Paychex Smart Time
User Guide

Paychex Smart Time User Guide

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Introduction

Welcome

Welcome to Paychex® Smart Time software!

Use this guide to learn how to use your Paychex Smart Time to perform essential tasks that make tracking employee time and your payroll processes more efficient.

The Paychex Smart Time system offers breakthrough web-enabled technology that brings the simplicity of embedded software to your time and attendance system, all without requiring Internet access. You are able to track and manage your employees' time and attendance, add employees, edit timecards, run and export reports, and much more directly from your web browser.

Your Paychex Smart Time clock can be connected directly to your computer by USB, serial port, or to your network by Ethernet. For instructions on connecting your employee time clock, refer to the *Paychex Smart Time Quick Start Guide* that came in your employee time clock package.

System Requirements

- Any machine that uses a web browser (Mac, PC, iPhone, etc.)
- Ethernet and Internet connection are required for remote Internet access
- One available Ethernet, USB, or serial port
- Using the USB port connection requires Windows Operating System (XP and above)

Note: If you are using your Paychex Smart Time clock with a Macintosh computer, you must connect your time clock to your network using an Ethernet connection.

Connection/Setup

Refer to the *Paychex Smart Time Quick Start Guide* for instructions on setting up your employee time clock's connection and logging into your time clock for the first time.

You can also find a copy of the *Paychex Smart Time Quick Start Guide* on the USB Drivers and Documentation CD supplied with the time clock or within the time clock application from the Help menu.

Support and Troubleshooting

For your convenience, troubleshooting tips and how tos are in Section 7, Troubleshooting and Frequently Asked Questions. In addition, our technical support team is available for your assistance and can be contacted by calling our Support Center at 1-877-234-1851.

Getting Familiar with Paychex Smart Time

The Paychex Smart Time clock interface is designed to allow you to quickly and easily complete your tasks and run your reports. In this chapter you learn how to navigate through your Paychex Smart Time application.

Application navigation is done through five distinct menus: Home, Lists, Reports, Files, and Settings. Moving your mouse cursor over each icon displays the individual drop-down menu items.
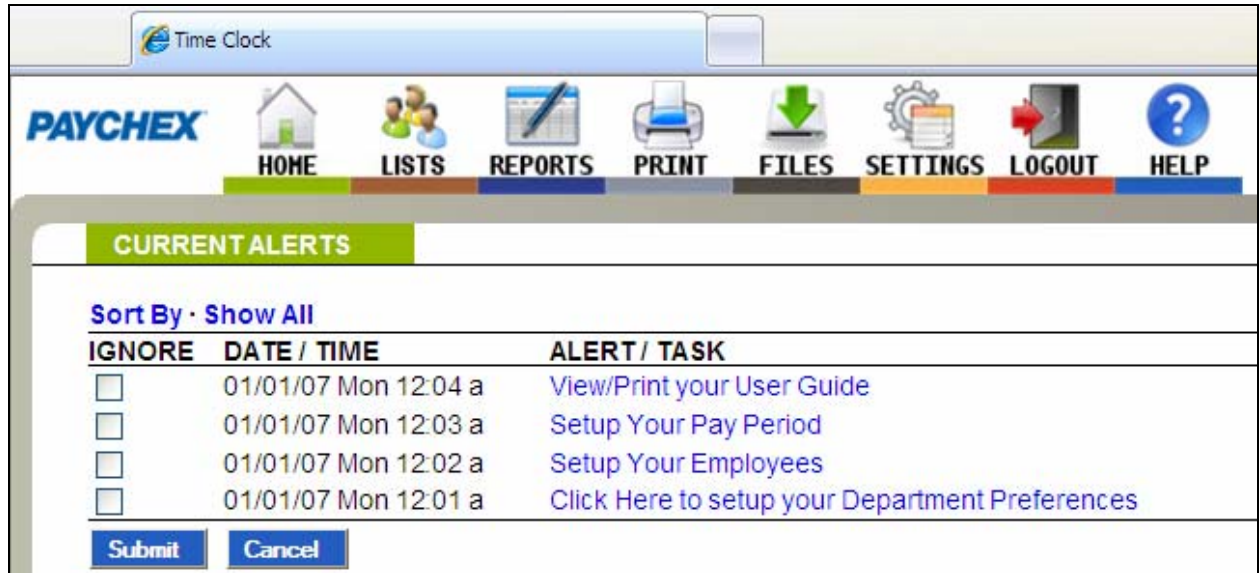
Home Page

When you first log into your time clock application, the Home page displays automatically. The Home page provides a quick glance at the activity on your time clock, including notifications of custom alerts. The Home page also contains helpful links to configure your software.

Current Alerts

The Home page displays important system alerts or alerts you set up in the program, with the time and date they occur.

For instructions on customizing your alert settings, refer to Setting Your Alert Preferences in Section 2, Setting Your Time Clock Preferences.

When you no longer want to be notified of a particular task or alert, check the checkbox next to that item in the Ignore column, then click **Submit**. If you would like to see past alerts set to Ignore, click **Show All**.

To view the details of the alert, click the alert link in the **ALERT/TASK** list.

Lists Menu

Use the Lists menu for adding, modifying, and deleting employees, departments, or system users. Refer to Employee Maintenance in Section 3, Setting Up Your Employees, and Department Maintenance in Section 6, Additional Functionality, for additional information.

Reports Menu

The Paychex Smart Time application has three basic report types that make it quick and easy to get the information you need to complete your work. Use the Reports menu to access Timecard, Attendance, and Department reports. The **Create Report** option provides more flexibility when running reports, and allows you to select a time range and department for one or more employees. Refer to Section 4, Generating Reports, for additional information on generating and customizing reports.

Files Menu

Use the Files menu to back up data, restore data back-ups, and update your employee time clock. Refer to Section 5, Maintaining Your Time Clock, for additional information on time clock maintenance.

Settings Menu

Use the Settings menu to customize your payroll, overtime, punch, device, and alert preferences. Before running any reports, set your preferences as described in Section 2, Setting Your Time Clock Preferences.

Using Your Time Clock Terminal

It is important to understand the features and functions available on your time clock terminal. Take the time to familiarize yourself with these features. This section contains a brief overview of the features available.

Time Clock Key Functions

- **In/Out** - Used by the employee to punch in or out.
- **Break/Department Transfer** - Used by the employee to transfer into a non-home department and allows employees to punch for breaks.
- **Info** - Displays daily and weekly hourly totals for the employee.
- **Supervisor Mode** - Allows supervisor to access advanced employee time clock terminal options.
- **Up/Down** - Used to scroll through menu options.
- **Enter** - Selects and saves menu options.
- **Clear** - Returns user to the previous menu option.

Employee Functions at the Clock

Employees use the time clock to enter their work information. This section describes how employees will use the time clock for daily activities.

Punching In and Out

The employee procedure to punch in and out at the time clock may vary depending on the entry method selected in Section 3, Setting Up Your Employees, for additional information.

The punch entry methods procedures are described below.

Validated Entry Method

The Validated Entry Method is the most common and recommended method for punching in/out with a time clock.

1. Enter your assigned PIN/badge number on the time clock terminal. Your name displays on the time clock. Under the display name, the In and Out options display. One of these options will be flashing.

2. Press the corresponding **In** or **Out** key on the time clock. Once the punch is accepted, a message displays stating they punched in or out.

3. After an employee punches out, the total hours worked by the employee for the shift displays on the time clock display. Additional hour's information is available to view by pressing the **Up** or **Down** key to view total hours for the day and the week.

Note: This option is activated in the Device Preferences tab, as discussed in Section 2, Setting Your Time Clock Preferences.

Non-Validated Entry Method

The Non-validated Entry Method is most often used with multiple time clocks. This allows the employee to punch in on one clock and punch out on a different clock.

1. Enter your assigned PIN/badge number on the time clock terminal. Your name displays on the time clock. Under the display name, the IN and OUT options display.

2. Press the corresponding **In** or **Out** key on the time clock. Once the punch is accepted, a message displays stating they punched in or out.

3. After an employee punches out, the total hours worked by the employee for the shift displays on the time clock display. Additional hour information is available to view by pressing the **Up** or **Down** key to view total hours for the day and the week.

Automatic Entry Method

This method is also known as "Swipe and Go", by entering your assigned PIN/badge number on the time clock terminal.

