dropdown, you can select a past or future year

[Button] Back Arrow : Using this button, you can navigate back to the previous month/s

[Button] Forward Arrow : Using this button, you can navigate to the next month/s

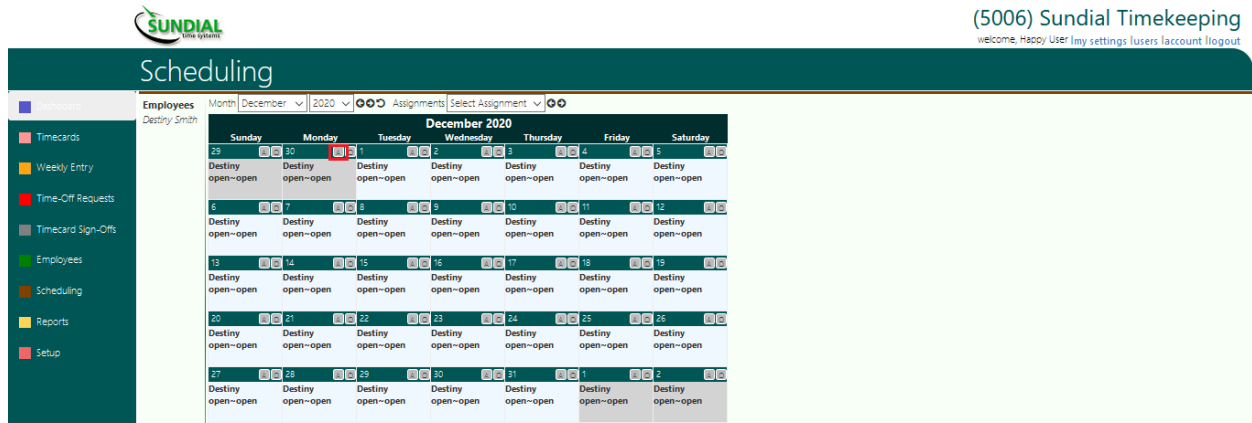
[Button] Rounded Arrow : Using this button, you can navigate back to current month

[Dropdown] Assignments : Using this dropdown, you will be able to jump to any existing schedule assignment

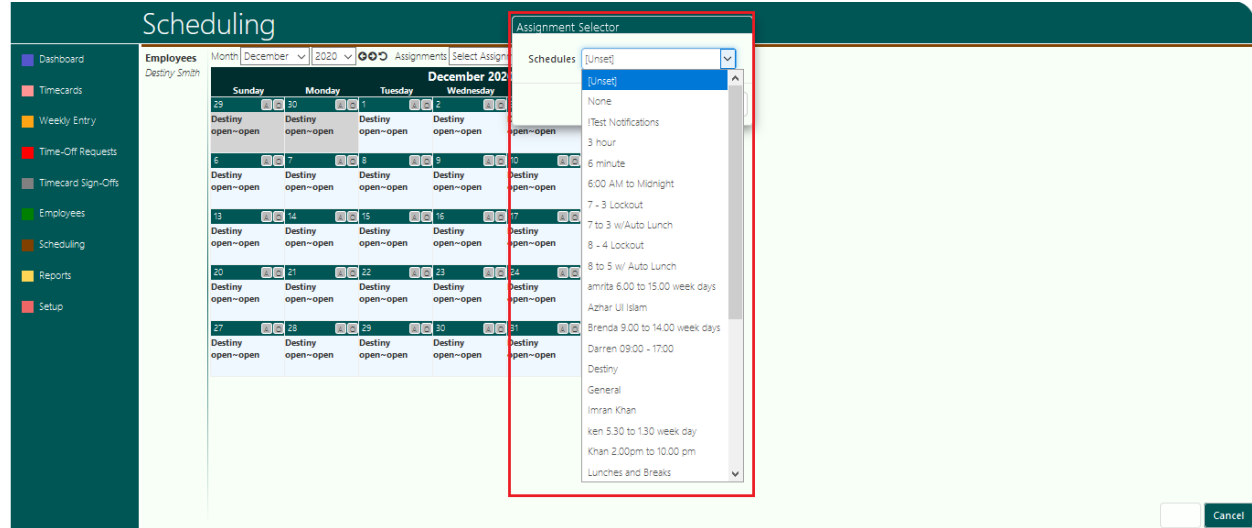
[Button] Back Arrow : Using this button, you can navigate back to the previous assignment from the currently selected one

[Button] Forward Arrow : Using this button, you can navigate in to the next assignment from the currently selected one

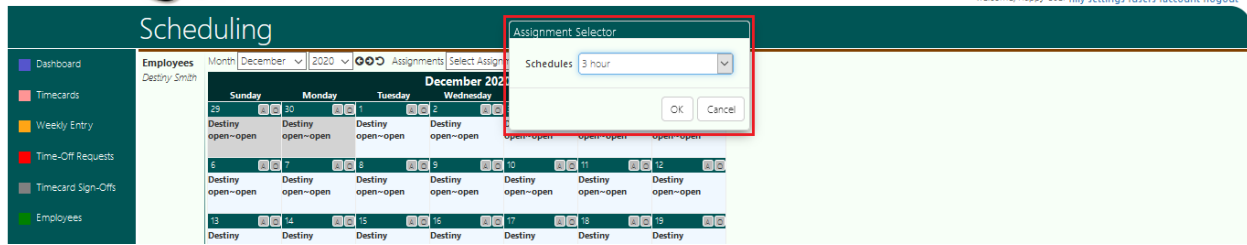
Once the calendar view is loaded, you can click on “A” icon on any individual day on the calendar to assign schedules to the employee as shown below



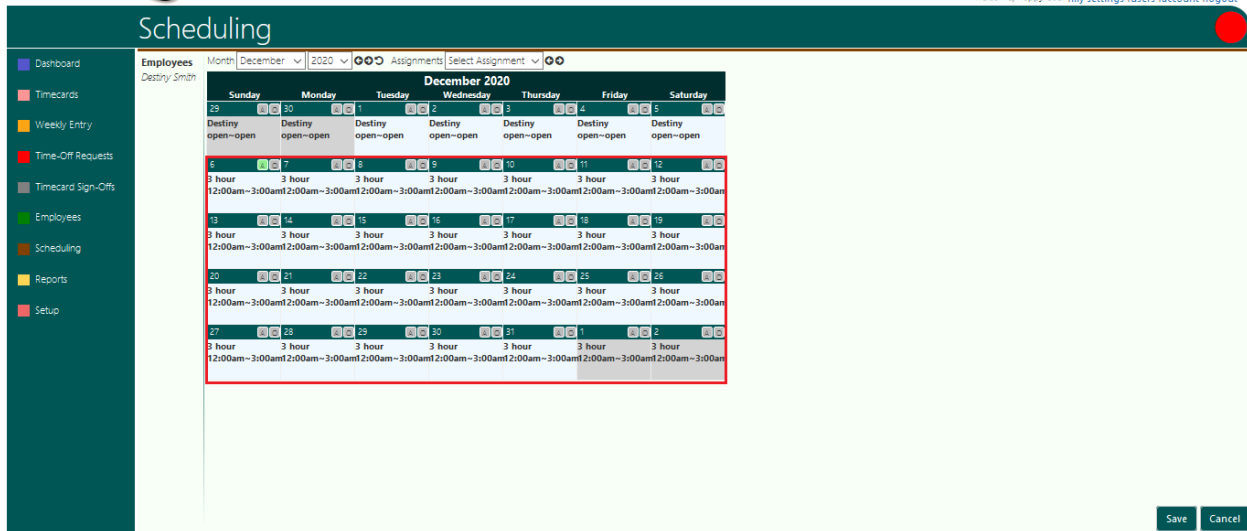
Once the “A” icon is clicked, you will see a pop-up/overlay loaded with a dropdown to select an assignment as shown below



Once the drop down is loaded, you can choose an assignment from it as shown below



When you click “OK” the selected assignment will be applied from that point forward (i.e. if you apply on Sunday the 6th, assignment will be applied from that day onwards for all the future days of the employee”



Once you click on “Save” the records will be saved in the system

5.9.3. Removing Schedule Assignments

When you select “None” from the assignment dropdown, system will remove any schedule assignments from that point forward as shown below

Scheduling

Employees: Destiny Smith

Month: December 2020 | Assignments: Select Assignment

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29 Destiny open-open	30 Destiny open-open	1 Destiny open-open	2 Destiny open-open	3 Destiny open-open	4 Destiny open-open	5 Destiny open-open
6 3 hour 12:00am-3:00am 2:00am-3:00am	7 3 hour 12:00am-3:00am 2:00am-3:00am	8 3 hour 12:00am-3:00am 2:00am-3:00am	9 3 hour 12:00am-3:00am 2:00am-3:00am	10 3 hour 12:00am-3:00am 2:00am-3:00am	11 3 hour 12:00am-3:00am 2:00am-3:00am	12 3 hour 12:00am-3:00am 2:00am-3:00am
13 3 hour 12:00am-3:00am 2:00am-3:00am	14 3 hour 12:00am-3:00am 2:00am-3:00am	15 3 hour 12:00am-3:00am 2:00am-3:00am	16 3 hour 12:00am-3:00am 2:00am-3:00am	17 3 hour 12:00am-3:00am 2:00am-3:00am	18 3 hour 12:00am-3:00am 2:00am-3:00am	19 3 hour 12:00am-3:00am 2:00am-3:00am
20 open-open	21 open-open	22 open-open	23 open-open	24 open-open	25 open-open	26 open-open
27 open-open	28 open-open	29 open-open	30 open-open	31 open-open	1 open-open	2 open-open
open-open	open-open	open-open	open-open	open-open	open-open	open-open

Also, when you select "Unset" from the assignment dropdown, the system will remove the assignment on that date, allowing the previous schedule to flow through as shown below

Scheduling

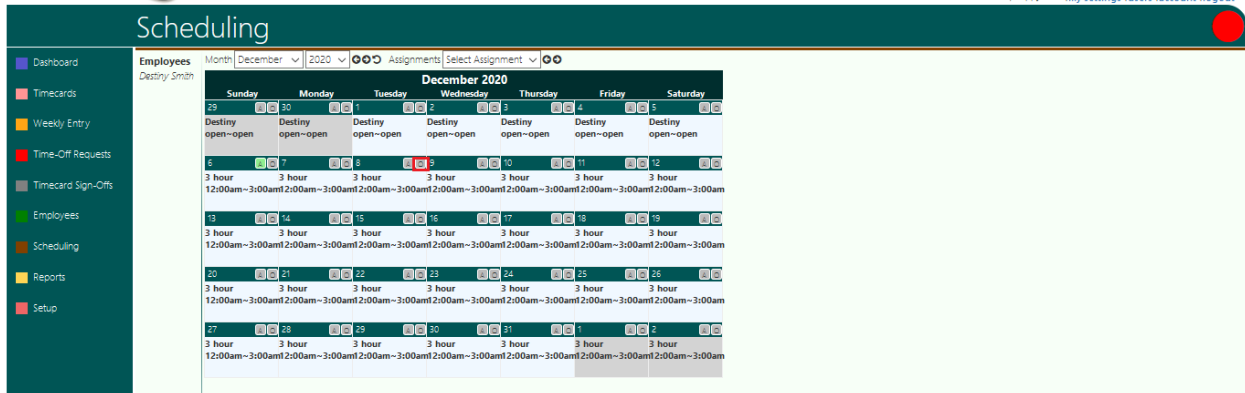
Employees: Destiny Smith

Month: December 2020 | Assignments: Select Assignment

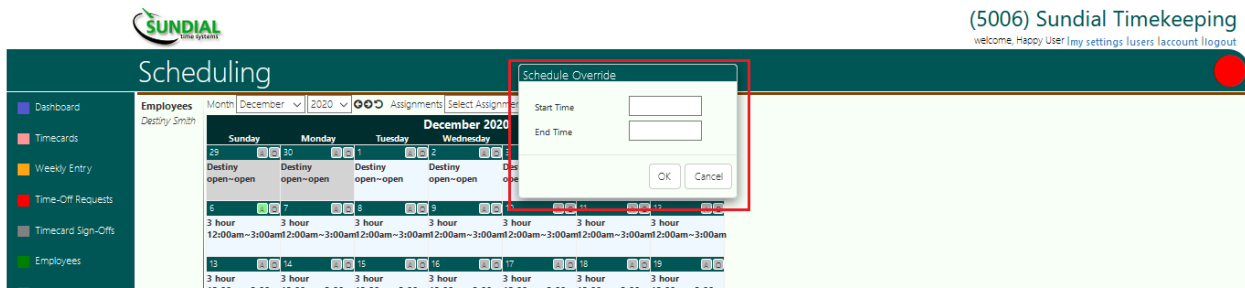
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29 Destiny open-open	30 Destiny open-open	1 Destiny open-open	2 Destiny open-open	3 Destiny open-open	4 Destiny open-open	5 Destiny open-open
6 3 hour 12:00am-3:00am 2:00am-3:00am	7 3 hour 12:00am-3:00am 2:00am-3:00am	8 3 hour 12:00am-3:00am 2:00am-3:00am	9 3 hour 12:00am-3:00am 2:00am-3:00am	10 3 hour 12:00am-3:00am 2:00am-3:00am	11 3 hour 12:00am-3:00am 2:00am-3:00am	12 3 hour 12:00am-3:00am 2:00am-3:00am
13 3 hour 12:00am-3:00am 2:00am-3:00am	14 3 hour 12:00am-3:00am 2:00am-3:00am	15 3 hour 12:00am-3:00am 2:00am-3:00am	16 3 hour 12:00am-3:00am 2:00am-3:00am	17 3 hour 12:00am-3:00am 2:00am-3:00am	18 3 hour 12:00am-3:00am 2:00am-3:00am	19 3 hour 12:00am-3:00am 2:00am-3:00am
20 3 hour 12:00am-3:00am 2:00am-3:00am	21 3 hour 12:00am-3:00am 2:00am-3:00am	22 3 hour 12:00am-3:00am 2:00am-3:00am	23 3 hour 12:00am-3:00am 2:00am-3:00am	24 3 hour 12:00am-3:00am 2:00am-3:00am	25 3 hour 12:00am-3:00am 2:00am-3:00am	26 3 hour 12:00am-3:00am 2:00am-3:00am
27 3 hour 12:00am-3:00am 2:00am-3:00am	28 3 hour 12:00am-3:00am 2:00am-3:00am	29 3 hour 12:00am-3:00am 2:00am-3:00am	30 3 hour 12:00am-3:00am 2:00am-3:00am	31 3 hour 12:00am-3:00am 2:00am-3:00am	1 3 hour 12:00am-3:00am 2:00am-3:00am	2 3 hour 12:00am-3:00am 2:00am-3:00am
3 hour 12:00am-3:00am 2:00am-3:00am	3 hour 12:00am-3:00am 2:00am-3:00am	3 hour 12:00am-3:00am 2:00am-3:00am	3 hour 12:00am-3:00am 2:00am-3:00am	3 hour 12:00am-3:00am 2:00am-3:00am	3 hour 12:00am-3:00am 2:00am-3:00am	3 hour 12:00am-3:00am 2:00am-3:00am

5.9.4. Overriding Schedules

System allows you to override the assignments done in scheduling. In order to override, you need to click on the "O" icon any individual day on the calendar to create an overriding entry shown below



Once the “O” icon is clicked, you will see a pop-up/overlay as shown below

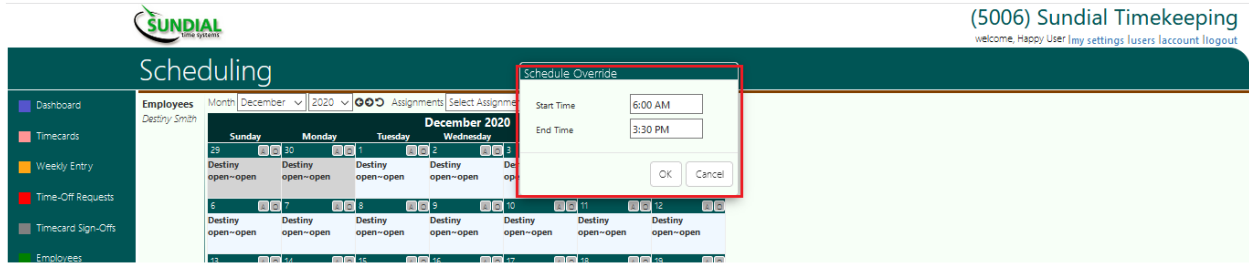


When the pop-up/overlay is loaded, you can key in the “Start Time” and “End time” to override.

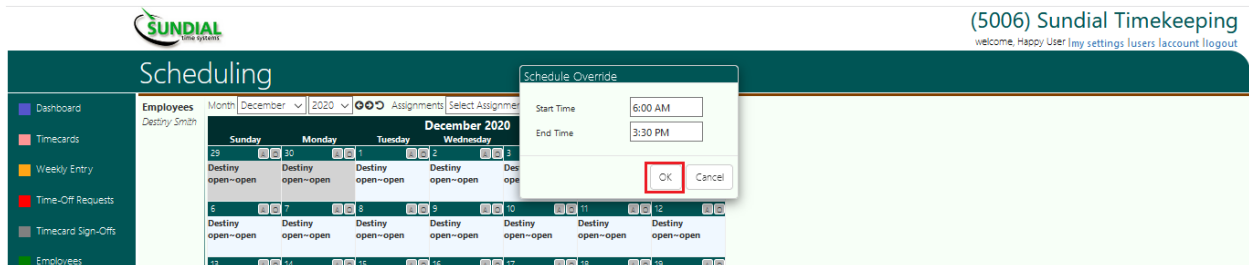
Understanding keyboard entry of Time values.

1. **Time values** - The system accommodates entering time values in both 12 hour and 24 hour format, irrespective of your current display setting.
 - a. If you wish to enter 3:00 PM, you can either key in “15” and click out of the cell and system will automatically take the 24 hour time entry and convert it to 12 hour format and add the time with the required decimal entries
 - b. If you wish to enter a value like 3:30PM, you can either key in “1530” or “3.30p” and the system will take care of the rest in adding colons and conversion from 24 to 12 hours or vice versa.
 - c. One other way you can enter is simply keying in “6p”. Once you click out of the text field, system will automatically turn this in to 6:00PM
2. **Edits** - Once the time is entered, you can make changes if needed.
 - a. If you wish to change 6PM to 6AM, you can simply change the “P” in the text field with “A” and once you click out of the text field, system will process this edit

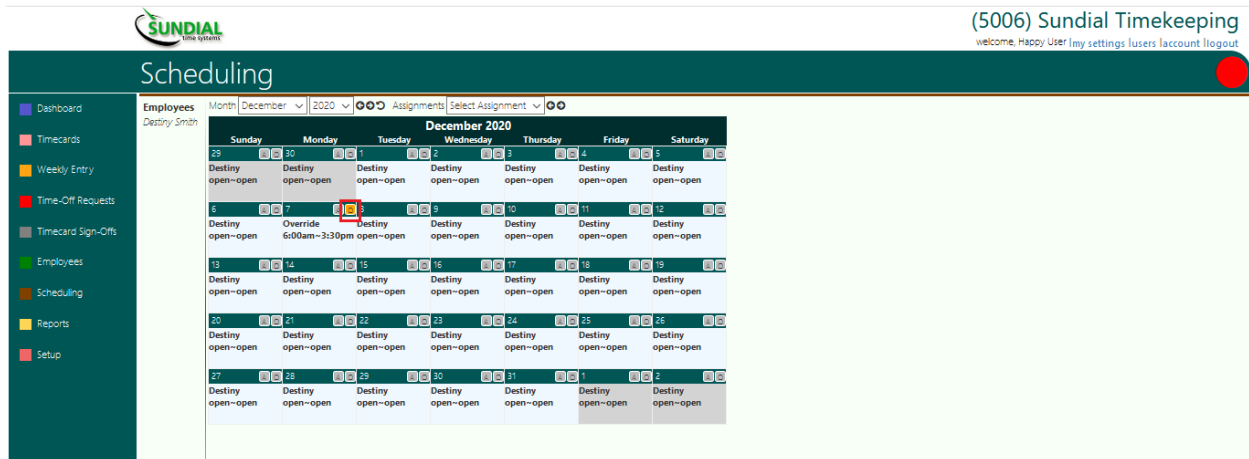
Time entry to the pop-up/overlay is displayed as below



Once the “Start” & “End” times are entered, you can click on the “OK” button as shown below, in order for the system to apply these changes on to the schedule

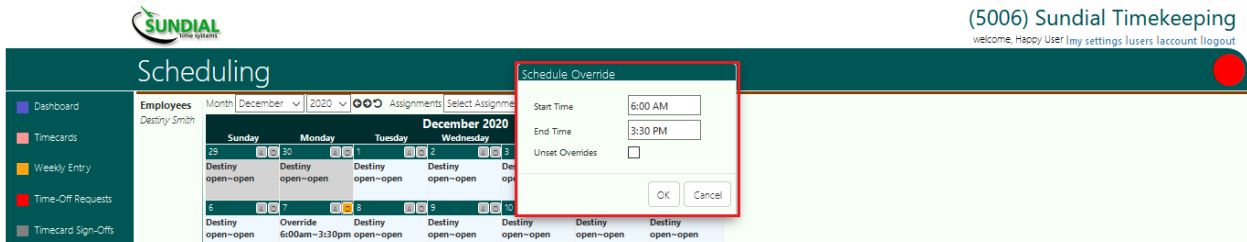


When you click “OK” system will apply the override to the schedule for the **selected day** and the “O” icon on that day will be displayed on “Orange” color as shown below

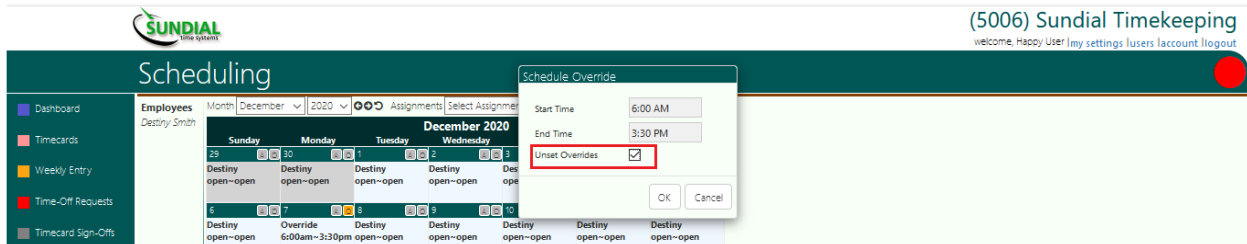


5.9.5. Removing Overrides

To remove an override, you can simply click on the “O” of the overridden day and when this is clicked, system will load an pop-up/overlay as shown below

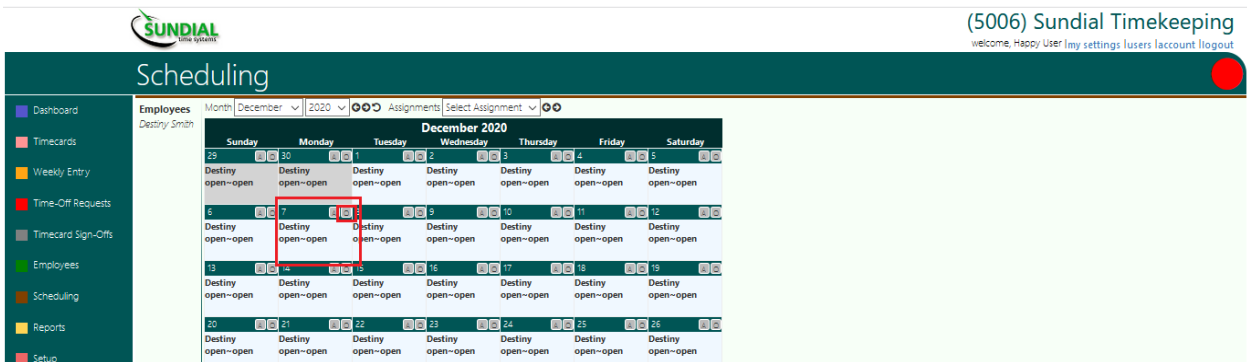


Once the pop-up/overlay is loaded, you can click on the “Unset Overrides” checkbox to remove any overrides applied as shown below



When you click “OK” on this pop-up/overlay, the system will remove any previously applied overrides and put back to the original value it was.

Furthermore the highlighting off the “O” icon will get reset back to its original form as shown below



Once the changes are done, you can click on the “Save” button to save those changes as shown below

Scheduling

Employees: Destiny Smith

Month: December 2020 | Assignments: Select Assignment

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29 Destiny open-open	30 Destiny open-open	1 Destiny open-open	2 Destiny open-open	3 Destiny open-open	4 Destiny open-open	5 Destiny open-open
6 Destiny open-open	7 Destiny open-open	8 Destiny open-open	9 Destiny open-open	10 Destiny open-open	11 Destiny open-open	12 Destiny open-open
13 Destiny open-open	14 Destiny open-open	15 Destiny open-open	16 Destiny open-open	17 Destiny open-open	18 Destiny open-open	19 Destiny open-open
20 Destiny open-open	21 Destiny open-open	22 Destiny open-open	23 Destiny open-open	24 Destiny open-open	25 Destiny open-open	26 Destiny open-open
27 Destiny open-open	28 Destiny open-open	29 Destiny open-open	30 Destiny open-open	31 Destiny open-open	1 Destiny open-open	2 Destiny open-open

Save Cancel

5.9.6. Assigning Group Schedules

System allows you to do “Group” assignments of schedules. In order to do this, you need to select the multiple employees by doing a click with the **control** key pressed in (i.e. **Control + Click**)

When multiple employees are selected, the selected line items will be shaded with a lighter complexion to help you differentiate them from the rest

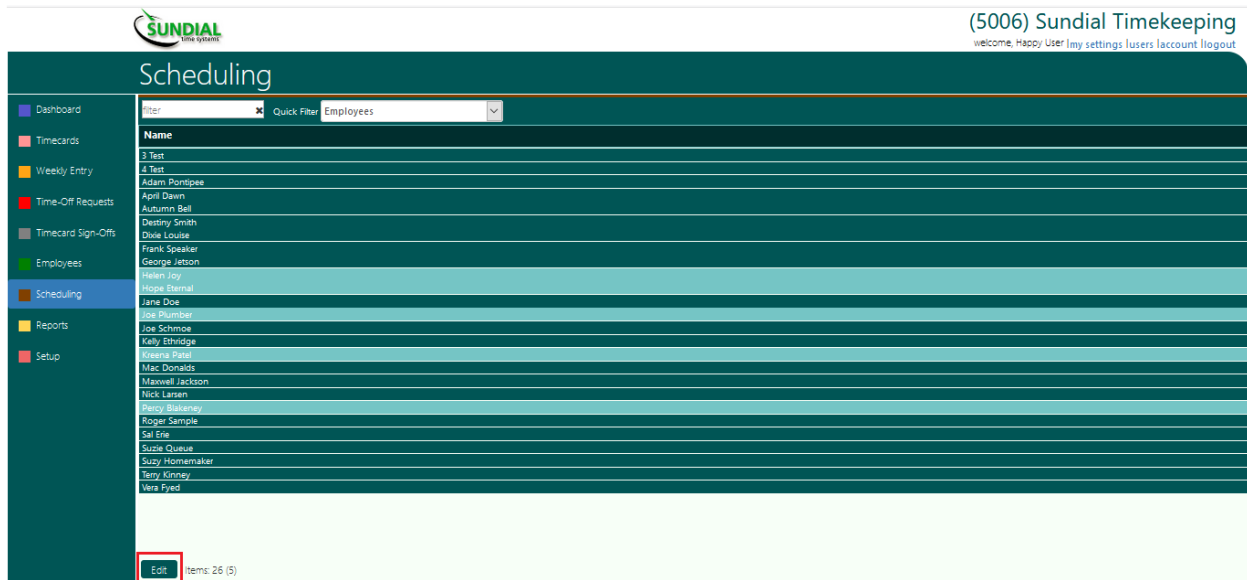
Scheduling

filter: Quick Filter: Employees

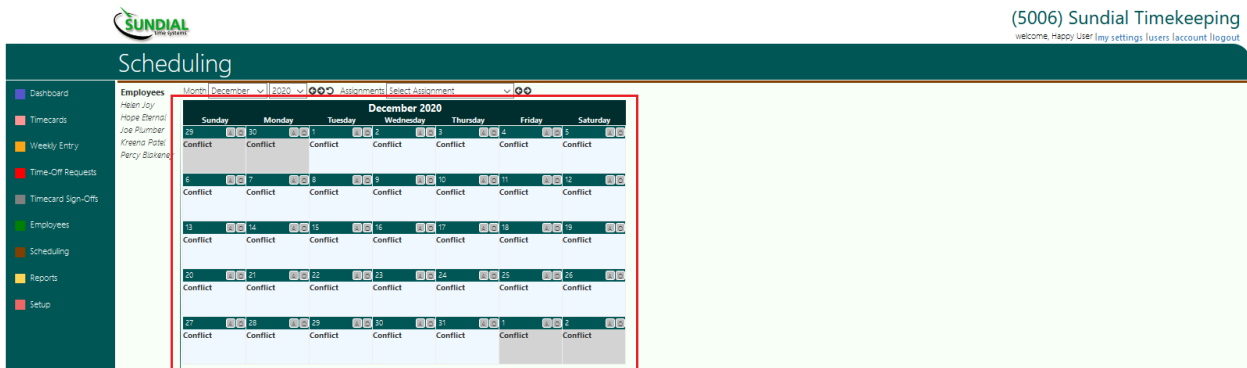
Name
3 Test
J. Test
Adam Paintsee
April Dawn
Autumn Bell
Destiny Smith
Dixie Louise
Frank Speaker
George Johnson
Heidi Jay
Hope Eternal
Jane Doe
Joe Plumber
Joe Schmo
Kelly Stridger
Kristina Peral
Mac Donalds
Maxwell Jackson
Nick Larsen
Terry Blakely
Walter Serrano
Sal Erie
Suzie Queue
Suzy Homemaker
Terry Kinney
Vera Fyed

Items: 26 (5)

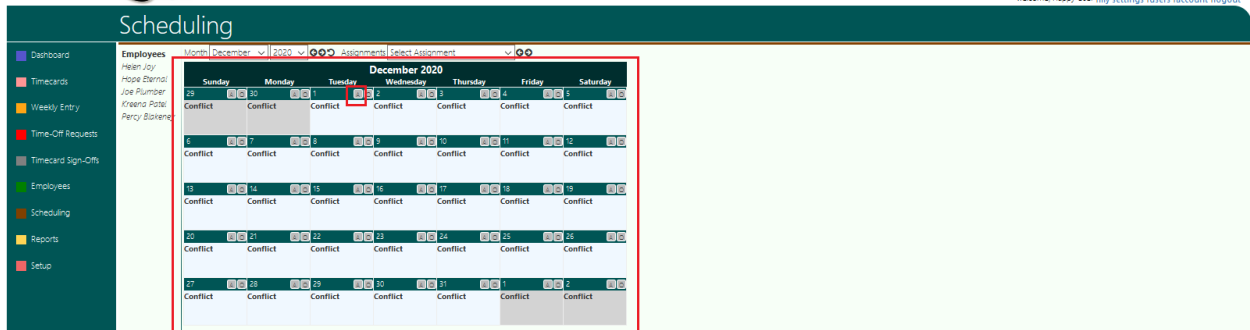
Once the multiple selection is made, you can click on the “Edit” button as shown below



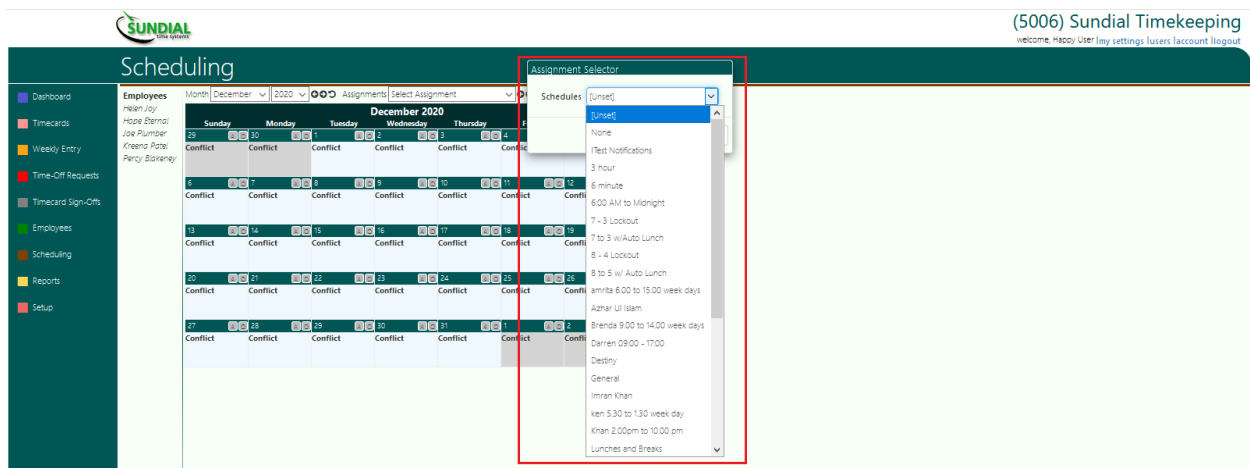
In the event if the previous selections for the users selected are having some **conflicts** the system will display them as **conflicts** as shown below



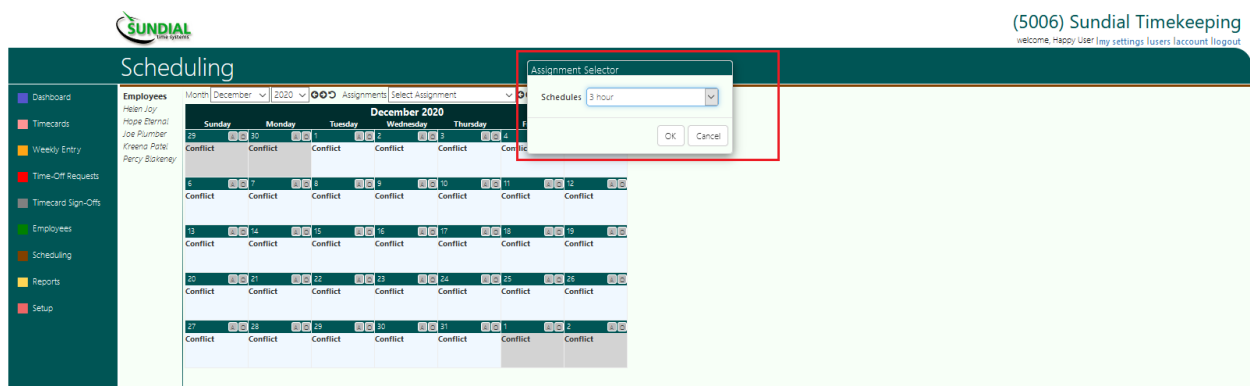
Once the calendar view is loaded, you can click on “A” icon on any individual day on the calendar to assign schedules to the employees as shown below



Once the “A” icon is clicked, you will see a pop-up/overlay loaded with a dropdown to select an assignment as shown below



Once the drop down is loaded, you can choose an assignment from it as shown below



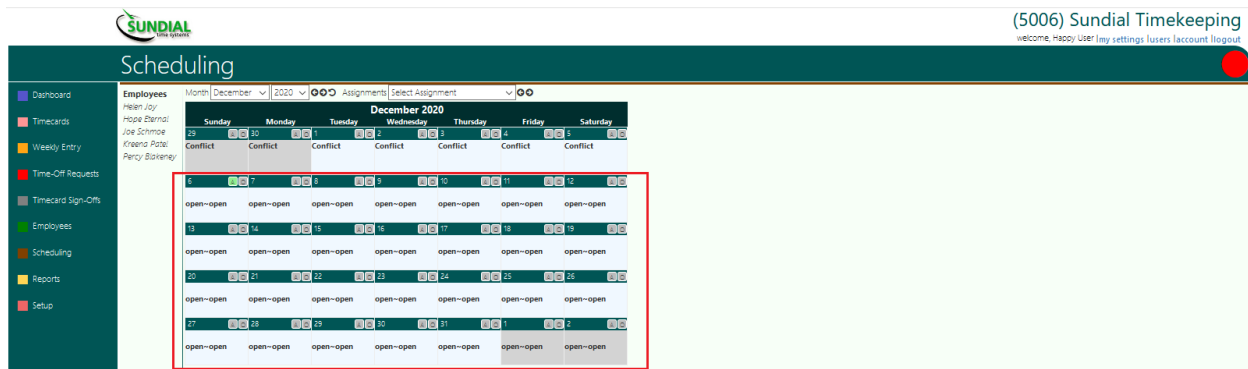
When you click “**Ok**” the selected **assignment will be applied to all the schedules of the selected employees from that point forward** (i.e. if you apply on the 6th Sunday, assignment will be applied from that day onwards for all the future days of the employee”



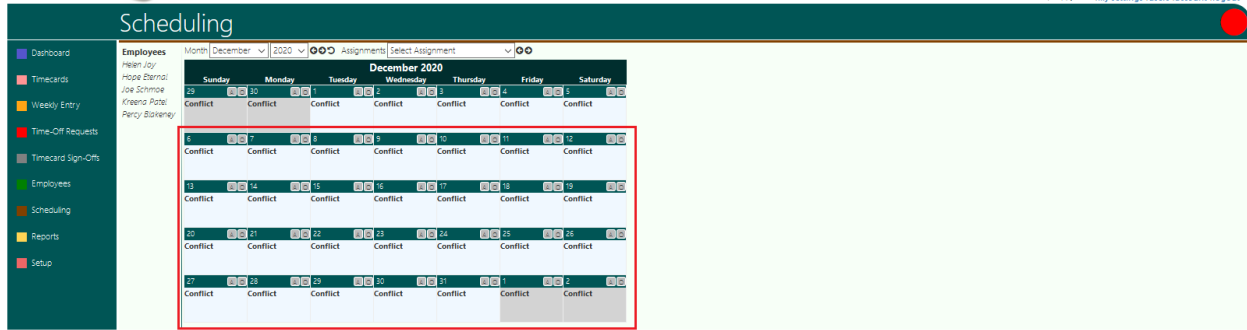
Once you click on “**Save**” the records will be saved in the system

5.9.7. Removing Group Schedule Assignments

When you select “**None**” from the assignment dropdown, system will remove any schedule assignments from that point forward as shown below

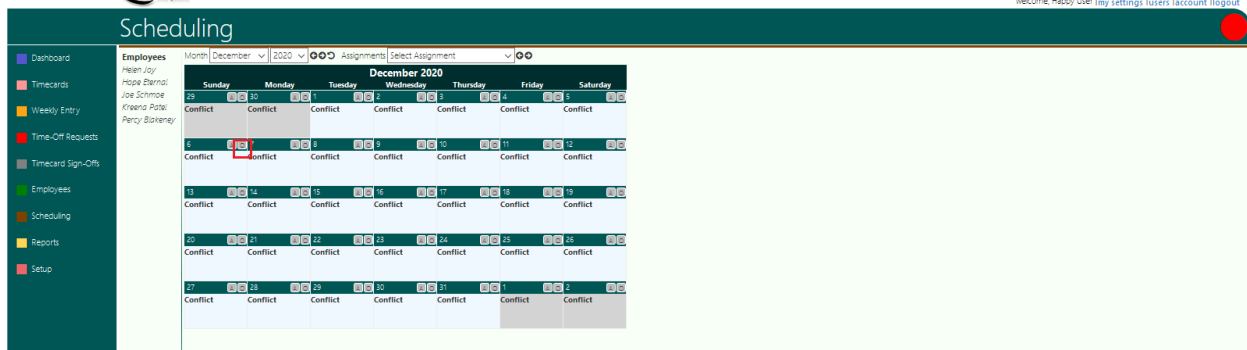


Also, when you select “**Unset**” from the assignment dropdown, system will change the values to the previous value which you changed from as shown below

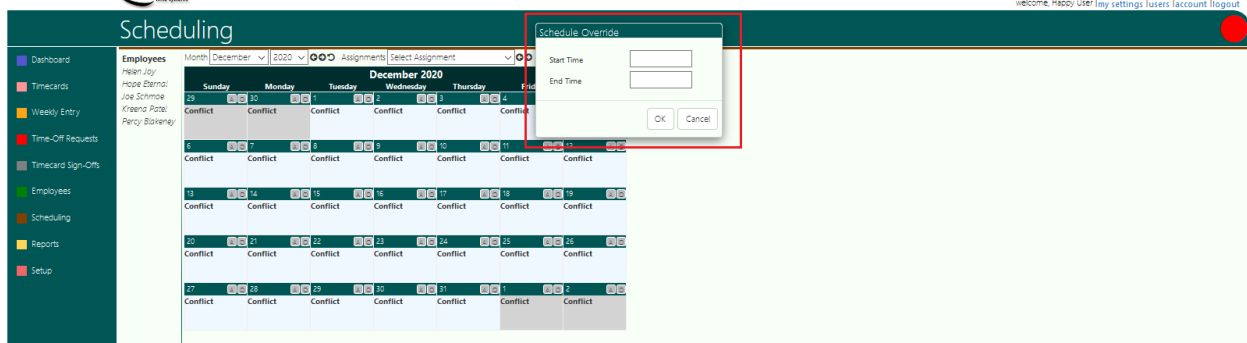


5.9.8. Overriding Bulk Schedules

System allows you to override the assignments done in scheduling for **multiple employees**. In order to override, you need to click on the “O” icon any individual day on the calendar to pass an overriding entry shown below



Once the “O” icon is clicked, you will see a pop-up/overlay as shown below



When the pop-up/overlay is loaded, you can key in the “**Start Time**” and “**End time**” to override.

Understanding keyboard entry of Time values.

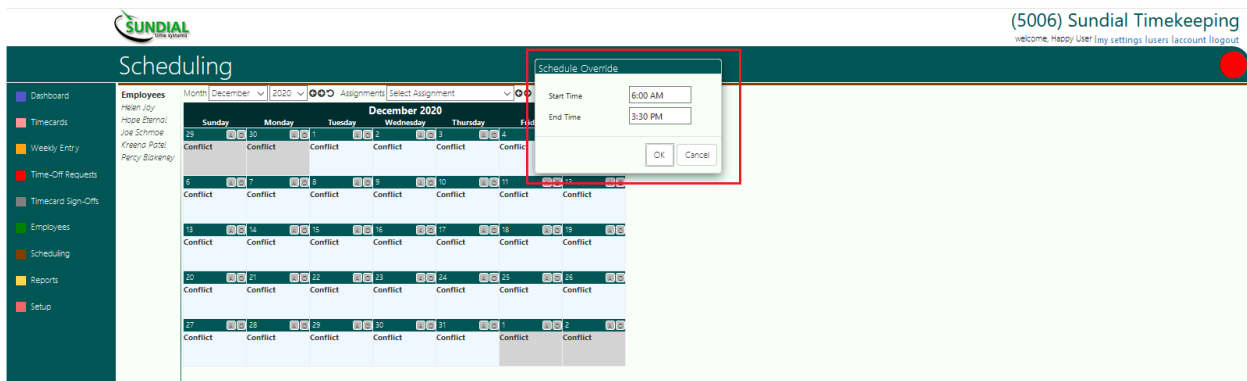
Time values - The system accommodates entering time values in both 12 hour and 24 hour format, irrespective of your current display setting.

- b. If you wish to enter 3:00 PM, you can either key in “15” and click out of the cell and system will automatically take the 24 hour time entry and convert it to 12 hour format and add the time with the required decimal entries
- c. If you wish to enter a value like 3:30PM, you can either key in “1530” or “3.30p” and the system will take care of the rest in adding colons and conversion from 24 to 12 hours or vice versa.
- d. One other way you can enter is simply keying in “6p”. Once you click out of the text field, system will automatically turn this in to 6:00PM

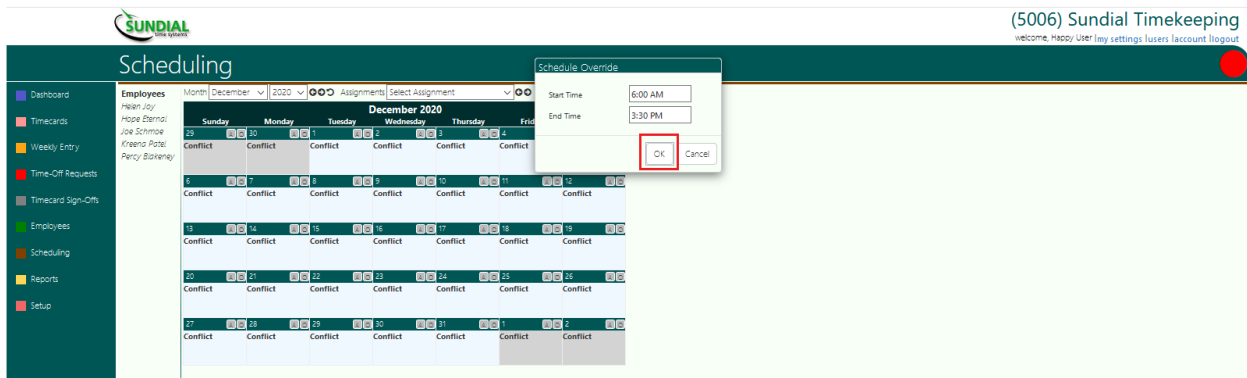
Edits - Once the time is entered, you can make changes if needed.

- e. If you wish to change 6PM to 6AM, you can simply change the “P” in the text field with “A” and once you click out of the text field, system will process this edit

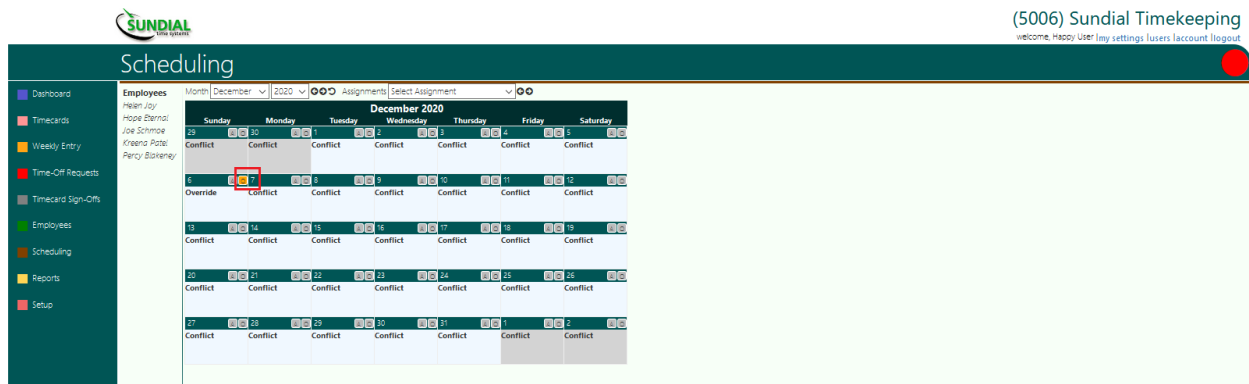
Time entry to the pop-up/overlay is displayed as below



Once the “Start” & “End” times are entered, you can click on the “Ok” button as shown below, in order for the system to apply these changes on to the schedule

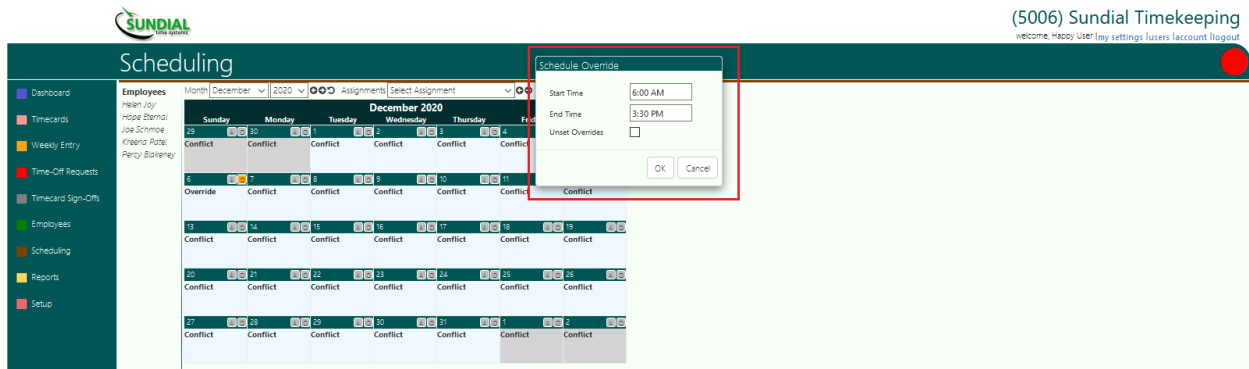


When you click “OK” system will apply the override to the schedule for the **selected day** and the “O” icon on that day will be displayed on “Orange” color as shown below

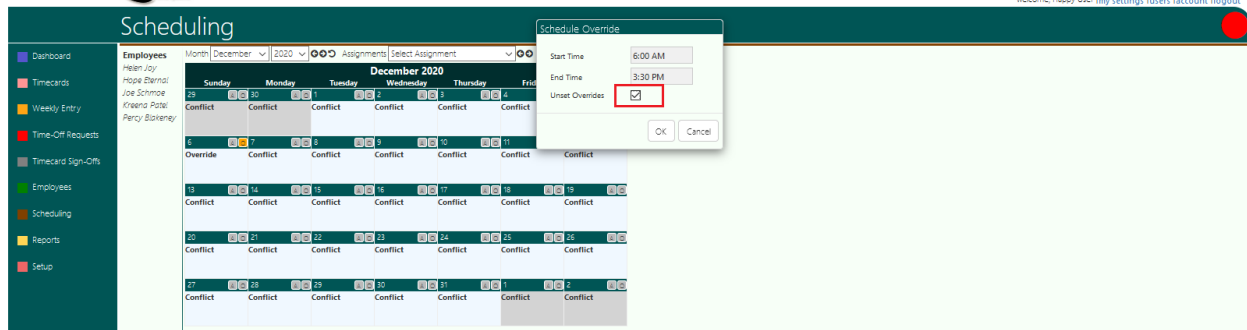


5.9.9. Removing Group Overrides

To remove an override, you can simply click on the “O” of the overridden day and when this is clicked, system will load an pop-up/overlay as shown below

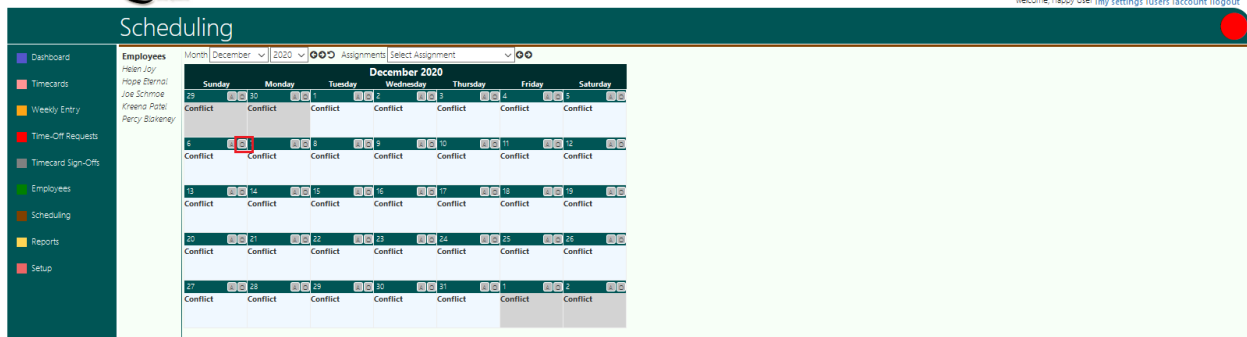


Once the pop-up/overlay is loaded, you can click on the “Unset Overrides” checkbox to remove any overrides applied as shown below



When you click “OK” on this pop-up/overlay, the system will remove any previously applied overrides and put back to the original value it was.

Furthermore the highlighting off the “O” icon will get reset back to its original form as shown below



Once the changes are done, you can click on the “Save” button to save those changes as shown below

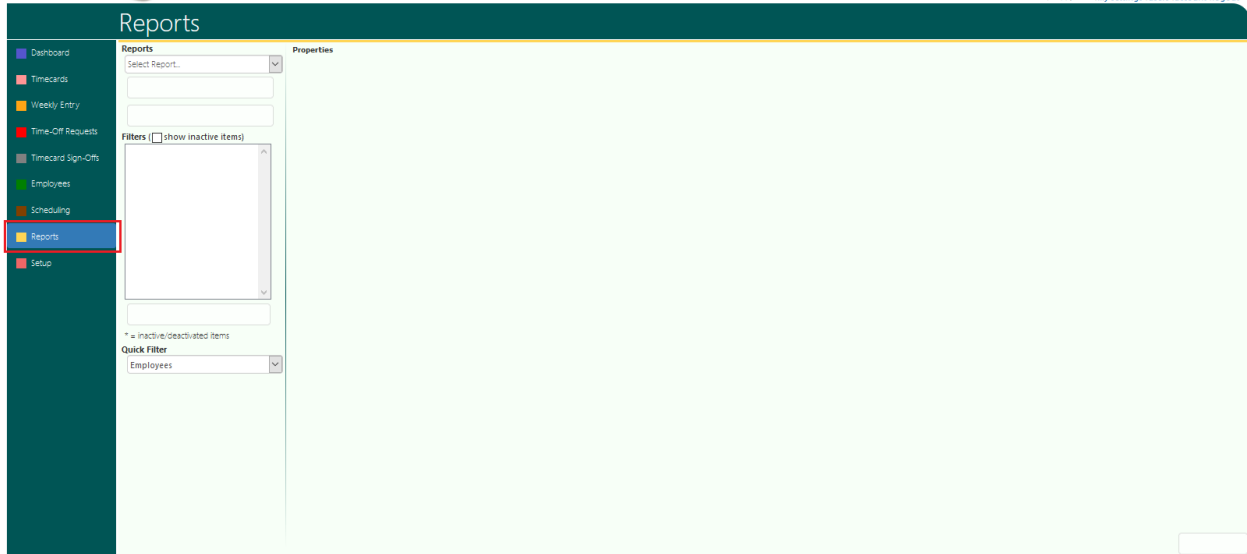
5.10. Reports area

5.10.1. Types of Reports within the system

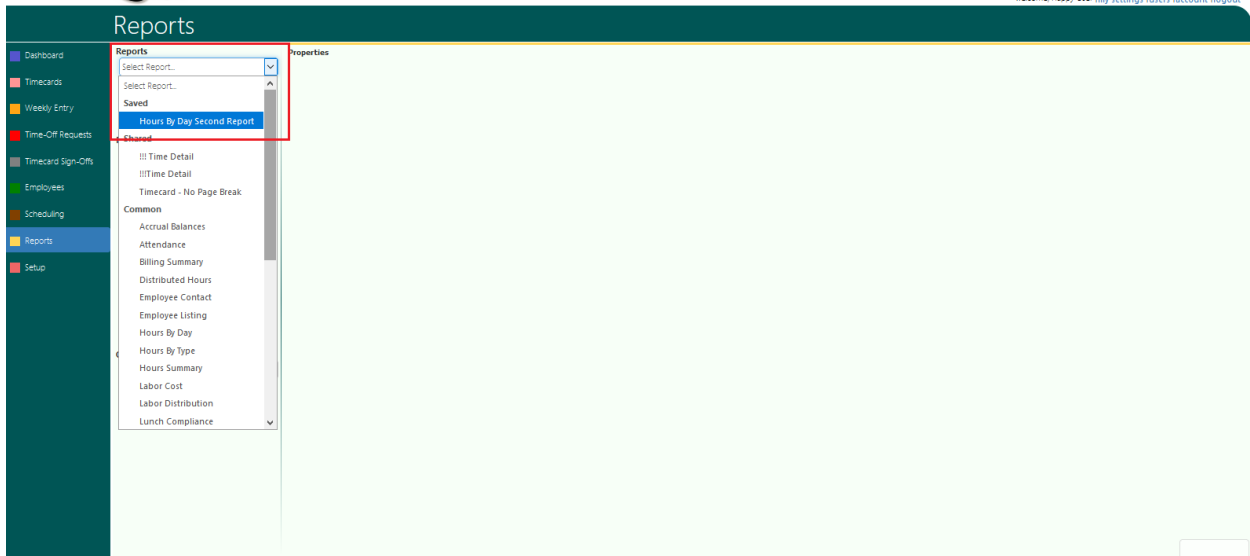
5.10.1.1. Saved Reports

Going in to “**Saved**” Reports

In order to go to “**Saved Reports**” you need to first click on the “**Reports**” on the Primary Navigation (Section A), you will be navigated to the “**Reports**” section as shown below

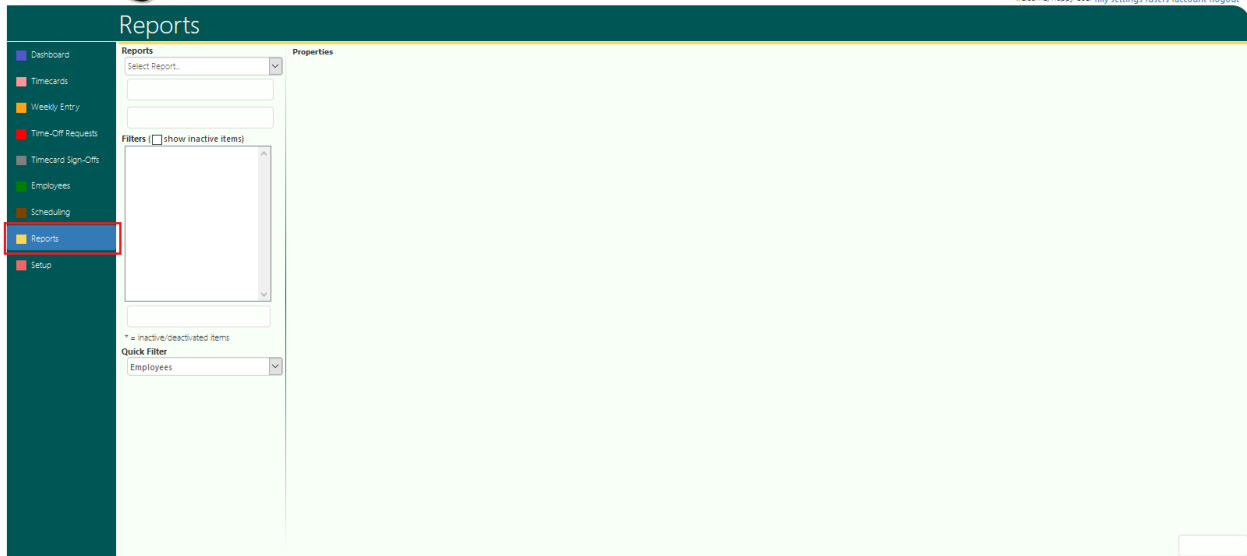


Once you are navigated into the **“Reports”** section, select the required report listed under the **“Saved”** report grouping, from the **“Reports”** dropdown as shown below



5.10.1.2. Shared Reports

In order to go to **“Shared Reports”** you need to first click on the **“Reports”** on the Primary Navigation (Section A), you will be navigated to the **“Reports”** section as shown below

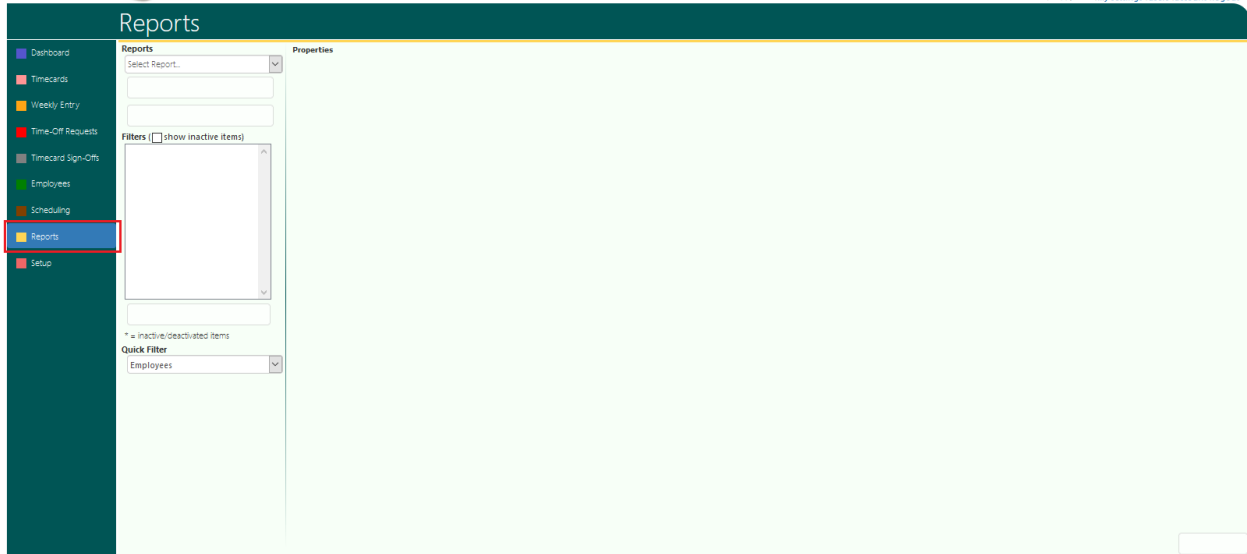


Once you are navigated into the **“Reports”** section, select the required report listed under the **“Shared”** report grouping, from the **“Reports”** dropdown as shown below

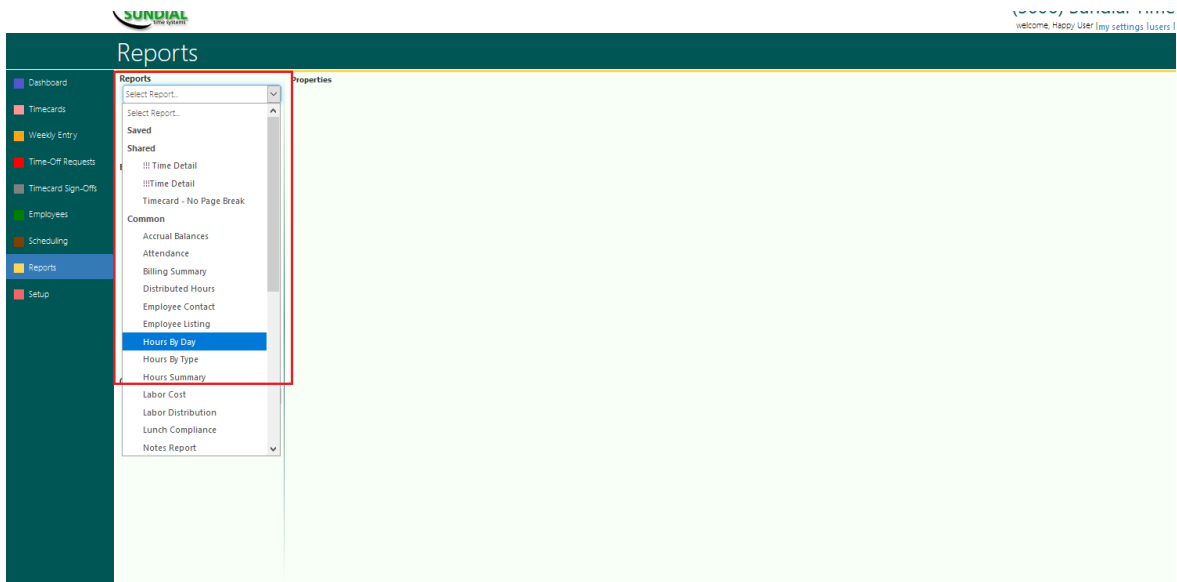


5.10.1.3. Common Reports

In order to go to **“Common Reports”** you need to first click on the **“Reports”** on the Primary Navigation (Section A), you will be navigated to the **“Reports”** section as shown below



Once you are navigated into the “**Reports**” section, select the required report listed under the “**Common**” report grouping, from the “**Reports**” dropdown as shown below



Explanation on a Report listed under common Reports

Given below is an explanation on a report that is listed under the common reports.

Report name : “Hours By Day”

To select this report, load the “**Reports**” dropdown and move to the “**Hours By Day**” report listed under the “**Common**” grouping. Once selected the system will load the selected report on your screen as shown below

The screenshot displays the Sundial Timekeeping software interface. At the top left is the Sundial logo. At the top right, it says "(5006) Sundial Timekeeping" with a link to "welcome, 19602 user, my settings, users, account, logout". The main header is "Reports". On the left is a navigation menu with items: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports (highlighted), and Setup. The main content area is divided into two sections. The left section, titled "Reports", has a dropdown menu set to "Hours By Day" and a "Save Report" button. Below this is a "Date Range Selection" section with a "Current Pay Period" dropdown and a "Filters" section with a "show inactive items" link and an "Edit Filters" button. At the bottom of this section is a "Quick Filter" dropdown set to "Employees". The right section, titled "Properties", contains several configuration options: "Minimum Hours" (text input), "Include Employee Id" (Yes/No dropdown), "Tracking 1" (None dropdown), "Tracking 2" (None dropdown), "Tracking 3" (None dropdown), "Include Hours Types" (No dropdown), and "Show AutoLunch Column" (No dropdown). A red box highlights the "Reports" section on the left.

Properties of a report - Every report has its own properties. When it comes to “**Hours By Day**” report, given below are its properties

Minimum Hours : This field helps you to define the minimum number of hours that needs to be available to be shown on the report. In the context of this report, if you define minimum hours as “**6**” only employees who have 6 hours or more on a given day will be displayed in the report.

Include Employee ID : This is a dropdown which will allow you to select “**Yes**” or “**No**” for including “**Employee ID**” in the report. If you select “**Yes**” the report will include employee ID as a field and if you select “**No**” it will not add the “**Employee ID**” field when the report gets generated

Tracking 1 : This report allows you to add up to **3** “**Tracking Levels**”. Using this dropdown, you will be able to define which “**Tracking Level**” needs to be considered for the **Tracking 1 field** of the report

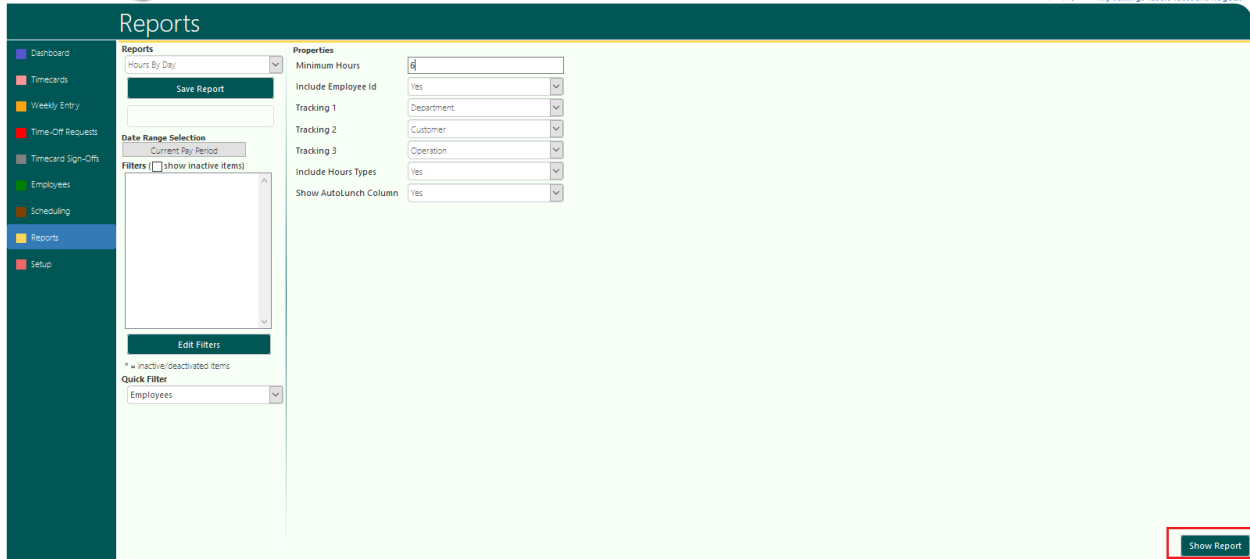
Tracking 2 : This report allows you to add up to **3** “**Tracking Levels**”. Using this dropdown, you will be able to define which “**Tracking Level**” needs to be considered for the **Tracking 2 field** of the report

Tracking 3 : This report allows you to add up to **3** “**Tracking Levels**”. Using this dropdown, you will be able to define which “**Tracking Level**” needs to be considered for the **Tracking 3 field** of the report

Include Hours Type : Using this dropdown, you can choose to include or exclude the “**Hours Type**” from the report. If you choose “**Yes**” the report will display this information when its generated and vice versa

Show AutoLunch Column : Using this dropdown, you can choose to include or exclude the “**AutoLunch**” from the report. If you choose “**Yes**” the report will display this information, when its generated and vice versa

Once you do the selection of the properties, you need to click on the “**Show Report**” button on the screen to view this report as shown below



Note : Some browsers will open this up on a new tab and some will open this up in a new window.

Once you click on **“Show Report”** button the report will be loaded as shown below

1 of 2

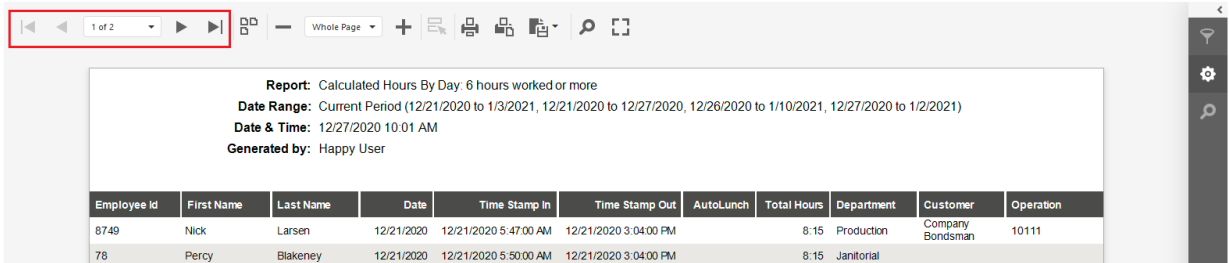
Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 09:50 AM
 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Company Bondsman	10111
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production		
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial		
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse		
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15			
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production		
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance		
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production		
66	April	Dawn	12/21/2020	12/21/2020 7:00:00 AM	12/21/2020 4:06:00 PM		8:06	Production	Cooking	
74	Suzie	Queue	12/21/2020	12/21/2020 8:45:00 AM	12/21/2020 6:00:00 PM		8:16			
72	Destiny	Smith	12/21/2020	12/21/2020 8:48:00 AM	12/21/2020 6:15:00 PM		8:30	Janitorial		
76	Sal	Erie	12/21/2020	12/21/2020 8:52:00 AM	12/21/2020 6:05:00 PM		8:14		Job 4	

Following are some additional options that are available on reports which will allow you to Print the Report, Print only a page of the Report or Explore it to any other format of your choice.

Navigation Arrows

You can use the “Navigation arrows” In order to navigate across the multiple pages of a report as shown below

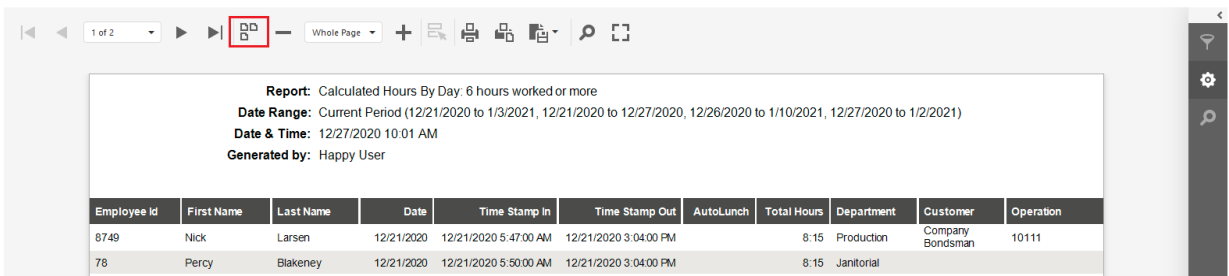


The screenshot shows a report viewer interface. At the top, there is a navigation bar with several icons. A red box highlights the navigation arrows (back, forward, and search) and a dropdown menu showing '1 of 2'. Below the navigation bar, the report content is displayed. The report title is 'Report: Calculated Hours By Day: 6 hours worked or more'. The date range is 'Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)'. The date and time are '12/27/2020 10:01 AM'. The report was generated by 'Happy User'. Below the report summary, there is a table with the following data:

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Company Bondsman	10111
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		

Toggle Multi Page Mode

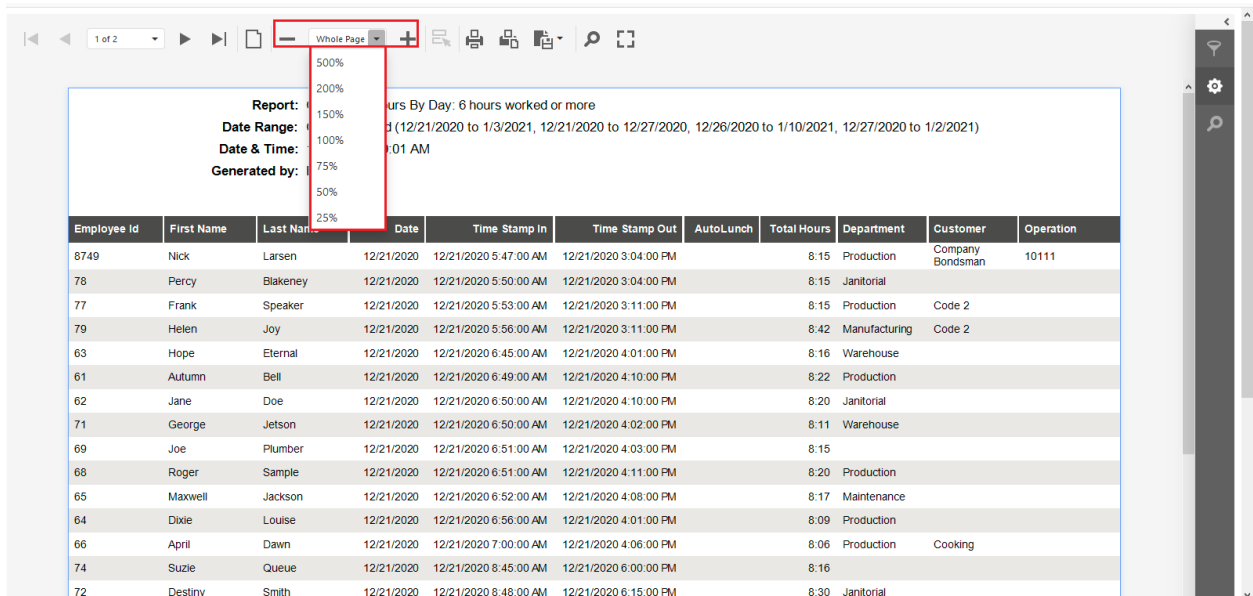
If you need to view the report as a multi page report with the page separators, you can click on the “Toggle Multi Page button” as shown below



The screenshot shows the same report viewer interface as above. A red box highlights the 'Toggle Multi Page' button, which is represented by a document icon with a vertical line through it. The rest of the report content is identical to the previous screenshot.

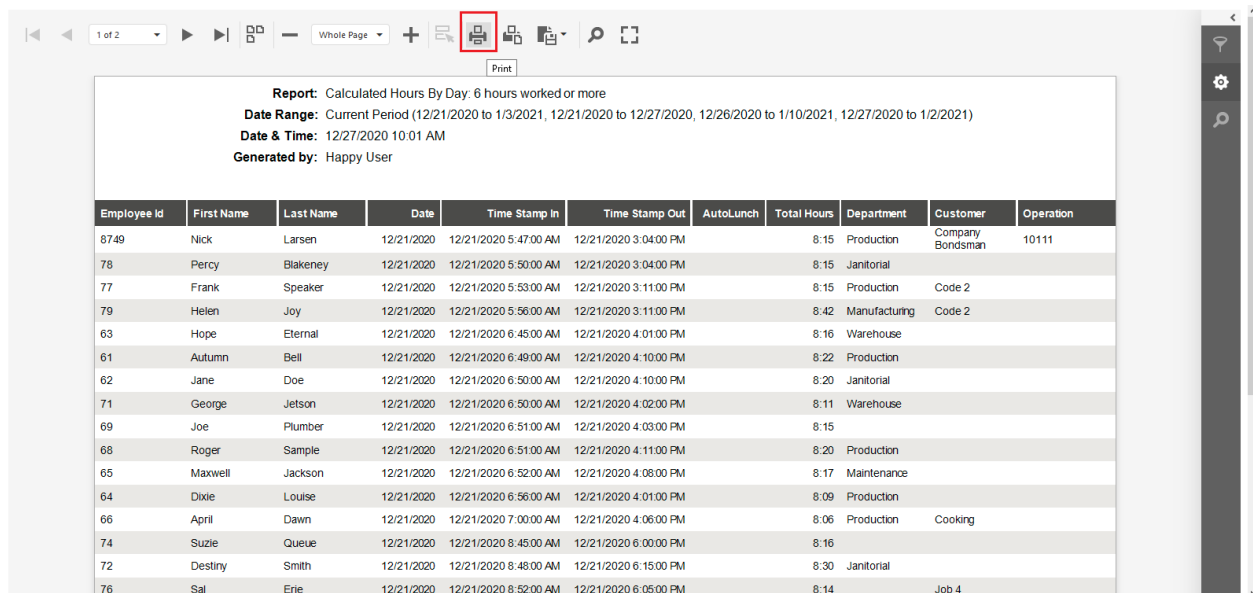
Zoom (in/out) the Report

You can use the (-) & (+) keys to Zoom In/Out the displayed report. Furthermore, using the dropdown, you will be able to select some set/standard Zoom Levels (i.e. 25%, 50%, 250% etc) as shown below



Printing Report

In order to “Print” a report, you need to click on the “Print” button as shown below



Once you click on it, system will load the available printers to choose from which is similar to any other standard printing operation

similar

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Company Bondsman	10111
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production		
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial		
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse		
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15			
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production		
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance		
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production		
66	April	Dawn	12/21/2020	12/21/2020 7:00:00 AM	12/21/2020 4:06:00 PM		8:06	Production	Cooking	
74	Suzie	Queue	12/21/2020	12/21/2020 8:45:00 AM	12/21/2020 6:00:00 PM		8:16			
72	Destiny	Smith	12/21/2020	12/21/2020 8:48:00 AM	12/21/2020 6:15:00 PM		8:30	Janitorial		
76	Sal	Erie	12/21/2020	12/21/2020 8:52:00 AM	12/21/2020 6:05:00 PM		8:14		Job 4	

Once you click on it, system will load the available printers to choose from which is similar to any other standard printing operation

If you like to explore the report, you will need to click on the “Export to” button as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Company Bondsman	10111
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production		
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial		
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse		
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15			
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production		
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance		
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production		
66	April	Dawn	12/21/2020	12/21/2020 7:00:00 AM	12/21/2020 4:06:00 PM		8:06	Production	Cooking	
74	Suzie	Queue	12/21/2020	12/21/2020 8:45:00 AM	12/21/2020 6:00:00 PM		8:16			
72	Destiny	Smith	12/21/2020	12/21/2020 8:48:00 AM	12/21/2020 6:15:00 PM		8:30	Janitorial		
76	Sal	Erie	12/21/2020	12/21/2020 8:52:00 AM	12/21/2020 6:05:00 PM		8:14		Job 4	

Exporting Report

When you click on this button, system will display a list of “Export” options as shown below

Report: Calculated Hours By Day: 6 hours worked or more
Date Range: Current Period (12/21/2020 to 1/3/2021)
Date & Time: 12/27/2020 10:01 AM
Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Company Bondsman	10111
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production		
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial		
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse		
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15			
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production		
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance		
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production		
66	April	Dawn	12/21/2020	12/21/2020 7:00:00 AM	12/21/2020 4:06:00 PM		8:06	Production	Cooking	
74	Suzie	Queue	12/21/2020	12/21/2020 8:45:00 AM	12/21/2020 6:00:00 PM		8:16			
72	Destiny	Smith	12/21/2020	12/21/2020 8:48:00 AM	12/21/2020 6:15:00 PM		8:30	Janitorial		
76	Sal	Erie	12/21/2020	12/21/2020 8:52:00 AM	12/21/2020 6:05:00 PM		8:14		Job 4	

Once you select the output option from the dropdown, system will then export the report accordingly which is similar to any standard export option.

Searching on Report

In order to search something on the report, you can simply click on the “Search” button as shown below

Report: Calculated Hours By Day: 6 hours worked or more
Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
Date & Time: 12/27/2020 10:01 AM
Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Company Bondsman	10111
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		

Once you click on the “Search” button, system will display a search pane on the right side of the screen as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Custom
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bondsr
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	

Using this, you can key in a “search value” and once you click outside the “Search Text field” system will then highlight on screen any available search results. Furthermore, it will list down all search results on the right side search pane as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Custom
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bondsr
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse	
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production	

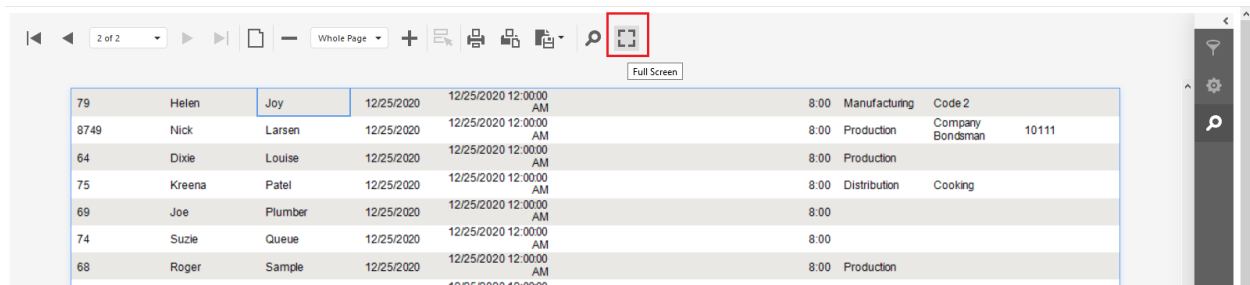
You can use the arrow heads on the right side search pane to navigate in to the other search results as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

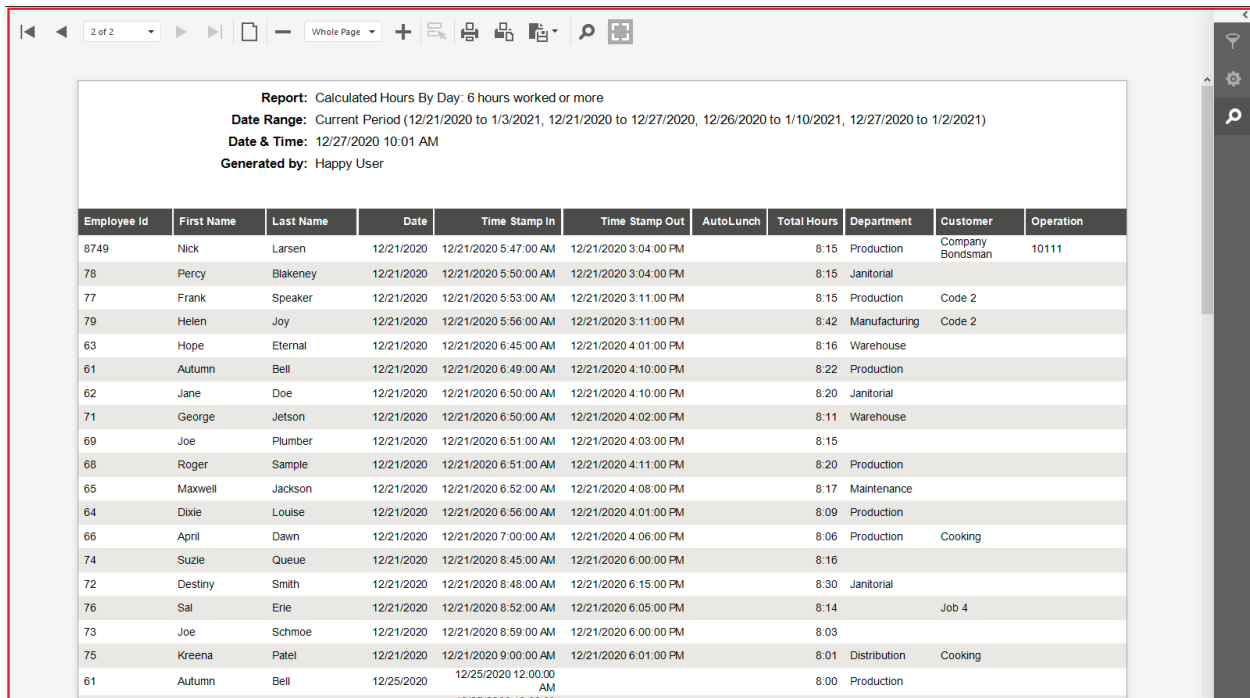
Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Custom
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bondsr
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse	
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production	
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial	
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse	

Viewing Report on Full Screen

In order to view the report on “Full Screen” you need to click on the “Full Screen” button as shown below



When you click on the “Full Screen” button, system will display the report on “Full Screen Mode” as shown below



You can press on the “Escape” key on your keyboard to exit from the “Full Screen mode”

Understanding the Right Side Pane on the Reports

There is a right side pane on the reports screen which can be expanded by clicking the “Left pointed” arrow head as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa	Bondsr
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production		
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial		
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse		
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15			
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production		
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance		
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production		
66	April	Dawn	12/21/2020	12/21/2020 7:00:00 AM	12/21/2020 4:06:00 PM		8:06	Production	Cookin	
74	Suzie	Queue	12/21/2020	12/21/2020 8:45:00 AM	12/21/2020 6:00:00 PM		8:16			
72	Destiny	Smith	12/21/2020	12/21/2020 8:48:00 AM	12/21/2020 6:15:00 PM		8:30	Janitorial		

When you click on this the system will expand the reports pane as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
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 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
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78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production		
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial		
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse		
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15			
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production		
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance		
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production		
66	April	Dawn	12/21/2020	12/21/2020 7:00:00 AM	12/21/2020 4:06:00 PM		8:06	Production	Cookin	
74	Suzie	Queue	12/21/2020	12/21/2020 8:45:00 AM	12/21/2020 6:00:00 PM		8:16			
72	Destiny	Smith	12/21/2020	12/21/2020 8:48:00 AM	12/21/2020 6:15:00 PM		8:30	Janitorial		

PREVIEW PARAMETERS

Report Name: Calculated Hours By Day: 6 ho ...