The time clock displays your name and *Entry Recorded*. You are not allowed to make any other selections at the employee time clock terminal. This provides a simple and quick method for punching in and out at the employee time clock.

The employee time clock automatically determines if the punch is an in or out punch.

Note: You cannot use the "Show Hours" at the employee time clock terminal or make any lunch override or hours adjustments to these types of punches. Refer to Adding a Punch in Section 4, Generating Reports, for additional information.

Proximity Badge Entry

Proximity badges allow employees to punch in/out by waving the badge in front of the time clock keypad. There are many benefits to using proximity badges; minimizing buddy punching, quicker punching in and out, and no PIN to memorize.

Proximity badges are assigned at the employee time clock terminal. Follow the instructions below to assign a proximity badge to an employee.

1. Enter into Supervisor Mode at your employee time clock terminal.

   a. Press on the time clock terminal.

   b. Enter your security code. The default security code is **00 00 00**.

2. Scroll through the options using the **Down** key until you find **Assign Badges**, then press **Enter**.

3. The time clock displays **Enter ID Number**. Use the keypad to enter the assigned PIN/badge number of the employee you wish to assign the badge, then press **Enter**.

4. Wave the badge in front of the time clock keypad (over the 5 key is the optimal location to wave the badge). The clock displays "Assigned" when the badge is assigned to the employee.

The employee can now use the badge to punch in and out. Repeat the steps above for each employee.

Web Punch Time Clock Entry

The Web Punch Time Clock allows you to capture your employees time punches anytime, anywhere using a web browser based time clock that runs on LAN, WAN, or Internet. Refer to Section 6, Additional Functionality, for additional information.

Taking Paid Breaks

Paychex Smart Time comes standard with one department that can be used to track paid breaks. Tracking paid breaks allows you to better manage the time your employees are taking during their paid break periods.

To track time that an employee spends on their paid break, the employee must be assigned to the break department and must transfer into the break department.

To transfer into the break department, follow the instructions below. The employee must already be punched in to the employee time clock.

1. Enter your assigned PIN/badge number on the time clock terminal, or wave the proximity badge in front of the number pad.

2. Instead of pressing **In** or **Out**, press the **Break/Department Transfer** key on the time clock.

3. A message stating "Going To... Break" displays on the time clock. To clock into break, press **Enter**. This punches the employee out of the default work department and into the break department.

4. To transfer **out** of the break department and back to work, enter your PIN/badge number at the time clock terminal, or wave the proximity badge in front of the number pad.

5. Instead of pressing **In** or **Out**, press the **Break/Department Transfer** key on the time clock.

6. A message stating "Going To... Break" displays on the time clock. Press the **Up** or **Down** arrow key to select the appropriate department. To punch out of break and into work, press **Enter**. This punches the employee out of the break department and into the work department.

Department Change (Sign In and Transfer)

Your time clock can track time spent by an employee in a certain department. You can assign employees to multiple departments. To sign into a department, follow the instructions below.

1. Enter the assigned PIN/badge number at the time clock or wave the proximity badge in front of the number pad, then press **In**.

2. Use the **Up** or **Down** key to select the applicable department.

3. Press **Enter**.

By pressing the **Break/Department Transfer** key, the employee has the ability to quickly transfer from one department to another.

1. If an employee needs to punch out of one department and into another department, enter the assigned PIN/badge number at the time clock or wave the proximity badge in front of the number pad, then press **Break/Department Transfer**.

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

Note: Employees assigned in the Automatic Entry Method in the program cannot select departments at the employee time clock terminal.

2   Setting Your Time Clock Preferences

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Setting Your Time Clock Preferences

Before accurate reports can be generated and employee punch details are calculated correctly, you must set your time clock rules and preferences.

Setting Your Pay Preferences

You can access your Pay Preferences in one of two ways:

*   Click **Setup Your Pay Period** in the Alert/Task list.

*   Select **Preferences** from the Settings Menu from the Navigation Menu.

Follow the instructions below to set your Pay Preferences. Begin with completing the Company Information section.

1. Select the applicable option from the **Pay Period Type** drop-down menu:

    *   **Weekly** - Employees are paid once per week.
    *   **Bi-weekly** - Employees are paid every two weeks.
    *   **Semi-Monthly** - Employees are paid twice per month.
    *   **Monthly** - Employees are paid once per month.

Note: If you select the Semi-Monthly pay period, two additional date fields display that must be completed.

2. Type the first day of the month that your pay period begins in the **Start Semi-Monthly on** field.

3. Type the second day of the month that your pay period begins in the **and on** field.

    Note: Due to leap year rules, a semi-monthly pay period cannot be set to start after the 28 of the month.

4. Click in the **Last Pay Start** field to open the calendar and select the date that your previous pay period started.

    Tip: Use **<<** and **>>** to select the year. Use **<** and **>** to select the month.

5. Click in the **This Pay Start** field to open the calendar and select the date that your current pay period started.

6. Click in the **Next Pay Start** field to open the calendar and select the date that your next pay period starts.

7. Type the time of day that your workday begins in the **Day Start** field. You only need to modify this setting if your company has a 24-hour work schedule and needs to accommodate overnight shifts. If you do not have overnight shifts, it is recommended that this setting remain at 12:00 a.m.

8. Select the day of the week that your work week begins from the **Week Start** drop-down menu. The company's weekly overtime calculations are based on the week start day set for the company.

Setting Your Overtime Preferences

Your Overtime Preference settings are on the **Pay** tab under **Payroll Preferences**. Paychex Smart Time comes standard with one level of daily, weekly, and consecutive day overtime. Overtime (OT1) is calculated at time-and-a-half (1.5), and double overtime (OT2) is calculated at two times the rate of pay (2.0).

Follow the instructions below to set your Overtime Preferences.

OVERTIME PREFERENCES		
Day OT1 After	8.00	Hours
Day OT2 After	99.00	Hours
Week OT1 After	40.00	Hours
Week OT2 After	99.00	Hours
Consecutive Day OT	No	
Consecutive Day OT After	99	Days
Consecutive Day OT1 After	99.00	Hours
Consecutive Day OT2 After	99.00	Hours

1. To set daily overtime rules, type the number of hours an employee must work in one day before they receive overtime in the **Day OT1 After** and the **Day OT2** fields as required. If your company does **not** pay daily overtime, type **99**.

2. To set weekly overtime rules, type the number of hours an employee must work in one week before they receive overtime in the **Week OT1 After** and the **Week OT2 After** fields as required. If your company does **not** pay weekly overtime, type **99**.

3. To set consecutive day overtime rules, change the **Consecutive Day OT** drop-down menu to **Yes**. This option will pay OT1 and/or OT2 as selected to employees on the seventh consecutive day of work, regardless of hours worked during the work week. This rule is most commonly used by unions and in California. If your company does **not** pay consecutive overtime, change the **Consecutive Day OT** drop-down menu to **No**.

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

Setting Your Punch Preferences

From the **Pay Preferences** tab, select the **Punch** tab. The Punch Preferences screen displays.

Pay	Punch	Device	Alerts	User

PUNCH PREFERENCES

Rounding Type	None
	None
	15 minute
	15 minute slant
	10th hour

Automatic Punches become IN at	15.00	Hours
Flag edits on reports	☑	
Reject Like Punches within	2	Minutes

Submit   Cancel

Follow the instructions below to set your Punch Preferences.

1. Select the applicable rounding type from the **Rounding Type** drop-down menu.

Note: The rounding rule selected affects all punches system wide. The original punch time remains unchanged on the employee timecard. The punch hours round according to the rounding rules set.

The available rounding types are:

- **None**: (No Rounding) Accumulates 100% of all time registered on the clock. Punches calculate to 1/100th of an hour.

- **15 Minute**: Rounds and calculates punches from the nearest quarter hour (15 minutes). The split occurs in the middle of each quarter hour. This rounding option is also referred to as 7/8 rounding.

  | To Illustrate: | 7 minutes 59 seconds *rounds back* |
  | | 8 minutes 00 seconds *rounds forward* |

  | Example: | A punch at 7:52 a.m. calculates as 7:45 a.m. |
  | | A punch at 7:53 a.m. calculates as 8:00 a.m. |

- **15 Minute Slant**: Quarter hour rounding similar to above, except the break point occurs on the fifth minute or tenth minute, depending on whether it is an in punch or an out punch (10/5 split on in punch; 5/10 split on out punch).

To Illustrate:	An in punch of 4 minutes 59 seconds *rounds back*
	An in punch of 5 minutes 00 seconds *rounds forward*
	An out punch of 9 minutes 59 seconds *rounds back*
	An out punch of 10 minutes 00 seconds *rounds forward*

  | Example: | An in punch at 7:49 a.m. calculates as 7:45 a.m. |
  | | An in punch at 7:50 a.m. calculates as 8:00 a.m. |

- **10th Hour**: Rounds and calculates punches to the nearest tenth of the hour (6 minutes). The split occurs after each six minutes in the hour.

10th Hour Chart

Minutes	Minutes
58-03 = 00	28-33 = 30
04-09 = 06	34-39 = 36
10-15 = 12	40-45 = 42
16-21 = 18	46-51 = 48
22-27 = 24	52-57 = 54

  | To Illustrate: | An in punch from :58 minutes before the hour to :03 after the hour rounds to the top of the hour (:00). |
  | | An in punch from :04 minutes after the hour to :09 minutes after the hour rounds to :06. |

  | Example: | An in punch at 7:40 a.m. calculates as 7:42 a.m. |
  | | An out punch at 4:05 p.m. calculates as 4:06 p.m. |

2. The **Automatic Punches become IN at** field automatically makes the next punch an in punch after a determined number of hours. This option is convenient if an employee forgets to punch out.

   This option is **only** used when an employee entry method is set to Automatic. Refer to Section 3, Setting Up Your Employees, for additional information.

   If you plan on using the Automatic Entry Method, enter the number of hours that must pass before the next punch automatically becomes an in punch. Unless your employees regularly work more than 15 hours a day, the default setting is recommended.

3. Check the **Flag edits on reports** checkbox to flag manually edited punches on reports. If checked, all edited punches are marked with **E**.

4. Type the number of minutes in the **Reject Like Punches within** field if an employee accidentally tries to enter the same type of punch at the clock. Within the minutes specified, the second punch is ignored.

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

Setting Your Device Preferences

Select the **Device** tab to access the **Device Preferences** screen.

Important information, such as your Database Version, Software Version, and time clock Serial Number display at the top of the screen.

Follow the instructions below to set your Device Preferences.

1. Select if you want to display minutes on your reports in decimal or hh:mm (minutes) format from the **Calculated Time Format** drop-down menu.

2. Select the length of the custom employee PIN (ID number) from the **PIN Number Length** drop-down menu. Customize employee PINs (ID numbers) in the **Edit an Employee** screen. Refer to Section 3, Setting up Your Employees, for additional information.

3. Check the **Hide Employee PIN** checkbox to hide employee PINs (ID numbers) at the time clock terminal, preventing coworkers from viewing another employee's PIN.

4. Use **System Prompt 1, 2**, and **3** fields to set up to three custom prompts at the employee time clock terminal. The default system prompt on the time clock display is *Enter ID Number.*

5. Type a unique 6-digit security code in the **Supervisor Code** field to secure the employee time clock.

    Important: You need this code to access Supervisor Mode on the employee time clock. The default supervisor code is **00 00 00**.

6. Check the **Lock Keypad** checkbox to lock the keypad and prevent keypad entry of employee ID numbers (PIN) at the employee time clock. Use this option if you purchased proximity badges for your employee time clock and you do not want employees using the keypad.

7. Check the **Use Daylight Savings** checkbox if you want the clock to automatically adjust time for daylight savings.

8. Select the default time frame to view when you open the Attendance Report screen from the **Default Attendance Report To** drop-down menu.

9. Select the default time frame to view when you open the Timecards Report screen from the **Default Timecard Report To** drop-down menu.

10. Type the number of minutes to set how often alerts on the Home page refresh in the **Refresh Home Page Every** field. We recommend setting this to10 to prevent the system from running slow. If your system runs slow, type a larger number for the refresh time.

11. Check the **Use SSL Server** checkbox to encrypt SSL data, ensuring all data passed between the time clock and web browser remains private.

    Note: Do not check this option if you are using a direct USB connection to the clock.

12. Check the **Use Popup Windows for Edits** checkbox to have a separate pop-up window display when editing a punch in a report screen. This allows you to view the original report screen in the background while you edit. We recommend keeping this option checked.

13. Check the **Use Batch Edits** checkbox to complete multiple punch edits on your report before updating the report. To batch update the report screen with your edits, click **Refresh** in the upper right of the report screen.

    Tip: Check both the **Use Popup Windows for Edits** and the **Use Batch Edits** options to speed up report editing.

14. Check the **Show total hours at the clock** checkbox to have the time clock automatically report the employee's total daily hours after the employee punches out.

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

SMTP Preferences: An SMTP server is a computer that receives outgoing mail messages from users and routes them to their intended recipients. For more detail on setting up your SMTP server, refer to Section 6, Additional Functionality.

Setting Your Alert Preferences

Select the **Alerts** tab in the **Preferences** screen to setup the alert notices displayed on the Home page. The Home page updates based on your time setting for the **Check Alerts Every** field described below.

Tip: To disable any alert, set the alert value to **99**.

PREFERENCES

| Pay | Punch | Device | Alerts | Custom Fields |

ALERT PREFERENCES

Alert Low Hours at	0.00	Hours per punch
Alert High Hours at	14.00	Hours per punch
Alert Day Overtime OT at	2.00	Hours remaining
Alert Week Overtime OT at	8.00	Hours remaining
Check Alerts Every	15	Minutes
Email Alerts Every	15	Minutes
Email Daily Alerts at	12:00a ▲▼	

Submit Cancel

1. Type the least amount of hours an employee can work per punch in the **Alert Low Hours at** field. If an employee works a shift less than the hours specified, an alert generates.

2. Type the maximum amount of hours an employee can work per punch in the **Alert High Hours at** field. If an employee works a shift more than the hours specified, an alert generates.

3. Type the number of hours overtime goes into effect for an employee in the **Alert Day Overtime OT at** field. This option triggers an alert before employees reach daily overtime by using the daily overtime value that you set under Overtime Preferences.

   Example: If you have Day OT1 set to 8 hours and Alert Day Overtime OT set to 2 hours, an alert posts to the Home page when the employee reaches 6 hours worked for the day.

4. Type the number of hours overtime goes into effect for an employee in the **Alert Week Overtime OT at** field. This option triggers an alert before employees reach weekly overtime by using the weekly overtime value that you set under Overtime Preferences.

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

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

6. Type the number of minutes you want to receive e-mail alerts in the **Email Alerts Every** field.

7. Set the time of day you want e-mails to be sent in the **Email Daily Alerts at** field.

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

For additional Alert configuration, select **Settings | Alert Setup**.

Creating Custom Fields

Paychex Smart Time offers 10 additional fields for tracking static information in Custom Fields. These fields display in the system, employee, or department pages.

System: These fields display on the bottom of the Custom Fields page.

Employee: These fields display on the bottom of each employee's Edit Employee page.

Department: These fields display on the Departments page.

Follow the instructions below to set your Custom Fields.

1. Type the title for the custom information in the **Title for Field X** field (X being the field number).

2. Select where this custom field should display from the **Assign Field X to** drop-down menu (X being the field number).

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

4. Go to the new custom field on the page specified and complete the applicable field as needed.

Alert Setup

1. Using the Alert Preferences set earlier, select **Settings | Alerts Setup**, and follow the instructions below to set up Home page alerts.

   - **Enabling/Disabling Alerts**: To disable an alert, deselect the checkbox in the far left column. This prevents the alert from being posted on the Home page.

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

   - **Lifetime**: Use the drop-down menus under the **Lifetime** column to select the amount of time the alert remains on the Home page. After that time, the alert is automatically removed.

   - **E-mail**: Select how often you would like an e-mail alert sent from this drop-down menu.

   - **Repeat**: Select how often you would like an e-mail alert to be resent from this drop-down menu.

   - **Recipient**: Type the alert recipient's e-mail address. For multiple addresses, add a space in between each e-mail address.

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

3   Setting Up Your Employees

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Setting Up Your Employees

In order for your employees to use the Paychex Smart Time clock, you must enter them into the application. This section discusses how to enter employees.

Employee List

A list of your employees and their ID numbers (PINs) are in the Lists Menu under Employees.