User Name: Happy User

Generation Timest...: 12/27/2020, 10:01 AM

Label: Report:

Generation Time: Date & Time:

Generated by: Generated by:

Report Date Range: Current Period (12/21/2020 to ...

Date range label: Date Range:

RESET SUBMIT

To collapse this back, you can simply click on the "Right Pointed" arrow head as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
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 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
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77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		
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69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15			
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production		
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance		
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production		
66	April	Dawn	12/21/2020	12/21/2020 7:00:00 AM	12/21/2020 4:06:00 PM		8:06	Production	Cookin	
74	Suzie	Queue	12/21/2020	12/21/2020 8:45:00 AM	12/21/2020 6:00:00 PM		8:16			
72	Destiny	Smith	12/21/2020	12/21/2020 8:48:00 AM	12/21/2020 6:15:00 PM		8:30	Janitorial		

This pane contains **3 different icons** towards the extreme right side of the screen as shown below

Report: Calculated Hours By Day: 6 hours worked or more
Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
Date & Time: 12/27/2020 10:01 AM
Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer	Operation
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Company Bondsman	10111
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial		
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2	
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2	
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse		

Icon 1 (Funnel) : Clicking this will take you to the “**Preview Parameters**” as shown below

Report: Calculated Hours By Day: 6 hours worked or more
Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
Date & Time: 12/27/2020 10:01 AM
Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bondsman
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse	
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production	
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial	

PREVIEW PARAMETERS

Report Name: Calculated Hours By Day: 6 ho ...

User Name: Happy User

Generation Time: 12/27/2020, 10:01 AM

Label: Report:

Generation Time: Date & Time:

Generated by: Generated by:

Report Date Range: Current Period (12/21/2020 to ...

Date range label: Date Range:

RESET SUBMIT

Icon 2 (Gear Lever) : Clicking this will list down all the export options as show below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Custom
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bondsr
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	
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79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse	
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production	
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial	
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse	
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15		

- EXPORT OPTIONS
 - CSV EXPORT OPTIONS
 - HTML EXPORT OPTIONS
 - IMAGE EXPORT OPTIONS
 - MHT EXPORT OPTIONS
 - PDF EXPORT OPTIONS
 - RTF EXPORT OPTIONS
 - TEXT EXPORT OPTIONS
 - XLS EXPORT OPTIONS
 - XLSX EXPORT OPTIONS
 - DOCK EXPORT OPTIONS

To view more details on each export option you will need to click on the **“Right Pointed Arrow head”** appearing **in front** of each export option as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
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 Generated by: Happy User

Employee Id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Custom
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bondsr
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse	
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production	
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial	
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse	
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15		

- EXPORT OPTIONS
 - CSV EXPORT OPTIONS
 - HTML EXPORT OPTIONS
 - IMAGE EXPORT OPTIONS
 - MHT EXPORT OPTIONS
 - PDF EXPORT OPTIONS
 - RTF EXPORT OPTIONS
 - TEXT EXPORT OPTIONS
 - XLS EXPORT OPTIONS
 - XLSX EXPORT OPTIONS
 - DOCK EXPORT OPTIONS

When you click on this, system will expand the details pertinent to that **export option**, as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bonds
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse	
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production	
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial	
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse	
69	Joe	Plumber	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:03:00 PM		8:15		
68	Roger	Sample	12/21/2020	12/21/2020 6:51:00 AM	12/21/2020 4:11:00 PM		8:20	Production	
65	Maxwell	Jackson	12/21/2020	12/21/2020 6:52:00 AM	12/21/2020 4:08:00 PM		8:17	Maintenance	
64	Dixie	Louise	12/21/2020	12/21/2020 6:56:00 AM	12/21/2020 4:01:00 PM		8:09	Production	

EXPORT OPTIONS

- CSV EXPORT OPTIONS
 - Encoding: Windows-1252
 - Text Export Mo...: Text
 - Quote Strings ...:
 - Separator: , (Using System Separator)
 - Skip Empty Ro...:
 - Skip Empty Col...:
- HTML EXPORT OPTIONS
- IMAGE EXPORT OPTIONS
- MBF EXPORT OPTIONS
- PDF EXPORT OPTIONS
- RTF EXPORT OPTIONS
- TEXT EXPORT OPTIONS
- XLS EXPORT OPTIONS
- XLSX EXPORT OPTIONS
- DOCK EXPORT OPTIONS

Icon 3 (Magnifying Glass) : When you click on this, it will load the search pane as shown below

Report: Calculated Hours By Day: 6 hours worked or more
 Date Range: Current Period (12/21/2020 to 1/3/2021, 12/21/2020 to 12/27/2020, 12/26/2020 to 1/10/2021, 12/27/2020 to 1/2/2021)
 Date & Time: 12/27/2020 10:01 AM
 Generated by: Happy User

Employee id	First Name	Last Name	Date	Time Stamp In	Time Stamp Out	AutoLunch	Total Hours	Department	Customer
8749	Nick	Larsen	12/21/2020	12/21/2020 5:47:00 AM	12/21/2020 3:04:00 PM		8:15	Production	Compa Bonds
78	Percy	Blakeney	12/21/2020	12/21/2020 5:50:00 AM	12/21/2020 3:04:00 PM		8:15	Janitorial	
77	Frank	Speaker	12/21/2020	12/21/2020 5:53:00 AM	12/21/2020 3:11:00 PM		8:15	Production	Code 2
79	Helen	Joy	12/21/2020	12/21/2020 5:56:00 AM	12/21/2020 3:11:00 PM		8:42	Manufacturing	Code 2
63	Hope	Eternal	12/21/2020	12/21/2020 6:45:00 AM	12/21/2020 4:01:00 PM		8:16	Warehouse	
61	Autumn	Bell	12/21/2020	12/21/2020 6:49:00 AM	12/21/2020 4:10:00 PM		8:22	Production	
62	Jane	Doe	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:10:00 PM		8:20	Janitorial	
71	George	Jetson	12/21/2020	12/21/2020 6:50:00 AM	12/21/2020 4:02:00 PM		8:11	Warehouse	

SEARCH

SEARCH RESULT

Saving a Report

To save a report, you can click on the **“Save Report”** button as shown below

SUNDIAL Timekeeping
 (506) Sundial Timekeeping
 welcome happy user / my settings / users / account / logout

Reports

Reports: Hours By Day

Save Report

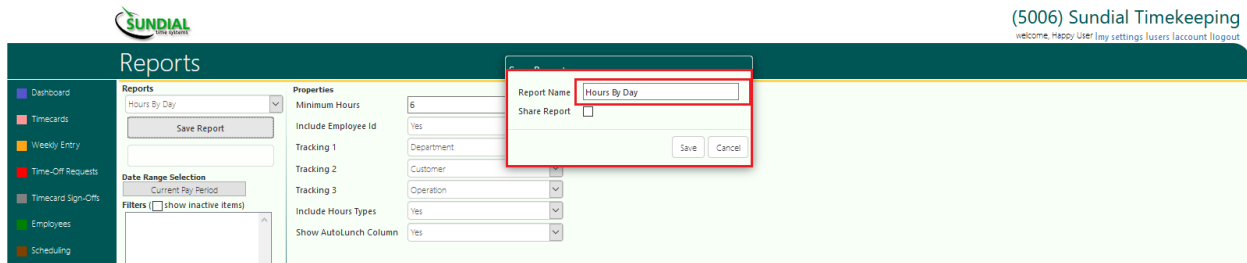
Date Range Selection: Current Pay Period

Filters (show inactive items)

Properties

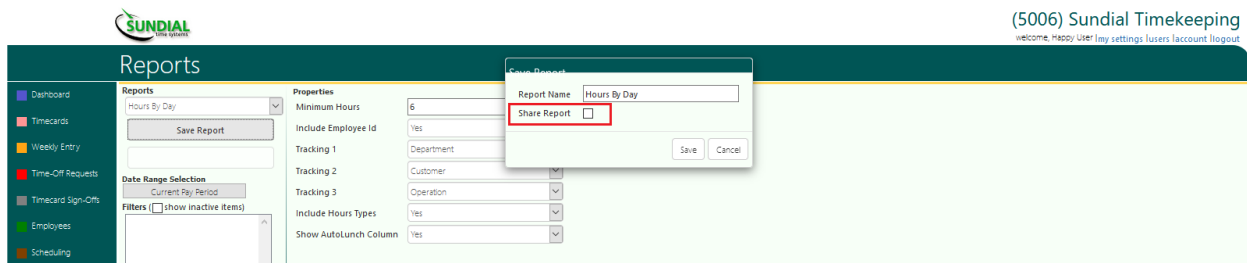
- Minimum Hours: 6
- Include Employee Id: Yes
- Tracking 1: Department
- Tracking 2: Customer
- Tracking 3: Operation
- Include Hours Types: Yes
- Show AutoLunch Column: Yes

When you click on the **“Save Report”** button the system will display a pop-up/overlay that will allow you to provide a **“Report name”** of your choice as shown below

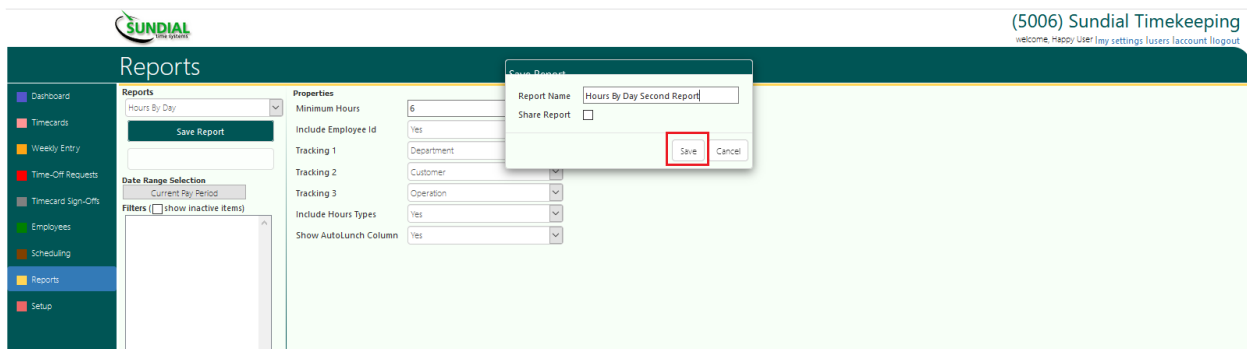


Furthermore it has a checkbox **“Share Report”** When you check this the system will create this report and share it with others as well. (In such cases, you will have access to manage the report as in edit/modify/delete, where as you co-workers will have access to this report and they will be allowed to consume this report)

By default, it will be **“unchecked”** making the created report to be available only for your consumption.



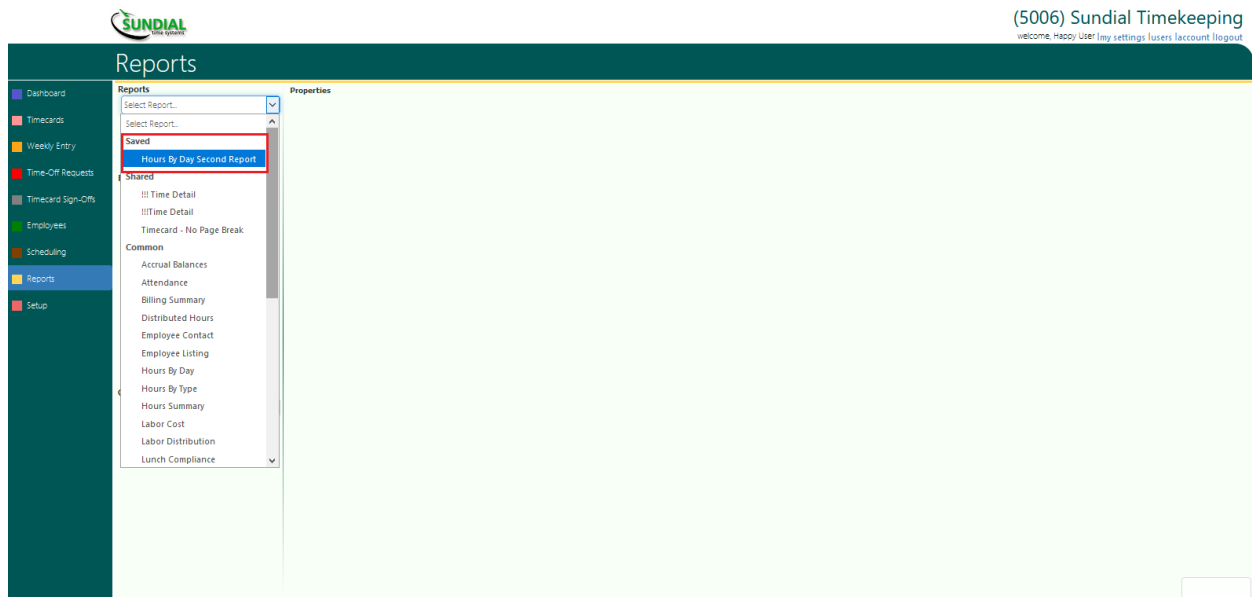
Once the required selections are done, click on the **“Save”** button on the pop-up/overlay to save the report as shown below



Once you save it, system will display this report under the “**Saved Reports**” in the reports dropdown as shown below

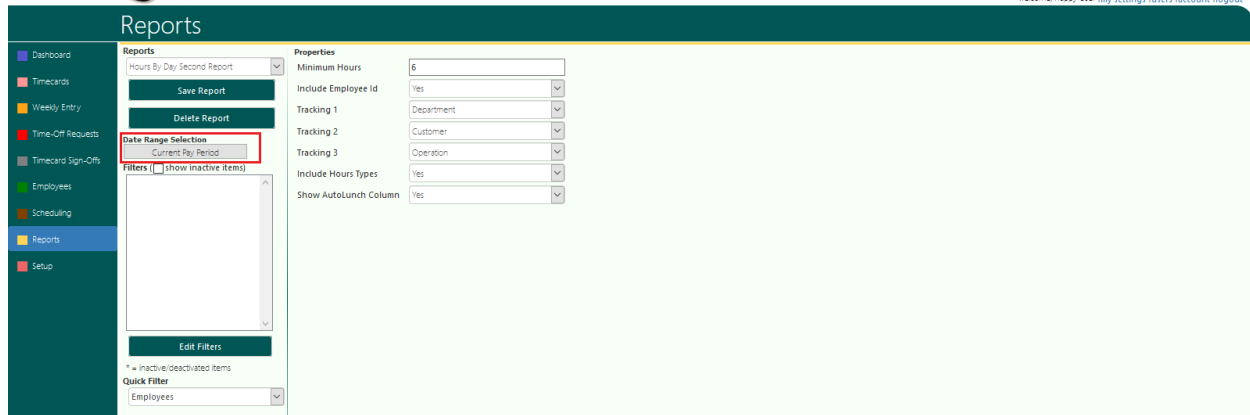
If you marked your report “Shared” prior to saving, then the created report will be grouped under the “**Shared Reports**” section for all other Users in your company. For you, it will always be in the Saved Reports section, whether or not you are sharing it.

Note : When a report is saved, **all the configuration associated with it will be saved as well.** (i.e. - any **Properties** and **Filter Criteria**) but any Date Range selections used **will not be saved** as part of the report and must be reviewed each time you generate a report.

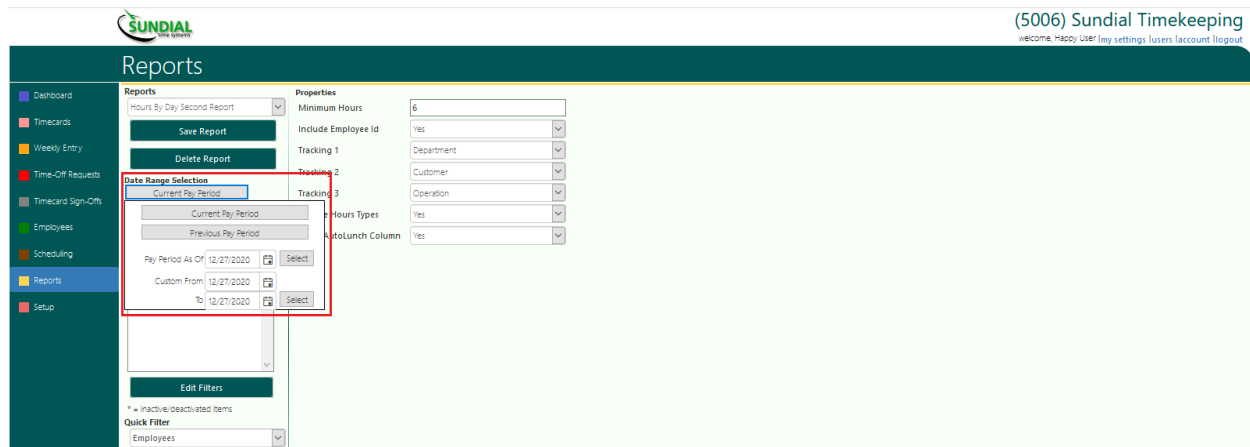


Date Range Selection on Reports

Like any other place in the system, even on the reports section you can select a **date range** using the **day range selection option**. In order to do this, you need to click on the button displayed under the “**Date Range Selection**” section as shown below.



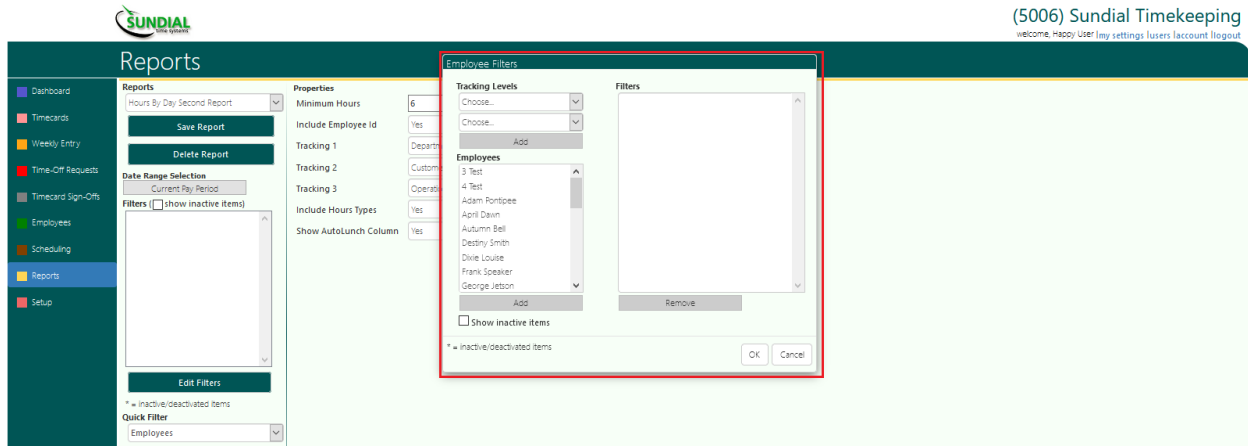
Once this is clicked system will load the usual date range selector pop-up/overlay, using which you can select the pay periods or provide a custom date range selection as shown below



Edit Filters

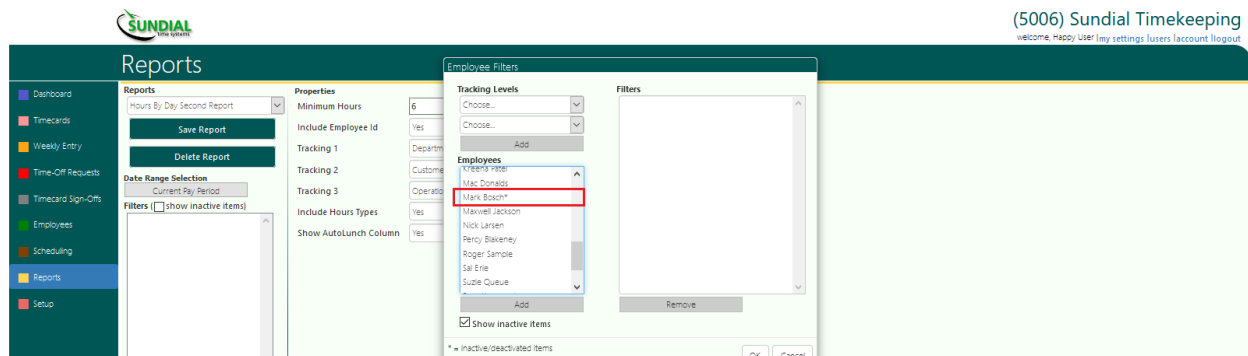
Using the edit filters button, you will be able to edit filters related to the **Tracking Levels** and **Employees** as shown below.

When you click on **“Edit Filters”** button, system will load a pop-up/overlay as shown below



In this pop-up/overlay, there is a “checkbox” to “**Show Inactive Items**” This will be unchecked by default. But if you check this in the system will display both active and inactive items. (i.e. from an employee standpoint, you will be able to view both “**Active**” & “**Inactive**” employees

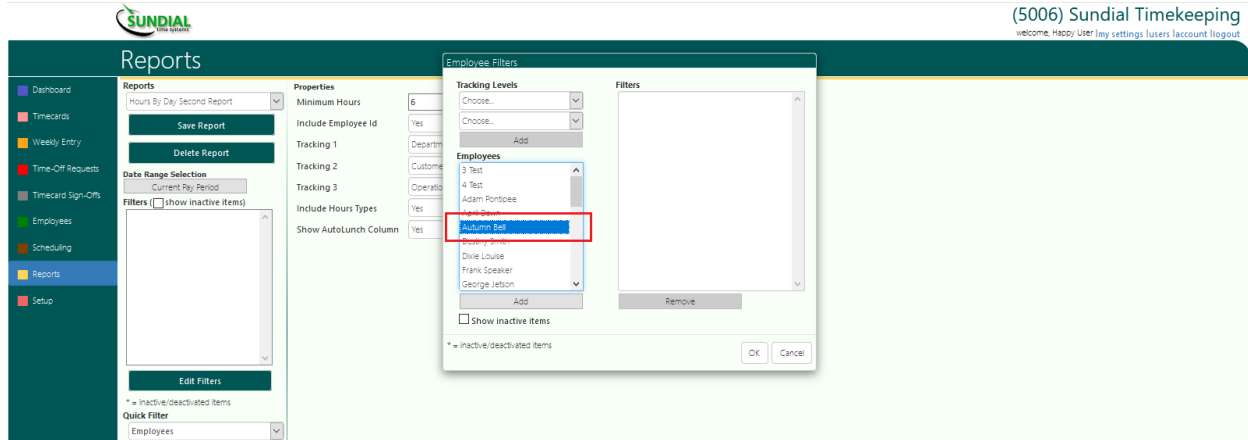
Note : Whenever an **inactive/deactivated** item is displayed system will display it with an * (asterisk) mark as shown below



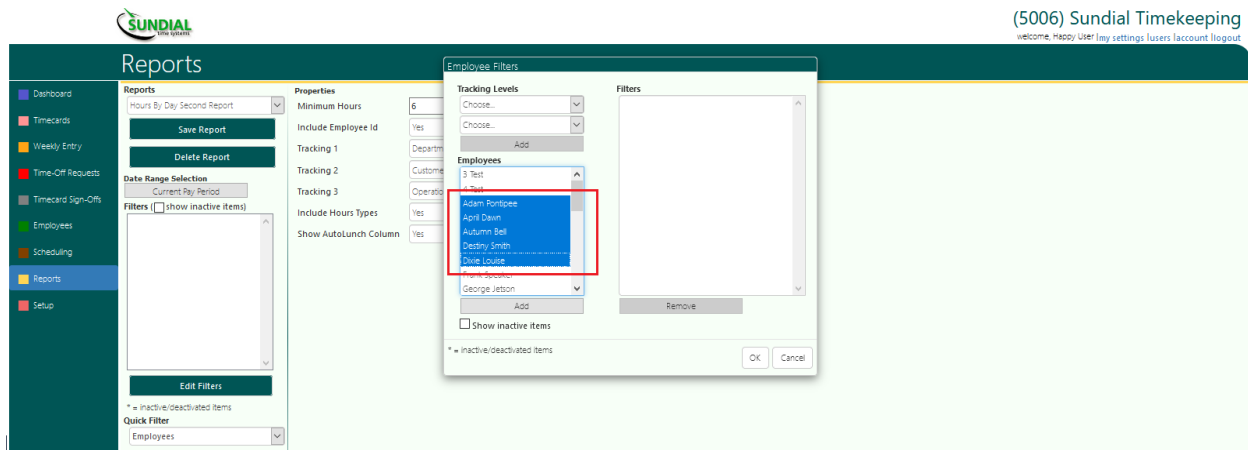
Multiple Employee Selection on Edit Filters

When it comes to “Employees” selection the system will allow you to choose both individual select and multi select options.

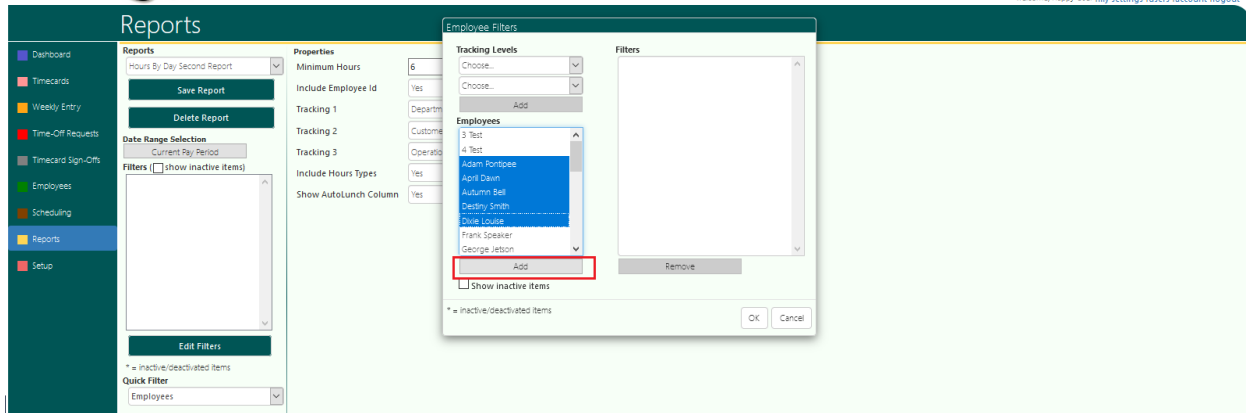
If you wish to do an individual select, you can simply click on any employee as shown below



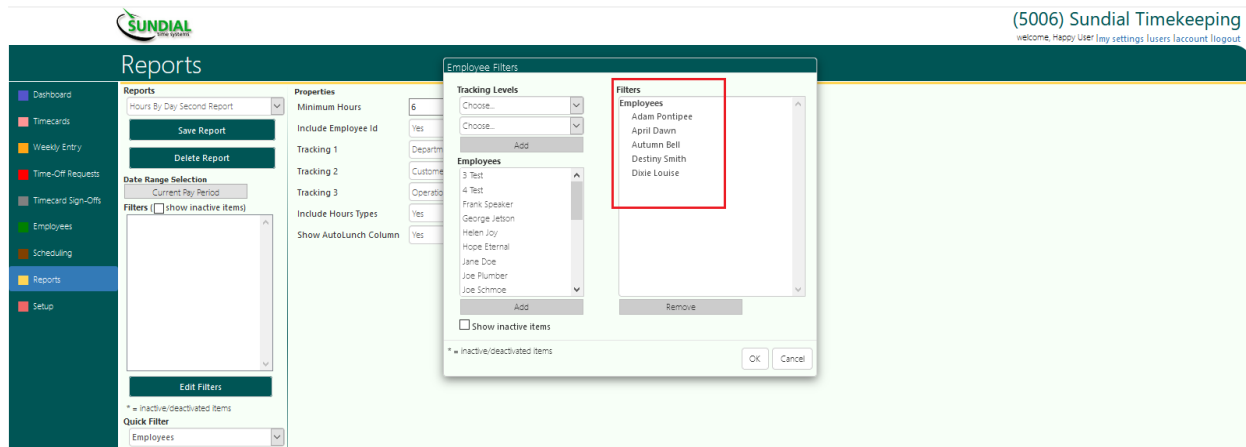
However, if you wish to go with a multi select employee option, you can simply **control click** (control + Click) or **shift click** (Shift + Click) or **Control Select** (control + Drag mouse to select) or **Shift Select** (Shift + Drag mouse to select). All these options will allow to select more than one employee and once selected those records will be highlighted in blue for ease of identification as shown below



Once the selection is done, you need to click on the **“Add”** button as shown below

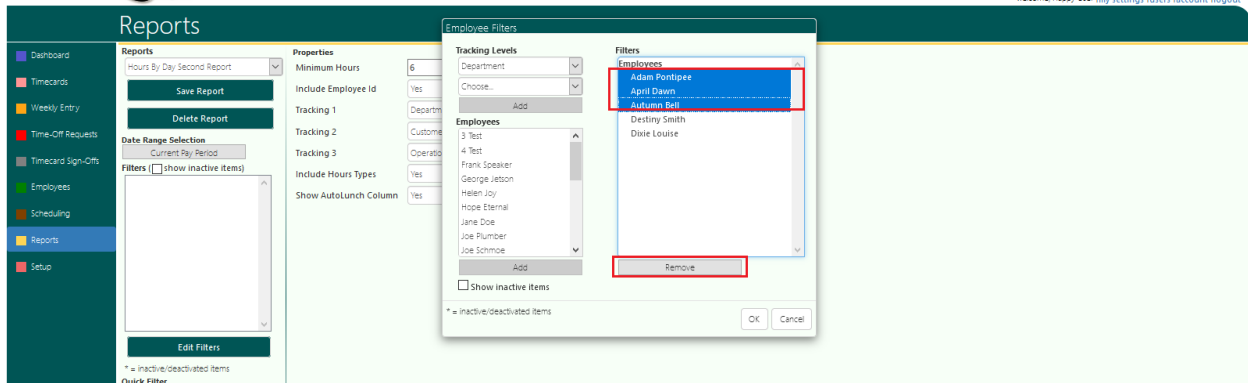


Once you click on “Add” system will display the added employees under the **filters text area** as shown below

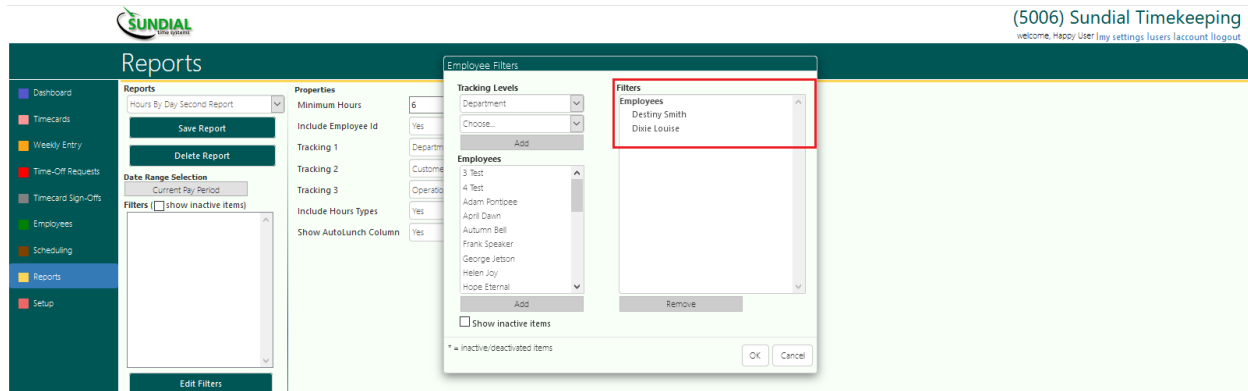


Removing added employees from the filters area

In order **remove** any added employee, you can choose the **employee to be removed** and then click on the “Remove” button as shown below



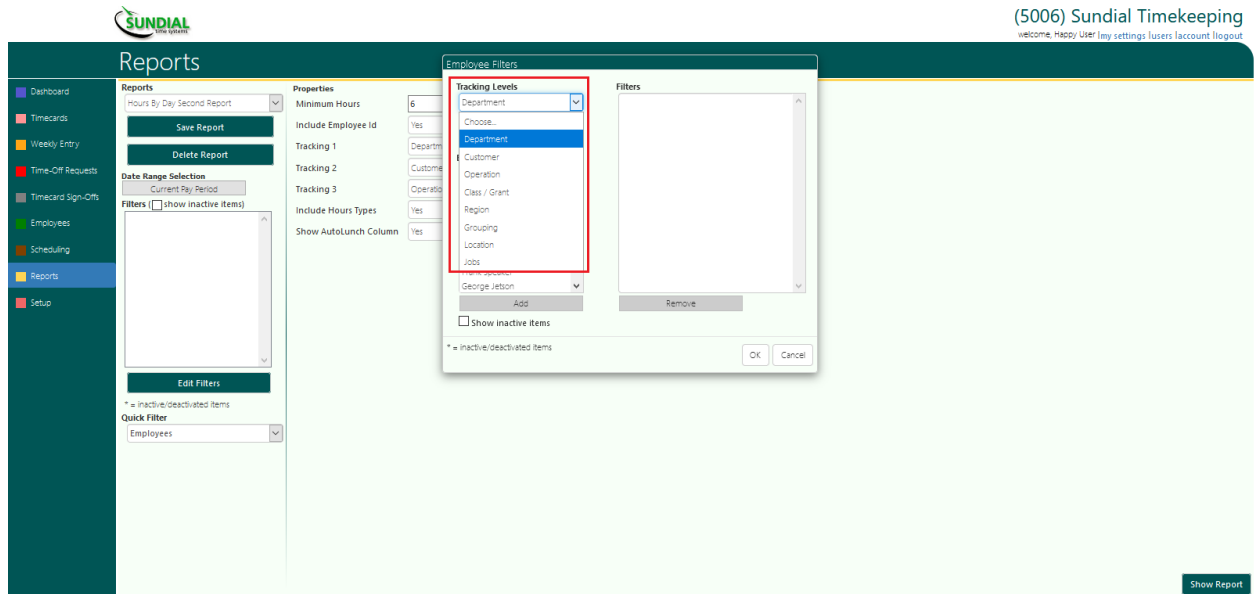
Once you click on the **“Remove”** button, system will **remove the selected employees** from the filter as shown below



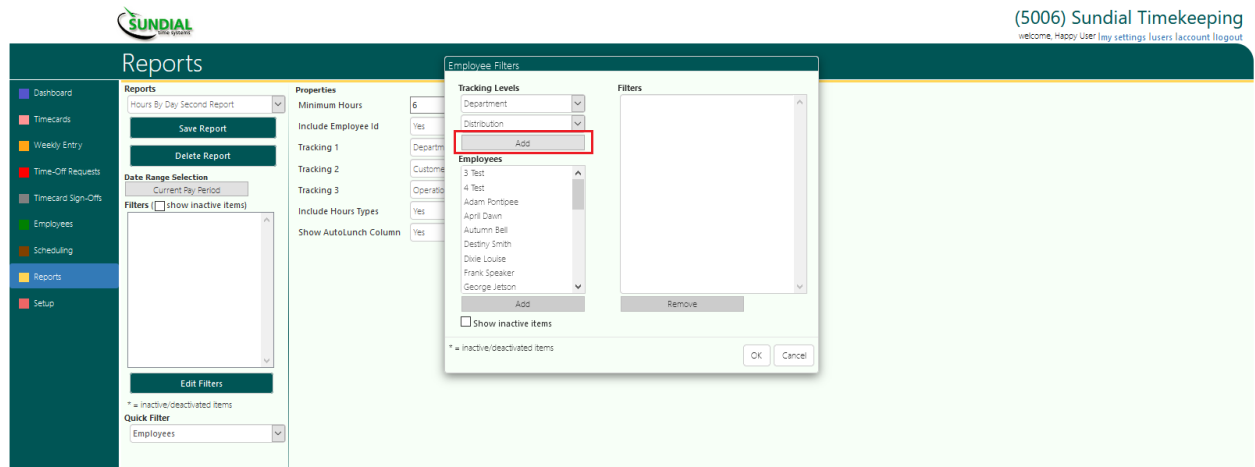
Adding Tracking Level Items to the Filter

If you include one or more Tracking Level Items in your filter, the filter will automatically include every employee that is assigned to the Item(s) included.

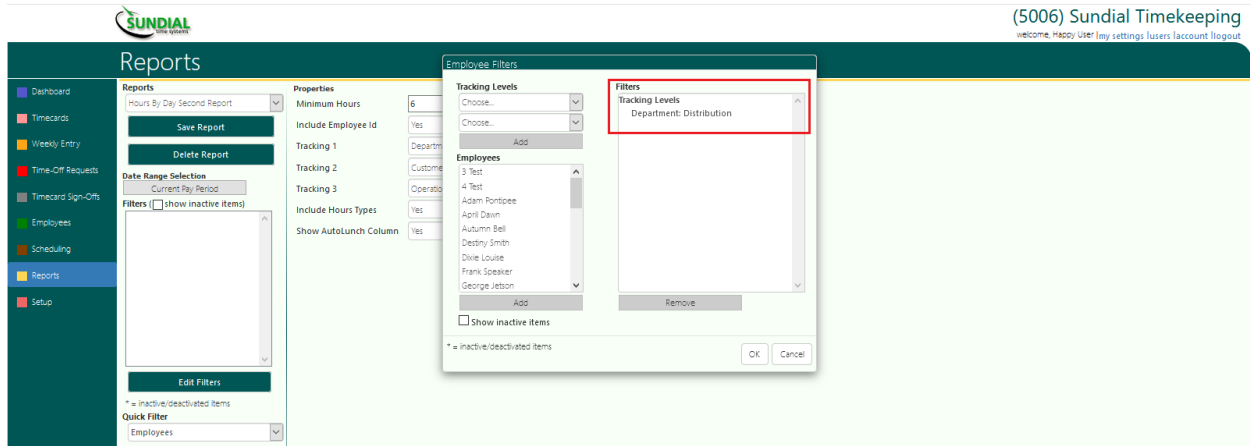
In order to add **“Tracking Levels”** you can choose the required tracking levels from the **“Tracking Level”** dropdown as shown below.



Once the tracking level items are chosen, you can click on the **“Add”** button as shown below.

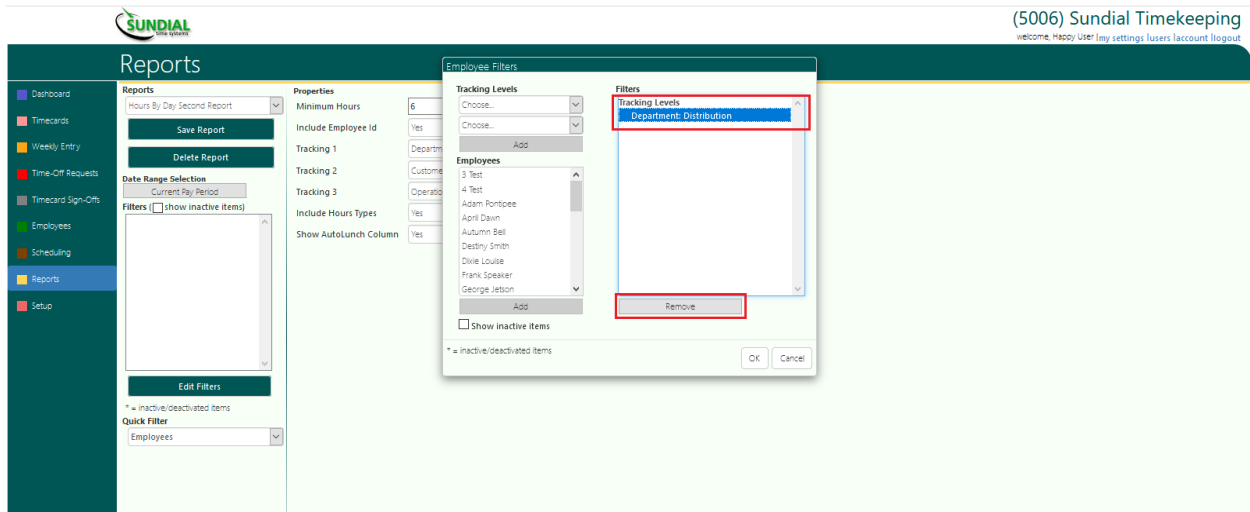


Once you click on **“Add”** the system will add these tracking levels to the filters and will be visible under the **filters text area** as shown below.

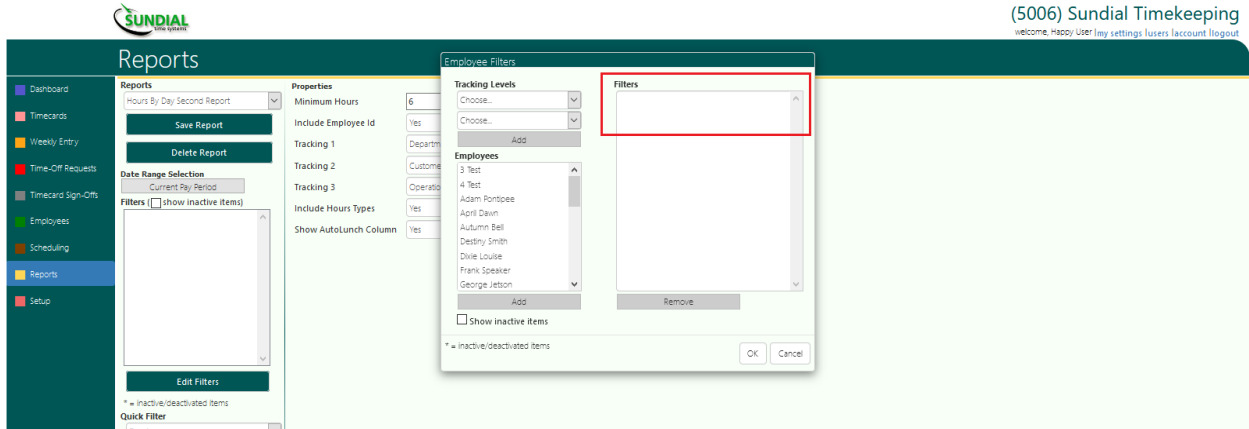


Removing added Tracking Levels from the filters area

In order **remove** any added Tracking Levels, you can choose the **Tracking Level to be removed** and then click on the **“Remove”** button as shown below



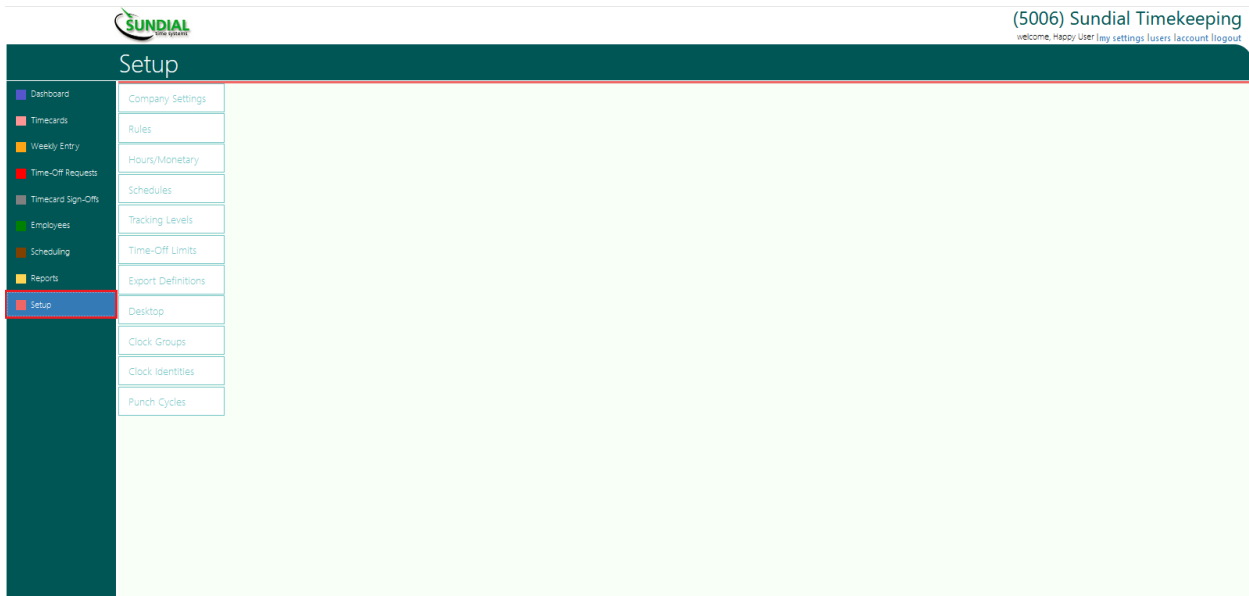
Once you click on the **“Remove”** button, system will **remove the selected Tracking Level** from the filter as shown below



5.11. Setup area

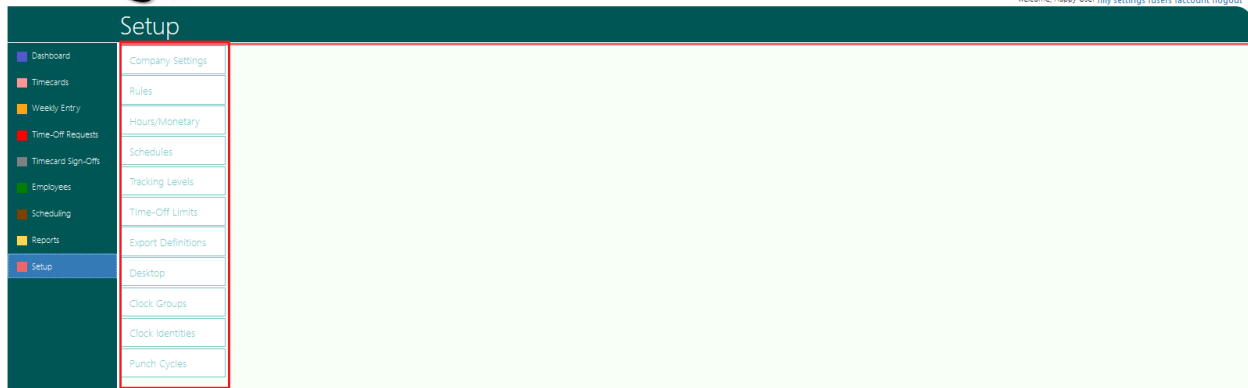
5.11.1. Going into Setup area

When you click on **“Setup”** on the Primary Navigation (Section A), you will be navigated to the **“Setup”** section as shown below



5.11.2. Understanding the Setup Area

Setting is a system area which involves most of the application configurations. Settings contain 11 main areas that are used for system configuration needs as shown below



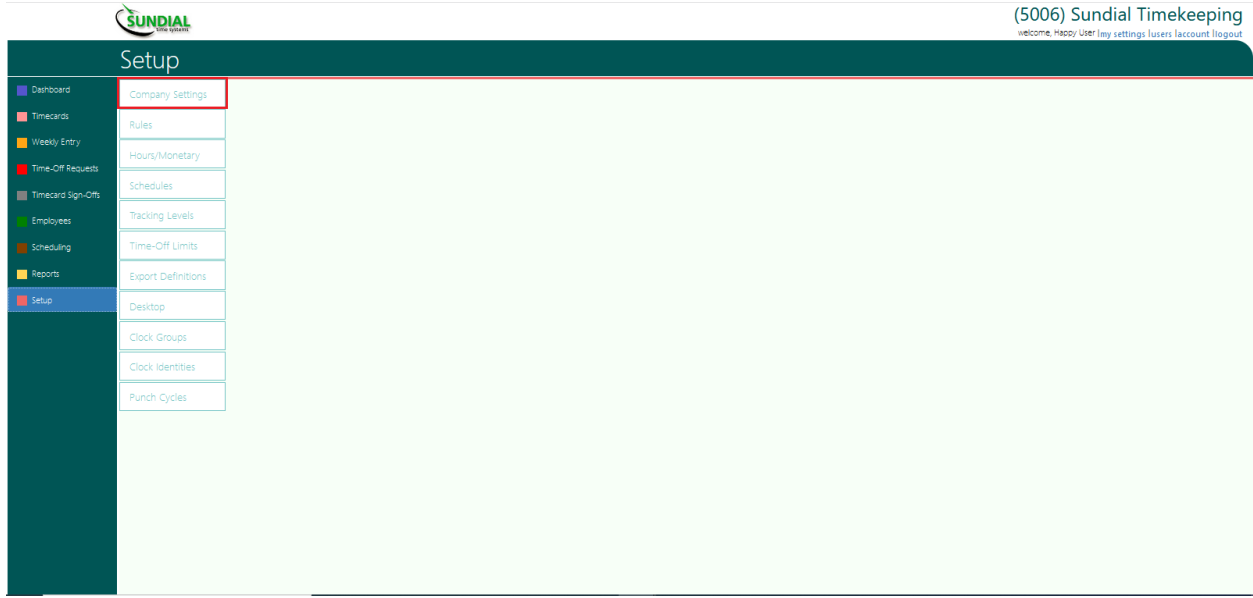
Listed below are those

1. **Company Settings**
2. **Rules**
3. **Hours/Monetary**
4. **Schedules**
5. **Tracing Levels**
6. **Time-off Limits**
7. **Export Definitions**
8. **Desktop**
9. **Clock Groups**
10. **Clock Identities**
11. **Punch Cycles**

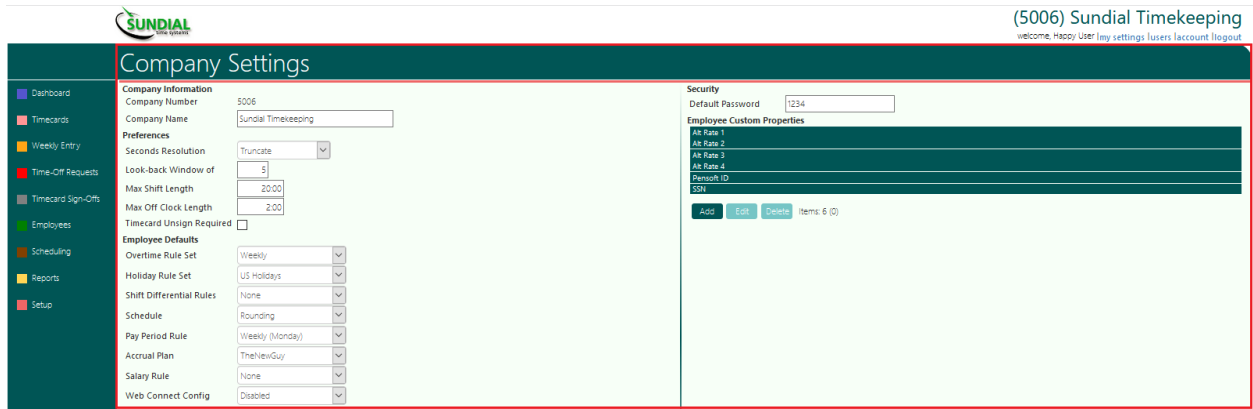
5.11.3. **Company Settings**

Going into “Company Settings”

In order to get in to the **“Company Settings”** you need to click on **“Company Settings”** under the **“Setup”** section as shown below



Once you click on “**Company Settings**” section, you will be navigated in to the “**Company Settings**” page as shown below



Understanding the “Company Settings”

Company Settings area has settings pertinent to the below mentioned areas

Company Information

Company Number : This field contains the “Company Number” of your account. This cannot be changed.

Company Name : This field contains the “company name” assigned for your company. You can modify this as you desire.

Preferences

[Dropdown]Seconds Resolution : Seconds are generally captured as part of the punches. However, the captured seconds can be either “Truncated”, “Rounded - to the nearest minute mark” or “Kept” as it is and shown on the timecards or timesheets. Using this dropdown you will be able to select what you wish to do on the seconds when it comes to the timecards and timesheets. Based on your selection system will either truncate it, round it or simply keep it as it is.

Look-back Window of : Look back window means the default number of days into the current pay period that the system is going to default the previous pay period. This will be applicable for areas such as timecards and reports. Using this field you will be able to define the number of days for the Look-back period.

Example:

If your pay period is weekly, your period starts every Sunday and your Look Back is set to “3”, then Sunday, Monday and Tuesday the Date Range Selector will default to “Previous Pay Period”. Then Wednesday through Saturday it will default to “Current Pay Period”

Max Shift Length : Using this field you can define the maximum number of hours available for an employee to be clocked in. (i.e. - if the Max shift length is set for 12 hours, in the event if a single shift lasts more than 12 hours, the system will trigger an exception here)

Max Off Clock Length : This is the duration between a clock out and re clock-in within a given shift. (i.e. - if the Max Off Clock length is set for 2 hours, and the employee is off the clocks for more than 2 hours, the system will assume the employee’s next clock in is starting a new shift)

[Checkbox]Timecard Unsign Required : If this checkbox is checked, then a signed timecard needs to be unsigned before any edits can be done on it.

Employee Defaults

These fields contain the defaults settings related to any employee in the system. Once these rules are set, system will apply these to any new employee that gets created in the system

Note : All these values are configurable at a company level and the values displayed under each of these dropdowns may vary based on your company configurations

[Dropdown] Overtime Rule Set : Using this dropdown, you will be able to set up the default “Overtime rule set”

[Dropdown] Holiday Rule Set : Using this dropdown, you will be able to set up the default “Holiday rule set”.

[Dropdown] Shift Differential Rules : Using this dropdown, you will be able to set up the default “Shift Differential Rules”

[Dropdown] Schedule : Using this dropdown, you will be able to set up the default “Schedule”

[Dropdown] Pay Period Rule : Using this dropdown, you will be able to set up the default “Pay Period Rule”

[Dropdown] Accrual Plan : Using this dropdown, you will be able to set up the default “Accrual Plan”

[Dropdown] Salary Rule : Using this dropdown, you will be able to set up the default “Salary Rule”

[Dropdown] Web Connect Config : Using this dropdown, you will be able to set up the default “Web Connect Config”

Security

Default Password : This default password will be automatically applied to the password fields of newly created Users and Employees Furthermore when the default password is applied to the new record, it also sets the flag requiring that the password be changed on next login.

When a Default Password exists, users can simply check the box “Password change required” for Employee and User records and the system will automatically set the Default Password in conjunction with setting the change required flag.

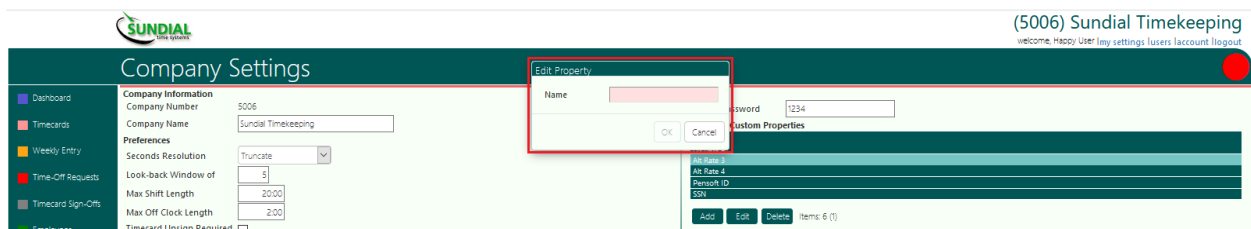
Employee Custom Properties

This area contains your custom employee properties

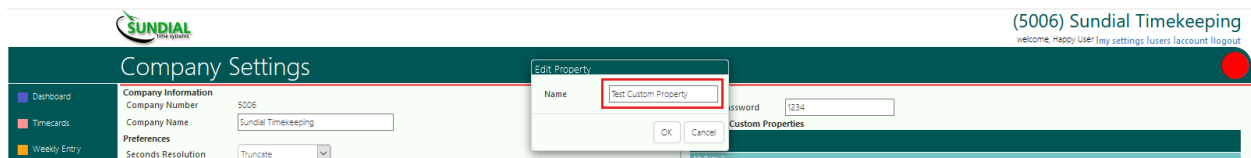
Adding a Custom Property

[button] Add : Using this button you will be able to add new custom properties.

When you click on “Add” system will display a Pop-up/overlay as shown below



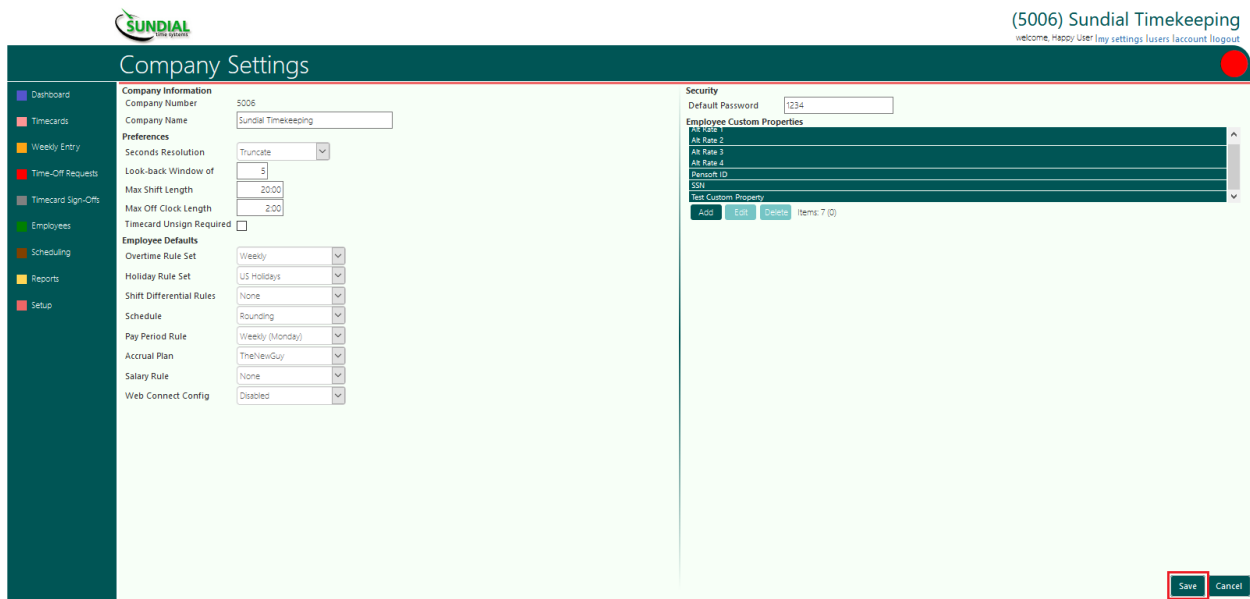
Once this pop-up/overlay is loaded, you will be able to enter the name of the “**Employee Custom Property**” as shown below



When you click “**OK**” on the pop-up/overlay, system will save the added the “**Employee Property**” as shown below **Custom**



Once this is done, you will need to click on the “**Save**” button on the main page as shown below



When you click on “**Save**” system will save the created record in the system

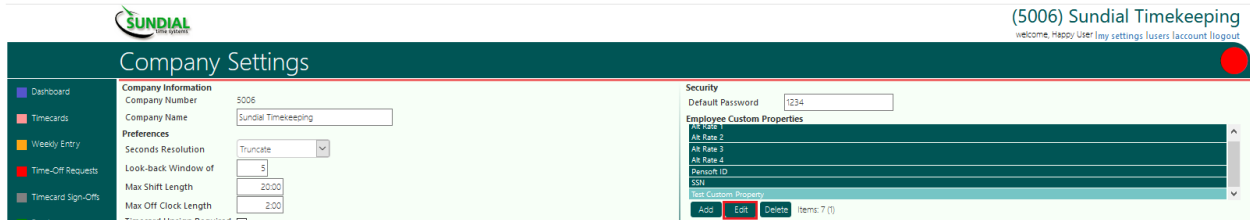
Editing a Custom Property

[button] Edit : Using this button you will be able to edit existing custom properties

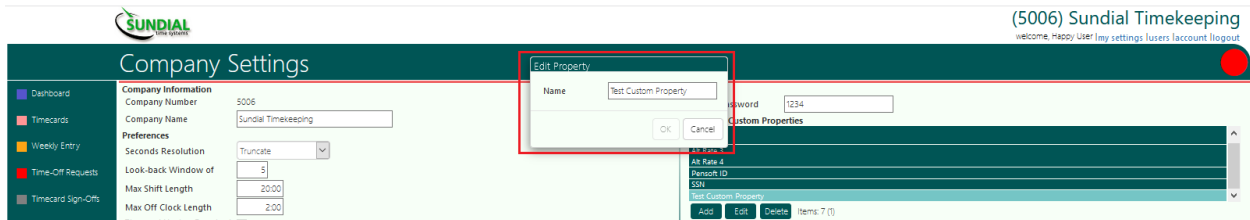
In order to **edit** a record, you need to first **select** the record by clicking on it as shown below. When clicked the selected line items will be shaded with a lighter complexion to help you differentiate it from the rest



Once selected, you can click on the **“Edit”** button as shown below



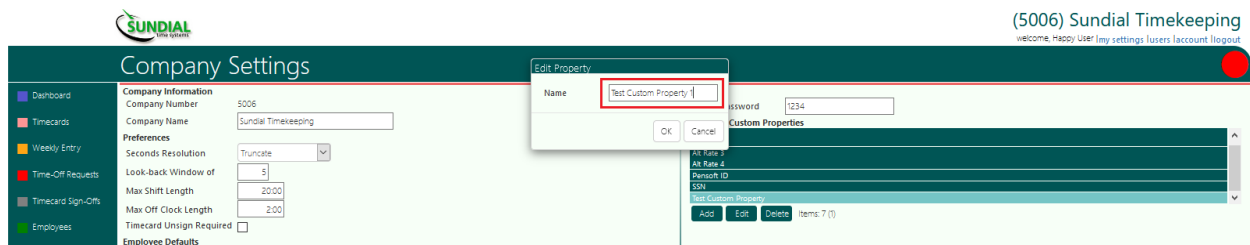
When you click on **“Edit”** the system will display a pop-up/overlay as shown below.



Once you **“Edit”**, you can click on the **“OK”** button to save it as shown below

Note : **“OK”** button will be in a disabled state until such time the value shown is changed.

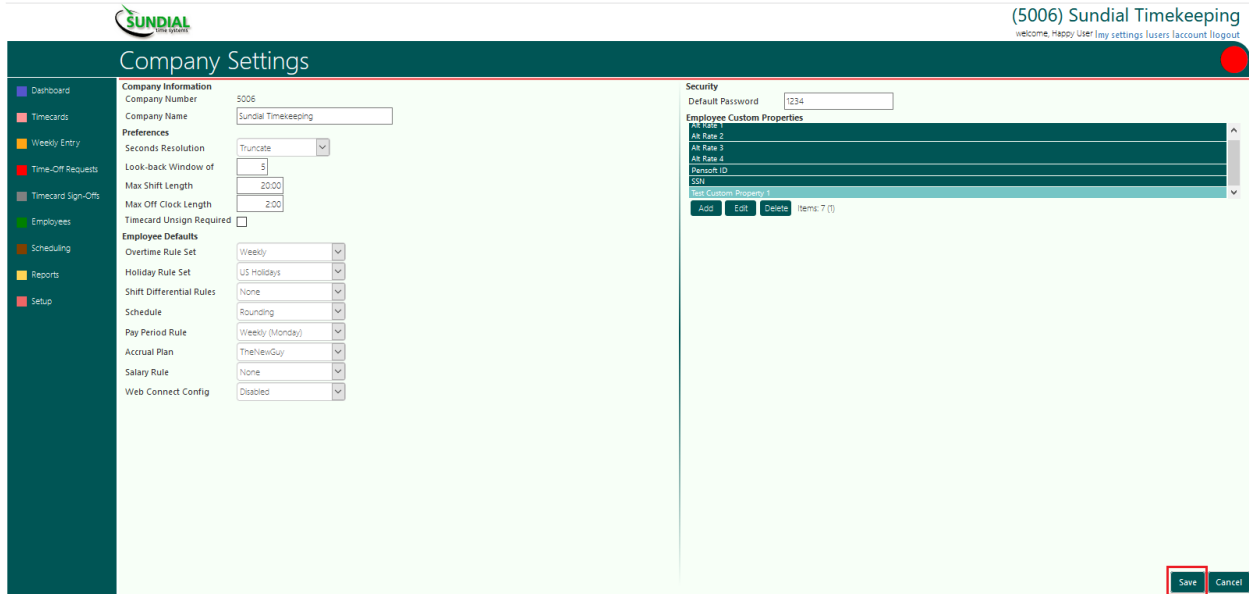
Only once you make a change the **“OK”** button will be enabled



Once you click on the **“OK”** button system will save the changes and it will be displayed as shown below



Once this is done, you will need to click on the **“Save”** button on the main page as shown below

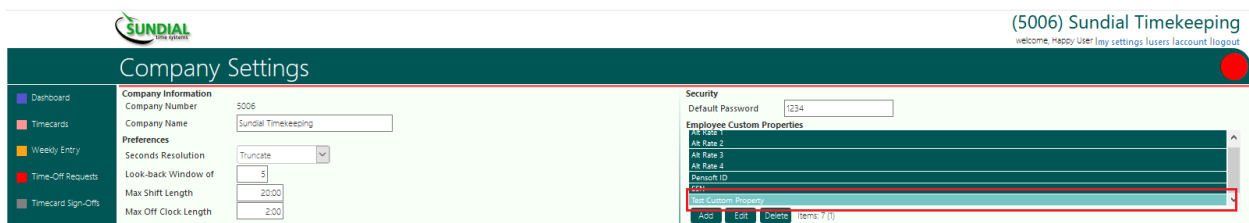


When you click on **“Save”** system will **save** the **Edited** record in the system

Deleting a Custom Property

[button] Delete : Using this button you will be able to delete existing custom properties

In order to **Delete** a record, you need to first **select** the record by clicking on it as shown below. When clicked the selected line items will be shaded with a lighter complexion to help you differentiate it from the rest



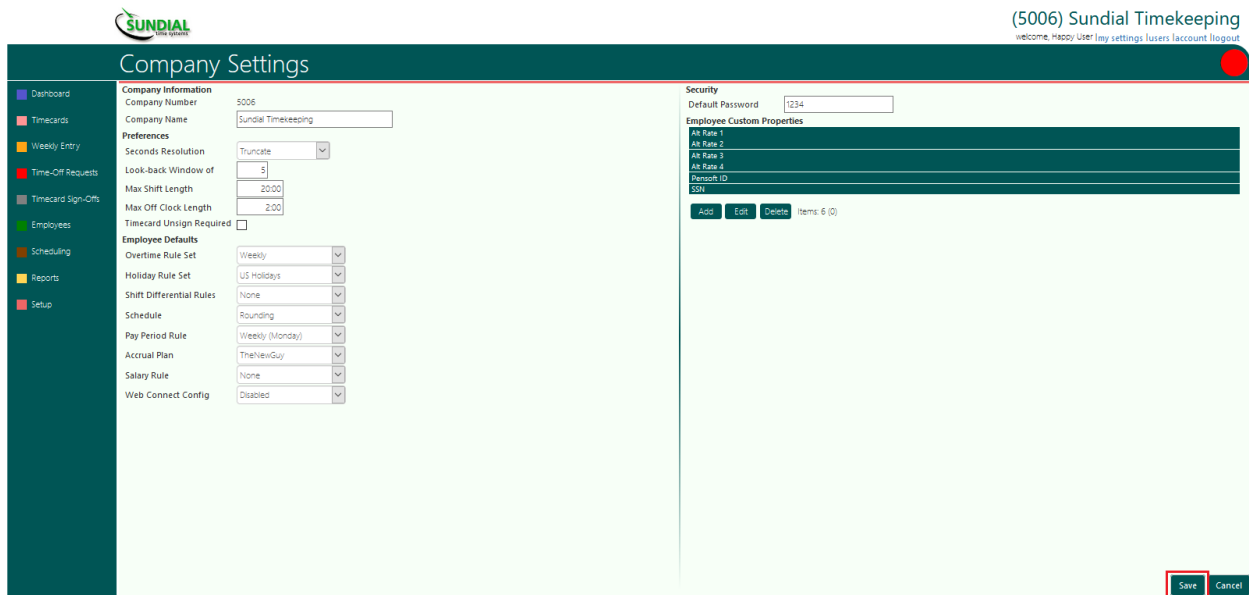
Once selected, you can click on the “Delete” button as shown below



When you click on the “Delete” button the system will delete the selected record as shown below



Once the record is “Deleted” you need to click on the “Save” button on the main page as shown below

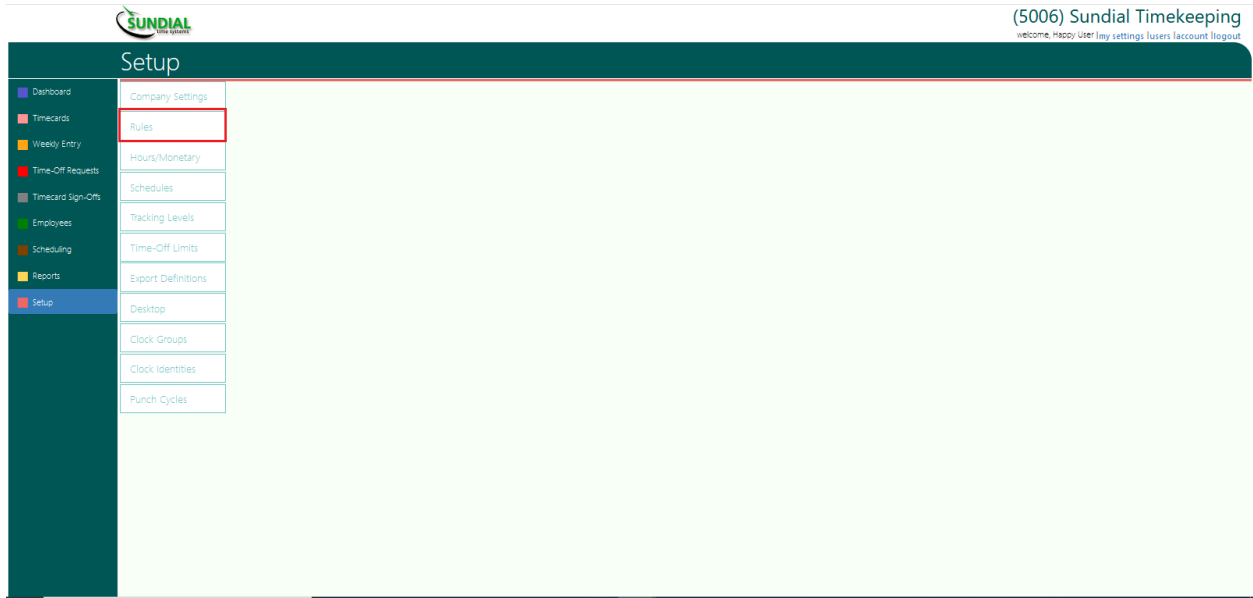


When you click on “Save” system will **remove** the the **Deleted** record from the system

NOTE: When you delete a Custom Property, the property is removed from every employee record, and any data that may have been stored in the custom property field will also be deleted.

5.11.4. Rules Going into “Rules”

In order to get in to the “Rules” you need to click on “Rules” under the “Setup” section as shown below



Once you click on “Rules” section, you will be navigated in to the “Rules” page as shown below



Understanding the “Rules”

Rules has settings pertinent to the below mentioned areas

1. Overtime Rules
2. Pay Period Rules
3. Holiday Rules
4. Differential Rules
5. Accrual Plans
6. Salary Rules

Going into Overtime Rules

In order to go in the “Overtime Rules” you need to click on the “Right Pointed” arrow head as shown below



Once you click on this arrow the system will expand “Overtime Rules” section as shown below

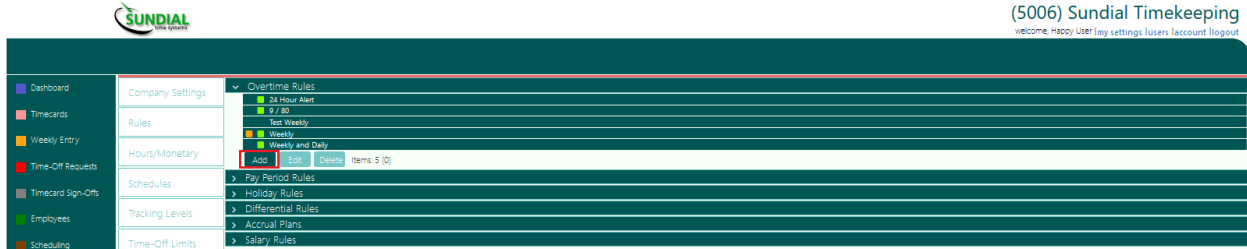


System will display any pre-configured rules under this section. In addition to this you will see 3 buttons as listed below

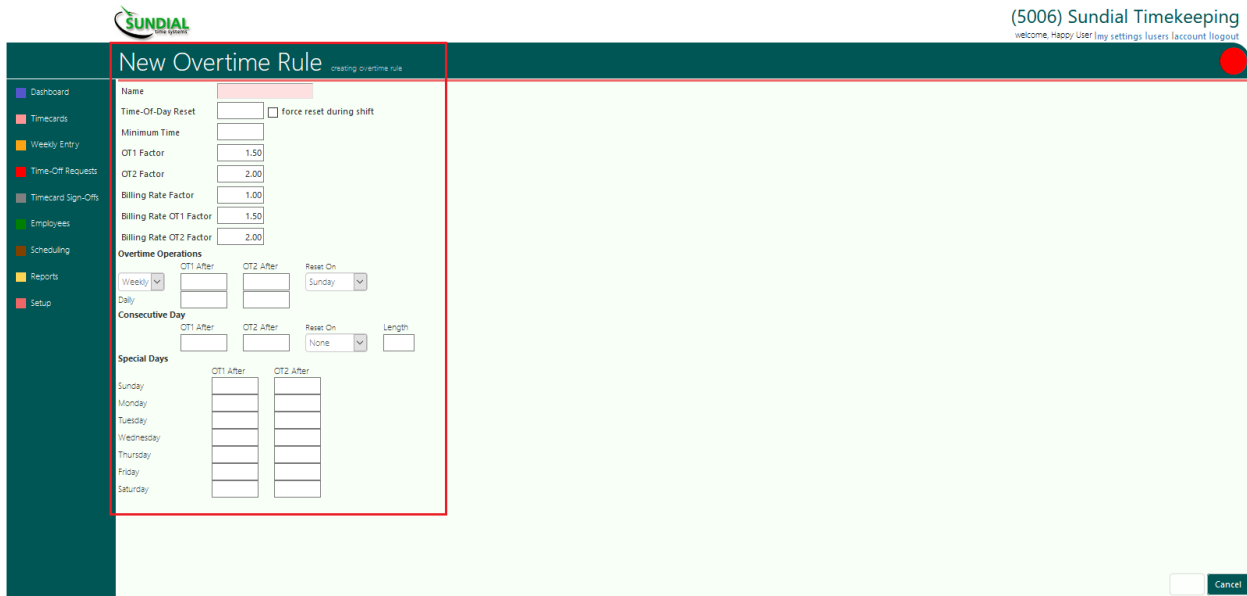
- **[Button] Add** : Using this button, you can “Add” any new overtime rule to the system
- **[Button] Edit** : Using this button, you can “Edit” any existing overtime rule
- **[Button] Delete** : Using this button, you can “Delete” any existing overtime rule

Adding “Overtime Rules”

In-order to add “Overtime Rules” you need to click on the “Add” button as shown below



Once you click on the “Add” button, system will display “New Overtime Rule” page as shown below



Understanding the “New Overtime Rule” Page

The “New Overtime Rule” page contains the below information that needs to be filled in order for a New Overtime Rule creation in the system

Name : Using this field, you will be able to set the name of the defined overtime rule

Time-Of-Day Reset : Using this field you can define a specific time of day that the rule resets

[Checkbox] force reset during shift: If you mark this checkbox, the system will reset the overtime rule even if the employee is on the clock at the time. If the box is not checked, the rule won't reset until the employee clocks out

Minimum Time : Using this field you can define the minimum number of hours the employees will be paid when they clock in.

(i.e. this requirement is state / business type based. Some states require a minimum number of hours to be paid in the event of a clock in irrespective of the number of hours the employee actually works. As an example, if this is set for four (4) hours, and an employee clocks in for only two (2) hours, the system will calculate the duration as four (4) hours)

OT1 Factor : Using this field, you will be able to define the rate for OT 1. This will usually be the employee's PayRate multiplied by **1.5** (this will be set by default with the option to change if required)

OT2 Factor : Using this field, you will be able to define the rate for OT 2. This will usually be the employee's PayRate multiplied by **2** (this will be set by default with the option to change if required)

Billing Rate Factor : This is a Fallback entry and is only used if the Employee record does not have a Bill Rate specified. The value here will be multiplied by the Employee's "**Pay Rate**" to produce the Bill Rate.

Billing Rate OT1 Factor : This is a Fallback entry and is only used if the Employee record does not have an Overtime Bill Rate specified. The value here will be multiplied by the Employee's "**Bill Rate**" to produce the Overtime Bill Rate.

Billing Rate OT2 Factor : This is a Fallback entry and is only used if the Employee record does not have a Double-Time Bill Rate specified. The value here will be multiplied by the Employee's "**Bill Rate**" to produce the Double-Time Bill Rate.

Overtime Operations

Period Overtime - This section sets up the periodic overtime rules. Leave fields blank if they are not needed for your configuration.

[Dropdown] Period : Using this dropdown, you can choose the Cycle Length for the overtime operations. You have the "**Weekly**", "**BiWeekly**", "**Custom**" options to choose from.

When you choose "**Weekly**", the system will display a dropdown allowing you to select the day of the week that the overtime period starts.

When you choose "**BiWeekly**", the system will display a calendar option to specify the reference date as shown below. The Reference Date is any date past, present or future that would be the first day of an overtime calculation cycle

New Overtime Rule

creating overtime rule

Name [text box]

Time-Of-Day Reset [checkbox] force reset during shift

Minimum Time [text box]

OT1 Factor [text box] 1.50

OT2 Factor [text box] 2.00

Billing Rate Factor [text box] 1.00

Billing Rate OT1 Factor [text box] 1.50

Billing Rate OT2 Factor [text box] 2.00

Overtime Operations

OT1 After [text box] **OT2 After** [text box] **Reference Date** [calendar icon] 12/29/2020

Consecutive Day

OT1 After [text box] **OT2 After** [text box] **Reset On** [dropdown] None **Length** [text box]

Special Days

	OT1 After	OT2 After
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

Cancel

When you choose “**Custom**”, the system will display a calendar option to choose the reference date and also another text box to enter the number of days as shown below. The Reference Date is any date past, present or future that would be the first day of an overtime calculation cycle. The number days specifies the length of your overtime cycle

New Overtime Rule

creating overtime rule

Name [text box]

Time-Of-Day Reset [checkbox] force reset during shift

Minimum Time [text box]

OT1 Factor [text box] 1.50

OT2 Factor [text box] 2.00

Billing Rate Factor [text box] 1.00

Billing Rate OT1 Factor [text box] 1.50

Billing Rate OT2 Factor [text box] 2.00

Overtime Operations

OT1 After [text box] **OT2 After** [text box] **Reference Date** [calendar icon] 12/29/2020 **Days** [text box] *Or manual positive number

Consecutive Day

OT1 After [text box] **OT2 After** [text box] **Reset On** [dropdown] None **Length** [text box]

Special Days

	OT1 After	OT2 After
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

OT1 After : Using this field you can define the maximum number of hours that an employee can work before OT1 begins. Any hours worked in excess of this value, during a single overtime cycle, will be elevated to OT1. (i.e. if you have defined the “**Overtime Operation**” as “**Weekly**” from the dropdown and you define this field as **40**, only after **exceeding 40 hours a week** the system will calculate the **OT1** for the employees.)

OT2 After : Using this field you can define the maximum number of hours that an employee can work before OT2 begins. (i.e. if you have defined the “**Overtime Operation**” as “**Weekly**” from the dropdown and you define this field as **50**, only after **exceeding 50 hours in a week** the system will calculate the **OT2** for the employees.)

Daily Overtime - This section sets up any needed Daily Overtime rules. Leave fields blank if they are not needed in your configuration.

OT1 After : Using this field, you can set up the OT1 rules at a day level. (i.e. if you define this as 8, only after exceeding 8 hours a day, the system will calculate OT1)

OT2 After : Using this field, you can set up the OT2 rules at a day level (i.e. if you define this as 10, only after exceeding 10 hours a day, the system will calculate OT2)

Consecutive Day - This section lets to define an overtime rule that only occurs if the employee has worked several days consecutively. (i.e. Some states and/or labor agreements require this)

OT1 After : Using this field you can define when the OT1 gets applied (in the event of consecutive days of work) (i.e. if you define the length as 7 and key in 0 for this field, it means, the moment the employee starts working on the 7th consecutive day, the system will apply OT1)

OT2 After : Using this field you can define when the OT2 gets applied (i.e. if the length is 7 and OT2 is defined as 8 hours, it means after 8 hours of work on the 7th consecutive day, the system will start to apply OT2)

[Dropdown] Reset on : Using this dropdown, you can define when to reset the calculations on the “consecutive day” Overtime calculations. If you choose “None” from the dropdown, the system will do the calculation for the rolling number of days defined on the “Length” field. (i.e. if you define the value 7 on the length field and select “None” on the “Length” it means, the system will look for any 7 days an employee works consecutively and then apply the set overtime rules.)

Conversely, if you set the Reset on to Monday and the Length to 7, then the rule will only apply to work performed on Sunday, and only if the employee also worked every day, Monday through Saturday

Length : Using this field, you can define the number of days where the overtime needs to be applied if the employee works consecutively. (i.e. If you define this field as 7, when the employee works for 7 consecutive days, system will start to apply the overtime as configured on the 7th day)

Special Days - Using special days, you can define any rule to apply on overtime that is special for any day or the week. (.i.e. If your organization wishes to offer overtime for any employee who works on Sunday)

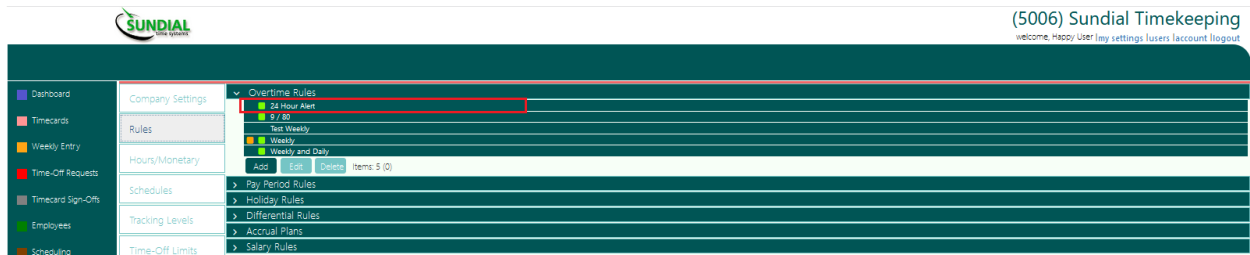
Days of the week (Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday)

OT1 After : Using this field, you can define the number of hours that is required for an employee to work in order for the OT1 rule to get applied. (i.e. - If your organization wishes to offer overtime for any employee who works on a Sunday (irrespective of the number of hours, then you can set this up to 0.00) it means, if an employee clocks on a Sunday, then will automatically get paid on OT1 rate from the beginning of their shift

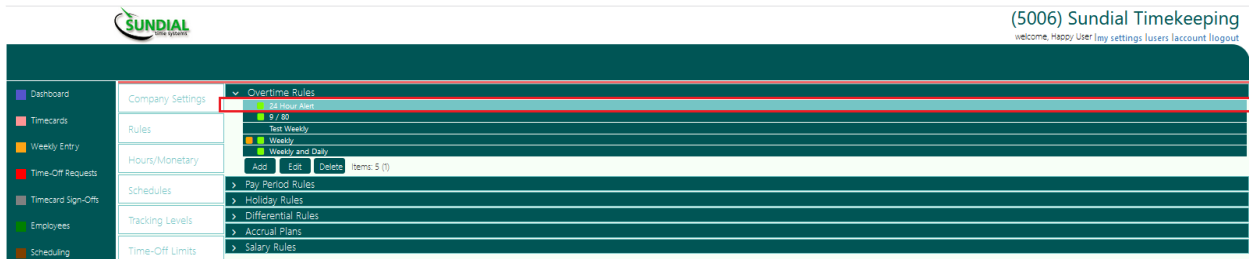
OT2 After : Using this field, you can define the number of hours that is required for an employee to work in order for the OT2 rule to get applied. (if you set this up for 4 hours, once the employee crosses the first 4 hours on OT1, system will automatically start to apply the OT2 rate for them)

Editing “Overtime Rules”

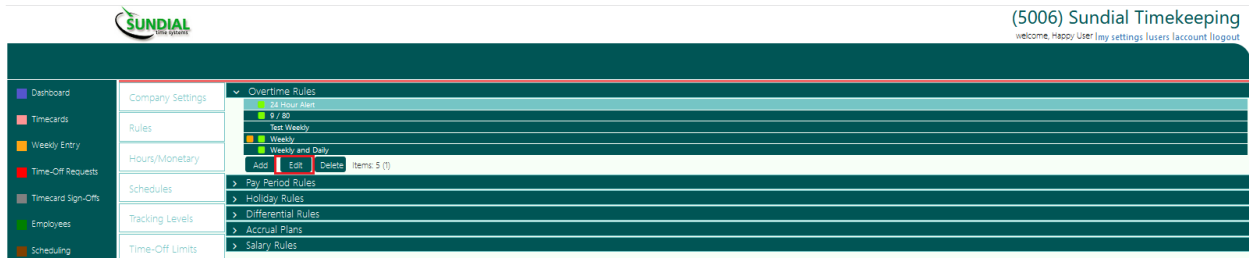
In order to “**Edit**” an overtime rule, you need to first select the “**Overtime**” rule by clicking on it as shown below



Once you click on an overtime rule, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

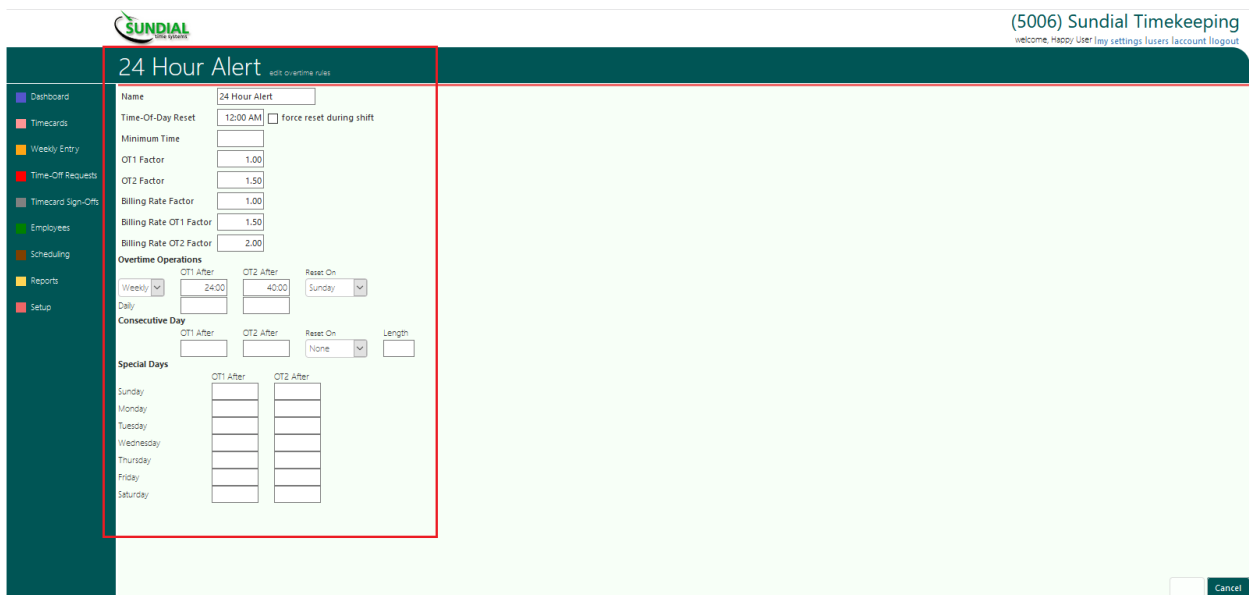


Now you need to click on the “Edit” button as shown below



Once the “Edit” button is clicked the system will load the overtime rule in an editable mode as shown below.

You will now be able to make any changes to existing rule values.



Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below

The screenshot shows the '24 Hour Alert' configuration page in the Sundial Timekeeping system. The page title is '(5006) Sundial Timekeeping' with a user welcome message 'welcome, Happy User! my settings users account logout'. The page is titled '24 Hour Alert' with a sub-link 'edit overtime rules'. The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area includes the following fields and sections:

- Name:** 24 Hour Alert
- Time-Of-Day Reset:** 12:00 AM, with a checkbox for 'force reset during shift'.
- Minimum Time:** (empty)
- OT1 Factor:** 1.00
- OT2 Factor:** 1.50
- Billing Rate Factor:** 1.00
- Billing Rate OT1 Factor:** 1.50
- Billing Rate OT2 Factor:** 2.00
- Overtime Operations:** Includes dropdowns for 'Weekly' and 'Daily', input fields for 'OT1 After' (24.00) and 'OT2 After' (40.00), and a 'Reset On' dropdown set to 'Sunday'.
- Consecutive Day:** Includes input fields for 'OT1 After' and 'OT2 After', a 'Reset On' dropdown set to 'None', and a 'Length' input field.
- Special Days:** A table with columns for 'OT1 After' and 'OT2 After' for each day of the week (Sunday through Saturday).

The 'Save' button at the bottom right is disabled, indicated by a red box around it.

Once you make any changes the system will enable the “Save” button as shown below.

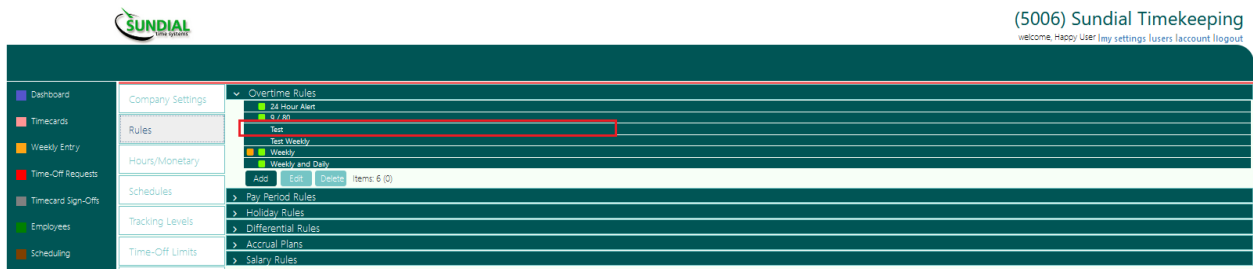
This screenshot is identical to the one above, showing the '24 Hour Alert' configuration page. However, the 'Save' button at the bottom right is now enabled, highlighted with a red box. The 'OT2 After' field in the 'Consecutive Day' section has been changed from 40.00 to 2.00, indicating that a change has been made to the configuration.

Once you click on the “Save” button the system will save any changes done

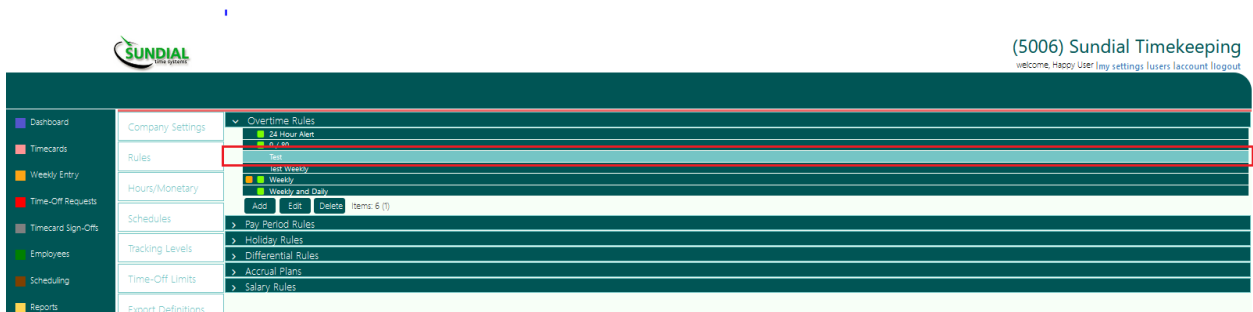
Deleting “Overtime Rules”

In order to “Delete” an overtime rule, you need to first select the “Overtime” rule by clicking on it as shown below

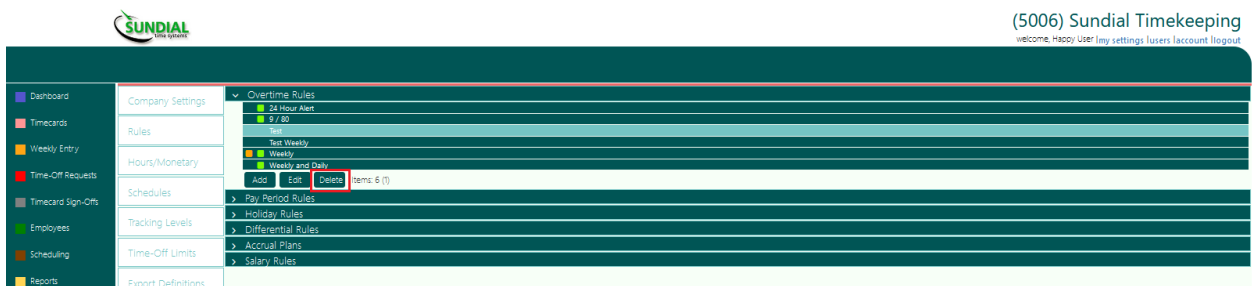
NOTE: You cannot delete a rule that is in use. The orange box preceding a rule indicates that it is specified as the “default” rule. A green box preceding a rule indicates that it is currently assigned in one or more places.



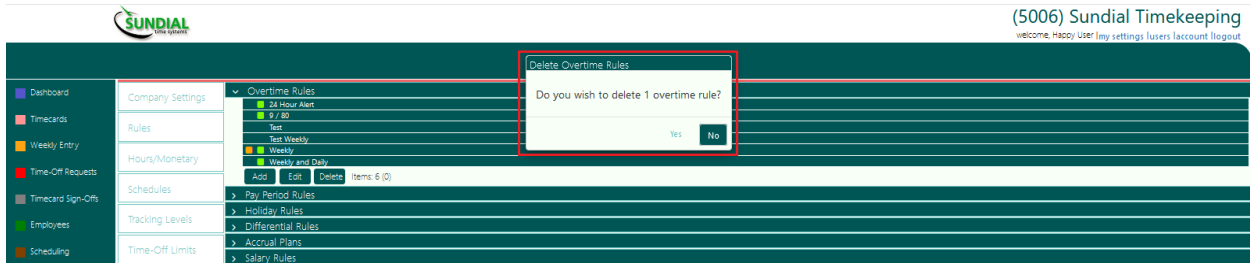
Once you click on an overtime rule, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



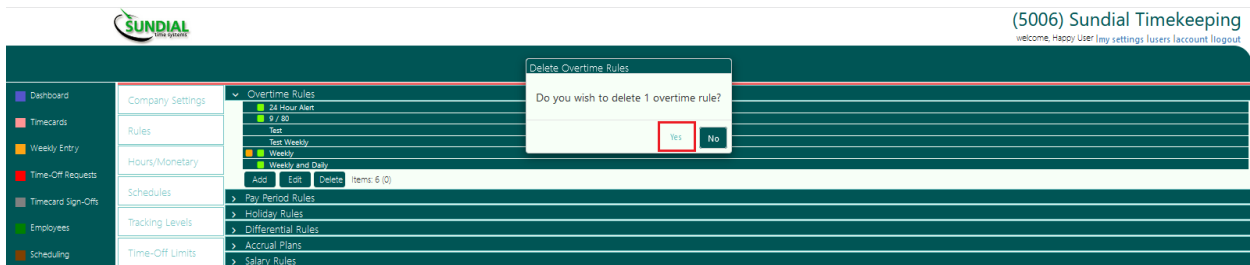
Once selected, you can click on the “Delete” icon as shown below



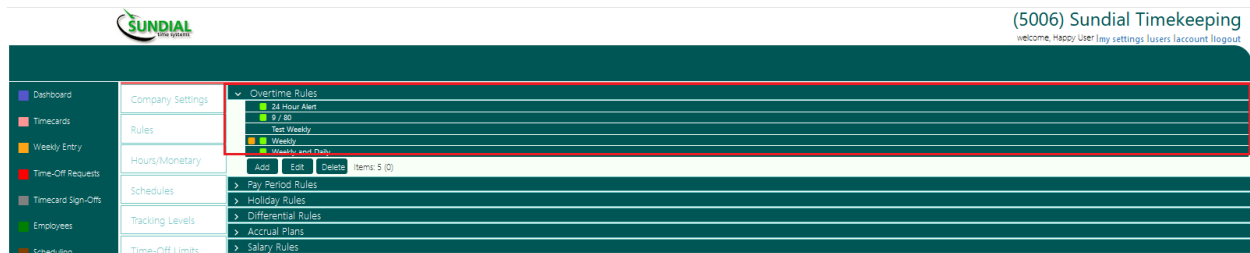
Once you click on **“Delete”** the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click **“Ok”** on this pop-up/overlay as shown below

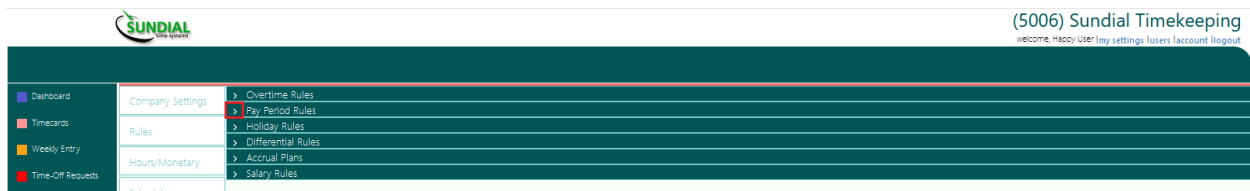


Once you click **“Ok”** the system will then delete the selected rule as shown below

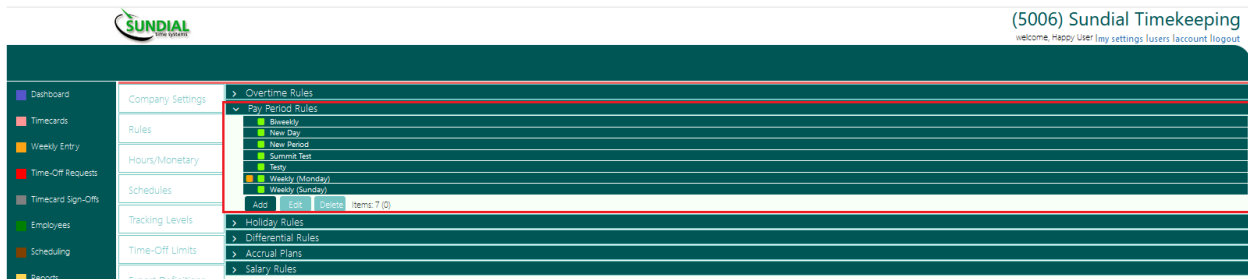


Going into Pay Period Rules

In order to go in the **“Pay Period Rules”** you need to click on the **“Right Pointed”** arrow head as shown below



Once you click on this arrow the system will expand “Pay Period Rules” section as shown below

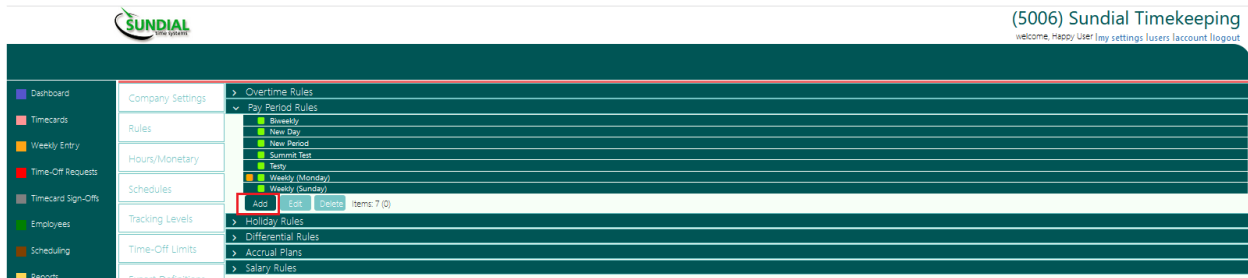


System will display any pre-configured rules under this section. In addition to this you will see 3 buttons as listed below

- **[Button] Add** : Using this button, you can “Add” any new Pay Period rule to the system
- **[Button] Edit** : Using this button, you can “Edit” any existing Pay Period rule
- **[Button] Delete** : Using this button, you can “Delete” any existing Pay Period rule

Adding “Pay Period Rules”

In-order to add “Pay Period Rules” you need to click on the “Add” button as shown below



Once you click on the “Add” button, system will display “Pay Period Rule” page as shown below

Understanding the “Pay Period Rule” Page

The “**Pay Period Rule**” page contains the below information that needs to be filled in order for a New Pay Period Rule creation in the system

Name : Using this field, you will be able to set the name of the defined Pay Period rule

Export Definition : Using this field you will be able to specify the Export Rule that this Pay Period will use. To create your Export Rules see Setup >> Export Definitions

Use the bullet indicator to specify the desired Pay Period Length. Supported lengths are Weekly, BiWeekly, Semi-Monthly and Monthly. Each will have their own parameters as described below

Weekly

Start of day period : Use this field to specify the weekday that your Pay Period begins.

BiWeekly

Reference Date : Use this field to specify a Date, Past, Present or Future, that your Biweekly Period Began

Semimonthly

First day in month : Use this field to specify the starting day of the first Pay Period in the month.

Second day in month : Use this field to specify the starting day of the second Pay Period in the month.

From [Dropdown] : Using this field you can define when the second day of the month should be. You have two options to choose from which are “Start Of Month” & “End Of Month”.

- If you specify “Start Of Month”, the second day will simply be the number provided to the “Second day in month” field. Value must be greater than “First day in Month” and Less than 29.
- If you specify “End Of Month”, the second day will calculate the backward from the last day in the month. Possible values are 1 through 8.

Monthly

First day in month : Use this field to specify the day of the month that your Pay Period begins.

Properties

Midnight Offset : If, for your company, a new day begins at a time other than midnight, you can specify a duration here to indicate when your new day begins. Use a Negative value if your new day starts before midnight and use a Positive value if it begins after midnight. (i.e. If any shift that begins after 10PM is considered to be part of the following calendar day, then specify -2:00)

Start Time : Use this to specify the Time of Day that your new Pay Period begins

New Day Split [Checkbox] : If this box is checked, the system will create a “New Shift” punch record for any Employees that are on the clock at the calendar day change.

New Pay Period Split [Checkbox] : If this box is checked, the system will create a “New Shift” punch record for any Employees that are on the clock at the pay period changes

Note : If the Day and Pay Period both begin at the same time, such as midnight, then there is no need to mark both New Day and New Pay Period Split. The New Day Split will effectively create a New Pay Period Split as well.

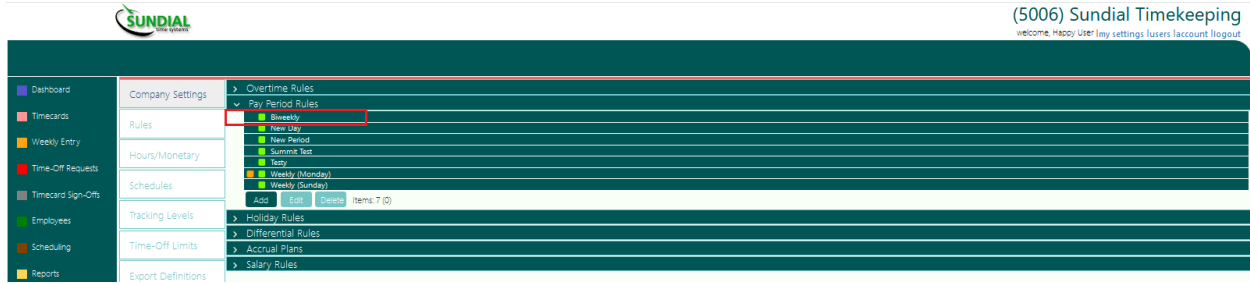
Apply Tracking Level [dropdown] : Use this to indicate which punch of a Workspan will control the Tracking Assignment for the duration. “Forward” means that the first punch in the pair determines the Tracking Level of the duration. “Backward” means that the second punch in the pair determines the Tracking Level of the duration.

Example: A “Forward” setting means that Employees will choose their tracking level at the time they clock in. Conversely a “Backward” setting means that the Employees will specify their tracking level at the time they clock out.

NOTE: The Tracking Level Direction also controls the Pay Rate direction when the two punches have different rates.

Editing “Pay Period Rules”

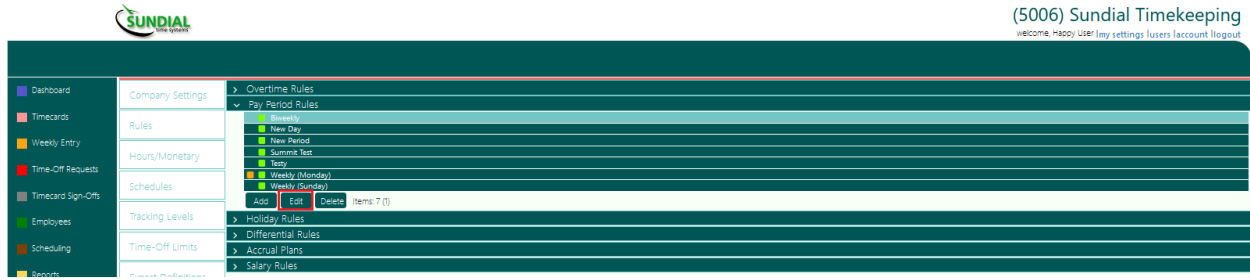
In order to “Edit” an Pay Period rule, you need to first select the “Pay Period” rule by clicking on it as shown below



Once you click on a Pay Period rule, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Now you need to click on the "Edit" button as shown below



Once the "Edit" button is clicked the system will load the Pay Period rule in an editable mode as shown below.

You will now be able to make any changes to existing rule values.

(5006) Sundial Timekeeping
welcome, Hedy User | my settings | users | account | logout

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

Biweekly edit pay period rule

Name:

Export Definition:

Weekly
Start of pay period:

Biweekly
Reference date:

Semimonthly
First day in month:
Second day in month: from

Monthly
First day in month:

Properties

Midnight Offset:

Start Time:

New Day Split:

New Pay Period Split:

Apply Tracking Level:

Until any changes are made to any existing values, the **“Save”** button will be in a disabled state as shown below

(5006) Sundial Timekeeping
welcome, Hedy User | my settings | users | account | logout

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

Biweekly edit pay period rule

Name:

Export Definition:

Weekly
Start of pay period:

Biweekly
Reference date:

Semimonthly
First day in month:
Second day in month: from

Monthly
First day in month:

Properties

Midnight Offset:

Start Time:

New Day Split:

New Pay Period Split:

Apply Tracking Level:

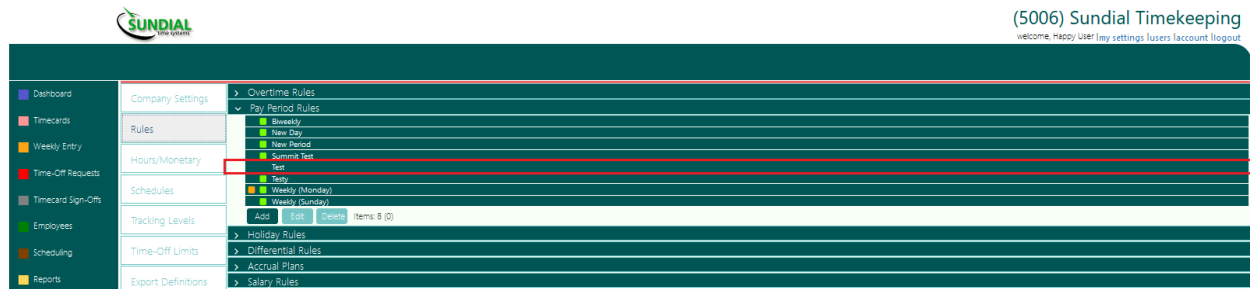
Once you make any changes the system will enable the **“Save”** button as shown below.



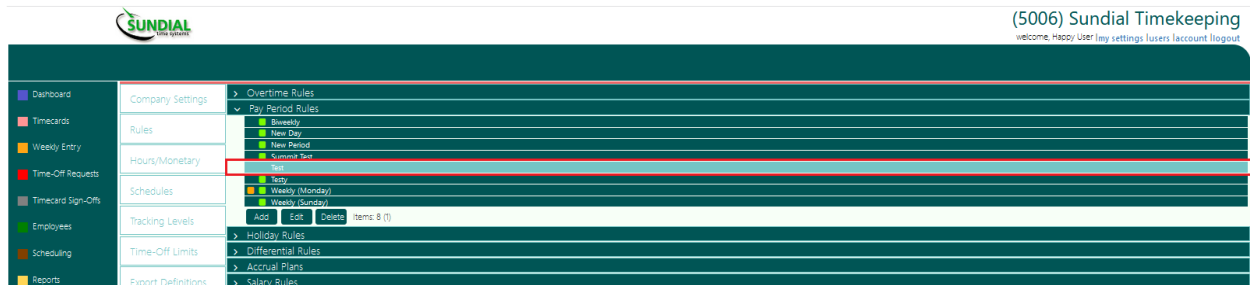
Once you click on the “Save” button the system will save any changes done

Deleting “Pay Period Rules”

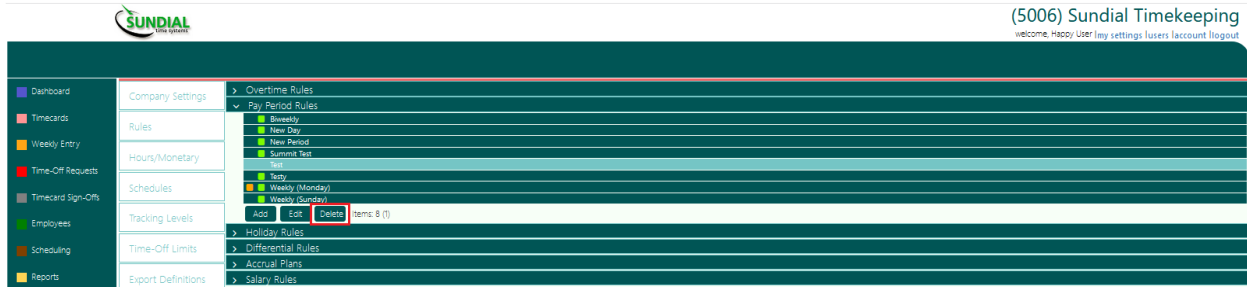
In order to “Delete” an Pay Period rule, you need to first select the “Pay Period” rule by clicking on it as shown below



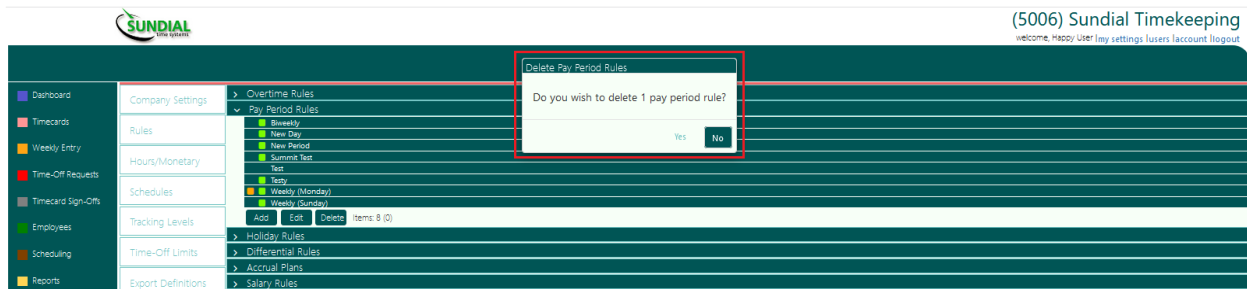
Once you click on an Pay Period rule, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



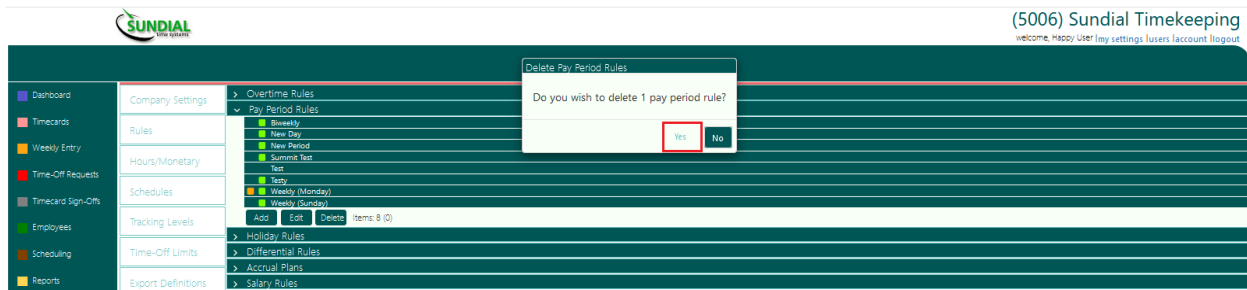
Once selected, you can click on the **“Delete”** icon as shown below



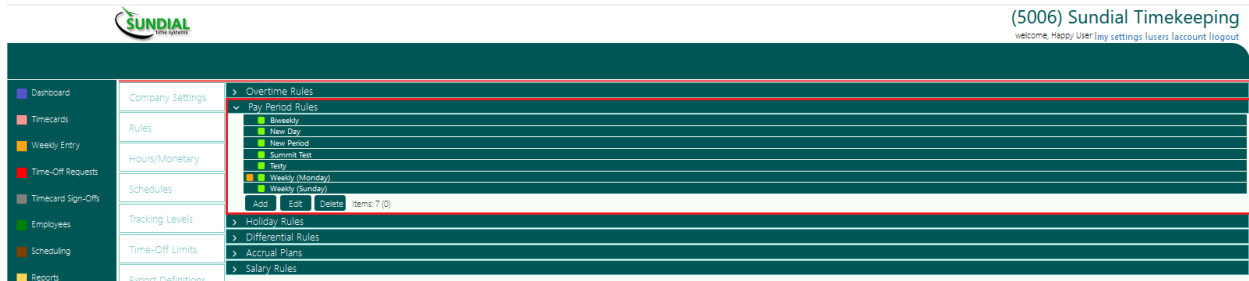
Once you click on **“Delete”** the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click **“Ok”** on this pop-up/overlay as shown below

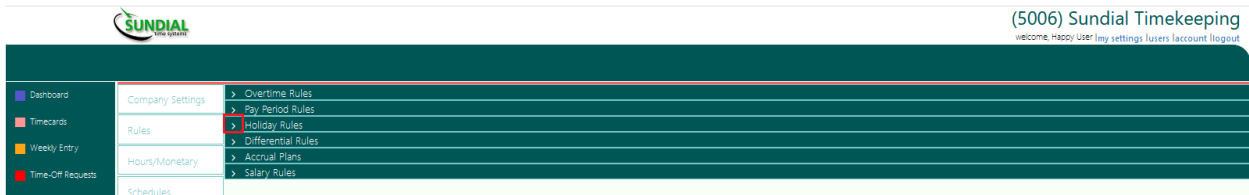


Once you click **“Ok”** the system will then delete the selected rule as shown below



Going into Holiday Rules

In order to go in the “**Holiday Rules**” you need to click on the “**Right Pointed**” arrow head as shown below



Once you click on this arrow the system will expand “**Holiday Rules**” section as shown below



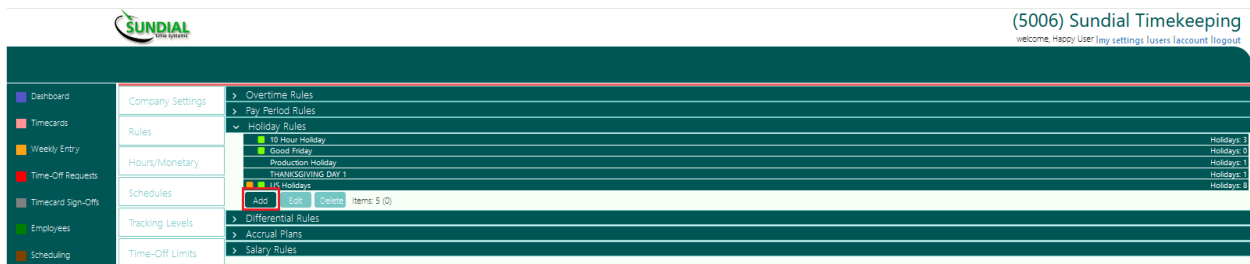
System will display any pre-configured rules under this section. In addition to this you will see 3 buttons as listed below

- **[Button] Add** : Using this button, you can “**Add**” any new Holiday rule to the system
- **[Button] Edit** : Using this button, you can “**Edit**” any existing Holiday rule
- **[Button] Delete** : Using this button, you can “**Delete**” any existing Holiday rule

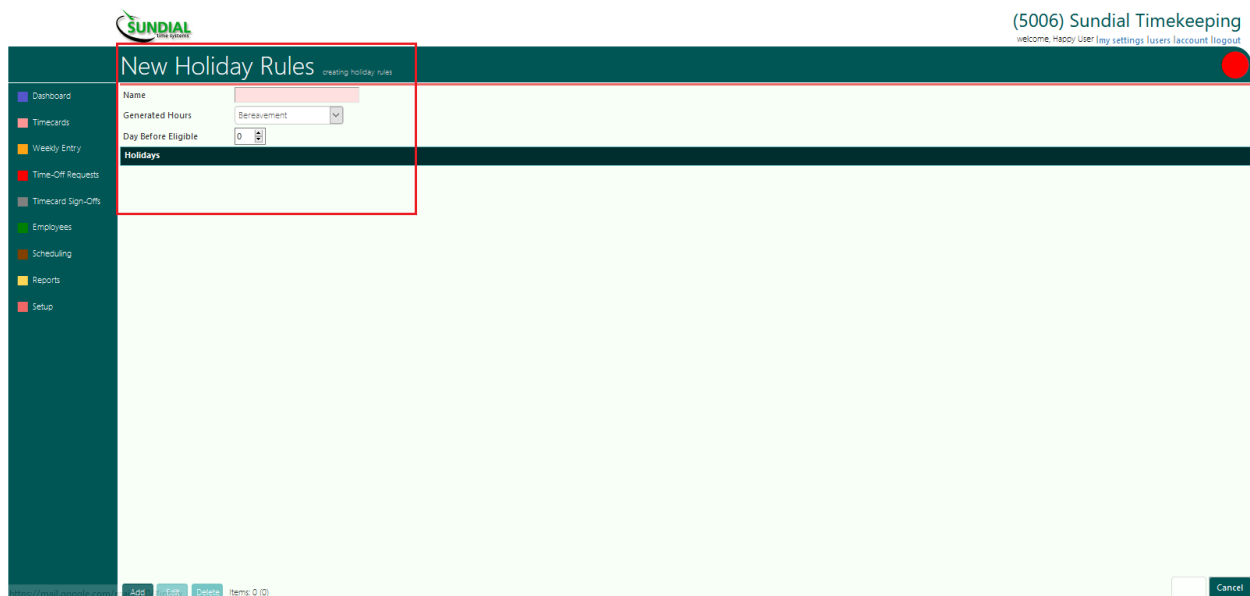
Adding “Holiday Rules”

NOTE: Each Holliday Rule may contain many Holidays. Since employees can only be assigned to one rule, be sure that you Edit existing rules if you are simply adding a new holiday date.

In-order to add **“Holiday Rules”** you need to click on the **“Add”** button as shown below



Once you click on the **“Add”** button, system will display **“Holiday Rules”** page as shown below



Understanding the **“Holiday Rules”** Page

Name : Using this field, you can define the name for the **“Holiday Rule”**

Generated Hours : Using this field, you can pick which type of hours the Holiday rule will generate. This will be whatever Hours Type you use for Holiday Pay.

Day Before Eligible : Use this field to specify the length of employment the employee must have in order to be eligible for Holiday Pay.

Once you provide the Name, Generated Hours and Days before eligible values, you should click on the **“Add”** button as shown below to add the individual Holiday dates that are part of the rule.

New Holiday Rules creating holiday rules

Name:

Generated Hours:

Day Before Eligible:

Holidays

Items: 0 (0)

Once you click on “Add” system will display a pop-up/overlay as shown below

New Holiday Rules creating holiday rules

Name:

Generated Hours:

Day Before Eligible:

Holidays

Items: 0 (0)

Edit Holiday Rule

Holiday Name:

Observation Trigger

Recurring
Every Day in Month

One Time
Date of occurrence:

Holiday Compensation

Paid if worked
Premium: Duration Override:

Observation Offsets

Sunday	<input type="text" value="None"/>
Monday	<input type="text" value="None"/>
Tuesday	<input type="text" value="None"/>
Wednesday	<input type="text" value="None"/>
Thursday	<input type="text" value="None"/>
Friday	<input type="text" value="None"/>
Saturday	<input type="text" value="None"/>

Understanding the "Holiday Rule - pop-up/overlay

Holiday name : Using this field, you can add the name for the individual holiday (i.e National Day) that gets defined under the main holiday rule created

Overservation Trigger

Recurring : Using this field, you can define the rules if it's a recurring holiday. If recurring you need to select the radio button and then define the values as shown below for the text boxes underneath

[Dropdown] Every : Using this dropdown you can choose the day (i.e. 1st, 2nd etc)

[Dropdown] Day in Month : Using this dropdown you can choose the specific day in a month

[Dropdown] Month : Using this dropdown you can choose the month

Example : Every [1] Day in Month [Day in Month] Month [January]. When you define it like this, it means there is a recurring holiday on every first day in January as shown below

The screenshot shows the 'New Holiday Rules' form in the Sundial Timekeeping system. The 'Observation Trigger' section is highlighted with a red box, showing the 'Recurring' radio button selected. The configuration is set to 'Every 1 Day in Month in January'. The 'Observation Offsets' section shows 'Sunday' and 'Monday' both set to 'None'. The user is identified as '(5006) Sundial Timekeeping'.

One time : Using this field, you can define the rules if it's a one time holiday. If one-time you need to select the radio button and then define the date on the calendar option

Date of Occurrence : Using this calendar option, you can pick the day the holiday falls in the year

The screenshot shows the 'New Holiday Rules' form in the Sundial Timekeeping system. The 'Observation Trigger' section is highlighted with a red box, showing the 'One Time' radio button selected. The 'Date of occurrence' is set to '1/31/2021'. The 'Holiday Compensation' section shows 'Paid if worked' as an unchecked checkbox, 'Premium' set to 'None', and 'Duration Override' as an empty field. The user is identified as '(5006) Sundial Timekeeping'.

Holiday Compensation

[Checkbox] Paid if worked : If you check this checkbox the employee would get paid **holiday pay** even if he worked on that day (i.e. if a clocking is done). Unchecking the box means that holiday pay will not occur if the employee works on the holiday.

[Dropdown] Premium : Using this dropdown, you can define a premium that needs to be paid in addition to any holiday pay when the employee works on the Holiday.

- Choices are “None”, “Overtime 1”, “Overtime 2,” and “Additional”

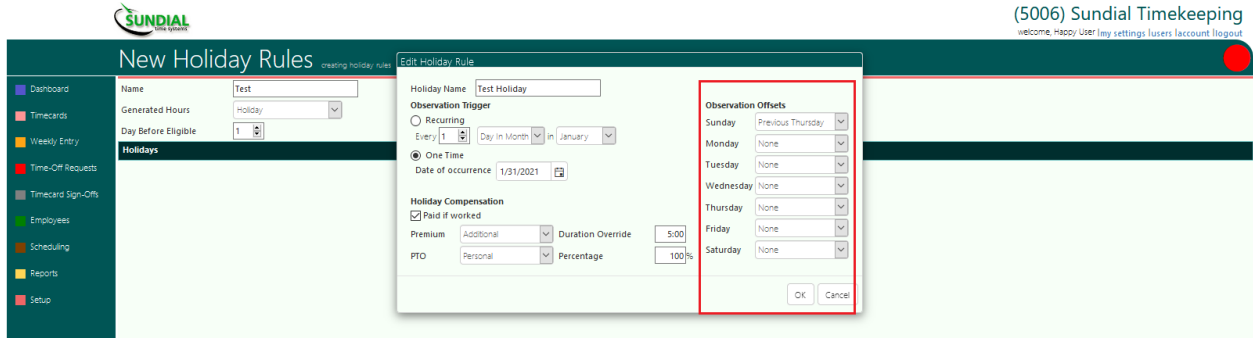
If you choose “None”, there will not be any premium that is paid in addition to the holiday pay. If you choose “Overtime 1 or 2” the system will pay a premium as per the configured overtime pay rates. If you choose “Additional” the system will display an Hours Type dropdown selector and a text box to add a percentage as shown below. If the employee should receive the additional hours equal to their worked hours, enter 100%.

The screenshot shows the 'New Holiday Rules' form in the Sundial Timekeeping system. The 'Holiday Compensation' section is highlighted with a red box. The 'Premium' dropdown is set to 'Additional', and the 'Duration Override' is set to '10%'. The 'Paid if worked' checkbox is checked. The 'Observation Offsets' section shows 'None' for all days of the week.

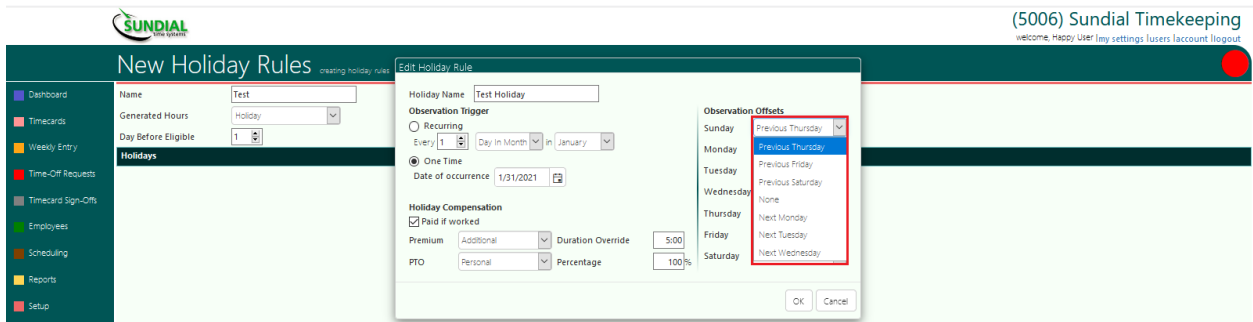
Duration Override : Using this you can define any duration that needs to override if the employee clocks on a set holiday when allocating him a PTO. (if you set this as 5, when employee clocks on a holiday the system will create a 5 hour PTO)

The screenshot shows the 'New Holiday Rules' form in the Sundial Timekeeping system. The 'Holiday Compensation' section is highlighted with a red box. The 'Premium' dropdown is set to 'Additional', and the 'Duration Override' is set to '5:00'. The 'Paid if worked' checkbox is checked. The 'Observation Offsets' section shows 'None' for all days of the week.

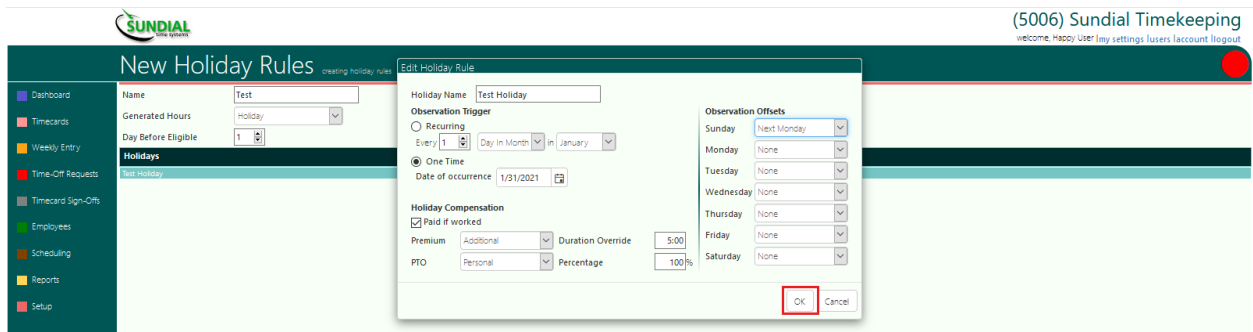
Observation Offsets : Using this you can define any observation offsets.(i.e. if a holiday falls on a Sunday, how the holiday needs to be observed on the following Monday.) as shown below



Day : For any day of the week that a particular Holiday may land, you can specify that it should be observed on one of the previous 3 days, one the subsequent 3 days, or specify “None” if no offset is needed as shown below



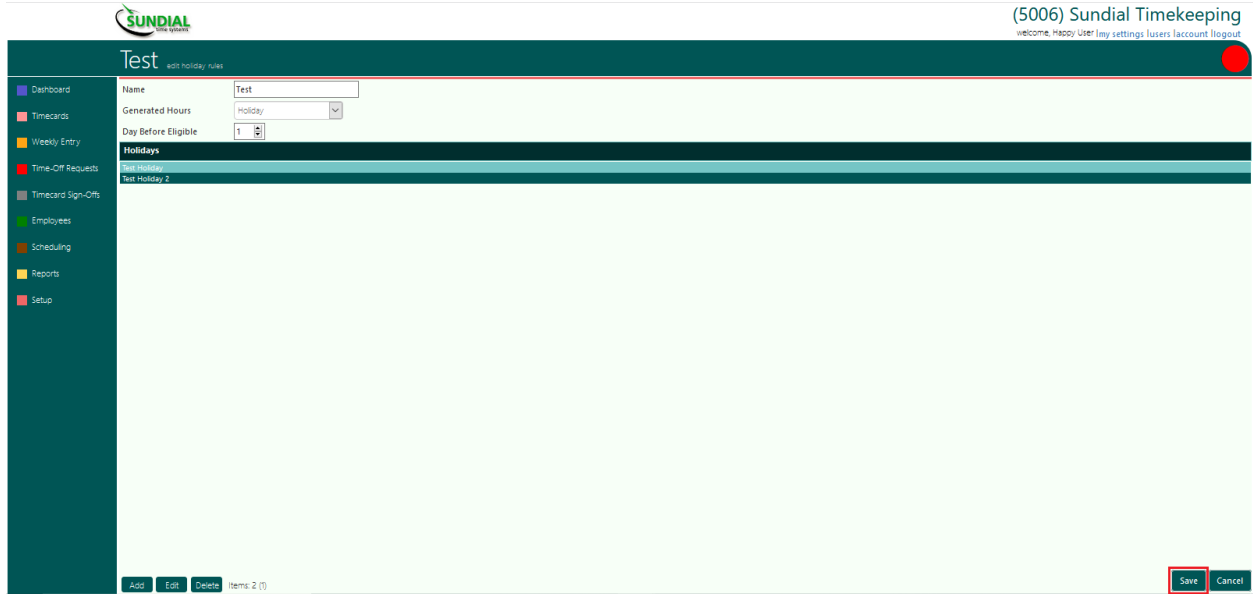
Once the selections are made, you need to click on the “**OK**” button as shown below



Once the “**OK**” button is clicked system will list down the created holiday as shown below

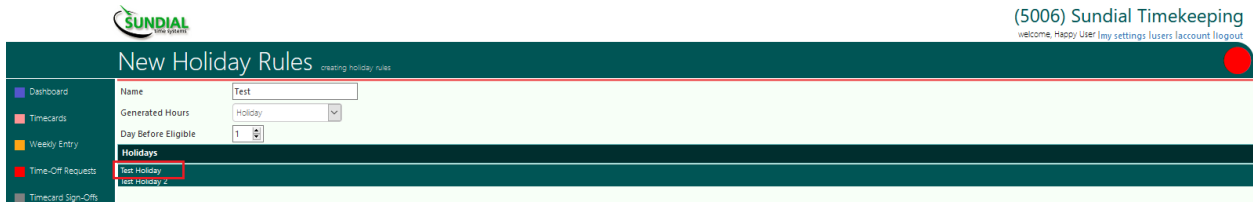


After this, you need to click on the **“Save”** button as shown below for the created **“Holiday”** to be saved

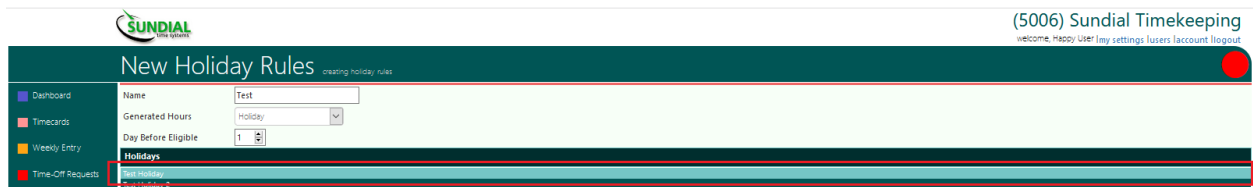


Editing “Holidays”

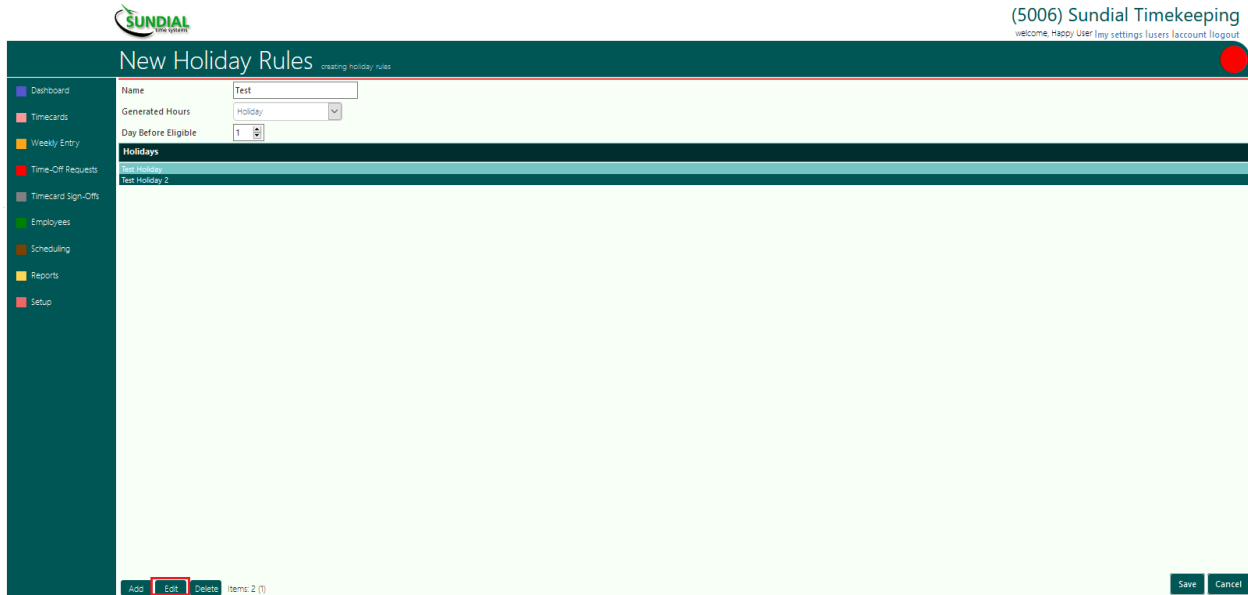
In order to **“Edit”** a Holiday, you need to first select the **“Holiday”** by clicking on it as shown below



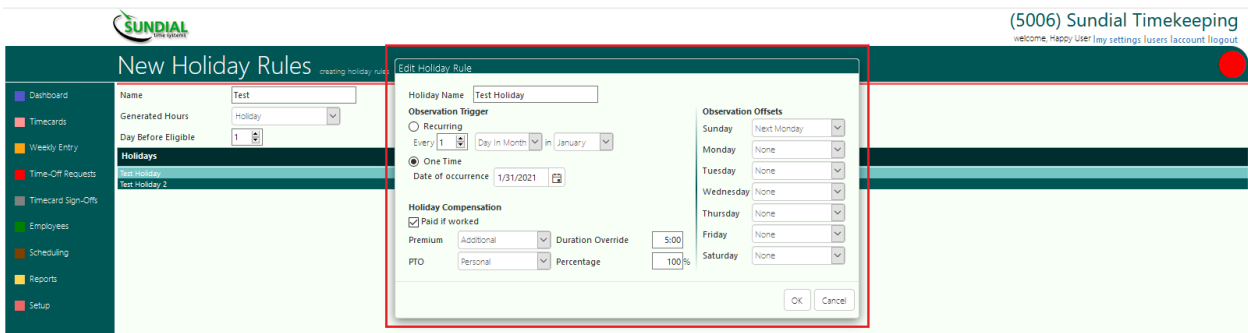
Once you click on a Holiday the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Now you need to click on the “Edit” button as shown below

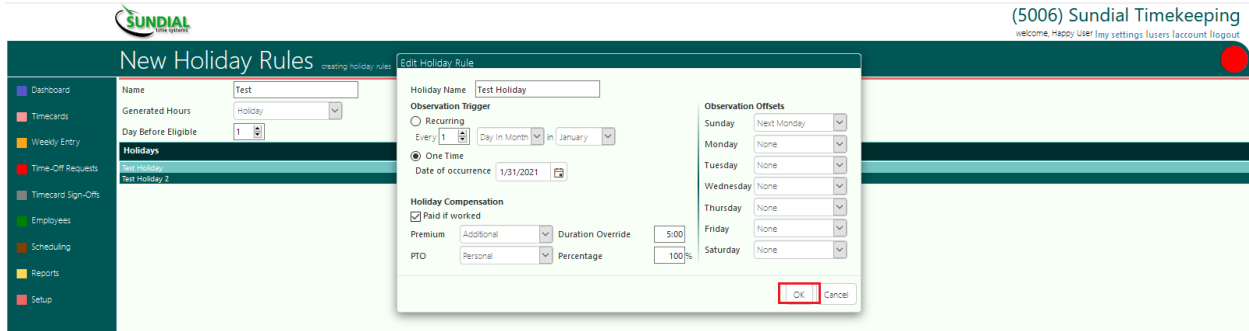


Once the “Edit” button is clicked the system will load the Pay Period rule in an editable mode as shown below.

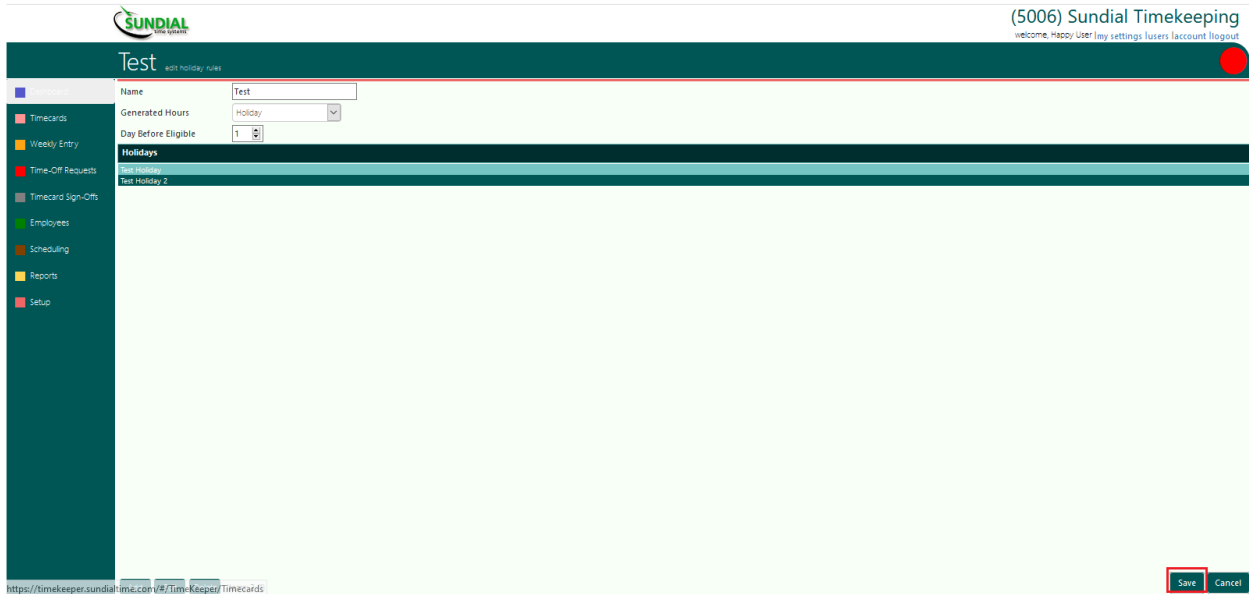


You will now be able to make any changes to existing Holiday values.

Once you make the changes, you need to click on the “Ok” button in order for the system to save the changes



Once you do this, you need to click on the **“Save”** button as shown below



Deleting “Holidays”

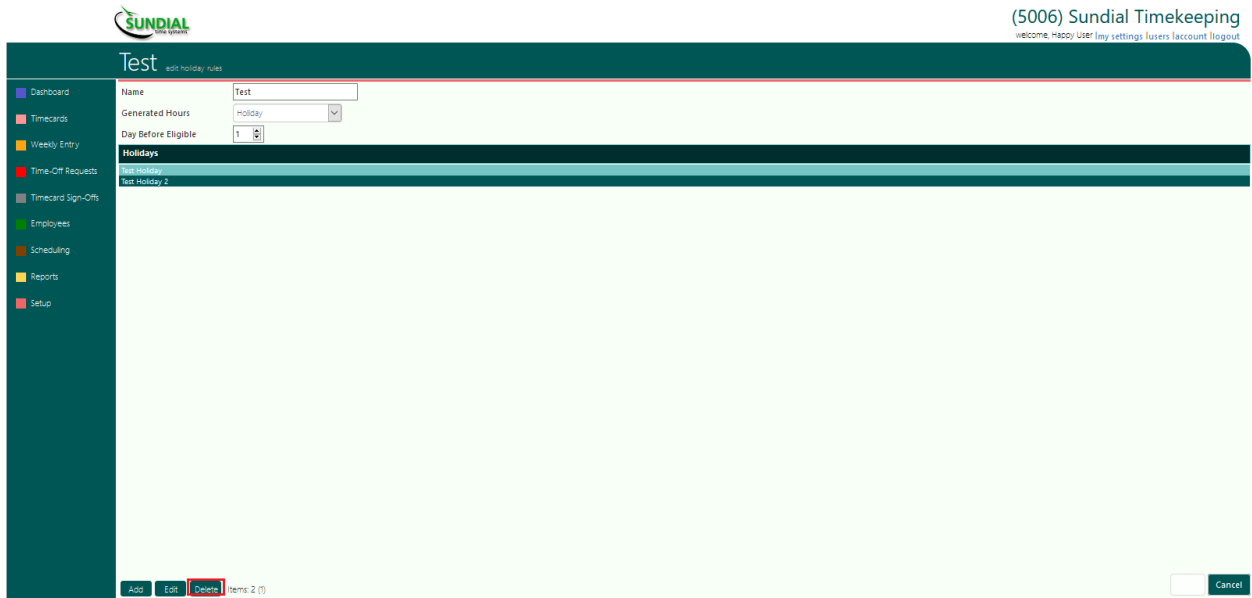
In order to **“Delete”** a Holiday, you need to first select the **“Holiday”** by clicking on it as shown below



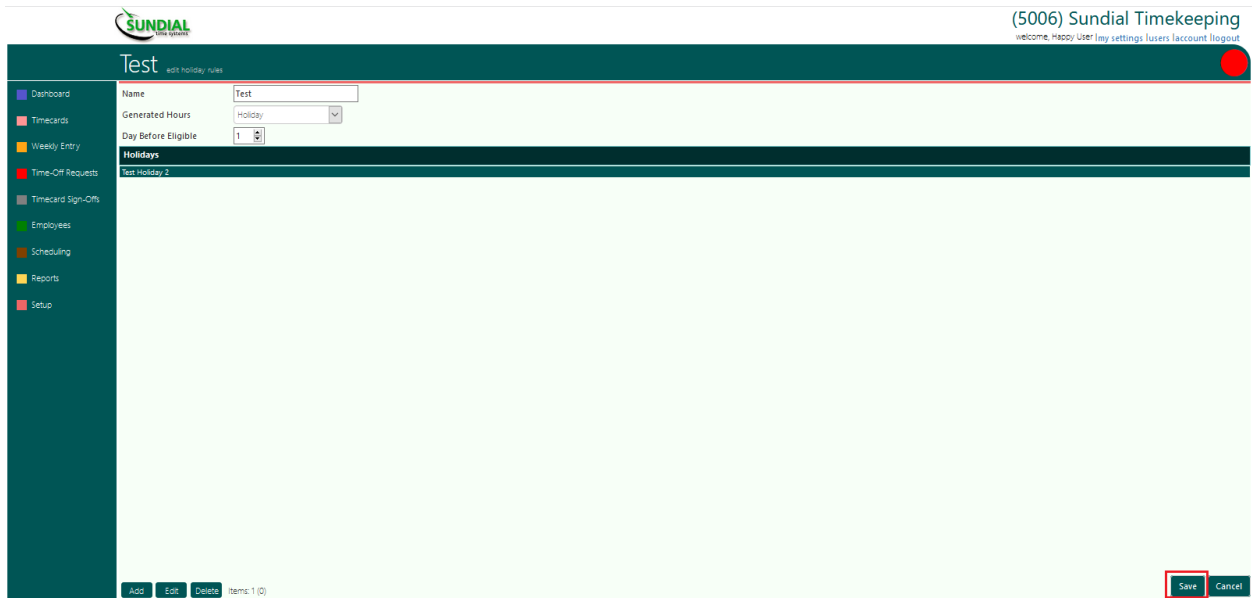
Once you click on a **Holiday**, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Once selected, you can click on the **“Delete”** button as shown below

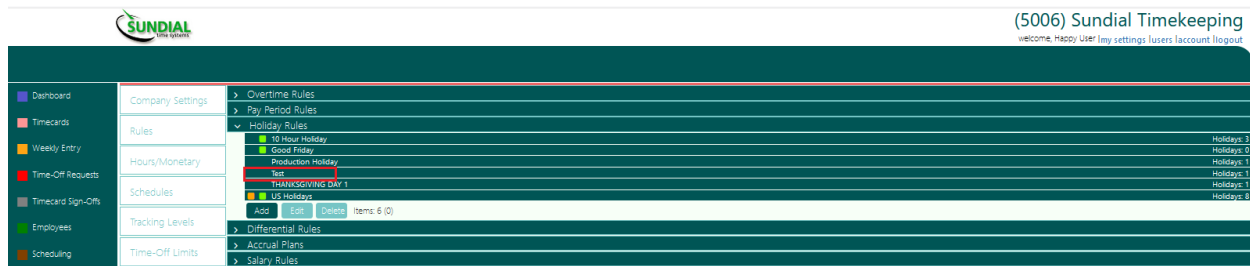


Once you click on **“Delete”** the system will delete the holiday. Once its deleted you need to click on the **“Save”** button as shown below

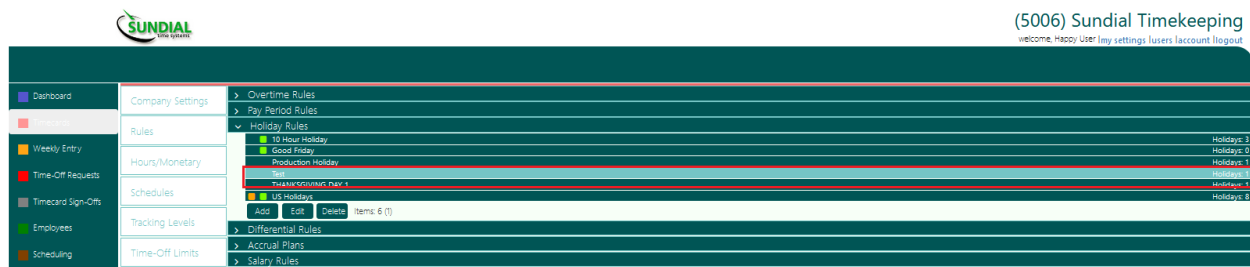


Editing “Holiday Rules”

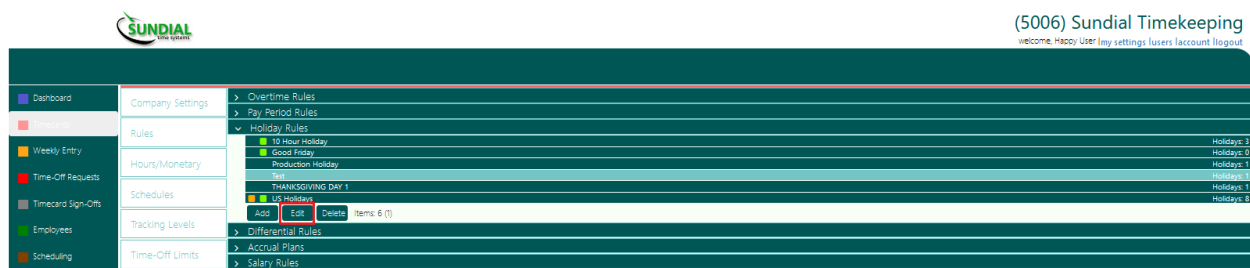
In order to “**Edit**” an Holiday Rules, you need to first select the “**Holiday**” rule by clicking on it as shown below



Once you click on a **Holiday Rule**, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Now you need to click on the “**Edit**” button as shown below

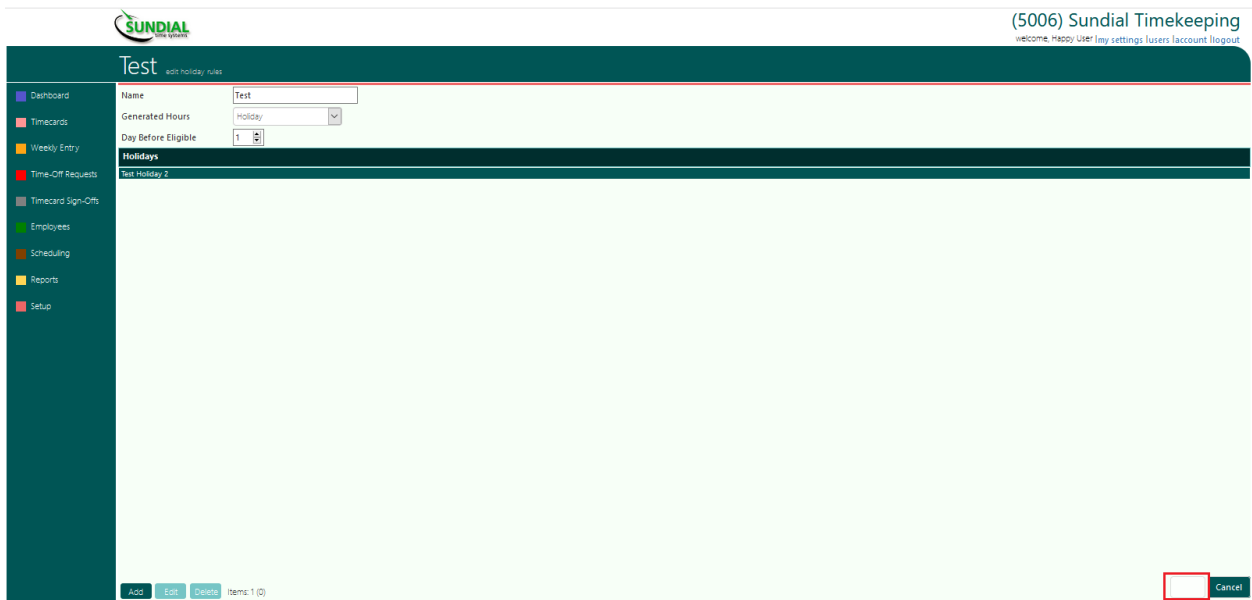


Once the “**Edit**” button is clicked the system will load the Pay Period rule in an editable mode as shown below.

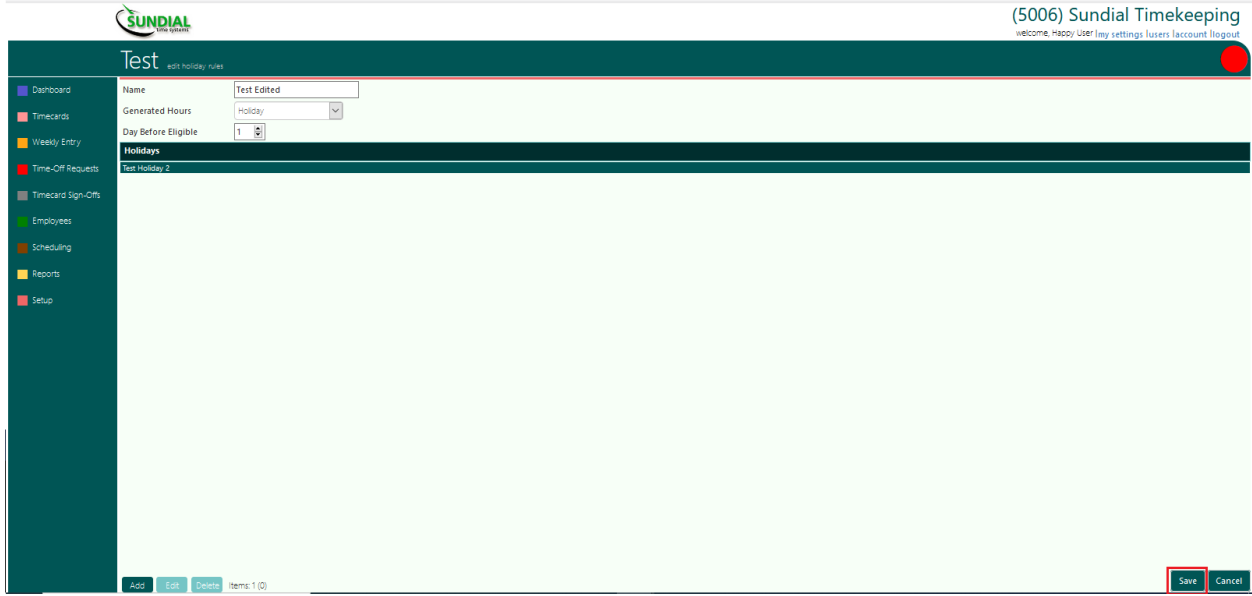


You will now be able to make any changes to existing rule values.

Until any changes are made to any existing values, the “**Save**” button will be in a disabled state as shown below



Once you make any changes the system will enable the “**Save**” button as shown below.

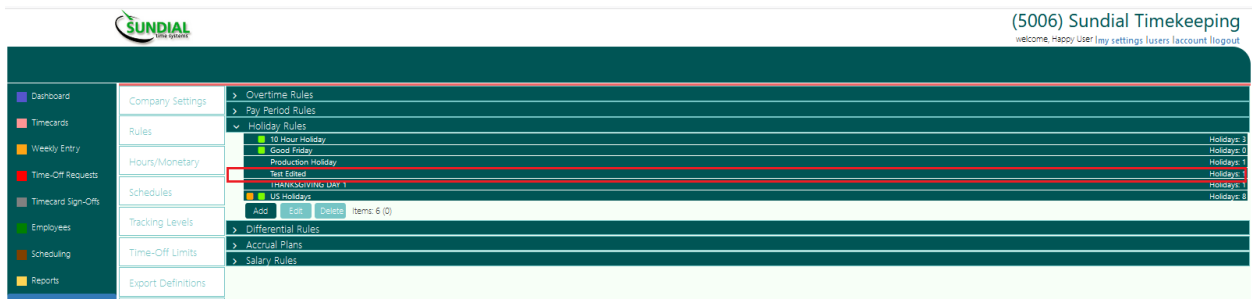


Once you click on the **“Save”** button the system will save any changes done as shown below



Deleting “Holiday Rules”

In order to **“Delete”** an Holiday Rule, you need to first select the **“Holiday”** rule by clicking on it as shown below



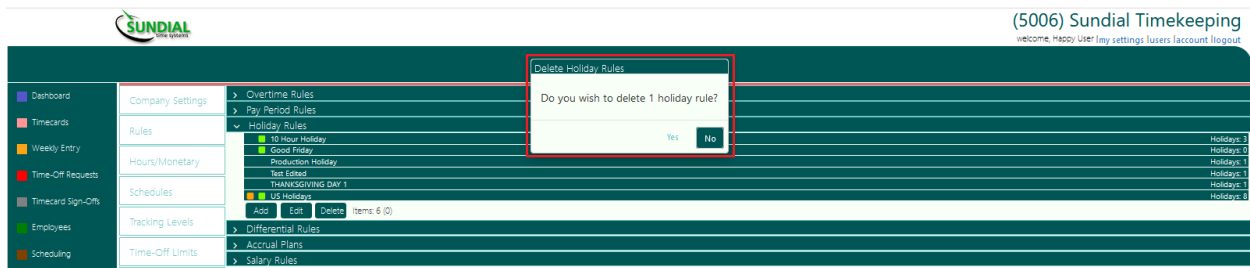
Once you click on an Holiday Rule, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



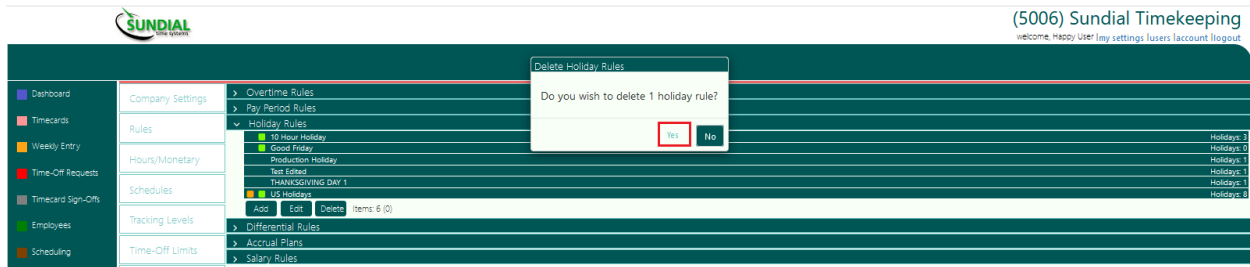
Once selected, you can click on the “Delete” icon as shown below



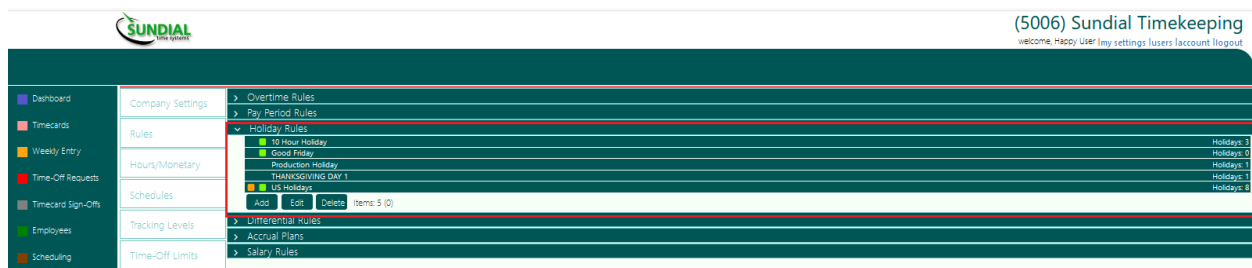
Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click “OK” on this pop-up/overlay as shown below

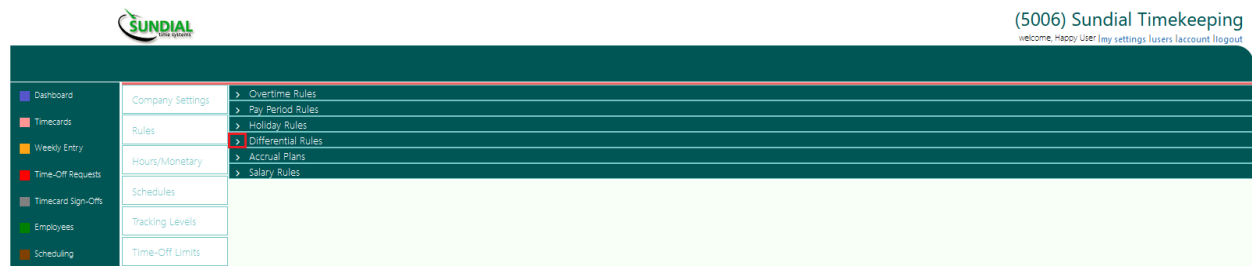


Once you click “Ok” the system will then delete the selected rule as shown below

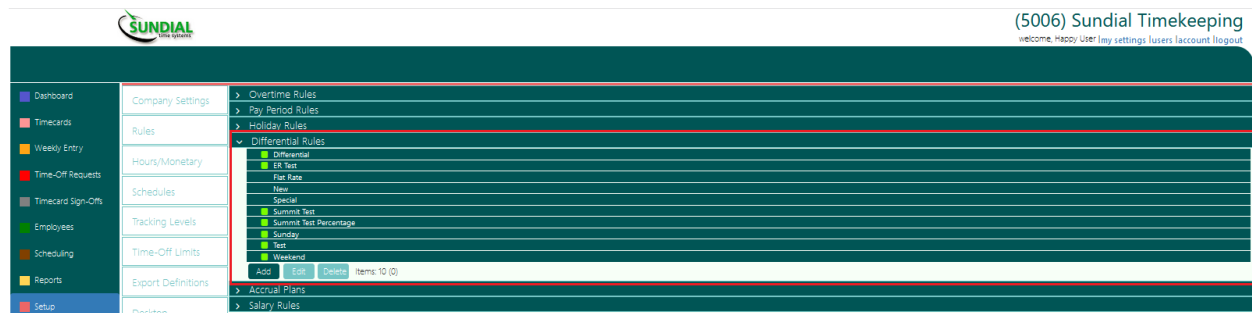


Going into Differential Rules

In order to go in the “Differential Rules” you need to click on the “Right Pointed” arrow head as shown below



Once you click on this arrow the system will expand “Differential Rules” section as shown below

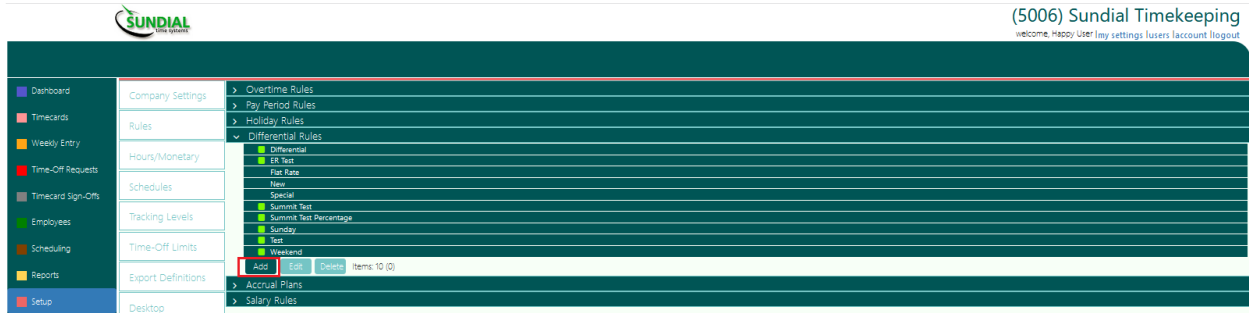


System will display any pre-configured rules under this section. In addition to this you will see 3 buttons as listed below

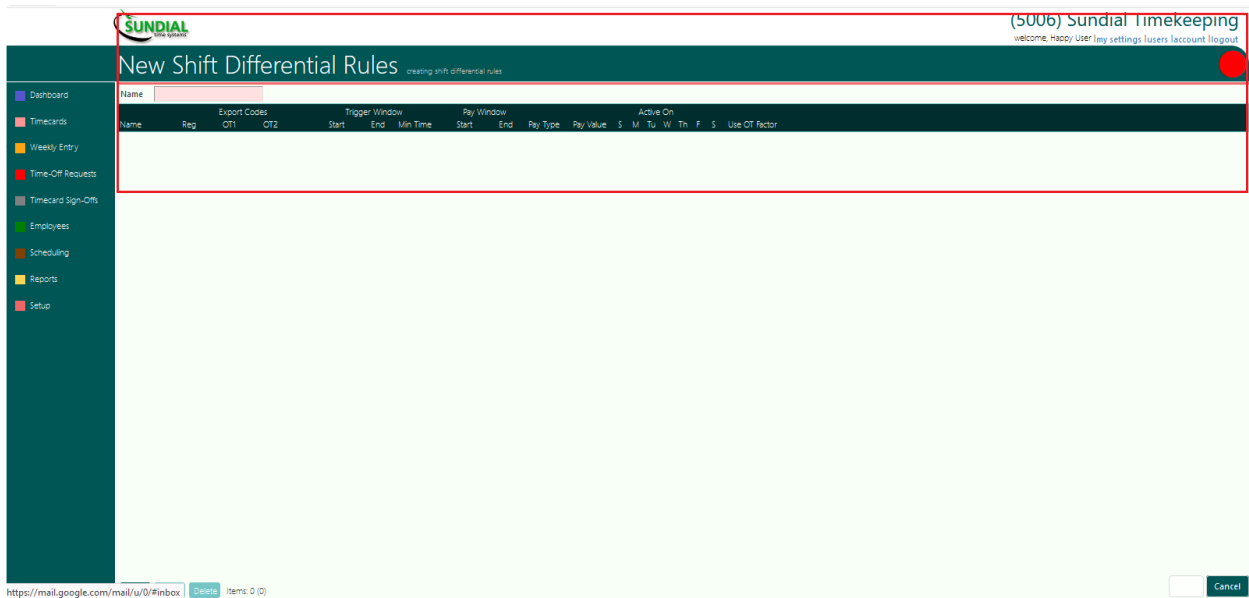
- **[Button] Add** : Using this button, you can “Add” any new Differential rule to the system
- **[Button] Edit** : Using this button, you can “Edit” any existing Differential rule
- **[Button] Delete** : Using this button, you can “Delete” any existing Differential rule

Adding “Differential Rules”

In-order to add “Differential Rules” you need to click on the “Add” button as shown below



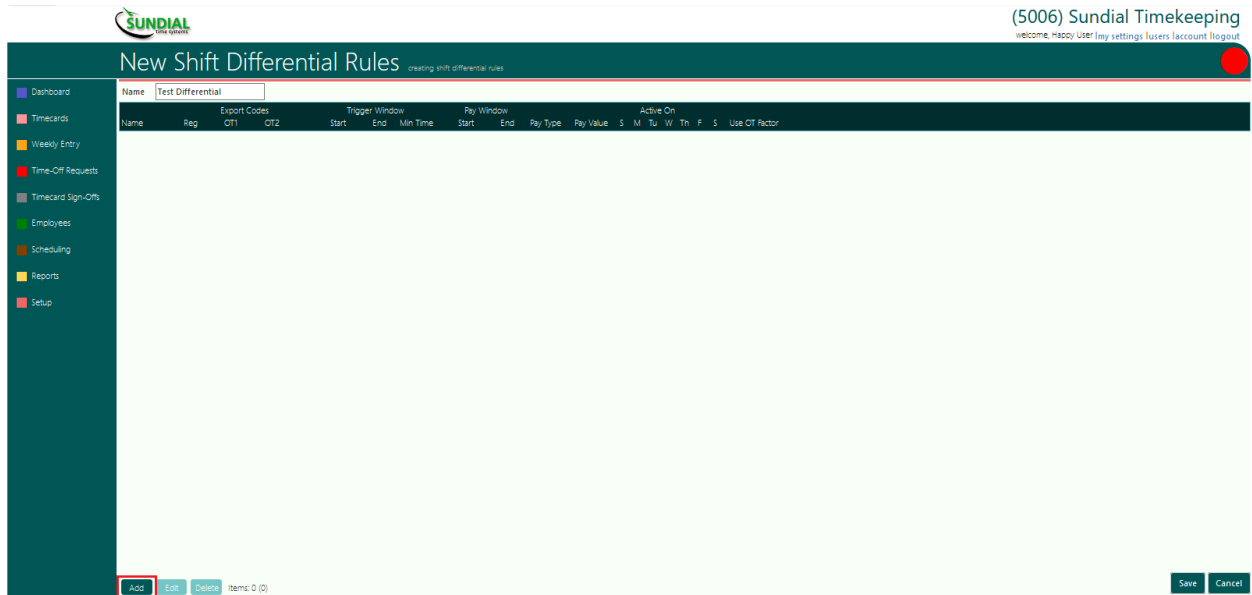
Once you click on the “Add” button, system will display “New Differential Rule” page as shown below



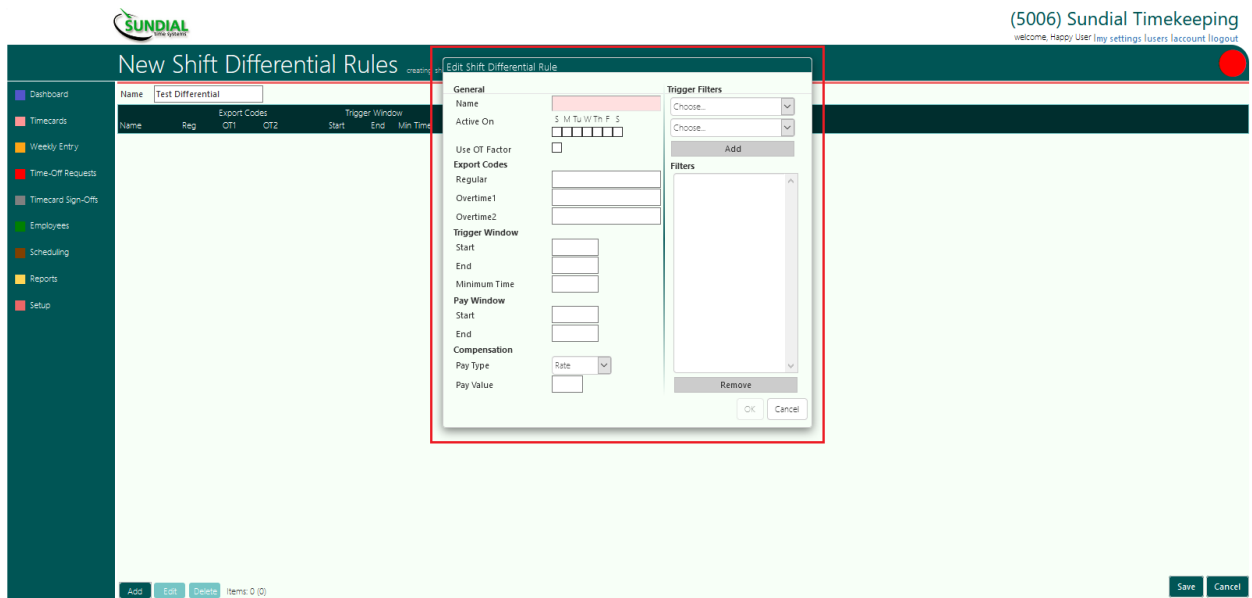
Understanding the “Differential Rules” Page

Name : Using this field, you can define the name for the “Differential Rule”

Once you provide a name, you can click on the “**Add**” button as shown below



Once you click on “**Add**” system will display a pop-up/overlay as shown below



Understanding the “Differential Rule - pop-up/overlay

Name : Using this field, you can add the name for the individual differential rule that gets defined under main differential rule created

[Checkbox] Active On : Using this checkbox, you can check on the days the differential rule is active on

[Checkbox] Use OT Factor : Using this checkbox, you can check if the OT factor has to be used or keep it unchecked if not in use

Export Codes

Regular : Specify an export code, if needed, for Regular Differential time

Overtime1 : Specify an export code, if needed, for Overtime 1 Differential time

Overtime2 : Specify an export code, if needed, for Overtime 2 Differential time

Trigger Window

All three elements have to succeed in order for the rule to activate. Blank values automatically pass as meeting the condition.