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

EMPLOYEE LIST				
Details · Show All				
			Time Remaining Before Overtime	
Employee	Web Punch	Daily	Weekly	Consecutive Days
067-Empl 067			40.00	
101-Empl 101			40.00	
145-Empl 145			40.00	
189-Empl 189			40.00	
223-Empl 223			40.00	

View Employee Details: Click **Details** at the top of the page to view or print a list of details for all employees.

Viewing Inactive Employees: If an employee is not marked as active in the **Edit an Employee** screen, they do not display on the Employee List page. Click **Show All** at the top of the report to view all employees, active and inactive.

Time Remaining Before Overtime:

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

- The **Weekly** column displays the number of hours left in the week before the employee starts earning weekly overtime.

- The **Consecutive Days** column displays the number of days left in the work week before the employee starts earning consecutive day overtime.

Editing Your Employees

To customize an employee, select an employee or one of the available employee slots. Follow the instructions below to set up an employee.

Employee Information:

Paychex Employee ID: Type the Paychex assigned employee ID.

First Name: Type the employee's first name.

Middle Initial: Type the first initial of the employee's middle name.

Last Name: Type the employee's last name.

Display Name: Type the name that displays for the employee at the time clock and on reports, up to 16 characters.

Address: Type the employee's address (optional).

Note: This field is used to track a custom note for the employee.

Employee Settings:

Display ID: This field is used for companies that want to sort employees by a number other than the employee ID (PIN) number. We recommend keeping the Display ID set to the PIN.

PIN/Badges: Type the custom ID number (PIN) you want to assign to the employee. The default PIN length is set to three digits; you can customize the PIN length up to nine digits under **Device Preferences**.

Departments: Select departments to assign to the employee. The employee is able to transfer into these at the clock. If you are tracking paid breaks, set the first department to **Break**.

Active: All employees default to an active status. Deselect this checkbox to make the employee inactive and to hide their name from reports. Inactive employees display at the bottom of the employee list when after clicking **Show All**.

Entry Method: This option determines the procedure for punching in and out by the employee at the employee time clock. Select the desired method from the drop-down menu.

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

Validated: The employee is required to either punch in or out at the employee time clock. The correct option blinks on the time clock display. The employee is required to press the correct key at that time.

Example: If an employee forgets to punch out the day before, they will be required to punch out first before they can punch in for their current shift. The punch information can be edited in the software so the proper punch out time and date is recorded on the reports.

Non Validated: In and out displays under the employee's name at the employee time clock. The employee is required to press the correct key at that time, either **In** or **Out**. Either entry is accepted by the employee time clock.

Automatic: This is also known as "Swipe and Go". After the employee enters their PIN/badge number, the display on the employee time clock displays the employee name and the message, "Entry Recorded". The employee is not allowed to make any other selections at the employee time clock. This provides a simple and quick method for the employee at the employee time clock.

The employee time clock records every punch as an in punch. Every other punch is considered an out punch by the program.

You cannot make lunch overrides or hours adjustments to these types of punches. Refer to the Add a New Punch section for additional information.

Lunch Enabled: Check this checkbox if you want the time clock to automatically deduct the employee lunch. Use this option when employees do not manually clock in and out for lunch.

Lunch At: Type the number of hours the employee is required to work before the lunch period automatically deducts from the employee's shift for the day.

Lunch Length: Type the amount of time in minutes to deduct for lunch (typically 30 to 60 minutes).

Web Punch Time Clock Settings: Set these settings when Web Punching is allowed. For additional information on this option, refer to Section 6, Additional Functionality.

Delete All Punches for this Employee: Use this option to delete all punches for an employee. This is typically used when an employee leaves the company and you want to re-use the employee ID (PIN).

Note: Before purging employee punches, we recommend that you save a backup of your data. This allows you to view that employee's data at a later date. Refer to Section 5, Maintaining Your Time Clock for additional information.

1. To delete the employee's punches, click **Delete all punches for this employee**. A confirmation message displays.

2. Click **OK**.

Repeat the applicable procedures with all of your employees to complete employee setup.

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4   Generating Reports

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Generating Reports

Reports in your application are designed to be intuitive to read and edit; this creates ease and simplicity when generating your reports on payroll day.

Paychex Smart Time uses "Click-and-Edit" reports. This means that you can edit the employee and punch data directly from the report. Most of the text that displays on reports are web links that open additional screens or editing options.

Attendance and Timecard Reports

Punch information on your reports update based on the setting entered in the **Update Employee Hours Every** field in the **Alert Preferences** screen, as discussed in Section 2, Setting Your Time Clock Preferences. Click **Refresh** at the top of the Report screen to update punch information immediately.

The Attendance report displays all employee punch data sorted by date, whereas the Timecard report displays the same punch data sorted by employee. Each report displays the actual punch times and accumulated hours.

EMPLOYEE	TIME IN	DEPT	TIME OUT
07/22/10			
67-ECurley	Thu 06:15a E	Shipping	Add Punch
Totals:			

Adding a Punch

From the Attendance or Timecard report screen, click **Add Punch** at the top of the report to add a new punch. You may also use this functionality for an in or out punch on a certain day that does not have a matching punch.

To complete the punch pair, click **Add Punch** on the employee's timecard to display the **Add New Punch** screen.

Perform the following when adding a punch:

1. Confirm the correct employee. When selecting **Add Punch** from an employee's timecard, the correct employee's ID and name display automatically.

ADD NEW PUNCH

Employee	067-ECurley
Flags	
Type	Out
Date	07/22/10
Time	04:30p ▲▼
Lunch	0 Minutes
Adjust	0.00 Hours
Note	

Submit   Cancel

2. Select the punch type that you want to add from the **Type** drop-down menu.

> **Notes:** • Automatic allows the time clock to select the appropriate punch type.
>
> • When adding or editing an Automatic punch, change the punch type from Automatic to Out if you would like to add a lunch or hours adjustment, as you cannot complete a lunch override or adjust hours to an automatic punch.

3. Click in the **Date** field to use the calendar to select the punch date.

4. Type the time for the punch in the **Time** field. The application assumes a.m., unless otherwise specified.

5. Select the department where the employee is punching into for an in punch from the **Department** drop-down menu.

6. For an out punch, you have the option to enter an additional lunch deduction. Type the number of minutes for the employee lunch deductions in the **Lunch** field.

7. For an out punch, you have the option to enter an additional time adjustment. Type positive or negative values to adjust time for the shift in the **Adjust** field.

> **Example:** An employee may be credited an hour of bonus time for additional workload that day. If taking a 60 minute lunch, type **60** in the **Lunch** field, type **1.00** in the **Adjust** field, then click **Submit**. The following posts to the report.

EMPLOYEE	TIME IN	DEPT	TIME OUT	LCH	ADJ	HRS	REG
07/22/10							
067-ECurley	Thu 06:15a E	Shipping	+Thu 06:15p E	60min	1.00	12.00	12.00
			NOTE: Good work today!				

8. Type any applicable notes in the **Note** field. You have an additional option to print notes that coincide with each particular punch. This feature is often used to track an event that happened with that punch. A plus sign (+) accompanies that punch.

9. Click **Submit** to save your changes.

Editing a Punch

Modifying or editing a punch on an Attendance or Timecard report is simple.

1. Click the in or out time you want to edit. Each punch entry in the Time In and Time Out columns of the report are a web link that when clicked displays the Edit a Punch screen.

2. Make the desired punch edit, then click **Submit**.

    Note: All edited and manually entered punches may be flagged on the report with an **E** next to the punch. Refer to Setting Your Punch Preferences discussed in Section 2, for instructions on enabling or disabling this option.

Using Batch Edits

Batch Edits is an option if you chose the feature in Setting Your Device Preferences discussed in Section 2.

We recommend the use of Batch Edits with pop-up windows to make punch editing easier.

To use Batch Edits with pop-up windows, follow the instructions below:

1. Before editing punches, print the Timecard or Attendance report for the pay period. Review which punches you need to edit.

2. In the Report screen, click the applicable punch you want to edit or add.

3. The Edit a Punch screen displays in a separate pop-up window.

4. Make the desired punch edit, then click **Submit**.

    Note: You will not immediately see the changes in the Report screen. After editing all of the punches, click **Refresh** in the upper right of the report screen. The edited data displays on the report.

Viewing Additional Reporting Details

Customizing your reports and viewing additional details on a Timecard or Attendance report is uncomplicated.

All of the blue links in the Timecard and Attendance report are Web links that allow you to customize or view details of your data. The Timecard report has additional detail options. Refer to the next section for additional information.