Start : Employees’ workspan must include time on or after Start time for the condition to pass.

End : Employees’ workspan must include time on or before End time for the condition to pass.

Minimum Time : Employees’ workspan must include at least this much time between Start and End for the condition to pass.

Pay Window

Start : Specify the the Time that Differential pay will begin. When left blank, the system uses the start of the shift.

End : Specify the the Time that Differential pay will end. When left blank, the system uses the end of the shift.

Compensation

[Dropdown] Pay Type : Using this dropdown you can define the pay type for the differential rule. You have the following options to choose from (Rate, Percentage and Flat).

Rate uses the Pay Value as the rate, multiplied by the Pay Window Duration.

Percentage uses the Pay Value as a percentage of the Employee’s Rate, multiplied by the Pay Window Duration.

Flat uses the Pay Value as a direct monetary amount and DOES NOT multiply it by the Pay Window Duration.

[Dropdown] Pay Value : Using this field, you can define the pay value based on the pay type that is chosen

Trigger Filters

Implementing a Trigger Filter causes the system to ensure that the employee’s time is assigned to one of the Tracking Items included in the Filter rule. An empty Trigger Filter indicates that the filter is unused.

Failing a Trigger Filter prevents the Differential just like failing the Trigger Window conditions would.

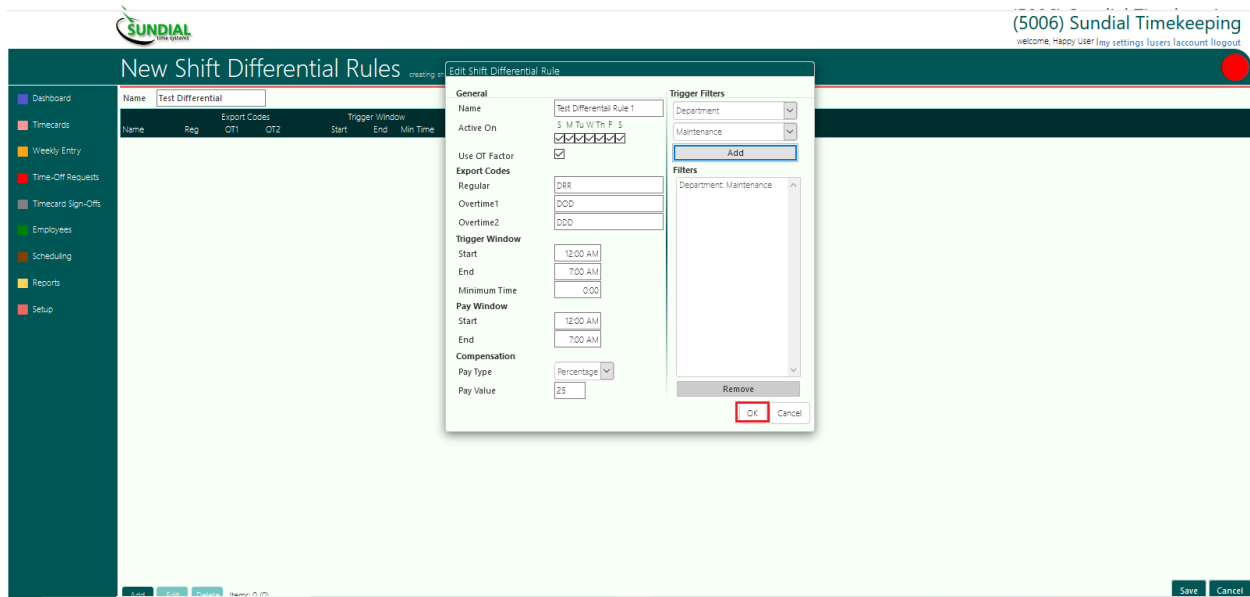
[Dropdown] Filter 1 : Select the Tracking Level of your desired filter item.

[Dropdown] Filter 2 : Select the specific Tracking Item to add to the filter list

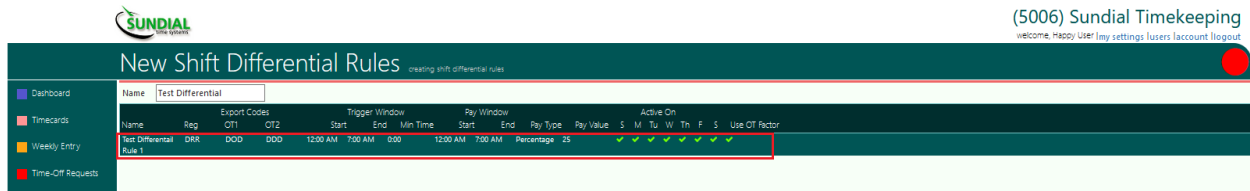
[Button] Add : Using this button, you can add the selected trigger filters

[Button] Remove : After highlighting an Item in the “Filters” list, use this button to remove it

Once the selections are made, you need to click on the “**Ok**” button as shown below



Once the “**Ok**” button is clicked system will display the differential as shown below



After this, you need to click on the “**Save**” button as shown below for the created “Differential” to be saved

(5006) Sundial Timekeeping
welcome, hsp@ user | my settings | users | account | logout

New Shift Differential Rules

creating shift differential rules

Name:

Name	Reg	Export Codes		Trigger Window			Pay Window		Pay Type	Pay Value	Active On							Use OT Factor
		OT1	OT2	Start	End	Min Time	Start	End			S	M	Tu	W	Th	F	S	
Test Differential Rule 1	DRR	DDD	DDD	12:00 AM	7:00 AM	0:00	12:00 AM	7:00 AM	Percentage	25	✓	✓	✓	✓	✓	✓	✓	

Add Edit Delete Items: 1 (0)

Save Cancel

Editing “Differentials”

In order to “Edit” a Differential, you need to first select the “Differential” by clicking on it as shown below

(5006) Sundial Timekeeping
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New Shift Differential Rules

creating shift differential rules

Name:

Name	Reg	Export Codes		Trigger Window			Pay Window		Pay Type	Pay Value	Active On							Use OT Factor
		OT1	OT2	Start	End	Min Time	Start	End			S	M	Tu	W	Th	F	S	
Test Differential Rule 1	DRR	DDD	DDD	12:00 AM	7:00 AM	0:00	12:00 AM	7:00 AM	Percentage	25	✓	✓	✓	✓	✓	✓	✓	

Once you click on a Differential the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

(5006) Sundial Timekeeping
welcome, hsp@ user | my settings | users | account | logout

New Shift Differential Rules

creating shift differential rules

Name:

Name	Reg	Export Codes		Trigger Window			Pay Window		Pay Type	Pay Value	Active On							Use OT Factor
		OT1	OT2	Start	End	Min Time	Start	End			S	M	Tu	W	Th	F	S	
Test Differential Rule 1	DRR	DDD	DDD	12:00 AM	7:00 AM	0:00	12:00 AM	7:00 AM	Percentage	25	✓	✓	✓	✓	✓	✓	✓	
Test Differential Rule 2									Rate		✓	✓	✓	✓	✓	✓	✓	

Now you need to click on the “Edit” button as shown below

New Shift Differential Rules creating shift differential rules

Name	Reg	Export Codes	OT1	OT2	Trigger Window	Start	End	Min Time	Pay Window	Start	End	Pay Type	Pay Value	Use OT Factor	Active On
Test Differential Rule 1	DRR	DDD	DDD		12:00 AM	7:00 AM	0:00	12:00 AM	7:00 AM	Percentage	25				<input checked="" type="checkbox"/> M <input checked="" type="checkbox"/> Tu <input checked="" type="checkbox"/> W <input checked="" type="checkbox"/> Th <input checked="" type="checkbox"/> F <input checked="" type="checkbox"/> S
Test Differential Rule 2															

Once the “**Edit**” button is clicked the system will load the Differential in an editable mode as shown below.

New Shift Differential Rules creating

Edit Shift Differential Rule

General

Name:

Active On: S M Tu W Th F S

Use OT Factor:

Export Codes

Regular:

Overtime1:

Overtime2:

Trigger Window

Start:

End:

Minimum Time:

Pay Window

Start:

End:

Compensation

Pay Type:

Pay Value:

Trigger Filters

Choose...

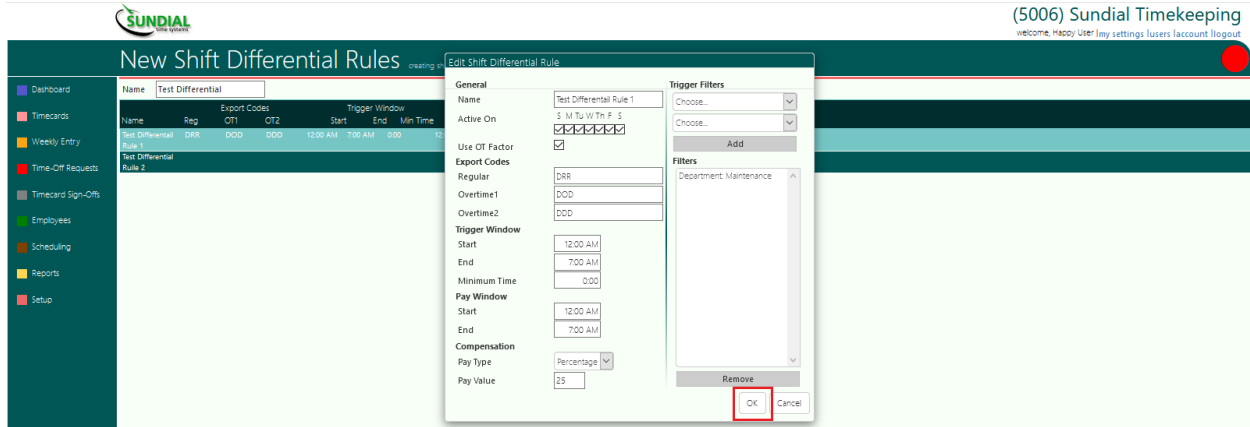
Choose...

Filters

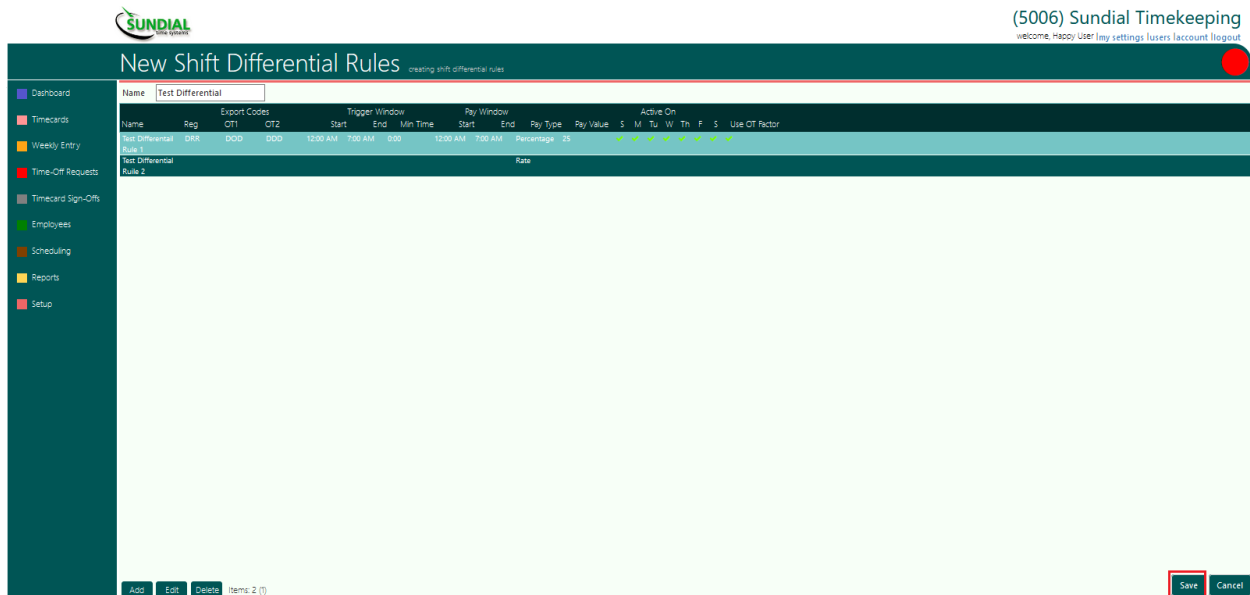
Department Maintenance

You will now be able to make any changes to existing Differential values.

Once you make the changes, you need to click on the “**OK**” button in order for the system to save the changes

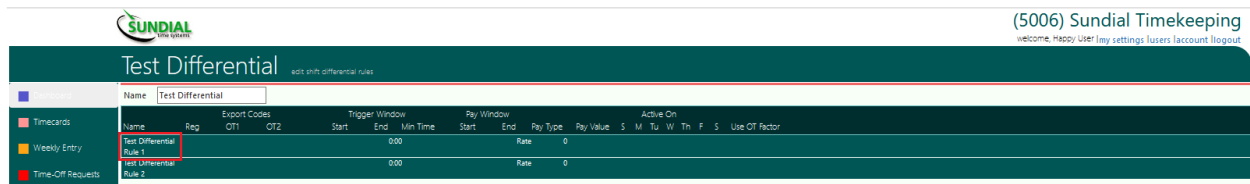


Once you do this, you need to click on the **“Save”** button as shown below

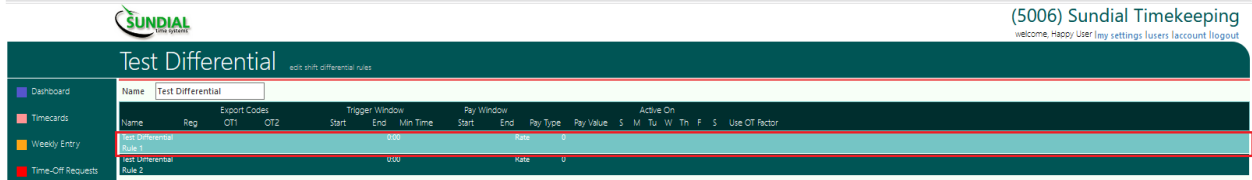


Deleting “Differentials”

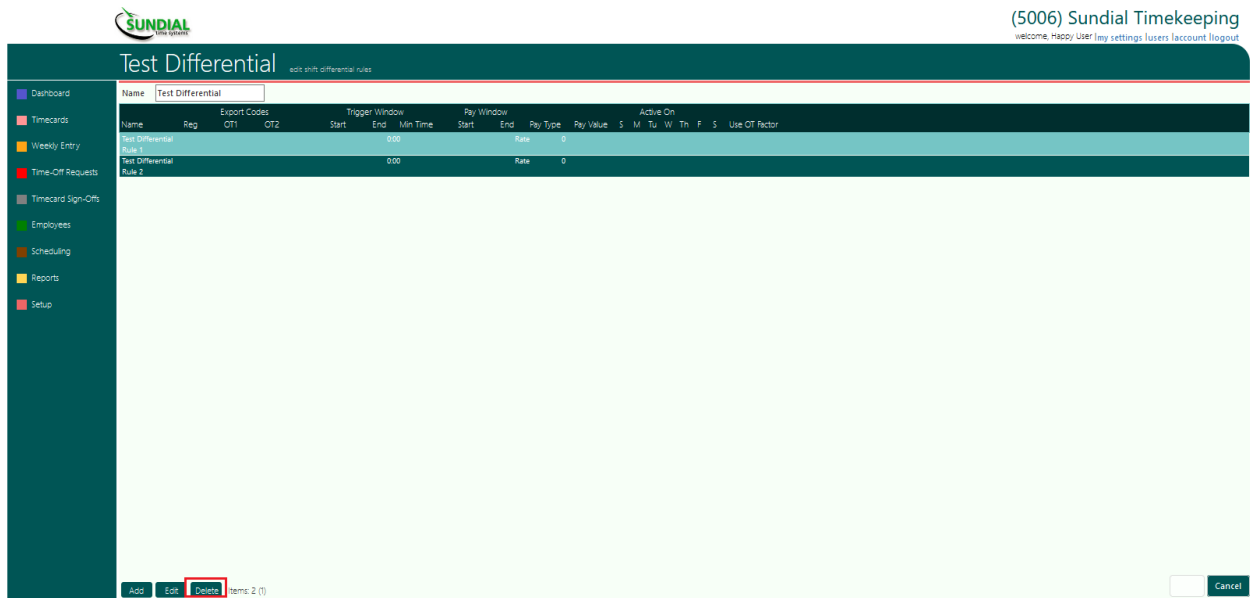
In order to **“Delete”** a Differential, you need to first select the **“Differential”** by clicking on it as shown below



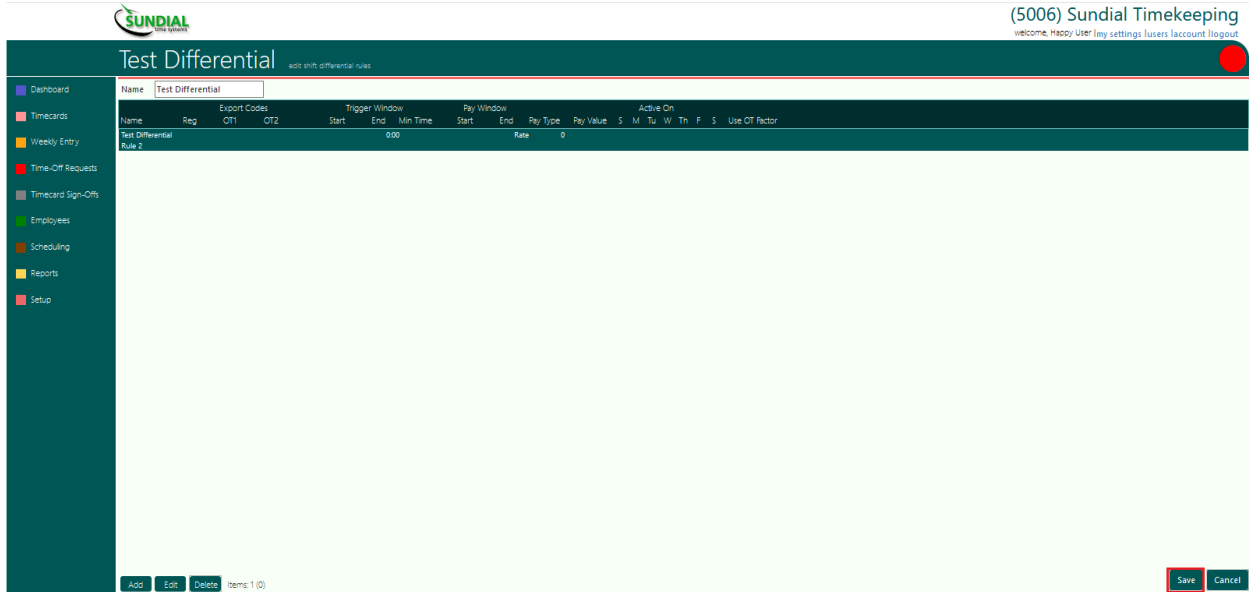
Once you click on a **Differential**, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Once selected, you can click on the **“Delete”** button as shown below

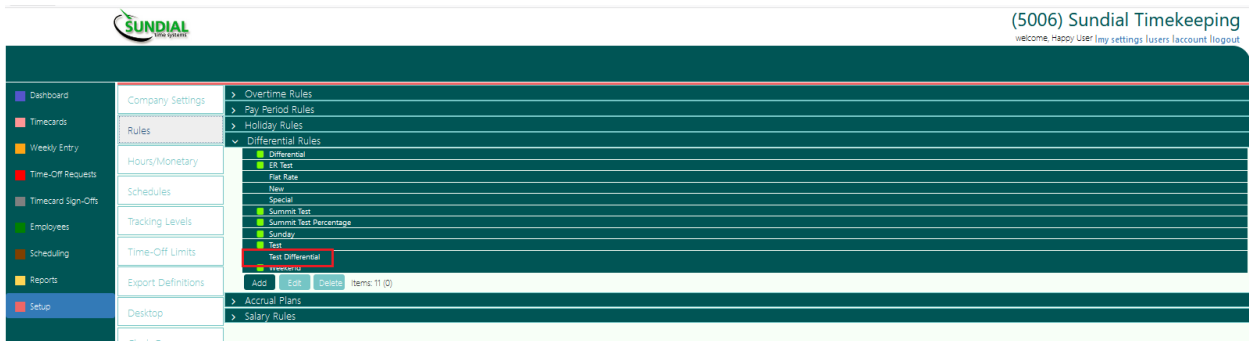


Once you click on **“Delete”** the system will delete the Differential. Once it's deleted you need to click on the **“Save”** button as shown below

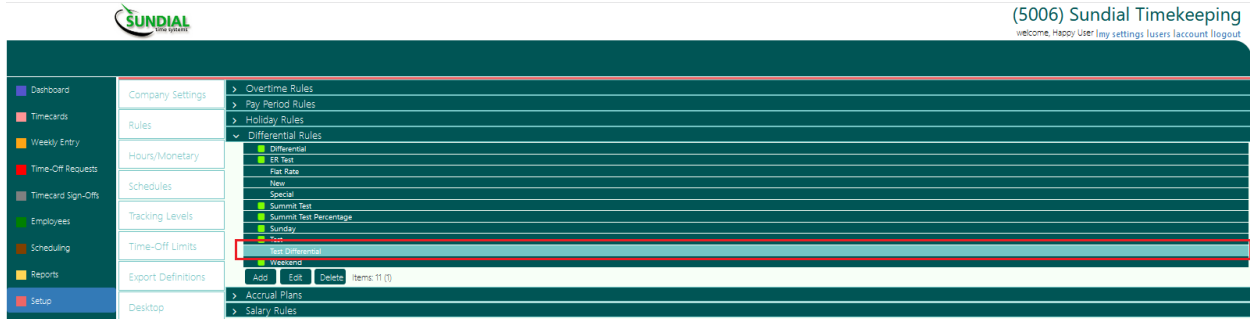


Editing “Differential Rules”

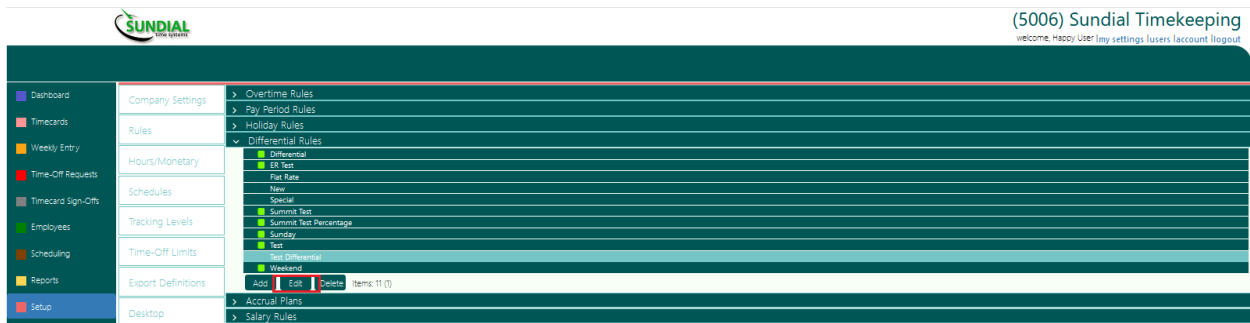
In order to “**Edit**” an Differential Rules, you need to first select the “**Differential**” rule by clicking on it as shown below



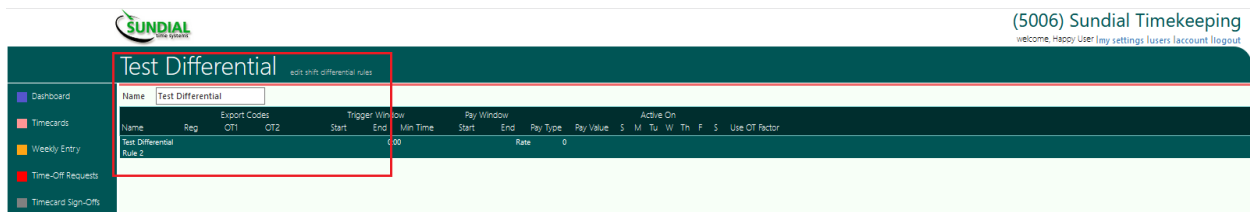
Once you click on a **Differential Rule**, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Now you need to click on the **“Edit”** button as shown below

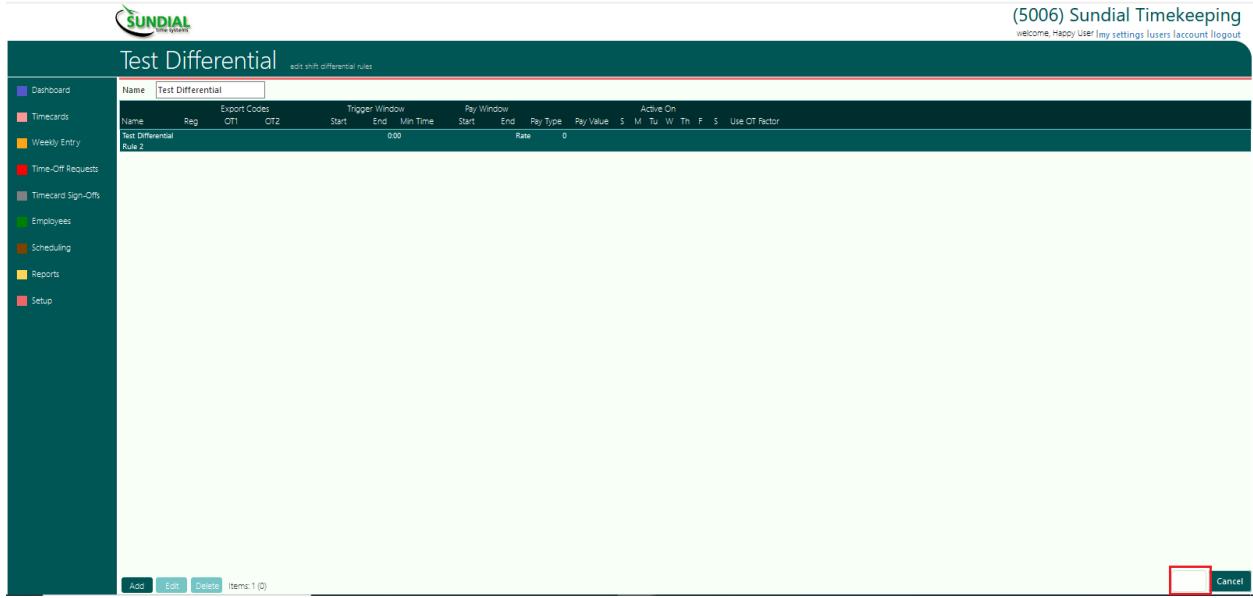


Once the **“Edit”** button is clicked the system will load the Differential rule in an editable mode as shown below.

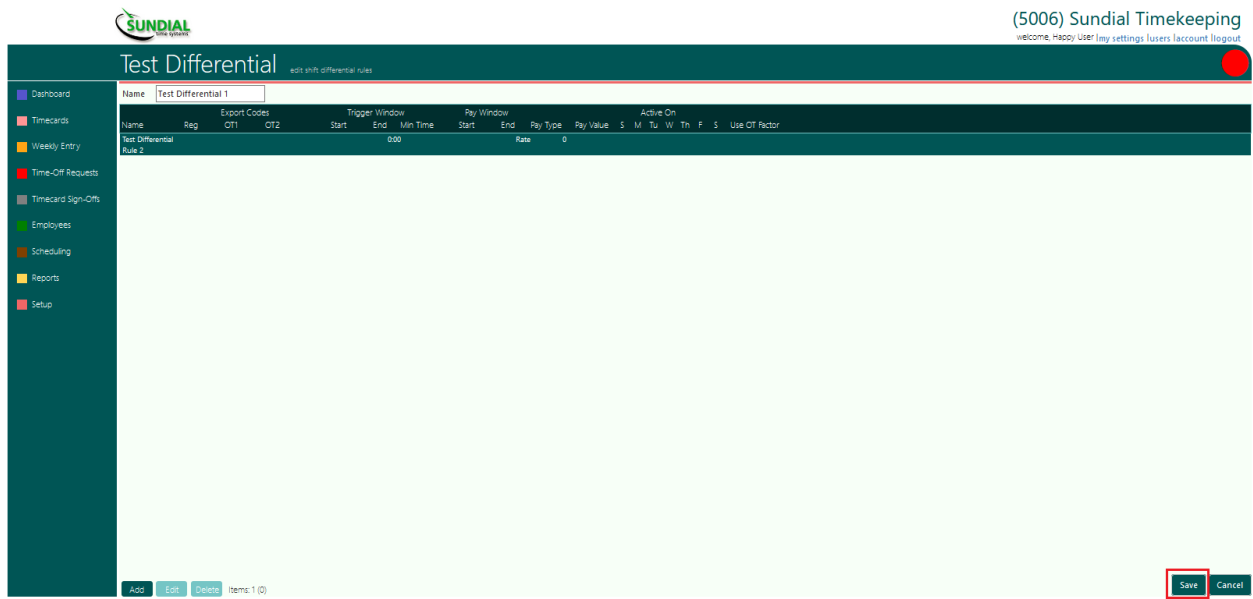


You will now be able to make any changes to existing rule values.

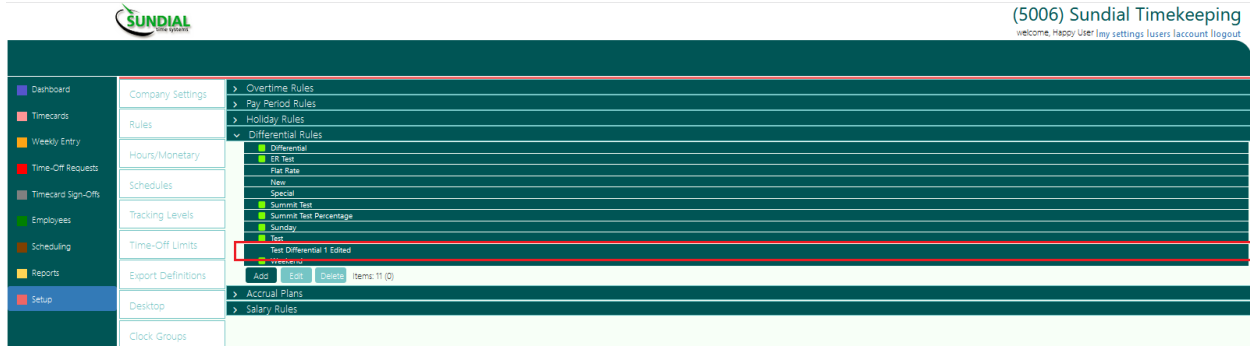
Until any changes are made to any existing values, the **“Save”** button will be in a disabled state as shown below



Once you make any changes the system will enable the “Save” button as shown below.

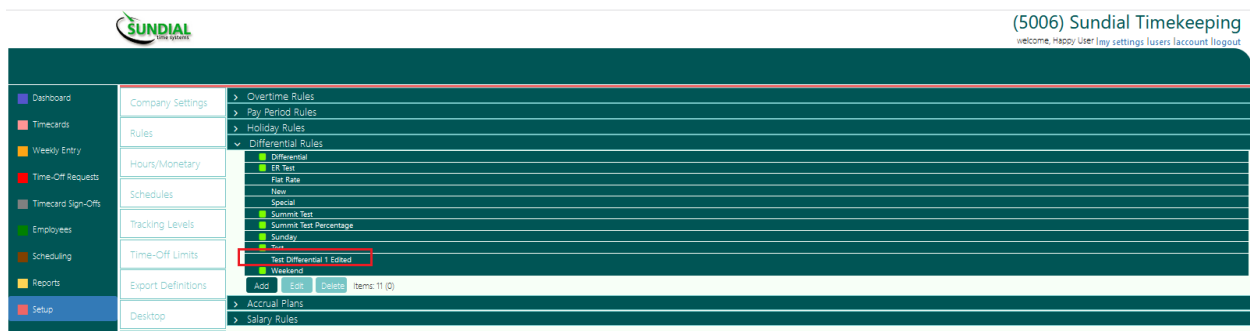


Once you click on the “Save” button the system will save any changes done as shown below

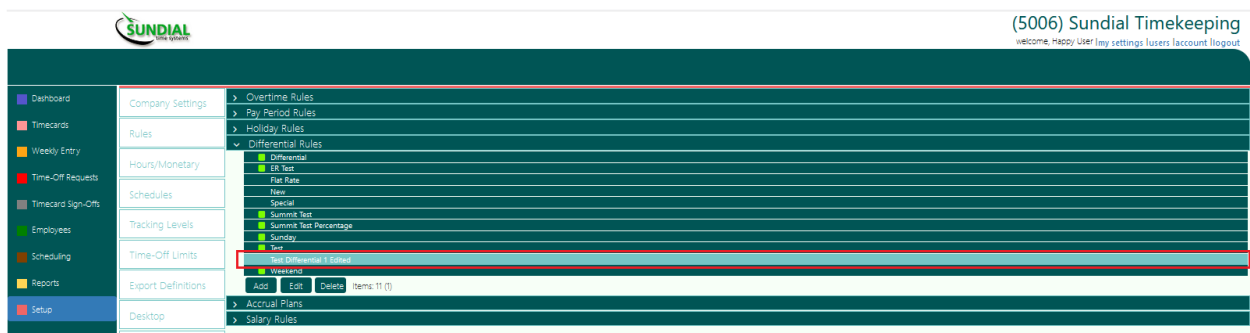


Deleting “Differential Rules”

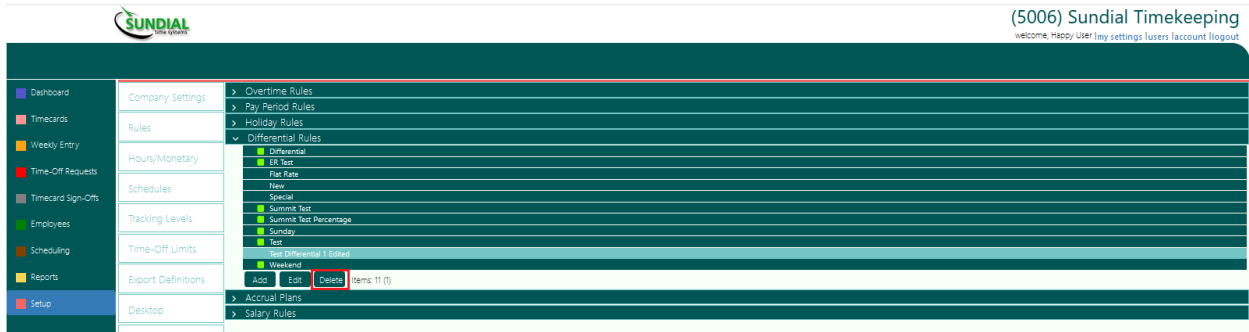
In order to “Delete” a Differential Rule, you need to first select the “Differential” rule by clicking on it as shown below



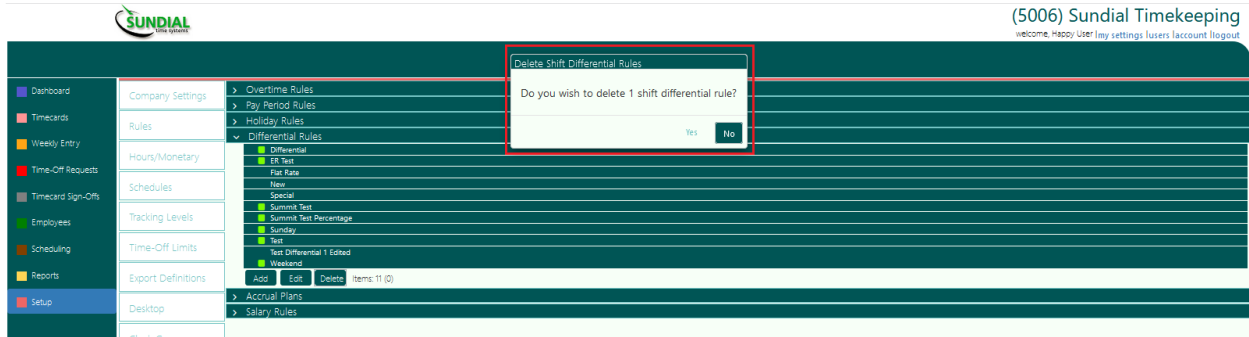
Once you click on a Differential Rule the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



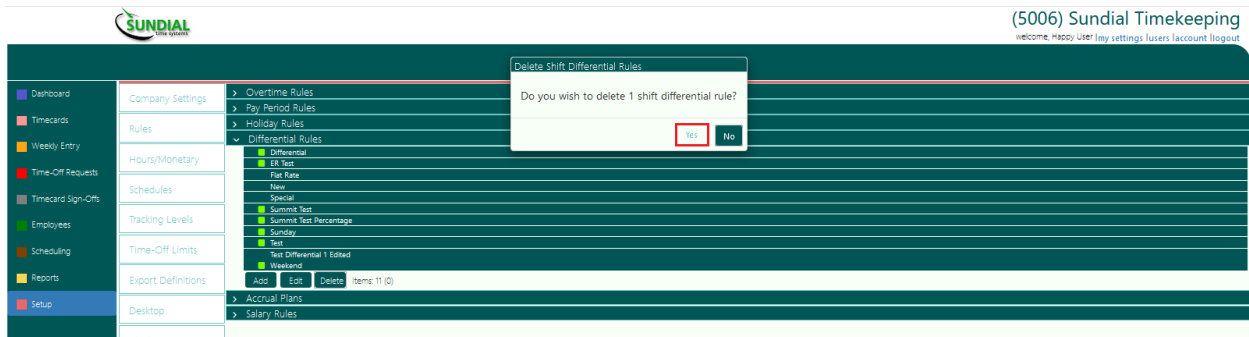
Once selected, you can click on the “Delete” button as shown below



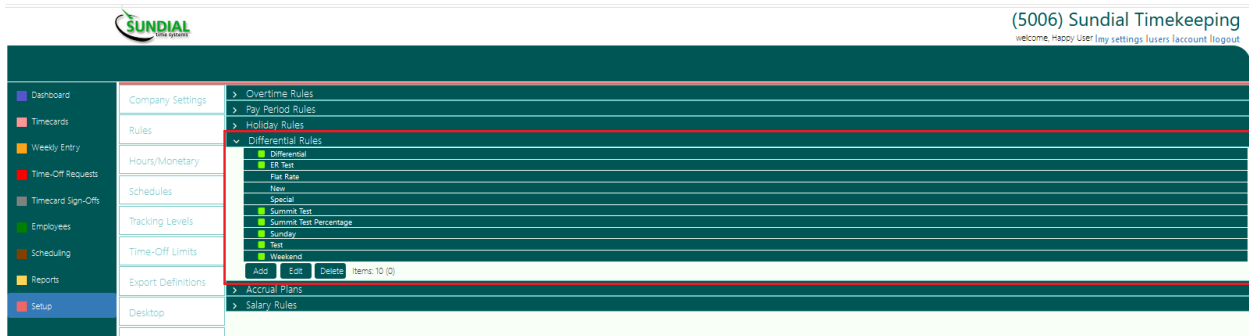
Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click “Ok” on this pop-up/overlay as shown below

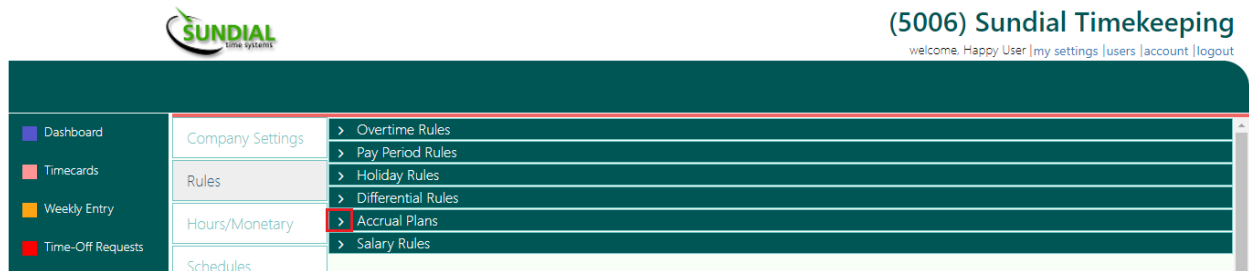


Once you click “Ok” the system will then delete the selected rule as shown below



Going into Accrual Plans

In order to go in the “Accrual Plans” you need to click on the “Right Pointed” arrow head as shown below



Once you click on this arrow the system will expand “Accrual Plan” section as shown below

Accrual Plan Name	Accruals
1 Year Employee	3
25 Days	1
days	1
Employee PTO Plan	1
Office	4
PLI Hourly	1
Points Acquired	1
Post-2011 Vac/Sick	2
Pre-2011 Vac/Sick	2
Priority Rule	2
Residential Hourly	2
Residential Salary	2
Sick leave	1
Stat Accrual	1
Test	1
Test PTO and Worked Day	1
TheNewGuy	2

System will display any pre-configured rules under this section. In addition to this you will see 3 buttons as listed below

- **[Button] Add** : Using this button, you can “Add” any new Accrual Plan to the system
- **[Button] Edit** : Using this button, you can “Edit” any existing Accrual Plan
- **[Button] Delete** : Using this button, you can “Delete” any existing Accrual Plan

Adding “Accrual Plans ”

In-order to add “Accrual Plan” you need to click on the “Add” button as shown below

Once you click on the “Add” button, system will display “Accrual Plan” page as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

New Accrual Plan creating accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs

General

Name

Start Of Year

Month

Day

Hours to Accrue	Anniversary	Rules
-----------------	-------------	-------

Add **Edit** **Delete** Items: 0 (0) **Save** **Cancel**

Understanding the “Accrual Plan” Page

Name : Using this field, you can define the name of the “Accrual Group” for the “Accrual Plan” that you set up

Start of Year

[Dropdown]Month : Using this field, you can choose the start month for the accrual group you set up

[Dropdown]Day : Using this field, you can choose the start day of the month for the accrual group you set up

Once you provide a name, you’re ready to add some **Accruals** by clicking on the “Add” button as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

New Accrual Plan creating accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

General

Name

Start Of Year

Month

Day

Hours to Accrue	Anniversary	Rules
-----------------	-------------	-------

Add **Edit** **Delete** Items: 0 (0) **Save** **Cancel**

Once you click on “Add” system will display a pop-up/overlay as shown below

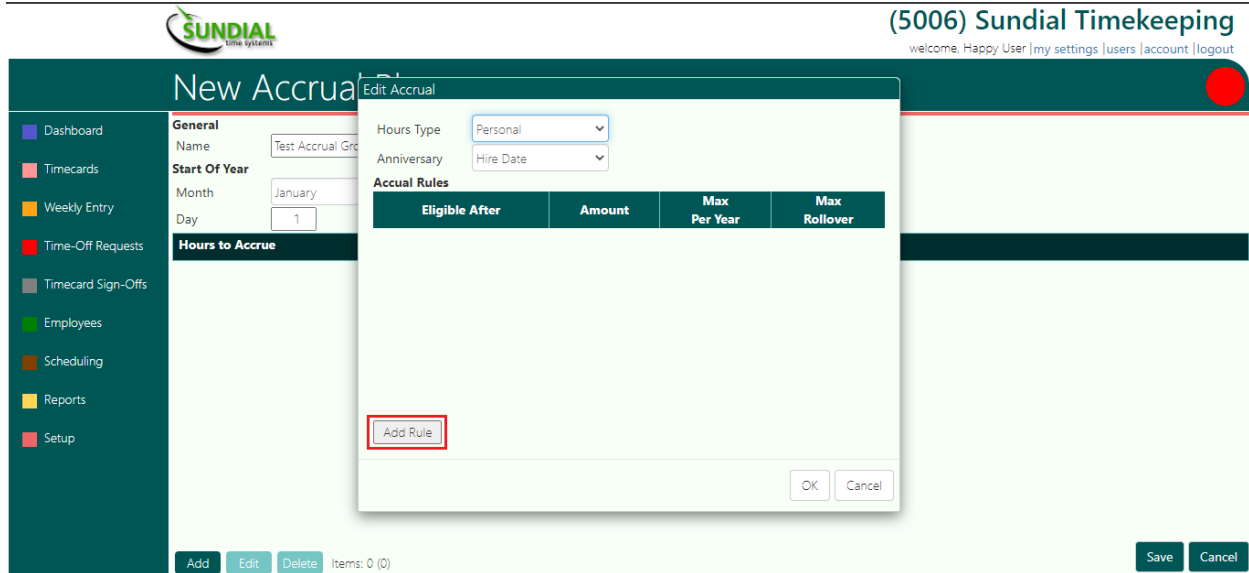
The screenshot shows the SUNDIAL Timekeeping interface. The main page is titled "New Accrual" and features a sidebar with navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area contains a form for creating a new accrual plan. The form includes fields for Name, Start Of Year (Month and Day), Hours Type, and Anniversary. A table for "Accrual Rules" is visible, with columns for Eligible After, Amount, Max Per Year, and Max Rollover. A red box highlights a pop-up window titled "Edit Accrual" that is overlaid on the main form. This pop-up contains the same form fields as the main page, but with a red border. At the bottom of the pop-up, there are "Add Rule", "OK", and "Cancel" buttons. The main page also has "Add", "Edit", and "Delete" buttons at the bottom left, and "Save" and "Cancel" buttons at the bottom right.

Understanding the “Accrual” - pop-up/overlay

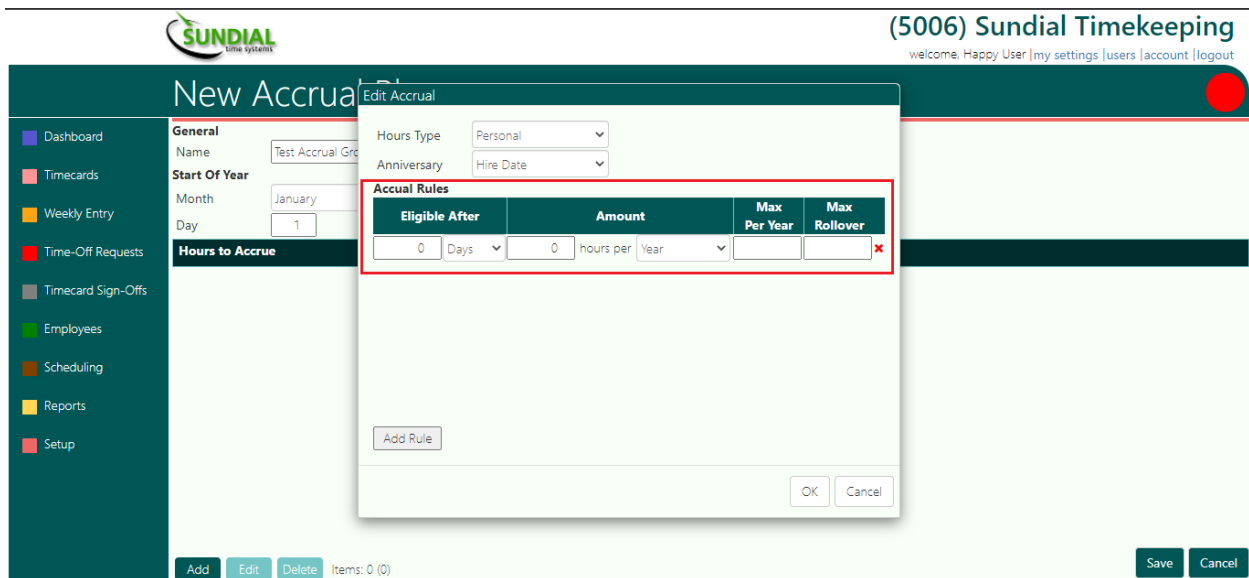
[Dropdown] Hours Type : Select the type of the hours for this accrual (i.e. Vacation, Personal, etc. These will vary based on your organizational configurations)

[Dropdown] Anniversary Value : Choose the “Anniversary” from “Hire Date” or “Start of Year”. Hire Date means that the rule conditions calculate from the employee’s Date of Hire. Start of Year means that the rule conditions calculate based on the Start of Year specified in the plan.

Once the selections are made, you need to click on the “Add Rule” button as shown below



Once the “Add Rule” button is clicked system will display the other options in order for you to define the values as shown below



Understanding the additional inputs

“Eligible After” section

These two fields work together to indicate when this rule is effective. It is based on the Employee’s Hire Date, even if your Accrual cycle is Start of Year

[Text field] : Enter the numeric value of Days, Months or Years after Hire Date that this rule takes effect.

[Dropdown] Eligible after : Select from “Day”, “Month” or “Year” to define when this rule takes effect.

“Amount” section

These two fields work together to determine the amount and frequency that hours are earned.

[Text field] : Enter a numeric value of Hours earned each {accrual period}

[Dropdown] : Select the frequency that the Hours are earned.

NOTE: For frequencies that are greater than one day (pay period, month, year), the earning is applied on the first day of the period. For a weekly frequency, select the day of the week you wish the earning to be applied.

Max Per Year : Specify the Maximum number of hours that can be earned in the Accrual Year. Leave Blank for no limit.

Max Rollover : Specify the Maximum number of hours that can be carried forward to the next Accrual Year. Leave Blank for no limit.

Repeat:

Add as many rules as needed for your Accrual. Often the first rule will apply 0 days after hire date, then the next rule is 1 year, then 2 years, then 5 years, etc. Each rule can have it’s own earning amount, earning frequency

Example:

The view below shows accruing Personal time, beginning after 180 days of employment, accruing 2 hours per Month, with a Maximum Accrual of 24 total hours and a Maximum Rollover amount of 1 hour.

(5006) Sundial Timekeeping
welcome: Happy User | my settings | users | account | logout

New Accrual

General
Name: Test Accrual Gr
Start Of Year
Month: January
Day: 1

Hours to Accrue

Eligible After	Amount	Max Per Year	Max Rollover
180 Days	2 hours per Month	24	1

Add Rule

OK Cancel

Add Edit Delete Items: 0 (0) Save Cancel

After this, you need to click on the “OK” button as shown below

(5006) Sundial Timekeeping
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New Accrual

General

Name: Test Accrual Group

Start Of Year

Month: January

Day: 1

Hours Type: Personal

Anniversary: Hire Date

Accrual Rules

Eligible After	Amount	Max Per Year	Max Rollover
180 Days	2 hours per Month	24	1

Add Rule

OK Cancel

Add Edit Delete Items: 0 (0) Save Cancel

Once you click on the “OK” button, the accrual rule will be added as shown below

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New Accrual Plan

creating accrual plan

General

Name: Test Accrual Group

Start Of Year

Month: January

Day: 1

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1

Save Cancel

Once this is added, you need to click on the “Save” button for the system to save the changes done

New Accrual Plan creating accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

General

Name:

Start Of Year

Month:

Day:

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1

Items: 1 (0)

Editing “Accrual”

In order to “Edit” a Accrual Rule, you need to first select the “Accrual rule” by clicking on it as shown below

General

Name:

Start Of Year

Month:

Day:

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1

Once you click on an Accrual Rule the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Test Accrual Group edit accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees

General

Name:

Start Of Year

Month:

Day:

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1
Vacation	Hire Date	2

Now you need to click on the **“Edit”** button as shown below



Test Accrual Group edit accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

General

Name:

Start Of Year

Month:

Day:

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1
Vacation	Hire Date	2

Items: 2 (1)

Once the **“Edit”** button is clicked the system will load the Accrual Rule in an editable mode as shown below.

SUNDIAL time systems (5006) Sundial Timekeeping
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Test Accrual

Edit Accrual

Hours Type: Personal
Anniversary: Hire Date

Start Of Year
Month: January
Day: 1

Hours to Accrue
Personal
Vacation

Eligible After	Amount	Max Per Year	Max Rollover
180 Days	2 hours per Month	24	1

Add Rule

OK Cancel

Add Edit Delete Items: 2 (1) Save Cancel

You will now be able to make any changes to existing Accrual Rule values.

Once you make the changes, you need to click on the “OK” button in order for the system to save the changes

SUNDIAL time systems (5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Test Accrual

Edit Accrual

Hours Type: Personal
Anniversary: Hire Date

Start Of Year
Month: January
Day: 1

Hours to Accrue
Personal
Vacation

Eligible After	Amount	Max Per Year	Max Rollover
180 Days	2 hours per Month	24	1

Add Rule

OK Cancel

Add Edit Delete Items: 2 (1) Save Cancel

Once you do this, you need to click on the “Save” button as shown below

The screenshot shows the Sundial Timekeeping interface for editing an accrual plan. The page title is "Test Accrual Group" with a sub-link "edit accrual plan". The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is divided into "General" and "Rules" sections. The "General" section includes fields for Name (Test Accrual Group), Start Of Year (Month: January, Day: 1). The "Rules" section contains a table with columns "Hours to Accrue", "Anniversary", and "Rules".

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1
Vacation	Hire Date	2

At the bottom of the page, there are buttons for "Add", "Edit", "Delete", and "Items: 2 (1)". The "Save" button is highlighted with a red box.

Deleting “Accrual”

Deleting an Accrual will delete all the accrual rules contained within. In order to “Delete” an Accrual, you need to first select the “Accrual” by clicking on it as shown below

This screenshot is identical to the previous one, but the "Vacation" row in the "Rules" table is highlighted with a lighter background, indicating it is selected. The "Save" button is no longer highlighted.

Once you click on a **Accrual**, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Test Accrual Group edit accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees

General

Name:

Start Of Year

Month:

Day:

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1
Vacation	Hire Date	2

Once selected, you can click on the **“Delete”** button as shown below



Test Accrual Group edit accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

General

Name:

Start Of Year

Month:

Day:

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1
Vacation	Hire Date	2

Items: 2 (1)

Once you click on **“Delete”** the system will delete the Accrual. Once it's deleted you need to click on the **“Save”** button as shown below

Test Accrual Group edit accrual plan

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

General

Name:

Start Of Year

Month:

Day:

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1

items: 1 (0)

Editing “Accrual Group”

In order to “Edit” an Accrual Group, you need to first select the “Accrual Group” by clicking on it as shown below

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

Company Settings

- Rules
 - Overtime Rules
 - Pay Period Rules
 - Holiday Rules
 - Differential Rules
 - Accrual Plans
 - 1 Year Employee Accruals: 3
 - 25 Days days Accruals: 1
 - Employee PTO Plan Accruals: 1
 - Office Accruals: 4
 - PIJ Hourly Accruals: 1
 - Points Acquired Accruals: 1
 - Post-2011 Vac/Sick Accruals: 2
 - Pre-2011 Vac/Sick Accruals: 2
 - Priority Rule Accruals: 2
 - Residential Hourly Accruals: 2
 - Residential Salary Accruals: 2
 - Sick leave Accruals: 1
 - Stat Accrual Accruals: 1
 - Test Accruals: 1
 - Test Accrual Group Accruals: 1
 - Test PTO and Worked Day Accruals: 1
 - TheNewGuy Accruals: 2

- Hours/Monetary
- Schedules
- Tracking Levels
- Time-Off Limits
- Export Definitions
- Desktop
- Clock Groups
- Clock Identities
- Punch Cycles

items: 18 (0)

Once you click on a **Accrual Group**, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

The screenshot shows the 'Setup' section of the Sundial Timekeeping application. The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup (highlighted). The main content area is divided into three columns: 'Company Settings', 'Rules', and 'Accrual Plans'. Under 'Accrual Plans', a list of plans is displayed with columns for name and 'Accruals'. The 'Test Accrual Group' row is highlighted with a red border. Below the list are 'Add', 'Edit', and 'Delete' buttons, and a note '(Items: 18 (1))'. Other menu items include Overtime Rules, Pay Period Rules, Holiday Rules, Differential Rules, Salary Rules, Hours/Monetary, Schedules, Tracking Levels, Time-Off Limits, Export Definitions, Desktop, Clock Groups, Clock Identities, and Punch Cycles.

Plan Name	Accruals
1 Year Employee	3
25 Days	1
days	1
Employee PTO Plan	1
Office	4
PLI Hourly	1
Points Acquired	1
Post-2011 Vac/Sick	2
Pre-2011 Vac/Sick	2
Priority Rule	2
Residential Hourly	2
Residential Salary	2
Sick leave	1
Stat Accrual	1
Test	1
Test Accrual Group	1
Test PTO and Worked Day	1
TheNewGuy	2

Now you need to click on the “Edit” button as shown below

This screenshot is identical to the one above, but with the 'Edit' button in the bottom action bar highlighted with a red border, indicating the next step in the process.

Once the “Edit” button is clicked the system will load the Accrual Group in an editable mode as shown below.

The screenshot shows the Sundial Timekeeping interface. The header includes the Sundial logo and the text "(5006) Sundial Timekeeping" with a user welcome message. The main content area is titled "Test Accrual Group" and includes a sub-header "edit accrual plan". A sidebar on the left lists navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main form contains a "General" section with fields for Name (Test Accrual Group), Start Of Year (Month: January, Day: 1), and a table with columns "Hours to Accrue", "Anniversary", and "Rules". The table has one row: Personal, Hire Date, 1. At the bottom, there are buttons for "Add", "Edit", "Delete", and "Cancel". The "Edit" button is highlighted with a red box.

You will now be able to make any changes to existing rule values.

Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below

This screenshot is identical to the one above, showing the "Test Accrual Group" in edit mode. The "Save" button, which is a small white button with a grey border, is highlighted with a red box. The "Edit" button is no longer highlighted.

Once you make any changes the system will enable the “Save” button as shown below.

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Test Accrual Group edit accrual plan

General
Name: Test Accrual Group Edited

Start Of Year
Month: January
Day: 1

Hours to Accrue	Anniversary	Rules
Personal	Hire Date	1

Add Edit Delete Items: 1 (0)

Save Cancel

Once you click on the “Save” button the system will save any changes done as shown below

(5006) Sundial Timekeeping
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Company Settings > Overtime Rules
Rules > Pay Period Rules
Hours/Monetary > Holiday Rules
Schedules > Differential Rules
Tracking Levels > Accrual Plans

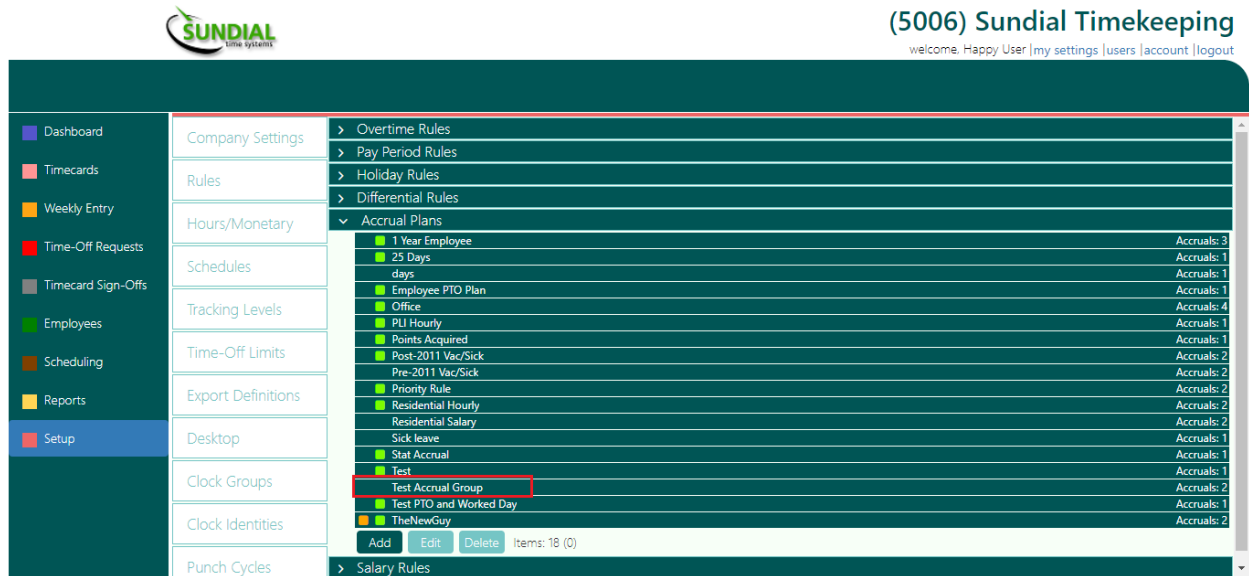
1 Year Employee	Accruals: 3
25 Days days	Accruals: 1
Employee PTO Plan	Accruals: 1
Office	Accruals: 4
PLI Hourly	Accruals: 1
Points Acquired	Accruals: 1
Post-2011 Vac/Sick	Accruals: 2
Pre-2011 Vac/Sick	Accruals: 2
Priority Rule	Accruals: 2
Residential Hourly	Accruals: 2
Residential Salary	Accruals: 2
Sick leave	Accruals: 1
Stat Accrual	Accruals: 1
Test	Accruals: 1
Test Accrual Group Edited	Accruals: 1
Test PTO and Worked Day	Accruals: 1
TheNewGuy	Accruals: 2

Add Edit Delete Items: 18 (0)

> Salary Rules

Deleting "Accrual Groups"

In order to "Delete" a Accrual Group, you need to first select the "Accrual Group" by clicking on it as shown below

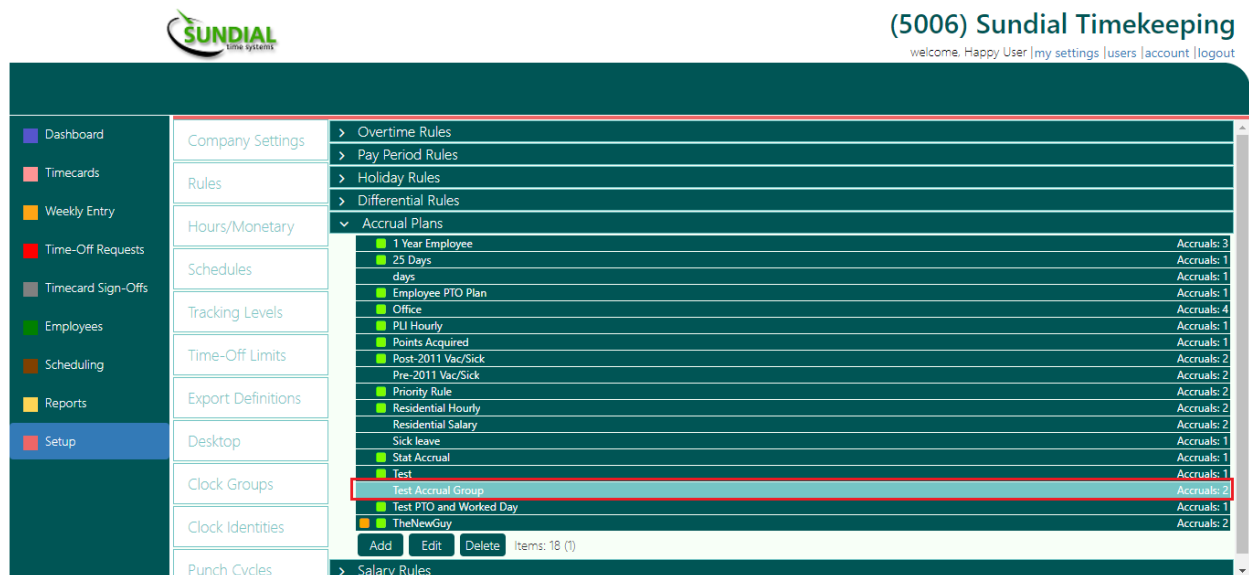


(5006) Sundial Timekeeping
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The screenshot shows the SUNDIAL Timekeeping interface. On the left is a navigation menu with 'Setup' selected. The main content area shows a tree view of settings, with 'Accrual Plans' expanded. A list of accrual plans is displayed, with 'Test Accrual Group' highlighted in a lighter shade. Below the list are 'Add', 'Edit', and 'Delete' buttons, and a status indicator 'Items: 18 (0)'.

Accrual Plan	Accruals
1 Year Employee	3
25 Days days	1
Employee PTO Plan	1
Office	4
PLI Hourly	1
Points Acquired	1
Post-2011 Vac/Sick	2
Pre-2011 Vac/Sick	2
Priority Rule	2
Residential Hourly	2
Residential Salary	2
Sick leave	1
Stat Accrual	1
Test	1
Test Accrual Group	2
Test PTO and Worked Day	1
TheNewGuy	2

Once you click on a Accrual Group the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



(5006) Sundial Timekeeping
welcome: Happy User | my settings | users | account | logout

The screenshot shows the SUNDIAL Timekeeping interface. On the left is a navigation menu with 'Setup' selected. The main content area shows a tree view of settings, with 'Accrual Plans' expanded. A list of accrual plans is displayed, with 'Test Accrual Group' highlighted in a lighter shade. Below the list are 'Add', 'Edit', and 'Delete' buttons, and a status indicator 'Items: 18 (1)'.

Accrual Plan	Accruals
1 Year Employee	3
25 Days days	1
Employee PTO Plan	1
Office	4
PLI Hourly	1
Points Acquired	1
Post-2011 Vac/Sick	2
Pre-2011 Vac/Sick	2
Priority Rule	2
Residential Hourly	2
Residential Salary	2
Sick leave	1
Stat Accrual	1
Test	1
Test Accrual Group	2
Test PTO and Worked Day	1
TheNewGuy	2

Once selected, you can click on the “Delete” button as shown below

The screenshot shows the Sundial Timekeeping interface. The top header includes the Sundial logo and the text "(5006) Sundial Timekeeping" with a user welcome message. A left sidebar contains navigation options like Dashboard, Timecards, and Setup. The main content area is divided into sections: Company Settings, Rules, Hours/Monetary, Schedules, Tracking Levels, Time-Off Limits, Export Definitions, Desktop, Clock Groups, Clock Identities, and Punch Cycles. The "Accrual Plans" section is expanded, showing a list of plans with columns for name, status, and accruals. The "Delete" button at the bottom of the list is highlighted with a red box.

Plan Name	Accruals
1 Year Employee	3
25 Days days	1
Employee PTO Plan	1
Office	4
PLI Hourly	1
Points Acquired	1
Post-2011 Vac/Sick	2
Pre-2011 Vac/Sick	2
Priority Rule	2
Residential Hourly	2
Residential Salary	2
Sick leave	1
Stat Accrual	1
Test	1
Test Accrual Group	2
Test PTO and Worked Day	1
TheNewGuy	2

Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below

The screenshot shows the same Sundial Timekeeping interface as above, but with a confirmation dialog box overlaid. The dialog box is titled "Delete Accrual Plans" and contains the text "Do you wish to delete 1 accrual plan?". It has two buttons: "Yes" and "No". The "Delete" button in the list below is still highlighted with a red box.

Plan Name	Accruals
1 Year Employee	3
25 Days days	1
Employee PTO Plan	1
Office	4
PLI Hourly	1
Points Acquired	1
Post-2011 Vac/Sick	2
Pre-2011 Vac/Sick	2
Priority Rule	2
Residential Hourly	2
Residential Salary	2
Sick leave	1
Stat Accrual	1
Test	1
Test Accrual Group	2
Test PTO and Worked Day	1
TheNewGuy	2

In order to delete, you need to click "OK" on this pop-up/overlay as shown below

(5006) Sundial Timekeeping
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SUNDIAL time systems

Dashboard
Timecards
Weekly Entry
Time-Off Requests
Timecard Sign-Offs
Employees
Scheduling
Reports
Setup

Company Settings
Rules
Hours/Monetary
Schedules
Tracking Levels
Time-Off Limits
Export Definitions
Desktop
Clock Groups
Clock Identities
Punch Cycles

> Overtime Rules
> Pay Period Rules
> Holiday Rules
> Differential Rules
▼ Accrual Plans
1 Year Employee Accruals: 3
25 Days days Accruals: 1
Employee PTO Plan Accruals: 1
Office Accruals: 4
PLI Hourly Accruals: 1
Points Acquired Accruals: 1
Post-2011 Vac/Sick Accruals: 2
Pre-2011 Vac/Sick Accruals: 2
Priority Rule Accruals: 2
Residential Hourly Accruals: 2
Residential Salary Accruals: 2
Sick leave Accruals: 1
Stat Accrual Accruals: 1
Test Accruals: 1
Test Accrual Group Accruals: 1
Test PTO and Worked Day Accruals: 1
TheNewGuy Accruals: 2

Do you wish to delete 1 accrual plan?
Yes No

Add Edit Delete Items: 18 (0)

> Salary Rules

Once you click "OK" the system will then delete the selected rule as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

SUNDIAL time systems

Dashboard
Timecards
Weekly Entry
Time-Off Requests
Timecard Sign-Offs
Employees
Scheduling
Reports
Setup

Company Settings
Rules
Hours/Monetary
Schedules
Tracking Levels
Time-Off Limits
Export Definitions
Desktop
Clock Groups
Clock Identities
Punch Cycles

> Overtime Rules
> Pay Period Rules
> Holiday Rules
> Differential Rules
▼ Accrual Plans
1 Year Employee Accruals: 3
25 Days days Accruals: 1
Employee PTO Plan Accruals: 1
Office Accruals: 4
PLI Hourly Accruals: 1
Points Acquired Accruals: 1
Post-2011 Vac/Sick Accruals: 2
Pre-2011 Vac/Sick Accruals: 2
Priority Rule Accruals: 2
Residential Hourly Accruals: 2
Residential Salary Accruals: 2
Sick leave Accruals: 1
Stat Accrual Accruals: 1
Test Accruals: 1
Test Accrual Group Accruals: 1
Test PTO and Worked Day Accruals: 1
TheNewGuy Accruals: 2

Add Edit Delete Items: 17 (0)

> Salary Rules

Going into Salary Rules

In order to go in the “Salary Rules” you need to click on the “Right Pointed” arrow head as shown below



Once you click on this arrow the system will expand “Salary Rules” section as shown below



System will display any pre-configured rules under this section.

In addition to this you will see 3 buttons as listed below

- **[Button] Add** : Using this button, you can “Add” any new Salary Rule to the system
- **[Button] Edit** : Using this button, you can “Edit” any existing Salary Rule
- **[Button] Delete** : Using this button, you can “Delete” any existing Salary Rule

Once you click on the “Add” button, system will display “Salary Rule” page as shown below

Understanding the “Salary Rule” Page

Name : Using this field, you can define the name of the “Salary Rule” you set up

[Checkboxes] Affecting hours : Using these checkboxes, you can define the PTO (Paid Time Off) types that affect salary amounts.

- For any checkbox item that is **not checked**, employees will **get paid** for these Hours types in addition to their salary
- For any checkbox item that is **checked**, employees would **get paid** for these Hours types, but their salary will be **reduced** accordingly

By default, all items will be checked and you can choose to untick based on your organizational configurations

New Salary Rule creating salary rule

Name:

Affecting Hours

Vacation	<input type="checkbox"/>
Sick	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Holiday	<input type="checkbox"/>
Bereavement	<input checked="" type="checkbox"/>
Jury Duty	<input checked="" type="checkbox"/>
Custom7	<input checked="" type="checkbox"/>
Custom8	<input checked="" type="checkbox"/>
Custom9	<input checked="" type="checkbox"/>
Worked - Sunday	<input checked="" type="checkbox"/>
Level 11	<input checked="" type="checkbox"/>
Vacation x	<input checked="" type="checkbox"/>
Biweekly Staff	<input checked="" type="checkbox"/>
Regular	<input checked="" type="checkbox"/>

Once the necessary selections are made, you can click on the "Save" button as shown below in order for the system to save the changes

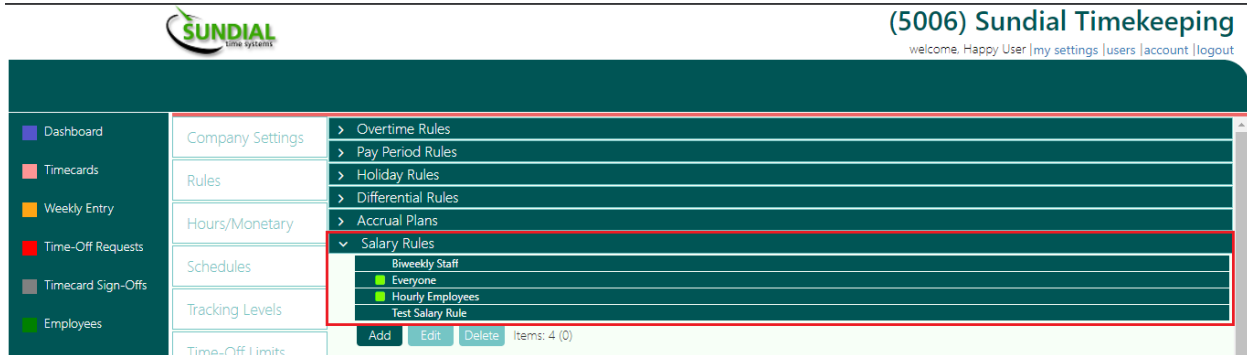
New Salary Rule creating salary rule

Name:

Affecting Hours

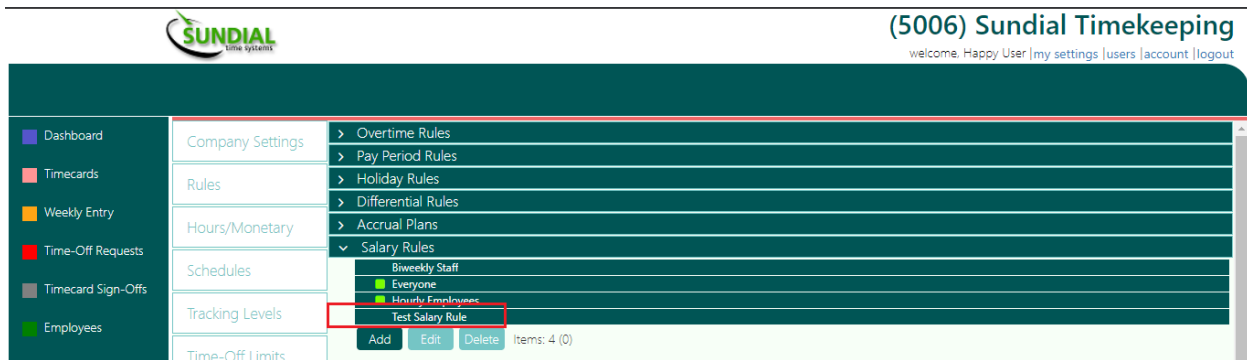
Vacation	<input type="checkbox"/>
Sick	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Holiday	<input type="checkbox"/>
Bereavement	<input checked="" type="checkbox"/>
Jury Duty	<input checked="" type="checkbox"/>
Custom7	<input checked="" type="checkbox"/>
Custom8	<input checked="" type="checkbox"/>
Custom9	<input checked="" type="checkbox"/>
Worked - Sunday	<input checked="" type="checkbox"/>
Level 11	<input checked="" type="checkbox"/>
Vacation x	<input checked="" type="checkbox"/>
Biweekly Staff	<input checked="" type="checkbox"/>
Regular	<input checked="" type="checkbox"/>

Once the Salary Rule is saved, system will display the saved Salary Rule as shown below

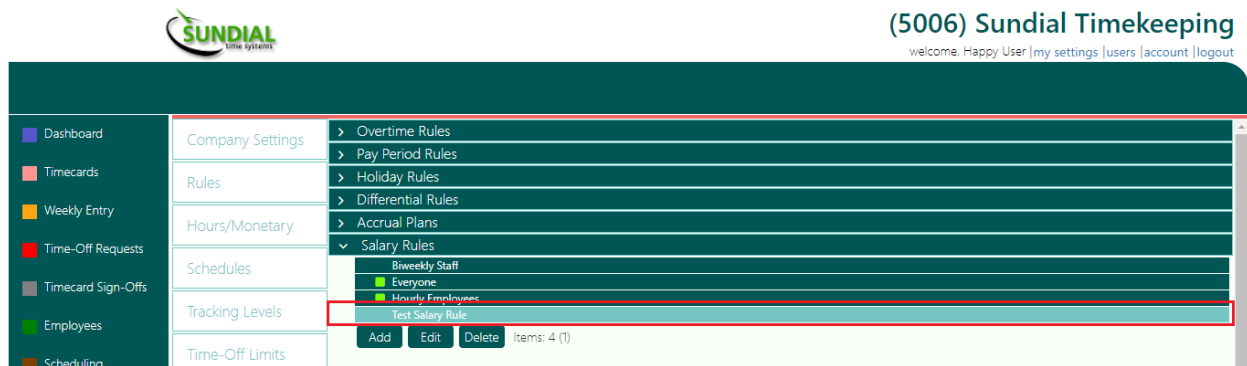


Editing "Salary Rule"

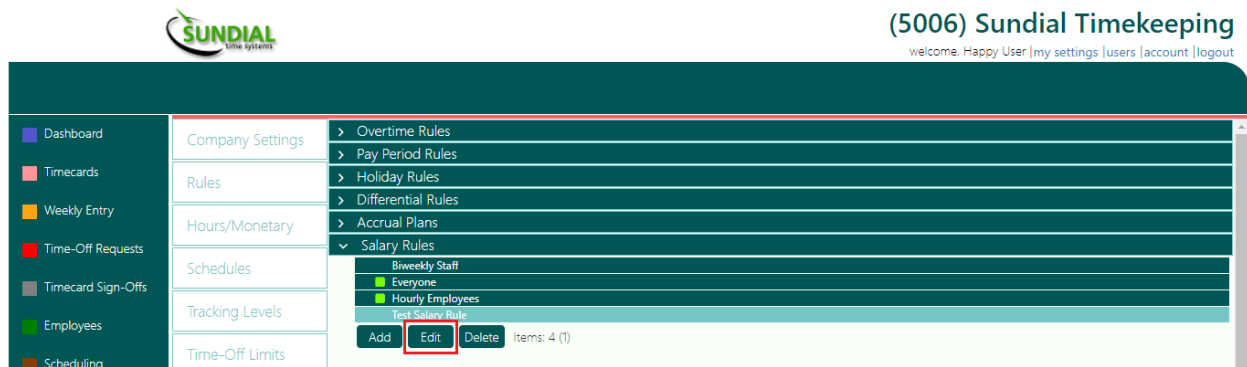
In order to "Edit" an Salary Rule, you need to first select the "Salary Rule" by clicking on it as shown below



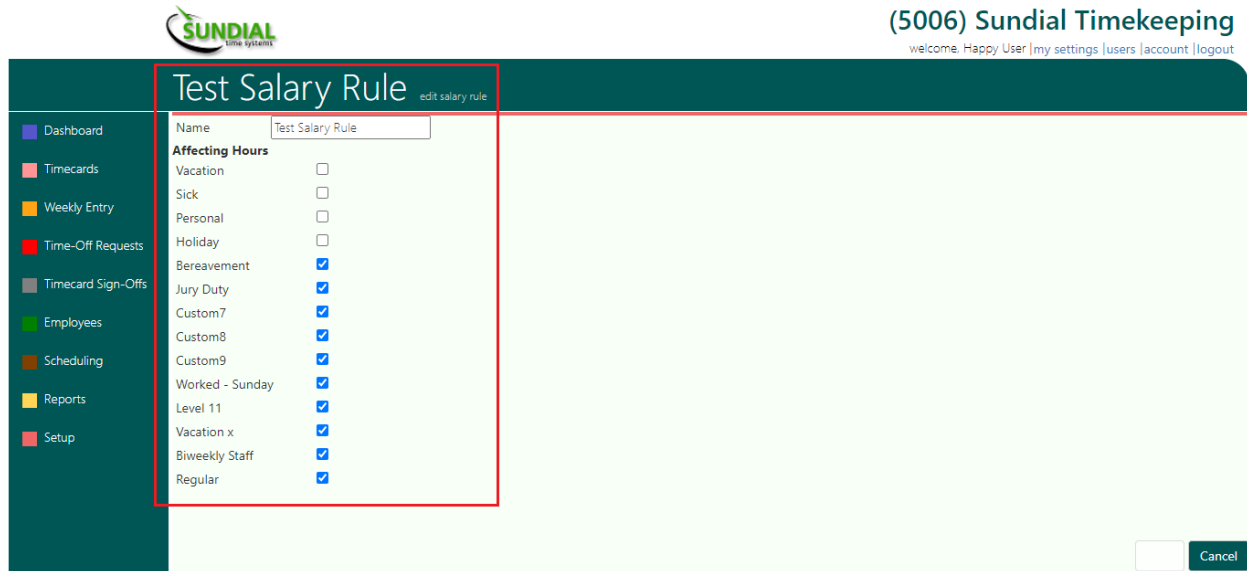
Once you click on a **Salary Rule**, the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Now you need to click on the “Edit” button as shown below



Once the “Edit” button is clicked the system will load the Salary Rule in an editable mode as shown below.



You will now be able to make any changes to existing rule values.

Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below

Test Salary Rule edit salary rule

Name	<input type="text" value="Test Salary Rule"/>
Affecting Hours	
Vacation	<input type="checkbox"/>
Sick	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Holiday	<input type="checkbox"/>
Bereavement	<input checked="" type="checkbox"/>
Jury Duty	<input checked="" type="checkbox"/>
Custom7	<input checked="" type="checkbox"/>
Custom8	<input checked="" type="checkbox"/>
Custom9	<input checked="" type="checkbox"/>
Worked - Sunday	<input checked="" type="checkbox"/>
Level 11	<input checked="" type="checkbox"/>
Vacation x	<input checked="" type="checkbox"/>
Biweekly Staff	<input checked="" type="checkbox"/>
Regular	<input checked="" type="checkbox"/>

Once you make any changes the system will enable the “Save” button as shown below.

Test Salary Rule edit salary rule

Name	<input type="text" value="Test Salary Rule"/>
Affecting Hours	
Vacation	<input type="checkbox"/>
Sick	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Holiday	<input type="checkbox"/>
Bereavement	<input checked="" type="checkbox"/>
Jury Duty	<input checked="" type="checkbox"/>
Custom7	<input checked="" type="checkbox"/>
Custom8	<input checked="" type="checkbox"/>
Custom9	<input checked="" type="checkbox"/>
Worked - Sunday	<input checked="" type="checkbox"/>
Level 11	<input checked="" type="checkbox"/>
Vacation x	<input checked="" type="checkbox"/>
Biweekly Staff	<input checked="" type="checkbox"/>
Regular	<input checked="" type="checkbox"/>

Once you click on the “Save” button the system will save any changes done as shown below



The screenshot shows the 'Salary Rules' section of the Sundial Timekeeping interface. The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, and Employees. The main content area is divided into a left column with menu items (Company Settings, Rules, Hours/Monetary, Schedules, Tracking Levels, Time-Off Limits) and a right column with a list of rules. The 'Salary Rules' section is expanded, showing a list of rules: Biweekly Staff, Everyone, Hourly Employees, and Test Salary Rule Edited. The 'Test Salary Rule Edited' item is highlighted with a red box. Below the list are 'Add', 'Edit', and 'Delete' buttons, and a status indicator 'Items: 4 (0)'.

Deleting "Salary Rules"

In order to "Delete" a Salary Rule, you need to first select the "Salary Rule" by clicking on it as shown below



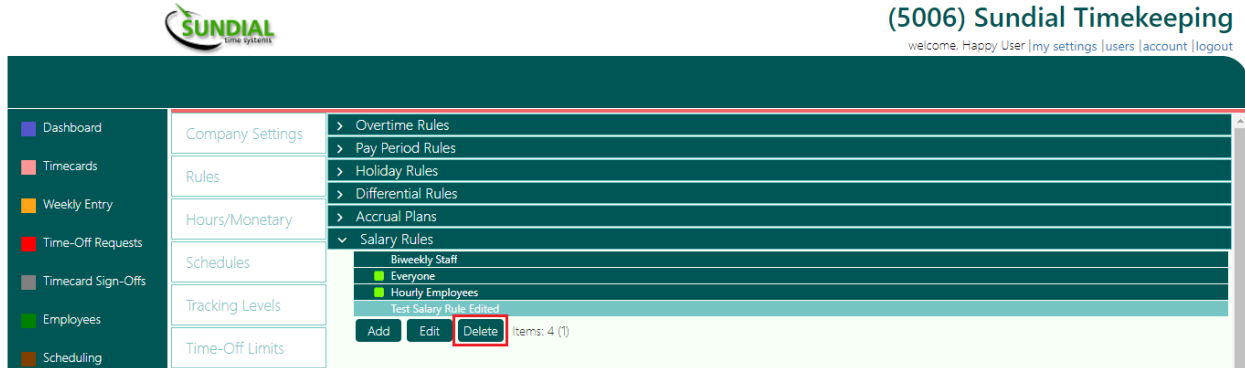
The screenshot shows the 'Salary Rules' section of the Sundial Timekeeping interface. The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, and Employees. The main content area is divided into a left column with menu items (Company Settings, Rules, Hours/Monetary, Schedules, Tracking Levels, Time-Off Limits) and a right column with a list of rules. The 'Salary Rules' section is expanded, showing a list of rules: Biweekly Staff, Everyone, Hourly Employees, and Test Salary Rule Edited. The 'Test Salary Rule Edited' item is highlighted with a red box. Below the list are 'Add', 'Edit', and 'Delete' buttons, and a status indicator 'Items: 4 (0)'.

Once you click on a Salary Rule the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

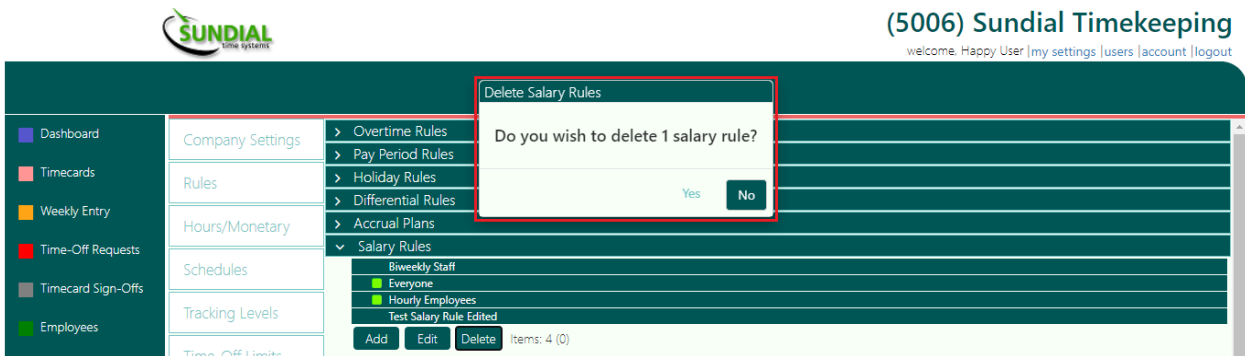


The screenshot shows the 'Salary Rules' section of the Sundial Timekeeping interface. The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, and Scheduling. The main content area is divided into a left column with menu items (Company Settings, Rules, Hours/Monetary, Schedules, Tracking Levels, Time-Off Limits) and a right column with a list of rules. The 'Salary Rules' section is expanded, showing a list of rules: Biweekly Staff, Everyone, Hourly Employees, and Test Salary Rule Edited. The 'Test Salary Rule Edited' item is highlighted with a red box. Below the list are 'Add', 'Edit', and 'Delete' buttons, and a status indicator 'Items: 4 (1)'.

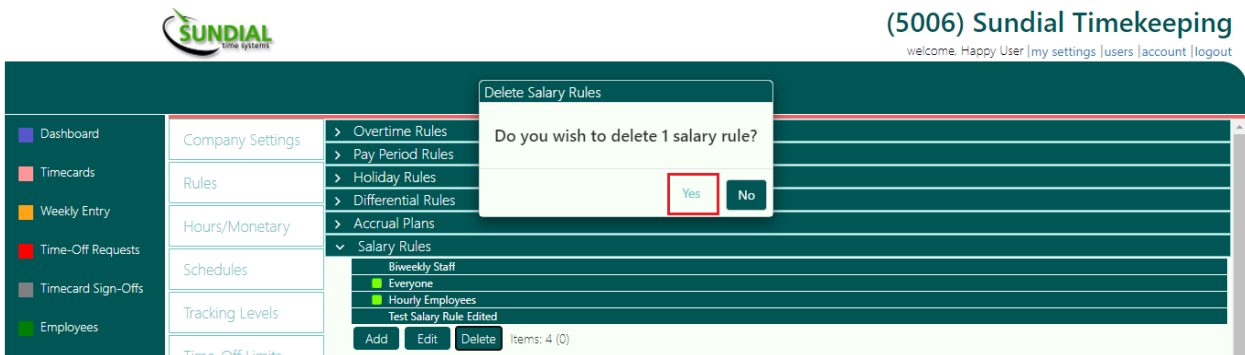
Once selected, you can click on the “Delete” button as shown below



Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click “OK” on this pop-up/overlay as shown below



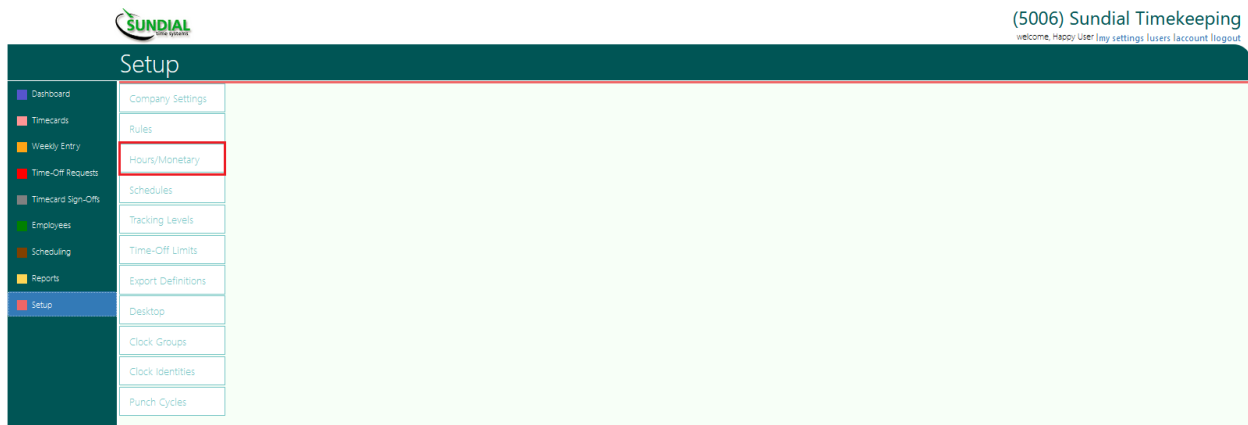
Once you click “Ok” the system will then delete the selected rule as shown below



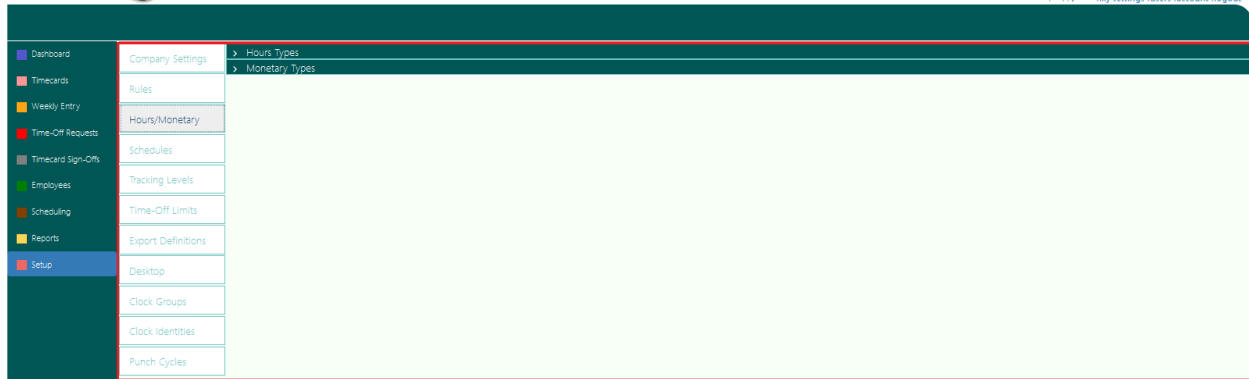
5.11.5. Hours/Monetary

Going into “Hours/Monetary”

In order to get in to the “Hours/Monetary” you need to click on “Hours/Monetary” under the “Setup” section as shown below



Once you click on “Hours/Monetary” section, you will be navigated in to the “Hours/Monetary” page as shown below



Understanding the “Hours/Monetary”

Hours/Monetary area has settings pertinent to the below mentioned areas

Hours Types : This section contains the Hours types that are generally used. (i.e. Vacation, Sick, Personal, Holiday etc.)

[Button] Add : Using this button, you can add a new Hours Type to the system

[Button] Edit : Using this you can edit an existing Hours Type that is present in the system

Monetary Types : This section contains the Monetary Types that are generally used (Tips, Advance, Commission, Bonus etc.)

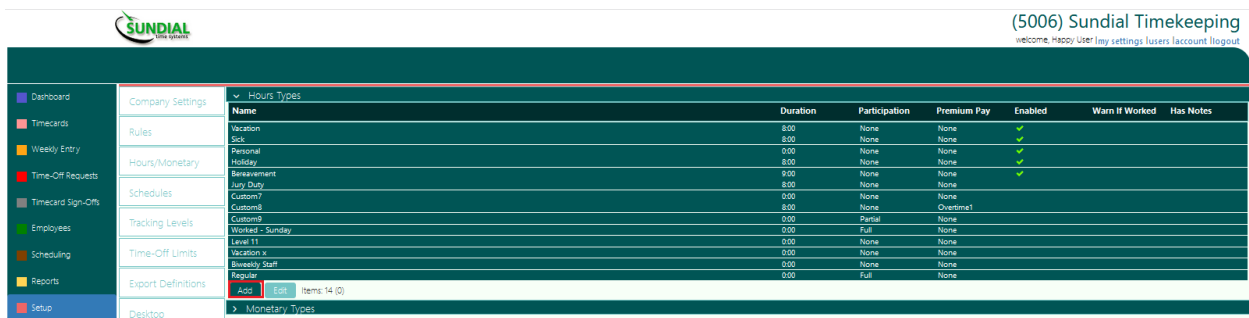
[Button] Add : Using this button, you can add a new Monetary Type to the system

[Button] Edit : Using this you can edit an existing Monetary Type that is present in the system

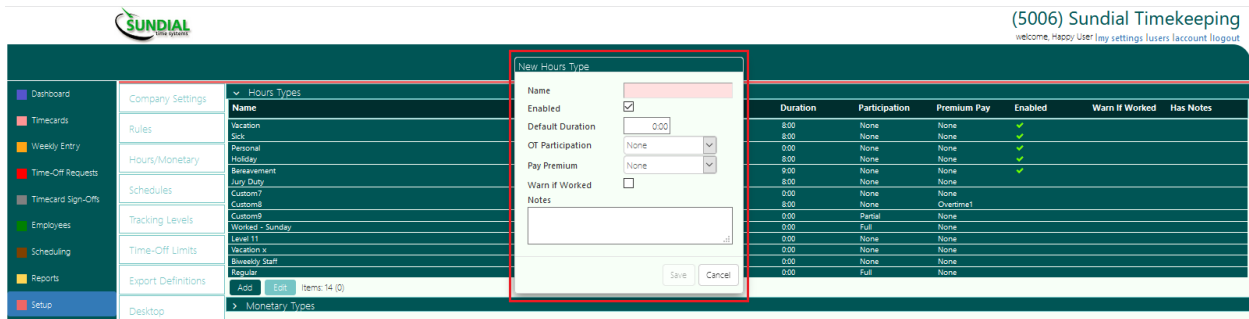
Adding “Hours Types”

NOTE: Because Hours Types cannot be deleted once created, we recommend editing the initial list and only adding additional types if you determine that you need them.

In order to add a new hours type, you need to click on the “Add” button as shown below



When you click on “Add” system will display a Pop-up/overlay as shown below



Understanding the “Add Hours Pop-up/overlay”

Name : Using this field, you can provide the name for the “Hours Type” that needs to be added

[Checkbox] Enabled : Using this checkbox, you can either enable/disable the configured “Hours Type” If you check this checkbox, it will enable the “Hours Type” and vice versa

Default Duration : Using this field, you can set up the default duration for the “Hours Type” that you define

[Dropdown]OT Participation : Using this dropdown, you can define the OT participation relevant to the defined “Hours Type”

- Partial : Specifying Partial tells the system to allow these hours to accrue toward meeting the Overtime threshold, but these hours will never be elevated to Overtime.
- Full : Specifying Full tells the system to allow these hours to accrue toward meeting the Overtime threshold AND these hours can be elevated to Overtime

Pay Premium : Using this dropdown, you can define if these “Hour Types” are associated with any premium payments. They can be explicitly set to Overtime 1 (1.5 pay rate), Overtime 2 (double time pay rate) or Additional.

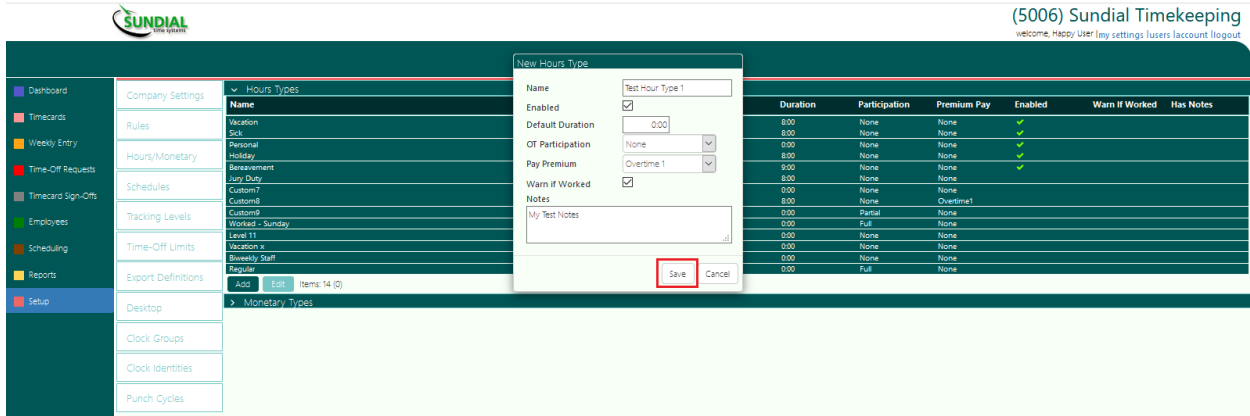
Example:

If you need to explicitly create some hours as Overtime, even if the threshold hasn’t been met, you can specify it here and use the Hours type when needed. This can be especially helpful in dealing with Retro-Pay.

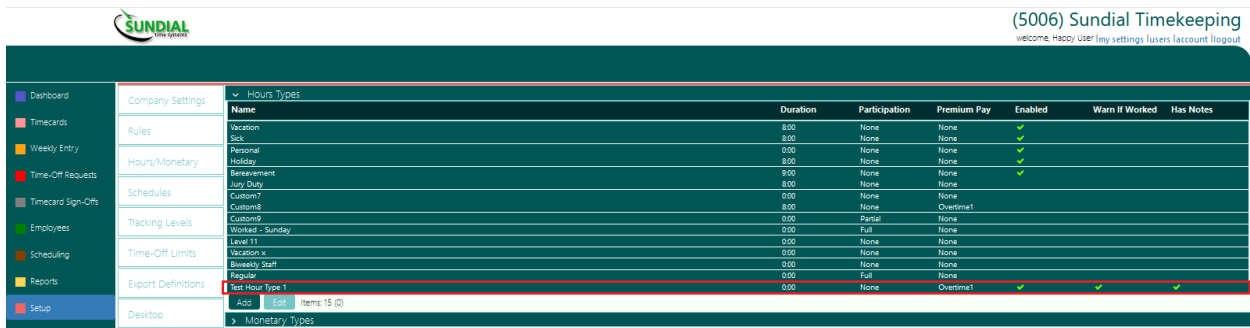
[Checkbox] Warn if Worked : Using this checkbox, you can either enable/disable the warning if an employee clocks in when such “Hours Type” is already in active or in progress. (i.e. If someone has applied “Vacation” PTO and clocks during that period, system would display a warning)

Notes : Using this field, you can add any notes relevant to the “Hours Type” that is added

Once the relevant information is added, you can click on the “Save” button as shown below

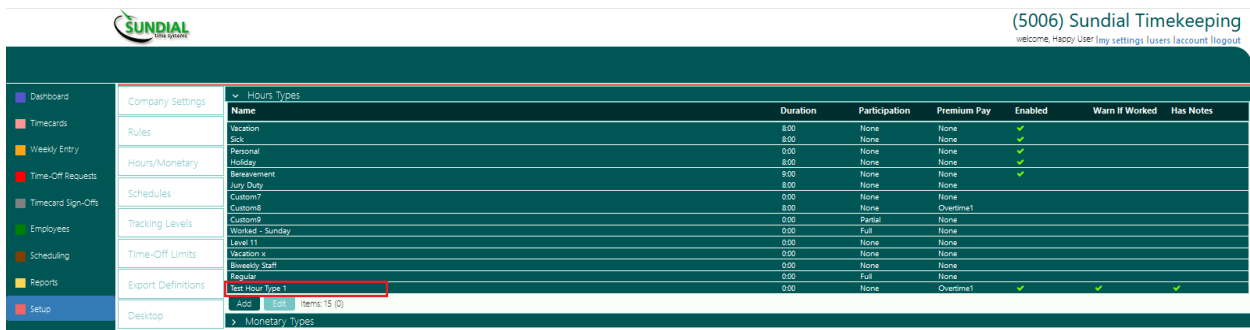


Once you click on “Save” system will save the added record as shown below



Editing “Hours Types”

In order to **edit** a record, you need to first **select** the record by clicking on it as shown below.



When clicked the selected line items will be shaded with a lighter complexion to help you differentiate it from the rest

Company Settings							
Hours Types							
Name	Duration	Participation	Premium Pay	Enabled	Warn If Worked	Has Notes	
Vacation	8:00	None	None	<input checked="" type="checkbox"/>			
Sick	8:00	None	None	<input checked="" type="checkbox"/>			
Personal	8:00	None	None	<input checked="" type="checkbox"/>			
Holiday	8:00	None	None	<input checked="" type="checkbox"/>			
Bereavement	8:00	None	None	<input checked="" type="checkbox"/>			
Jury Duty	8:00	None	None	<input checked="" type="checkbox"/>			
Custom7	8:00	None	None	<input checked="" type="checkbox"/>			
Custom8	8:00	None	Overtime1	<input checked="" type="checkbox"/>			
Custom9	0:00	Partial	None	<input checked="" type="checkbox"/>			
Worked - Sunday	0:00	Full	None	<input checked="" type="checkbox"/>			
Level 11	0:00	None	None	<input checked="" type="checkbox"/>			
Vacation x	0:00	None	None	<input checked="" type="checkbox"/>			
Biweekly Staff	0:00	None	None	<input checked="" type="checkbox"/>			
Regular	8:00	Full	None	<input checked="" type="checkbox"/>			
Test Hour Type 1	8:00	None	Overtime1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="button" value="Add"/> <input type="button" value="Edit"/> Items: 15 (1)							
<input type="button" value="Monetary Types"/>							

Once this is selected, you need to click on the **“Edit”** button as shown below

Company Settings							
Hours Types							
Name	Duration	Participation	Premium Pay	Enabled	Warn If Worked	Has Notes	
Vacation	8:00	None	None	<input checked="" type="checkbox"/>			
Sick	8:00	None	None	<input checked="" type="checkbox"/>			
Personal	8:00	None	None	<input checked="" type="checkbox"/>			
Holiday	8:00	None	None	<input checked="" type="checkbox"/>			
Bereavement	8:00	None	None	<input checked="" type="checkbox"/>			
Jury Duty	8:00	None	None	<input checked="" type="checkbox"/>			
Custom7	8:00	None	None	<input checked="" type="checkbox"/>			
Custom8	8:00	None	Overtime1	<input checked="" type="checkbox"/>			
Custom9	0:00	Partial	None	<input checked="" type="checkbox"/>			
Worked - Sunday	0:00	Full	None	<input checked="" type="checkbox"/>			
Level 11	0:00	None	None	<input checked="" type="checkbox"/>			
Vacation x	0:00	None	None	<input checked="" type="checkbox"/>			
Biweekly Staff	0:00	None	None	<input checked="" type="checkbox"/>			
Regular	8:00	Full	None	<input checked="" type="checkbox"/>			
Test Hour Type 1	8:00	None	Overtime1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="button" value="Add"/> <input type="button" value="Edit"/> Items: 15 (1)							
<input type="button" value="Monetary Types"/>							

When you click on the **“Edit”** button, system will display a pop-up/overlay as shown below

Company Settings							
Hours Types							
Name	Duration	Participation	Premium Pay	Enabled	Warn If Worked	Has Notes	
Vacation	8:00	None	None	<input checked="" type="checkbox"/>			
Sick	8:00	None	None	<input checked="" type="checkbox"/>			
Personal	8:00	None	None	<input checked="" type="checkbox"/>			
Holiday	8:00	None	None	<input checked="" type="checkbox"/>			
Bereavement	8:00	None	None	<input checked="" type="checkbox"/>			
Jury Duty	8:00	None	None	<input checked="" type="checkbox"/>			
Custom7	8:00	None	None	<input checked="" type="checkbox"/>			
Custom8	8:00	None	Overtime1	<input checked="" type="checkbox"/>			
Custom9	0:00	Partial	None	<input checked="" type="checkbox"/>			
Worked - Sunday	0:00	Full	None	<input checked="" type="checkbox"/>			
Level 11	0:00	None	None	<input checked="" type="checkbox"/>			
Vacation x	0:00	None	None	<input checked="" type="checkbox"/>			
Biweekly Staff	0:00	None	None	<input checked="" type="checkbox"/>			
Regular	8:00	Full	None	<input checked="" type="checkbox"/>			
Test Hour Type 1	8:00	None	Overtime1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="button" value="Add"/> <input type="button" value="Edit"/> Items: 15 (1)							
<input type="button" value="Monetary Types"/>							

Test Hour Type 1

Name:

Enabled:

Default Duration:

OF Participation:

Pay Premium:

Warn If Worked:

Notes:

Note : **“Save”** button will be in a disabled state until such time the value shown is changed. Only once you make a change the **“Save”** button will be enabled

Once you “Edit”, you can click on the “Save” button to save it as shown below

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The screenshot shows the 'Test Hour Type 1' dialog box with the following fields:

- Name: Test Hour Type 1 Edited
- Enabled:
- Default Duration: 000
- OT Participation: None
- Pay Premium: Overtime 1
- Warn if Worked:
- Notes: My Test Notes

The 'Save' button is highlighted with a red box. The background table shows the following data:

Name	Duration	Participation	Premium Pay	Enabled	Warn if Worked	Has Notes
Vacation	800	None	None	✓		
Sick	800	None	None	✓		
Personal	000	None	None	✓		
Holiday	800	None	None	✓		
Reassignment	800	None	None	✓		
Jury Duty	800	None	None			
Custom7	000	None	None			
Custom8	800	None	Overtime1			
Custom9	000	Partial	None			
Worked - Sunday	000	Full	None			
Level 11	000	None	None			
Vacation x	000	None	None			
Biweekly Staff	000	None	None			
Regular	000	Full	None			
Test Hour Type 1	000	Full	None			
Test Hour Type 1 Edited	000	None	Overtime1	✓	✓	✓

Once you click on the “Save” button, system will save the changes and it will be displayed as shown below

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The screenshot shows the 'Test Hour Type 1 Edited' entry in the table, indicating that the changes have been saved. The 'Save' button in the dialog box from the previous screenshot is now highlighted in red in the table row.

Name	Duration	Participation	Premium Pay	Enabled	Warn if Worked	Has Notes
Vacation	800	None	None	✓		
Sick	800	None	None	✓		
Personal	000	None	None	✓		
Holiday	800	None	None	✓		
Reassignment	800	None	None	✓		
Jury Duty	800	None	None			
Custom7	000	None	None			
Custom8	800	None	Overtime1			
Custom9	000	Partial	None			
Worked - Sunday	000	Full	None			
Level 11	000	None	None			
Vacation x	000	None	None			
Biweekly Staff	000	None	None			
Regular	000	Full	None			
Test Hour Type 1 Edited	000	None	Overtime1	✓	✓	✓

Adding “Monetary Types”

NOTE: Because Monetary Types cannot be deleted once created, we recommend editing the initial list and only adding additional types if you determine that you need them

In order to add a new hours type, you need to click on the “Add” button as shown below

The screenshot shows the Sundial Timekeeping interface. On the left is a navigation menu with options like Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main area displays 'Company Settings' > 'Hours Types' > 'Monetary Types'. A table lists existing monetary types with columns for Name, Amount, Enabled, Is Deduction, and Has Notes. At the bottom of the table, there are 'Add' and 'Edit' buttons, with 'Add' highlighted by a red box. The top right corner shows '(5006) Sundial Timekeeping' and a user welcome message.

When you click on “Add” system will display a Pop-up/overlay as shown below

This screenshot shows the same interface as above, but with a 'New Monetary Type' pop-up overlay. The pop-up contains the following fields: 'Name' (text input), 'Enabled' (checkbox), 'Default Amount' (text input with '0.00'), 'Alternate Source' (dropdown menu), 'Is Deduction' (checkbox), and 'Notes' (text area). 'Save' and 'Cancel' buttons are at the bottom. The background table and navigation menu are visible but dimmed.

Understanding the “Add Monetary Type Pop-up/overlay”

Name : Using this field, you can provide the name for the “Monetary Type” that needs to be added

[Checkbox] Enabled : Using this checkbox, you can either enable/disable the configured “Monetary Type” If you check this checkbox, it will enable the “Monetary Type” and vice versa

Default Value : Used for setting a default value for the Monetary Type

[Dropdown] Alternative Source : Using this dropdown, you can instruct the system to obtain it’s Default Value from an Employee Custom Property. When an Alternative Source is specified, AND a value exists in the Alternative Source field of the employee, it will override the Default Value specified above.

Example:

Suppose you usually need a default value of \$10, but the default for some employees should be \$15. Set up a Custom Employee Property (Company Settings) and specify it here. Set the Default Value to \$10, then specify the \$15 value for each of the employees that need it by putting 15 in the correct “User Defined Property” of their employee record.

[Checkbox] Is Deduction : Using this checkbox, you can choose whether or not this “Monetary Type” is a deduction or not. If this checkbox is checked, it will consider this to be a deduction and vice versa

Notes : Using this field, you can add any notes relevant to the “Monetary Type” that is added

Once the relevant information is added, you can click on the “Save” button as shown below

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Name	Amount	Enabled	Is Deduction	Has Notes
Tips	\$0.00	✓		
Advance	\$0.00	✓		
Commission	\$0.00	✓	✓	
Bonus	\$0.00	✓		
Meals	\$0.00	✓	✓	
Mileage	\$0.00	✓		
Reimbursements	\$0.00	✓		
Load	\$0.00	✓		
Uniform	\$0.00	✓		
Tip	\$0.00	✓		
Hourly rates	\$0.00	✓		
Mealing Bonus	\$0.00	✓		
Piecework	\$0.00	✓		
Sales Bonus	\$0.00	✓		
New Type	\$0.00			

Once you click on “Save” system will save the added record as shown below

(5006) Sundial Timekeeping
welcome, H300 User | my settings | users | account | logout

Name	Amount	Enabled	Is Deduction	Has Notes
Tips	\$0.00	✓		
Advance	\$0.00	✓		
Commission	\$0.00	✓	✓	
Bonus	\$0.00	✓		
Meals	\$0.00	✓	✓	
Mileage	\$0.00	✓		
Reimbursements	\$0.00	✓		
Load	\$0.00	✓		
Uniform	\$0.00	✓		
Tip	\$0.00	✓		
Hourly rates	\$0.00	✓		
Mealing Bonus	\$0.00	✓		
Piecework	\$0.00	✓		
Sales Bonus	\$0.00	✓		
New Type	\$0.00			
New Test Monetary Type	\$0.00	✓		✓

Editing "Monetary Types"

In order to **edit** a record, you need to first **select** the record by clicking on it as shown below.



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Dashboard | Company Settings | Hours Types | Monetary Types

Name	Amount	Enabled	Is Deduction	Has Notes
Tips	\$0.00	✓		
Advance	\$0.00	✓	✓	
Commission	\$0.00	✓		
Bonus	\$0.00	✓		
Meal	\$0.00	✓	✓	
Mileage	\$0.00	✓		
Reimbursements	\$0.00			
Load	\$0.00			
Uniform	\$0.00			
Tips	\$0.00			
Hourly rates	\$0.00			
Traveling Bonus	\$0.00			
Piecework	\$0.00			
Sales Bonus	\$0.00			
New Type	\$0.00			
New Test Monetary Type	\$0.00	✓		✓

Add Edit Items: 16 (0)

When clicked the selected line items will be shaded with a lighter complexion to help you differentiate it from the rest



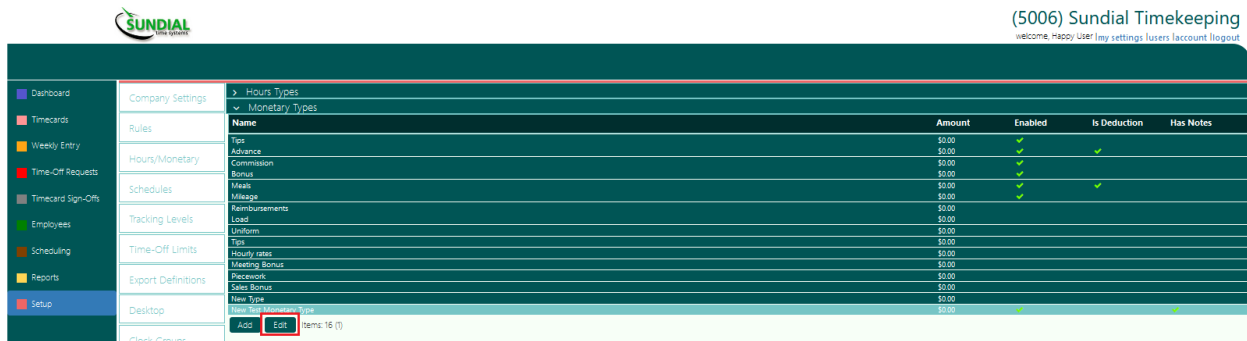
(5006) Sundial Timekeeping
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Dashboard | Company Settings | Hours Types | Monetary Types

Name	Amount	Enabled	Is Deduction	Has Notes
Tips	\$0.00	✓		
Advance	\$0.00	✓	✓	
Commission	\$0.00	✓		
Bonus	\$0.00	✓		
Meal	\$0.00	✓	✓	
Mileage	\$0.00	✓		
Reimbursements	\$0.00			
Load	\$0.00			
Uniform	\$0.00			
Tips	\$0.00			
Hourly rates	\$0.00			
Traveling Bonus	\$0.00			
Piecework	\$0.00			
Sales Bonus	\$0.00			
New Type	\$0.00			
New Test Monetary Type	\$0.00	✓		✓

Add Edit Items: 16 (1)

Once this is selected, you need to click on the "Edit" button as shown below



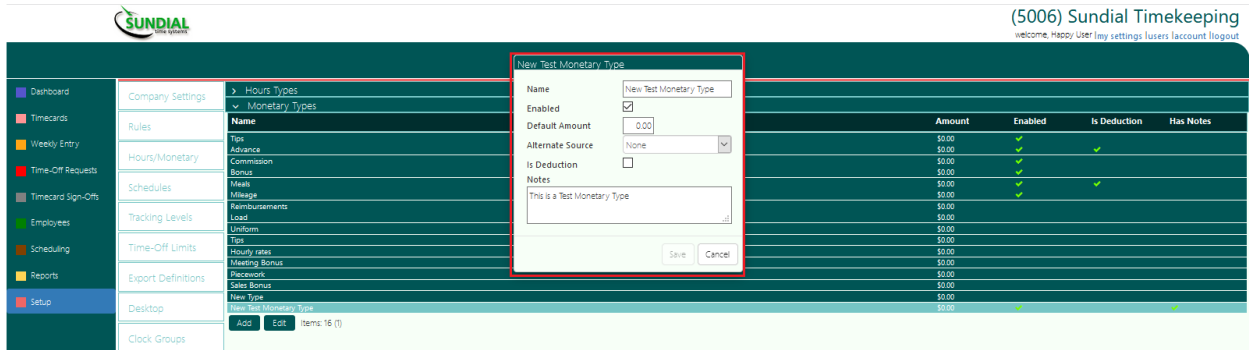
(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Dashboard | Company Settings | Hours Types | Monetary Types

Name	Amount	Enabled	Is Deduction	Has Notes
Tips	\$0.00	✓		
Advance	\$0.00	✓	✓	
Commission	\$0.00	✓		
Bonus	\$0.00	✓		
Meal	\$0.00	✓	✓	
Mileage	\$0.00	✓		
Reimbursements	\$0.00			
Load	\$0.00			
Uniform	\$0.00			
Tips	\$0.00			
Hourly rates	\$0.00			
Traveling Bonus	\$0.00			
Piecework	\$0.00			
Sales Bonus	\$0.00			
New Type	\$0.00			
New Test Monetary Type	\$0.00	✓		✓

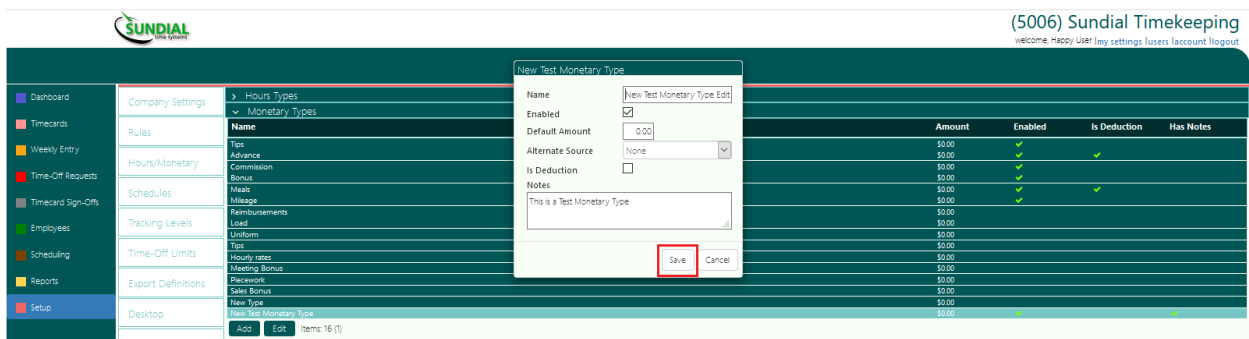
Add Edit Items: 16 (1)

When you click on the **“Edit”** button, system will display a pop-up/overlay as shown below

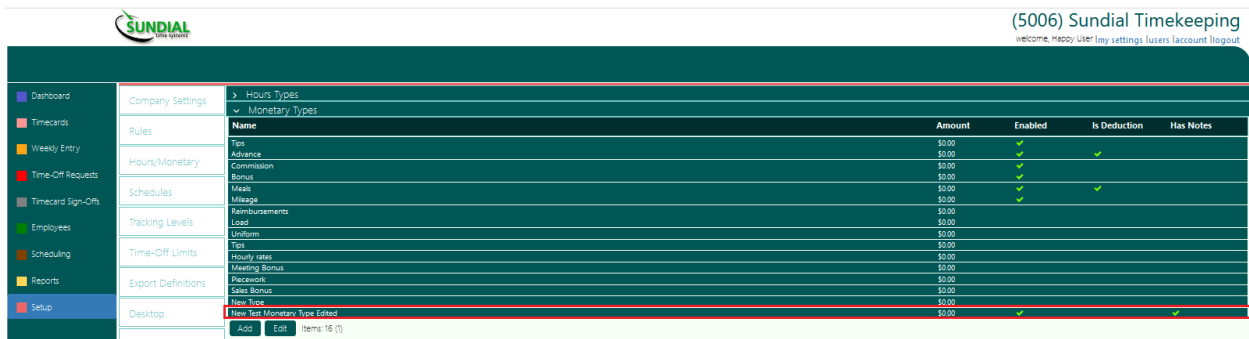


Note : **“Save”** button will be in a disabled state until such time the value shown is changed. Only once you make a change the **“Save”** button will be enabled

Once you **“Edit”**, you can click on the **“Save”** button to save it as shown below



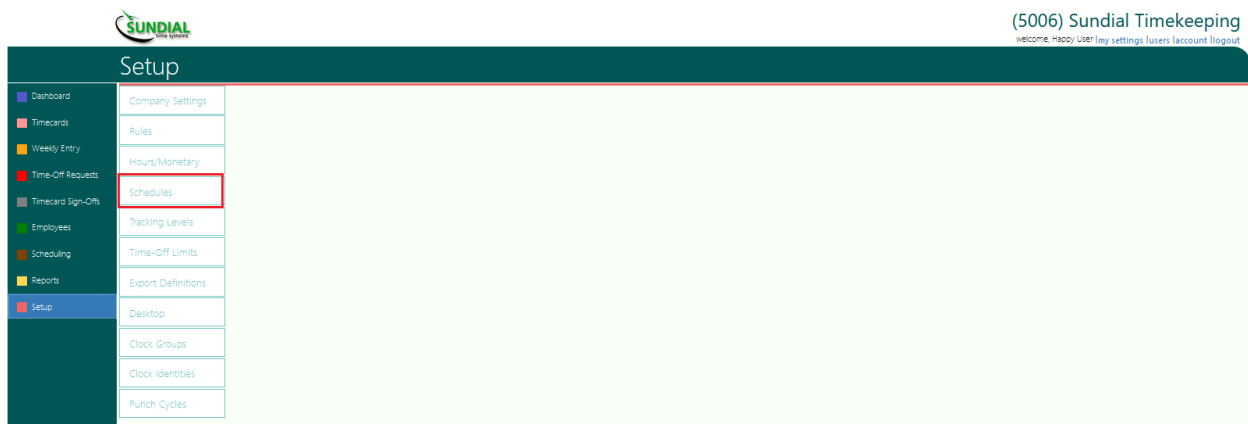
Once you click on the **“Save”** button, system will save the changes and it will be displayed as shown below



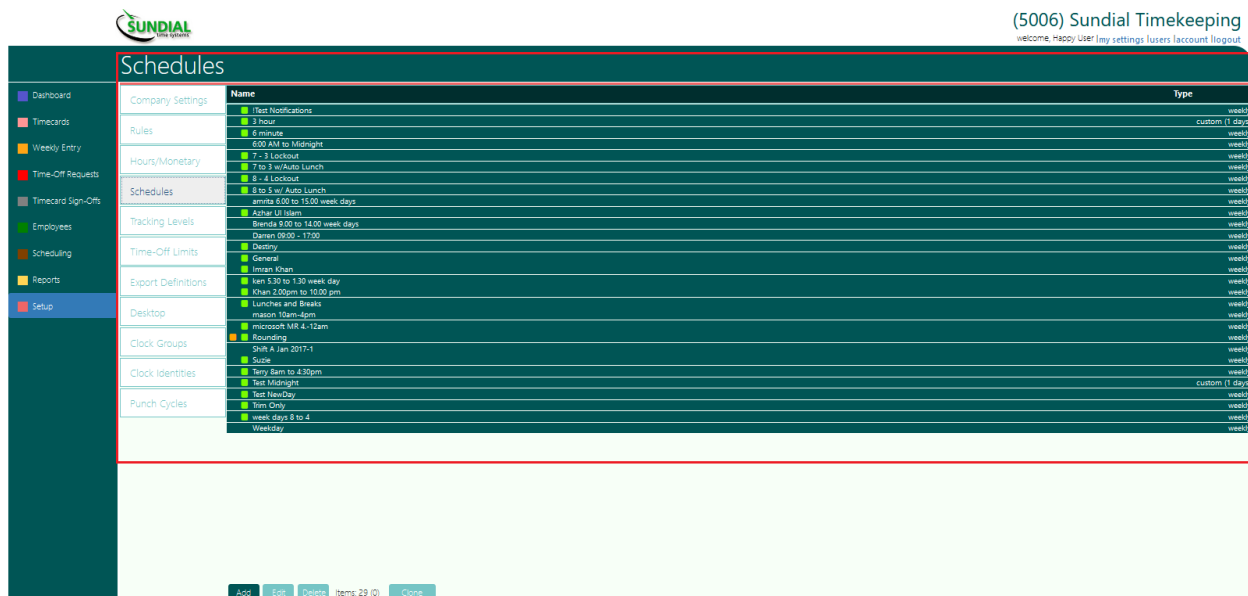
5.11.6. Schedules

Going into “Schedules”

In order to get in to the “Schedules ” you need to click on “Schedules” under the “Setup” section as shown below



Once you click on “Schedules” section, you will be navigated in to the “Schedules” page as shown below



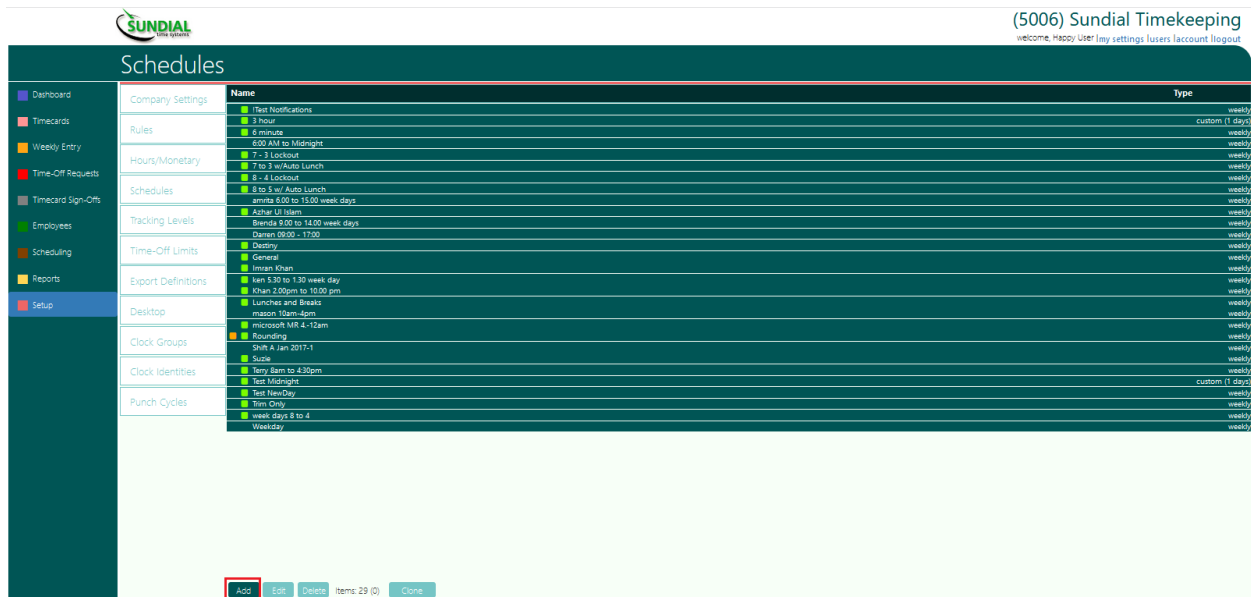
Understanding the “Schedules”

[Button] Add : Using this button, you can add a new Schedule to the system

[Button] Edit : Using this you can edit an existing Schedule that is present in the system

Adding “Schedules”

In order to add a new schedule, you need to click on the “**Add**” button as shown below



The screenshot displays the Sundial Timekeeping interface. The top right corner shows the user is logged in as (5006) Sundial Timekeeping. The main content area is titled "Schedules" and contains a table with the following columns: Name and Type. The table lists various schedules such as "Dien Notifications", "3 hour", "6 minute", "6:00 AM to Midnight", "7 - 3 Lockout", "7 to 3 w/Auto Lunch", "8 - 4 Lockout", "8 to 5 w/Auto Lunch", "amrita 6:00 to 10:00 week days", "Ashar UI 10am", "Brenda 9:00 to 14:00 week days", "Darrin 09:00 - 17:00", "Destiny", "General", "Imran Khan", "Ivan 5:30 to 1:30 week day", "Khan 2:00pm to 10:00 pm", "Lunches and Breaks", "mason 10am-4pm", "microsoft MR 4-12am", "Rounding", "9:00 A Jan 2015-1", "Suria", "Terry 8am to 4:30pm", "Test Midnight", "Test NewDay", "Tern Only", "week days 8 to 4", and "WeekDay". The "Add" button is highlighted with a red box at the bottom of the table.

Name	Type
Dien Notifications	weekly
3 hour	custom (1 days)
6 minute	weekly
6:00 AM to Midnight	weekly
7 - 3 Lockout	weekly
7 to 3 w/Auto Lunch	weekly
8 - 4 Lockout	weekly
8 to 5 w/Auto Lunch	weekly
amrita 6:00 to 10:00 week days	weekly
Ashar UI 10am	weekly
Brenda 9:00 to 14:00 week days	weekly
Darrin 09:00 - 17:00	weekly
Destiny	weekly
General	weekly
Imran Khan	weekly
Ivan 5:30 to 1:30 week day	weekly
Khan 2:00pm to 10:00 pm	weekly
Lunches and Breaks	weekly
mason 10am-4pm	weekly
microsoft MR 4-12am	weekly
Rounding	weekly
9:00 A Jan 2015-1	weekly
Suria	weekly
Terry 8am to 4:30pm	weekly
Test Midnight	custom (1 days)
Test NewDay	weekly
Tern Only	weekly
week days 8 to 4	weekly
WeekDay	weekly

When you click on “**Add**” system will display “**New Schedule**” screen as shown below

Understanding the “New Schedule” screen

General

Schedule Name : Using this field, you can add the name for the schedule you define

Schedule Type : Using this field, you can define the schedule type (i.e. if that is weekly, Bi weekly or custom)

Start of Week : Using this field, you can define the start day of the week for the schedule you define (i.e. you can choose any of the week from the dropdown)

Start of Day : Using this field, you can define the start time of a day (i.e. the first punch after this time of a day will be considered the first punch of a day. If this is defined as 8.00AM the first punch after 8.00AM will be considered as the employee’s first punch)

Rounding

This area allows

- Shift rounding uses Trim, Grace and Fallback rules to adjust timestamps to align with the employee's schedule
- General rounding does a simple "nearest" type of rounding in 5, 6, 10, 12, 15, 20 or 30 minute increments

Shift Rounding - Trim, Grace and Fallback.

- Trim ALWAYS means that the employee is On The Clock, but their time is not being counted.
- Grace ALWAYS means that the employee is Not On The Clock, but their time IS being counted.

- Fallback is the rule that is applied if Trim and Grace rules fail to apply

Shift

Shift Start

Trim : Using this field, you can define how the trimming of early clock in needs to be handled in the system in a shift start. (i.e if you define this as 0:25, when an employee clocks up to 25 minutes early to a shift that begins at 9.00 AM, system would still consider it to be a clock in done at 9.00 AM)

Grace : Using this field, you can define how the grace timing needs to be handled in the system for a delayed clock-in, in a shift start (i.e. if you define this as 0:05 if an employee clocks in up to 5 minutes late for their 09.00 AM shift, system would still consider it to be a clock in done at 09.00 AM)

Fallback : "Shift Start"."Fallback" applies if the employee punches Earlier than the Trim value or Later than the Grace value. This is a positive or negative value that tells the system to Adjust the time in the specified increments. If the value entered is 0:15, then the system would treat the punch as having occurred on the next 1/4 hour mark.

Example: Value set to 0:15. Any punch from 7:31 to 7:44 would be treated as 7:45. Any punch from 7:46 to 7:59 would be treated as 8:00

Shift End

Trim : Using this field, you can define how the trimming of late clock out needs to be handled in the system in a shift end. (i.e if you define this as 0:15, when an employee clocks out 15 minutes late for a shift that finished at 2.00 PM, system would still consider it to be a clock out done at 2.00PM)

Grace : Using this field, you can define how the grace timing needs to be handled in the system for a early clock out, in a shift end(i.e. if you define this as 0:05 and your employee clocks out up to 5 minutes early for a shift that ends at 2.00 PM, system would still consider the clock out to have occurred at 2.00 PM)

Fallback : "Shift End"."Fallback" applies if the employee punches Later than the Trim value or Earlier than the Grace value. This is a positive or negative value that tells the system to Adjust the time in the specified increments. If the value entered is -0:15, then the system would treat the punch as having occurred on the previous 1/4 hour mark.

Example: Value set to -0:15. Any punch from 4:31 to 4:44 would be treated as 4:30. Any punch from 4:46 to 4:59 would be treated as 4:45

General

[Dropdown] To the nearest : Using this dropdown, you can define how the general rounding needs to happen in the system (i.e. if you select 15 from the dropdown, system will be rounding the times to the nearest 15 minutes)

[Checkboxes]Apply to : Using these checkboxes, you can check that Punch Types that the General Rounding rule will apply to

Auto Lunch

Deduct After : “Deduct After” Once an employee has worked the specified number of hours in a single shift, the deduction rule takes effect. Using this field, you have define the “Deduct After” time

Deduct Amount : Using this field, you can enter the amount of time to automatically deduct for a meal break.

Lunch

Within : Using this, you can define the Off Clock duration that should be converted to a lunch break. This is interlinked to the “Break” period.

If the Break period is defined(i.e. “within” field) 0.15 & the Lunch period (i.e. within field) is defined as 1.00, then system will consider any “Off Clock” period greater than 15 minutes up to an hour as a lunch break

Min : Using this field, you can define the minimum off period for lunch. If you define this as 0:30, the minimum time off for a lunch will be considered it to be 30 even if it is lesser. (i.e. if the break is defined as 0.15, anything more than 15 minutes will be considered as a lunch break. However, if the Min is set to 0:30, in case if someone is off for 16 minutes, system will consider it to be a lunch break and also mark them as off for 30 minutes)

Grace : Using this, you can set up the grace period for a long lunch. This is the number of minutes that the employee can be clocked out in excess of “Lunch Min” and the system will calculate as though they returned exactly “Lunch Min” duration. (i.e. If you set Lunch Min to 0:30 and the Lunch Grace to 0:05, then when an employee takes a 35 minute lunch, system would consider it to be only 0.30 minutes due to the grace being set up)

Paid Portion : Using this field, you can define the paid portion of the lunch break. It does not affect how the lunch duration is calculated, it simply allows the first “Paid Portion” amount of that lunch period to be included in the Total Hours for the workspan. Leaving this blank means that No Portion of lunch is paid

Break

Within : Using this, you can define the Off Clock duration that should be converted to a rest break. (i.e. if you set this as 15 minutes, any “off clock” period of 15 minutes or less will be considered as a rest break. As mentioned above, this period has a direct link to

the lunch break. Any period beyond this period will be considered as a lunch break, assuming that the Lunch “Within” field has a value

Paid Portion : Using this field, you can specify how much of a rest break is paid. For example, you could set the paid portion to 15 minutes, but allow employees to take longer breaks. When that occurs, only the first 15 minutes of the break is paid. Leaving this field blank means that the entire break period is paid.

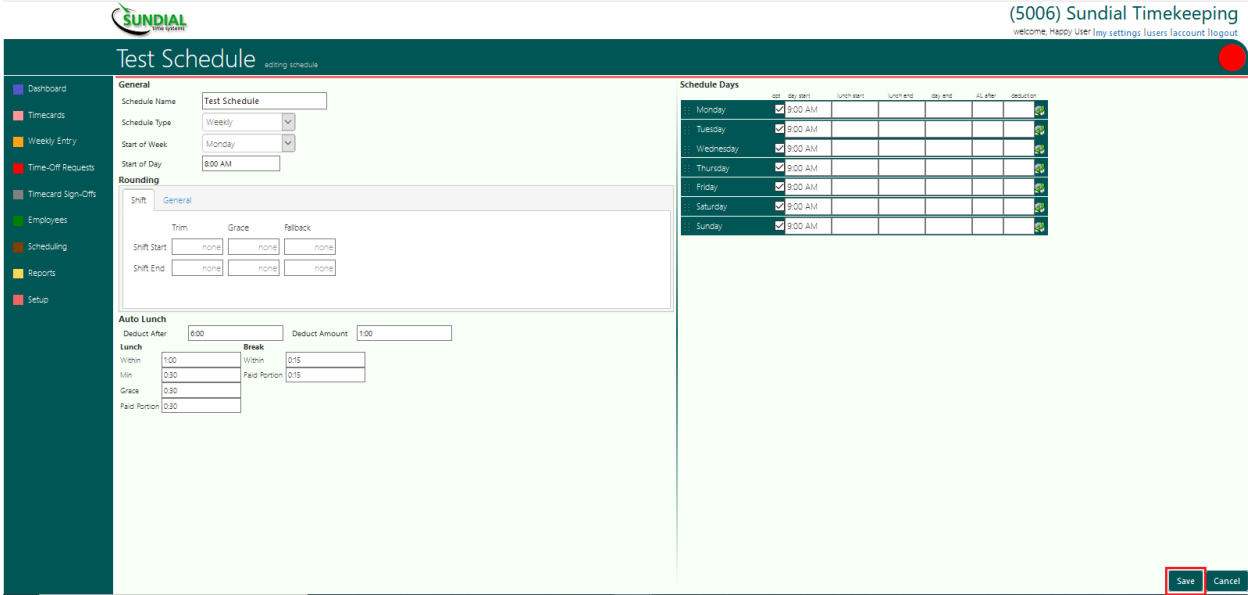
Schedule Days

This area

- a) allows the system to generate Attendance reports
- b) allows the system to create notifications for early and missed punches
- c) provides a basis for shift rounding to work
- d) provides an AutoLunch Override capability for individual days

Specifying Start and End Times allows the software to identify early and late arrivals and also allows the Trim and Grace rules to work. The information is used by Attendance reports and Notifications

Once you do the necessary selections and setting up you need to click on the “**Save**” button as shown below



Once you click on “**Save**” system will save the added schedule as shown below

Schedules

Category	Name	Type
Company Settings	Test Notifications	weebly
Rules	3 hour	custom (1 day)
Rules	6 minutes	weebly
Rules	600 AM to Midnight	weebly
Hours/Monetary	7 - 3 Lockout	weebly
Hours/Monetary	7 to 3 w/ Auto Lunch	weebly
Schedules	8 - 4 Lockout	weebly
Schedules	8 to 5 w/ Auto Lunch	weebly
Schedules	amrita 6:00 to 15:00 week days	weebly
Tracking Levels	Ashar U Islam	weebly
Tracking Levels	Banda 9:00 to 14:00 week days	weebly
Tracking Levels	Daren 09:00 - 17:00	weebly
Time-Off Limits	Destiny	weebly
Time-Off Limits	General	weebly
Time-Off Limits	Imran Khan	weebly
Export Definitions	kan 5:30 to 1:30 week day	weebly
Export Definitions	Khan 2:00pm to 10:00 pm	weebly
Export Definitions	Lunches and Breaks	weebly
Export Definitions	mason 10am-4pm	weebly
Export Definitions	microsoft MR 4-12am	weebly
Export Definitions	Roundup	weebly
Clock Groups	Shift A Jan 2017-1	weebly
Clock Groups	Suzie	weebly
Clock Identities	Tary 8am to 4:30pm	weebly
Clock Identities	Test Midnight	weebly
Punch Cycles	Test NewDay	weebly
Punch Cycles	Test Schedule	weebly
Punch Cycles	Tom Only	weebly
Punch Cycles	week days 8 to 4	weebly
Punch Cycles	Weekday	weebly

Editing "Schedules"

In order to **edit** a record, you need to first **select** the record by clicking on it as shown below.

Schedules

Category	Name	Type
Company Settings	Test Notifications	weebly
Rules	3 hour	custom (1 day)
Rules	6 minutes	weebly
Rules	600 AM to Midnight	weebly
Hours/Monetary	7 - 3 Lockout	weebly
Hours/Monetary	7 to 3 w/ Auto Lunch	weebly
Schedules	8 - 4 Lockout	weebly
Schedules	8 to 5 w/ Auto Lunch	weebly
Schedules	amrita 6:00 to 15:00 week days	weebly
Tracking Levels	Ashar U Islam	weebly
Tracking Levels	Banda 9:00 to 14:00 week days	weebly
Tracking Levels	Daren 09:00 - 17:00	weebly
Time-Off Limits	Destiny	weebly
Time-Off Limits	General	weebly
Time-Off Limits	Imran Khan	weebly
Export Definitions	kan 5:30 to 1:30 week day	weebly
Export Definitions	Khan 2:00pm to 10:00 pm	weebly
Export Definitions	Lunches and Breaks	weebly
Export Definitions	mason 10am-4pm	weebly
Export Definitions	microsoft MR 4-12am	weebly
Export Definitions	Roundup	weebly
Clock Groups	Shift A Jan 2017-1	weebly
Clock Groups	Suzie	weebly
Clock Identities	Tary 8am to 4:30pm	weebly
Clock Identities	Test Midnight	weebly
Punch Cycles	Test NewDay	weebly
Punch Cycles	Test Schedule	weebly
Punch Cycles	Tom Only	weebly
Punch Cycles	week days 8 to 4	weebly
Punch Cycles	Weekday	weebly

When clicked the selected line items will be shaded with a lighter complexion to help you differentiate it from the rest

Schedules

	Name	Type
Company Settings	Test Notifications	weekly
	3 hour	custom (1 days)
Rules	6 minute	weekly
	6:00 AM to Midnight	weekly
Hours/Monetary	7 - 3 Lockout	weekly
	7 to 3 w/Auto Lunch	weekly
	8 - 4 Lockout	weekly
Schedules	8 to 5 w/ Auto Lunch	weekly
	amita 6:00 to 15:00 week days	weekly
Tracking Levels	Azhar U Islam	weekly
	Banda 9:00 to 18:00 week days	weekly
	Damen 09:00 - 17:00	weekly
Time-Off Limits	Destiny	weekly
	General	weekly
	Imran Khan	weekly
Export Definitions	ken 5:30 to 1:30 week day	weekly
	Khan 2:00pm to 10:00 pm	weekly
Desktop	Lunches and Breaks	weekly
	mason 10am-4pm	weekly
	microsoft MR 4-12am	weekly
	Rounding	weekly
Clock Groups	Shift A Jan 2017-1	weekly
	Suze	weekly
Clock Identities	Terry Bam to 4:30pm	weekly
	Test Midnight	custom (1 days)
	Test NewDay	weekly
Punch Cycles	Test Schedule	weekly
	Tim Only	weekly
	week days 3 to 4	weekly
	Weekday	weekly

Once this is selected, you need to click on the “Edit” button as shown below

Schedules

	Name	Type
Company Settings	Test Notifications	weekly
	3 hour	custom (1 days)
Rules	6 minute	weekly
	6:00 AM to Midnight	weekly
Hours/Monetary	7 - 3 Lockout	weekly
	7 to 3 w/Auto Lunch	weekly
	8 - 4 Lockout	weekly
Schedules	8 to 5 w/ Auto Lunch	weekly
	amita 6:00 to 15:00 week days	weekly
Tracking Levels	Azhar U Islam	weekly
	Banda 9:00 to 18:00 week days	weekly
	Damen 09:00 - 17:00	weekly
Time-Off Limits	Destiny	weekly
	General	weekly
	Imran Khan	weekly
Export Definitions	ken 5:30 to 1:30 week day	weekly
	Khan 2:00pm to 10:00 pm	weekly
Desktop	Lunches and Breaks	weekly
	mason 10am-4pm	weekly
	microsoft MR 4-12am	weekly
	Rounding	weekly
Clock Groups	Shift A Jan 2017-1	weekly
	Suze	weekly
Clock Identities	Terry Bam to 4:30pm	weekly
	Test Midnight	custom (1 days)
	Test NewDay	weekly
Punch Cycles	Test Schedule	weekly
	Tim Only	weekly
	week days 3 to 4	weekly
	Weekday	weekly

Add **Edit** Delete items: 30 (7) Clone

When you click on the “Edit” button the schedule will be opened in an editable form as shown below

SUNDIAL (5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Test Schedule editing schedule

General

Schedule Name:

Schedule Type:

Start of Week:

Start of Day:

Rounding

Shift:

Trim: Grace: Fallback:

Shift Start: Shift End:

Auto Lunch

Deduct After: Deduct Amount:

Lunch

Waiter: Min: Grace: Paid Portion:

Break

Waiter: Paid Portion:

Schedule Days

	on	day	start	lunch	start	lunch	end	day	end	off	after	deduction
Monday	<input checked="" type="checkbox"/>		9:00 AM									
Tuesday	<input checked="" type="checkbox"/>		9:00 AM									
Wednesday	<input checked="" type="checkbox"/>		9:00 AM									
Thursday	<input checked="" type="checkbox"/>		9:00 AM									
Friday	<input checked="" type="checkbox"/>		9:00 AM									
Saturday	<input checked="" type="checkbox"/>		9:00 AM									
Sunday	<input checked="" type="checkbox"/>		9:00 AM									

Note : “Save” button will be in a disabled state until such time the value shown is changed. Only once you make a change the “Save” button will be enabled

Once you “Edit”, you can click on the “Save” button to save it as shown below

SUNDIAL (5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Test Schedule editing schedule

General

Schedule Name:

Schedule Type:

Start of Week:

Start of Day:

Rounding

Shift:

Trim: Grace: Fallback:

Shift Start: Shift End:

Auto Lunch

Deduct After: Deduct Amount:

Lunch

Waiter: Min: Grace: Paid Portion:

Break

Waiter: Paid Portion:

Schedule Days

	on	day	start	lunch	start	lunch	end	day	end	off	after	deduction
Monday	<input checked="" type="checkbox"/>		9:00 AM									
Tuesday	<input checked="" type="checkbox"/>		9:00 AM									
Wednesday	<input checked="" type="checkbox"/>		9:00 AM									
Thursday	<input checked="" type="checkbox"/>		9:00 AM									
Friday	<input checked="" type="checkbox"/>		9:00 AM									
Saturday	<input checked="" type="checkbox"/>		9:00 AM									
Sunday	<input checked="" type="checkbox"/>		9:00 AM									

Once you click on the **“Save”** button, system will save the changes and it will be displayed as shown below

(5006) Sundial Timekeeping
welcome, H300 User | my settings | users | account | logout

Schedules

Category	Name	Type
Company Settings	Test Notifications	weebly
Rules	3 hour	custom (1 days)
	6 minute	weebly
Hours/Monetary	6:00 AM to Midnight	weebly
	7 - 3 Lockout	weebly
	7 to 3 w/Auto Lunch	weebly
Schedules	8 - 4 Lockout	weebly
	8 to 5 w/ Auto Lunch	weebly
	amita 6:00 to 15:00 week days	weebly
Tracking Levels	Asfar U Islam	weebly
	Brenda 8:00 to 14:00 week days	weebly
	Darren 09:00 - 17:00	weebly
Time-Off Limits	Destiny	weebly
	General	weebly
	Imran Khan	weebly
Export Definitions	ken 5:30 to 1:30 week day	weebly
	Khan 2:00pm to 10:00 pm	weebly
Desktop	Lunches and Breaks	weebly
	mason 10am-4pm	weebly
	microsoft MR 4-12am	weebly
Clock Groups	Rounding	weebly
	Shift A Jan 2017-1	weebly
	Suzie	weebly
Clock Identities	Terry 8am to 4:30pm	weebly
	Test Midnight	weebly
	Test Schedule	custom (1 days)
Punch Cycles	Test Schedule Edited	weebly
	Tim Only	weebly
	week days 8 to 4	weebly
	Weekday	weebly

Deleting “Schedules”

In order to **“Delete”** a you need, you need to first select the **“Schedule”** by clicking on it as shown below

(5006) Sundial Timekeeping
welcome, H300 User | my settings | users | account | logout

Schedules

Category	Name	Type
Company Settings	Test Notifications	weebly
Rules	3 hour	custom (1 days)
	6 minute	weebly
Hours/Monetary	6:00 AM to Midnight	weebly
	7 - 3 Lockout	weebly
	7 to 3 w/Auto Lunch	weebly
Schedules	8 - 4 Lockout	weebly
	8 to 5 w/ Auto Lunch	weebly
	amita 6:00 to 15:00 week days	weebly
Tracking Levels	Asfar U Islam	weebly
	Brenda 8:00 to 14:00 week days	weebly
	Darren 09:00 - 17:00	weebly
Time-Off Limits	Destiny	weebly
	General	weebly
	Imran Khan	weebly
Export Definitions	ken 5:30 to 1:30 week day	weebly
	Khan 2:00pm to 10:00 pm	weebly
Desktop	Lunches and Breaks	weebly
	mason 10am-4pm	weebly
	microsoft MR 4-12am	weebly
Clock Groups	Rounding	weebly
	Shift A Jan 2017-1	weebly
	Suzie	weebly
Clock Identities	Terry 8am to 4:30pm	weebly
	Test Midnight	weebly
	Test NewDay	custom (1 days)
Punch Cycles	Test Schedule Edited	weebly
	Tim Only	weebly
	week days 8 to 4	weebly
	Weekday	weebly

Once you click on a Salary Rule the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Schedules

Category	Name	Type
Company Settings	Test Notifications	weekly
Rules	3 hour	custom (1 days)
Rules	6 minute	weekly
Rules	600 AM to Midnight	weekly
Hours/Monetary	7 - 3 Lockout	weekly
Hours/Monetary	7 to 3 w/Auto Lunch	weekly
Schedules	8 - 4 Lockout	weekly
Schedules	8 to 5 w/ Auto Lunch	weekly
Tracking Levels	amrita 6:00 to 15:00 week days	weekly
Tracking Levels	Ashar 11 Intern	weekly
Tracking Levels	Brenda 9:00 to 14:00 week days	weekly
Time-Off Limits	Darren 09:00 - 17:00	weekly
Time-Off Limits	Destiny	weekly
Time-Off Limits	General	weekly
Time-Off Limits	Imran Khan	weekly
Export Definitions	Kan 5:30 to 1:30 week day	weekly
Export Definitions	Khan 2:00pm to 10:00 pm	weekly
Desktop	Lunches and Breaks	weekly
Desktop	mason 10am-4pm	weekly
Desktop	microsoft MR 4-12am	weekly
Clock Groups	Roundup	weekly
Clock Groups	Shift A Jan 2017-1	weekly
Clock Identities	Suzie	weekly
Clock Identities	Terry 2am to 4:30pm	weekly
Clock Identities	Test Midnight	custom (1 days)
Punch Cycles	Test NewDay	weekly
Punch Cycles	Test Double Edited	weekly
Punch Cycles	Test Only	weekly
Punch Cycles	week days 8 to 4	weekly
Punch Cycles	Weekday	weekly

Once selected, you can click on the “Delete” button as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Schedules

Category	Name	Type
Company Settings	Test Notifications	weekly
Rules	3 hour	custom (1 days)
Rules	6 minute	weekly
Rules	600 AM to Midnight	weekly
Hours/Monetary	7 - 3 Lockout	weekly
Hours/Monetary	7 to 3 w/Auto Lunch	weekly
Schedules	8 - 4 Lockout	weekly
Schedules	8 to 5 w/ Auto Lunch	weekly
Tracking Levels	amrita 6:00 to 15:00 week days	weekly
Tracking Levels	Ashar 11 Intern	weekly
Tracking Levels	Brenda 9:00 to 14:00 week days	weekly
Time-Off Limits	Darren 09:00 - 17:00	weekly
Time-Off Limits	Destiny	weekly
Time-Off Limits	General	weekly
Time-Off Limits	Imran Khan	weekly
Export Definitions	Kan 5:30 to 1:30 week day	weekly
Export Definitions	Khan 2:00pm to 10:00 pm	weekly
Desktop	Lunches and Breaks	weekly
Desktop	mason 10am-4pm	weekly
Desktop	microsoft MR 4-12am	weekly
Clock Groups	Roundup	weekly
Clock Groups	Shift A Jan 2017-1	weekly
Clock Identities	Suzie	weekly
Clock Identities	Terry 2am to 4:30pm	weekly
Clock Identities	Test Midnight	custom (1 days)
Punch Cycles	Test NewDay	weekly
Punch Cycles	Test Double Edited	weekly
Punch Cycles	Test Only	weekly
Punch Cycles	week days 8 to 4	weekly
Punch Cycles	Weekday	weekly

Items: 30 (1)

Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Schedules

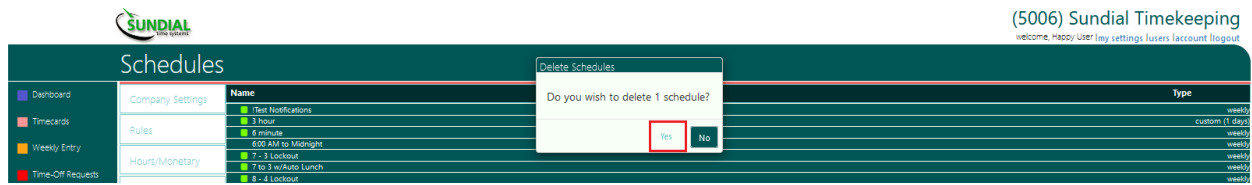
Category	Name	Type
Company Settings	Test Notifications	weekly
Rules	3 hour	custom (1 days)
Rules	6 minute	weekly
Rules	600 AM to Midnight	weekly
Hours/Monetary	7 - 3 Lockout	weekly
Hours/Monetary	7 to 3 w/Auto Lunch	weekly
Schedules	8 - 4 Lockout	weekly

Delete Schedules

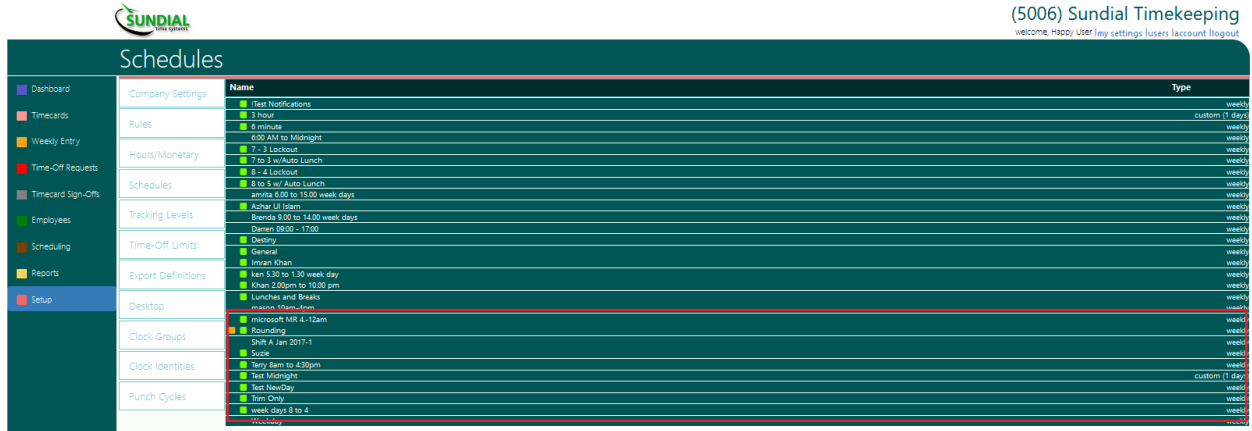
Do you wish to delete 1 schedule?

Yes

In order to delete, you need to click “Ok” on this pop-up/overlay as shown below



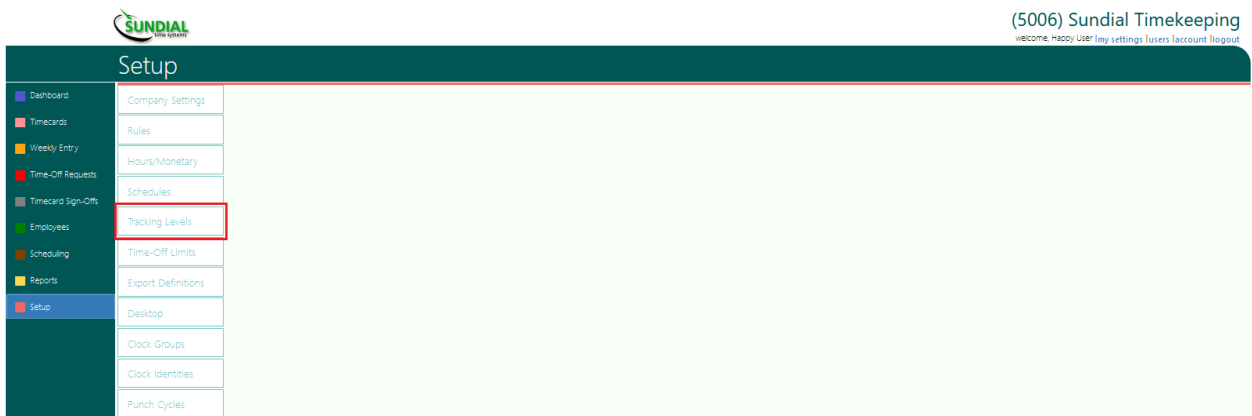
Once you click “Ok” the system will then delete the selected rule as shown below



5.11.7. Tracking Levels

Going into “Tracking Levels”

In order to get into the “Tracking Levels” you need to click on “Tracking Levels” under the “Setup” section as shown below



Once you click on “Tracking Levels” section, you will be navigated to the “Tracking Levels” page as shown below

Company Settings		Name	Codes	Deactivated
Department			18	4
Customer			12	3
Operation			6	0
Class / Grant			11	0
Region			3	0
Grouping			2	0
Location			4	0
Jobs			16	2

Understanding the “Tracking Levels”

In the “Tracking Levels” page, you will see 8 Tracking Levels. Each of the Tracking Levels can be renamed to suit your own purposes. The order of the levels cannot be modified.

When it comes to “Tracking Levels” you are not allowed to “Add” new tracking levels instead you will be allowed to edit existing “Tracking Levels”

Editing “Tracking Levels”

In order to **edit** a record, you need to first **select** the record by clicking on it as shown below.

Company Settings		Name	Codes	Deactivated
Department			18	4
Customer			12	3
Operation			6	0
Class / Grant			11	0
Region			3	0
Grouping			2	0
Location			4	0
Jobs			16	2

When clicked the selected line items will be shaded with a lighter complexion to help you differentiate it from the rest

Company Settings		Name	Codes	Deactivated
Department			18	4
Customer			12	3
Operation			6	0
Class / Grant			11	0
Region			3	0
Grouping			2	0
Location			4	0
Jobs			16	2

Once this is selected, you need to click on the “Edit” button as shown below

Name	Codes	Deactivated
Department	18	4
Customer	12	3
Operator	3	0
Class / Grant	11	0
Region	3	0
Grouping	2	0
Location	4	0
Jobs	16	2

When you click on the **“Edit”** button the Tracking Level will be opened in an editable form as shown below

Name	Tracking Code	Export Code 1	Export Code 2	Duration	Alternate Pay Rate	Deactivated
CESS	655	3077			edit	<input type="checkbox"/>
Default	9988	BR62			edit	<input type="checkbox"/>
Distribution	300				edit	<input type="checkbox"/>
Energy/Guard	300				edit	<input type="checkbox"/>
Environmental					edit	<input checked="" type="checkbox"/>
General		BR1000			edit	<input type="checkbox"/>
IT/Networking	15	BR549			edit	<input type="checkbox"/>
Jambonal	65265	BR1			edit	<input type="checkbox"/>
Library					edit	<input type="checkbox"/>
Maintenance	65266	BR998877			edit	<input type="checkbox"/>
Manufacturing	65267	BR78899			edit	<input type="checkbox"/>
New York State Fair					edit	<input type="checkbox"/>
outdoor pool					edit	<input type="checkbox"/>
Production	400				edit	<input checked="" type="checkbox"/>
PROGRESS ENERGY	7993	BR7993			edit	<input type="checkbox"/>
TALEORIS	7425	BR7425			edit	<input checked="" type="checkbox"/>
Terry	500				edit	<input checked="" type="checkbox"/>
Warehouse	200				edit	<input type="checkbox"/>

Note : **“Save”** button will be in a disabled state until such time the value shown is changed. Only once you make a change the **“Save”** button will be enabled

Understanding the “Tracking Levels”

Name : This field displays the name of the selected **“Tracking Level”**

[Button] Add Row : Using this button, you can add a new Row to the Tracking Level

In order to add a new “Tracking Level Item”, you need to click on the “Add Row” button as shown below

(5006) Sundial Timekeeping
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Department editing tracking level

Name: Department
Allow Sub-items:

Tracking Level Items

Name	Tracking Code	Export Code 1	Export Code 2	Duration	Alternate Pay Rate	Deactivated
Warehouse	200				edit	<input type="checkbox"/>
Terry	300				edit	<input checked="" type="checkbox"/>
TALLECRIS	7425	BR7425			edit	<input checked="" type="checkbox"/>
PROGRESS ENERGY	7993	BR7993			edit	<input checked="" type="checkbox"/>
Production	400				edit	<input checked="" type="checkbox"/>
Outdoor pool					edit	<input type="checkbox"/>
New York State Fair					edit	<input type="checkbox"/>
Manufacturing	65267	BR778899			edit	<input type="checkbox"/>
Maintenance	65266	BR998877			edit	<input type="checkbox"/>
Library					edit	<input type="checkbox"/>
Lanitorial	65265	BR1			edit	<input type="checkbox"/>
IT/Networking	15	BR549			edit	<input type="checkbox"/>
General		BR1000			edit	<input type="checkbox"/>
Environmental					edit	<input checked="" type="checkbox"/>
Emergi/Guard					edit	<input type="checkbox"/>
Distribution	300				edit	<input type="checkbox"/>
Default	9988	BR62			edit	<input type="checkbox"/>
CESS	655	3077			edit	<input type="checkbox"/>

Add Row Save Cancel

Once you click on “Add Row” system will add an empty “Tracking Level Item”

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Department editing tracking level

Name: Department
Allow Sub-items:

Tracking Level Items

Name	Tracking Code	Export Code 1	Export Code 2	Duration	Alternate Pay Rate	Deactivated
Warehouse	200				edit	<input type="checkbox"/>
Terry	300				edit	<input checked="" type="checkbox"/>
TALLECRIS	7425	BR7425			edit	<input checked="" type="checkbox"/>
PROGRESS ENERGY	7993	BR7993			edit	<input checked="" type="checkbox"/>
Production	400				edit	<input checked="" type="checkbox"/>
Outdoor pool					edit	<input type="checkbox"/>
New York State Fair					edit	<input type="checkbox"/>
Manufacturing	65267	BR778899			edit	<input type="checkbox"/>
Maintenance	65266	BR998877			edit	<input type="checkbox"/>
Library					edit	<input type="checkbox"/>
Lanitorial	65265	BR1			edit	<input type="checkbox"/>
IT/Networking	15	BR549			edit	<input type="checkbox"/>
General		BR1000			edit	<input type="checkbox"/>
Environmental					edit	<input checked="" type="checkbox"/>
Emergi/Guard					edit	<input type="checkbox"/>
Distribution	300				edit	<input type="checkbox"/>
Default	9988	BR62			edit	<input type="checkbox"/>
CESS	655	3077			edit	<input type="checkbox"/>

Add Row Save Cancel

Understanding a Tracking Level Item

Name : Using this field, you can enter the name of the Tracking Level Item

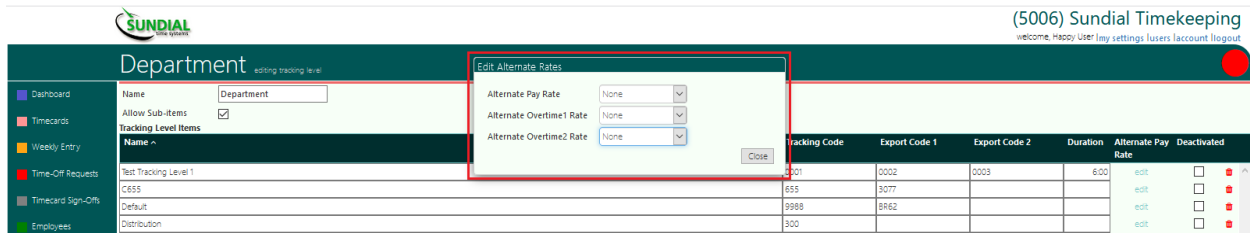
Tracking Code : Using this field, you can add a tracking code to the Tracking Level Item

Export Code 1 : Using this field, you can add the export code 1 to the Tracking Level Item

Export Code 2 : Using this field, you can add the export code 2 to the Tracking Level Item

Duration : Using this field, you can enter the Override Duration of the Tracking Level Item in order to modify the punch times for this specific tracking level item

Alternate Pay Rate : Using this field you can define if there is any alternate pay rate that is associated with this Tracking Level Item. When you click on edit, system will display a pop-up/overlay as shown below



The loaded pop-up/overlay contains 3 different dropdowns

Alternate Pay Rate : Using this dropdown, you can choose any alternate pay rate that is associated for this Tracking level item

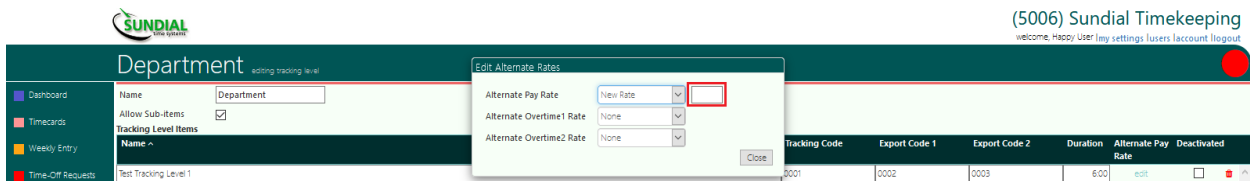
Alternate Overtime 1 rate : Using this dropdown, you can choose any alternate overtime 1 rate that is associated for this Tracking level item

Alternate Overtime 2 rate : Using this dropdown, you can choose any alternate overtime 2 rate that is associated for this Tracking level item

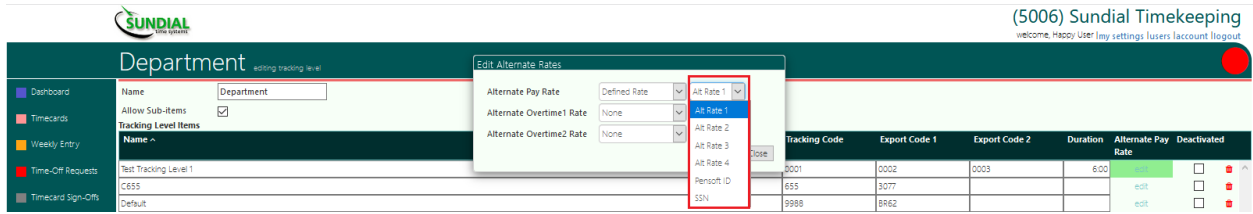
Each of these dropdowns contain the below values to choose from

None : By default it will be selected to “None”. This means there isn’t an alternate pay rate is used

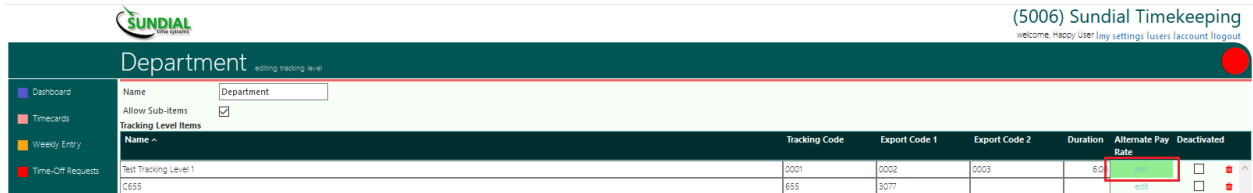
New Rate : Using this dropdown option, you can define a new rate. When a new rate is selected the system will display an additional text box as shown below in order for you to define the new rate as shown below.