From: 07/19/10 Thru: 07/31/10 Add Punch							Daily · Notes · Exceptions · Refresh		
EMPLOYEE	TIME IN	DEPT	TIME OUT	LCH	ADJ	HRS	REG	OT1	OT2
07/22/10									
67-ECurlev									

- **Edit Employee Info**: Click the employee's name in the Employee column of the report to edit an employee's details.

- **Select a Report Time Period**: To change the report timeframe, click the date link at the top of the Report screen.

    a. Click the appropriate predefined timeframe link or use the **From** and **Thru** date fields enter a custom timeframe to run the report.

    b. Click **Submit** after entering custom dates.

- **Daily**: This option displays the total hours worked for each day in a report. This is convenient if the employee clocks in and out multiple times during the day.

    You can also click the date in the Employee column of the report to view daily totals for a specific day. Click the date again to hide the information.

- **Notes**: This displays any notes added to an employee's timecard, indicated by the plus sign. Click the link again to hide this information.

- **Exceptions**: Click this link to view punches that may require the attention of the payroll manager. Click the link again to hide this information.

    Exception types and settings are found under Setting Your Alert Preferences in Section 2, Setting Your Time Clock Preferences. Descriptions of the exception flags are listed below.

H	Punch pair reached the Alert High Hours.
L	Punch pair is below the Alert Low Hours.
M	Punch pair reached the Alert Maximum Time.
O	Punch pair is up-to-date with a specific lunch deduction in the Edit a Punch screen.

- **Refresh**: Click this link to update the report. All recent punches or changes display.

Using the Attendance Report

To view the Attendance report, hover your cursor over **Reports**, then click **Attendance**. The Attendance report is designed to give you a quick at-a-glance view of your employee's daily attendance. Most companies use this report to view who clocked in or out for the day.

Click the date link to select the time period for the report. From the resulting page, you can perform edits.

Using the Timecard Report

This report includes reporting options not available on the Attendance report. The Timecard report allows you to run a report for one specific employee, or all employees.

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

2. Select the employee from the **Employee** drop-down menu.

3. Click **Submit** to save your selection.

CSV Export: Exports a report in comma-delimited (CSV) format. This report is used for importing employee punch data into payroll programs that use CSV files.

1. Click **Export** at the top of the report to save the report in comma-delimited (CSV) format.

2. Click **Save** in the File Download screen, type a name for the file, and select a location to save the file. You can open the CSV file in a text editor or Microsoft Excel.

Signature: Click **Signature** at the top of the Timecard report to display an employee signature line. When you print timecards, this line displays on the timecard. This option is often used by companies that keep a printed record of employee time and to show employee timecard approval.

Creating Custom Reports

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

From the Navigation menu, hover your cursor over Reports, and click **Create Report** from the drop-down menu.

To create a Report, perform the following.

1. Select the type of report to run from the **Report Type** drop-down menu.

2. Select the time frame for the report from the **Time Frame** drop-down menu.

3. Select the applicable employee(s) to view on the report from the Select Employees list, or click **Select All** to run a report for all employees.

    Note: Press **Ctrl** key to select more than one employee.

4. After defining the parameters of your report, click **Submit**.

Using the Payroll Report

At the end of the pay period, compile employee data and transmit to Paychex for processing. The Payroll report options assist in getting the timecard data ready to print, e-mail, or direct export to Paychex.

1. Select the timeframe of the data from the **Pay Period** drop-down menu.

2. Click the appropriate radio button for exporting time card data.

- **PRINT PAYROLL TIMECARD REPORT:** This option takes you back to the Timecard report. Click **Print** to send the data to the printer or click **Export** to compile the data into a comma-delimited format.

- **EMAIL PAYROLL TIMECARD REPORT:** This option allows you to select your local Paychex branch office from the **Send to Branch** field. Enter any additional e-mail addresses in the **Email 1** and **Email 2** fields.

   Note: An SMTP server must be set up in order to send an e-mail. Once done, you can send a message with the report by entering it into the **Message** field.

- **EXPORT TO CORE ADVANCED ONLINE PAYROLL:** This option creates a text file with the employee's time card data. Save the data and then import it into the Core Advanced Online Payroll application.

3. Click **Submit**.

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

Printing Reports

To print reports, click the **Print** icon from the Navigation Menu. Some browsers and computers may print differently depending on the font size and margin settings. The report may print better using narrower margins. Check your browser's print preferences to adjust print margins.

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5   Maintaining Your Time Clock

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Maintaining Your Time Clock

The Paychex Smart Time application offers a simple way of backing up your data and performing updates to keep your system running optimal. This section shows you how to create backups of your time clock data, how to restore those backups for future reference, and how to perform system updates.

Creating a Backup of Your Time Clock Data

It is important to make a backup (copy) of your employee time clock data periodically. Use this backup to restore your data in case of any data loss. We recommend creating a backup of your time clock data each night and prior to performing any updates to your time clock software.
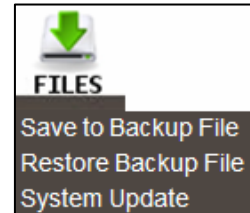
Follow the instructions below to create a backup of your time clock's data.

1. From the Navigation Menu, hover your cursor over **Files**, then select **Save to Backup File** from the drop-down menu.

2. Click **Submit** to create a backup in the Save to Backup File screen. A pop-up window displays.

3. Click **Save**.

   A file name is automatically assigned for you. The file name includes the current date for easy reference. For example, a typical file name may be paychex-2010-08-15.db.

   a. If you prefer a different file name, type the name in the **File name** field.

   b. Browse to the directory where you would like to save the file.

   c. Click **Save**.

   d. After the download is complete, click **Close**.

4. After creating the backup, you can delete punches before a definable start date. Doing so helps keep your database at a manageable size.

Removing Data from Your Application

It is recommended that you only keep the most recent data on your time clock. To keep your system running optimal, delete unneeded data off of the clock.

After you save a backup of your data, the Removing Old Data screen displays. Perform the following procedures to remove the old, unneeded data.

1. Select a date using the calendar in the **Delete Punches** field.

2. Click **Submit** to remove punches up to the date specified.

3. Click **Cancel** to go back to the time clock Home page.

   Note: When selecting a date, any data before that date will no longer be available as part of your active database. An active database retaining three to six months of data is generally adequate for most users.

Creating a Backup to a USB Flash Drive Directly from the Time Clock

Creating a backup of your data can be simplified by saving your data to a USB flash drive. A flash drive is a portable device that you can purchase at any computer store. Follow the directions below to create a backup of your time clock data using a USB flash drive.

1. Plug the USB flash drive into the bottom of the employee time clock terminal.

2. Enter into Supervisor Mode:

   a.   Press 🔓 on the time clock.

   b.   Enter your security code. The default security code is **00 00 00**.

3. Press **Up** or **Down** until the **DOWNLOAD BACKUP** option displays.

4. Press **ENTER**. The clock displays "Backing up data", then "Backup complete".

   Note: The backup file data saved on the USB flash drive is named backup.db. This file can be renamed and transferred to a folder on your main computer.

Restoring a Data Backup

On occasion, you may need to restore historical data to your time clock. Perform the following to restore a backup of your time clock data.

Important: Restoring a backup file overwrites the current data on the clock. Create a current backup of your data before attempting to restore and view historical data.

1. From the Navigation Menu, hover your cursor over **Files**, then click **Restore Backup File**.

2. Type your password in the **Current Password** field.

3. Click **Browse** and navigate to the location of your backup file.

4. Select the file in the Choose File window and click **Open**.

5. Click **Submit** in the Restore Backup File screen to restore the backup file.

6. A warning message displays stating that your current data will be overwritten at the employee time clock. Click **OK** to continue.

   Note: It may take several minutes to restore a backup data file, especially if you are using a USB or serial port connection. The employee time clock displays "Please Wait", then a "Performing Restore" message.

5. After the restore is complete, log back into the time clock to view the backup information.

Restoring a Backup Directly from a USB Flash Drive

Restoring a backup of your data is easy using your USB flash drive. Follow the directions below to restore a backup from a USB flash drive.

Important: Restoring a backup file overwrites the current data on the clock. Create a **current** backup of your data before attempting to restore and view historical data.