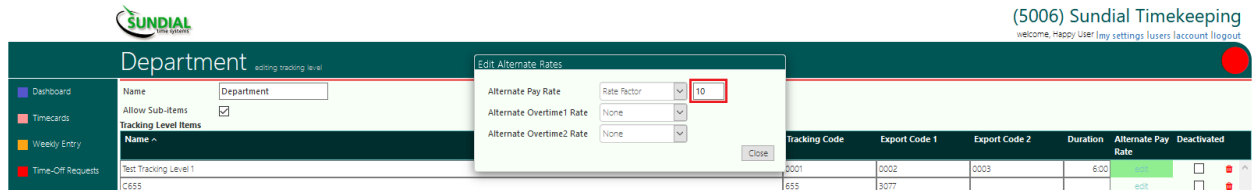
Defined Rate : Using this dropdown option, you will be able to choose a defined rate. When the defined rate is selected the system will load an additional dropdown in order for you to specify the Employee Custom Property that will provide the new rate. If the Employee Custom Property selected does not have a value in it for a specific employee, then the resulting rate will be unchanged from the Employee Default



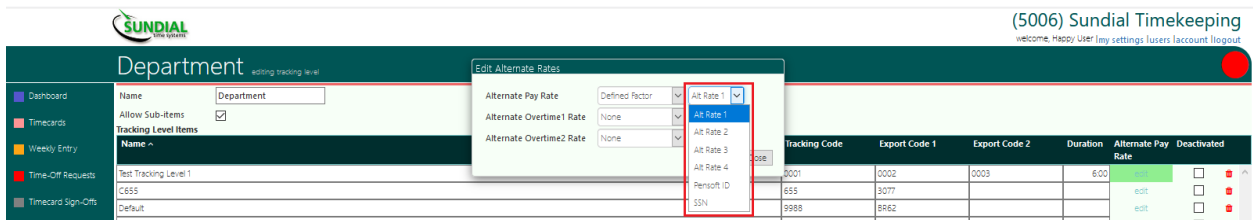
When a Tracking level item is using a defined rate, system will highlight the “Alternate pay rate” field in “Green” as shown below



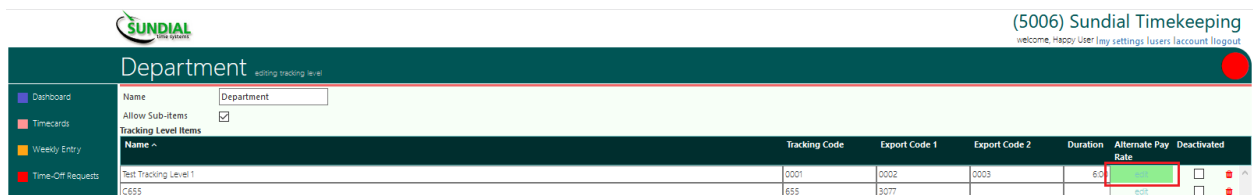
Rate Factor : Using this dropdown, you can define a “Rate Factor” for the Tracking Level item. It can be defined as a percentage and the percentage value can be keyed in to the text box that gets loaded next to the dropdown as shown below



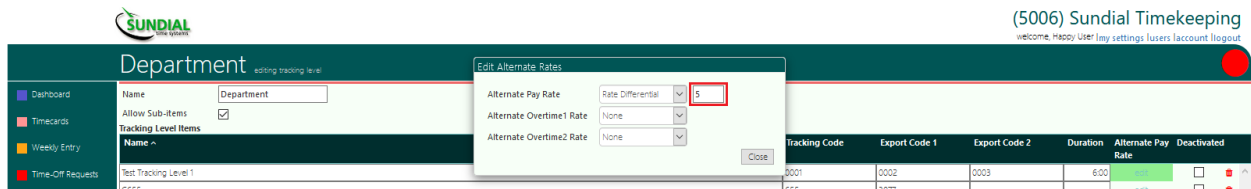
Defined Factor : Using this dropdown option, you will be able to choose a defined factor. When the defined factor is selected the system will load an additional dropdown in order for you to choose the defined factor from any outside source available as shown below



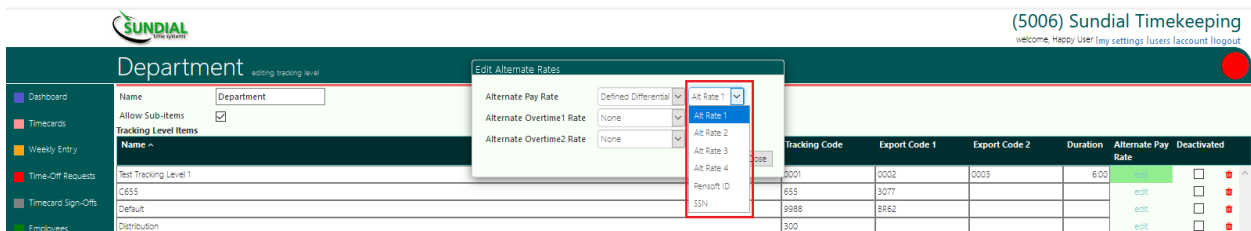
When a Tracking level item is using a defined factor, system will highlight the “Alternate pay rate” field in “Green” as shown below



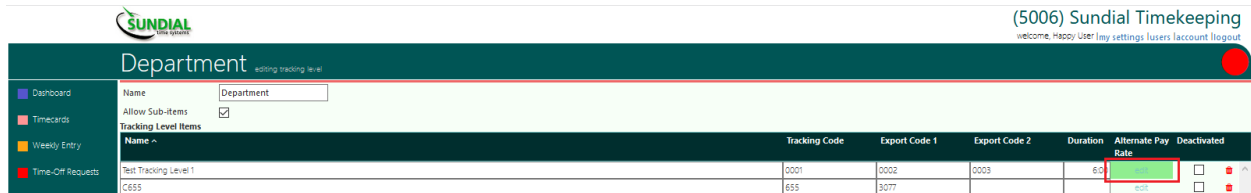
Rate Differential : Using this dropdown item, you will be able to add a “Rate Differential” to the “Alternate Pay rate” Rate Differential is an additional amount that is added to the regular pay. When you select Rate Differential, system will load an additional text box next to the dropdown using which you can add the additional amount to the pay as shown below



Defined Differential : Using this dropdown option, you will be able to choose a defined differential. When the defined differential is selected the system will load an additional dropdown in order for you to choose the defined differential from any outside source available as shown below



When a Tracking level item is using a defined factor, system will highlight the “Alternate pay rate” field in “Green” as shown below



Once you “Edit” and make the necessary changes, you can then click on the “Save” button to save it as shown below

(5006) Sundial Timekeeping
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Department editing tracking level

Name: Department
Allow Sub-Items:

Name	Tracking Code	Export Code 1	Export Code 2	Duration	Alternate Pay Rate	Deactivated
Test Tracking Level 1	0001	0002	0003	6:00	edit	<input type="checkbox"/>
CESS	655	3077			edit	<input type="checkbox"/>
Default	9999	BR62			edit	<input type="checkbox"/>
Distribution	300				edit	<input type="checkbox"/>
Energy/Guard					edit	<input type="checkbox"/>
Environmental					edit	<input checked="" type="checkbox"/>
General		BR1000			edit	<input type="checkbox"/>
IT/Networking	15	BR549			edit	<input type="checkbox"/>
Jamborial	65265	BR1			edit	<input type="checkbox"/>
library					edit	<input type="checkbox"/>
Maintenance	65266	BR998877			edit	<input type="checkbox"/>
Manufacturing	65267	BR788999			edit	<input type="checkbox"/>
New York State Fair					edit	<input type="checkbox"/>
outdoor pool					edit	<input type="checkbox"/>
Production	400				edit	<input checked="" type="checkbox"/>
PROGRESS ENERGY	7993	BR7993			edit	<input type="checkbox"/>
TALCORIS	7425	BR7425			edit	<input checked="" type="checkbox"/>
Terry	500				edit	<input checked="" type="checkbox"/>
Warehouse	200				edit	<input type="checkbox"/>

Save Cancel

Once you click on the “Save” button, system will save the changes

Deactivating a Tracking Level Item

In order to deactivate a Tracking Level item, you need to check on the checkbox listed under the “Deactivate” title for the relevant Tracking Level Item as shown below

(5006) Sundial Timekeeping
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Department editing tracking level

Name: Department
Allow Sub-Items:

Name	Tracking Code	Export Code 1	Export Code 2	Duration	Alternate Pay Rate	Deactivated
CESS	655	3077			edit	<input type="checkbox"/>
Default	9999	BR62			edit	<input type="checkbox"/>
Distribution	300				edit	<input type="checkbox"/>
Energy/Guard					edit	<input type="checkbox"/>
Environmental					edit	<input checked="" type="checkbox"/>
General		BR1000			edit	<input type="checkbox"/>
IT/Networking	15	BR549			edit	<input type="checkbox"/>
Jamborial	65265	BR1			edit	<input type="checkbox"/>
library					edit	<input type="checkbox"/>
Maintenance	65266	BR998877			edit	<input type="checkbox"/>
Manufacturing	65267	BR788999			edit	<input type="checkbox"/>
New York State Fair					edit	<input type="checkbox"/>
outdoor pool					edit	<input type="checkbox"/>
Production	400				edit	<input checked="" type="checkbox"/>
PROGRESS ENERGY	7993	BR7993			edit	<input type="checkbox"/>
TALCORIS	7425	BR7425			edit	<input checked="" type="checkbox"/>
Terry	500				edit	<input checked="" type="checkbox"/>
Test Tracking Level 1	0001	0002	0003	6:00	edit	<input checked="" type="checkbox"/>
Warehouse	200				edit	<input type="checkbox"/>

By default this will be unchecked, however if you check this, system will consider this Tracking Level Item as deactivated. A deactivated Tracking Level Item will continue to be visible here, but in other areas of the software, they are removed from the selection options. Deactivating an item allows the system to continue including it when viewing existing data on screen and in reports.

Deleting a Tracking Level item

In order to delete a Tracking Level item, you need to click on the “Delete” icon of the relevant Tracking Level Item as shown below. Delete tracking levels only if you are confident that you will never need to see them in any report or view

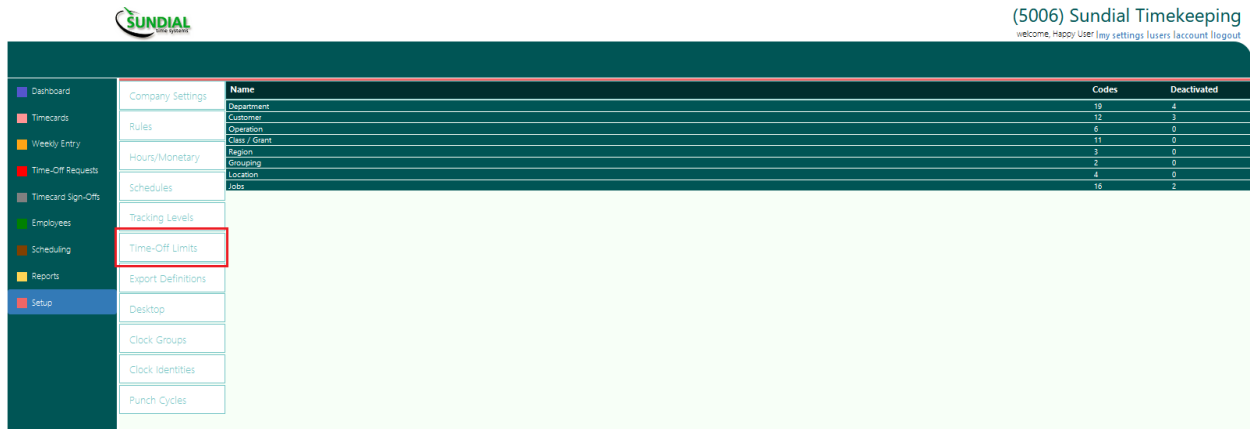
The screenshot shows the 'Department' page in the Sundial Timekeeping system. The page title is 'Department' with a sub-header 'editing tracking level'. The 'Allow Sub-Items' checkbox is checked. The 'Tracking Level Items' table is displayed with the following columns: Name, Tracking Code, Export Code 1, Export Code 2, Duration, Alternate Pay Rate, and Deactivated. The 'Deactivated' column contains checkboxes and delete icons. The 'Task Tracking Level' row is highlighted, and its delete icon is enclosed in a red box.

Name	Tracking Code	Export Code 1	Export Code 2	Duration	Alternate Pay Rate	Deactivated
CESS	655	3077			edit	<input type="checkbox"/>
Default	9989	BR62			edit	<input type="checkbox"/>
Distribution	300				edit	<input type="checkbox"/>
Energy/Guard					edit	<input type="checkbox"/>
Environmental					edit	<input checked="" type="checkbox"/>
General		BR1000			edit	<input type="checkbox"/>
IT/Networking	15	BR549			edit	<input type="checkbox"/>
Jamborial	65285	BR1			edit	<input type="checkbox"/>
library					edit	<input type="checkbox"/>
Maintenance	65266	BR998877			edit	<input type="checkbox"/>
Manufacturing	65267	BR778899			edit	<input type="checkbox"/>
New York State Fair					edit	<input type="checkbox"/>
outdoor pool					edit	<input type="checkbox"/>
Production	400				edit	<input checked="" type="checkbox"/>
PROGRESS ENERGY	7593	BR7593			edit	<input type="checkbox"/>
TALDOBIS	7425	BR7425			edit	<input type="checkbox"/>
Terry	500				edit	<input checked="" type="checkbox"/>
Task Tracking Level	0001	0002	0003	6.00	edit	<input type="checkbox"/>
Warehouse	200				edit	<input type="checkbox"/>

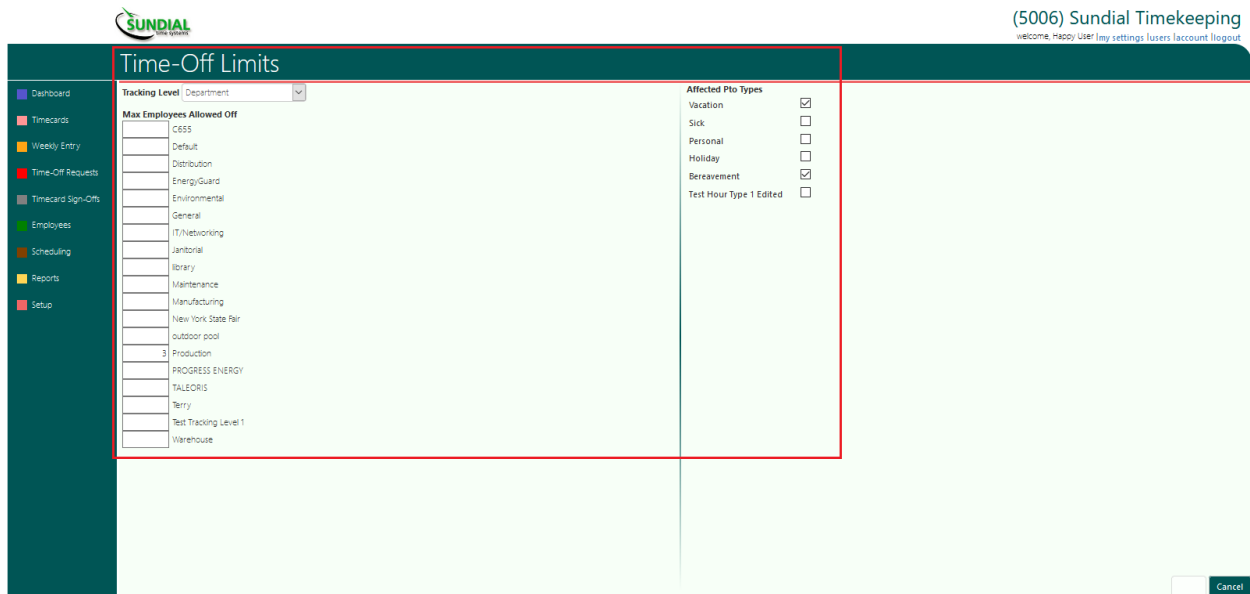
5.11.8. Time-off Limits

Going into “Time-off Limits”

In order to get in to the “Time-off Limits” you need to click on “Time-off Limits” under the “Setup” section as shown below



Once you click on “Time-off Limits” section, you will be navigated in to the “Time-off Limits” page as shown below

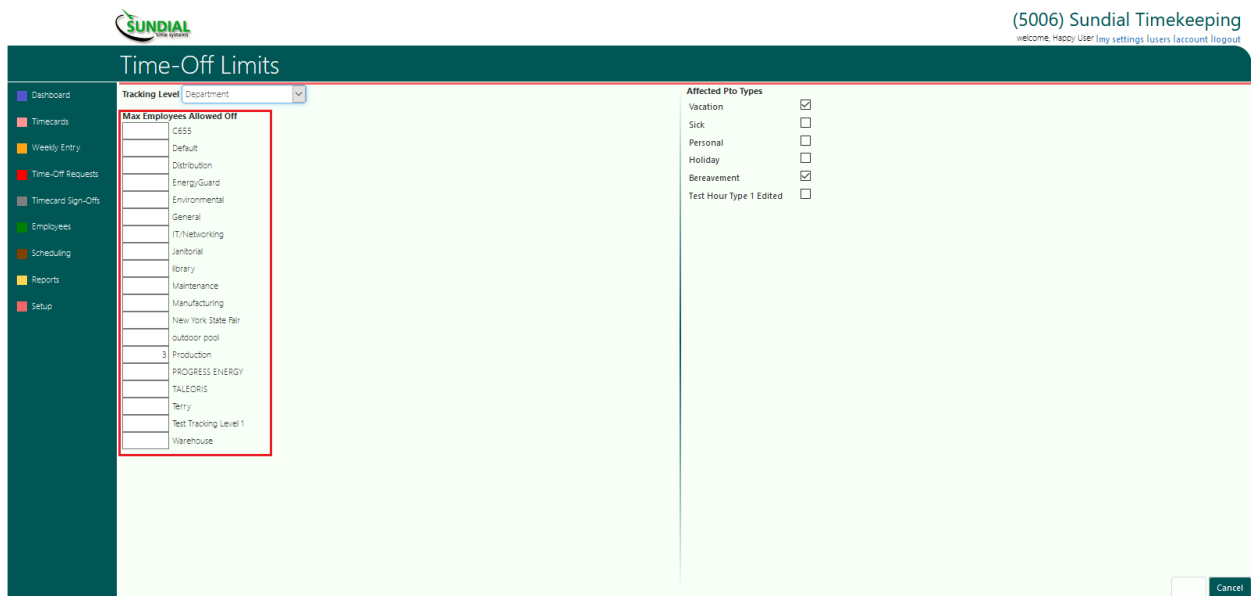


Understanding the “Time-off Limits”

Using this section, you can select the maximum employees that are allowed to take time off for each of these Tracking Level Items. Normally the Level used would be something like a Department (or Division, Location, etc.) Then applying values to the Items within that level would dictate the most people within that department that can be absent on the same day. In order to know if a person is “in” a given department, they must be Assigned to it in their Employee Record.

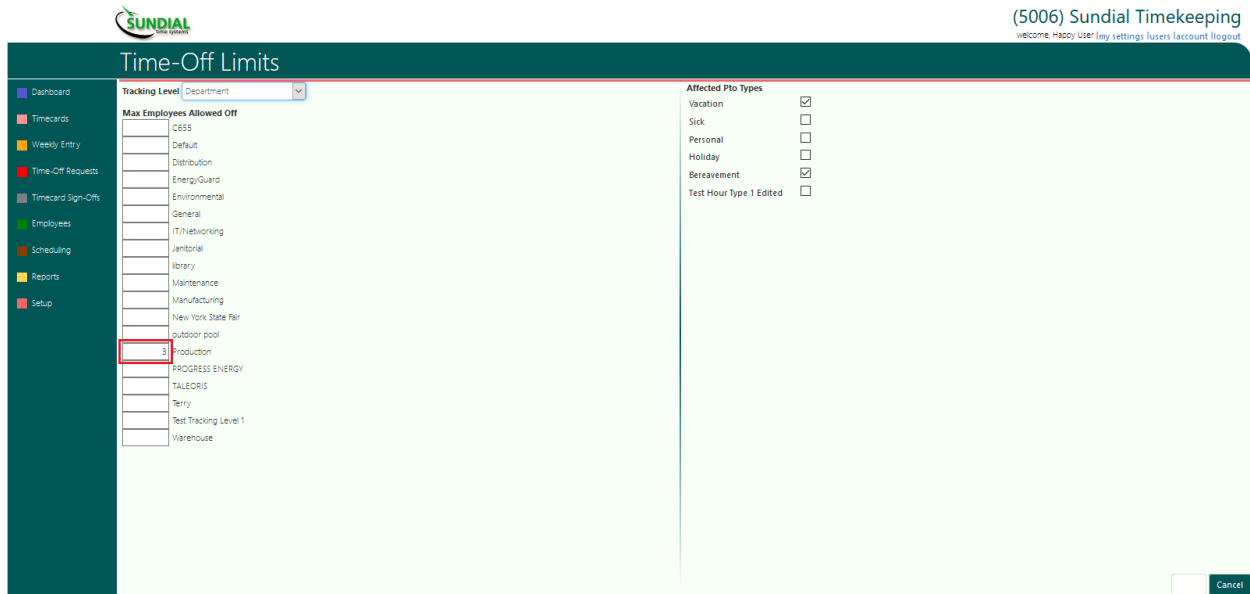
Tracking Level : Using this dropdown, you can choose the required tracking level

Once the Tracking Level is chosen, system will display each of the items that are available under the selected tracking level as show below



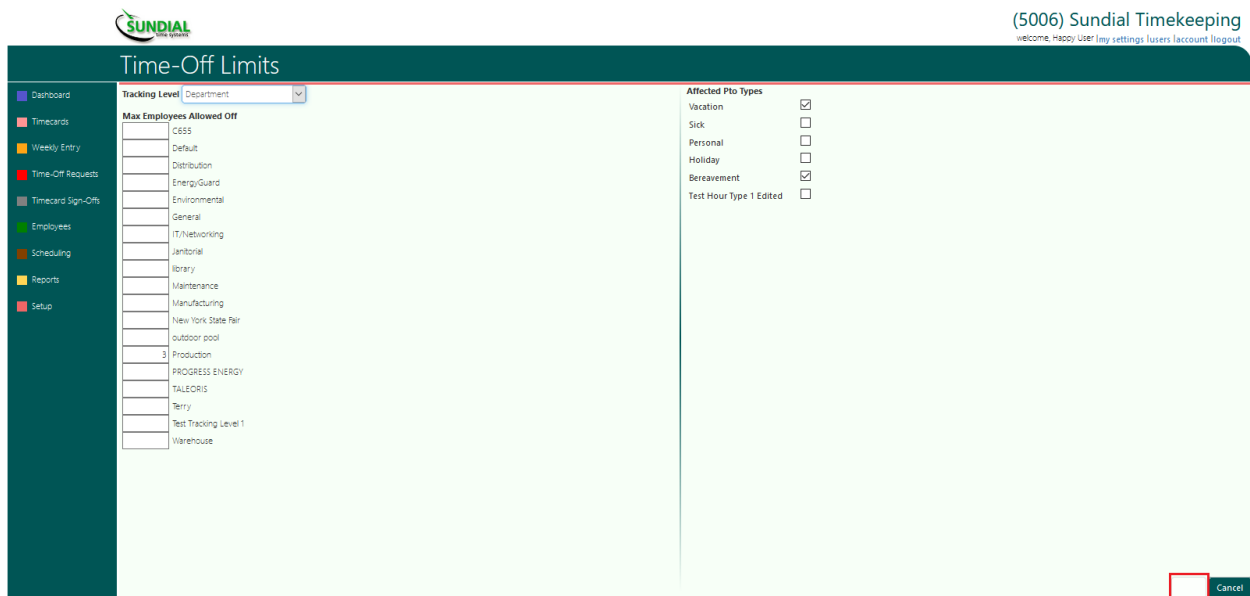
The screenshot displays the 'Time-Off Limits' configuration page in the Sundial Timekeeping system. The page title is 'Time-Off Limits' and the user is identified as '(5006) Sundial Timekeeping'. The interface includes a sidebar with navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area features a 'Tracking Level' dropdown menu currently set to 'Department'. Below this, a list of 'Max Employees Allowed Off' items is shown, including CSES, Default, Distribution, Energy/Guard, Environmental, General, IT/Networking, Janitorial, Library, Maintenance, Manufacturing, New York State Fair, Outdoor pool, Production, PROGRESS ENERGY, TALECRIS, Terry, Test Tracking Level 1, and Warehouse. To the right, the 'Affected Pto Types' section contains checkboxes for Vacation (checked), Sick, Personal, Holiday, Bereavement (checked), and Test Hour Type 1 Edited (unchecked). A 'Cancel' button is located at the bottom right of the page.

Once the Tracking Level items are listed, you can define the maximum employees that are allowed to request for time offs for the listed items as shown below

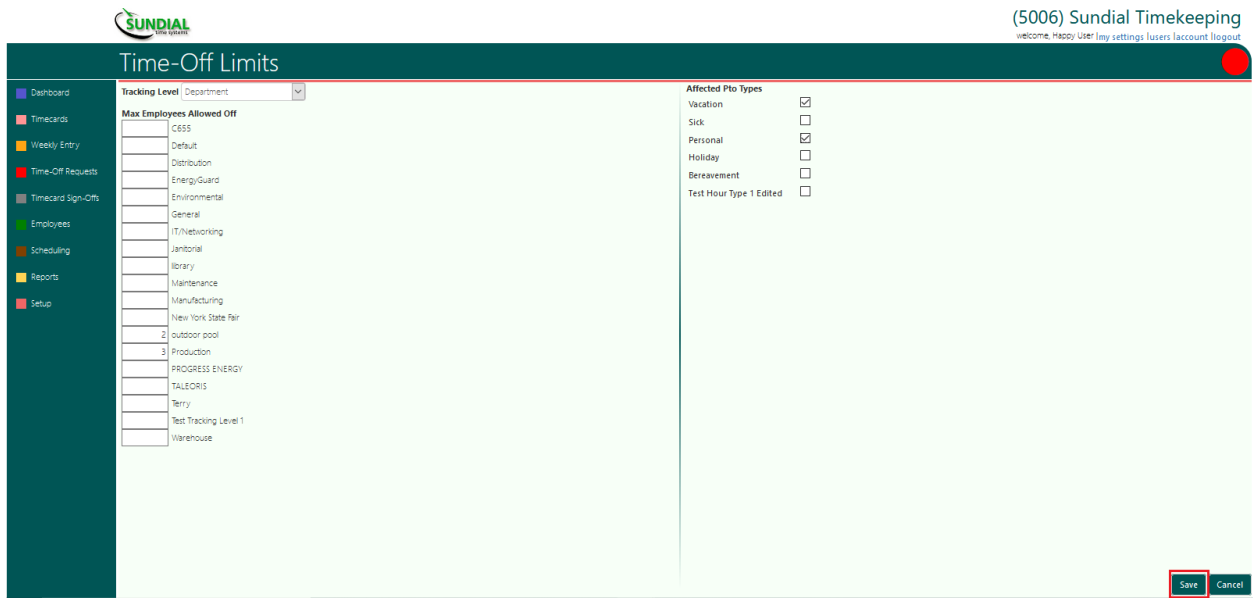


Affected PTO types : Using these checkboxes, you will be able to specify which of your Hours types are affected by these time-off limits. These will vary based on your organizational configurations.

Until you make any changes to the existing records the save button will be in a disabled state as shown below



Once the relevant changes are made, “Save” button will be enabled as shown below



Once you click on the “Save” button, system will save the changes made

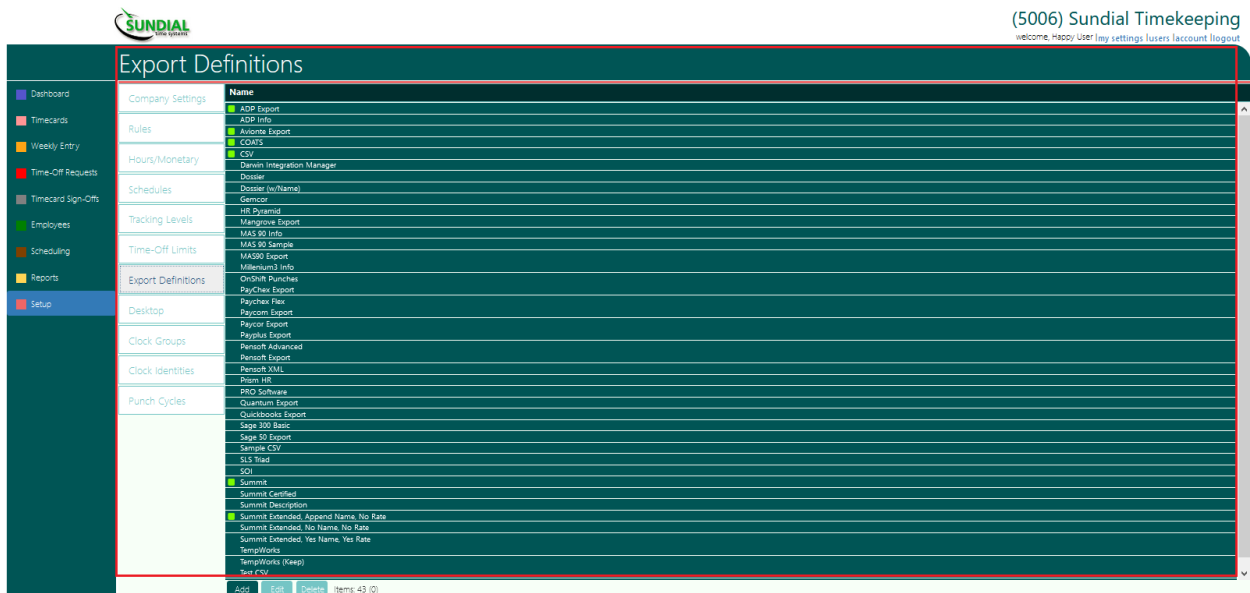
5.11.9. Export Definitions

Going into “Export Definitions”

In order to get in to the “Export Definitions” you need to click on “Export Definitions” under the “Setup” section as shown below



Once you click on “Export Definitions” section, you will be navigated in to the “Export Definitions” page as shown below



Understanding the “Export Definitions”

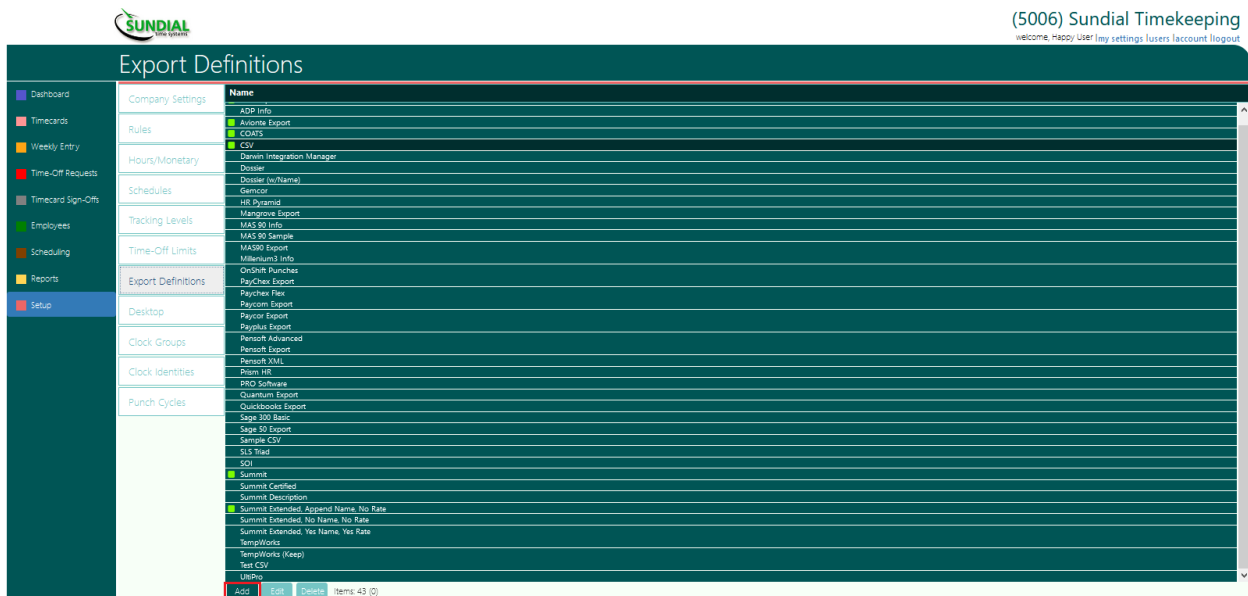
System will display any pre-configured Export Definitions in this section. Companies will usually need only one export type defined. Occasionally additional ones are warranted.

Export Definitions are used for configuring your software to transfer data to other software products, usually a third party payroll software.

In addition to this you will see 3 buttons as listed below

- **[Button] Add** : Using this button, you can “**Add**” a new Export Definition to the system
- **[Button] Edit** : Using this button, you can “**Edit**” any existing Export Definition in the system
- **[Button] Delete** : Using this button, you can “**Delete**” any existing Export Definition in the system

In order to “Add” a new “Export Definition” you need to click on the “Add” button as shown below



The screenshot displays the 'Export Definitions' page in the Sundial Timekeeping system. The page title is 'Export Definitions' and the user is logged in as 'Happy User'. The page shows a list of existing export definitions with columns for Name, Add, Edit, and Delete. The 'Add' button is highlighted in red at the bottom of the list.

Name	Add	Edit	Delete
ADP Info			
Avalara Export			
COATS			
CSV			
Onem Integration Manager			
Dossier			
Dossier (w/Name)			
Genstar			
HR Dynamid			
Mangrove Export			
MAS90 Info			
MAS90 Export			
MAS90 Sample			
MAS90 Info			
Millenium3 Info			
OnDine Punches			
PayChex Export			
PayChex Flex			
Paycom Export			
Paycom Export			
PayPlus Export			
PayPlus Export			
Pensior Advanced			
Pensior Export			
Pensior XML			
Pion HR			
PRO Software			
Quantum Export			
Quickbooks Export			
Sage 100 Basic			
Sage 100 Export			
Simple CSV			
SLS Trad			
SLS			
Summit			
Summit Certified			
Summit Description			
Summit Extended			
Summit Extended, Append Name, No Rate			
Summit Extended, No Name, No Rate			
Summit Extended, Yes Name, No Rate			
Summit Extended, Yes Name, Yes Rate			
TempWorks			
TempWorks (Keep)			
Test CSV			
UnEmp			

Once you click on the “Add” button, system will display “Export Definition” page as shown below

Understanding the “Export Definition” Page

Name : Using this field, you can define the name for the export definition

Default File Name : Using this field, you can define the Default File Name for the exported file

Export Type : Using this field, you can choose the export type. Generally this will be your Payroll Software, or the product your Payroll Provider uses. (i.e. CSV, QuickBooks, Sage, PayChex, PayPlus, Pro Software, etc.)

Export Properties: Once you click on the Export Properties system will load a pop-up/overlay as shown below

In the Export Properties you get define some parameters which are explained below

Date Grouping : Using this dropdown, you can select the date grouping (i.e. if its Summary or Daily)

Field Delimiter : Using this dropdown, you can define the field delimiter (i.e. if its a comma, tab or pipe)

Use Header : Using this dropdown, you can define if a header has to be used or not

Duration Format : Using this dropdown, you can define the duration format (i.e. Time or Decimal)

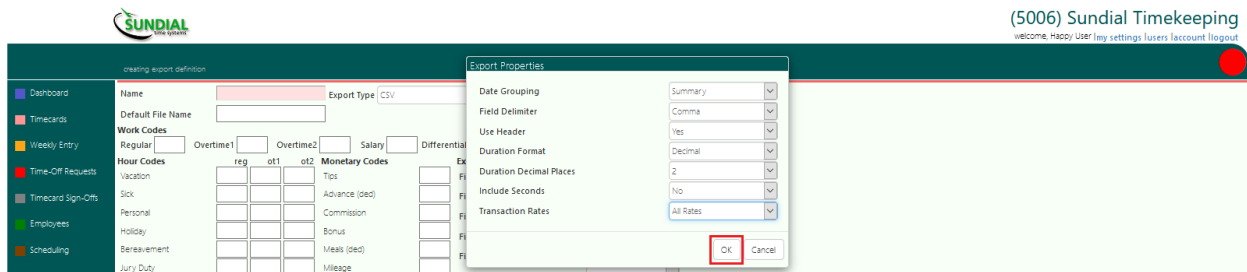
Duration Decimal Places : Using this dropdown, you can define the Duration decimal places (i.e. 2 or 4 decimal places)

Include Seconds : Using this dropdown, you can define where or not to include seconds

Transaction Rates : Using this dropdown, you can define Transaction Rates (i.e. None, Regular, Regular and Overtime 1 or All Rates)

Books

Once you do the required selections, you need to click on the “Ok” button as shown below



Work Codes : Using these fields you will be able to define the codes that are relevant for Regular, Overtime1, Overtime2, Salary and Differential

Hour Codes : Using these fields you can define the Hour Codes for each of the relevant items listed under the Hours Codes. Codes can be defined for the “Regular”, “Overtime1” and “Overtime2”. Overtime1 and Overtime2 will only be needed if the Overtime Participation is set to Full, or the Hours Type itself is set to be a Premium.

Monetary Codes : Using these fields you can define the Monetary Codes for each of the relevant items listed under the Monetary Codes.

Export Fields : These fields will be unique to each Export Type. Once an Export Type is selected, the available export fields for that type will be shown. Specify values or sources for each field that you need in your particular configuration. Some export fields may be required. When selecting a source, you can choose a value from the first dropdown and then select the related values to export using the next dropdown loaded as shown below (i.e. Once you choose “Employee” from the first dropdown, you can choose the related values from the next dropdown such as “First Name, Last” etc.)

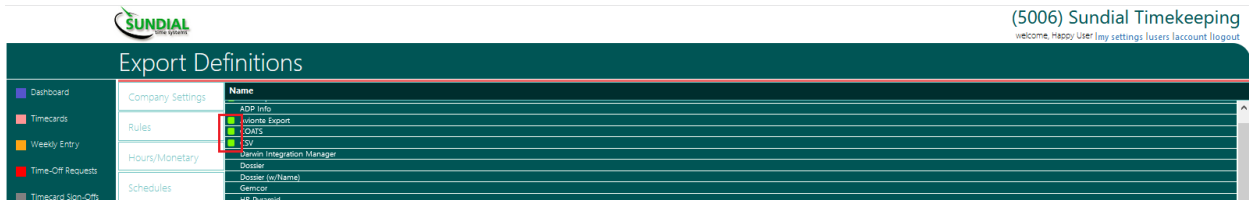
In addition to choosing fields within the system, you are also allowed to choose information from various other systems that are integrated (i.e. Payroll etc.)

Once the required information is selected, you need to click on the “Save” button for the system to save the record as shown below

Once this is saved, system will display the saved record as shown below

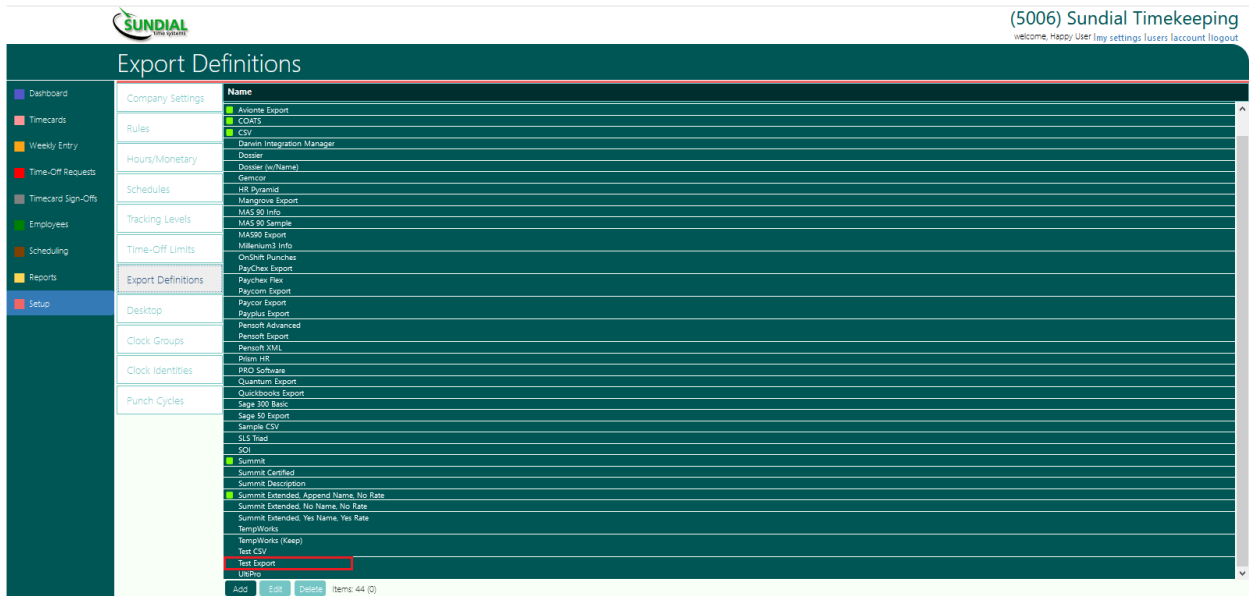
Category	Name
Company Settings	Avionte Export
Company Settings	COATS
Rules	CSV
Rules	Dorian Integration Manager
Hours/Monetary	Dossier
Hours/Monetary	Dossier (w/Name)
Schedules	Genisce
Schedules	HR Pyramid
Tracking Levels	Mangrove Export
Time-Off Limits	MAS90 Info
Time-Off Limits	MAS 50 Samples
Time-Off Limits	MAS90 Export
Time-Off Limits	Millennium Info
Time-Off Limits	OnDemand Punches
Time-Off Limits	PayChex Export
Export Definitions	Paychex Flex
Export Definitions	Paycom Export
Export Definitions	Paycov Export
Export Definitions	Payplus Export
Desktop	Pensort Advanced
Desktop	Pensort Export
Clock Groups	Pensort XML
Clock Identities	Pison HR
Clock Identities	PISO Software
Punch Cycles	Quantum Export
Punch Cycles	Quickbooks Export
Punch Cycles	Sage 50 Basic
Punch Cycles	Sage 10 Export
Punch Cycles	Sample CSV
Punch Cycles	SLS Trid
Punch Cycles	SOI
Punch Cycles	Summit
Punch Cycles	Summit Certified
Punch Cycles	Summit Description
Punch Cycles	Summit Extended Append Name No Rate
Punch Cycles	Summit Extended No Name No Rate
Punch Cycles	Summit Extended Yes Name Yes Rate
Punch Cycles	TempWorks
Punch Cycles	TempWorks (Keep)
Punch Cycles	Test CSV
Punch Cycles	Test Export
Punch Cycles	Unlpo

Note : When an Export Definition is assigned to a pay period, system will indicate it with a green dot as shown below



Editing “Export Definition”

In order to **edit** a record, you need to first **select** the record by clicking on it as shown below.



When clicked the selected line items will be shaded with a lighter complexion to help you differentiate it from the rest

(5006) Sundial Timekeeping
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Export Definitions

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

Category	Name
Company Settings	Avante Export
Rules	COATS
	CSV
	Domain Integration Manager
Hours/Monetary	Dossier
	Dossier (w/Name)
Schedules	Genacor
	HR Dynamid
Tracking Levels	Mangrove Export
	MAS 90 Info
	MAS 90 Sample
	MAS90 Export
Time-Off Limits	Millenium3 Info
	OnCall Punches
Export Definitions	PayChek Export
	Paychex Flex
	Paycom Export
Desktop	Paycor Export
	Payplus Export
	Pensoft Advanced
Clock Groups	Pensoft Export
	Pensoft XML
Clock Identities	Prism HR
	PRO Software
	Quantum Export
	Quickbooks Export
Punch Cycles	Sage 200 Basic
	Sage 50 Export
	Sample CSV
	SL5 Yield
	SOI
	Summit
	Summit Certified
	Summit Description
	Summit Extended, Append Name, No Rate
	Summit Extended, No Name, No Rate
	Summit Extended, Yes Name, Yes Rate
	TempWorks
	TempWorks (Keep)
	Text CSV
	Time Export
	LHD0

Add Edit Delete Items: 44 (1)

Once this is selected, you need to click on the "Edit" button as shown below

(5006) Sundial Timekeeping
welcome, Hsdy User | my settings | users | account | logout

Export Definitions

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

Category	Name
Company Settings	Avante Export
Rules	COATS
	CSV
	Domain Integration Manager
Hours/Monetary	Dossier
	Dossier (w/Name)
Schedules	Genacor
	HR Dynamid
Tracking Levels	Mangrove Export
	MAS 90 Info
	MAS 90 Sample
	MAS90 Export
Time-Off Limits	Millenium3 Info
	OnCall Punches
Export Definitions	PayChek Export
	Paychex Flex
	Paycom Export
Desktop	Paycor Export
	Payplus Export
	Pensoft Advanced
Clock Groups	Pensoft Export
	Pensoft XML
Clock Identities	Prism HR
	PRO Software
	Quantum Export
	Quickbooks Export
Punch Cycles	Sage 200 Basic
	Sage 50 Export
	Sample CSV
	SL5 Yield
	SOI
	Summit
	Summit Certified
	Summit Description
	Summit Extended, Append Name, No Rate
	Summit Extended, No Name, No Rate
	Summit Extended, Yes Name, Yes Rate
	TempWorks
	TempWorks (Keep)
	Text CSV
	Time Export
	LHD0

Add Edit Delete Items: 44 (1)

When you click on the “Edit” button the schedule will be opened in an editable form as shown below

SUNDIAL Timekeeping (5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Test Export edit export definition

Name: Test Export Export Type: CSV Export Properties

Default File Name: Test Export File

Work Codes: Regular TR Overtime1 TOT1 Overtime2 TOT2 Salary TS1 Differential TD1

Hour Codes	reg	ot1	ot2	Monetary Codes	Export Fields
Vacation	TVC	TVOT1	TVOT2	Tips	Field 1
Sick	TS	TSOT1	TSOT2	Advance (ded)	Field 2
Personal				Commission	Field 3
Holiday				Bonus	Field 4
Bereavement				Meals (ded)	Field 5
Jury Duty				Mileage	Field 6
Custom7				Reimbursements	Field 7
Custom8				Load	Field 8
Custom9				Uniform	Field 9
Worked - Sunday				Tips	Field 10
Level 11				Hourly rates	
Vacation x				Meeting Bonus	
Biweekly Staff				Piecework	
Regular				Sales Bonus	
Test Hour Type 1 Edited				New Type	
				New Test Monetary Type Edited	

Employee: [dropdown] First Name: [dropdown]

Text: [dropdown] Test Text: [dropdown]

None: [dropdown] (repeated for Fields 4-10)

Cancel

Note : “Save” button will be in a disabled state until such time the value shown is changed. Only once you make a change the “Save” button will be enabled

Once you “Edit”, you can click on the “Save” button to save it as shown below

SUNDIAL Timekeeping (5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Test Export edit export definition

Name: Test Export Edited Export Type: CSV Export Properties

Default File Name: Test Export File Edited

Work Codes: Regular TR Overtime1 TOT1 Overtime2 TOT2 Salary TS1 Differential TD1

Hour Codes	reg	ot1	ot2	Monetary Codes	Export Fields
Vacation	TVC	TVOT1	TVOT2	Tips	Field 1
Sick	TS	TSOT1	TSOT2	Advance (ded)	Field 2
Personal				Commission	Field 3
Holiday				Bonus	Field 4
Bereavement				Meals (ded)	Field 5
Jury Duty				Mileage	Field 6
Custom7				Reimbursements	Field 7
Custom8				Load	Field 8
Custom9				Uniform	Field 9
Worked - Sunday				Tip	Field 10
Level 11				Hourly rates	
Vacation x				Meeting Bonus	
Biweekly Staff				Piecework	
Regular				Sales Bonus	
Test Hour Type 1 Edited				New Type	
				New Test Monetary Type Edited	

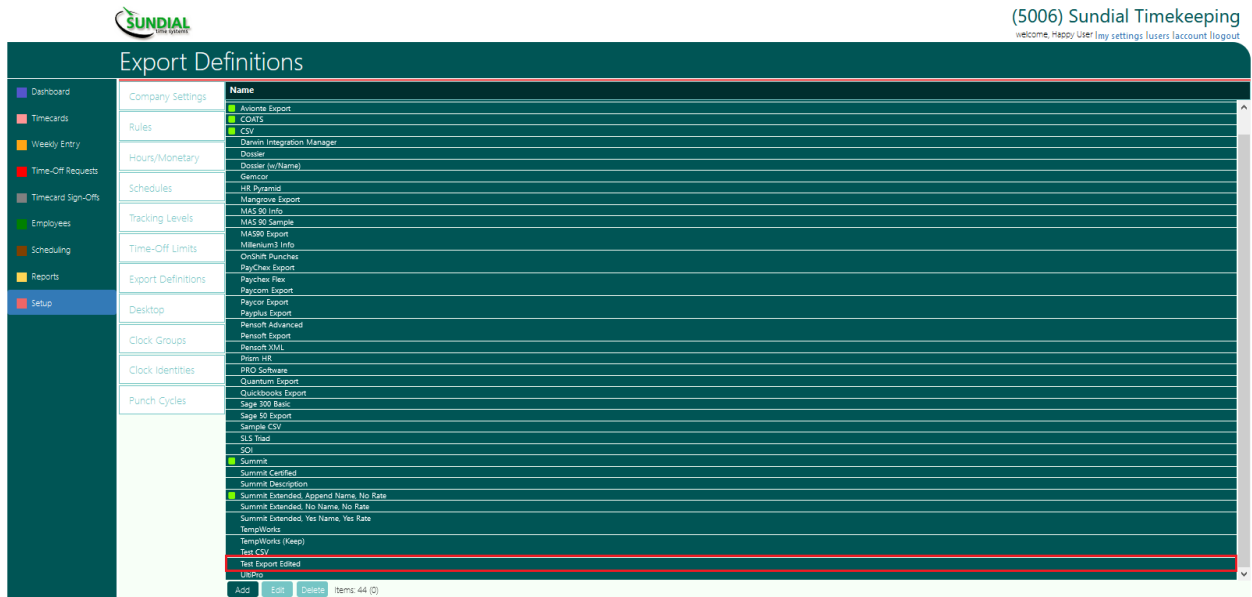
Employee: [dropdown] First Name: [dropdown]

Text: [dropdown] Test Text: [dropdown]

None: [dropdown] (repeated for Fields 4-10)

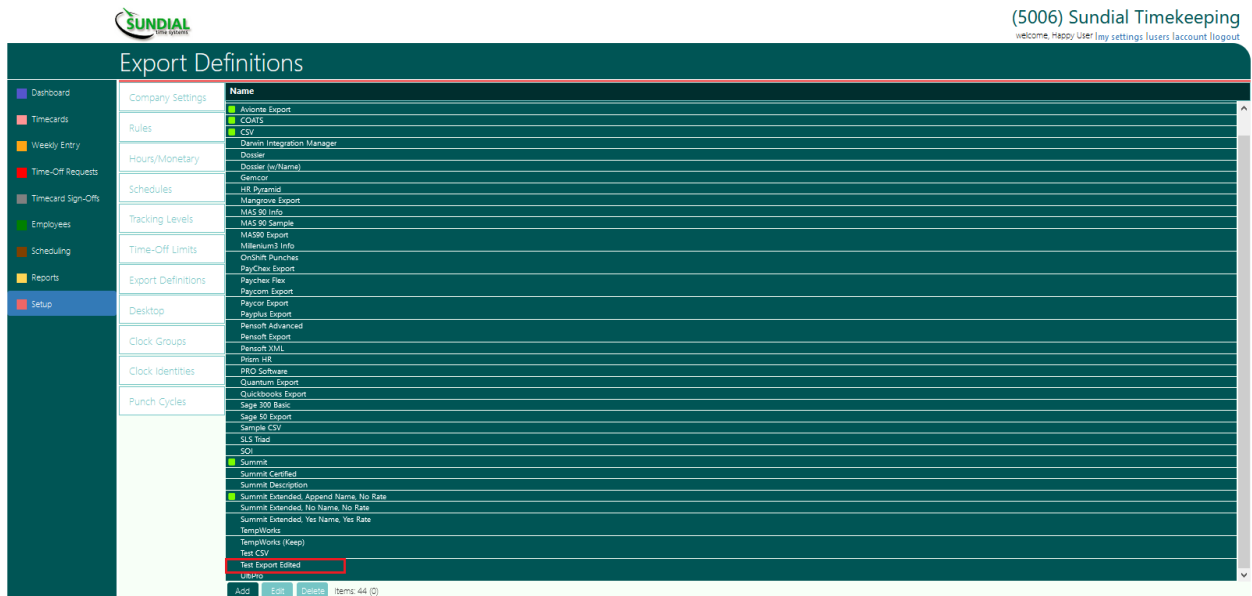
Save Cancel

Once you click on the **“Save”** button, system will save the changes and it will be displayed as shown below



Deleting “Export Definition”

In order to **“Delete”** a you need, you need to first select the **“Export Definition”** by clicking on it as shown below



Once you click on a **Export Definition** the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

(5006) Sundial Timekeeping
welcome, h300 User | my settings | users | account | logout

Schedules

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

Company Settings	Name	Type
Rules	Test Notifications	weekly
	3 Hour	custom (1 days)
	5 minute	weekly
	6:00 AM to Midnight	weekly
	7 - 3 Lockout	weekly
	7 to 3 w/ Auto Lunch	weekly
	8 - 4 Lockout	weekly
Schedules	8 to 5 w/ Auto Lunch	weekly
	ashar 8:00 to 10:00 week days	weekly
	Ashar Ul Islam	weekly
	Brenda 8:00 to 14:00 week days	weekly
	Damen 09:00 - 17:00	weekly
	Dustin	weekly
Tracking Levels	General	weekly
	Imran Khan	weekly
	Jan 8:30 to 1:30 week day	weekly
	Khan 2:00pm to 10:00 pm	weekly
Time-Off Limits	Lunches and Breaks	weekly
	reason 10am-6pm	weekly
	microsoft HR 4-12am	weekly
Export Definitions	Rounding	weekly
	Shift A Jan 2017-1	weekly
	Stacy	weekly
	Tony 6am to 4:30pm	weekly
	Test Midnight	custom (1 days)
Desktop	Test NewCity	weekly
	test-branches Export	weekly
Clock Groups	Tim Only	weekly
Clock Identities	week days 0 to 4	weekly
Punch Cycles	Weekly	weekly

Add Edit **Delete** Items: 30 (7) Clone

Once selected, you can click on the **“Delete”** button as shown below

(5006) Sundial Timekeeping
welcome, h300 User | my settings | users | account | logout

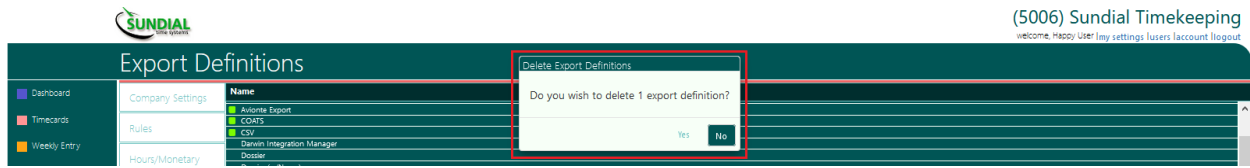
Export Definitions

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports
- Setup

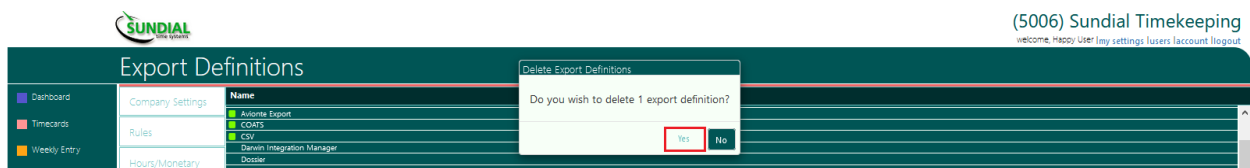
Company Settings	Name	Type
Rules	Avante Export	
	COATS	
	CSV	
	Domain Integration Manager	
Hours/Monetary	Dossier	
	Dossier (w/Name)	
Schedules	Genstar	
	HR Dynamid	
	Mangiova Export	
Tracking Levels	MAS 90 Info	
	MAS 90 Sample	
Time-Off Limits	MAS90 Export	
	Millenium3 Info	
	OnDHR Punches	
	PayChek Export	
Export Definitions	Paychev Flex	
	Paycom Export	
	Paycom Export	
	Payplus Export	
Desktop	Pensoft Advanced	
	Pensoft Export	
	Pensoft XML	
Clock Groups	Prism HR	
Clock Identities	PRO Software	
	Quantum Export	
Punch Cycles	Quickbooks Export	
	Sage 100 Basic	
	Sage 100 Export	
	Sample CSV	
	SLS Trad	
	SOI	
	Summit	
	Summit Certified	
	Summit Description	
	Summit Extended Append Name, No Rate	
	Summit Extended, No Name, No Rate	
	Summit Extended, Yes Name, Yes Rate	
	TempWorks	
	TempWorks (Keep)	
	Test CSV	
	Test Export Lines	
	USDO	

Add Edit **Delete** Items: 44 (1)

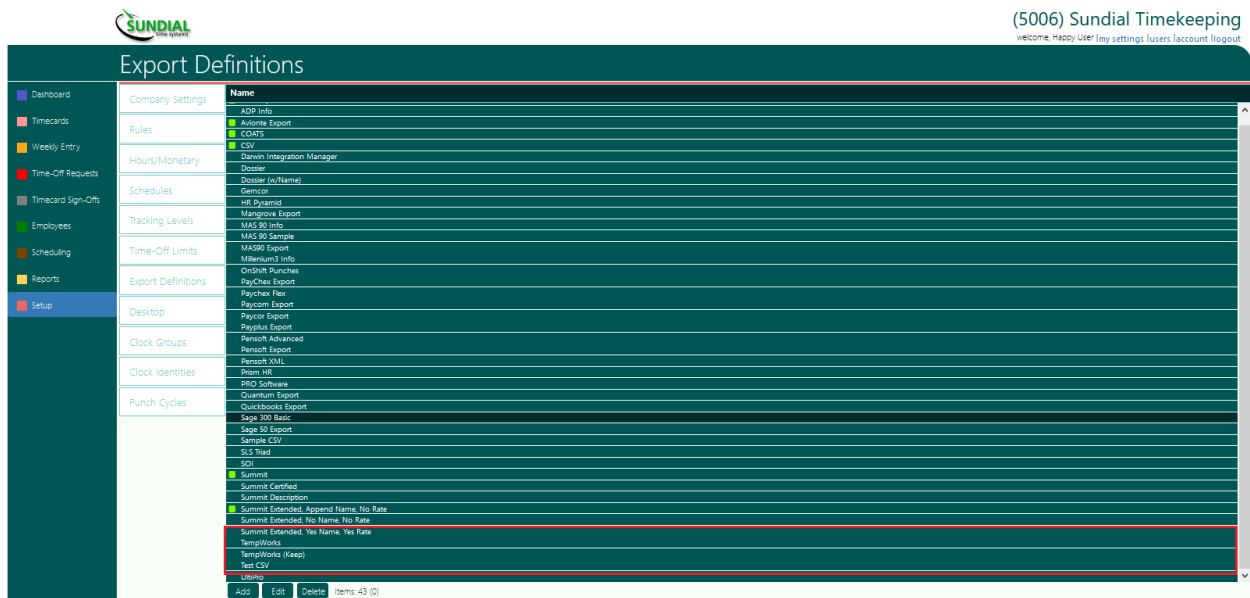
Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click “Yes” on this pop-up/overlay as shown below



Once you click “OK” the system will then delete the selected rule as shown below



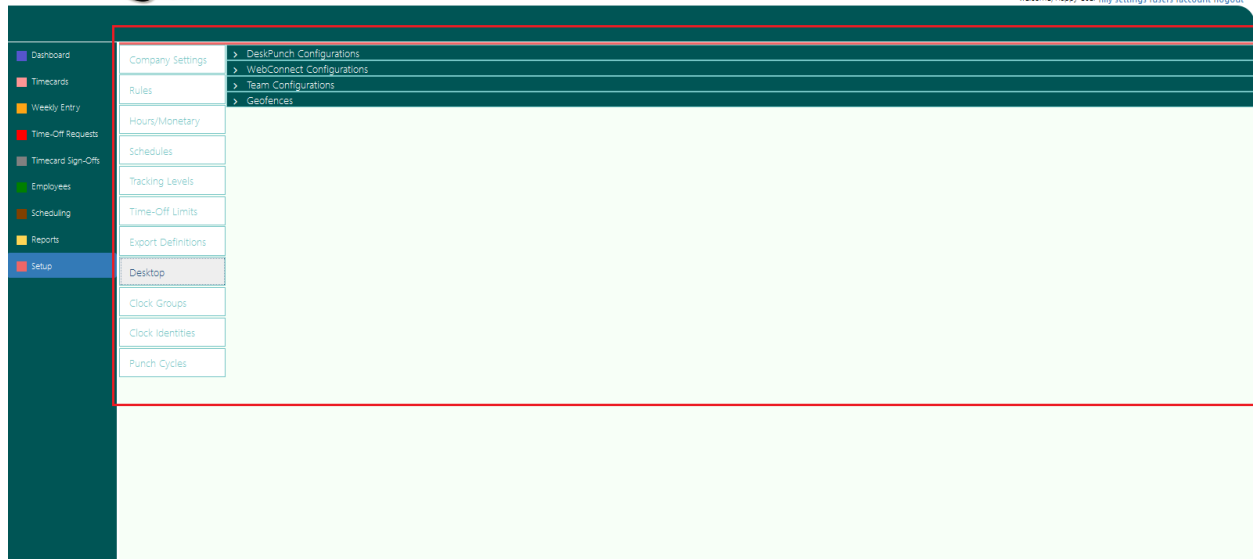
5.11.10. Desktop

Going into “Desktop”

In order to get in to the “**Desktop**” you need to click on “**Desktop**” under the “**Setup**” section as shown below

The screenshot shows the Sundial Timekeeping web application interface. The top right corner displays the user information: "(5006) Sundial Timekeeping" and "welcome, MADDY USER | my settings | user's account | logout". The main header is "Export Definitions". On the left, a sidebar menu is visible with the "Setup" section highlighted. Under "Setup", the "Desktop" option is selected and highlighted with a red box. The main content area shows a list of export definitions with columns for "Name" and "Status". The list includes various export types such as "App Info", "Avionte Export", "COATS", "CSV", "Darwin Integration Manager", "Dossier", "Dossier (w/Name)", "Genitor", "HR Pyramid", "Mangrove Export", "MAS 90 Info", "MAS 90 Sample", "MAS90 Export", "Mileburn3 Info", "OnSite Punches", "PayChek Export", "PayChek File", "Paycom Export", "Paycor Export", "Playplus Export", "Pensath Advanced", "Pensath Export", "Pensath XML", "Prism HR", "PRO Software", "Quantum Export", "Quickbooks Export", "Saga 50 Info", "Saga 50 Export", "Sample CSV", "SLS Trad", "SOL", "Summit", "Summit Certified", "Summit Description", "Summit Extended, Append Name, No Rate", "Summit Extended, No Name, No Rate", "Summit Extended, Yes Name, Yes Rate", "TempWorks", "TempWorks (Keep)", and "Text CSV". At the bottom of the list, there are buttons for "Add", "Edit", and "Delete", along with a status indicator "Items: 43 (0)".

Once you click on “**Desktop**” section, you will be navigated in to the “**Desktop**” page as shown below



Understanding the “Desktop”

Under the desktop area you have the following configurations

- DeskPunch Configurations
- WebConnect Configurations
- Team Configurations
- Geofences

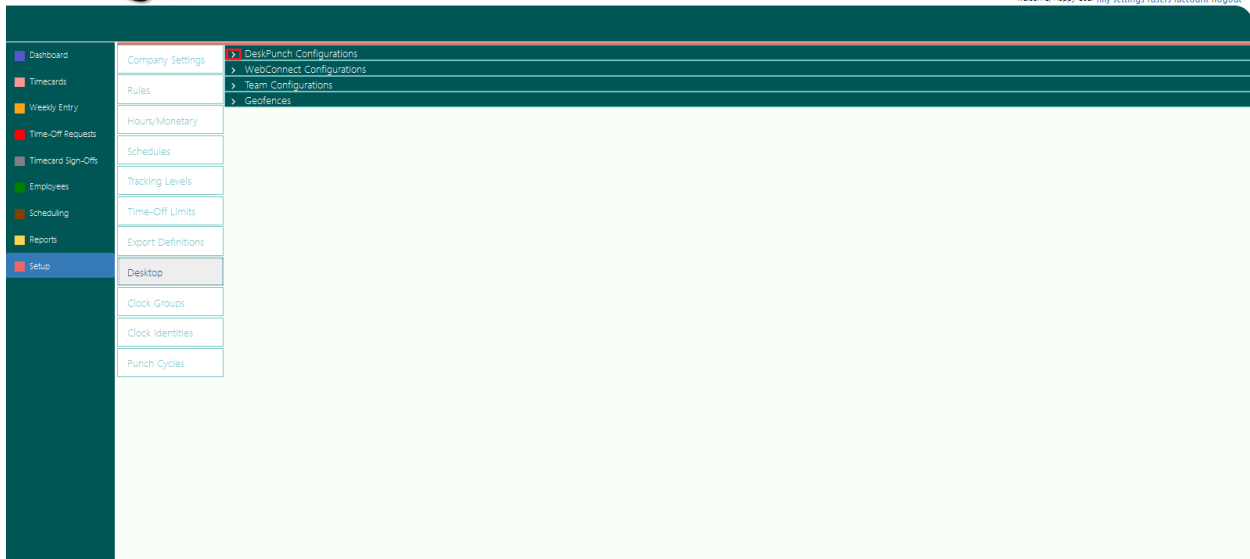
DeskPunch

Understanding the DeskPunch Configurations

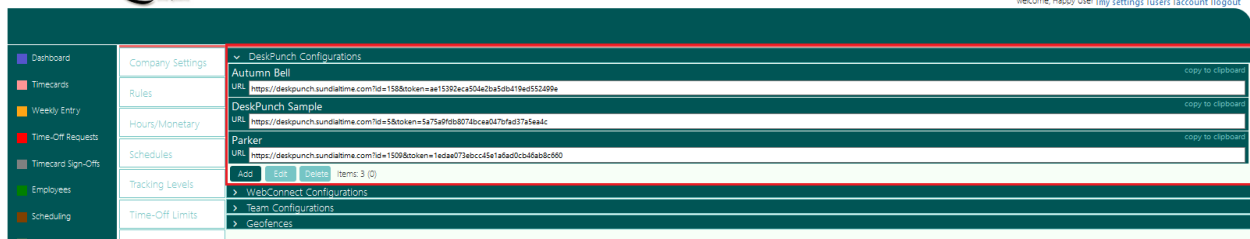
“DeskPunch” is a Kiosk type of software for Punching and Status.

In order to get into the “**DeskPunch**” you need to expand the “**DeskPunch**” section by clicking on it as shown below.

Every DeskPunch Configuration will have a unique URL field displayed right below the configuration name. This is the URL needed to open the DeskPunch software with this particular configuration. This URL can be copied and used anywhere needed, including making it the Target of an Internet Shortcut, included in an email or other electronic message.

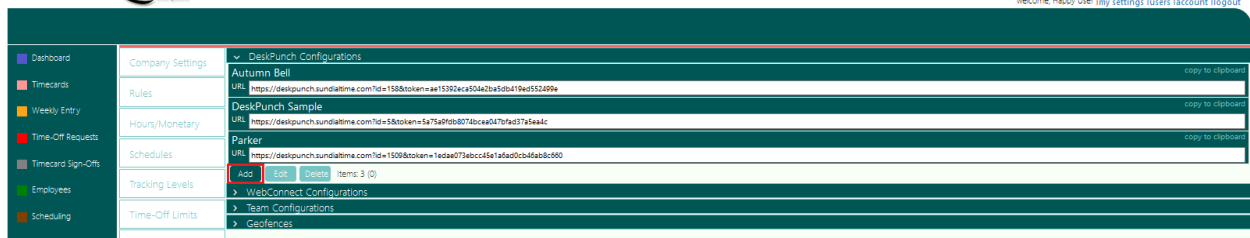


Once you click on this section, system will expand the section as shown below



Adding DeskPunch Configurations

In order to “Add” a DeskPunch Configuration you need to click on the “Add” button as shown below



Once you click on the “Add” button, system will display the below screen as shown below

The screenshot shows the 'New DeskPunch Configuration' interface. The form contains the following fields and options:

- Name:** Text input field.
- Time Zone:** Dropdown menu (currently set to '(UTC) Coordinated Universal Time').
- Full Name Format:** Dropdown menu (currently set to 'First Last').
- Password Required:** Checkbox.
- Hide Employee Time:** Checkbox.
- Punch Types Allowed:** A group of checkboxes for 'Auto Punch', 'Switch', 'In/Out', 'Lunch', and 'Break'.
- Tracking Levels:** A list of dropdown menus for 'Department', 'Customer', 'Operation', 'Class / Grant', 'Region', 'Grouping', 'Location', and 'Jobs', each followed by an 'Is Editable' checkbox.
- Filters:** A section with a 'Filters' checkbox and a 'show inactive items' link, and an 'Edit Filters' button.

Understanding the New DeskPunch Configuration Screen

Name : Using this field you can enter the name of the DeskPunch configuration

[Dropdown]Time Zone : Using this dropdown, you can select the Time Zone that is relevant for the new DeskPunch configuration

[Dropdown]Full Name Format : Using this dropdown, you can define the Full Name Format to be used for the DeskPunch configuration

[Checkbox] Password Required : Using this checkbox, you can configure if a password is required for this DeskPunch. If a password is required, this needs to be set up in the in the employee record section

[Checkbox] Hide Employee Time : Using this checkbox, you can choose if the employee time is hidden from his/her co-worker. If this is checked, the total hours worked by each employee will not be included on the employee list display (i.e. coworkers)

Punch Types Allowed : using these checkboxes you can check in the punch types that are allowed for the configured DeskPunch configuration.

[Checkbox] Auto Punch : If this checkbox is checked, system will allow Auto punch

[Checkbox] Switch : If this checkbox is checked, system will allow Switch punch

[Checkbox] In/Out : If this checkbox is checked, system will allow In/Out punch

[Checkbox] Lunch : If this checkbox is checked, system will allow Lunch punch

[Checkbox] Break : If this checkbox is checked, system will allow Break punch

Tracking Levels : Using these dropdowns you can assign the tracking levels that are required for this DeskPunch configuration. Furthermore, for each of these Tracking Levels, there is a checkbox next to its dropdown. This will be unchecked by default. When you check these checkbox, it will allow the added tracking levels to be editable at a punch level

There are 8 different tracking levels available. The names of each level will vary, depending on the names provided in Setup >> Tracking Levels.

Filters : Using the filters, you can add the employees who can use the configured DeskPunch. This can be chosen either at a tracking level, or choosing as individual employees or a combination of both.

Furthermore there is a checkbox in this section to show the inactive users in the filters. This will be unchecked by default and when this is checked the system will display the inactive users in the filters section.

Once the required information is added, you can click on the “**Save**” button as shown below

The screenshot displays the 'New DeskPunch Configuration' page in the Sundial Timekeeping system. The page title is 'New DeskPunch Configuration' with a sub-header 'creating deskpunch configuration'. The interface is divided into several sections:

- Header:** Sundial logo on the left, and '(5006) Sundial Timekeeping' with user information on the right.
- Navigation Sidebar:** Includes Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup.
- Main Configuration Area:**
 - Name:** 'test DeskPunch'
 - Time Zone:** '(UTC) Coordinated Universal Time'
 - Full Name Format:** 'First Last'
 - Punch Types Allowed:** Auto Punch, Switch, In/Out, Lunch, Break (all checked).
 - Tracking Levels:** A list of 8 levels (Department, Customer, Operation, Class / Grant, Region, Grouping, Location, Jobs) with dropdown menus and 'Is Editable' checkboxes.
 - Filters:** A section with a 'Filters' checkbox (unchecked) and a 'show inactive items' checkbox (unchecked). Below it is an 'Edit Filters' button and a note '* = inactive/deactivated items'.
- Footer:** A 'Save' button and a 'Cancel' button.

Once you click on “Save” system the system will save the DeskPunch configuration as shown below

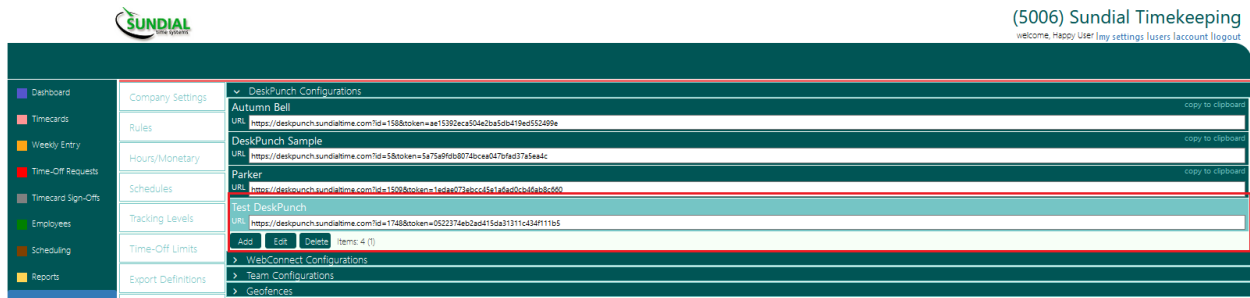
The screenshot shows the Sundial Timekeeping interface for user (5006). The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is titled 'Company Settings' and includes a sub-section for 'DeskPunch Configurations'. This section lists several configurations: Autumn Bell, DeskPunch Sample, Parker, and Test DeskPunch. Each configuration entry includes a URL and a 'copy to clipboard' link. The 'Test DeskPunch' entry is highlighted with a red box. Below the list are buttons for 'Add', 'Edit', and 'Delete', with a note that there are 4 items. Further down, there are expandable sections for 'WebConnect Configurations', 'Team Configurations', and 'Geofences'. Other settings like Desktop, Clock Groups, Clock Identities, and Punch Cycles are also visible.

Editing a DeskPunch Configuration

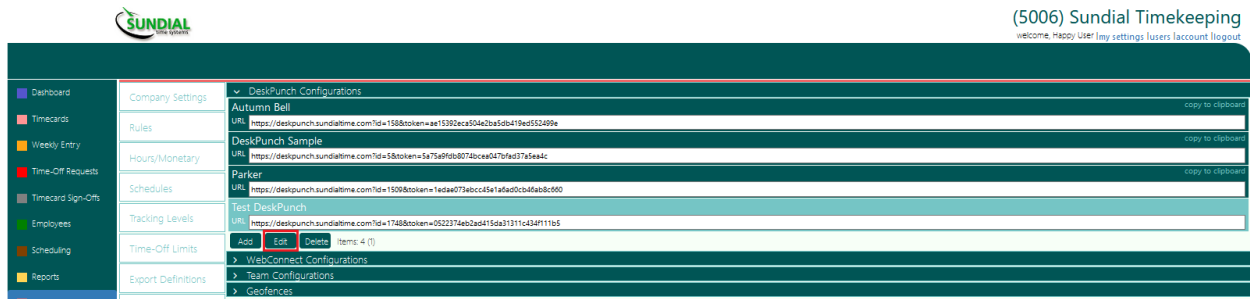
In order to “Edit” DeskPunch configurations, you need to first select the DeskPunch configuration by clicking on it as shown below

This screenshot is identical to the one above, showing the 'DeskPunch Configurations' section. In this view, the 'Test DeskPunch' configuration is selected, and the 'Edit' button next to it is highlighted with a red box, indicating the next step in the editing process.

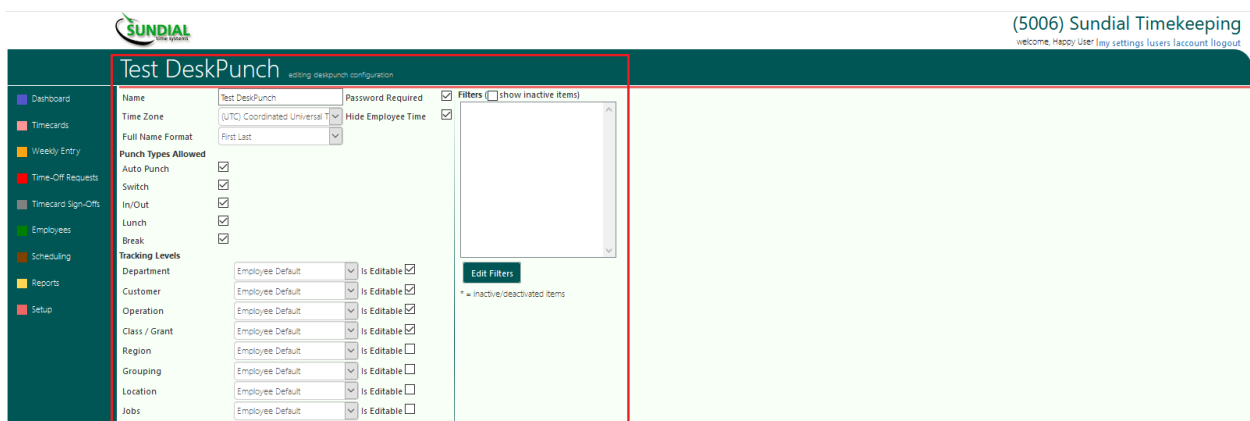
Once you click on a DeskPunch configuration the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



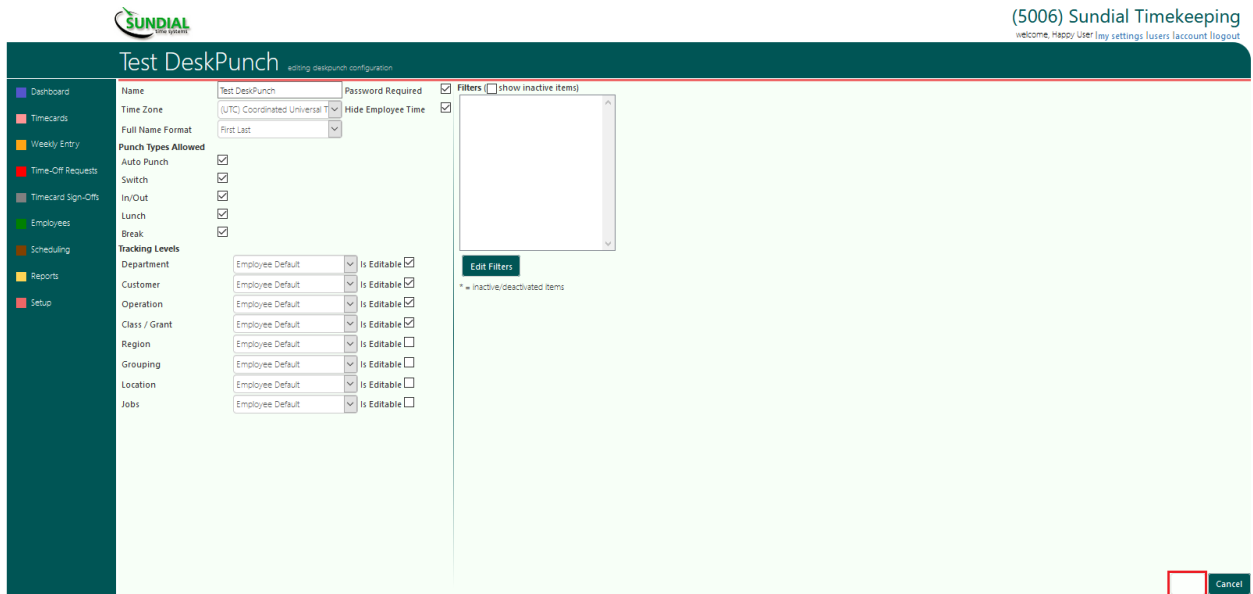
Now you need to click on the “Edit” button as shown below



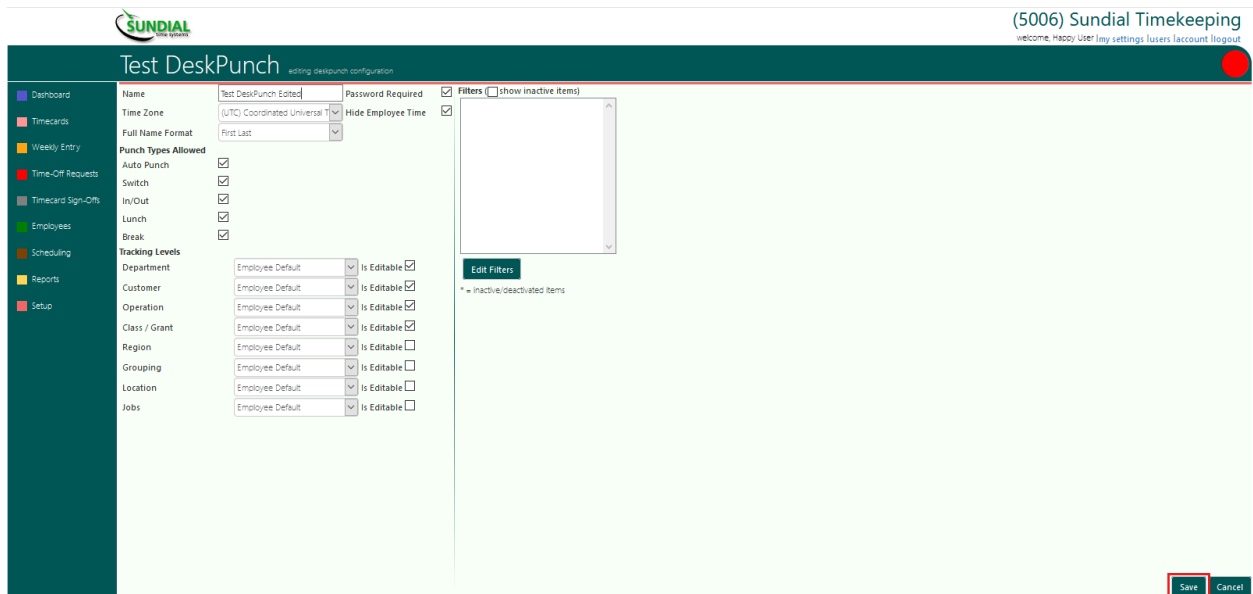
Once the “Edit” button is clicked the system will load the DeskPunch configurations in an editable mode as shown below. You will now be able to make any changes to existing rule values.



Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below



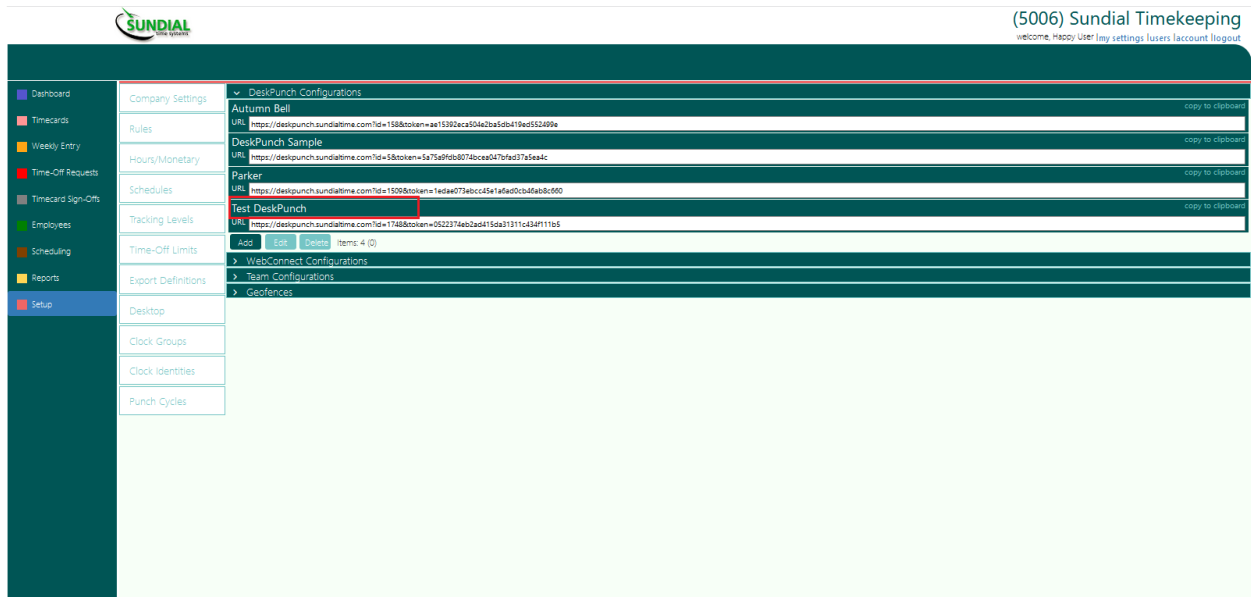
Once you make any changes the system will enable the “Save” button as shown below.



Once you click on the “Save” button the system will save any changes done

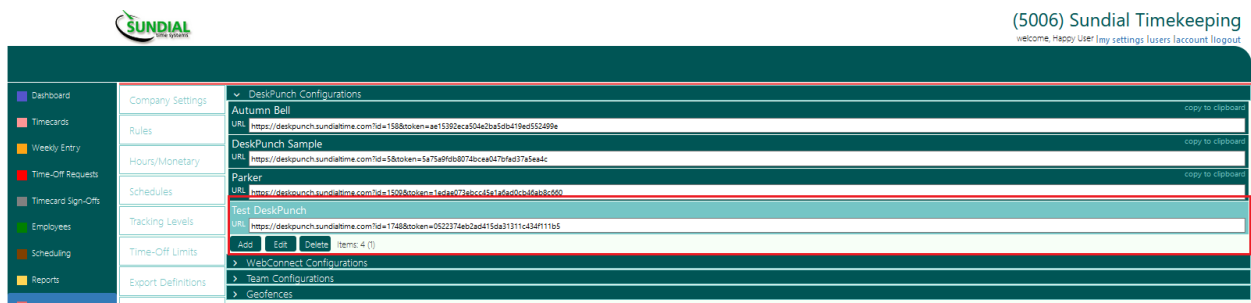
Deleting a DeskPunch Configuration

In order to “Delete” DeskPunch configuration, you need to first select the “DeskPunch” rule by clicking on it as shown below



The screenshot shows the Sundial Timekeeping interface. The top right corner displays "(5006) Sundial Timekeeping" and a user welcome message. The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is titled "DeskPunch Configurations" and lists several configurations: Autumn Bell, DeskPunch Sample, Parker, and Test DeskPunch. Each configuration includes a URL and a "copy to clipboard" link. The "Test DeskPunch" configuration is highlighted with a red box. Below the list, there are buttons for "Add", "Edit", and "Delete", and a note "Items: 4 (0)".

Once you click on a DeskPunch configuration the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

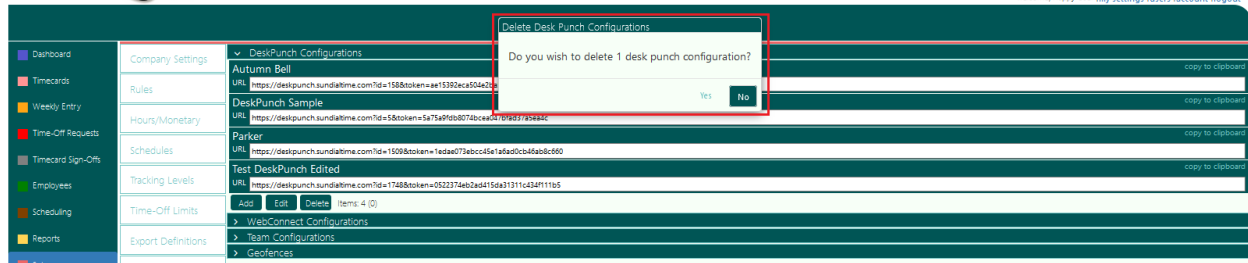


The screenshot shows the Sundial Timekeeping interface. The top right corner displays "(5006) Sundial Timekeeping" and a user welcome message. The left sidebar contains navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is titled "DeskPunch Configurations" and lists several configurations: Autumn Bell, DeskPunch Sample, Parker, and Test DeskPunch. Each configuration includes a URL and a "copy to clipboard" link. The "Test DeskPunch" configuration is highlighted with a lighter background. Below the list, there are buttons for "Add", "Edit", and "Delete", and a note "Items: 4 (0)".

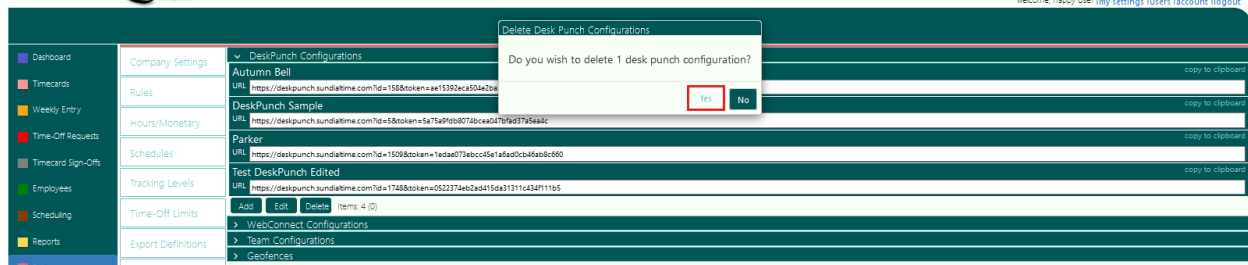
Now you need to click on the “Delete” button as shown below



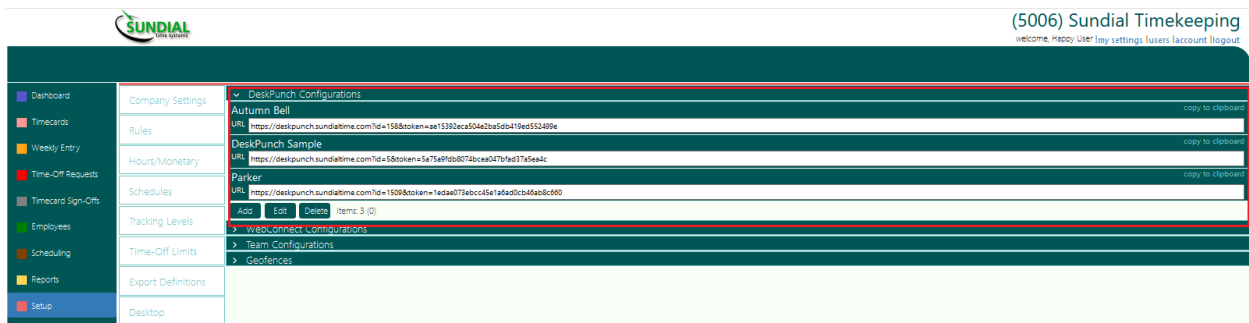
Once you click on **“Delete”** the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click **“OK”** on this pop-up/overlay as shown below



Once you click “Ok” the system will then delete the selected configuration as shown below

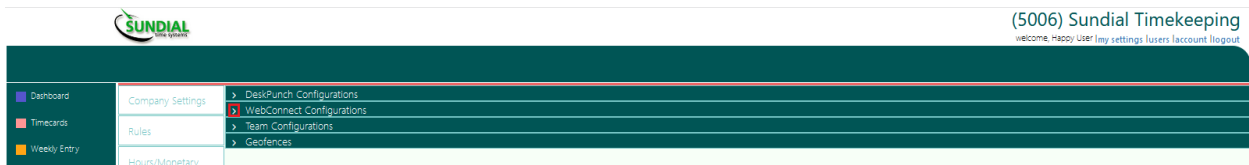


WebConnect

Understanding the WebConnect Configurations

“WebConnect” is an Employee Self-Service Product

In order to get into the “WebConnect Configurations” you need to expand the “WebConnect Configurations” section by clicking on it as shown below



Once you click on this section, system will expand the section as shown below

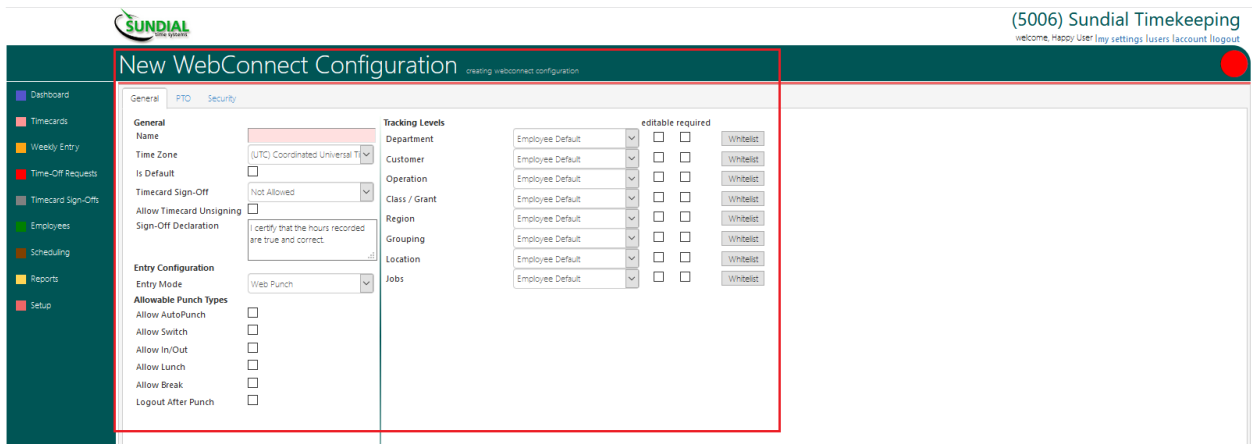


Adding a WebConnect Configuration

In order to “Add” a WebConnect Configuration you need to click on the “Add” button as shown below



Once you click on the “Add” button, system will display the below screen as shown below



Understanding the WebConnect Configuration Screen “General Tab”

The WebConnect Configuration Screen “General Tab” is shown below

General

Name : Using this field you can enter the name of the WebConnect configuration

[Dropdown] Time Zone : Using this dropdown, you can select the Time Zone that is relevant for the new DeskPunch configuration

[Checkbox] Is Default : Using this checkbox, you can define if this is a company default or not. By default this will be unchecked and when you check this, it will make this WebConnect configuration a company default

[Dropdown] Timecard Sign-Off : Using this dropdown, you can choose the Time card signing privileges to be allowed for the employees as part of the WebConnect configuration (Note : If you allow employees to sign their current time period, they will not be allowed to submit any additional punch records. Therefore, it is recommended to use previous period unless there is a compelling reason to change that setting)

[Checkbox] Allow Timecard Unsigning : Using this checkbox, you can define if the employees are allowed to unsign if they sign it by mistake. This will be unchecked by default and when you check this, it will allow employees to unsign any signed records

Sign-Off Declaration : Using this field, you can add a custom declaration that you wish to add as part of an employee's sign off declaration. This can be configured as part of the organizational requirements.

Entry Configuration

[Dropdown] Entry Mode : Using this dropdown, you can define the entry mode for the punches (i.e. Web Punch, Time Entry, Shift Entry)

Allowable Punch Types : using these checkboxes you can check in the punch types that are allowed for the configured DeskPunch configuration.

[Checkbox] Allow Auto Punch : When this box is marked, the system will present the Auto punch type.

[Checkbox] Allow Switch : When this box is marked, the system will present the Switch punch type.

[Checkbox] Allow In/Out : When this box is marked, the system will present both Clock In and Clock Out punch types.

[Checkbox] Allow Lunch : When this box is marked, the system will present both Lunch Leave and Lunch Return punch types.

[Checkbox] Allow Break : When this box is marked, the system will present both Break Leave and Break Return punch types

[Checkbox] Logout After Punch : If this checkbox is checked, the system will automatically log the user out of WebConnect after a punch is submitted.

Tracking Levels : Using these dropdowns you can assign the tracking levels that are required for this DeskPunch configuration.

Furthermore, for each of these Tracking Levels, there are two checkboxes next to its dropdown. This will be unchecked by default.

Editable : If you check this, the tracking levels will be allowed to be edited at a punch level

Required : If you check this, then it will be mandatory to have a selection other than “None” for each punch.

There are 8 different tracking levels available. The names of each level will vary, depending on the names provided in Setup >> Tracking Levels.

Whitelist : Using whitelisting you can select the whitelisted items from each of the tracking levels. Whitelisting the Tracking Level Items allows you to limit the choices that Employees can make while clocking. Since each configuration has its own Whitelist, individual groups of employees can have only the Tracking Level Items available that are useful to them.

Understanding the WebConnect Configuration Screen “PTO Tab”

The WebConnect Configuration Screen “PTO Tab” is shown below

(5006) Sundial Timekeeping
welcome, h850 User | my settings | users | account | logout

New WebConnect Configuration creating webconnect configuration

General PTO Security

Time-Off Requests

Limit PTO Request Amount To Available

Early PTO Request Allowed

Usable Areas

Usable Areas	Punches	Time-Off Requests
Vacation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sick	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Personal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Holiday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bereavement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Test Hour Type 1 Edited	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Time-Off Requests

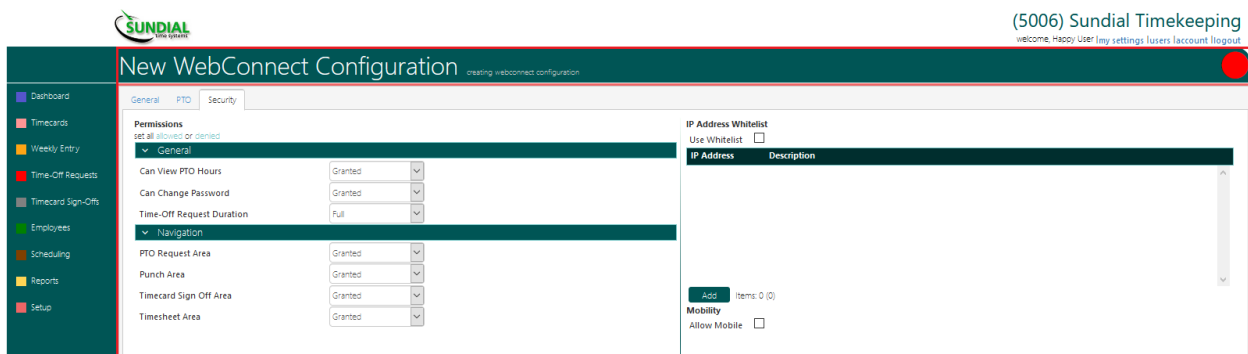
[Checkbox] Limit PTO Request Amount To Available : Using this checkbox, you can limit the PTO request amount to the available limit. If this box is unchecked, then employees will be able to request hours beyond their available balance

[Dropdown] Early PTO Request Allowed : Using this dropdown, you can choose the configurations on allowing early PTO Requests. (i.e. you can choose from Today, Current Pay Period and Previous Pay Period)

Usable Areas : Using these checkboxes, you can define which hours types are visible in the WebConnect software. Punches area refers to the hours types that can be chosen when filling in a Shift Entry timesheet. In order for the “Accrual Balances” selection to show values, the hours type must be allowed in the Punches area AND the hours type must be included in the employees’ Accrual hours types. Time Off Request area refers to which Hours Types the employee is able to specify when making a Time Off Request.

Understanding the WebConnect Configuration Screen “Security Tab”

The WebConnect Configuration Screen “Security Tab” is shown below



The screenshot displays the 'New WebConnect Configuration' interface, specifically the 'Security' tab. The interface includes a navigation menu on the left with options like Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is divided into 'Permissions' and 'IP Address Whitelist' sections. The 'Permissions' section is further divided into 'General' and 'Navigation' sub-sections. The 'General' section includes settings for 'Can View PTO Hours', 'Can Change Password', and 'Time-Off Request Duration'. The 'Navigation' section includes settings for 'PTO Request Area', 'Punch Area', 'Timecard Sign Off Area', and 'Timesheet Area'. The 'IP Address Whitelist' section includes a checkbox for 'Use Whitelist' and a table with columns for 'IP Address' and 'Description'. The table currently shows 0 items. There is also a 'Mobility' section with an 'Allow Mobile' checkbox.

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

New WebConnect Configuration

General PTO Security

Permissions
set all allowed or denied

General

Can View PTO Hours	Granted
Can Change Password	Granted
Time-Off Request Duration	Full

Navigation

PTO Request Area	Granted
Punch Area	Granted
Timecard Sign Off Area	Granted
Timesheet Area	Granted

IP Address Whitelist
Use Whitelist

IP Address	Description
Add Items: 0 (0)	

Mobility
Allow Mobile

Permissions

[Bulk Update link]Set All (Approved or Denied) : Using this link you can set all the option selections to either “Allowed” or “Denied”

General

[Dropdown] Can View PTO Hours : Using this dropdown, you can either grant access or Deny access for employees to view their Available Accrual balances.

[Dropdown] Can Change Password : Using this dropdown, you can either Grant or Deny access for employees to change password

[Dropdown] Time-Off Request Duration : Using this dropdown, you can set the access on the Time-off request duration field. Denying this permission requires that the employee only request Time Off in the Default Duration amount of hours

Navigation

[Dropdown] PTO Request Area : Using this dropdown, you can either grant access or Deny access for employees to PTO Request Area

[Dropdown] Punch Area : Using this dropdown, you can either grant access or Deny access for employees to Punch Area

[Dropdown] Timecard Sign Off Area : Using this dropdown, you can either grant access or Deny access for employees to Timecard Sign Off Area

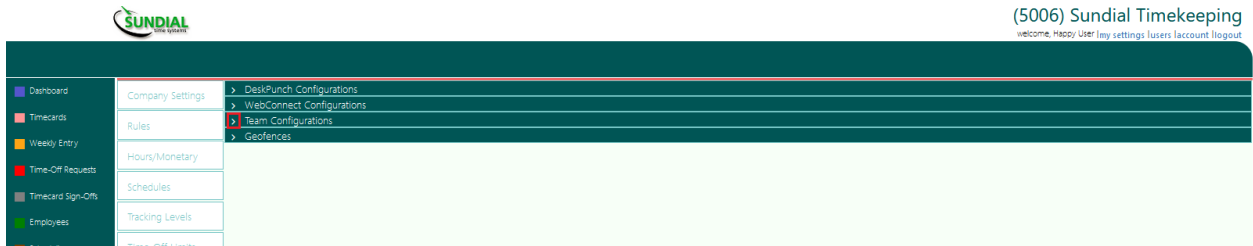
[Dropdown] Timesheet Area : Using this dropdown, you can either grant access or Deny access for employees to Timesheet Area

Teams

Understanding the Team Configurations

This is tool for managers and supervisors to apply a group punch for several users simultaneously

In order to get into the “**Team Configurations**” you need to expand the “**Team Configuration**” section by clicking on it as shown below



Once you click on this section, system will expand the section as shown below



Adding a Team Configurations

In order to “**Add**” a Team Configuration you need to click on the “**Add**” button as shown below



Once you click on the “Add” button, system will display the below screen as shown below

(5006) Sundial Timekeeping
welcome, Hady User | my settings | users | account | logout

New Team Configuration

creating team configuration

General

Name

Punch Types Allowed

Auto Punch

Switch

In/Out

Lunch

Break

Tracking Levels

Department	Employee Default	Is Editable <input type="checkbox"/>
Customer	Employee Default	Is Editable <input type="checkbox"/>
Operation	Employee Default	Is Editable <input type="checkbox"/>
Class / Grant	Employee Default	Is Editable <input type="checkbox"/>
Region	Employee Default	Is Editable <input type="checkbox"/>
Grouping	Employee Default	Is Editable <input type="checkbox"/>
Location	Employee Default	Is Editable <input type="checkbox"/>
Jobs	Employee Default	Is Editable <input type="checkbox"/>

Team Members show inactive items

* Inactive/Deactivated Items

Team Supervisors

Understanding the Team Configuration Screen

General

Name : Using this field you can provide a team name for the Team Configuration

Punch Types Allowed : using these checkboxes you can specify which punch types are available to the Team application.

[Checkbox] Auto Punch : When this box is marked, the system will present the **Auto** punch type in the Teams application.

[Checkbox] Switch : When this box is marked, the system will present the **Switch** punch type in the Teams application.

[Checkbox] In/Out : When this box is marked, the system will present the **Clock In** and **Clock Out** punch types in the Teams application.

[Checkbox] Lunch : When this box is marked, the system will present the **Lunch Leave** and **Lunch Return** punch types in the Teams application.

[Checkbox] Break : When this box is marked, the system will present the **Break Leave** and **Break Return** punch types in the Teams application.

Tracking Levels : Using these dropdowns you can assign the tracking levels that are required for this DeskPunch configuration. Furthermore, for each of these Tracking Levels, there is a checkbox next to its dropdown. This will be unchecked by default. When you check these checkboxes, it will allow the added tracking levels to be editable at a punch level

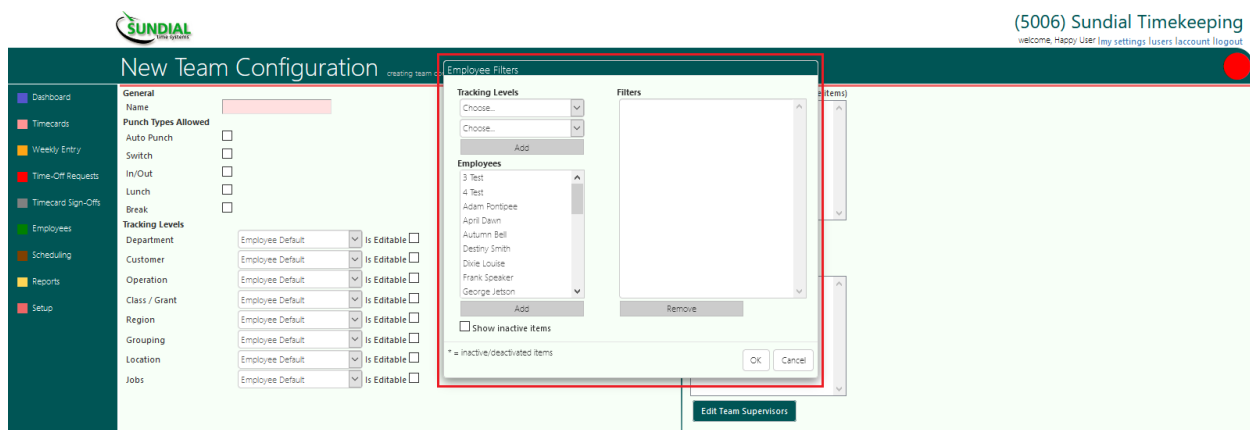
You can enable any of the 8 available tracking levels. Their names will vary depending on your specific configuration. Tracking Levels are managed in Setup >> Tracking Levels.

Team Members

Team Members are the employees that are available to the Supervisor when using the Team application.

[Checkbox] Show inactive items : This will be unchecked by default and when this is checked the system will display the inactive users in the filters section.

Edit Team Members : Using this button, you will be able to edit team members
Once this button is clicked, system will display a pop-up/overlay as shown below



Understanding the Employee Filter

An empty Employee Filter is treated as unfiltered, meaning that all employees are included in the result.

Tracking Levels : Using this dropdown, you can add tracking levels for the employee filter. Once a Level is selected, choose an Item from the level. Every employee assigned to the selected Item(s) will be included in the configuration.

Employees : Using this, you can choose the individual employee(s) to add. These employees are in addition to any employees included through Tracking Item assignments above. You can simply click on each employee and add by clicking on the “Add” button.

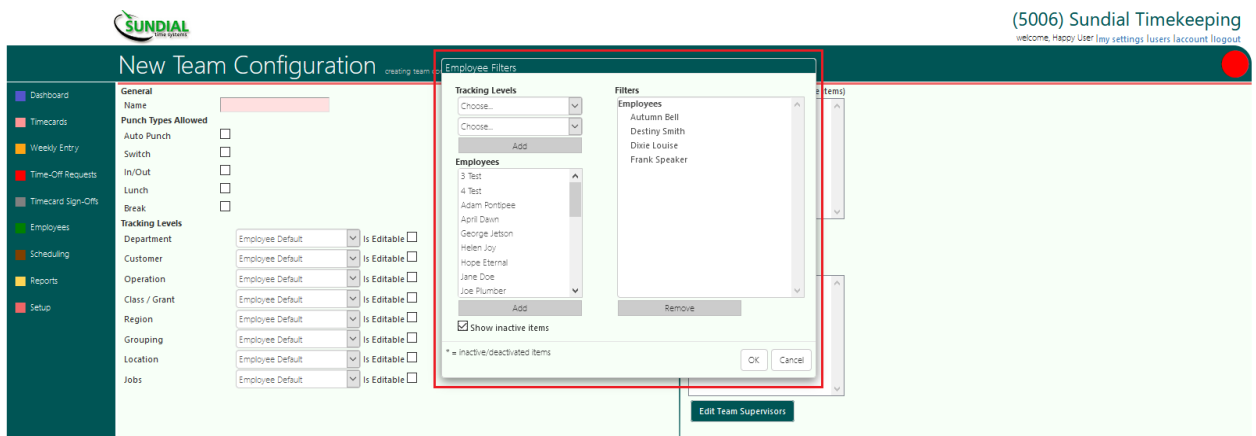
Furthermore the system allows you to select multiple employees using 3 different types of selects which involves a combination of keys as shown below. Currently the system supports the following multi select options.

- **Shift + Click** (Selects Last Click to Current Click)
- **Control + Click** (Adds or Removes Clicked Selection)
- **Control+Shift + Click** (Adds Group from Previous Click to Current Click)

[Checkbox] Show inactive items : This will be unchecked by default. When you check this checkbox, system will display inactive employees

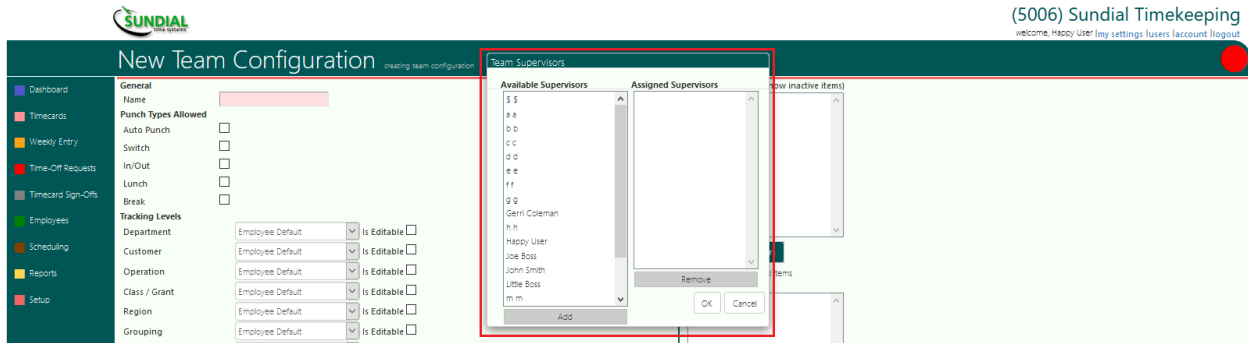
[Button]Remove : Using the remove button, you can remove any added employees or Tracking Level Items

Once you add the required information, you need to click on the “Ok” button as shown below



Team Supervisors

Edit Team Supervisors : Using this button, you can “Edit” team supervisors. When you click on this, system will load a pop-up/overlay as shown below



Once you click on “Ok” system the system will save the record

Understanding the Team Supervisor Filter

Supervisors must be explicitly listed in order to have access to the Team. This behavior is different from Employee filters where an empty filter is considered unfiltered.

Available Supervisors : This section will display all the available supervisors

[Button] Add : Using this, you can add the selected supervisors

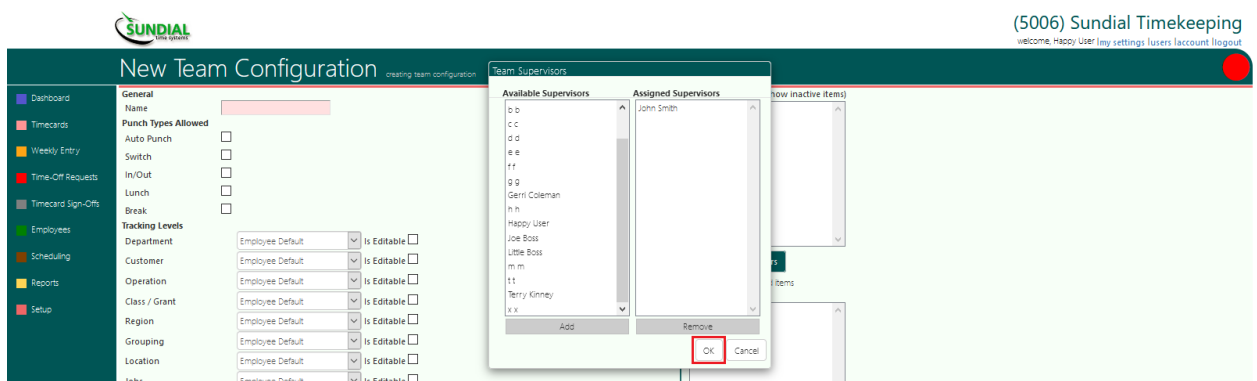
Furthermore the system allows you to select multiple employees using 3 different types of selects which involves a combination of keys as shown below. Currently the system supports the following multi select options.

- **Shift + Click** (Selects Last Click to Current Click)
- **Control + Click** (Adds or Removes Clicked Selection)
- **Control+Shift + Click** (Adds Group from Previous Click to Current Click)

Assigned Supervisors : This section will display the added supervisors

[Button]Remove : Using the remove button, you can remove any added supervisors

Once you add the required information, you need to click on the “Ok” button as shown below



Once you click on “Ok” system the system will save the record

Once you fill all the required information you need to click on the “Save” button as shown below

The screenshot shows the 'New Team Configuration' page in the Sundial Timekeeping system. The page has a dark green header with the Sundial logo and the text '(5006) Sundial Timekeeping'. Below the header is a navigation menu on the left with options like Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is titled 'New Team Configuration' and contains several sections: 'General' with a text input field for 'Name' (containing 'Test Team Configuration'), 'Punch Types Allowed' with checkboxes for Auto Punch, Switch, In/Out, Lunch, and Break, and 'Tracking Levels' with dropdown menus for Department, Customer, Operation, Class / Grant, Region, Grouping, Location, and Jobs, each with an 'Is Editable' checkbox. On the right side, there are two lists: 'Team Members' (showing employees like Autumn Bell, Destiny Smith, Dixie Louise, and Frank Speaker) and 'Team Supervisors' (showing John Smith). Both lists have 'Edit Team Members' and 'Edit Team Supervisors' buttons. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.

Once you click on “Save” system the system will save the Team configuration as shown below

The screenshot shows the 'Team Configurations' list in the Sundial Timekeeping system. The page has a dark green header with the Sundial logo and the text '(5006) Sundial Timekeeping'. Below the header is a navigation menu on the left with options like Dashboard, Timecards, Weekly Entry, Time-Off Requests, and Timecard Sign-Offs. The main content area is titled 'Team Configurations' and contains a list of configurations. The 'Test Team Configuration' entry is highlighted with a red border. The list includes columns for 'Name', 'Add', 'Edit', 'Delete', and 'Items 3 (0)'. Below the list, there are 'Add', 'Edit', and 'Delete' buttons, and a 'Geofences' link.

Editing a Team Configuration

In order to “Edit” Team configurations, you need to first select the Team configuration by clicking on it as shown below

The screenshot shows the 'Team Configurations' list in the Sundial Timekeeping system. The page has a dark green header with the Sundial logo and the text '(5006) Sundial Timekeeping'. Below the header is a navigation menu on the left with options like Dashboard, Timecards, Weekly Entry, Time-Off Requests, and Timecard Sign-Offs. The main content area is titled 'Team Configurations' and contains a list of configurations. The 'Test Team Configuration' entry is highlighted with a red border. The list includes columns for 'Name', 'Add', 'Edit', 'Delete', and 'Items 3 (0)'. Below the list, there are 'Add', 'Edit', and 'Delete' buttons, and a 'Geofences' link. The 'Edit' button is highlighted with a red box.

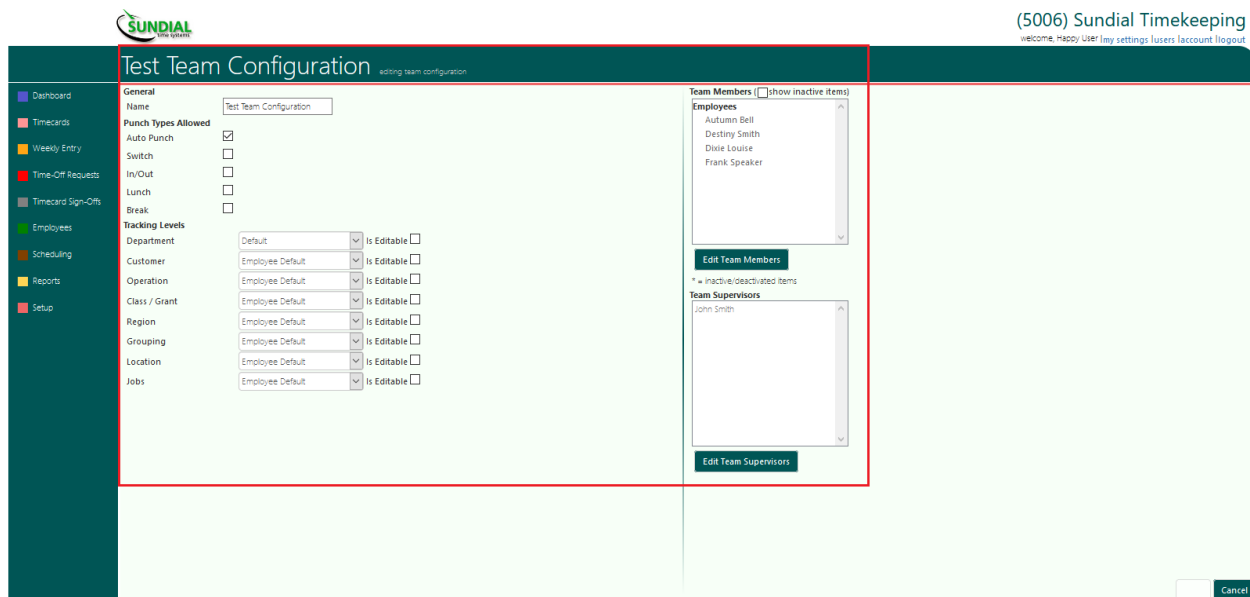
Once you click on a Team configuration the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



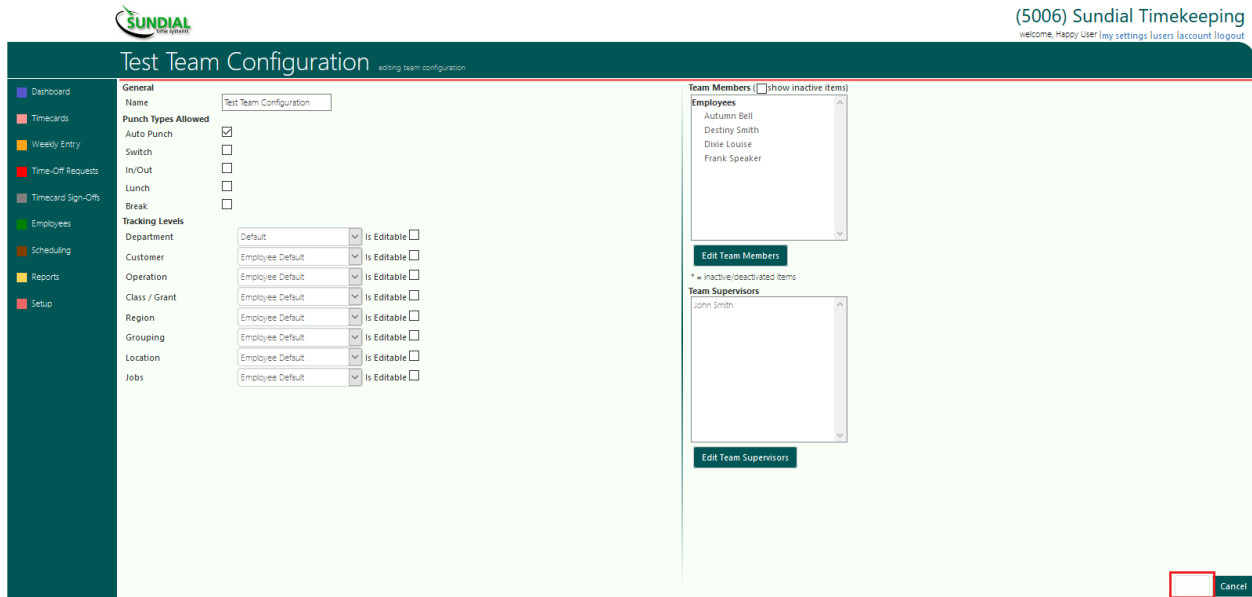
Now you need to click on the “Edit” button as shown below



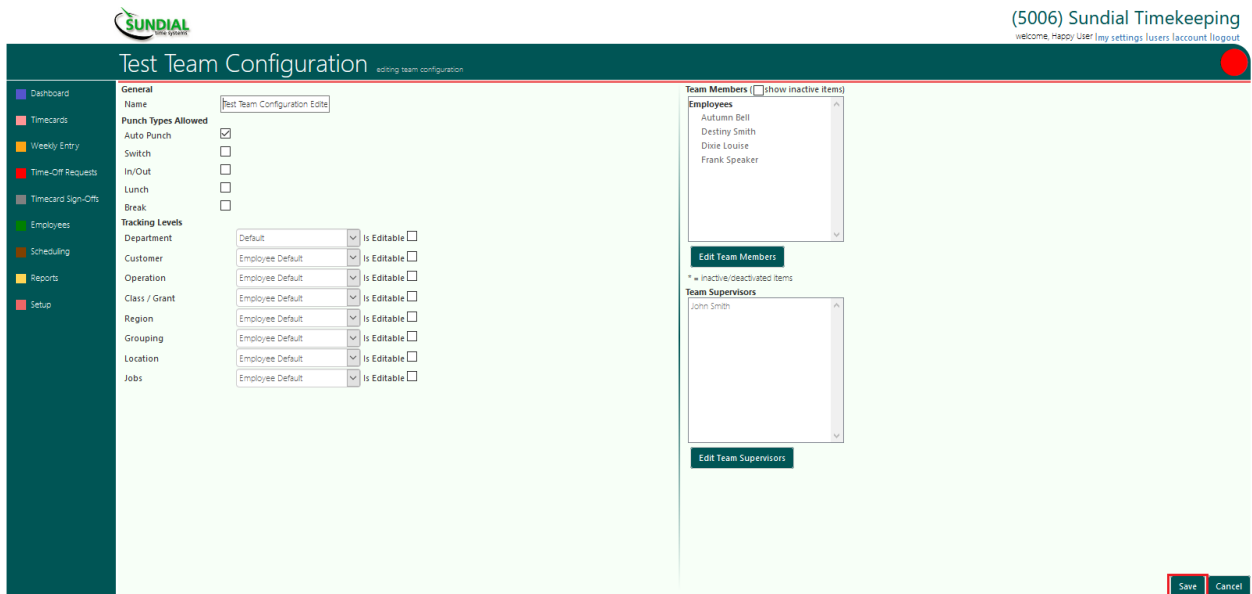
Once the “Edit” button is clicked the system will load the Team configurations in an editable mode as shown below. You will now be able to make any changes to existing rule values.



Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below



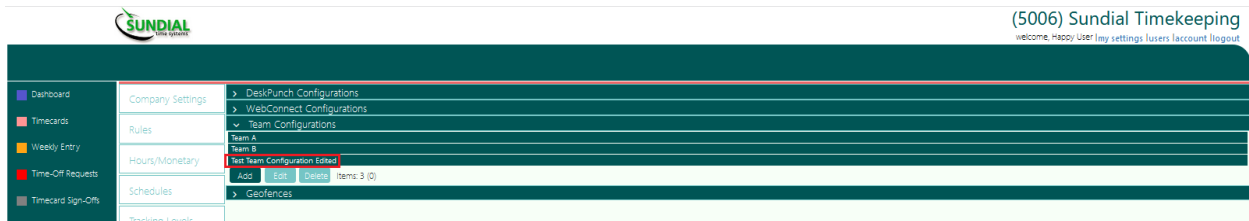
Once you make any changes the system will enable the “Save” button as shown below.



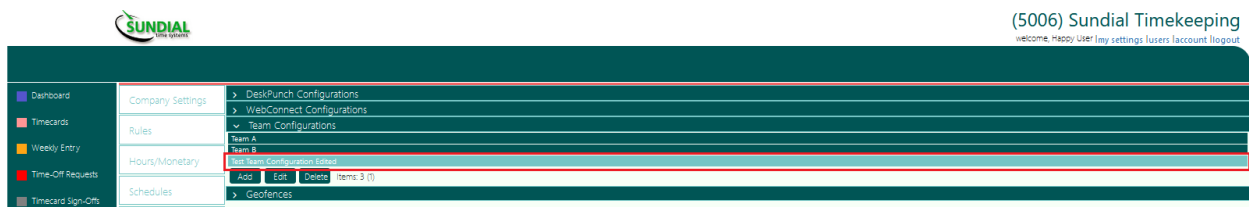
Once you click on the “Save” button the system will save any changes done

Deleting a Team Configuration

In order to “Delete” Team configuration, you need to first select the “Team Configuration” by clicking on it as shown below



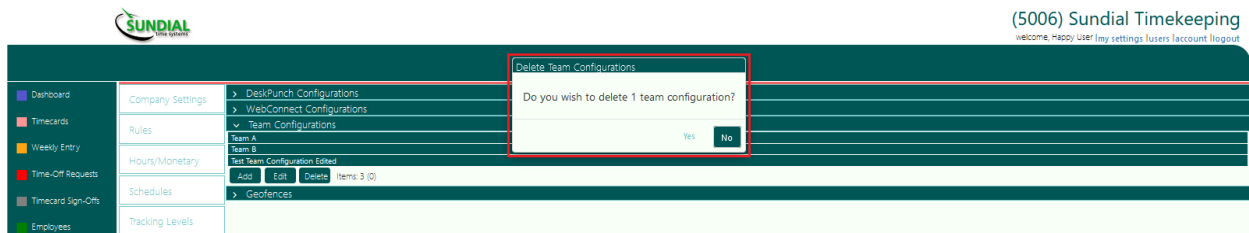
Once you click on a Team configuration the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



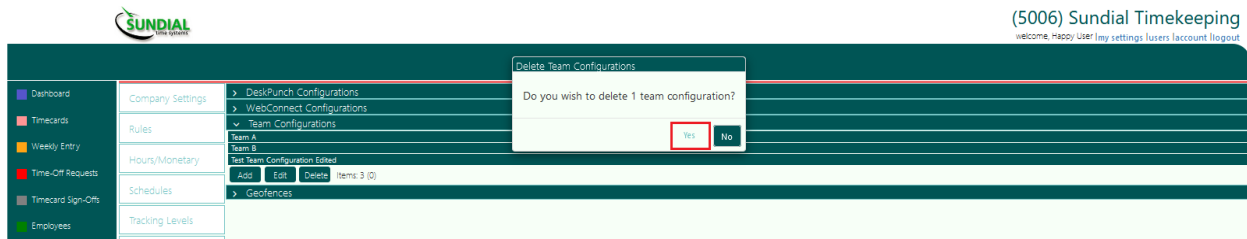
Now you need to click on the “Delete” button as shown below



Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click “Ok” on this pop-up/overlay as shown below



Once you click “Ok” the system will then delete the selected configuration as shown below



Geofences

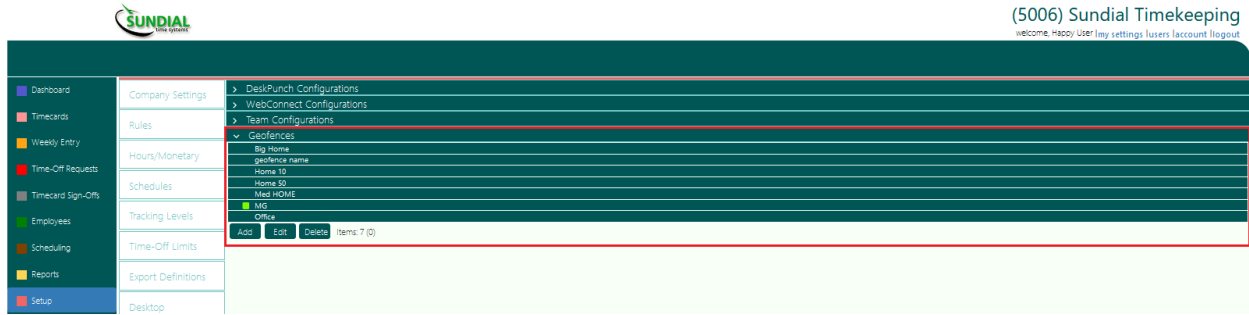
Understanding the Geofences

This is a way to create Geofences that are used by the Sundial Mobile Punch, our mobile clocking App. Sundial Mobile Punch App has a dependency on the WebConnect Configuration and the Employee's WebConnect Password. Once Geofences are created, they need to be assigned to the WebConnect Configurations in order to be used by the Mobile Punch App

In order to get into the “Geofences” you need to expand the “Geofences” section by clicking on it as shown below

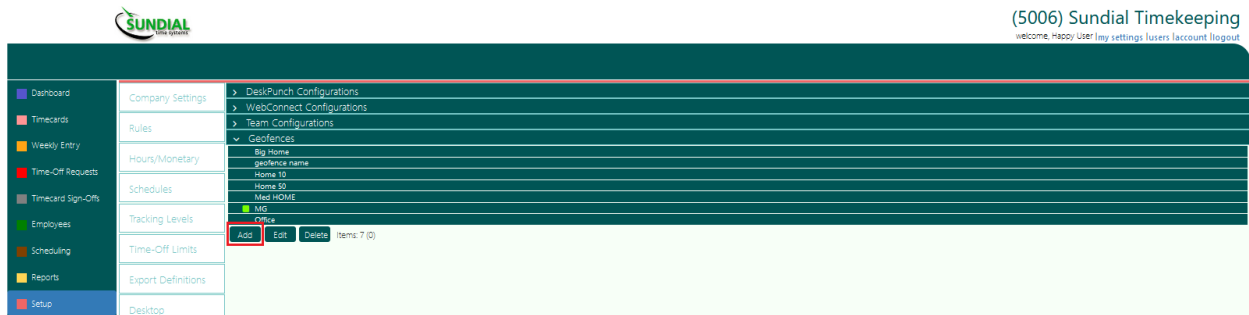


Once you click on this section, system will expand the section as shown below



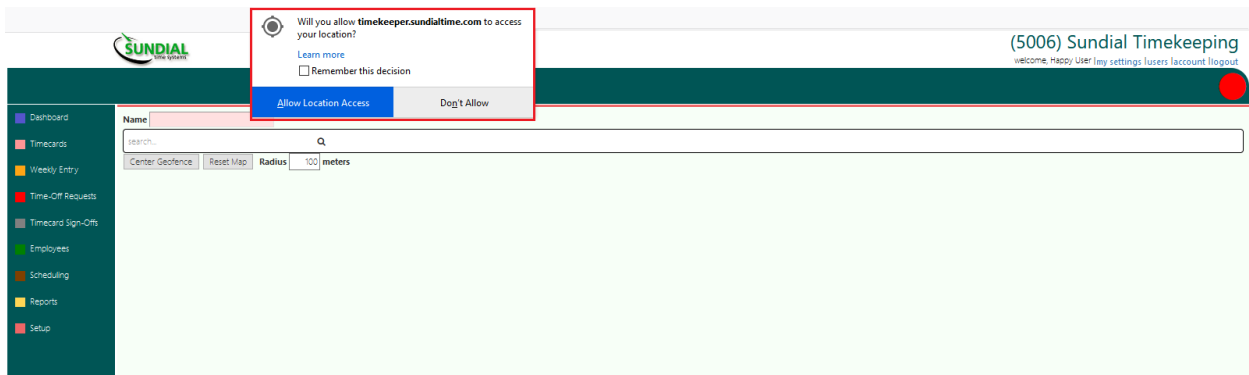
Adding a Geofence

In order to “Add” a Geofence you need to click on the “Add” button as shown below

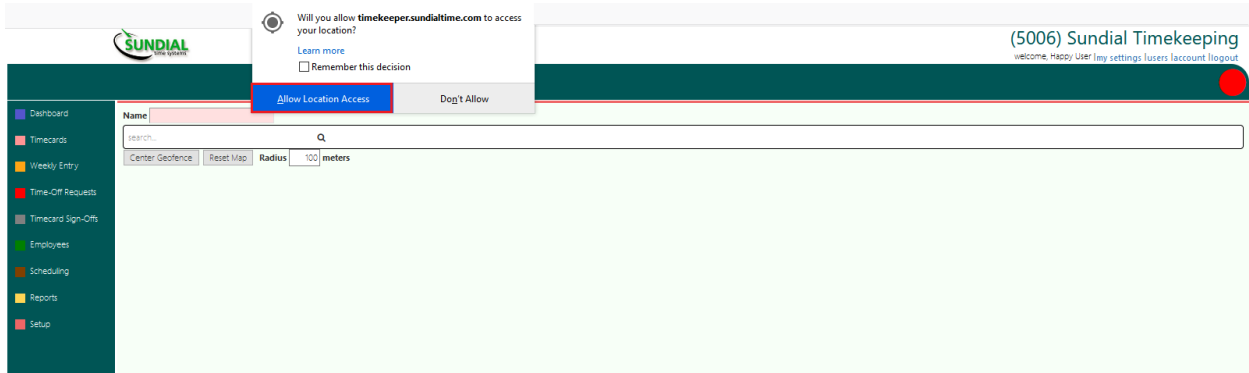


Once you click on the “Add” button, system will display the below screen as shown below

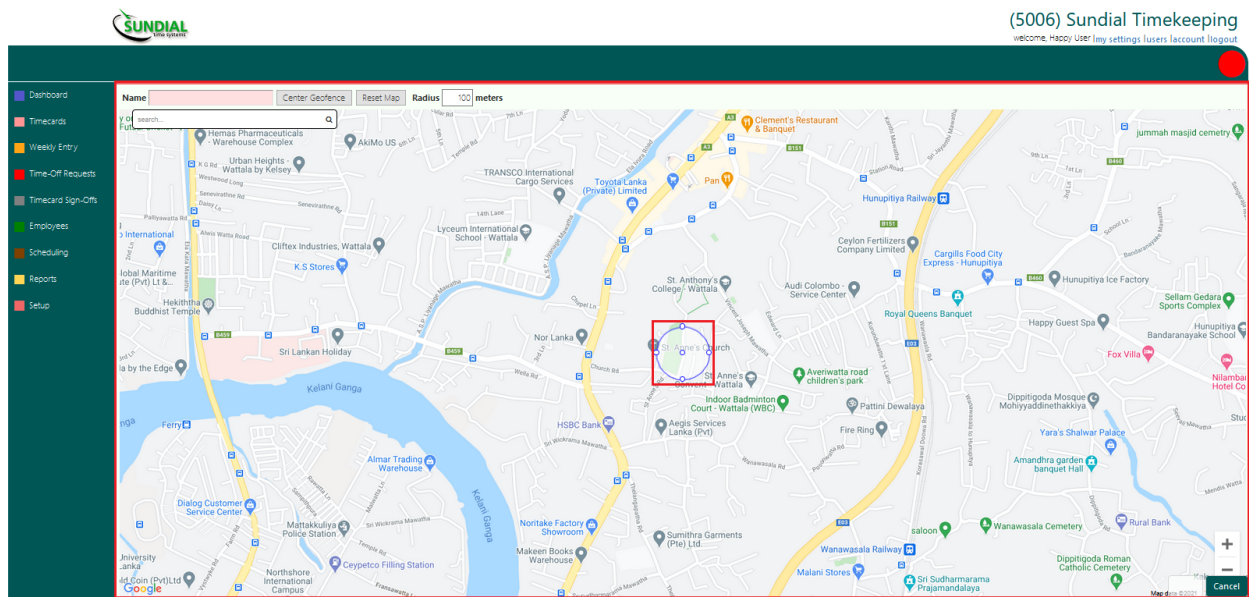
Note : In order for this module to be functional the system needs to access your PC location. When this screen is loaded, browser will load a pop-up asking permission to allow the system to access your location as shown below



In order for the system to enable the geofencing features, you need to click on “Allow Location Access” on the browser.



Once you click on “Allow Location Access” system will load the below screen with the maps loaded in indicating the current location you are with a circle



Understanding the Geofencing screen

Name : Using this field, you can set up a name for the Geofence

Center Geofence : Use this button to align the center of the Geofence to your location. If you did not allow the browser to provide location information, then it will make it's best guess based on your IP Address.

Reset Map : Using this button, you can “Reset” the loaded map on the screen

Radius : This field will be the “Radius” of the Geofence as per your selection made. Furthermore you can key in a radius and the system will automatically set the Geofence accordingly

Search : Using this field, you will be able to search locations on the map



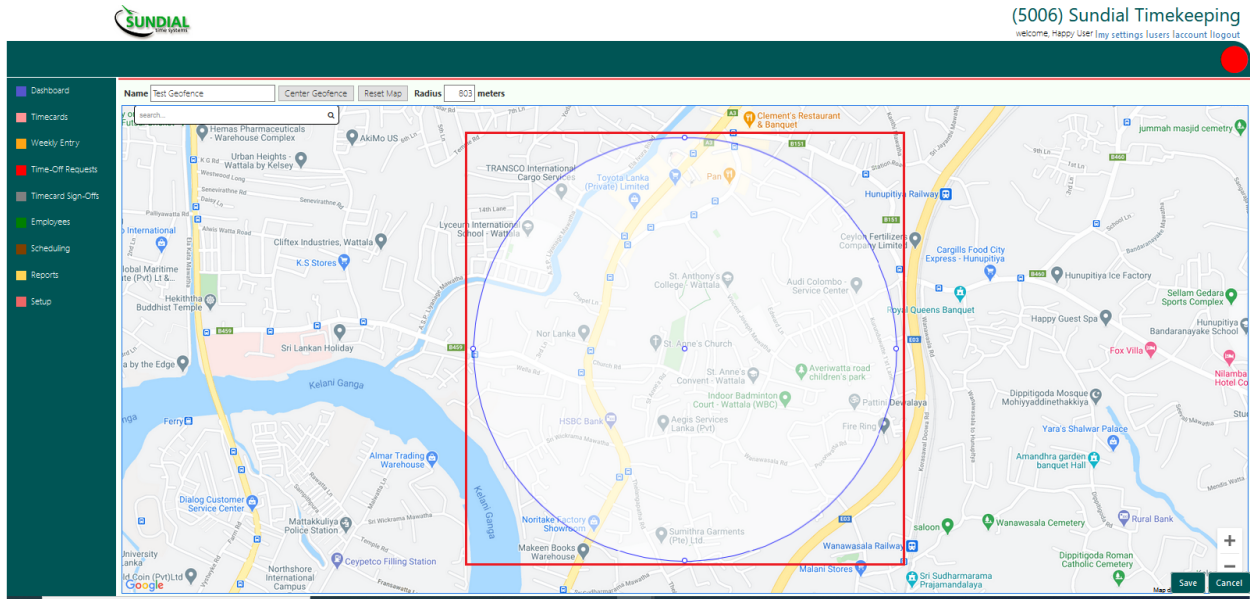
Zoom In / Zoom Out : Using the + and - boxes in the lower right area of the map, you can zoom in and out, allowing you to be more precise about your Geofence Area. Ctrl + Mouse Scroll will also zoom in and out on the map.



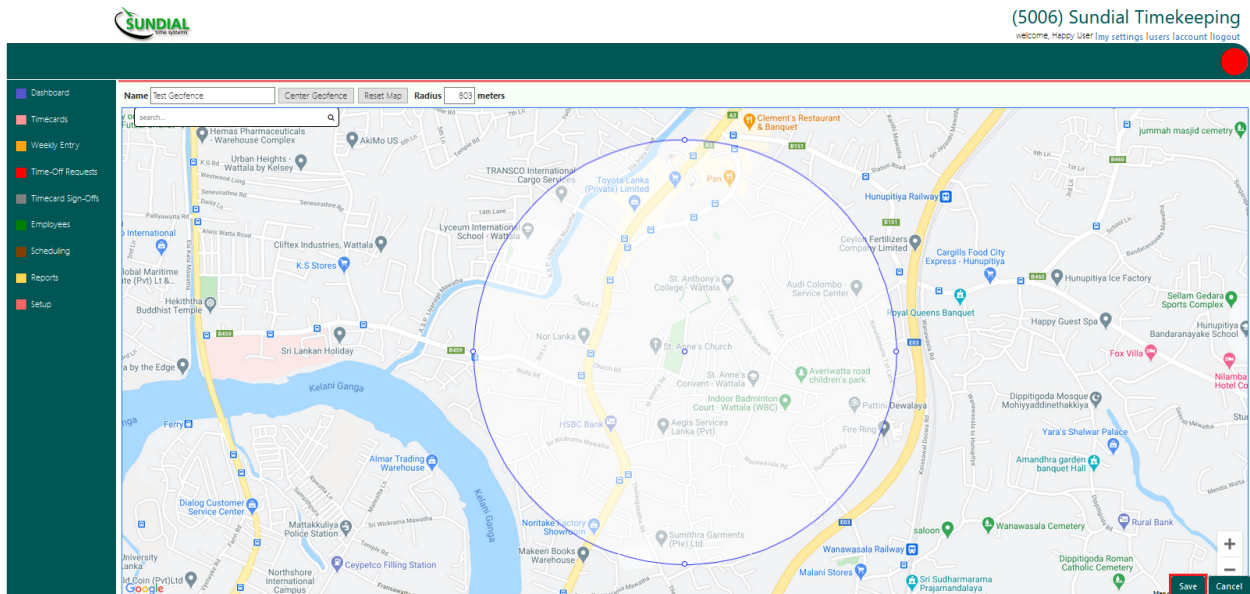
Decreasing the geo fencing area : In order to decrease the Geofencing area, you need to drag the circle in. (towards the centre). Once this is done, you will see the circle has got smaller as shown below

The screenshot displays the SUNDIAL web interface for geofencing. At the top left is the SUNDIAL logo. At the top right, it says "(5006) Sundial Timekeeping" with a user welcome message and navigation links. A dark sidebar on the left contains menu items: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main area features a map with a geofence circle centered on a location. Above the map, there are input fields for "Name" (containing "Test Geofence"), "Center Geofence" (with a location pin icon), "Reset Map" (with a refresh icon), and "Radius" (set to "52 meters"). A search bar is also present. The map shows various landmarks and streets, with a red box highlighting the geofence circle. At the bottom right of the map, there are "Save" and "Cancel" buttons. The URL at the bottom left is "https://calendar.ooole.com/calendar/u/0/r?tab=mc&plc=1".

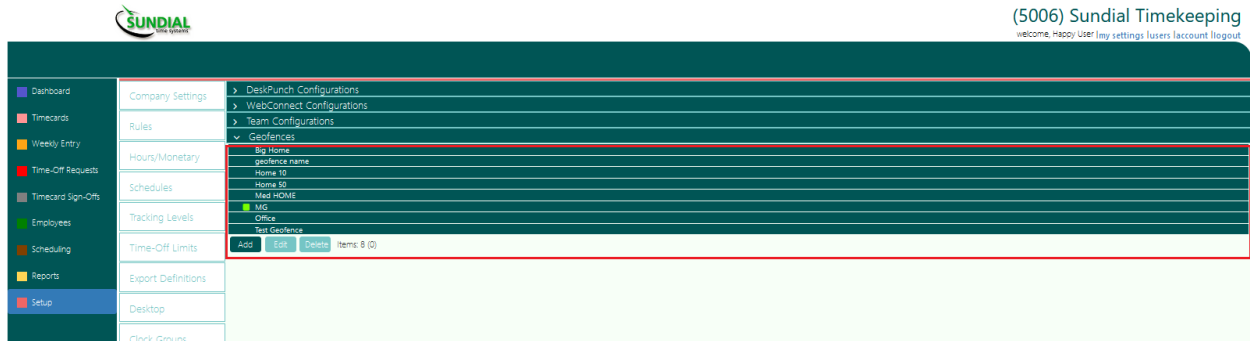
Increasing the geo fencing area : In order to increase the Geofencing area, You can pull the circle outwards to expand the area that gets covered under the Geofencing as shown below



Once the Geofencing area is selected, you can click on “Save” button as shown below



Once you click on "Save" system will save the Geofence as shown below



Editing a Geofence

In order to "Edit" a Geofence, you need to first select the Geofence by clicking on it as shown below



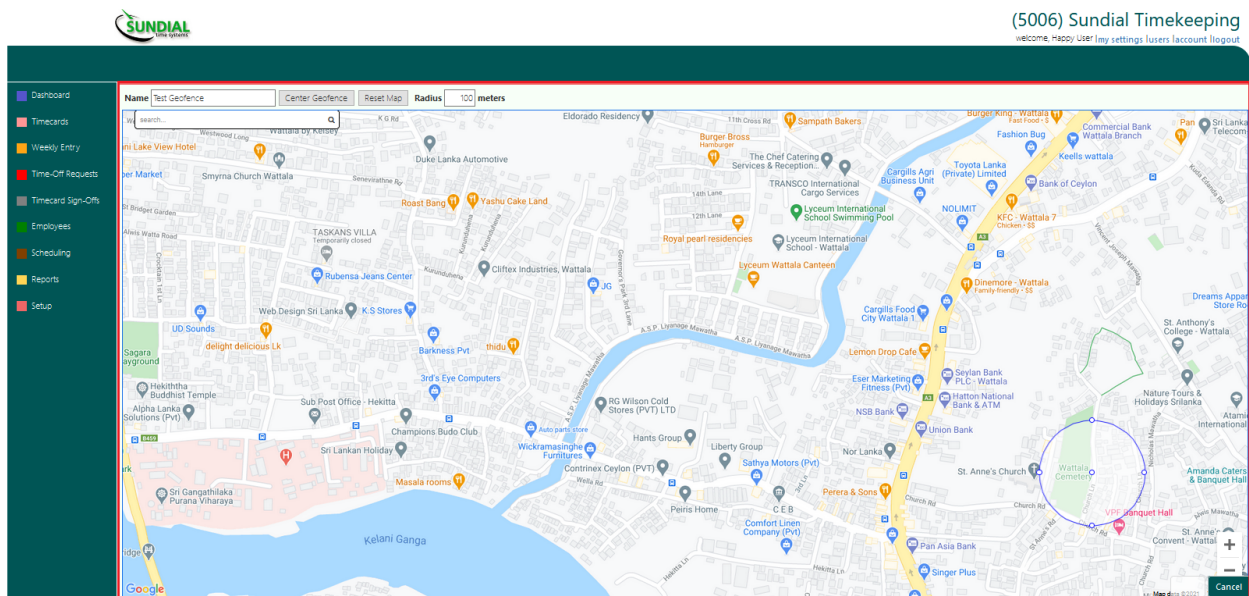
Once you click on a Geofence the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



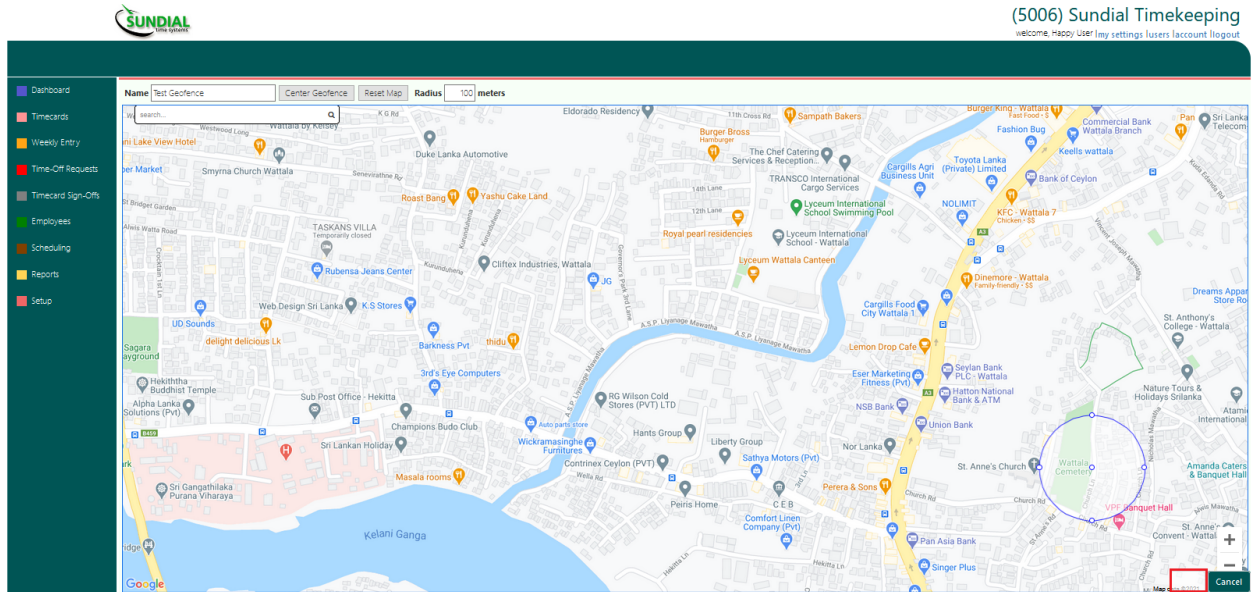
Now you need to click on the “Edit” button as shown below



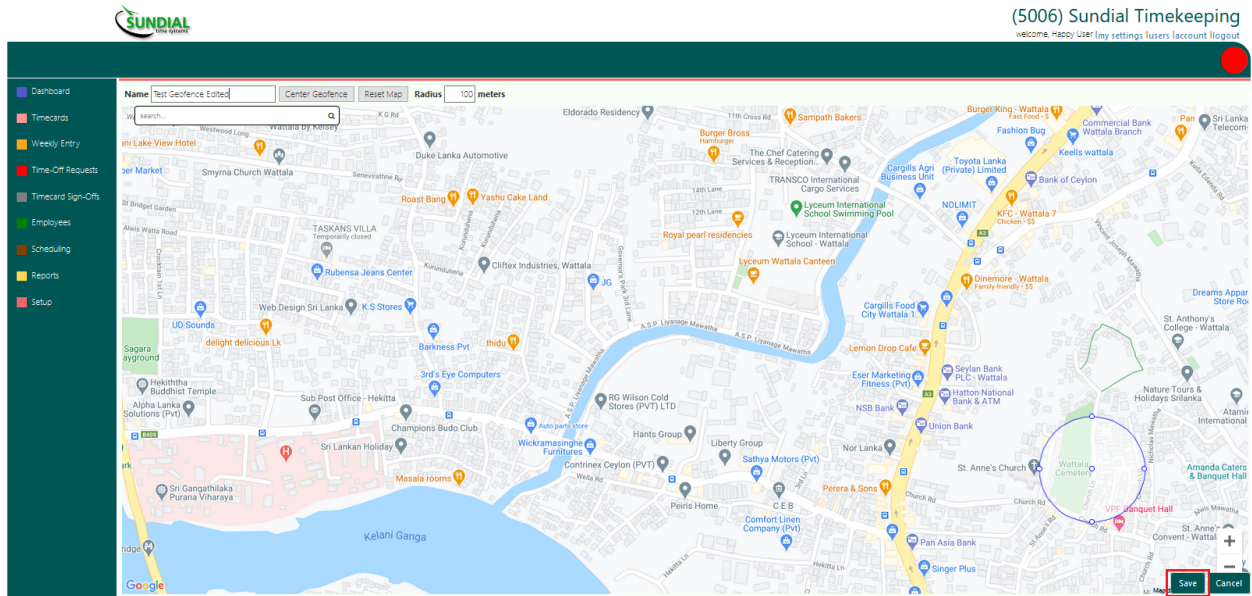
Once the “Edit” button is clicked the system will load the Geofence in an editable mode as shown below. You will now be able to make any changes to existing rule values.



Until any changes are made to any existing values, the **“Save”** button will be in a disabled state as shown below



Once you make any changes the system will enable the **“Save”** button as shown below.



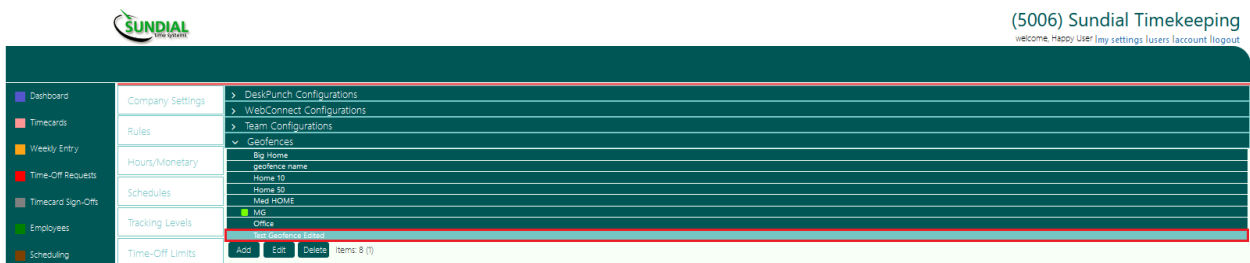
Once you click on the **“Save”** button the system will save any changes done

Deleting a Geofence

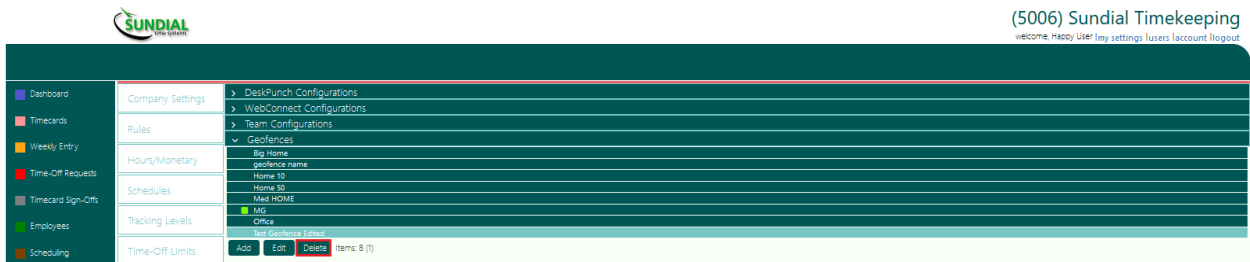
In order to “Delete” Geofence, you need to first select the “Geofence” by clicking on it as shown below



Once you click on a Geofence the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



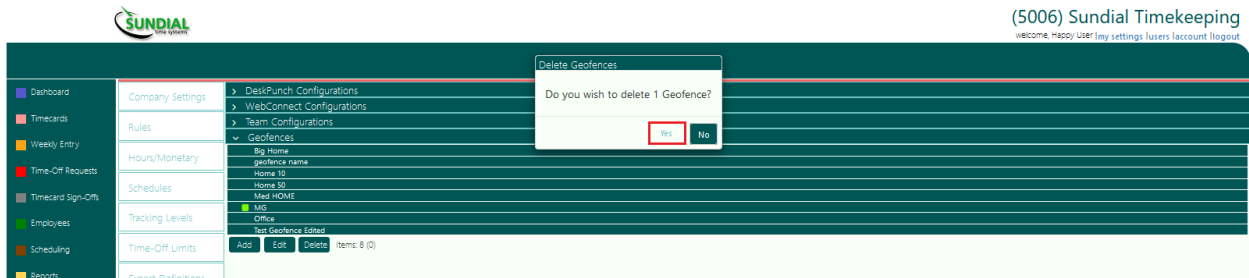
Now you need to click on the “Delete” button as shown below



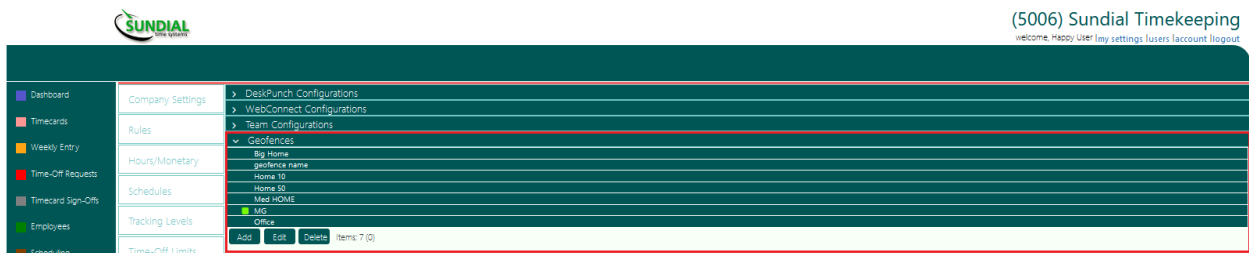
Once you click on **“Delete”** the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click **“Yes”** on this pop-up/overlay as shown below



Once you click **“Yes”** the system will then delete the selected configuration as shown below



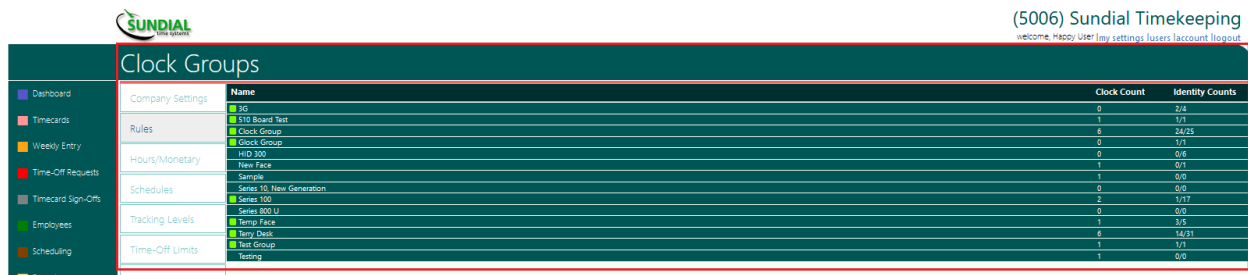
5.11.11. Clock Groups

Going into “Clock Groups”

In order to get in to the “Clock Groups” you need to click on “Clock Groups” under the “Setup” section as shown below



Once you click on “Clock Groups” section, you will be navigated in to the “Clock Groups” page as shown below



Understanding the “Clock Groups”

Clock Groups are used for isolating one or more physical time clocks from one another. Each Clock Group can contain an unlimited number of physical time clock configurations. Every Clock Identity Pin is going to be associated with a specific clock group. Identical Clock Identity Pins can be assigned to different Clock Groups. The Employee associated with those Identical Pins do not have to be the same employee. Because the relationship from Employee to Clock Group to Clock Identity Pin can be complex, please discuss your needs with a Support Technician before creating multiple clock groups.

Adding a Clock Group

In order to “Add” a Clock group, you need to click on the “Add” button as shown below

The screenshot shows the Sundial Timekeeping interface. The top right corner displays the user information: (5006) Sundial Timekeeping, with a welcome message and links for settings, users, account, and logout. The main header is 'Clock Groups'. On the left is a sidebar with navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is divided into sections: Company Settings, Rules, Hours/Monetary, Schedules, Tracking Levels, Time-Off Limits, Export Definitions, Desktop, Clock Groups, Clock Identities, and Punch Cycles. A table is displayed under the 'Rules' section, showing a list of clock groups with columns for Name, Clock Count, and Identity Counts. The 'Add' button in the bottom navigation bar is highlighted with a red box.

Name	Clock Count	Identity Counts
3G	0	2/4
510 Board Test	1	1/1
Clock Group	5	22/25
Clock Group	0	1/1
HID 300	0	0/0
New Face	1	0/1
Simple	1	0/0
Series 10, New Generation	0	0/0
Series 100	2	1/17
Series 800 U	0	0/0
Terry Face	1	3/5
Terry Desk	6	14/31
Test Group	1	1/1
Testing	1	0/0

Once you click on the “Add” button, system will display the below screen as shown below

The screenshot displays the 'New Clock Group' configuration interface. On the left is a dark sidebar with navigation links: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area has a header 'New Clock Group' with a sub-header 'creating clock group'. Below this are three input fields: 'Group Name' (text input), 'Auto-Shift Logout' (checkbox), and 'Auto-Shift Length' (text input with '0:00' entered). A table titled 'Clocks' follows, with columns 'Name', 'Serial Number', and 'Last Touched (Local Time)'. The table is currently empty. At the bottom of the main area, there is a toolbar with buttons: 'Add', 'Edit', 'Delete', 'Items: 0 (0)', 'Clock Tools', and 'Cancel'. The top right corner shows the user's session information: '(5006) Sundial Timekeeping' and 'welcome, Happy User | my settings | users | account | logout'.

Understanding the Clock Group Screen

Group Name : Using this field you can provide a New Clock Group name for the New Clock Group Configuration

[Checkbox] Auto-Shift Logout : Auto-Shift Logout, when enabled, will automatically log employees out whenever they clock in. The Automatic logout will be “Auto-Shift Length” duration after their clock in time.

Auto-Shift Length : Use this field to define the duration of shifts when using “Auto-Shift Logout” above.

NOTE: This cannot be a length of 0. By default the length is 1 second (0:00:01). Your user formatting rules will display this as 0:00 if the Company Settings >> Preferences >> Seconds Resolution is set to Round or Truncate (default).

Add : Once the above detailed are filled, using this button you will be add the “New Clock Group”

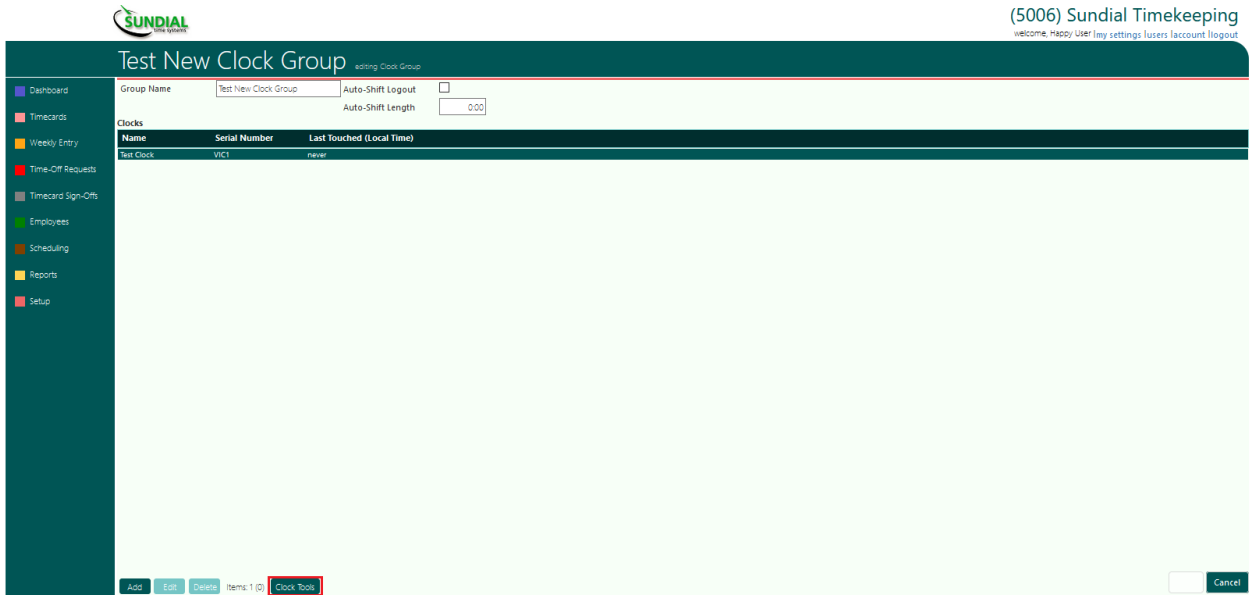
Edit : Using this button, you will be able to Edit an existing Clock Group

Delete : Using this button, you will be able to Delete existing Clock Group

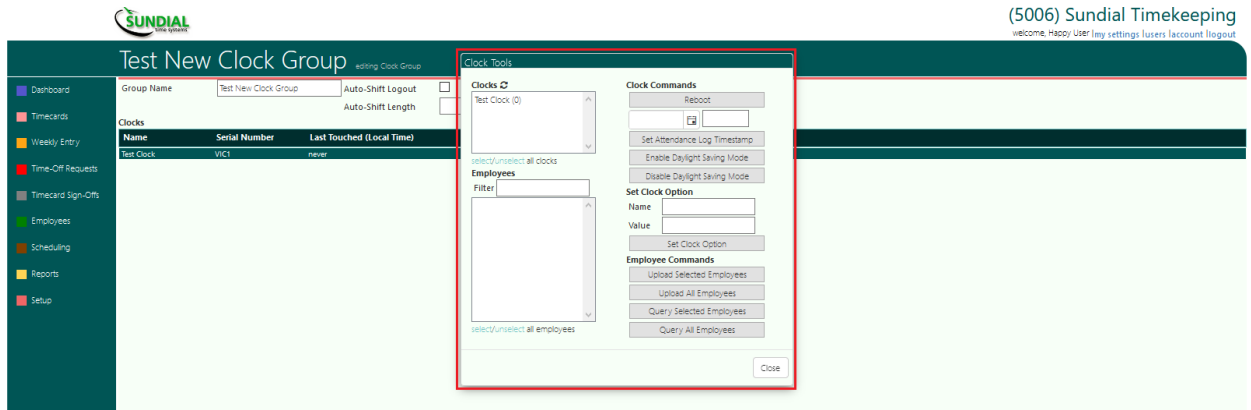
Clock tools : Clicking on this button will take you to the Clock tools

Understanding Clock tools

In order to get in to the Clock tools, you need to click on the “Clock Tools” button as shown below



Once you click on the “Clock Tools” button, system will display a pop-up/overlay as shown below



Understanding the Clock Tools Pop-up/Overlay

Clocks : This section will display any clocks available. Values in parenthesis indicate the number of commands that are still pending for the clock.

Employees : Using this section, you can choose specific employees to send to the clock.

Clock Commands

Reboot : Using this button, you will be able to reboot your clock

Set Attendance Log Timestamp : Using this button, you will be able to set Attendance Log Timestamp. This helps the software skip information that it has already processed

Enable Daylight Saving Mode : Using this button, you will be able to Enable Daylight Saving Mode. This sends the next two Daylight Saving Event timestamps and enables the clocks' ability to automatically change its time at the Daylight Saving Time transition.

Disable Daylight Saving Mode : Using this button, you will be able to Disable Daylight Saving Mode

Set Clock Option

Name : Specify the Option Parameter Name you wish to adjust

Value : Specify the Value you wish to assign to the above named Option Parameter

Set Clock Option : Using this button, you will be able to set the clock option provided in the Name and Value fields

NOTE: Set Clock Option area can also be used to submit complex commands to the clock. To do so, the Name field must start with "CMD". The Value field can then have a full text of the instruction command.

Employee Commands

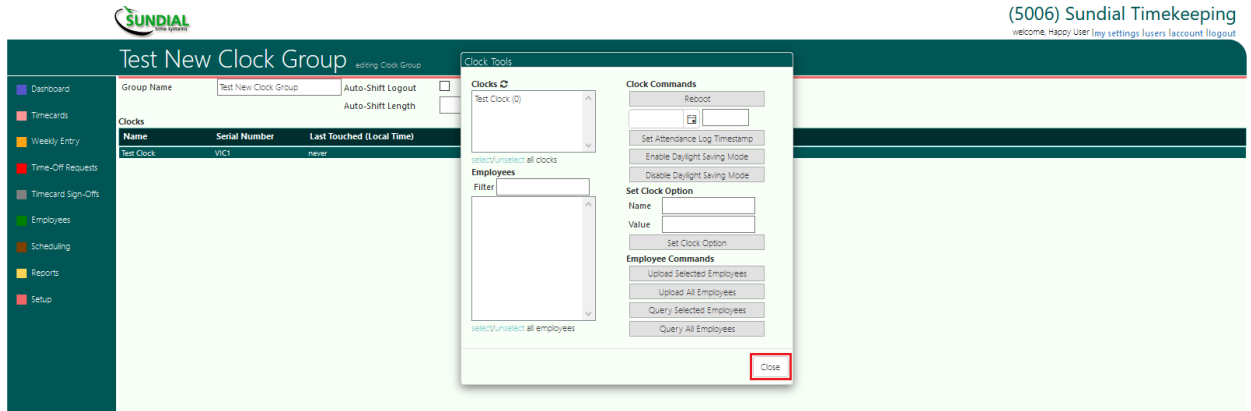
Upload Selected Employees : Using this button, you will be able to Upload Selected Employees

Upload All Employees : Using this button, you will be able to Upload All Employees

Query Selected Employees : Using this button, you will be able to Query Selected Employees

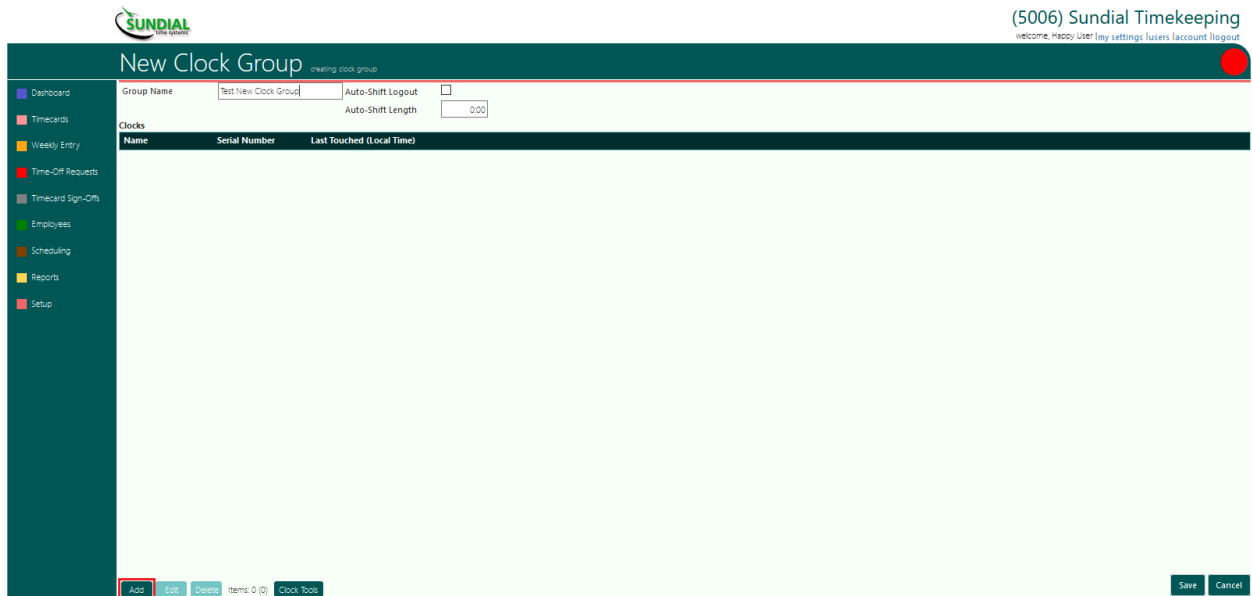
Query All Employees : Using this button, you will be able to Query All Employees

Once you do carry out the required changes, you need to click on the “Close” button as shown below in order for you to exit from the Clock Tools Pop-up/Overlay as shown below

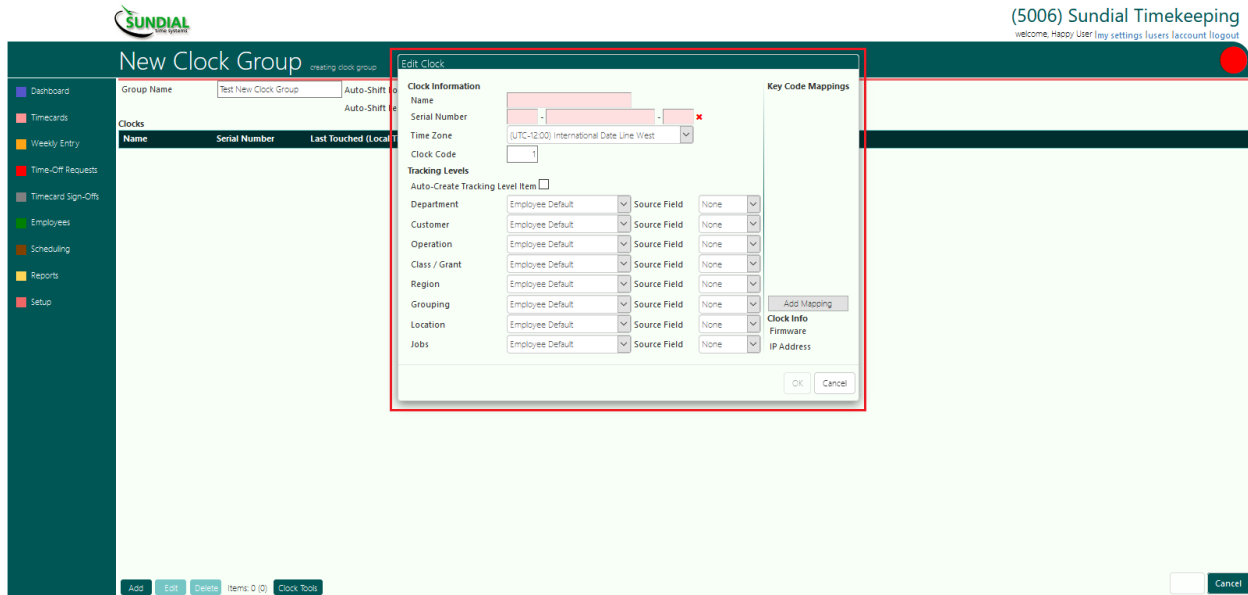


Once the overlay is closed, you will be navigated back to the New Clock Group Page as shown below.