1. Copy the backup file data to the root of the memory stick.

2. Rename the file **backup.db** and ensure the name is all in lower case letters.

3. Connect the storage device to the bottom of the employee time clock.

4. Enter Supervisor Mode on the employee time clock.

   a. Press on the time clock.

   b. Enter your security code. The default security code is **00 00 00**.

5. Press **Up** or **Down** until RESTORE BACKUP displays and press **ENTER**.

   If the file is found, Restoring Data, then Performing Restore displays. The clock reboots.

6. After the clock reboots, log back into the employee time clock software to view your data.

Updating Your Time Clock

Occasionally, Paychex Smart Time releases new updates for your employee time clock. These updates are free and include new features and improvements.

Note: Before performing updates to your employee time clock, we recommend that you save a backup of your data. Refer to the Creating a Backup of your Time Clock Data Section for additional information.

Important: If you are using a Macintosh computer to manage your time clock software, you must update using the USB flash drive. Refer to Updating Your Time Clock Using a USB Flash Drive in this section for additional information.

Follow the instructions below to update your Paychex Smart Time clock.

1. Download the time clock update you receive from your Paychex support representative.

2. From the Navigation menu, hover your cursor over **Files** and click **System Update**.

3. In the System Update screen, type your time clock password in the **Current Password** field.

4. Click **Browse** to locate and select the **ETC_update.bin** file in the File Upload screen. This is located on your desktop.

5. Click **Open** in the File Upload screen.

6. Click **Submit** in the System Update screen.

7. A pop-up window displays for you to save a backup of your data. If you already created a backup of your data, disregard this message by clicking **OK**. Your time clock starts the update process, then automatically reboots. Wait for this process to complete. This process may take up to 15 minutes.

8. When rebooting is complete, click **Home** to log back into your time clock.

Updating Your Time Clock Using a USB Flash Drive

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

Important: If you are using a Macintosh computer to manage your time clock software, you must update using the USB flash drive.

1. Download the time clock update you receive from your Paychex Support Representative and save it to your flash drive.

2. Rename the file **update.bin** and save the file to the root of the flash drive.

3. Connect the storage device to the bottom of the employee time clock. Your time clock begins the update process and automatically reboots. Wait for this process to complete.

4. When the reboot is complete, log back into your time clock.

Resetting Your Time Clock Password

Perform the following procedures to reset the Software Interface and time clock Supervisor Mode passwords. Use this procedure if and there is a time clock administrator change or an existing administrator forgot their login and/or password for the time clock application.

Resetting the Time Clock Interface Password

1. Enter into Supervisor Mode:

   a. Press on the time clock terminal.

   b. Enter your security code. The default security code is **00 00 00**.

2. Scroll through the options using **Up** or **Down** until you find **Reset Password** and press **Enter**.

3. Press **In** to reset the password or **Out** to cancel. Once the password resets, you receive the message Password Set Successfully on the time clock display.

4. When logging in at the time clock Login page, enter the default login information and click **Submit**.

   - Default Username: admin

   - Default Password: admin

5. Change your password.

    a. Type the default administrator password or your current password.

    b. Type your new password.

    c. Confirm your new password.

Resetting the Supervisor Mode Security Code

The Supervisor Mode security code is set from the software interface. This code allows changes to be made at the time clock by the administrator. The default supervisor code is **00 00 00**. We recommend it is not changed, however; if you change it, the procedure is as follows:

DEVICE PREFERENCES
Supervisor Code   00 00 00
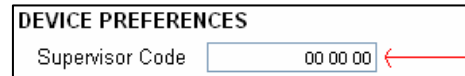
1. Select **Settings | Preferences** from the Navigation menu.

2. Click the **Device** tab.

3. Type the supervisor code in the **Supervisor Code** field. This is required to access Supervisor Mode on the employee time clock terminal.

4. Click **Submit** to save your settings.

Changing Your Software Interface Password

You can change the password by selecting **Change Password** from the Settings menu.

1. When prompted, enter the default login information and click **Submit**.

CHANGE PASSWORD
Current Password   ••••
New Password
Confirm New Password
Submit

    - Default Username: admin
    - Default Password: admin

2. Type the default administrator password, or your current password in the **Current Password** field.

3. Type your new password in the **New Password** field.

4. Type your new password again in the **Confirm New Password** field.

5. Click **Submit**.

Changing the Time on the Time Clock Terminal

The instructions below outline changing the time on your time clock terminal.

1. Enter into Supervisor Mode at your employee time clock terminal.

   a. Press 🔓 on the time clock terminal.

   b. Enter your security code. The default security code is **00 00 00**.

2. Scroll through the options using **Up** or **Down** until you find the option **Set Date/Time** and press **Enter**.

3. The Set Date option displays.

   a. The **Month** field flashes. Use **Up** or **Down** to select the current month, and press **Enter**.

   b. In the **Day** field, use **Up** or **Down** to select the current day of the month and press **Enter**.

   c. In the **Year** field, use **Up** or **Down** to select the current year and press **Enter**.

4. The Set Time option displays.

   a. The **Hour** field flashes. Use **Up** or **Down** to select the current hour and press **Enter**.

   b. In the **Minute** field, use **Up** or **Down** to select the current minutes and press **Enter**.

   c. In the **AM/PM** field, use **Up** or **Down** to select either **A** for a.m. or **P** for p.m. and press **Enter**.

5. Once the new time and date is set, Date/Time and Set Successfully displays on the time clock display. You are taken back to Supervisor Mode menu. Press **Clear** to exit Supervisor Mode.

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6 Additional Functionality

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Additional Functionality

Your Paychex Smart Time application is designed to meet the basic needs of most companies. Out of the box, your time clock comes with all that is needed to begin streamlining your payroll process immediately.

For those companies that desire greater functionality and extended automation, Paychex Smart Time provides additional functionality such as e-mailing alerts to managers, sorting of employees by department, tracking of benefits, a web punch time clock option, and more.

Setting User Permissions

The user permissions feature allows for separate time clock software logins for individual users. Users of the application can be assigned unique permissions settings to access different areas of the system. Follow the instructions below to setup your users.

1. Select **Lists | Users**.

2. Click **Add User**.

3. Type the user's Username, Users Full Name, and Password in the applicable fields.

4. Designate the access Permission Level and Permission Type using the radio buttons.

   - Click **No Access** to make the area off limits for the user.

   - Click **Full Access** to give the user permission to create, edit, and view transactions in that area.

   - Click **Read Only** to allow the user to only view the data in that area, but cannot make edits or changes.

5. Once complete, click **Submit** to save user settings.

   Note: Once you click **Submit**, you cannot change the username. To change the username, you must create a new user and delete the old one.

User Login

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

1. At the employee time clock Login page, have the new user enter their username and password in the applicable fields.

2. Click **Submit** to log in to the time clock software.

If an employee attempts to access an unauthorized page or tries to edit a page with Read Only access, an Access Denied error message displays.

Using Departments

Your system has the ability to track and report labor on a departmental level. Hours worked and labor costs are included in these reports. Overall the system supports up to 32 different departments and each employee can be assigned up to 32 departments. All employees must be assigned to at least one home department.

Customizing Your Departments

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

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

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

3. Enter any notes to be associated with this department in the **Note** field.

4. Type the department code in the **Department Code** field. This code must match the payroll software department code.

5. You have the option to set revision zones by department. Revision zones round punch hours to the start and end times of a specific shift. For additional information, refer to Revision Zones later in this section.

6. Click **Submit**.

Assigning/Changing Departments

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

1. Select **Lists | Employee**.

2. Select an employee. On the Edit an Employee screen, locate the Departments table.

3. Select the department that you wish to assign to the employee from the drop-down menu.

4. If you are assigning more than one department, enter the order that the departments display at the clock when the employee punches in.

   The Add Department option automatically populates with additional departments.

5. Click **Submit** at the bottom of the screen to save your changes.

   Note: If employees punch for breaks, the break department is at the top of the list and does not have an order number.

Removing a Department

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

Punching In/Out of a Department

After pressing **In** at the time clock, an employee assigned to multiple departments has the option to select a department at the time clock terminal.

1. Press **Up** or **Down** to select the applicable department.

2. Press **Enter** to sign into that department.

By pressing **Department Change**, (discussed in Section 1 in the Using Your Time Clock Terminal), the employee has the ability to quickly transfer from one department to another.

1. If an employee needs to punch out of one department and into another department, enter the PIN/badge number or wave their badge, then press **Department Change**. The employee is prompted to select a department.