Once the Name is & the other information required are entered, you can click on the “Add” button as shown below



Once you click on the “Add” button, system will display a pop-up/overlay as shown below



New Clock Group Pop-up/Overlay

Clock Information

Name : Using this field you can provide a name for the Clock

Serial Number : Using this field, you can provide the serial number of the clock. Only the middle portion is printed on the clock itself. The full serial number is printed on a card and included in the clock package. If you can't location this card, please contact Sundial Support for a Full Serial Number.

Time Zone : Define the correct Time Zone of the clock

Clock Code : Using this field, you can define the Clock Code. Generally this will start with 1 and increment one for each clock within the company (including other clock groups)

Tracking Levels

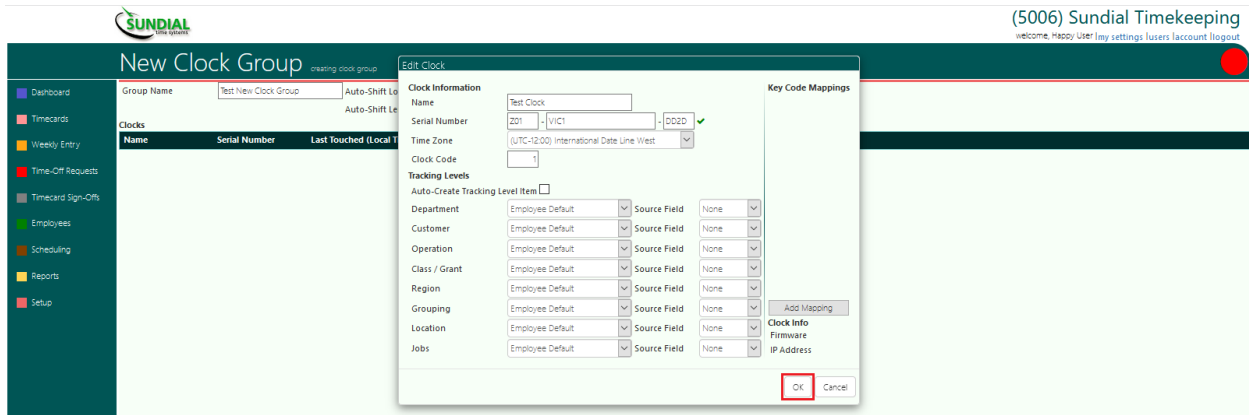
[Checkbox] Auto-Create Tracking Level Item : Enabling this option causes the system to create any tracking level item entered by an employee that is not found.

[Dropdown] Tracking Level 1~8: Using this dropdown, you can specify a default Tracking Level Item for punches collected by the clock, including “None” and “Employee Default”. “Locked” employee assignments are not overridden by this selection.

Source Field : Using this field, you can specify that a value selected by the employee, during the clocking process, will override the Clock Default on the left, and the Employee’s assigned default.

Add Mapping : Using this field, you can link Key Codes specified at the clock to explicit punch types within the software.

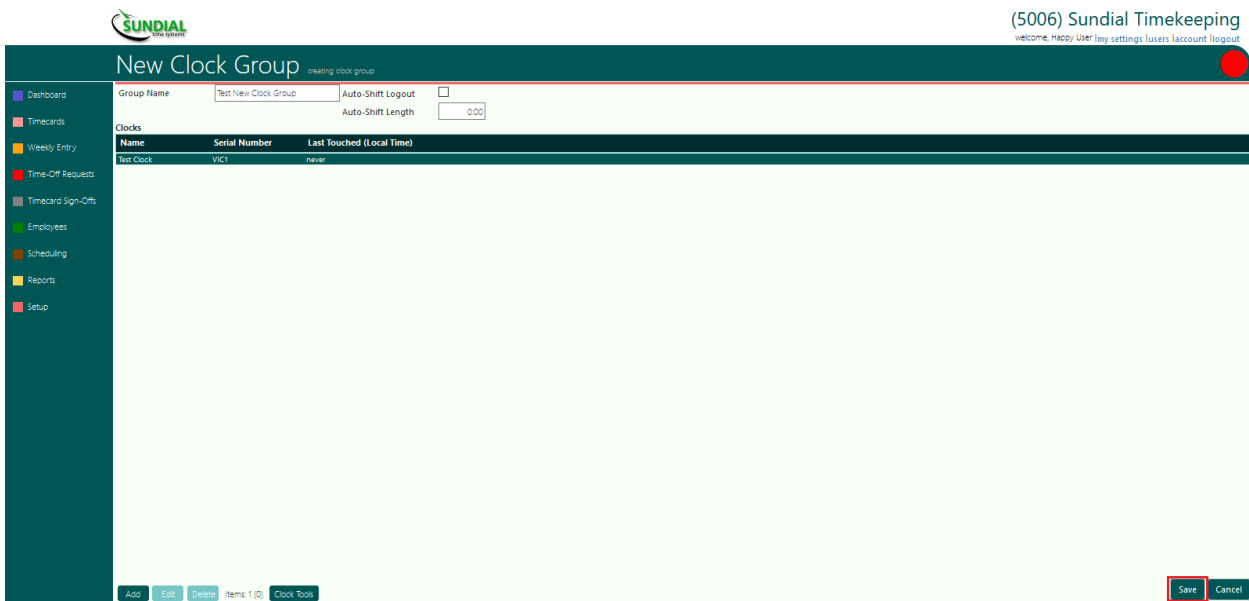
Once the relevant information is added, you can click on the “Ok” button as shown below



Once you click on “Ok” system will add this information as shown below



Now you need to click on the “Save” button in order for the system to save this information as shown below



Once you click on “Save” system will save this information as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

	Name	Clock Count	Identity Counts
Company Settings	3G	0	2/4
	510 Board Test	1	1/1
Rules	Clock Group	5	24/25
	Clock Group	0	1/1
Hours/Monetary	HID 300	0	0/0
	New Face	1	0/1
Schedules	Sample	1	0/0
	Series 10, New Generation	0	0/0
	Series 100	2	1/17
	Series 800 U	0	0/0
Tracking Levels	Temp Face	1	3/5
	Terry Desk	6	14/31
Time-Off Limits	Test Group	1	1/1
	Test New Clock Group	1	0/0
	Testing	1	0/0

Editing a Clock Group

In order to “Edit” a Clock Group, you need to first select the Clock Group by clicking on it as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

	Name	Clock Count	Identity Counts
Company Settings	3G	0	2/4
	510 Board Test	1	1/1
Rules	Clock Group	5	24/25
	Clock Group	0	1/1
Hours/Monetary	HID 300	0	0/0
	New Face	1	0/1
Schedules	Sample	1	0/0
	Series 10, New Generation	0	0/0
	Series 100	2	1/17
	Series 800 U	0	0/0
Tracking Levels	Temp Face	1	3/5
	Terry Desk	6	14/31
Time-Off Limits	Test Group	1	1/1
	Test New Clock Group	1	0/0
	Testing	1	0/0

Once you click on a Team configuration the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

	Name	Clock Count	Identity Counts
Company Settings	3G	0	2/4
	510 Board Test	1	1/1
Rules	Clock Group	5	24/25
	Clock Group	0	1/1
Hours/Monetary	HID 300	0	0/0
	New Face	1	0/1
Schedules	Sample	1	0/0
	Series 10, New Generation	0	0/0
	Series 100	2	1/17
	Series 800 U	0	0/0
Tracking Levels	Temp Face	1	3/5
	Terry Desk	6	14/31
Time-Off Limits	Test Group	1	1/1
	Test New Clock Group	1	0/0
	Testing	1	0/0

Now you need to click on the “Edit” button as shown below

(5006) Sundial Timekeeping
welcome, H300 User | My settings | Users | Account | Logout

Clock Groups

Company Settings	Name	Clock Count	Identity Counts
Rules	3G	0	2/4
	510 Board Test	1	1/5
	Clock Group	5	24/25
	Clock Group	0	1/1
Hours/Monetary	HID 300	0	0/6
	New Face	1	0/3
Schedules	Sample	1	0/0
	Series 10, New Generation	0	0/0
	Series 300	2	1/27
	Series 800 UJ	0	0/0
Tracking Levels	Temp Face	1	3/5
	Temp Desk	5	14/31
Time-Off Limits	Test Group	1	1/3
	Test New Clock Group	1	6/9
	Testing	1	0/0

Export Definitions

Desktop

Clock Groups

Clock Identities

Punch Cycles

Add Edit Delete Items: 15 (1)

Once the “Edit” button is clicked the system will load the Clock Group in an editable mode as shown below. You will now be able to make any changes to existing values.

(5006) Sundial Timekeeping
welcome, H300 User | My settings | Users | Account | Logout

Test New Clock Group

editing Clock Group

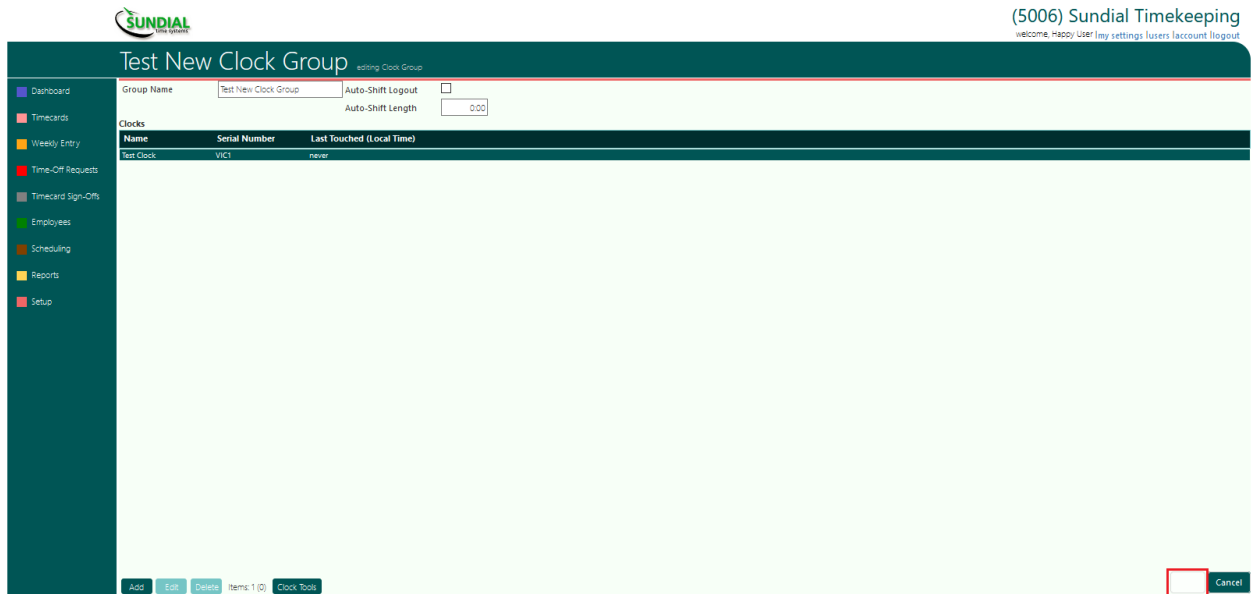
Group Name: Auto-Shift Logout: Auto-Shift Length:

Name	Serial Number	Last Touched (Local Time)
Test Clock	VIC1	never

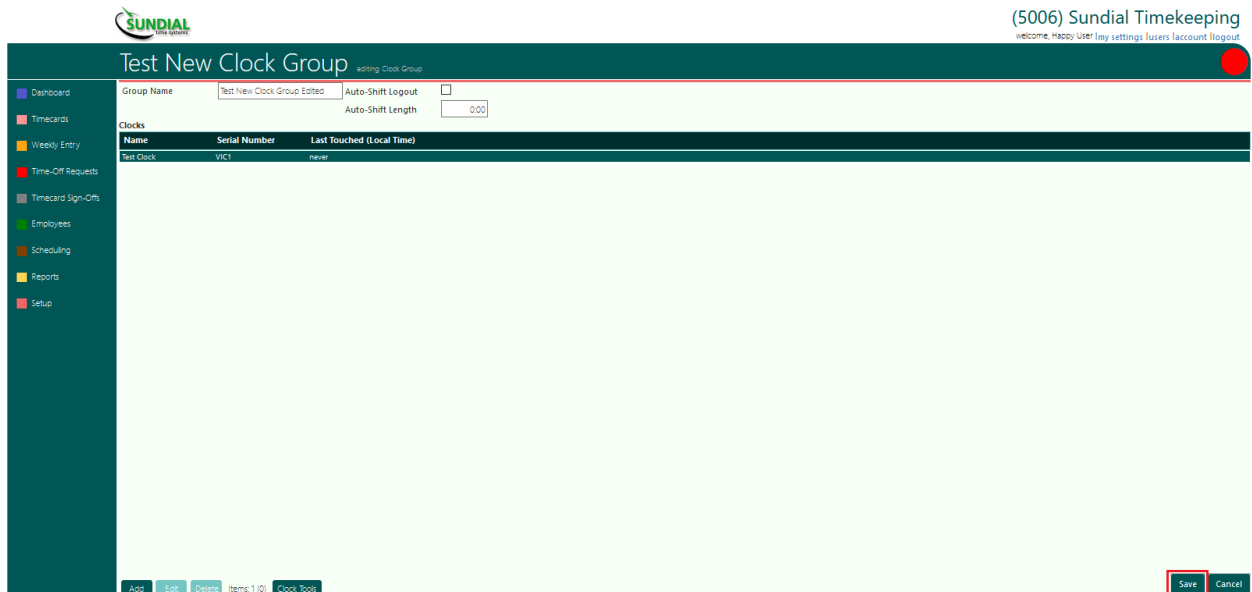
Add Edit Delete Items: 1 (0) Clock Tools

Cancel

Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below



Once you make any changes the system will enable the “Save” button as shown below.



Once you click on the “Save” button the system will save any changes done

Deleting a Clock Group

In order to “Delete” Clock Group, you need to first select the “Clock Group” by clicking on it as shown below

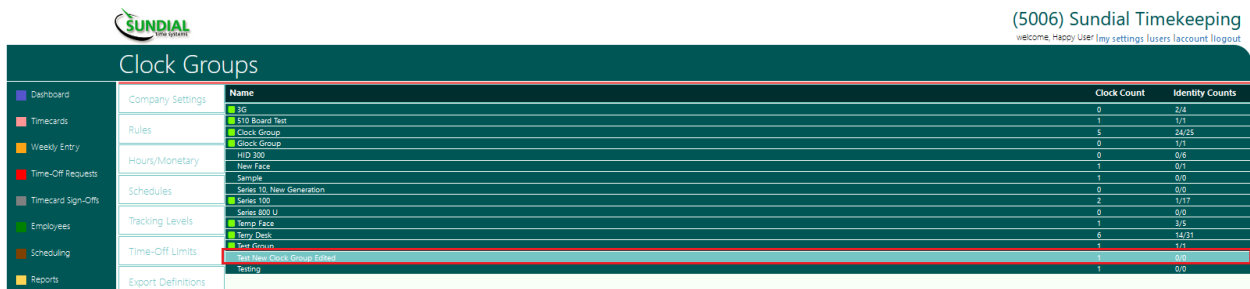


(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

	Name	Clock Count	Identity Counts
Company Settings	IG	0	2/4
Rules	S10 Board Test	1	1/1
	Clock Group	5	24/25
	Clock Group	0	1/1
Hours/Monetary	HID 300	0	0/8
	New Face	1	0/1
	Sample	1	0/0
Schedules	Series 10, New Generation	0	0/0
	Series 100	2	1/17
	Series 800 U	0	0/0
Tracking Levels	Temp Face	1	3/5
	Terry Desk	6	14/31
Time-Off Limits	Test Group	1	1/1
	Test New Clock Group Edited	1	0/0
	Testing	1	0/0

Once you click on a Team configuration the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

	Name	Clock Count	Identity Counts
Company Settings	IG	0	2/4
Rules	S10 Board Test	1	1/1
	Clock Group	5	24/25
	Clock Group	0	1/1
Hours/Monetary	HID 300	0	0/8
	New Face	1	0/1
	Sample	1	0/0
Schedules	Series 10, New Generation	0	0/0
	Series 100	2	1/17
	Series 800 U	0	0/0
Tracking Levels	Temp Face	1	3/5
	Terry Desk	6	14/31
Time-Off Limits	Test Group	1	1/1
	Test New Clock Group Edited	1	0/0
	Testing	1	0/0

Now you need to click on the “Delete” button as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

Name	Clock Count	Identity Counts
3G	0	2/4
510 Board Test	1	1/1
Clock Group	5	24/25
Clock Group	0	1/1
HID 300	0	0/0
New Face	1	0/1
Sample	1	0/0
Slide 10, New Generation	0	0/0
Series 100	2	1/17
Series 800 U	0	0/0
Temp Face	1	2/2
Tony Desk	6	14/31
Test Group	1	1/1
Test New Clock Group, Extra	1	0/0
Testing	1	0/0

Buttons: Add, Edit, **Delete** (Items: 15 (1))

Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

Name	Clock Count	Identity Counts
3G	0	2/4
510 Board Test	1	1/1
Clock Group	5	24/25
Clock Group	0	1/1
HID 300	0	0/0
New Face	1	0/1
Sample	1	0/0

Dialog: Delete Clock Groups
Do you wish to delete 1 clock group?
Buttons: Yes, No

In order to delete, you need to click “Yes” on this pop-up/overlay as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Groups

Name	Clock Count	Identity Counts
3G	0	2/4
510 Board Test	1	1/1
Clock Group	5	24/25
Clock Group	0	1/1
HID 300	0	0/0
New Face	1	0/1
Sample	1	0/0

Dialog: Delete Clock Groups
Do you wish to delete 1 clock group?
Buttons: **Yes**, No

Once you click “Yes” the system will then delete the selected configuration as shown below



Clock Groups

- Dashboard
- Timecards
- Weekly Entry
- Time-Off Requests
- Timecard Sign-Offs
- Employees
- Scheduling
- Reports

	Name	Clock Count	Identity Counts
Company Settings	3G	0	2/4
	510 Board Test	1	1/1
Rules	Clock Group	5	24/25
	Clock Group	0	1/1
Hours/Monetary	HID 300	0	0/0
	New Face	1	0/1
Schedules	Sample	1	0/0
	Series 10, New Generation	0	0/0
	Series 100	2	1/17
Tracking Levels	Series 100 JJ	0	0/0
	Temp Face	1	3/5
	Terry, Desk	6	14/31
Time-Off Limits	Test Group	1	1/1
	Testing	1	0/0
Employee Performance			

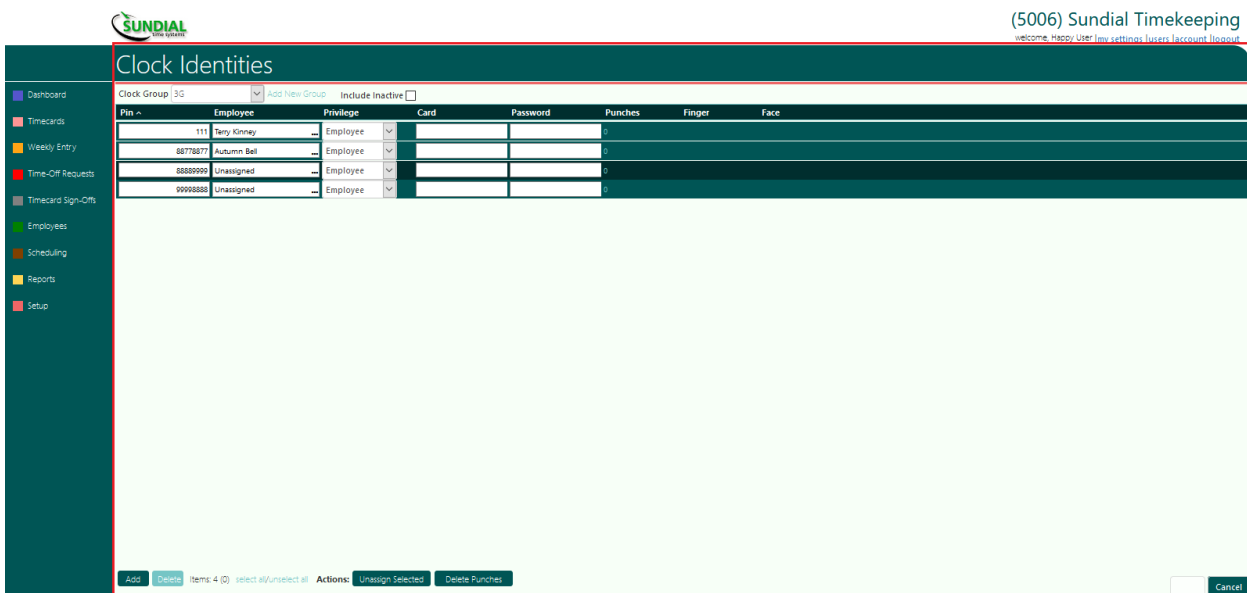
5.11.12. Clock Identities

Going into “Clock Identities”

In order to get in to the “**Clock identities**” you need to click on “**Clock Identities**” under the “**Setup**” section as shown below



Once you click on “**Clock Identities**” section, you will be navigated in to the “**Clock Identities**” page as shown below



Understanding Clock Identities

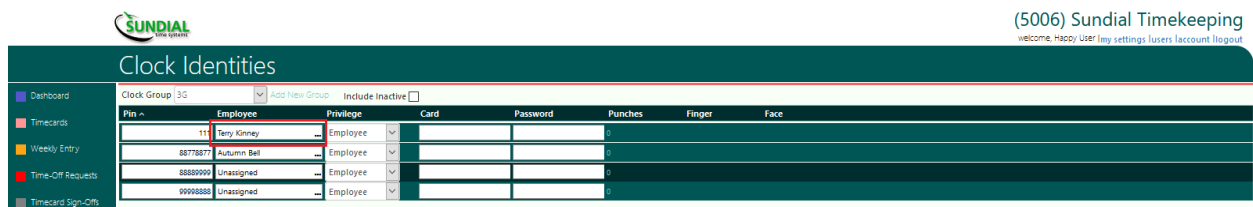
[Dropdown] Clock Group : Using this dropdown, you can choose any clock group that is available

[Link] Add New Group : Using this link, you can add New Groups

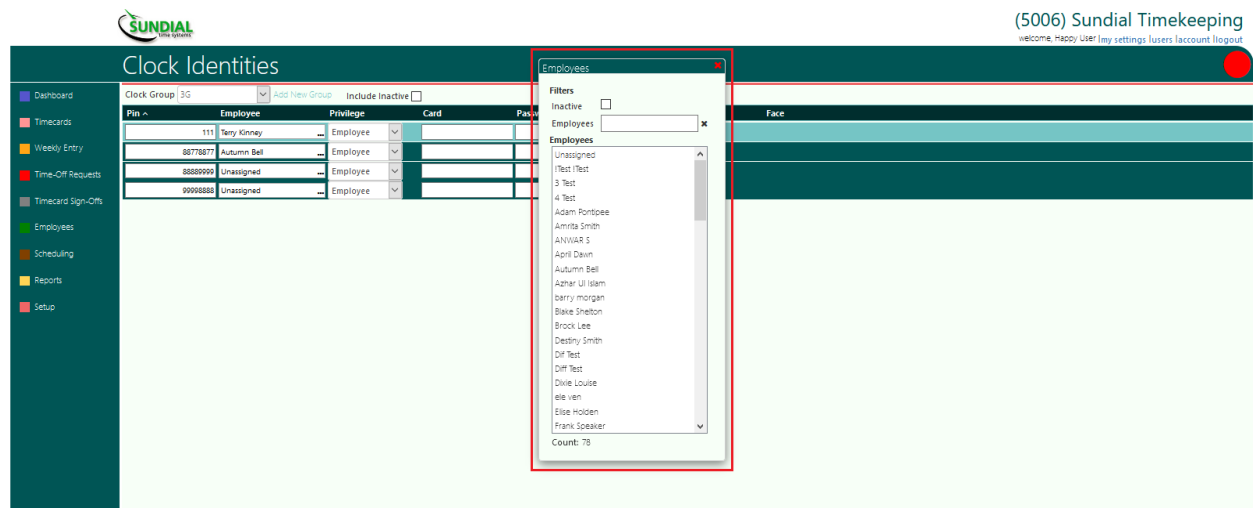
[Checkbox] Include Inactive : Using this checkbox, you can select to include inactive users. This will be unchecked by default and by checking this system will also include any inactive users

Pin : Using this field, you will be able to add Pin for the Clock identities

Employee : Using this field, you can click to choose the employees as shown below



Once you click on this, system will load an pop-up/overlay as shown below



When you check the checkbox inactive on this pop-up/overlay, system will also include any inactive employees on the list that is displayed

Once the required selection is made, the popup will automatically close. You can click on the close button on this overlay's right top corner to exit from the popup without selecting an employee

[Dropdown] Privilege : Using this dropdown you can choose their access privileges (i.e. Employee, Enroller or Administrator)

Card : Using this field, you can type in the proximity card value

Password : Using this field , you can add a password to the assigned clock identity.

Punches : This field will display any undelivered punches for the clock identity. This can only happen if the identity has not been associated with an employee. Once the employee association is created, any punches are automatically transferred to the employee's timesheet

Finger : This field will indicate any Finger scanner associated with the clock identity

Face : This field will indicate any Face scanner associated with this clock identity

Select all : Using this link, you can select all Clock Identities

Unselect all : Using this link, you can unselect all Clock Identities

Unassign Selected : Using this button, you will be able to unassign (Disassociate from Employee Records) any Clock Identities selected

Delete Punches : Use this button to delete any Undelivered Punches for selected records

Adding Clock Identities

In order to "Add" a Clock Identity you need to click on the "Add" button as shown below. (Added records are inserted at the top of the list)

The screenshot displays the 'Clock Identities' management interface. At the top, there is a header with the Sundial logo and user information: '(5006) Sundial Timekeeping' and 'welcome, hsp@vst.com | my settings | users | account | logout'. Below the header, there is a navigation sidebar on the left with options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area shows a table with the following columns: Pin, Employee, Privilege, Card, Password, Punches, Finger, and Face. The table contains three rows of data:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
111	Tary Kinney	Employee			0		
88778877	Autumn Bell	Employee			0		
88889999	Unassigned	Employee			0		
99998888	Unassigned	Employee			0		

At the bottom of the interface, there is a toolbar with buttons: Add, Delete, Items: 4 (0), select all, Unselect all, Actions, Unassign Selected, Delete Punches, Save, and Cancel. The 'Add' button is highlighted with a red box.

Once you click on the “Add” button, system will display a new line item of a clock identity added as show below

(5006) Sundial Timekeeping
welcome, Hedy User | my settings | users | account | logout

Clock Identities

Clock Group: 3G | Add New Group | Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
	Unassigned	Employee			0		
111	Terry Kinney	Employee			0		
88778877	Autumn Bell	Employee			0		
88889999	Unassigned	Employee			0		
99998888	Unassigned	Employee			0		

Buttons: Add, Delete, Items: 5 (0) | select all | Unselect all | Actions: Unassign Selected, Delete Punches | Save, Cancel

Once the relevant information is added, you can click on the “Save” button as shown below

(5006) Sundial Timekeeping
welcome, Hedy User | my settings | users | account | logout

Clock Identities

Clock Group: 3G | Add New Group | Include Inactive:

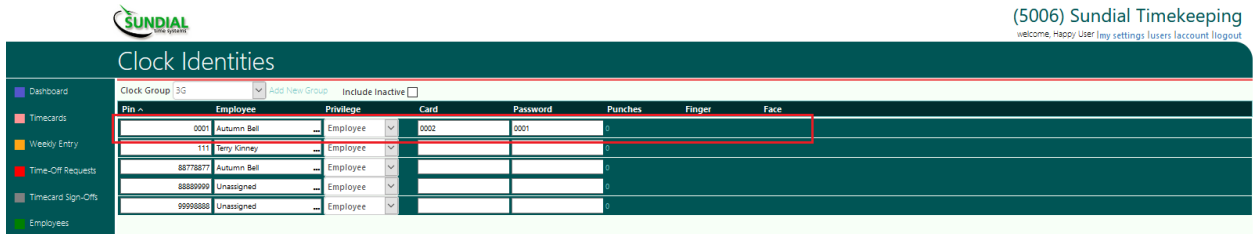
Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0001			
111	Terry Kinney	Employee			0		
88778877	Autumn Bell	Employee			0		
88889999	Unassigned	Employee			0		
99998888	Unassigned	Employee			0		

Buttons: Add, Delete, Items: 5 (1) | select all | Unselect all | Actions: Unassign Selected, Delete Punches | Save, Cancel

Once you click on “Save” system will save the added Clock Identity

Editing a Clock Identity

In order to “Edit” a Clock Identity, you need to first select the Clock Identity by clicking on it as shown below

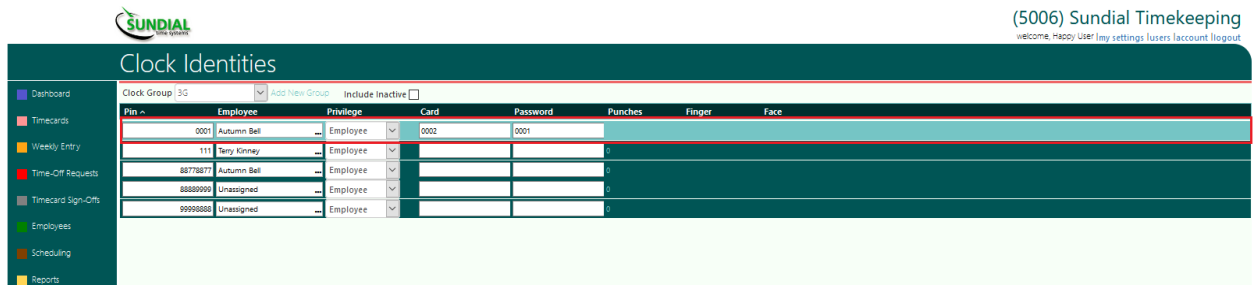


(5006) Sundial Timekeeping
welcome_h300 User / my settings / users / account / logout

Dashboard | Clock Group: 3G | Add New Group | Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0001			
111	Tary Kinney	Employee					
88778877	Autumn Bell	Employee					
88889999	Unassigned	Employee					
99998888	Unassigned	Employee					

Once you click on a Geofence the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



(5006) Sundial Timekeeping
welcome_h300 User / my settings / users / account / logout

Dashboard | Clock Group: 3G | Add New Group | Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0001			
111	Tary Kinney	Employee					
88778877	Autumn Bell	Employee					
88889999	Unassigned	Employee					
99998888	Unassigned	Employee					

Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below

The screenshot shows the 'Clock Identities' page in the Sundial Timekeeping system. The page title is 'Clock Identities' and the user is logged in as '(5006) Sundial Timekeeping'. The page contains a table with columns: Pin, Employee, Privilege, Card, Password, Punches, Finger, and Face. The table has five rows of data. At the bottom right, there is a 'Save' button which is disabled (greyed out) and a 'Cancel' button. The 'Add' and 'Delete' buttons are also visible at the bottom left.

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0001			
111	Tony Kinney	Employee					
88778877	Autumn Bell	Employee					
88889999	Unassigned	Employee					
99998888	Unassigned	Employee					

Once you make any changes the system will enable the “Save” button as shown below.

The screenshot shows the 'Clock Identities' page in the Sundial Timekeeping system. The page title is 'Clock Identities' and the user is logged in as '(5006) Sundial Timekeeping'. The page contains a table with columns: Pin, Employee, Privilege, Card, Password, Punches, Finger, and Face. The table has five rows of data. At the bottom right, there is a 'Save' button which is now enabled (highlighted in red) and a 'Cancel' button. The 'Add' and 'Delete' buttons are also visible at the bottom left.

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0001			
111	Tony Kinney	Employee					
88778877	Autumn Bell	Employee					
88889999	Unassigned	Employee					
99998888	Unassigned	Employee					

Once you click on the “Save” button the system will save any changes done

Deleting a Clock Identity

In order to “Delete” Clock Identity , you need to first select the “Clock Identity ” by clicking on it as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Identities

Clock Group: 3G Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0003			
111	Tary Kinney	Employee					
88778877	Autumn Bell	Employee					
88889999	Unassigned	Employee					
99998888	Unassigned	Employee					

Once you click on a Clock Identity the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Identities

Clock Group: 3G Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0003			
111	Tary Kinney	Employee					
88778877	Autumn Bell	Employee					
88889999	Unassigned	Employee					
99998888	Unassigned	Employee					

Items: 5 (1) select all/Unselect all Actions: Unassign Selected Delete Punches

Now you need to click on the “Delete” button as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Clock Identities

Clock Group: 3G Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
0001	Autumn Bell	Employee	0002	0003			
111	Tary Kinney	Employee					
88778877	Autumn Bell	Employee					
88889999	Unassigned	Employee					
99998888	Unassigned	Employee					

Items: 5 (1) select all/Unselect all Actions: Unassign Selected Delete Punches

Once you click on “Delete” the system delete the selected Clock Identity line item as shown below

(5006) Sundial Timekeeping
welcome, happy user | my settings | users | account | logout

Clock Identities

Clock Group: 3G | Add New Group | Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
111	Tary Kinney	Employee			0		
88778877	Autumn Bell	Employee			0		
88889999	Unassigned	Employee			0		
99998888	Unassigned	Employee			0		

Buttons: Add, Delete, Items: 4 (0) | select all | unselect all | Actions: Unassign Selected, Delete Punches

Buttons: Save, Cancel

Once this is deleted, you need to click on the “Save” button as shown below

(5006) Sundial Timekeeping
welcome, happy user | my settings | users | account | logout

Clock Identities

Clock Group: 3G | Add New Group | Include Inactive:

Pin	Employee	Privilege	Card	Password	Punches	Finger	Face
111	Tary Kinney	Employee			0		
88778877	Autumn Bell	Employee			0		
88889999	Unassigned	Employee			0		
99998888	Unassigned	Employee			0		

Buttons: Add, Delete, Items: 4 (0) | select all | unselect all | Actions: Unassign Selected, Delete Punches

Buttons: Save, Cancel

Once you click on the “Save” button, system will save any changes done

5.11.13. Punch Cycles

Punch Cycles is a place to set up a rule to keep employees On the Clock while they are working, but unable to punch in and out. This is designed for Offshore Workers who Clock in as they board a boat and remain On the Clock until they return to shore and Clock Out. Since the Max Shift Rule will prevent them from staying on the clock multiple days, this rule causes the system to generate a "New Shift" for any employee (that fits the criteria) and is On the Clock at Midnight.

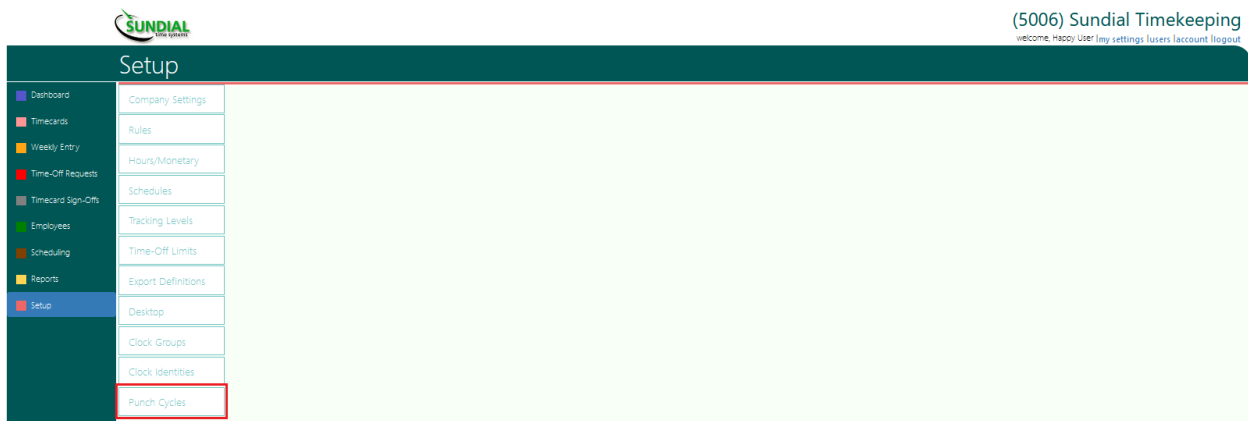
While it was designed for Offshore employees, several clients have found it useful for other types of employees that work multi-day and extended On-Call shifts. These include Emergency Service personnel such as Firefighters, Police, Ambulance, etc.

In order for this to work, the Company Max Shift rule must be at least 24:01 hours long.

Employees must be "Members" of the rule. They become members by being successfully included by a standard Employee Filter (Assigned to an Included Tracking Level or being Explicitly Included in the filter)

Going into "Punch Cycles"

In order to get in to the "Punch Cycles" you need to click on "Punch Cycles" under the "Setup" section as shown below



Once you click on "Punch Cycles" section, you will be navigated in to the "Punch Cycles" page as shown below

Name
pc

Understanding the “Punch Cycles”

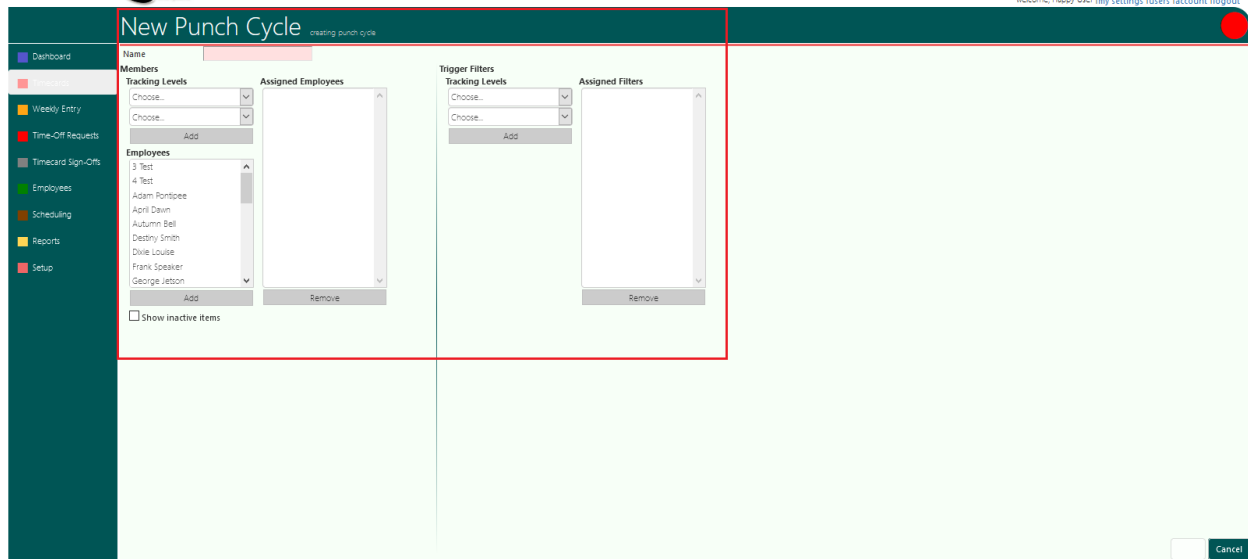
Name : This will display the name of the punch cycle

Adding Punch Cycles

In order to **“Add”** a Punch Cycle you need to click on the **“Add”** button as shown below

Name
pc

Once you click on the **“Add”** button, system will display the below screen as shown below



Understanding the New Punch Cycle Screen

Name : Using this field, you can add the “Name” for the New Punch Cycle

Members

Tracking Levels : Using these dropdowns, you will be able to choose the relevant tracking levels for the New Punch Cycle

[Button] Add : Using this button, you will be able add the above selected Tracking Levels

Employees : Using this, you will be able to add the relevant employees for the New Punch Cycle

[Button] Add : Using this button, you will be able add Employees

[Checkbox] Show inactive items : Using this checkbox, you can define if inactive employees need to be displayed on the employees section. This will be unchecked by default and checking this will list all inactive employees also under the employees list that is loaded on this section

Assigned Employees : This section will display any added Employees

Remove : Using this button, you will be able to remove any Employees that are added

Trigger Filters

If the Trigger Filter is empty, every Member employee qualifies. If the Trigger Filter is used, then the employee only qualifies if their Clock In record is assigned to a Tracking Level Item that is included in the Trigger filter

Tracking Levels : Using these dropdowns, you will be able to choose the relevant tracking levels for the Trigger Filter

[Button] Add : Using this button, you will be able add the above selected Tracking Levels

Assigned Filters: This section will display any assigned filters

Remove : Using this button, you will be able to remove any filters that are added

Once the required information is entered, you can click on the “Save” button as shown below

The screenshot shows the 'New Punch Cycle' form in the Sundial Timekeeping system. The form is titled 'New Punch Cycle' and has a sub-header 'creating punch cycle'. It features a sidebar with navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, Timecard Sign-Offs, Employees, Scheduling, Reports, and Setup. The main content area is divided into several sections:

- Name:** A text input field containing 'New Test Punch Cycle'.
- Members:** A section with a 'Tracking Levels' dropdown menu (containing 'Department' and 'Distribution') and an 'Add' button.
- Assigned Employees:** A list of employees: Autumn Bell, Destiny Smith, and Dixie Louise, with a 'Remove' button below.
- Employees:** A list of employees: 3 Test, 4 Test, Adam Rontbee, April Dawn, Frank Speaker, George Jetson, Helen Joy, Hope Eternal, and Jane Doe, with an 'Add' button below.
- Trigger Filters:** A section with a 'Tracking Levels' dropdown menu (containing 'Choose...') and an 'Add' button.
- Assigned Filters:** An empty list with a 'Remove' button below.

At the bottom right of the form, there are 'Save' and 'Cancel' buttons. The top right corner of the interface displays '(5006) Sundial Timekeeping' and a user profile with options: 'welcome, Happy User | my settings | users | account | logout'.

Once you click on “Save” system the system will save the Punch Cycle as shown below

The screenshot shows the 'Punch Cycles' list in the Sundial Timekeeping system. The list is titled 'Punch Cycles' and has a sub-header 'Name'. It features a sidebar with navigation options: Dashboard, Timecards, Weekly Entry, Time-Off Requests, and Timecard Sign-Offs. The main content area is a table with the following columns and data:

Company Settings	Name
Rules	New Test Punch Cycle
Hours/Monetary	PC
Schedules	

At the bottom right of the interface, there are 'Save' and 'Cancel' buttons. The top right corner of the interface displays '(5006) Sundial Timekeeping' and a user profile with options: 'welcome, Happy User | my settings | users | account | logout'.

Editing a Punch Cycle

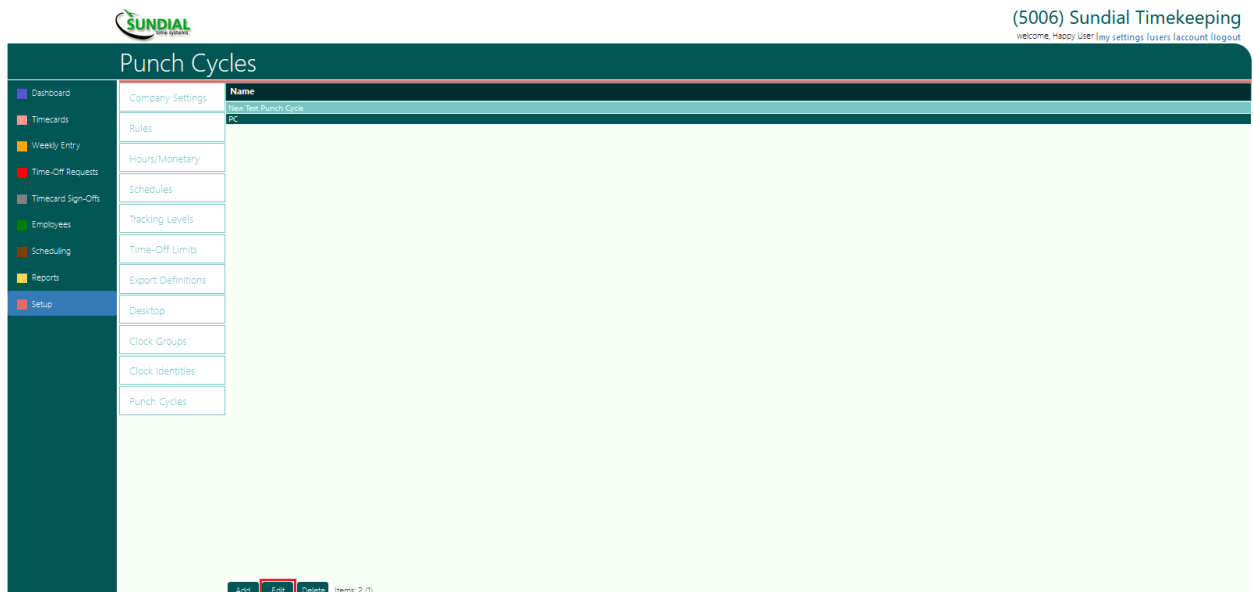
In order to **“Edit”** Punch Cycle, you need to first select the Punch Cycle by clicking on it as shown below



Once you click on a Punch Cycle the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



Now you need to click on the **“Edit”** button as shown below



Once the **“Edit”** button is clicked the system will load the Punch Cycles in an editable mode as shown below. You will now be able to make any changes to existing rule values.

New Test Punch Cycle edit punch cycle

Name:

Members

Tracking Levels

Choose...
Choose...
Add

Assigned Employees

Employees

- Autumn Bell
- Destiny Smith
- Dixie Louise

Remove

Trigger Filters

Tracking Levels

Choose...
Choose...
Add

Assigned Filters

Remove

Employees

- 3 Test
- 4 Test
- Adam Pontbee
- April Davin
- Frank Speaker
- George Jetson
- Helen Joy
- Hope Eternal
- Jane Doe

Add

Show inactive items

Cancel

Until any changes are made to any existing values, the “Save” button will be in a disabled state as shown below

New Test Punch Cycle edit punch cycle

Name:

Members

Tracking Levels

Choose...
Choose...
Add

Assigned Employees

Employees

- Autumn Bell
- Destiny Smith
- Dixie Louise

Remove

Trigger Filters

Tracking Levels

Choose...
Choose...
Add

Assigned Filters

Remove

Employees

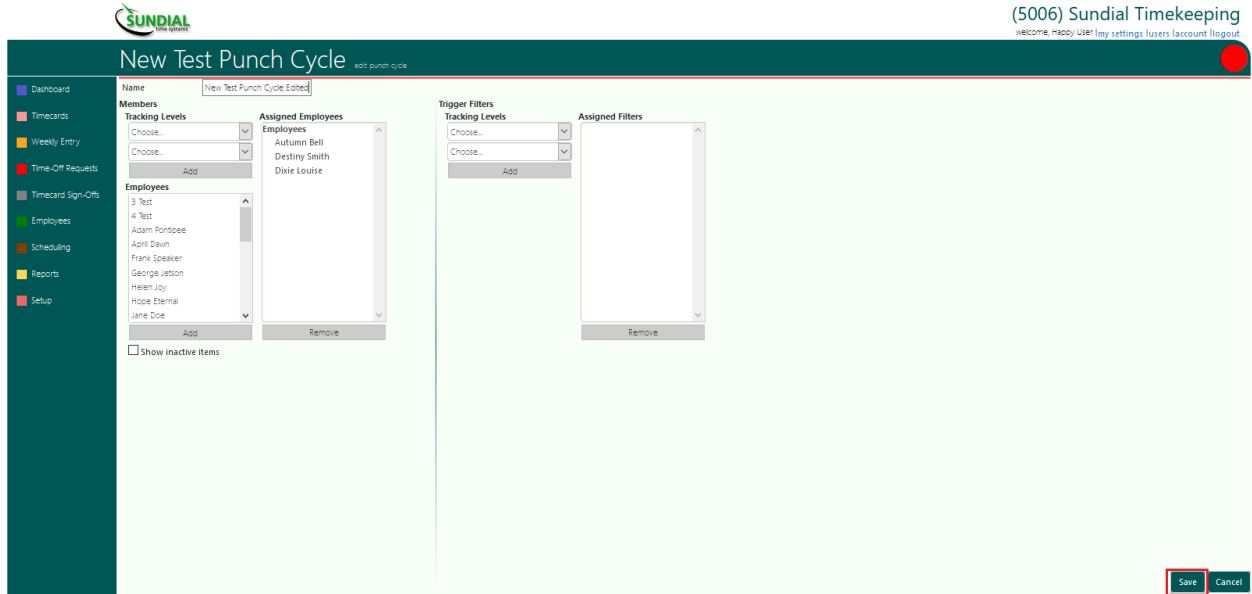
- 3 Test
- 4 Test
- Adam Pontbee
- April Davin
- Frank Speaker
- George Jetson
- Helen Joy
- Hope Eternal
- Jane Doe

Add

Show inactive items

Save

Once you make any changes the system will enable the “Save” button as shown below.



Once you click on the **“Save”** button the system will save any changes done

Deleting a Punch Cycle

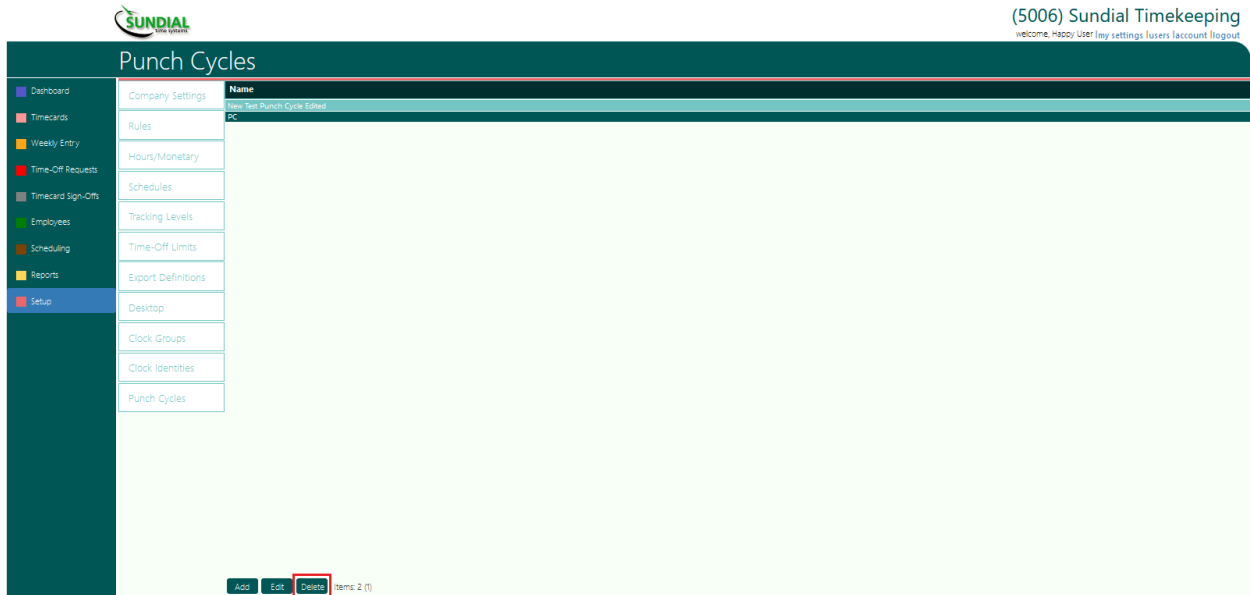
In order to **“Delete”** Punch Cycle, you need to first select the **“Punch Cycle”** by clicking on it as shown below



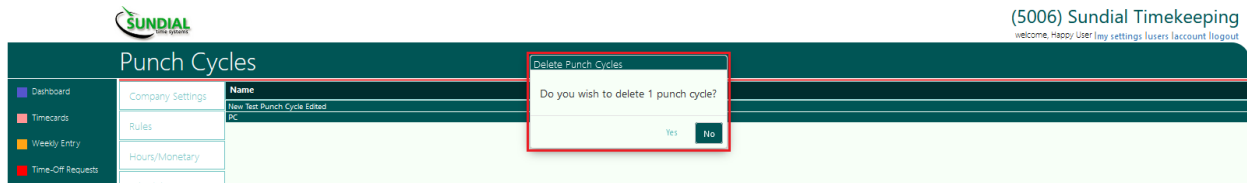
Once you click on a Punch Cycle the selected line item will be shaded with a lighter complexion to help you differentiate them from the rest as shown below



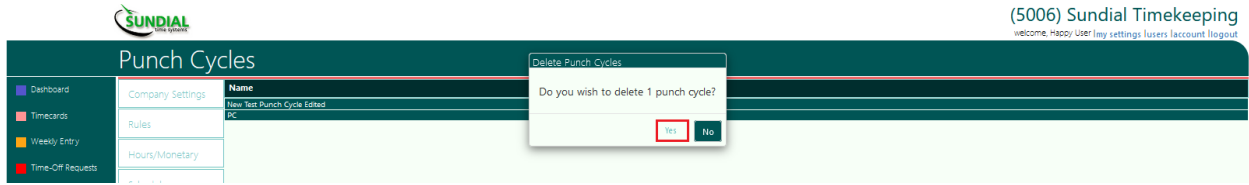
Now you need to click on the “Delete” button as shown below



Once you click on “Delete” the system will display a pop-up/overlay asking your confirmation as shown below



In order to delete, you need to click “Yes” on this pop-up/overlay as shown below



Once you click “OK” the system will then delete the selected configuration as shown below

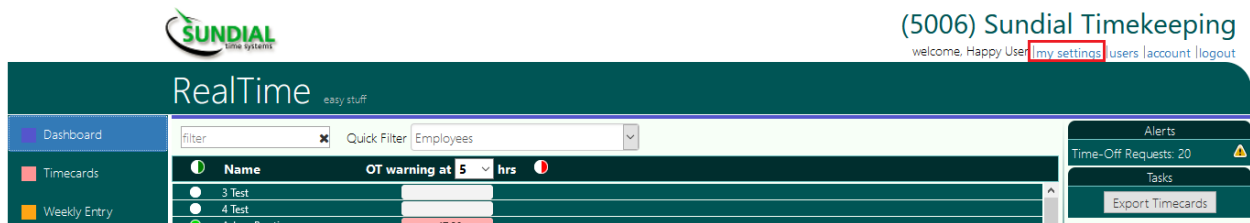


5.12. My Settings

This section shows details that are relevant to the logged in user. Some of the information you see on this section may vary based on each of the user types and their authority and access levels.

5.12.1. Going into My Settings

When you click on **“My Settings”** on the User and Account controls (Section I), you will be navigated to the **“My Settings”** page.



5.12.2. My Settings Page

Shown below is the **“My setting page”** that you would get navigated in to

“My setting page” will have two main tabs as **“General”** and **“Notifications”** as shown below

General tab will be selected by default.



5.12.3. My Settings Page (General Section)

In the “My Setting Page - General section” There are 3 sub sections sections as as shown below

The screenshot shows the 'My Settings' page for a user named 'Happy User'. The page is divided into three sections: Section A (General Information), Section B (Security), and Section C (Preferences). Section A includes fields for Username, First Name, Last Name, Email, Mobile Phone, Password, and Confirm Password. Section B includes a dropdown for User role. Section C includes dropdowns for Time Format, Duration Format, Full Name Format, Quick Filter, Note Status Type, and Note Status Indicator. A 'Cancel' button is visible at the bottom right.

Sub Section details

- **General information**
 - **Username** - This shows the current username of the logged in user.
 - This is an editable field which allows the logged in user to change their current username.
 - Users can change their usernames as long as the changed username is not already in use.
 - The system will run a duplicate check when the Save is requested. In the event if the duplicate check fails, a red border is placed on the Username field and the save attempt is canceled. Edits to other fields are not lost.
 - Usernames cannot be blank and they must be unique from other users in the account. They can be the same as a WebConnect Username from an employee record. Employee WebConnect Usernames must also be unique from other employees within the account.

- **First Name** - This section allows the user to enter/update their first name.
- **Last Name** - This sections allows the user to enter/update their last name
- **Email** - this section allows the user to enter their email address. In the event if the email address provided is invalid, system would highlight this cell in red & display the following error message “**Invalid e-mail address format.**” In order to add multiple email addresses, you will have to separate each email address with a semicolon.
- **Mobile Phone** - This field allows the user to enter their mobile phone number. This is needed if you are planning to receive “Text Notifications”.
- **Password** - This section allows the user to change their existing password
 - System will run a field level validation to check if the field is empty. In the event if this is empty, the system will not allow you to proceed further.
 - Currently, there is no complexity rule assigned for the passwords and therefore users are free to have a password of their choice
 - When users get started with the system, they will be provided a temporary password by their manager. At their first log-in to the system, they will be prompted to change their temporary password. In such cases, users are expected to provide a new password which is different to the tempertory password.
 - Except for the above mentioned scenario, users are generally allowed to re-use of one their previous passwords
 - Currently there aren't any password expiration duraitions set in the system. Due to this, users are allowed to use their password up to any duration they wish or until their next password change
- **Confirm Password** - This section is used to re-confirm the password entered in the password field. In the event if both fields mismatch, system would highlight this cell in cell in red & display the following error message “**Confirm password does not match password**”
- **Security**
 - **User Role** - System will not allow any user to modify their own role.
 - **Whitelist enabled** (check box) - This is not part of my settings by default. This will only be visible to an authorized user if they are creating or modifying another user’s account.
- **Preferences**
 - **Time Format** - This selection allows you to set your preferred time format either on “12 Hour” or “24 hours” format
 - **Duration Format** - Duration format preference can be changed either to “Hours and Minutes” or “Hours and Decimals” format
 - **Full Name Format** - This section allows you to define how you wish to sort your employees records when you see them. If you choose “First last” the records will be sorted based on the First name alphabetically. But if you choose “Last First” then the records will be sorted and listed based on the last name alphabetically. This selection will

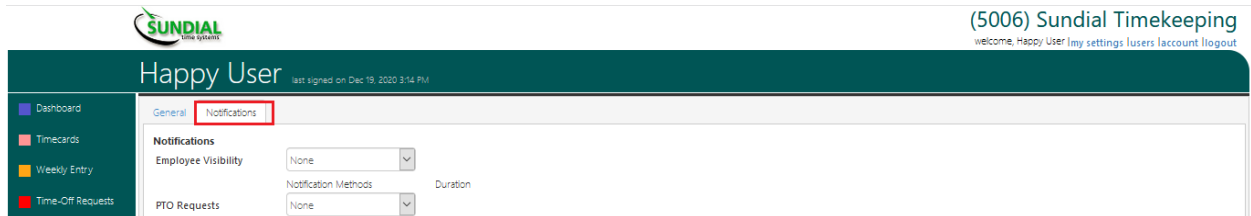
impact the way how records are displayed to you on both the system screens and also on reports

- **Quick Filter** - The QuickFilter is a common section that will instantly swap one group for another. QuickFilters are based on the User applying a "QuickFilter" Tracking Level (located in "my settings" on the upper right). Once a QuickFilter Level is specified, the User needs only to select one of the Items in that level to change their view to include only the employees that are assigned to the selected Tracking Item. Value specified for the QuickFilter will be maintained during the User's session until modified again or logged out
- **Note Status Type** - This selection allows you to select your preference on the notes type. It has two options as "Shared" and "Individual". If you choose the "Shared" option, if anybody has read a note, then it will be marked as read for you too. If you choose to have the "Individual" option, Every note will remain unread until you read it yourself.
- **Note Status Indicator** - Notes Status Indicator selections. Those are "Spinning" and "Static".
 - An unread note can be set to "Spinning" status. This lets you know at a glance that the note is unread.
 - For users that are not normally responsible for notes, they can set the note to be Static, so that the activity on the screen isn't distracting.
 - Note Status Type is set to Shared or Individual.
 - If it's shared, the spinning will stop if any user has read the note.
 - If it's individual, then every note must be read personally to stop it from spinning (or set your personal rule to "Static")

5.12.4. My Settings Page (Notifications Section)

This section allows you to set up your own notifications, on the things that you would like to get yourself notified about.

In order to go to the “**Notifications**” section, you need to simply click on the “**Notifications tab**” it as show below

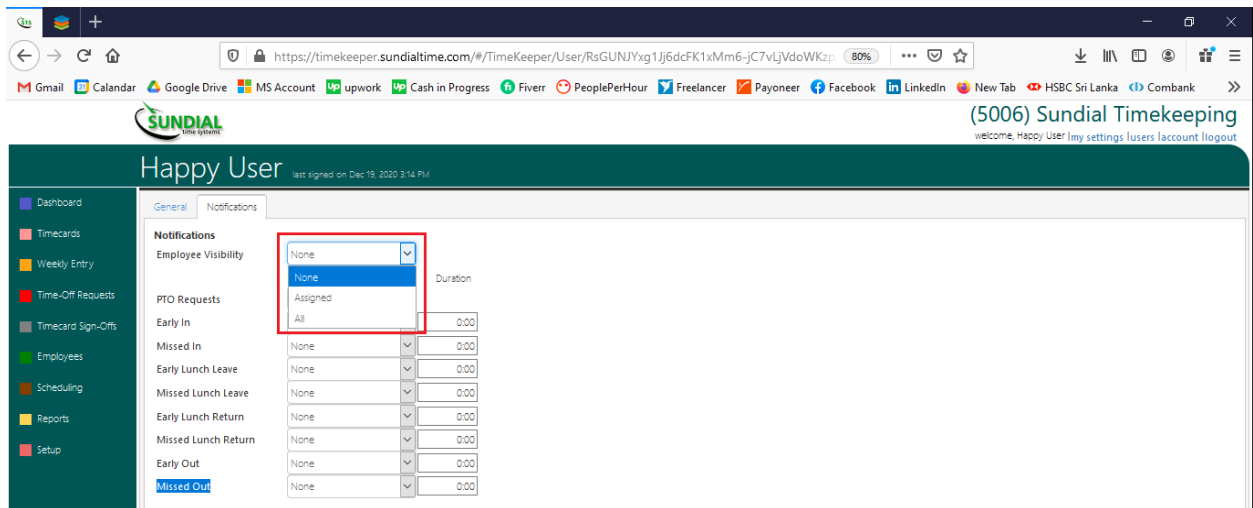


Understanding the Types of Notifications in the Notification Section

The Notification section of the system, has the below types of notifications that you can enable based on your preference

1. **Employee Visibility** - Using this, you will be able to define, what type of employees you will be monitoring notifications on or you wish to receive notifications on
 - a. **None** : If you set it up for “**None**”, you will not receive any notifications on any employees
 - b. **Assigned** : If you set it up for “**Assigned**”, you will only receive notifications on any employees whom you are assigned as a direct supervisor
 - c. **All** : If you set it up for “**All**”, you will only receive notifications on all employees that are visible to you

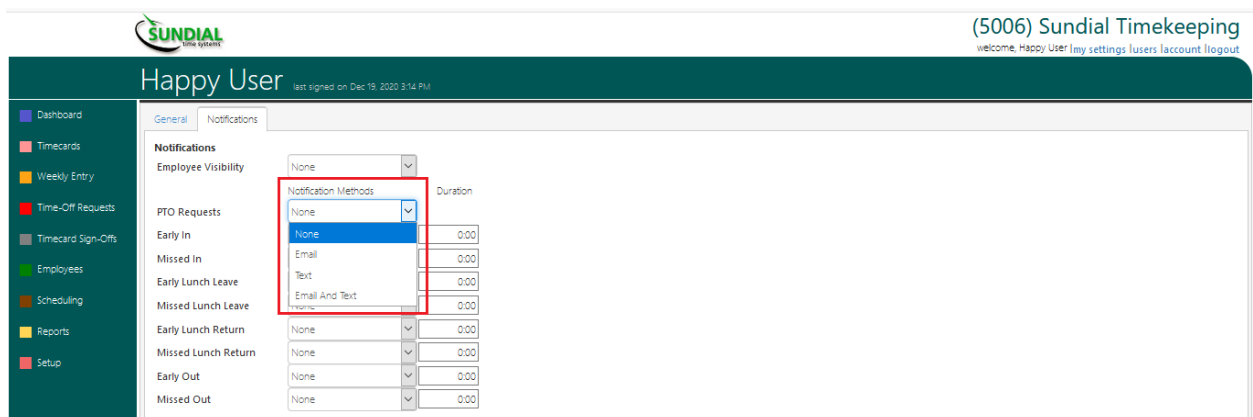
You can choose any of the above options using the “**Employee visibility**” dropdown as shown below



2. PTO Requests - Using this, you will be able to define the notification method(s) you prefer when an employee requests **Time Off**

- a. None** : If you set it up for “None”, you will not receive any notifications on any of the methods available
- b. Email** : If you set it up for “Email”, you will only receive email notifications
- c. Text** : If you set it up for “Text”, you will only receive text notifications
- d. Email And Text** : If you set it up for “Email And Text”, you will receive both email and text notifications

You can choose any of the above options using the “**PTO Requests**” dropdown as shown below



3. **Early In** - Using this, you will be able to define the notification method(s) that you prefer when an employee **clocks in Early**.

- a. **None** : If you set it up for “None”, you will not receive any notifications on any of the methods available
- b. **Email** : If you set it up for “Email”, you will only receive email notifications
- c. **Text** : If you set it up for “Text”, you will only receive text notifications
- d. **Email And Text** : If you set it up for “Email And Text”, you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the “Duration” which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the “Early In” duration to **30 minutes**, you will receive notifications for employees that **clock in early by 30 minutes or more**.

Now, suppose that the employee’s shift starts at **7:00AM** but **they clock in at 6:30AM** or before, then the system will send a notification out.

You can set any of the above options using the “Early In” dropdown as shown below

The screenshot shows the Sundial Timekeeping interface for user 'Happy User'. The 'Notifications' tab is active, displaying a table of notification settings. The 'Early In' row is highlighted with a red box, and its dropdown menu is open, showing the following options: None, Email, Text, and Email And Text. The duration for 'Early In' is set to 10:00. Other notification methods like 'Missed In', 'Early Lunch Leave', etc., are also listed with their respective notification methods and durations.

Notification Method	Notification Methods	Duration
Employee Visibility	None	
PTO Requests	None	
Early In	None	10:00
Missed In	None	0:00
Early Lunch Leave	Email	0:00
Missed Lunch Leave	Text	0:00
Early Lunch Return	Email And Text	0:00
Missed Lunch Return	None	0:00
Early Out	None	0:00
Missed Out	None	0:00

4. **Missed In** - Using this, you will be able to define the notification method(s) that you prefer when an employee **misses their Clock in**.

- a. **None** : If you set it up for “None” you will not receive any notifications on any of the methods available
- b. **Email** : If you set it up for “Email” you will only receive email notifications
- c. **Text** : If you set it up for “Text” you will only receive text notifications
- d. **Email And Text** : If you set it up for “Email And Text” you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the “Duration” which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the “Missed in” duration to **30 minutes**, you will receive notifications for employees that **Failed to clock in** within **30 minutes** of their Scheduled Start Time.

Now, suppose that the employee’s shift starts at **7:00AM** but **they still haven’t clocked in** at 7:30AM or before, then the system will send a notification out.

You can set any of the above options using the “Missed In” dropdown as shown below

The screenshot shows the Sundial Timekeeping interface for user 'Happy User'. The 'Notifications' section is active, displaying a table of notification settings. The 'Missed In' row is highlighted with a red box, and its dropdown menu is open, showing 'Email And Text' selected. The 'Duration' for 'Missed In' is 0:00.

Notification Type	Notification Methods	Duration
Employee Visibility	None	
PTO Requests	None	
Early In	None	10:00
Missed In	None, Email, Text, Email And Text	0:00
Early Lunch Leave	None	0:00
Missed Lunch Leave	None	0:00
Early Lunch Return	None	0:00
Missed Lunch Return	None	0:00
Early Out	None	0:00
Missed Out	None	0:00

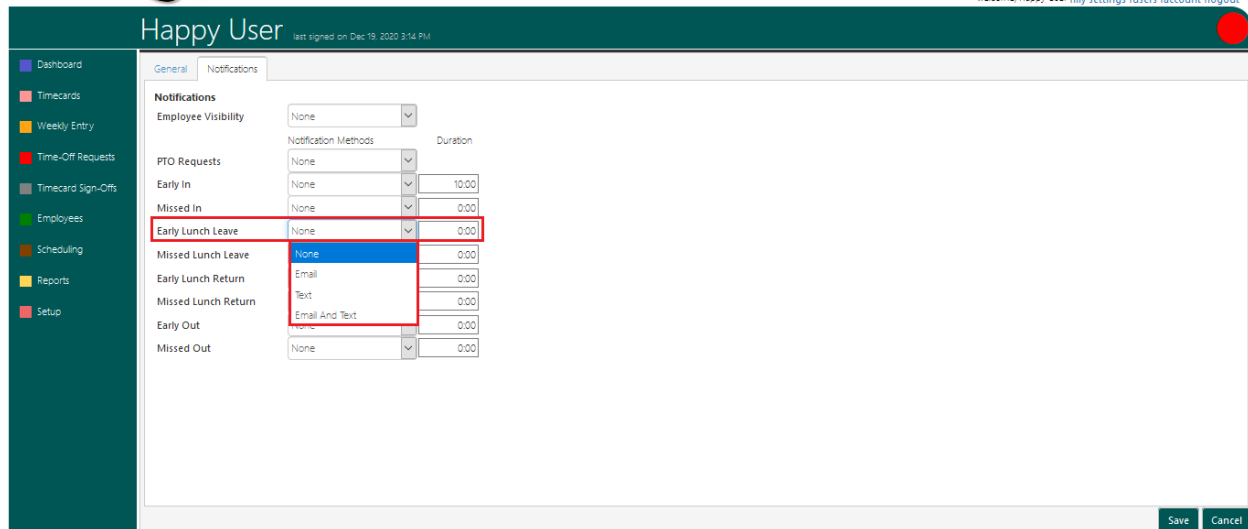
5. **Early Lunch Leave** - Using this, you will be able to define the notification method(s) that you prefer when an employee **Leaves Early for Lunch**.
- a. **None** : If you set it up for “**None**”, you will not receive any notifications on any of the methods available
 - b. **Email** : If you set it up for “**Email**”, you will only receive email notifications
 - c. **Text** : If you set it up for “**Text**”, you will only receive text notifications
 - d. **Email And Text** : If you set it up for “**Email And Text**”, you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the “**Duration**” which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the “**Early Lunch Leave**” duration to **30 minutes**, you will receive notifications for employees that **clock out for Lunch** 30 or more minutes early.

Now, suppose that the employee’s lunch period starts at **12:00PM** but **they clock out** at 11:30AM or earlier, then the system will send a notification out.

You can set any of the above options using the “**Early Lunch Leave**” dropdown as shown below



6. Missed Lunch Leave - Using this, you will be able to define the notification method(s) that you prefer when an employee **misses their Lunch Leave punch**.

- a. None :** If you set it up for “None” you will not receive any notifications on any of the methods available
- b. Email :** If you set it up for “Email” you will only receive email notifications
- c. Text :** If you set it up for “Text” you will only receive text notifications
- d. Email And Text :** If you set it up for “Email And Text” you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the “Duration” which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the “Missed Lunch Leave” duration to **30 minutes**, you will receive notifications for employees that **Failed to clock out for lunch** within **30 minutes** of their Scheduled Lunch Start Time.

Now, suppose that the employee’s lunch period starts at **12:00PM** but **they haven’t clocked out** by 12:30PM, then the system will send a notification out.

You can set any of the above options using the “**Missed Lunch Leave**” dropdown as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Happy User last signed on Dec 19, 2020 3:14 PM

	Notification Methods	Duration
Employee Visibility	None	
PTO Requests	None	
Early In	None	10:00
Missed In	None	0:00
Early Lunch Leave	None	0:00
Missed Lunch Leave	None	0:00
Early Lunch Return	None	0:00
Missed Lunch Return	Email	0:00
Early Out	Text	0:00
Missed Out	Email And Text	0:00

Save Cancel

7. **Early Lunch Return** - Using this, you will be able to define the notification method(s) that you prefer when an employee **Returns Early from Lunch**.
 - a. **None** : If you set it up for “**None**”, you will not receive any notifications on any of the methods available
 - b. **Email** : If you set it up for “**Email**”, you will only receive email notifications
 - c. **Text** : If you set it up for “**Text**”, you will only receive text notifications
 - d. **Email And Text** : If you set it up for “**Email And Text**”, you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the “**Duration**” which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the “**Early Lunch Return**” duration to **30 minutes**, you will receive notifications for employees that **clock in from Lunch 30 or more minutes early**.

Now, suppose that the employee's lunch period ends at **1:00PM** but **they clock back in** at 12:30PM or earlier, then the system will send a notification out.

You can set any of the above options using the **"Early Lunch Return"** dropdown as shown below

The screenshot shows the 'Notifications' settings for 'Happy User'. The 'Early Lunch Return' dropdown is highlighted with a red box, and its menu is open, showing options: None, Email, Text, and Email And Text. The 'Duration' for 'Early Lunch Return' is set to 0:00. Other notification methods and durations are also visible in the table below.

Notification Method	Duration
Employee Visibility	None
PTO Requests	None
Early In	None
Missed In	None
Early Lunch Leave	None
Missed Lunch Leave	None
Early Lunch Return	None
Missed Lunch Return	None
Early Out	Email
Missed Out	Text

8. Missed Lunch Return - Using this, you will be able to define the notification method(s) that you prefer when an employee **misses their Lunch Return**.

- a. **None** : If you set it up for **"None"** you will not receive any notifications on any of the methods available
- b. **Email** : If you set it up for **"Email"** you will only receive email notifications
- c. **Text** : If you set it up for **"Text"** you will only receive text notifications
- d. **Email And Text** : If you set it up for **"Email And Text"** you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the **"Duration"** which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the **"Missed Lunch Return"** duration to **30 minutes**, you will receive notifications for employees that **Failed to clock in** within **30 minutes** of their scheduled Lunch End.

Now, suppose that the employee's lunch period ends at **1:00PM** but **they still haven't clocked back in** at 1:30PM, then the system will send a notification out.

You can set any of the above options using the **"Missed Lunch Return"** dropdown as shown below

(5006) Sundial Timekeeping
welcome, Happy User | my settings | users | account | logout

Happy User last signed on Dec 19, 2020 3:14 PM

Event	Notification Methods	Duration
Employee Visibility	None	
PTO Requests	None	
Early In	None	10.00
Missed In	None	0.00
Early Lunch Leave	None	0.00
Missed Lunch Leave	None	0.00
Early Lunch Return	None	0.00
Missed Lunch Return	None	0.00
Early Out	None	0.00
Missed Out	None	0.00

9. Early Out - Using this, you will be able to define the notification method(s) that you prefer when an employee **Clocks Out Early**.

- a. **None** : If you set it up for **"None"**, you will not receive any notifications on any of the methods available
- b. **Email** : If you set it up for **"Email"**, you will only receive email notifications
- c. **Text** : If you set it up for **"Text"**, you will only receive text notifications
- d. **Email And Text** : If you set it up for **"Email And Text"**, you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the “**Duration**” which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the “**Early Out**” duration to **30 minutes**, you will receive notifications for employees that **clock out** 30 or more minutes early.

Now, suppose that the employee’s shift ends at **5:00PM** but **they clock out** at 4:30PM or earlier, then the system will send a notification out.

You can set any of the above options using the “**Early Out**” dropdown as shown below

The screenshot shows the 'Notifications' settings page in the Sundial Timekeeping system. The page is titled 'Happy User' and shows the user is logged in. The 'Notifications' section is active, and the 'Early Out' row is highlighted with a red box. The 'Notification Methods' dropdown menu is open, showing the following options: None, Email, Text, and Email And Text. The 'Duration' for 'Early Out' is set to 0:00. Other rows include Employee Visibility, PTO Requests, Early In, Missed In, Early Lunch Leave, Missed Lunch Leave, Early Lunch Return, Missed Lunch Return, and Missed Out.

Event	Notification Methods	Duration
Employee Visibility	None	
PTO Requests	None	
Early In	None	10:00
Missed In	None	0:00
Early Lunch Leave	None	0:00
Missed Lunch Leave	None	0:00
Early Lunch Return	None	0:00
Missed Lunch Return	None	0:00
Early Out	None	0:00
Missed Out	None	0:00

10. Missed Out - Using this, you will be able to define the notification method(s) that you prefer when an employee **misses their Clock Out**.

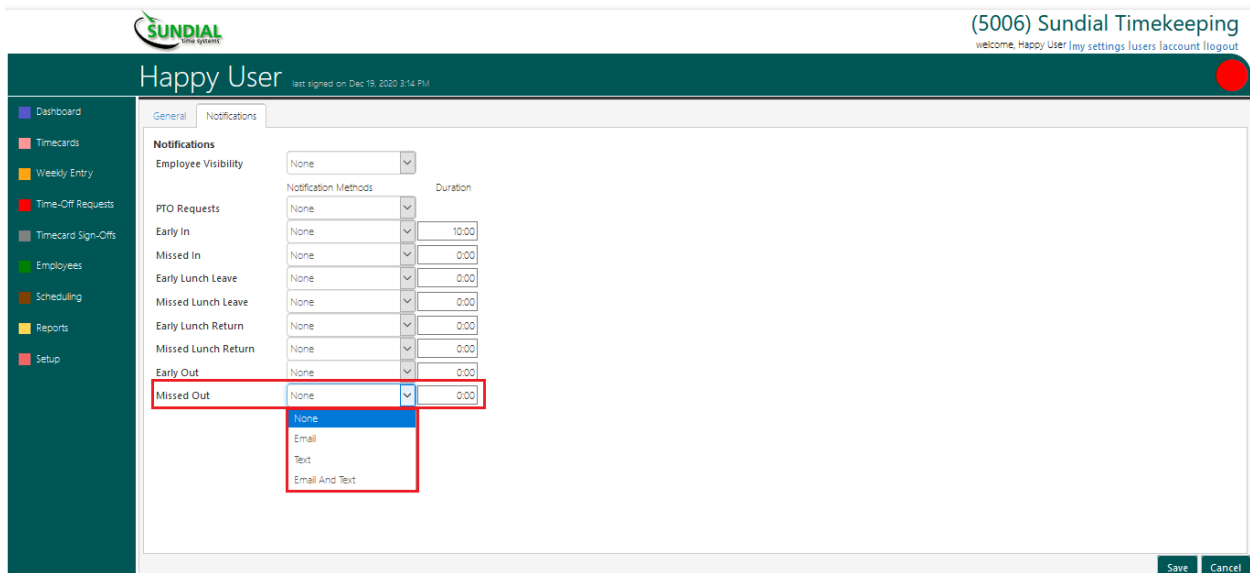
- a. **None** : If you set it up for “**None**” you will not receive any notifications on any of the methods available
- b. **Email** : If you set it up for “**Email**” you will only receive email notifications
- c. **Text** : If you set it up for “**Text**” you will only receive text notifications
- d. **Email And Text** : If you set it up for “**Email And Text**” you will receive both email and text notifications

In addition to specifying a Notification Method, there is a text box to enter the “**Duration**” which will allow you to specify the early threshold in [hours:minutes].

For example, Suppose you set the “**Missed Out**” duration to **30 minutes**, you will receive notifications for employees that **Failed to clock out** within **30 minutes** of their scheduled Shift End.

Now, suppose that the employee’s shift ends at **5:00PM** but **they still haven’t clocked out** by 5:30PM, then the system will send a notification out.

You can set any of the above options using the “**Missed Out**” dropdown as shown below



5.13. Employee Sync

Appendix 1 - Employee Sync File

Employee Sync File Format

Employee Sync File is a Comma Separated Values text file, commonly referred to as a “CSV” file. Each line of the file is a record and each comma separates the record into fields, similar to how an Excel file uses a grid to display Rows and Columns. The Rows are records and the Columns are fields. The concept is so similar that Excel can natively open CSV files, and can easily save tables of data into CSV formatted files.

Now, building on that, for importing data into Timekeeper, your CSV file must use the first row of the file as the header. The header is the list of Field Names and Timekeeper uses that to understand what to expect in the remaining rows. Your columns can be in any order. Empty fields are ignored. When Creating an employee record, default values are applied for empty fields. When Updating an existing employee record, the existing value is left unmodified when the Sync file has an empty value. To explicitly remove a value from an existing record, enter the text “!clear”, without quotes. To delete an employee record through the Sync file, enter the text “!delete”, without quotes, in either the FirstName or LastName column.

Example:

	Field 1	Field 2	Field 3	Field 4	Field 5
Row 1	Row 1/Field 1	Row 1/Field 2	Row 1/Field 3	Row 1/Field 4	Row 1/Field 5
Row 2	Row 2/Field 1	Row 2/Field 2	Row 2/Field 3	Row 2/Field 4	Row 2/Field 5
Row 3	Row 3/Field 1	Row 3/Field 2	Row 3/Field 3	Row 3/Field 4	Row 3/Field 5
Row 4	Row 4/Field 1	Row 4/Field 2	Row 4/Field 3	Row 4/Field 4	Row 4/Field 5

This visual shows how the software will use the structure to turn it into usable data.

	EmployeeId	FirstName	MiddleName	LastName	HireDate
Row 1	1001	April	H	Dawn	4/13/2009
Row 2	1002	Joseph	Nicholas	Jackson	8/19/2010
Row 3	1003	Susan		King	3/1/2015
Row 4	1004	David	R	Feldman	11/17/2019

Columns can be in any order - Just be certain that the required columns are included. Field Values can be left empty. When creating an and employee record through the Sync file, and

Required Fields

There are three required fields:

- **EmployeeId** : This must be unique within a Company. Max 50 characters.
- **FirstName** : Employee's first name, max 35 characters.
- **LastName** : Employee's last name, max 35 characters.

Optional Fields

There are several optional fields. Parenthesis provide additional information about the field.

Two part fields with period separator

Field names that are followed by a period and single quotes means that the field must include the period and the name of the relevant item (i.e. TrackingLevel.**Department**).

Two part fields with Square Brackets

Field names that are followed by square brackets containing a period and text allows you to be explicit about a data group. If you have multiple groups, the group name should be included (i.e. IdentityPin.**Clock Group 1**)

CompanyId (max 50 chars. Match to SSO CompanyID, required for multi-company Sync from Reseller)

IsActive (1 for active, 0 for inactive)

OvertimeRuleName (max 50 chars)

HolidayRuleName (max 50 chars)

PayPeriodRuleName (max 50 chars)

AccrualPlanName (max 50 chars)

DifferentialGroupName (max 50 chars)

WebConnectName

TrackingLevel1 (value can be either name or tracking code)

TrackingLevel2 (value can be either name or tracking code)

TrackingLevel3 (value can be either name or tracking code)

TrackingLevel4 (value can be either name or tracking code)

TrackingLevel5 (value can be either name or tracking code)

TrackingLevel6 (value can be either name or tracking code)

TrackingLevel7 (value can be either name or tracking code)

TrackingLevel8 (value can be either name or tracking code)

TrackingLevel.'Name of Tracking Level' (name max 50 chars)

PayRate (numeric, max 4 decimal places)

HireDate (min year 1900)

ReleaseDate (min year 1900)

Street (max 128 chars)

City (max 35 chars)

State (max 20 chars)

PostalCode (max 15 chars)

Country (max 20 chars)

HomePhone (max 50 chars)

MobilePhone (max 50 chars)

EmergencyContactName (max 50 chars)
EmergencyContactPhone (max 50 chars)
EMail (max 255 chars. must pass RFC5322 formatting)
WebConnectUsername (max 255 chars)
WebConnectPassword (max 255 chars)
WebConnectPasswordChangeRequired (1=Yes,0=No)
DeskPunchPassword (max 255 chars)
DeskPunchPasswordChangeRequired
SalaryRate (numeric max 4 decimal places)
SalaryHours (numeric hours. fractional allowed)
SalaryStart (choose from previous,current,next)
SalaryRuleName (max 50 chars)
PrimarySupervisorUserName (supervisor's username of assigned notification recipient)
SecondarySupervisorUserName (supervisor's username of assigned notification recipient)
ScheduleName
ScheduleEffectiveDate
AccrualBalance.'Name of PTO' (numeric up to 4 decimal places)
AccrualBalanceDate.'Name of PTO'
AccruedAmount.'Name of PTO' (numeric up to 4 decimal places)
IdentityPin[.ConfigName]
IdentityPrivilege[.ConfigName] (0=Employee,2=Enroller,14=Administrator; accepts either number or word)
IdentityPassword[.ConfigName]
IdentityCardNumber[.ConfigName]
IdentityFingerprint0[.ConfigName] (binary data)
IdentityFingerprint1[.ConfigName] (binary data)
IdentityFingerprint2[.ConfigName] (binary data)
IdentityFingerprint3[.ConfigName] (binary data)
IdentityFingerprint4[.ConfigName] (binary data)
IdentityFingerprint5[.ConfigName] (binary data)
IdentityFingerprint6[.ConfigName] (binary data)
IdentityFingerprint7[.ConfigName] (binary data)
IdentityFingerprint8[.ConfigName] (binary data)
IdentityFingerprint9[.ConfigName] (binary data)
Property.'Name'