2. Press **Up** or **Down** to select the applicable department.

3. Press **Enter** to sign into that department. The employee is automatically signed out of the previous department.

   Note: Employees who are assigned the Automatic Entry Method in the program are not able to select departments at the employee time clock terminal.

Revision Zones

Revision zones allow you to round punch hours to the start and end times of a specific shift within a department. Employees are not paid for punching in early or out late. If you do not want to use revision zones, leave the time at the default **12:00a** for each field.

Setting Your Revision Zones

1. Select **Lists | Departments | Edit a Department**.

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

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

    Example: If work for a particular department cannot start until 8:00 a.m., you can setup a revision zone to prevent hours from calculating before the specified time (8:00 a.m.). If an employee clocks in between the In Revision Start and In Revision End Time, the shift start time rounds to the In Revision End Time displayed in the example above. If an employee clocks in between 7:30 a.m. and 8:00 a.m., the shift start time rounds to 8:00 a.m.

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

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

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

Time Off Benefit Tracking

Paychex Smart Time allows you to track and manage vacation, sick, and holiday benefits.

Using Time Off Benefits

1. To enter time off benefit hours on an employee's timecard, open the Timecard report and click **Add Punch**.

2. Select the desired employee from the **Employee** drop-down menu.

3. Select the type you wish to use from the **Type** drop-down menu.

4. Enter the date to apply the hours in the **Date** field.

5. Enter the number of hours you wish to use in the **Time** field.

6. Click **Submit** at the bottom of the Add New Punch screen to save your changes.

SMTP Server

The Paychex Smart Time application allows system alerts to be automatically e-mailed to one or more managers. This includes a data encryption option to encrypt the data while transferring over the Internet.

Important: To send e-mail alerts, you must have a SMTP server available. Contact your network administrator to find out if your company has a SMTP server. If your company does not have an SMTP server, there are many free e-mail server services available.

SMTP Server Settings

What is an SMTP Server? An SMTP server is a computer that receives outgoing mail messages from users and routes them to their intended recipients.

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

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

If used with the SSL encryption option, you may need to specify the mail server port by entering a colon and then the port number after the server address.

Example: smtp.gmail.com:587 connects to smtp.gmail.com and uses port 587. If a port number is not defined, default port number 25 is used.

2. Check the **Use SSL for SMTP** checkbox to use data encryption when sending e-mails. Using SSL may be a requirement for some SMTP server providers and may require that you define the SMTP port.

3. Check the **Use STARTTLS** checkbox if you are using SSL and your SMTP service provider requires that you first connect to the server using an unsecure connection before connecting using SSL.

4. Check the **Use Authentication** checkbox if your SMTP server requires a username and password to send e-mails.

5. Enter the **Auth Username** if you checked **Use Authentication**; enter your SMTP server username.

6. Enter the **Auth Password** if you checked **Use Authentication**; enter your SMTP server password.

7. Type the e-mail address you want to display in the **FROM** field in your e-mail in the **Alert From Address** field. The default setting is Your_Time_Clock.

8. Type your e-mail domain name in the **Email Domain Name** field. You can leave this set at the default setting, timeclockalerts.com.

9. Click **Submit** to save your settings.

For your convenience, configuration settings for the most common SMTP Server providers are located in the following section.

Common SMTP Server Settings

Refer to the following list to find the most common SMTP servers and their configuration settings. If your Internet Service Provider (ISP) is not on the list below, contact your ISP or network administrator for configuration instructions.

For the latest information on the ISPs listed, contact the ISP directly.

Hotmail
Server Address: smtp.live.com:587
Use SSL: checked
Use STARTTLS: checked
Use Authentication: checked
Auth. Username: Hotmail account email address (user@hotmail.com)
Auth. Password: Hotmail account password
Alert From Address: Hotmail account email address
Email Domain Name: optional customization

Gmail
Server Address: smtp.gmail.com:587
Use SSL: checked
Use STARTTLS: checked
Use Authentication: checked
Auth. Username: Gmail account email address (user@gmail.com)
Auth. Password: Gmail account password
Alert From Address: Gmail account email address
Email Domain Name: optional customization

Comcast
   Server Address: smtp.comcast.net:465
   Use SSL: checked
   Use STARTTLS: un-checked
   Use Authentication: checked
   Auth. Username: Comcast username
   Auth. Password: Comcast account password
   Alert From Address: Comcast account email address
   Email Domain Name: optional customization

Verizon
   Server Address: outgoing.verizon.net:587
   Use SSL: un-checked
   Use STARTTLS: un-checked
   Use Authentication: checked
   Auth. Username: Verizon username
   Auth. Password: Verizon account password
   Alert From Address: Verizon account email address
   Email Domain Name: optional customization

Apple MobileMe
   Server Address: smtp.mac.com:587
   Use SSL: user preference
   Use STARTTLS: if user selects to use SSL above
   Use Authentication: checked
   Auth. Username: MobileMe username
   Auth. Password: MobileMe account password
   Alert From Address: MobileMe account email address
   Email Domain Name: optional customization

Enabling SSL Server – Data Encryption

SSL data encryption ensures that all data passed between the time clock and web browser remains private. Enabling SSL is simple.

1.   Select **Device Preferences | Settings**, then the **Device** tab.

2.   Check the **Use SSL Server** checkbox.

Web Punch Time Clock

The Web Punch Time Clock allows you to capture your employee's punches anytime or anywhere using a web browser based time clock that runs on LAN, WAN, Internet, or on a stationary computer. The Web Punch Time Clock also offers advanced functionality like IP location restrictions to help better manage your employees' punches.
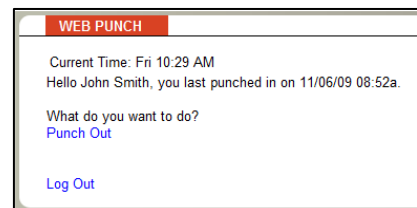
Note: If you are using USB communications, Web Punch will not be available to employees through your local area network or the Internet.

Setting Up Your Employees for Web Punch Time Clock

To assign the employees to use the Web Punch time clock:

WEB PUNCH TIME CLOCK SETTINGS
Assign to Web Punch ☑
Web Punch Password ••••••••••••
Authorized IP Address(es) ••••••••••••
Allow Punch from Unauthorized IP ☐
Use Global Authorized IP Address ☑

Submit   Cancel

1.   Select **Lists | Employee List**.

2.   Select an employee. The Edit an Employee screen displays.

3.   Check the **Assign to Web Punch** checkbox to enable Web Punch for this employee.

4.   Type a password for the employee to use when punching in/out on the Web Punch Time Clock in the **Web Punch Password** field.

5.   Type the IP address that this employee may punch from in the **Authorized IP Addess(es)** field. Leave this field blank to allow the employee to punch from any IP address.

6.   Check the **Allow Punch from Unauthorized IP** checkbox to allow the employee to punch from an unauthorized IP address.

7.   Check the **Use Global Authorized IP Address** checkbox to allow an authorized IP address for all employees.

8.   Click **Submit** to save your settings. Repeat the steps above for each employee you wish to assign to the Web Punch Time Clock.

Punching In/Out Using Web Punch Time Clock

Employees assigned to the Web Punch Time Clock can now punch in/out anytime, anywhere, using a web browser based time clock.

LOGIN
Username/PIN 023
Password •••••
Mon 1:15 PM
Submit
🔓 This connection is NOT secured.

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

1.   Open the employee time clock **Login** page.

2.   Type the assigned PIN/badge number in the **Username/PIN** field.

3.   Type the employee's assigned Web Punch password in the **Password** field.

4.   Click **Submit**. The employee Web Punch screen displays.

WEB PUNCH
Current Time: Wed 1:01 PM
Employee Name: David Bisnar
State: Punch In
Choose a department:
Shipping
Office
Confirm

5.   Select the appropriate option (**Punch In**, **Punch Out**, or **Department Change**) to complete your punch.

6.   If the employee has the ability to change departments, select the department.

7.   Click **Confirm**.

8.   After punching in or out, the Web Punch screen lists the employee punch information.

- **Week Hrs**: Lists the total hours the employee worked for the week.
- **Day Hrs**: Lists the total hours the employee worked for the day.
- **Punch Hrs**: Lists the total hours the employee worked for that punch pair.

Running Reports with the Web Punch Time Clock

To make it simple to identify punches from a web browser, punches are flagged with a **W** after the punch time. If a punch comes from an unauthorized IP address, it is flagged with an **X**.

By clicking on the punch, additional information about that punch displays.

Web Punch IP Address: Lists the IP address of the computer/device the employee punched in/out from.

Web Punch Browser: Lists the web browser the employee used while punching in/out.

IP Address Restriction

Using IP Address Restriction, you can restrict an employee to web punch in/out from only authorized locations via the IP address of their computer or web-enabled device. If an employee attempts to web punch in/out from an unauthorized location (IP address), you may set the system to lock them out or allow it, but flag the punch as coming from an unauthorized location. This information displays on a report.

IP address restrictions are enforced by setting authorized IP addresses globally (company wide) and/or by employee.

Setting Authorized IP Addresses Globally

Global Authorized IP Address(es) assigns the IP address that all employees are authorized to use. To set this, follow the instructions below.

1. Select **Settings | Preferences** and click the **Device** tab.

2. In the **Global Authorized IP Address(es)** field, enter the IP address(es) of the computer (or other web-enabled device) the employees are authorized to punch in/out.

   The authorized IP address can be listed in the following ways.

   - **Any IP Address**: Leave the field blank to allow employees to punch in/out from any IP address.

   - **Multiple IP Addresses**: Put a comma between the authorized IP addresses to allow the employee to punch from any IP address listed.

     Example: 192.168.3.6, 192.168.3.784

   - **Range of IP Addresses**: The employee can punch at computers with an IP address that falls within the 30-45 range.

     Example: 192.168.3.30-45

3. Click **Submit** to save your changes.

   Note: If an employee is not authorized to punch in/out from the Global Authorized IP Address, uncheck the **Use Global Authorized IP Address** option in the employee's Edit an Employee screen.

Setting Authorized IP Addresses by Employee

The employee's **Authorized IP Address(es)** field assigns the IP address that a particular employee is authorized to punch in/out. To set the authorized IP address(es), perform the following instructions.

1. Go to the **Employee** page and select the employee from this list.

2. In the **Authorized IP Address(es)** field, enter the IP Address(es) of the computer (or other web-enabled device) that the employee is authorized to punch in/out.

3. You can list the authorized IP address(es) in the following ways.

- **Any IP Address**: Leave this field blank to allow employees to punch in/out from any IP address.

- **Multiple IP Addresses**: Put a comma between the authorized IP addresses to allow the employee to punch from any IP address listed.

   Example: 192.168.3.6, 192.168.3.784

- **Range of IP Addresses**: The employee can punch at computers with an IP address that falls within the 30-45 range.

   Example: 192.168.3.30-45

4. Check the **Allow Punches from Unauthorized IP** checkbox to allow employees to punch in/out from an unauthorized IP address. Punches from unauthorized IP addresses are flagged with an **X** on the reports.

5. Click **Submit** to save your changes.

Locking the Time Clock Terminal Keypad

This feature prevents employees from punching in for a coworker, otherwise known as "buddy punching". This is recommended for those using the Proximity badges for employee punching. To lock the time clock terminal keypad, follow the steps below.

1. Select **Navigation | Settings**, then click the **Device** tab.

2. Under **Device Preferences**, check the **Lock Keypad** checkbox. By checking this box, employees are no longer able to punch in or out using their PIN number.

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7   Troubleshooting and Frequently Asked Questions

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Troubleshooting and Frequently Asked Questions

For your convenience, troubleshooting tips and answers to the most frequently asked questions are provided in this section. In addition, our technical support staff is available to answer your questions at 1-877-234-1851.

Frequently Asked Questions

I added a new punch for an employee, but I do not see it on my report. What could be wrong?

There are two possible reasons:

- The report screen defaults to the original time frame after the punch is added. The punch was probably added into a different time frame. Click **date** to select and view the proper time frame. If you were viewing **all** employees in the Timecard report, you are brought back to a Timecard report for that specific employee. From **date**, select **all** employees to view the original report.

- If you are using Batch Edits (set in **Settings | Preferences | Device**), you may need to click **Refresh** at the top of the report. This applies all changes made to the report. This option is discussed in Section 2.

The program seems to be slow when I edit punches. What can I do to improve system performance?

If the punch editing process slows down over time, there are various things that you can do to assure optimal performance.

- We highly recommend only keeping the most recent data on your time clock. In order to keep your system running optimal, delete unneeded data off of the clock. Refer to Removing Data from Your Time Clock in Section 5 for additional information.

- Using pop-up windows and batch edits is another way to make editing punches much faster. Instructions on configuring pop-up windows and batch edits are located in Device Preferences in Section 2.

- Instead of using the Timecard report for editing punches, we recommend that you use the Attendance report. Running this report takes less time clock resources and less time to generate.

- Minimize how often your time clock checks for alerts. Instructions for changing these settings can be found in Alert Preferences as discussed in Section 2.

- Disable any alerts that you are not using from the Alerts Setup screen. Click **Settings | Alert Setup**. To disable an alert, deselect the checkbox in the far left column. This prevents the alert from posting to the Home page.

How do I determine the software version of my employee time clock?

Your current time clock software version is located at **Help | About Your Clock**.

How do I set up my time clock so I can access it externally through the Internet?

Paychex Smart Time is unique because it can be accessed remotely over the World Wide Web. To do this, you will need the following:

- A broadband Internet connection (Cable, DSL, T1, etc.) at the location of the clock.

- A "Port-Forwarding" router.

- The time clock must be connected to your router by an Ethernet (for example, CAT5) cable.

Tip: A static external IP address is recommended. Obtain this from your Internet Service Provider (ISP).

There are a couple of ways to find this address:

- On a computer on the same local network as the clock, go to **www.whatismyip.com**.

- Look in your router's property settings for the Wide Area Network (WAN) address.

Follow the instructions below to configure remote/Internet access:

1. Set up your clock so that you can access it on your local internal network. Refer to the *Paychex Smart Time Quick Start Guide* for additional information.

2. Configure your router to use port-forwarding on port 80. The internal or private port must be set to TCP port 80 **or** TCP port 9844 on your router. Use port 9844 if port 80 is not available.

   If you are unsure how to configure your router, refer to your router documentation or call the manufacturer of your router. An IT professional or a computer consultant can likely assist you with your router's configuration.

   After you configure your router correctly, connect to the clock through the Internet by logging onto the router's external IP address (provided by your ISP). For example, if your public IP address is 66.213.247.254 and your clock is using port 9844 on your router, the following would be entered into your Web Browser address bar:

   http://66.213.247.254:9844/

   Tip: If you cannot connect to the time clock, check to make sure you do not have a firewall activated between the computer and the clock. Other things to check for are; an incorrect IP Address or port number, duplicate IP addresses, or additional filter settings on your router.

   Note: For additional information on setting up a port forwarding router, go to How to Setup Port Forwarding on a Router at **www.wikihow.com/Set-up-Port-Forwarding-on-a-Router**.

   Paychex Smart Time is not responsible for configuring your router because there are many different types, brands, and models of routers and networks. We recommend that you contact an IT professional or consultants if you are in need of additional troubleshooting help.

Why can't I access my time clock? How do I set a static IP Address?

If the clock was assigned a dynamic IP address, this address may have changed if the router reboots or your time clock is unplugged from the power. A static IP address does not change the way a dynamic one does and is strongly recommended. To assign a static IP address, follow the instructions below.

1. Determine an available IP address for the employee time clock. Your administrator or IT professional can provide you with this information or help with these steps.

2. Enter into Supervisor Mode at your employee time clock terminal.

    a. Press the supervisor key on the time clock.

    b. Enter your security code. The default security code is **00 00 00**.

3. Scroll through the options using **Up/Down** until you find View IP Address, then press **Enter**. The current IP Address of the clock displays.

4. Press **Enter**.

5. Enter the desired IP address, including leading zeros.

    Example: 192.168.002.028

6. A message displays on the clock, IP Address set successfully. Press **Clear** to exit Supervisor Mode.

    Note: If the clock is on the same local subnet as your computer, you should not have to change the settings for subnet mask, gateway, or DNS server. Your network supervisor knows how to set this up, if necessary.

7. Unplug the power to the clock for a few seconds, then plug it back in. Allow the clock to reboot.

8. Open a web browser on your computer and in the address bar, type the IP address of the clock to log into the time clock.

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